

QATAR NATIONAL TOURISM SECTOR STRATEGY 2030

Qatar Tourism Authority 

A World-Class Hub with Deep Cultural Roots

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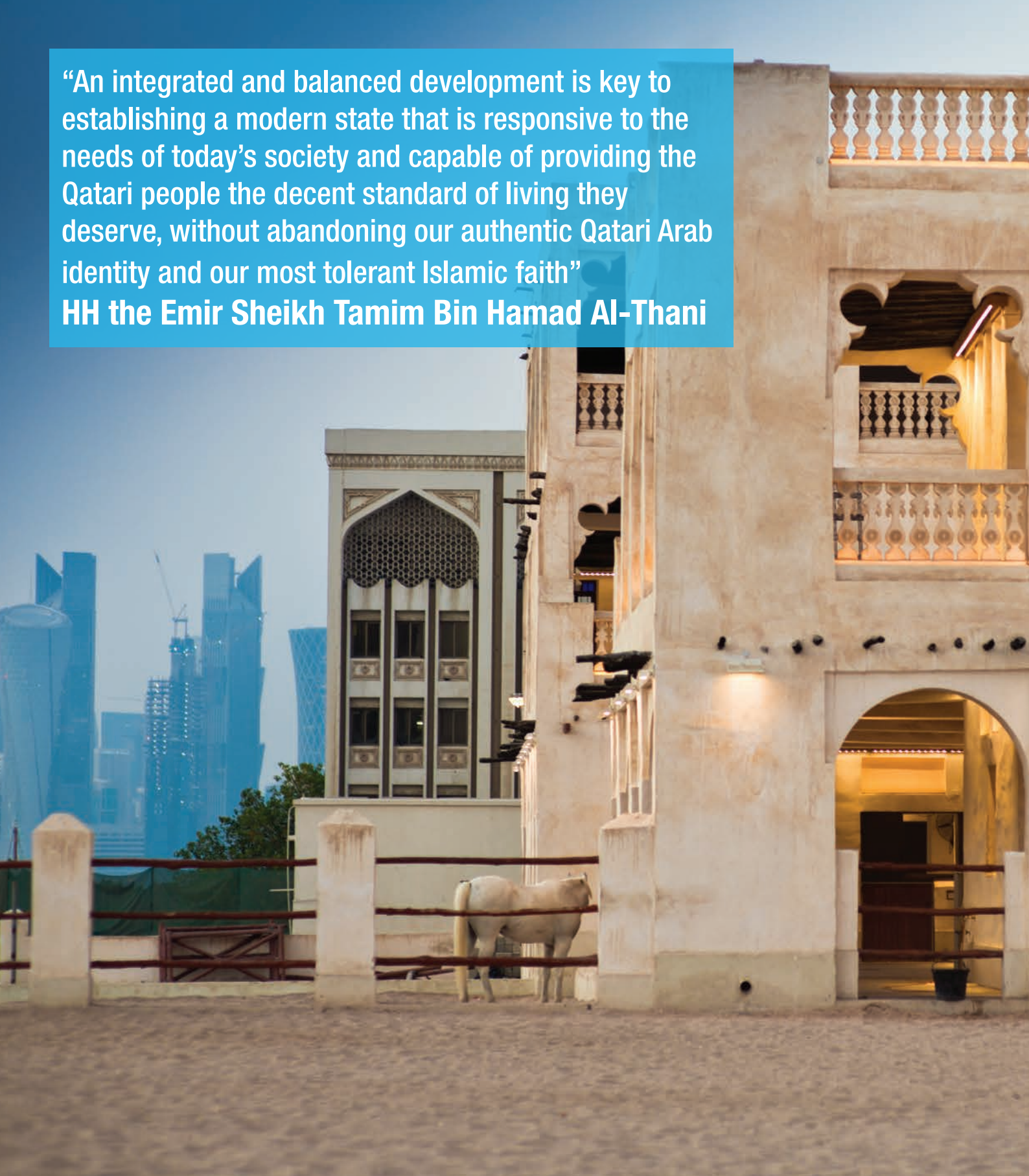
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“An integrated and balanced development is key to establishing a modern state that is responsive to the needs of today’s society and capable of providing the Qatari people the decent standard of living they deserve, without abandoning our authentic Qatari Arab identity and our most tolerant Islamic faith”

HH the Emir Sheikh Tamim Bin Hamad Al-Thani



Foreword

Ensuring that our children, and our children's children, can enjoy the same or even better standards of living as we do is foremost among the priorities of the leadership of Qatar, who is wholeheartedly committed to sustainable development.

Yet, achieving the sustainable development goals, whether on the economic, social, cultural, or environmental level, requires diversifying the economy and reducing Qatar's dependence on its hydrocarbon resources, which are cornerstones upon which the Qatar National Vision 2030 and the country's first National Development Strategy 2011-2016 were established.

As a driver of sustainable development, tourism can play a significant role in further propelling the country forward, particularly when considering Qatar's significant tourism potential which is still to be fully explored and leveraged.

Indeed, with its rich cultural heritage, central geographical location, expanding state-of-the-art infrastructure, award-winning national airline, business-friendly environment, and reputation for hospitality, Qatar has everything it takes to be a major tourism destination.

Within that context, the National Tourism Sector Strategy 2030 was developed, following a nation-wide consultative process, as an integrated effort to advance Qatar's tourism industry and to draw the world's attention to the country's growing tourism offering across culture, family entertainment, business, sports, health and wellness, ecotourism, and education.

As the entity in charge of planning, regulating, and promoting sustainable tourism in Qatar and the country as a preferred destination, the Qatar Tourism Authority spearheaded the development of the Strategy and will coordinate its execution.

The success of the Strategy and its ability to lead to the desired outcomes, however, hinges on having the public and the private sector, as well as civil society, work hand-in-hand in ensuring its effective implementation.

Last but not least, I am confident that we all have the will and the drive to see Qatar continue on its path of growth and development. At QTA, we are committed and determined to lead by example and to play our part in standing up to our responsibility in achieving that objective. I call on all parties, whether from the public or the private sector, to do the same for the greater sake of Qatar and its proud and deserving people.

God willing, Qatar is set to truly become an unavoidable destination on the world tourism map, a world-class hub with deep-cultural roots.



Issa Bin Mohammed Al-Mohannadi
Chairman, Qatar Tourism Authority

Why is there a Need for a Tourism Strategy?

A.Tourism: A Catalyst for Growth

Tourism is a major catalyst for socio-economic growth, whereby not only does it contribute to expanding the economy, attracting investments, and creating jobs, but also can help enhance the nation's brand on the international stage, encourage intercultural dialogue, and gradually shatter barriers between people around the world.

Over the last decade, tourism has been one of the fastest growing industries the world over. According to the World Travel and Tourism Council (WTTC), it was responsible as of 2012 for 8.7% of total employment and contributed 9.3% to the global economy.

Beyond simply impacting the hospitality and travel industries, tourism's positive influence spreads across all sectors of the economy, from retail, construction, and telecommunications, to manufacturing, media, and banking, to name a few.

Though many equate tourism to leisure and entertainment alone, tourism is a much broader sector, as it includes business, cultural, health and wellness, sports, ecotourism, and educational tourism as well.

In a country heavily reliant on its hydrocarbon wealth, tourism can play a pivotal role in helping diversify Qatar's economy, in turn shielding it from market fluctuations which can significantly impact its economy and growth.

Moreover, while oil and gas are finite and depletable resources, tourism is a sustainable and non-exhaustive source of economic activity, often serving as one of the most effective drivers for the development of regional economies.

Besides its implications on the economy, a flourishing tourism sector in Qatar will offer numerous other benefits on a nationwide scale. For starters, it will put the country on the international tourism map and allow the world to discover and appreciate what the country has to offer and the uniqueness of its culture and heritage, helping uphold and perpetuate its many entrenched values and traditions, including on the level of the cultural artifacts and local handicrafts.

An influx of travelers and explorers will also promote an exchange of ideas between Qatar and the world community, thereby promoting mutual tolerance and appreciation.

Most of all, being a globally popular tourism destination would be a matter of pride and joy for current and future generations of Qataris.

“Tourism is a sector that can deliver, like not many others, on all three pillars of sustainable development: economic growth, social progress, and environmental sustainability”
Taleb Rifai, Secretary General - UNWTO



B. Qatar's Tourism Today: The Untapped Opportunities

Until recently, Qatar had faced a number of challenges that impeded the ability of its tourism sector to reach its full potential.

On the awareness level:

- Insufficient understanding and recognition of the paramount role that tourism can play in the sustainable development of Qatar
- An entrenched misperception of Qatar as a business-only tourism destination

On the planning level:

- Lack of cohesive efforts and an overarching strategy for promoting tourism in Qatar
- A sub-optimal tourism sector institutional framework
- A limited mechanism in place to consolidate tourism-related legislative policies under one authority

On the regulatory level:

- Relatively strict entry barriers and sub-optimal visa procedures for most nationalities
- Inadequate sector regulations hindering growth and development
- Sub-optimal investment policies limiting investment opportunities and access to foreign direct investments

On the marketing level:

- Ad-hoc and improvised attempts to position Qatar on the world tourism map
- Lack of a clear brand identity and look and feel for Qatar, at the national or regional levels
- A seasonal tourism resulting from endogenous factors but also sub-optimal promotional efforts

On the investment level:

- Low investments in the tourism sector relatively to other countries
- Lack of targeted tourism investments

On the product level:

- A relatively sub-par tourism offering, both qualitatively and especially quantitatively
- A tourism offering mainly limited to Doha
- A significant shortage in the variety of accommodations offered to visitors

On the human capital level:

- Shortage of a qualified tourism human capital
- Lack of tourism-related education programs at local schools and universities

These challenges, in turn, created the need for a national tourism strategy and for greater support for the concerted efforts carried out by the Qatar Tourism Authority (QTA), and which have already started to pay off.

Today, every tourist has their own reason for traveling to Qatar. Some come to explore the country's rich cultural heritage while others arrive to take in the sun and sights, attend exhibitions and business meetings, witness international sporting contests, or experience the authentic experiences of the desert.

Yet, while tourism has been growing in Qatar, it still has considerable ways to go to reach its optimal potential, whether in terms of the absolute number of inbound tourists, the segments and mix of incoming tourists, or the tourism offering and products on hand.

Case in point, **1.2 million** tourists visited Qatar in 2102, the largest majority of which visiting from other Arab nations, creating the need to diversify the markets of origin from which to attract visitors.

The opportunities, though, are limitless. Qatar already possesses the required fundamentals for a thriving tourism industry, most important of which is the celebrated hospitality of its people, and the commitment and support of the country's leadership and its willingness to invest resources and efforts in driving the sector forward.



Other key success factors include:

- Political stability and security, with one of the lowest crime rates in the world
- A growing and increasingly cosmopolitan population
- An ever-expanding infrastructure
- Easy access to quality healthcare services
- A business-friendly environment
- An award-winning 5-star airline that has turned Qatar into a leading international travel hub
- A rising presence on the global stage, thanks to key investments made in some of the leading brands in the world
- Natural vistas unspoiled by uncontrolled development
- Opportunities to enjoy authentic experiences unparalleled in the region



C. Qatar’s National Development Plans: Welcoming the World

In addition to the intrinsic historical, cultural, and geographical elements that contribute to the appeal of Qatar as a tourism destination, the Government of Qatar has been intensifying efforts to boost the country’s profile and offerings to its citizens and visitors.

Its multi-pronged approach has focused on several key areas, such as:

- Cultivating a rich collection of museums and cultural highlights
- Setting the stage for world-class conventions and exhibitions
- Constructing exceptional urban developments
- Bringing a plethora of high-profile sporting events to the country
- Promoting outstanding educational opportunities at world-class universities
- Building a new ultramodern airport and one of the world’s most advanced rail transit systems

Not only do such milestone plans help enhance Qatar’s tourism offering, but they also create the need to secure the continued and sustainable growth of its tourism sector, in a way to ensure their viability and success.

In fact, with Qatar hosting a series of global events, including the FIFA World Cup 2022, it is now critical for the nation to grow and expand its tourism, so as to manage in drawing the critical mass of tourists and visitors who can guarantee the popular and commercial success of the events.

The role of the National Tourism Sector Strategy 2030, accordingly, will be to capitalize on what has already been done and to concentrate efforts into building on and introducing such achievements to the rest of the world.

Products

World-Class Convention and Exhibition facilities



DECC

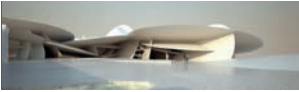


QNCC

Multiple Cultural Offerings



Arab Museum of Modern Art



Qatar National Museum



Museum of Islamic Art



Souq Waqif



Katara



Orientalist Museum

Key National Development Plans in Qatar

Services

World-Class Urban Developments



Hamad International Airport City



Msheireb



The Pearl



Lusail

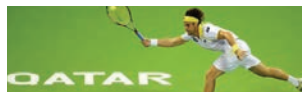


New Doha Zoo

High Profile Sports Events and Projects



Al Wakrah Stadium



Exxonmobil



MotoGP - Lusail



Aspire



Qatar Master



Handball Championship

World-Class Education Offering



QSTP



Education City



Qatar University

Advanced Infrastructure & Transportation Services



Hamad International Airport



Qatar Airways



GCC Railway Planned 2016



Domestic Rail Port

“Qatar is now embarking on a new phase of sustainable development. The focus of this new phase is the diversification of the national economy and expansion of non-oil and gas sectors. We are looking for the active participation of the private sector to encourage positive competition and to support the employment, training and development of young people.”

HE Sheikh Abdullah Bin Nasser Bin Khalifa Al-Thani
Prime Minister & Minister of Interior

What will the Strategy Achieve?

The National Tourism Sector Strategy 2030 is set to have numerous benefits on a nation-wide level.

These benefits, and the ability of the Strategy to achieve its objectives, are rooted in the pillars upon which it was established and that characterized its development process, and will depend on the commitment of all stakeholders to work together towards its efficient implementation.

A. Development Process

The National Tourism Sector Strategy 2030 was developed in line with the objectives of the Qatar National Vision 2030, the country's first National Development Strategy 2011-2016, as well as the different national sector strategies.

Accordingly, four guiding principles were chosen as the framework that would underpin the Strategy, guaranteeing its alignment with the national priorities.

1. It must be in harmony with local traditions and values

- Uphold Qataris' Arab and Islamic identity and moral code
- Encourage family values and social cohesion

2. It must align with the national agenda

- Contribute to economic, social, and human development
- Help reduce Qatar's reliance on energy and diversify its economy

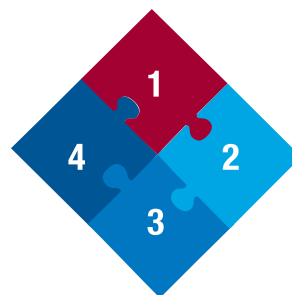
3. It must create a positive economic impact

- Enhance productivity and create employment in tourism and non-tourism sectors
- Promote SME activity and encourage private initiative and entrepreneurship
- Spread tourism offerings to all parts of Qatar rather than just Doha

4. It must be environmentally responsible

- Ensure that pollution and waste generation is managed carefully
- Minimize pressure on the country's precious natural resources
- Preserve Qatar's delicate and unique ecosystems

Guiding Principles for the Qatar National Tourism Sector Strategy 2030



1. Fit with Local Tradition & Moral Values
2. Alignment with National Agenda
3. Economic Impact
4. Environmental Sustainability

- ✓ National Vision 2030
- ✓ National Development Strategy 2011-2016

“Collaboration and cooperation are undoubtedly the keys to success. If we put in the effort together today, we shall reap the benefits together tomorrow”.

*Issa Bin Mohammad Al-Mohannadi,
Chairman – QTA*

The Strategy was developed following a nation-wide consultative process spearheaded by QTA, allowing to take into account the input and feedback of a wide range of stakeholders, be they Ministries and other Government agencies, private sector and civil society entities, industry professionals, or journalists and opinion leaders.

Global reports published by key international organizations also ensured that the Strategy was developed according to international best practices and based on solid facts and figures.

Add to that, a comprehensive benchmarking exercise was conducted, in which the cases of various other regional and international countries that had established tourism strategies were carefully reviewed. This served to extract key lessons on pitfalls to avoid and opportunities to focus on when embarking on a national tourism strategy.

Sources of Input



B. National Benefits

The National Tourism Sector Strategy 2030 is set to have numerous economic, social, cultural, and environmental benefits, in addition to various positive ramifications on the tourism industry in Qatar.

Economic Benefits

- Diversified economy
- Greater foreign and domestic investments
- Increased GDP
- More opportunities for entrepreneurship and private initiative
- Growth in the number of SMEs
- Reinforced role for the private sector in the economy
- Advanced and more developed tourism sector characterized by world-class standards, capabilities, and performance levels

Social Benefits

- Greater opportunities for family-friendly leisure and recreation
- Equitable and balanced development of all areas and regions in Qatar
- Better return of investment on the infrastructure
- Increased employment opportunities
- Easier access to transportation
- Strengthened ability to host world-class international events, including the FIFA World Cup 2022
- Ability to benefit on the long-term from the investments made to host the FIFA World Cup 2022 as well as other landmark events
- Chance to ensure a prosperous and thriving future for the generations to come

Cultural Benefits

- Opportunity to uphold and promote Qatar's cultural legacy and traditions
- Expansion of Qatar's cultural tourism offering through projects showcasing the country's distinctive heritage and perpetuating many of its traditions
- Greater promotion of local artisans and their work
- Additional support for the development of local artistic talent

Environmental Benefits

- Greater ability to protect the country's natural resources
- Improved capacity to preserve fragile habitats and ecosystems
- Enhanced capability to safeguard the country's wildlife, fauna and flora
- Reduced road congestions and air pollution levels resulting from a more efficient transportation network

Industry Benefits

- Better planning and growth-conducive regulations in line with international best practices
- Greater role for the private sector in spearheading tourism-related initiatives and plans
- A greatly enhanced tourism human capital
- Better targeted and more efficiently rolled out tourism promotional efforts
- Increased synergy between the various industry stakeholders from the private sector, the public sector, and civil society



C. Facts & Figures and Key Performance Indicators (KPIs)

Direct Impact on GDP (as % of GDP)					
2012	2015	2020	2022	2025	2030
~0.8%	~0.9%	~1.6%	~2.3%	~2.3%	~3.1%

Total Impact on GDP (as % of GDP)					
2012	2015	2020	2022	2025	2030
~2.6%	~3.3%	~3.4%	~3.9%	~4.2%	~5.1%

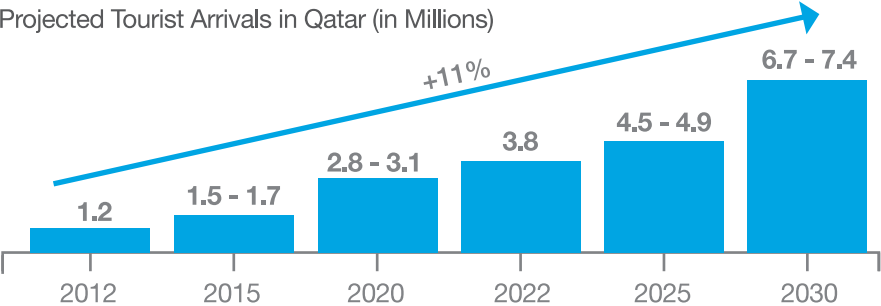
Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

Tourism directly contributed around 0.8% to the country’s GDP in 2012. The Strategy will help grow that figure to around 3.1% in 2030. The aggregate impact of tourism on the GDP (including both direct and indirect contributions) will meanwhile grow from 2.6% in 2012 to around 5.1% in 2030.

Projected Total Number of Jobs in the Tourism Sector in Qatar (In ‘000 of Employees)					
2012	2015	2020	2022	2025	2030
~25	~32	~60	~80	~92	~127

Qatar’s National Tourism Sector Strategy Sector Economic Impact Model; Booz & Company analysis

Around 25,000 people (or 1.8% of total employment in Qatar) worked in the tourism sector in Qatar in 2012. That number is expected to grow to 127,000 (or 5.3% of total employment in Qatar) by 2030 as a result of the Strategy.



Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

The Strategy will help boost the number of international tourist arrivals to Qatar to around 7 million visitors in 2030, up from 1.2 million visitors in 2012. This constitutes an annual compounded average growth rate (CAGR) of ~11%.





Projected Tourist Arrivals in Qatar by Country of Origin

	2012	2015	2020	2022	2025	2030
GCC Arrivals	~70%	~67%	~58%	~50%	~44%	~36%
Non-GCC Arrivals	~30%	~33%	~42%	~50%	~56%	~64%

Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

In 2012 70% of all visitors to Qatar were from the GCC, compared to 30% from the rest of the world. The Strategy will help reverse that trend, drawing proportionately more visitors in 2030 from the rest of the world than from the GCC alone (64% vs. 36%).

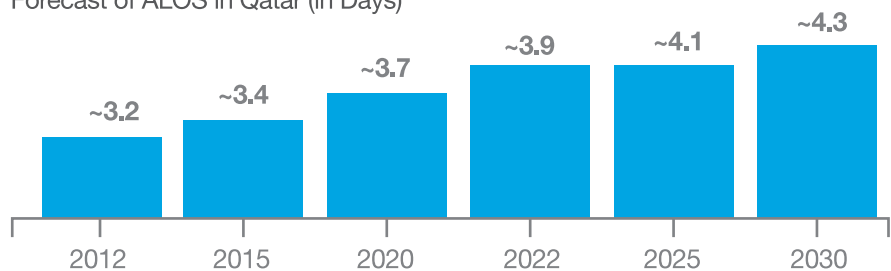
Projected Breakdown of Tourist Arrivals in Qatar by Purpose of Travel

	2012	2015	2020	2022	2025	2030
Business	73%	67%	54%	46%	42%	36%
Leisure	27%	33%	46%	54%	58%	64%

Qatar's National Tourism Sector Strategy Sector Economic Impact Model; Booz & Company analysis

In 2012, 73% of all non-GCC tourists to Qatar visited the country for business purposes, compared to 27% who chose Qatar for leisure. By 2030, 36% of all non-GCC tourists will visit Qatar for business purposes, compared to 64% who will choose it for leisure. The world average today stands at 83% of leisure-oriented tourists versus 17% of business-oriented tourists.

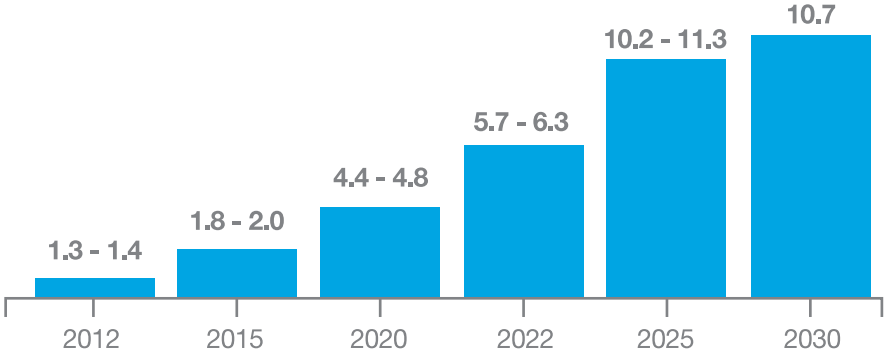
Forecast of ALOS in Qatar (in Days)



Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

In 2012, tourists tended to stay an average of around 3.2 days in Qatar. That figure is projected to rise to round 4.3 days, driven by the Strategy's focus on drawing different segments of tourists and visitors from countries farther to Qatar.

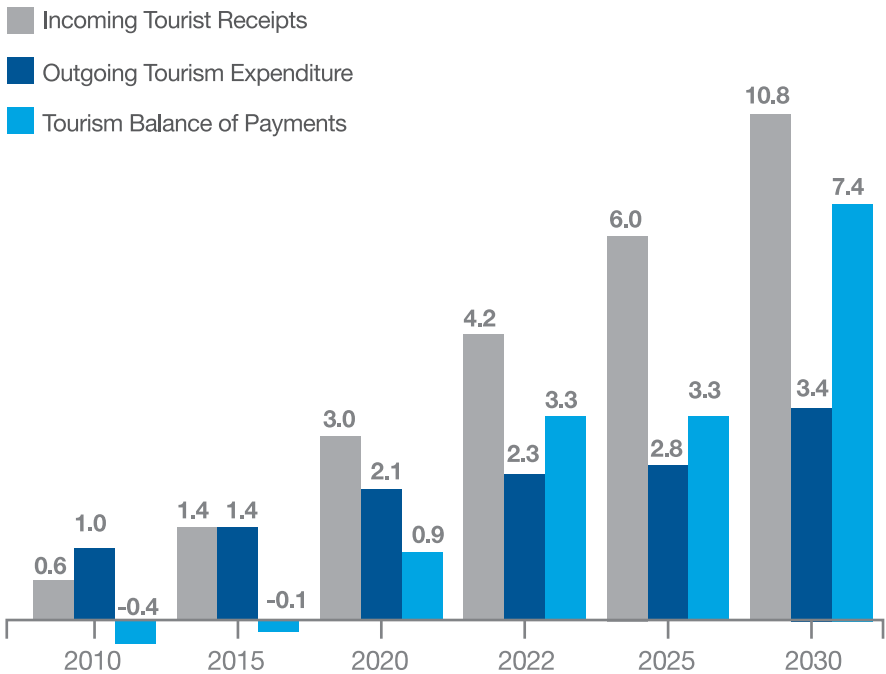
Projected Total Tourist Spend in Qatar (in \$ Billions)



Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

In 2012, total tourist spend reached between \$1.3 and \$1.4 billion. By 2030, that number is projected to grow to around \$11 billion.

Tourism Balance of Payments in Qatar (in \$ Billions)



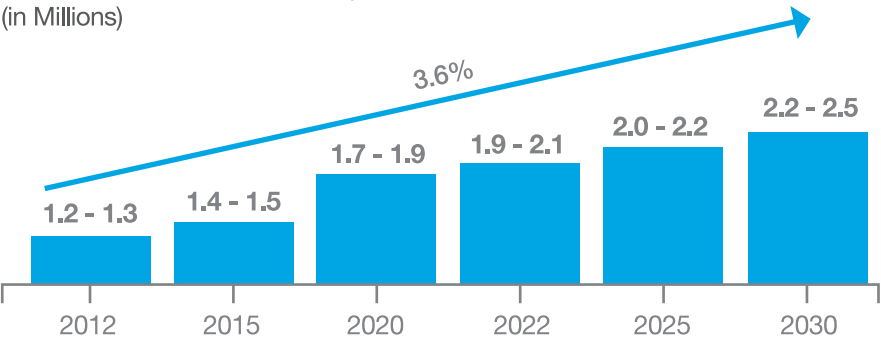
Qatar's National Tourism Sector Strategy Sector Economic Impact Model; Booz & Company analysis

In 2010, Qatar's tourism balance of payment was negative, with outgoing tourism expenditures surpassing incoming tourist receipts by around \$400 million. The Strategy will help reverse that trend, with the tourism balance of payment to reach a positive \$7 billion to \$7.8 billion in 2030.





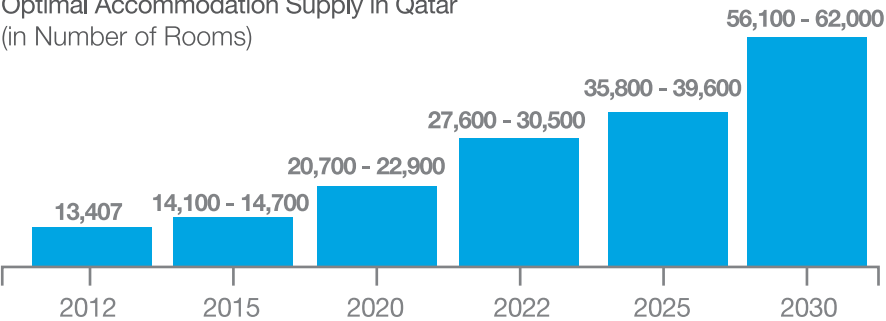
Forecast of Domestic Tourist Trips
(in Millions)



Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

In 2012, the total number of domestic tourist trips reached around 1.3 million tourists. By 2030, that figure is expected to grow to between 2.2 and 2.5 million tourists.

Optimal Accommodation Supply in Qatar
(in Number of Rooms)



Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

In 2012, 13,407 rooms were available as accommodation for visitors to Qatar. By 2030, that figure is expected to grow to between 56,100 and 62,000 rooms.

Optimal Accommodation Supply by Type in Qatar

HOTEL	2012	2015	2020	2022	2025	2030
1 Star	1%	1%	1%	1%	1%	2%
2 Star	4%	4%	4%	5%	5%	6%
3 Star	12%	11%	13%	15%	16%	18%
4 Star	30%	33%	34%	34%	33%	33%
5 Star	43%	39%	34%	33%	32%	31%

Euromonitor, World Bank, WTTC, Qatar Tourism Authority, Booz & Company analysis

In 2012, 43% of all offered rooms were in 5-star accommodations, compared to other categories of accommodation. By 2030, this figure is expected to proportionately decline to 31%, with a more diversified accommodation offering set to be available to visitors.

How will the Strategy achieve its Objectives?

The National Tourism Sector Strategy 2030 will achieve its objectives by focusing on the four main priorities areas of the tourism sector:

SECTOR PRIORITY AREAS

A. PROPER GOVERNANCE & COMPREHENSIVE PLANS, POLICIES, AND REGULATIONS

B. SECTORAL CAPACITY BUILDING

C. DIVERSIFICATION AND DEVELOPMENT OF QATAR'S TOURISM PRODUCT AND SERVICE PORTFOLIO

D. OPTIMAL MARKET MIX

A. Proper Governance & Comprehensive Plans, Policies, and Regulations

Achieving the objectives of the Strategy will first require establishing the pre-requisite sector infrastructure that subsequent product development and promotional efforts can build on.

Accordingly, the Strategy identifies a number of sector enabler to address, whether on the governance, planning, marketing, human capital development, or institutional capacity-building level.

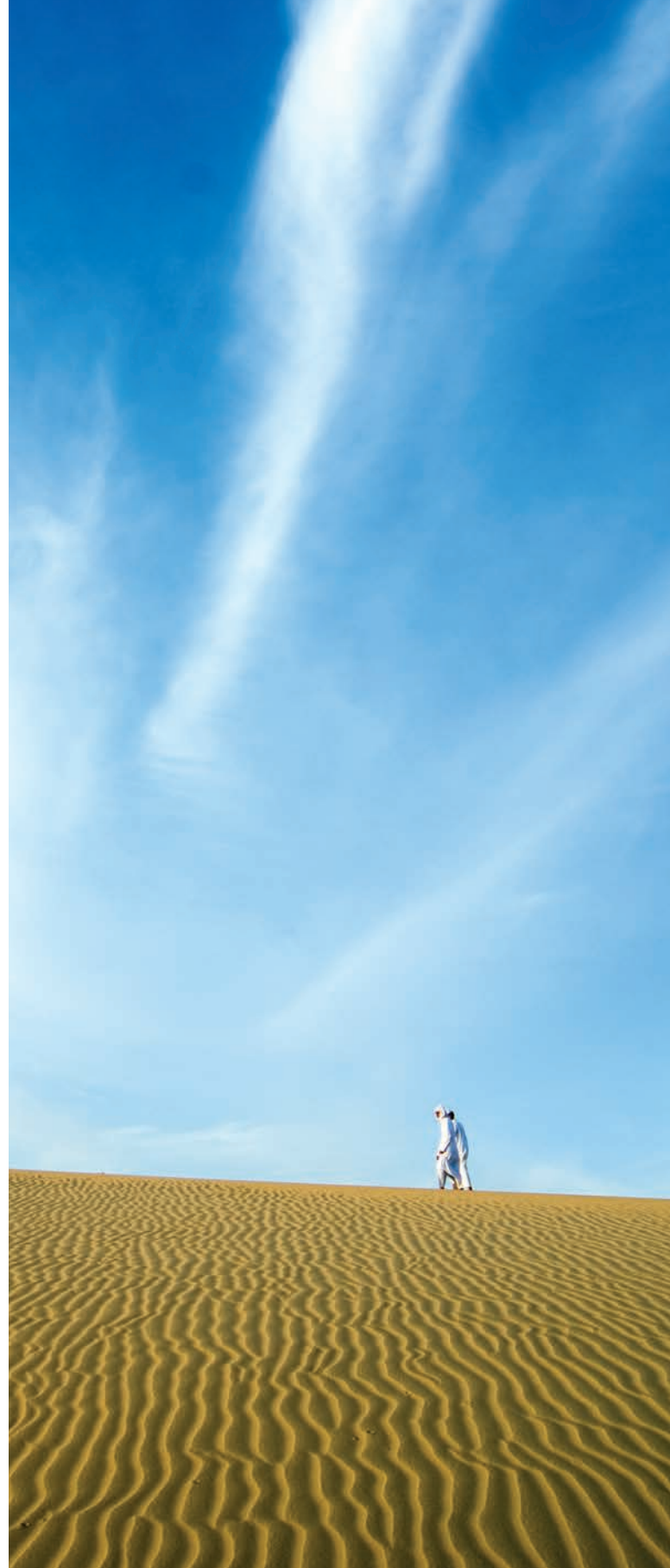
This, in turn, will be accomplished through both Public-Public Partnerships (PUPs) and Public-Private Partnerships (PPPs), with QTA having already established solid partnerships with the likes of the Qatar Development Bank (QDB) and other local banks, the Ministry of Economy and Trade, Enterprise Qatar, Qatar Airways, Mowasalat and Qatar Museums Authority.

Programs that will enhance Qatar's tourism sector enablers include:

- Promoting and activating investments in tourism
- Developing the brand identity of Qatar as a tourism destination based on a clear strategic positioning
- Developing full-fledged targeted MICE and marketing tourism strategies
- Providing tourists relationship management capabilities
- Developing research and statistics capabilities and systems

Additional programs that will be implemented and that are necessary to attract more tourists to Qatar, to boost tourism development outside of Doha, and to ensure a green and sustainable tourism sector, include:

- Enhancing visa procedures for tourists, with the support of the Ministry of Interior
- Expanding the tourism-related infrastructure outside Doha, with the support of the Public Works Authority (Ashghal) and the Ministry of Municipality and Urban Planning
- Guaranteeing the sustainable environmental conditions of tourism projects, with the support of the Ministry of Environment



B. Sectoral Capacity Building

The Strategy also underlines the need to build the sector's human resources' capabilities, in a way to enhance its readiness and competitiveness, as well as to allow optimizing the experiences of tourists when visiting Qatar.

A number of high-impact programs will be implemented towards that objective, including:

- Developing strategic planning capabilities in tourism
- Developing tourism human resources capabilities, with the support of local universities and training centers

Moreover, highly-qualified industry talents from across the world will be encouraged to join the industry in Qatar, helping transfer knowledge and develop the expertise of the new generation of local talents, who will be increasingly drawn to the sector.

Enhancing the tourism human capital skills and service level will, in turn, translate into more business opportunities for all industry players and a direct positive impact on their financial bottom line.

On the institutional level, the Strategy similarly underlines the need to build QTA's internal capabilities as a means to ensure organizational efficiency, particularly that the Authority is the custodian of the tourism sector in Qatar and will oversee the proper implementation of the Strategy.

Within that context, and in line with the sector's objectives, the Authority's 5-year strategic plan sets the priorities to address and the targets to achieve, allowing to establish Key Performance Indicators to rely on in measuring the efficiency of the plan.

KPIs include:

- Qatar achieving a rank of 35 in the Travel & Tourism Competitiveness Index (TTCI) by 2018
- Participating in enhancing Qatar's nation brand
- Increasing the tourism sector's contribution to GDP to \$3.1 billion and reaching a total of 2.4 million inbound international tourists and 1.7 million domestic tourists by 2018
- Achieving a 10% annual growth in the number of business tourists by 2018
- Welcoming 1 million leisure tourists in Qatar by 2018, nearly half of whom primarily drawn by the country's cultural offering
- Reaching a total of \$4.2 billion in annual public and private sector tourism investments by 2018, while ensuring adequate levels of return on investment
- Ensuring sufficient supply of accommodation and healthy occupancy rates
- Enhancing QTA's operational efficiency through talent recruitment and retention, continued adherence to best-in-class practices and processes, and enhanced awareness of its roles and responsibilities

C. Diversification and Development of Qatar's Tourism Product & Service Portfolio

The National Tourism Sector Strategy 2030 carefully identified several areas that Qatar should focus on as part of reinforcing its tourism sector and capitalizing on the many exciting avenues of tourism the country has already begun building or has made considerable strides in.

These priority areas in which Qatar has a notable competitive edge include:

- **Culture:** Qatar can provide visitors the chance to embark on authentic experiences of the Qatari and Arab culture, with the country boasting awe-inspiring historical and heritage sites in addition to a compelling lineup of museums and contemporary art galleries to visit and enjoy.
- **Urban:** Visitors can enjoy the exceptional urban experiences of a bustling city that offers excellent shopping, entertainment, dining and relaxation opportunities for families and individuals.
- **MICE (Meetings, Incentives, Conferences, and Exhibitions):** A form of “business tourism”, visitors can come to Qatar to attend any of its year-round schedule of expos, shows, conferences and business events. With the country already hosting scores of international events and boasting first-class exhibition venues, Qatar is solidly carving for itself a place on the global map as a premium destination for MICE, driven in part by its exponential economic growth and its leading economic sectors.

Other areas the Strategy will similarly seek to promote include:

- **Sports:** Thanks to its one-of-a-kind sports facilities and its busy calendar of international sporting events, such as the annual Commercial Bank Qatar Masters, the Qatar ExxonMobil Open, the Commercial Bank Grand Prix, as well as the upcoming 2015 IHF Handball World Championships, and the biggest event of all, the 2022 FIFA World Cup, sport enthusiasts can expect to enjoy the experience of a lifetime in Qatar.
- **Sun & Beach:** Blessed with a year-round shining sun and some of the cleanest and unspoiled waters in the region, the country is set to become a haven for those looking to relax and enjoy the sun and beaches of Qatar and the many activities to be offered, from water sports and luxury cruises, to high-profile dhow races, all in a family-friendly setting that like none other.
- **Health & Wellness:** With its leading hospitals, and medical research facilities (including Sidra Medical and Research Center), and expanding healthcare and wellness centers, Qatar can strengthen its position as a premium destination for those looking for first-rate healthcare, Spas, and wellness services in the region.
- **Nature:** Qatar's wildlife, sprawling desert dunes, and pristine waters, coupled with the country's expanding natural reserves, render the country an ideal destination for visitors in search of serenity, adventure, or the perfect blend of both.
- **Education:** Being home to some of the world's leading universities, Qatar can offer visitors the chance to take advantage of its training and educational facilities, all in the context of a thriving and increasingly cosmopolitan city.

For each of these priority areas, the Strategy has identified a number of indicative programs, each translating into a series of projects, that will boost Qatar’s tourism offering and overall appeal to visitors.

The programs, which offer an opportunity for public and private sector entities to play a larger role in the tourism sector, will be supported by the various product development plans currently being developed, whether related to culture, urban, or MICE, among others.

The product development plans are part of a larger master plan that details the scope and areas in which all projects are to be developed, helping investors identify the many opportunities that exist and that they can be part of.

The programs and projects will require a total investment totaling between \$40 and \$45 billion, with investments going towards supporting the tourism infrastructure, building the numbers of accommodation rooms needed by 2030, and expanding on and promoting the country’s different tourism products.

Investments will be made by the Government but also by the private sector, whereby the financial viability of the proposed projects renders them particularly enticing to private investors and entrepreneurs.

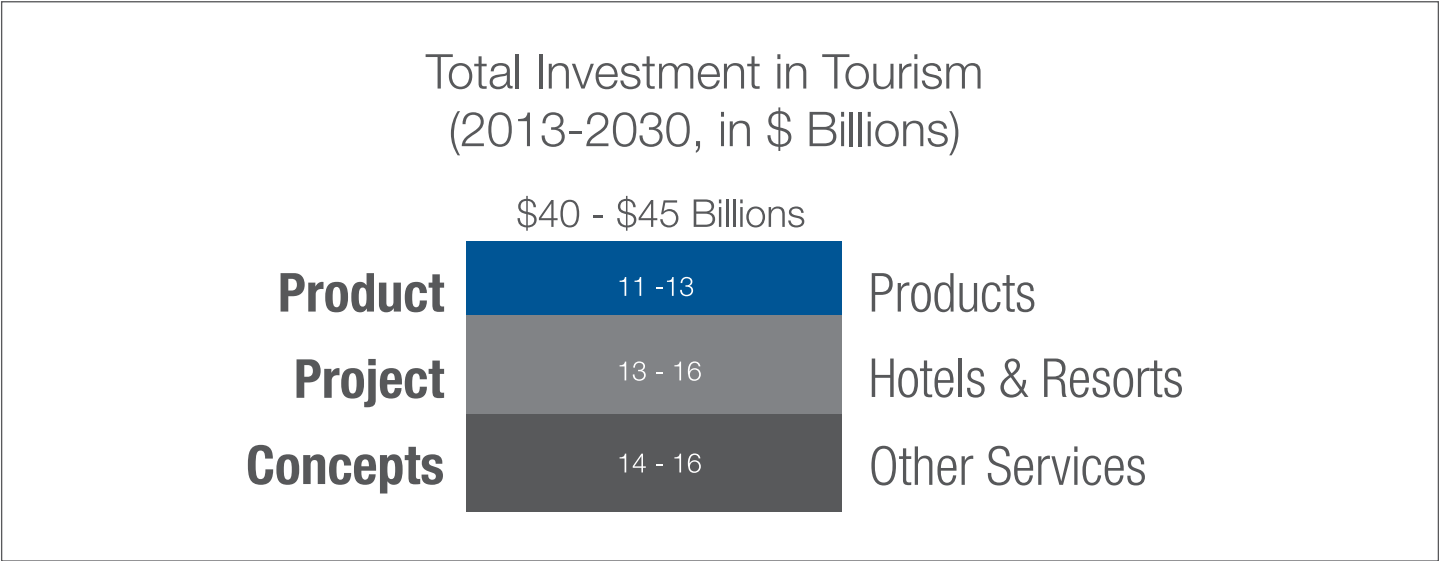
The below table identifies the high-impact programs to be implemented by 2018 as part of reinforcing Qatar’s tourism product offering.

Product	High-Impact Programs
Culture	Promote festivals and cultural events Encourage the development of local artistic talent
Urban	Establish a series of urban development projects
MICE	Develop the incentives component of MICE Increase the number of exhibitions hosted by at least 20/year Increase the number of conventions hosted to at least 30/year Enhance Qatar’s position as a destination for regional corporate meetings
Sports	Develop centralized sports calendar & ticketing services Improve sports fans’ journey
Sun & Beach	Develop and refurbish Qatar’s public beaches
Health & Wellness	Develop health and wellness products and services
Nature	Establish eco-tourism products and services
Education	Develop short-term/executive education courses and professional training programs

The below table provides an overview of some of the projects to be implemented by 2030 as part of reinforcing Qatar’s tourism product offering, along with the investments needed for each and the part of public investments in them.

Product	Project Examples	Required Investment (USD Bn)	% Public Investment
Culture	Develop multicultural events and markets	5.7	75%
Urban	Develop a wide range of entertainment options	2.7	50%
MICE	Continue developing convention centers and related exhibition infrastructure	1.3	50%
Sports	Continue developing tourism-related sports infrastructure	0.2	80%
Sun & Beach	Develop family-friendly beach resorts and organize luxury cruises	0.1	40%
Health & Wellness	Develop a series of wellness resorts	1.0	5%
Nature	Develop eco-tourism camping & desert activities	0.7	25%
Education	Develop training facilities & offer related programs	0.1	50%
		Total = ~ 11.5 Billion	

The below table identifies the breakdown in the total investments needed to implement the Strategy’s programs and projects by 2030



D. Optimal Market Mix

I. Optimal Mix of Tourism Segments

Based, in part, on the tourism products chosen for Qatar's competitiveness in them, the National Tourism Sector Strategy 2030 has identified priority segments of tourists to draw to Qatar, all while accounting for the need to ensure social sustainability:

- **Business tourists**, i.e. business professionals traveling for corporate incentives, meetings, or conferences and events
- **Arab tourists seeking comfort and wellbeing**, i.e. well-off families and couples seeking relaxation and comfort in luxurious settings
- **Arab families seeking leisure and entertainment**, i.e. families seeking entertainment in a well-catered destination in which each member of the family can find corresponding opportunities for leisure and recreation
- **Wealthy world travelers**, i.e. experienced high-income travelers looking for unique and authentic destinations
- **Authentic discoverers**, i.e. experienced travelers seeking to explore new destinations and cultures
- **Arab budget-conscious tourists seeking comfort**, i.e. price sensitive travelers who value their comfort

Other types of tourists who Qatar will work on attracting to the country include:

- **Non-Arab tourists seeking comfort and wellbeing**
- **Arab families seeking leisure and entertainment**
- **Non-Arab budget-conscious tourists seeking comfort**
- **Full care seniors**, i.e. seniors looking to relax in warm and sunny destinations and enjoy organized activities
- **Sports and entertainment enthusiasts**, i.e. young travelers who enjoy sports and entertainment
- **Nature lovers**, i.e. active travelers passionate about nature and who enjoy outdoor activities

II. Optimal Mix of Outbound Tourism Markets

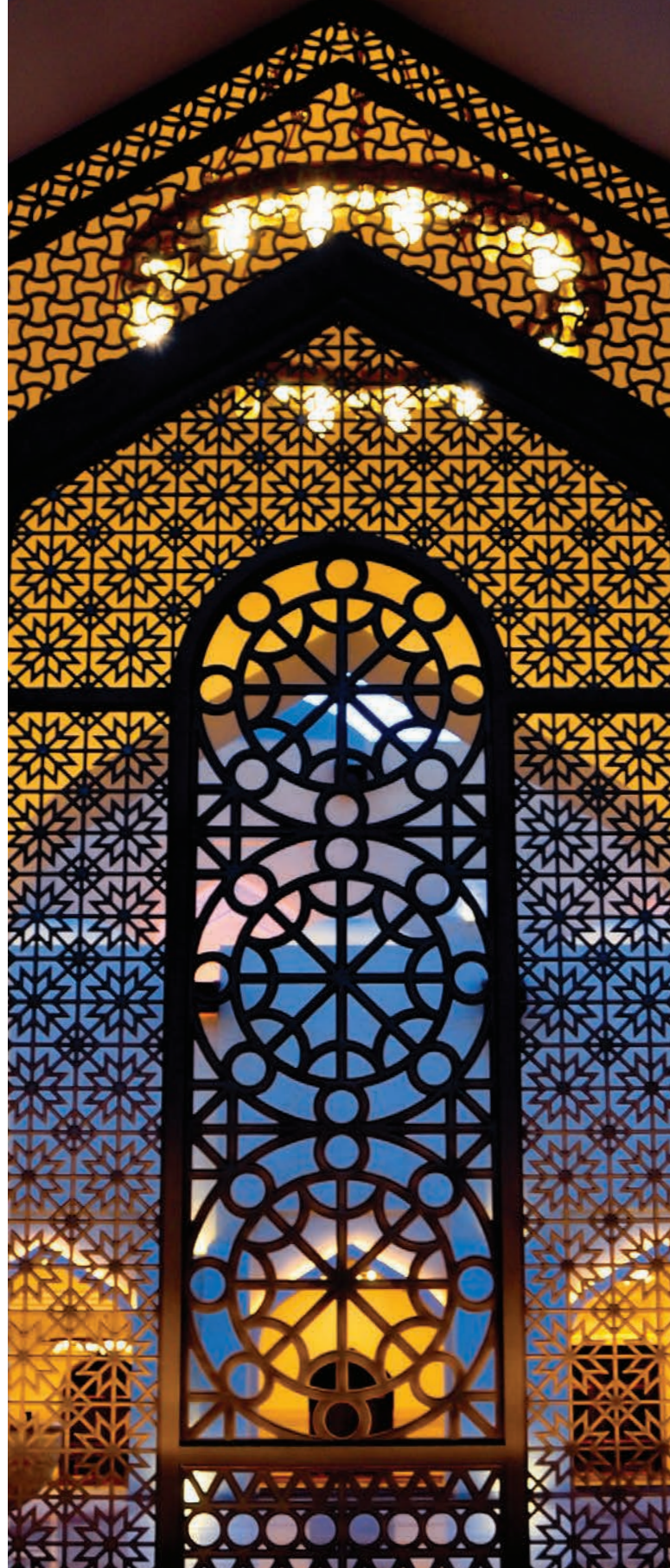
The National Tourism Sector Strategies 2030 has identified a number of primary markets from which to attract tourists, based on a mix of factors, including:

- The size of their country's outbound market, i.e. the proportion of the local population that tends to travel outside of the country on a regular basis and the frequency of such travels
- Their geographical distance from Qatar, in terms of the number of flight hours needed to reach Qatar from these destinations
- The appeal of Qatar's tourism offering/products to their country's population
- The compatibility/fit of their population with the Strategy's identified tourism segments to draw to Qatar.

Future changes in any of these factors and evolving macro-economic conditions will be accounted for in re-shifting the focus of the Strategy's primary markets if need be.

In each of the identified markets, QTA will be establishing local offices to help promote Qatar as a destination of choice.

Naturally, Qatar's hospitality will as always be extended to people from all corners of the world, whereby the country will continue to welcome all types of visitors besides those shortlisted in the Strategy.



Where will the Strategy be Implemented?

In line with the guiding principles upon which it was developed, the National Tourism Sector Strategy 2030 will ensure that all areas of Qatar will benefit from greater investments and an increase in tourism.

Accordingly, various tourism-related projects will be set up outside of Doha and in all of the country's municipalities.

This, in turn, will help reduce internal migration to Doha by creating more economic opportunities in areas outside of the capital, as well as by offering a wider choice of leisure and recreational activities across all of Qatar.

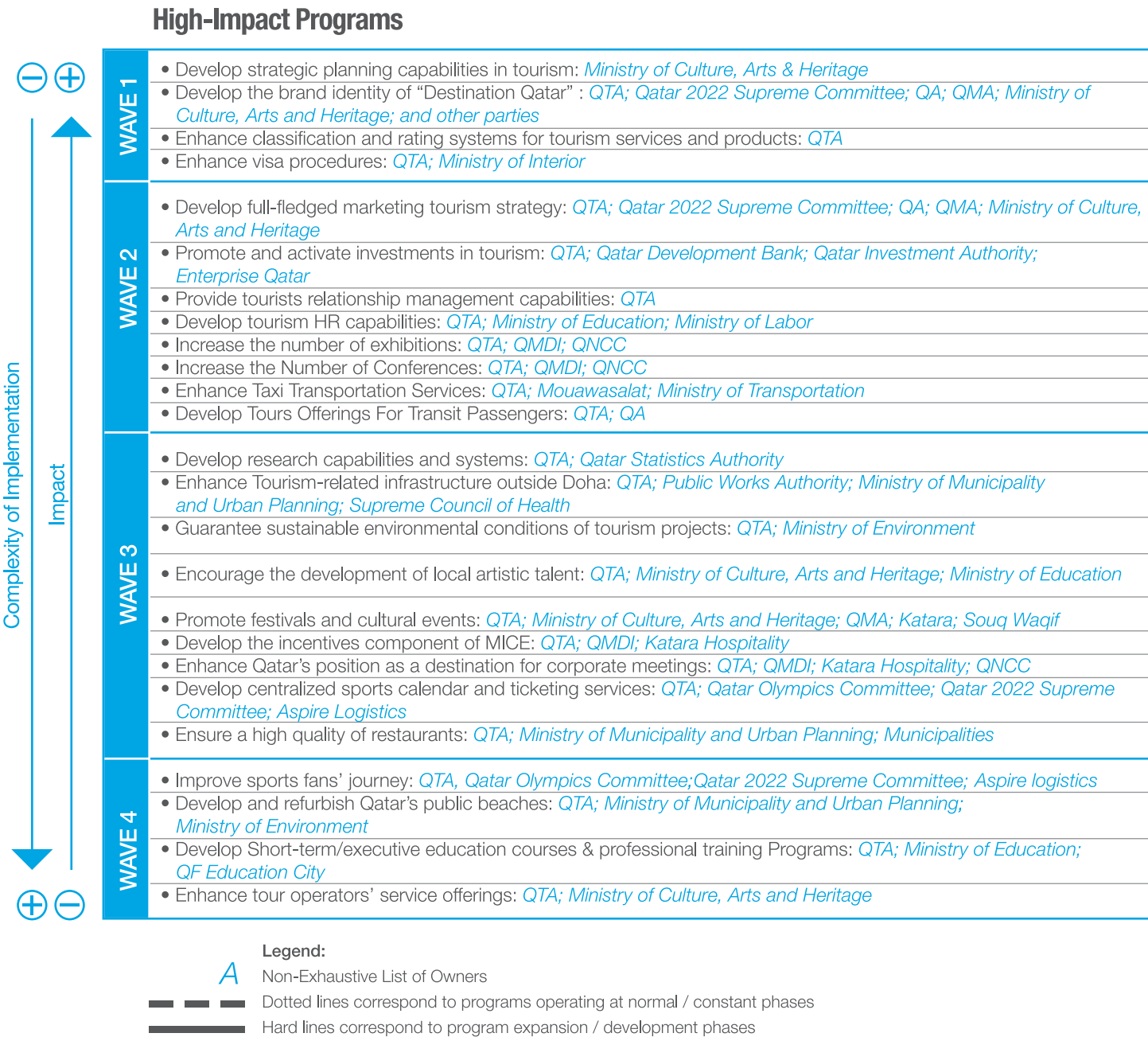




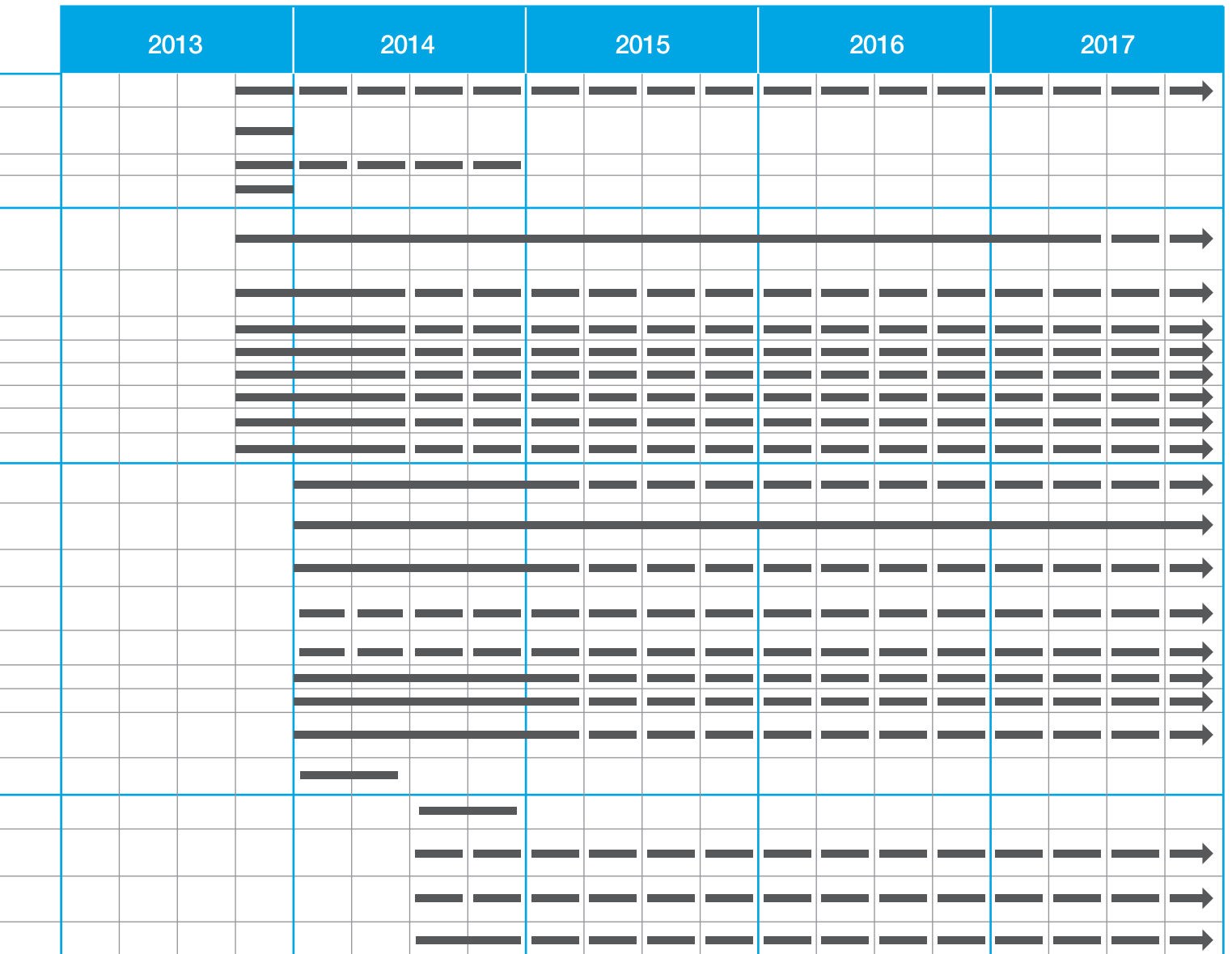
When will the Strategy be Implemented?

Though a 2030 Strategy, many of the programs and projects of the National Tourism Sector Strategy 2030 will see the light in the next short years, ensuring that Qataris will reap the benefits of the Strategy in the short and medium term as well.

Key performance indicators (KPIs) will help monitor and assess the efficient implementation of the Strategy and its programs and projects, allowing to roll out corrective measures whenever needed.



High-Impact Programs Timeline



Who will be Implementing the Strategy?

QTA led the development of the Strategy and will monitor its implementation as part of its role as the entity in charge of planning, regulating, and promoting sustainable tourism in Qatar.

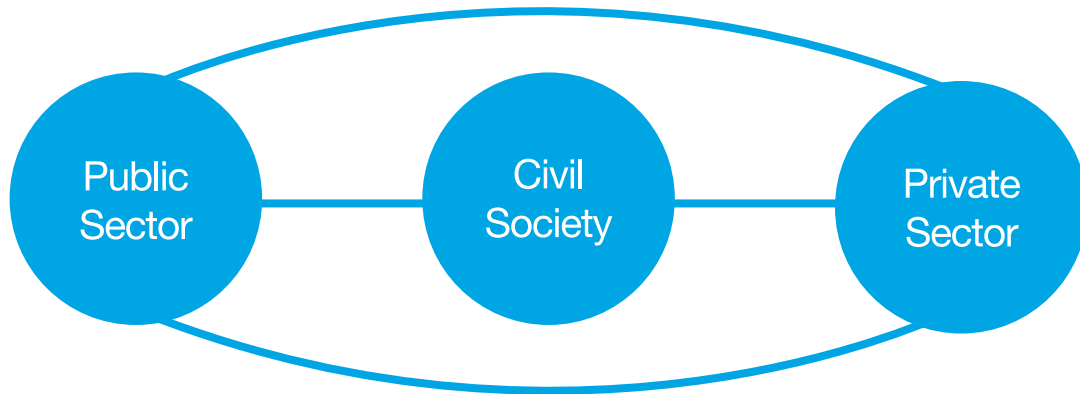
The Authority will therefore closely collaborate with all entities, whether from the public or the private sector, to ensure the successful roll-out of the Strategy, recommending corrective measures when needed and ensuring that all programs and projects are developed according to the stated objectives.



“With a firm plan of action in place, the real work is still ahead of us. Investments have to be made. Efforts have to be expended. And each one of us is responsible for the success of the Strategy in our own way. After all, this is a plan developed for Qatar by Qataris”.

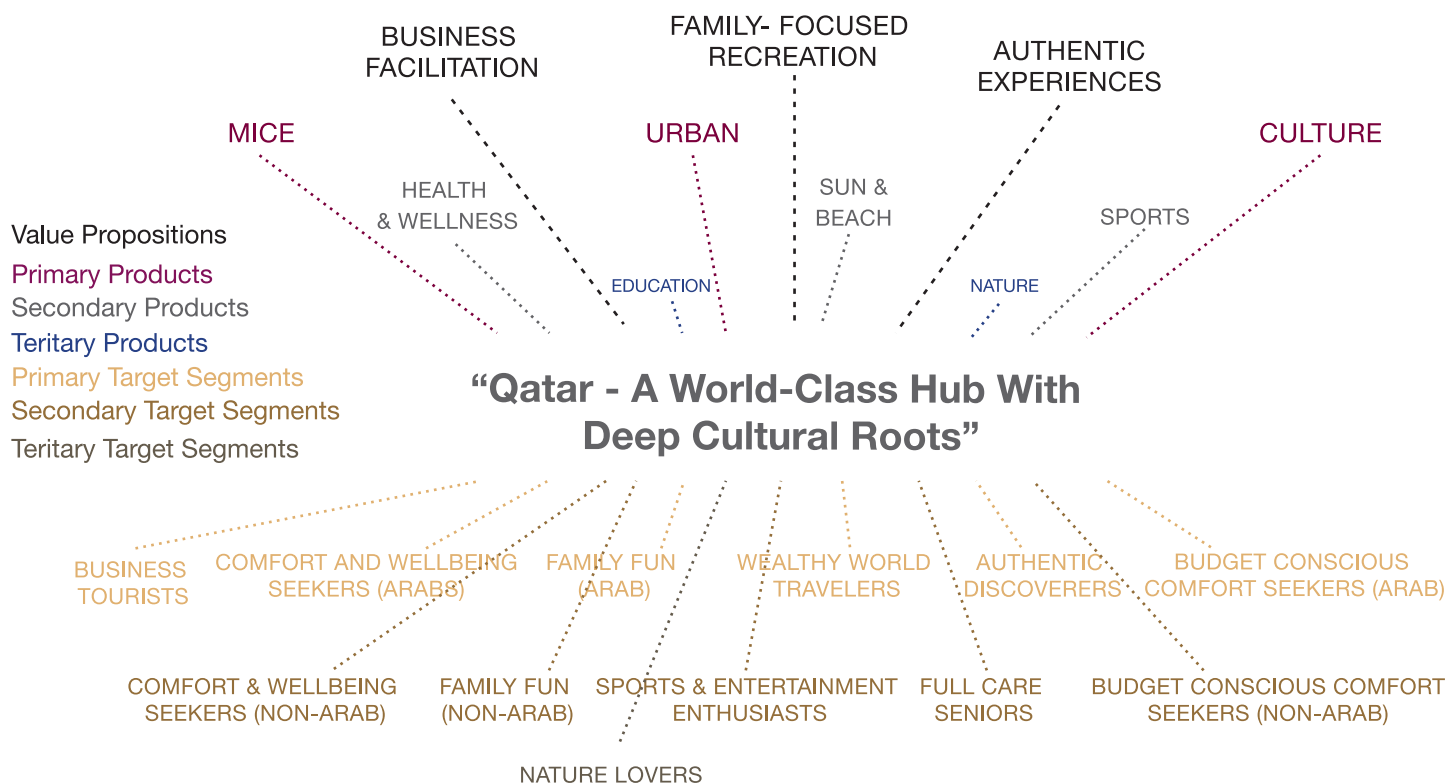
Hassan Al Ibrahim
Strategy Director – QTA

QTA's role is thus on the advisory, supervisory, and coordination level, with the execution of all programs and projects to fall under the mandate of the respective Government entities, in partnership with the private sector.



*“To Lead the Sustainable
Development of Qatar into
A World Class Hub With
Deep Cultural Roots”.*

QTA Vision Statment









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