



Shaping the Future of Tourism: Qatar's Hospitality Sector

West Bay Beaches & Al Safliya Island: Unlocking Qatar's Next Iconic Tourism Destination

October 2025

Prepared by KPMG in Qatar





Contents

01

**An Overview of Qatar's
Hospitality & Tourism
Sector**

Page 04

02

**Key Trends in Hospitality
Sector & Tourism**

Page 11

03

**The West Bay Beaches &
Al Safliya Island
Development Project**

Page 17

04

Way Forward

Page 31

Foreword

Qatar's hospitality and tourism sector has rapidly evolved from its early foundations into a diverse, world-class industry that competes on a global stage. Over the years, the sector has balanced cultural heritage with modern innovation, expanding its offerings to include a wide spectrum of experiences that attract visitors from across the world. Major milestones such as the hosting of international events have accelerated this growth, reinforcing the country's reputation as a hub for tourism, leisure, and culture.

Today, the sector continues to diversify around emerging themes such as sports tourism, eco-sustainability, heritage exploration, and leisure experiences. Future projects are being shaped through innovative partnerships and long-term planning, ensuring alignment with national development goals. **Together, these efforts highlight a vision of inclusivity, sustainability, and global relevance, positioning Qatar as a destination where tradition and modernity come together to create a visitor experience that is not only unique to Qatar, but also benchmarked against the best in the world.**



Venkat Krishnaswamy
Partner
Head of Advisory
KPMG in Qatar



Sayantan Pande
Director, Head of Infrastructure
& Real Estate Advisory
KPMG in Qatar

01

An Overview of Qatar's Hospitality & Tourism Sector





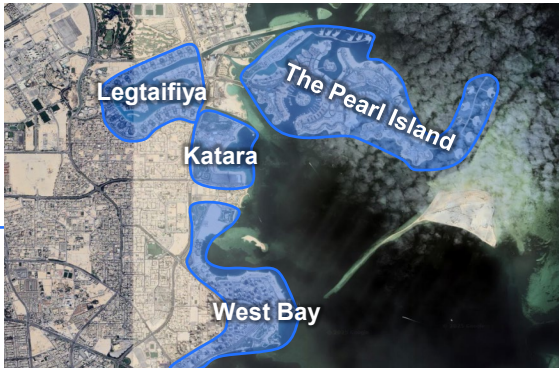
Qatar's Hospitality & Tourism – Two decades of transformation & growth

Qatar's hospitality and tourism sector has undergone a rapid transformation over the past two decades, evolving from foundational projects into a diversified portfolio of world-class destinations

2005



2025



2005 to 2010

This period marked the foundations of modern tourism, with the redevelopment of the Corniche, restoration of Souq Waqif, and rise of Doha's iconic skyline. Landmark destinations such as The Pearl Island and Katara Cultural Village positioned Qatar as a new cultural and leisure hub in the region.

2011 to 2015

This period marked the expansion of luxury resorts and island destinations. Banana Island Resort and Marsa Malaz Kempinski opened, while MIA Park became a central leisure space and Lusail Marina signaled the city's growth.

2016 to 2020

Large-scale cultural and urban projects defined these years. The National Museum of Qatar opened in 2019, Lusail City advanced with its marina and boulevard, and the groundwork was laid for expanding Qatar's hospitality portfolio. Shopping and entertainment destinations such as Mall of Qatar and Doha Festival City (DFC) opened during this period, enhancing Qatar's retail and leisure offerings

2021 to 2025+

The FIFA World Cup 2022 catalyzed unprecedented transformation, with projects such as Katara Towers, Hilton Salwa Resort, and Qetaifan Island redefining Qatar's global tourism profile. Sports developments, including Lusail Stadium, Stadium 974 and Formula 1 further strengthened Qatar's positioning as a sports tourism hub.

Source: Qatar Tourism, KPMG Research & Analysis

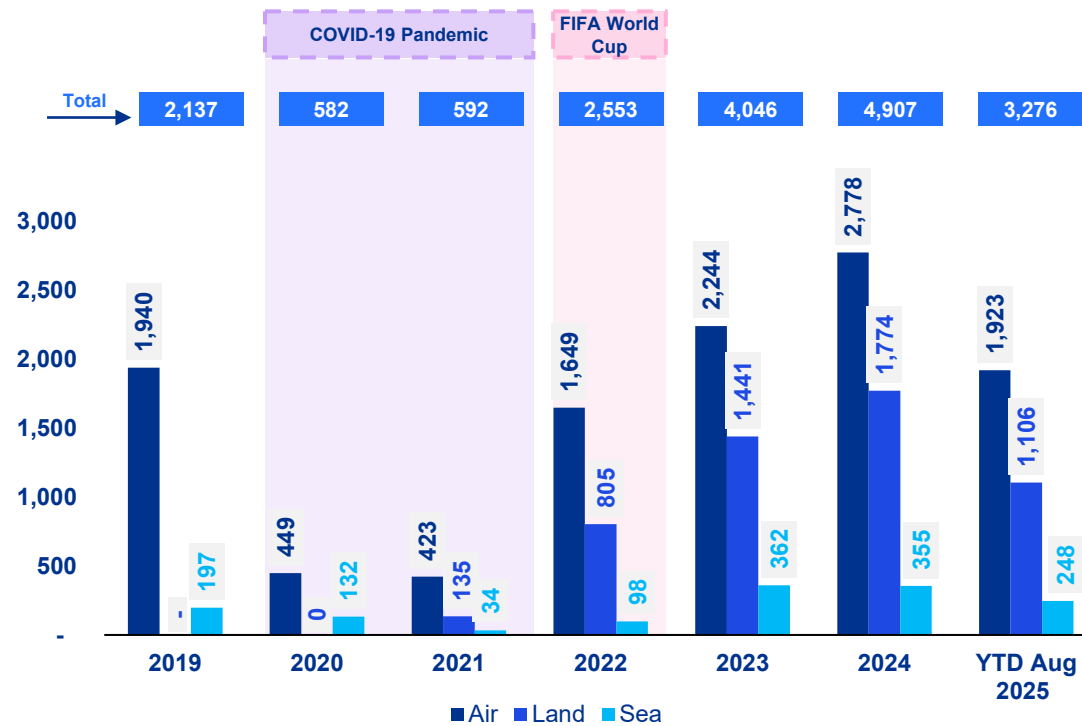




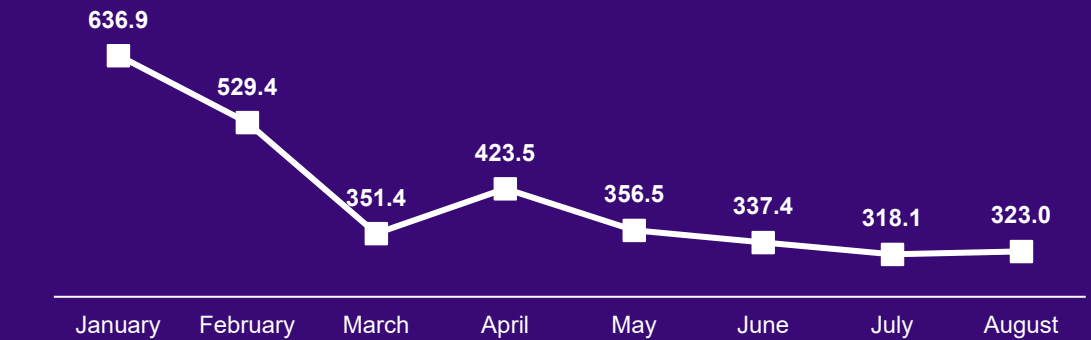
Qatar's international arrivals show steady momentum across entry modes

International Arrivals over the Years (in thousands)

On average, 63% of international arrivals between 2019 and YTD Aug 2025 entered Qatar by air, making it the most popular mode of entry throughout the period



International Arrivals in 2025 (in thousands)



As of YTD Aug 2025, Qatar welcomed nearly 3.3 million international arrivals.



Air arrivals represented **58.7% of total arrivals**



Land arrivals were the second most utilized mode of entry, **making up 33.7% of total arrivals**



Sea arrivals accounted for the remaining **7.6% of total arrivals**

Source: Qatar Tourism, KPMG Research & Analysis

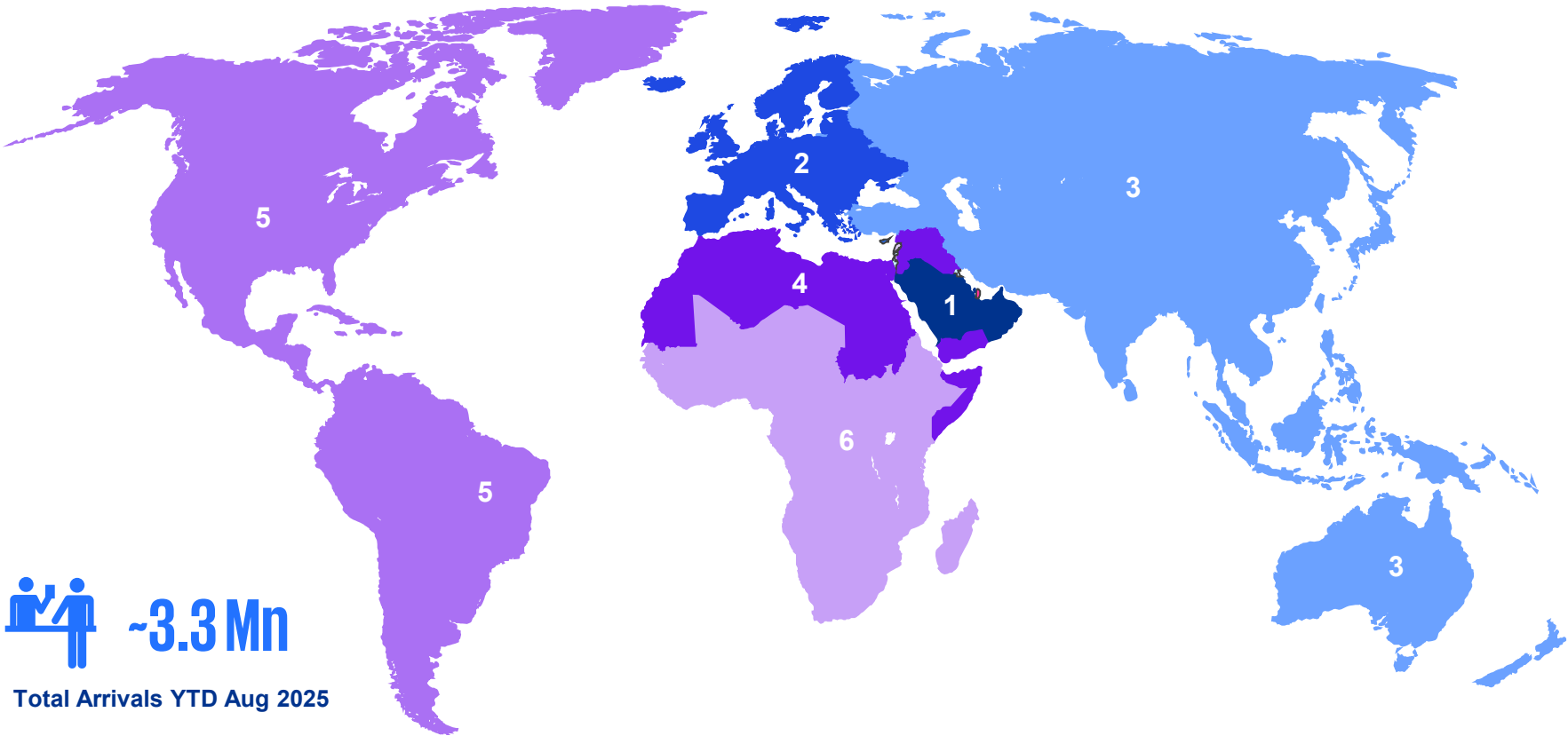


© 2025 KPMG LLC, a limited liability company registered with Qatar Financial Centre Authority (QFCA), State of Qatar and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.



Ranking of tourist arrival by region

In YTD Aug 2025, Qatar recorded ~3.3 million international arrivals, with the majority coming from the GCC (36.8%), followed by Europe (24.6%) and Other Asia including Oceania (21.8%)



Arrivals Distribution by Region (YTD Aug 2025)

| | | |
|-------|------------------------------------|----|
| 36.8% | Gulf Cooperation Council Countries | 01 |
| 24.6% | Europe | 02 |
| 21.8% | Other Asia, including Oceania | 03 |
| 7.2% | Other Arab | 04 |
| 6.9% | Americas | 05 |
| 2.7% | Other Africa | 06 |

Source: Qatar Tourism, KPMG Research & Analysis





Hotel room supply reflects Qatar's premium positioning

Type of Accommodation



5-Star Hotels

Luxury & upper upscale properties offering premium facilities, exceptional service, and extensive amenities



4-Star Hotels

Upscale hotel with high comfort, quality service, and a wide range of facilities



3-Star Hotels

Mid-range hotel providing comfortable accommodation and essential services



2 & 1-Star Hotels

Budget-friendly hotels offering basic facilities and limited services

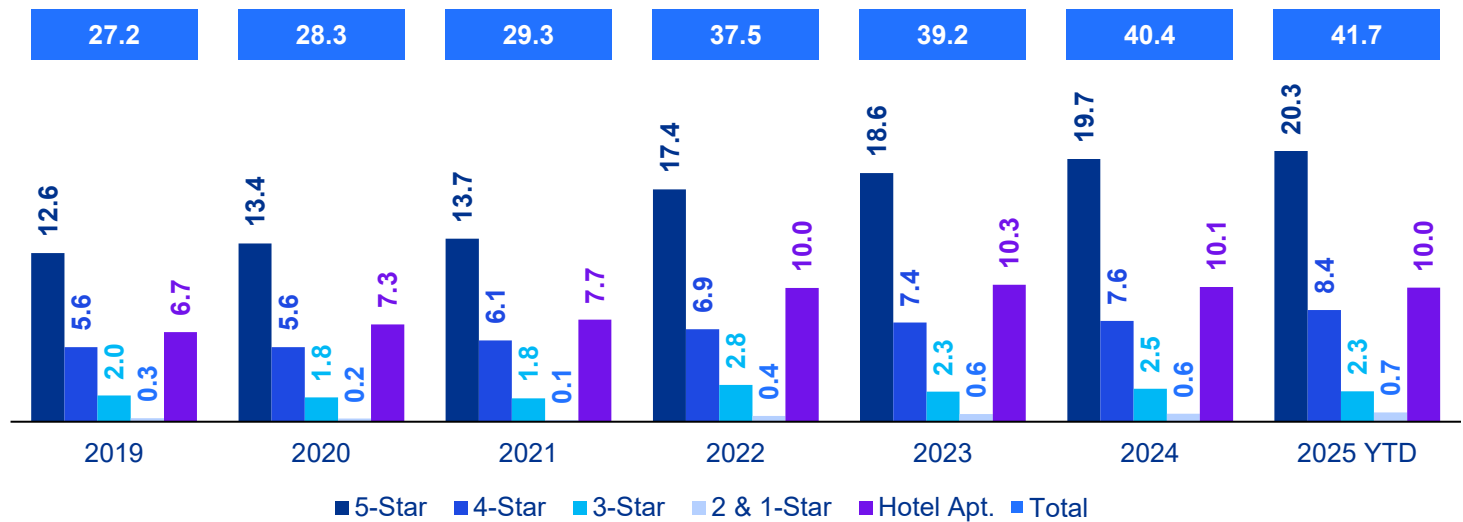


Hotel Apartments

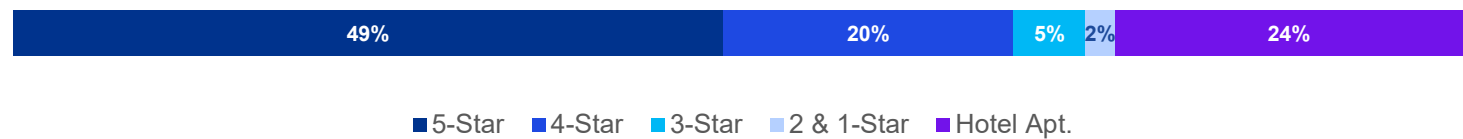
Combine hotel services with apartment-style living; includes standard and luxury options

Supply in Number of Hotel Rooms from 2019 to YTD Aug 2025 (in thousands)

Nearly half of Qatar's hotel supply is 5-star, underscoring its luxury-driven market positioning



Average Distribution by Accommodation Type 2025 Aug YTD



Source: Qatar Tourism, KPMG Research & Analysis

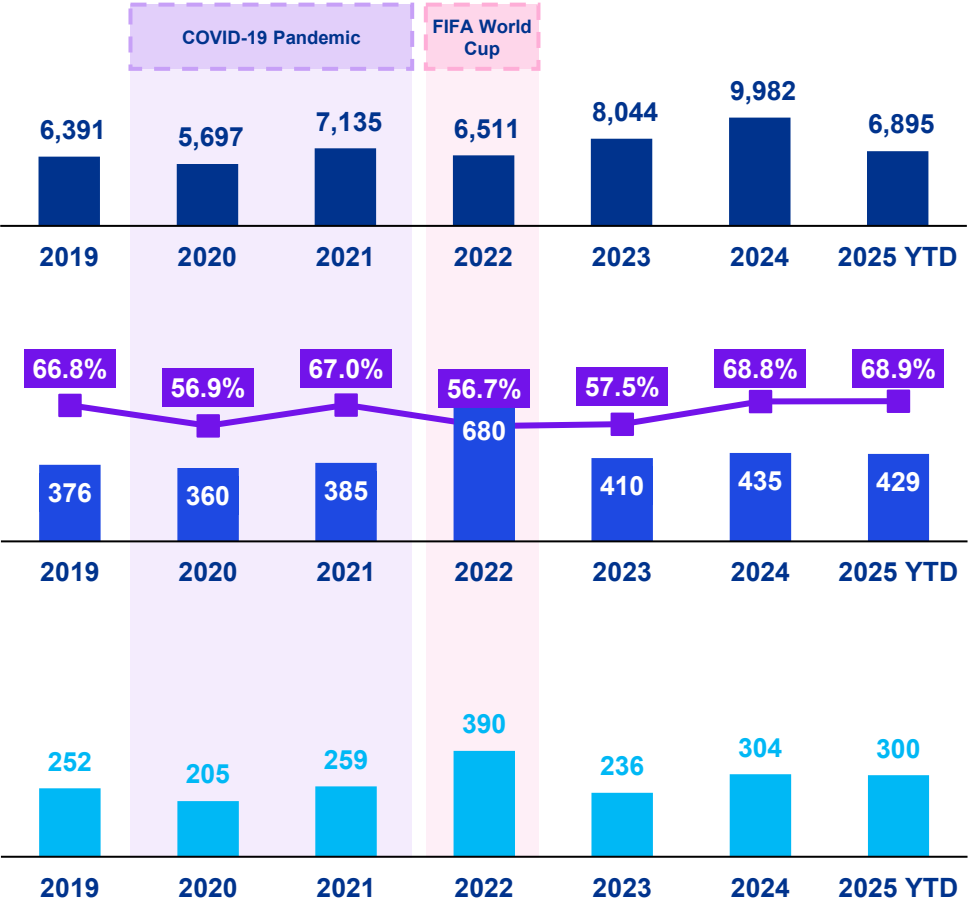




Qatar's hospitality market remains stable



Room nights
(in thousands)



Occupancy (%) &
Average Daily Rate
(ADR, in QAR)



Revenue Per Available
Room (RevPAR, in QAR)

Performance from 2019 to YTD Aug 2025

- Qatar's hospitality sector rebounded steadily post-pandemic, supported by new events, attractions, and tourism initiatives.
- The 2022 FIFA World Cup drove a record 76% surge in ADR to QAR 680, marking a pivotal year for Qatar's global positioning.
- Post-2022, the market stabilized with ADR and RevPAR remaining above pre-World Cup levels amid steady growth in visitor arrivals.
- As of YTD Aug 2025, occupancy stands at ~69%, ADR at QAR 429, and RevPAR at QAR 300, reflecting a resilient performance.

Source: Qatar Tourism, KPMG Research & Analysis

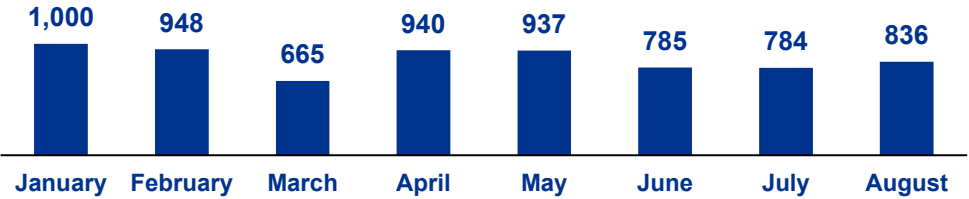




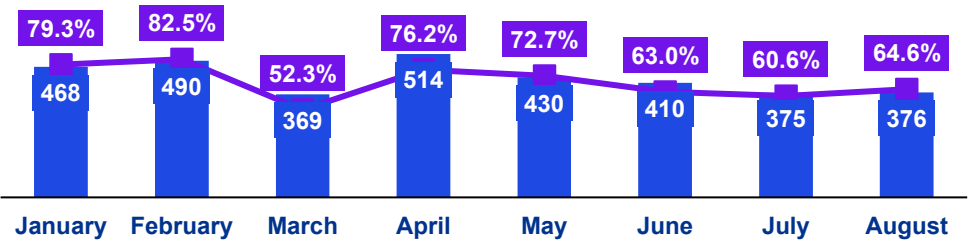
Tourism demand remains robust in 2025 with growth holding steady



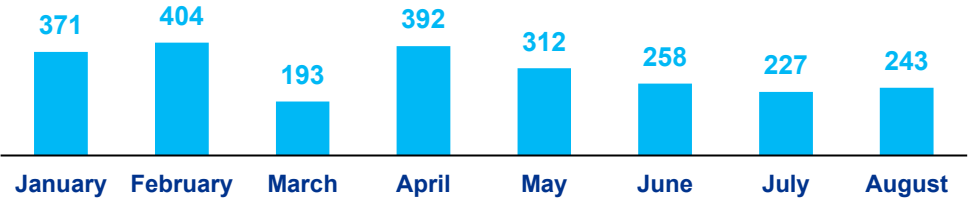
Room nights
(in thousands)



Occupancy (%) &
Average Daily Rate
(ADR, in QAR)



Revenue Per Available
Room (RevPAR, in QAR)



Performance in 2025

- As of YTD Aug 2025, Qatar's hospitality sector continues to sustain strong momentum.
- February posted the strongest results, with occupancy at 82.5% and ADR at QAR 490, driven by favorable winter weather and major events such as the Global Champions Arabians Tour and the Web Summit. January and April also benefited from the pleasant climate, sustaining occupancy levels above 76%.
- March saw the sharpest dip, with occupancy falling to 52.3% and ADR to QAR 369, reflecting muted demand during Ramadan, when shorter business hours and fewer leisure activities typically curb travel.
- From May to August, the market cooled, with RevPAR easing to QAR 243 in August, reflecting the off-peak summer period when high temperatures typically reduce travel in the region.

Source: Qatar Tourism, KPMG Research & Analysis



© 2025 KPMG LLC, a limited liability company registered with Qatar Financial Centre Authority (QFCA), State of Qatar and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

02

Key Trends in Hospitality Sector & Tourism



Expanding beyond traditional tourism – Meeting global traveler needs

Tourism today is no longer defined by a single experience but by a spectrum of segments that cater to different traveler motivations. From sports and eco-conscious tourism to adventure, heritage, leisure, and staycations, the sector is evolving to meet diverse preferences. These segments collectively strengthen Qatar's positioning as a diverse, year-round destination, appealing to international, regional, and domestic travelers.

| Sports Tourism  | Sustainable & Eco-Tourism  | Adventure & Heritage Tourism  | Leisure Travel & Staycations  |
|--|--|--|---|
| <ul style="list-style-type: none">• Travel centered on watching or participating in sporting events, from global tournaments to niche competitions and active holidays.• Generates high economic impact by attracting international audiences, stimulating infrastructure development, and boosting destination branding.• Enhances a destination's international visibility by associating it with globally recognized events and sports culture. | <ul style="list-style-type: none">• Tourism that prioritizes environmental preservation, resource efficiency, and respect for local ecosystems and communities.• Often linked to eco-lodges, nature-based experiences, and cultural programs that emphasize sustainability and responsible travel.• Integrates education and engagement, offering travelers a deeper awareness of sustainability issues. | <ul style="list-style-type: none">• Combines outdoor activities (hiking, safaris, diving) with exploration of cultural and historical.• Appeals to travelers seeking immersive experiences that balance physical activity with authentic encounters and cultural discovery.• Contributes to preserving cultural identity and heritage by channeling tourism revenue into conservation and local communities. | <ul style="list-style-type: none">• Tourism focused on relaxation, recreation, and lifestyle, including short getaways, resort stays, and wellness retreats.• Popular among travelers seeking convenience, affordability, and curated luxury or family-oriented experiences.• Grows in popularity during economic downturns or travel restrictions, as people seek closer, more affordable options. |

Source: KPMG Research & Analysis

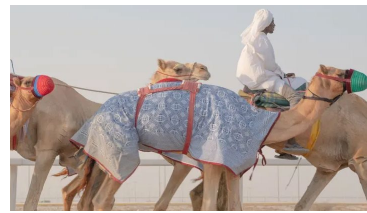
Sports tourism in Qatar – Tradition meets global spectacle

Sport lies at the heart of Qatar's identity, blending age-old traditions with world-class contemporary events. This unique mix of heritage and modern competition has cemented Qatar's reputation as both a guardian of tradition and a global sporting hub.

Traditional Sports



Horse Racing



Camel Racing

Falconry



Contemporary Sports



Football

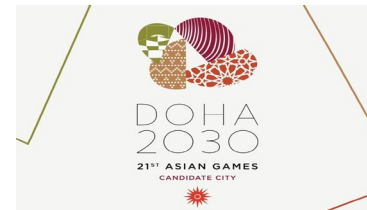


FIFA World Cup



F1 Qatar Grand Prix

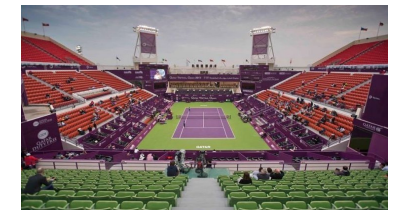
Asian Games



Basketball



Tennis



Source: Qatar Tourism, KPMG Research & Analysis

Eco-tourism in Qatar – Exploring Land, Sea & Wildlife

Qatar's diverse natural landscapes offer unique opportunities for eco-tourism, ranging from protected land habitats to rich marine ecosystems and native wildlife.

Terrestrial Environment



- Involves development and conservation of natural land-based sites such as mangroves, caves, dunes, and other protected landscapes
- Prioritizes sustainable infrastructure improvements and site access, aligning eco-tourism with climate resilience goals

Marine Environment



- Encompasses Qatar's coastal areas, territorial waters, and islands, with efforts to expand marine reserves and protected zones
- Offers low-impact tourism activities like kayaking and snorkeling, matched with marine conservation initiatives for ecosystems like coral reefs

Wildlife



- Focuses on safeguarding native species, including the Arabian Oryx, birds, endangered marine life (like green turtles and dugongs), and desert fauna.
- Emphasizes biodiversity protection and habitat preservation through educational and community-centered conservation efforts

Dahl Al Misifr Cave



Mangrove Park

Al Safliya Island



Coral Reefs

Arabian Oryx



Dugong

Source: Qatar Tourism, KPMG Research & Analysis

Adventure & Heritage – Dual pillars of Qatar's tourism

Adventure Tourism



Desert Excursions

Experiences include dune bashing, sandboarding, and ATV/buggy rides across Qatar's sands and the Inland Sea



Water-Based Activities

Kayaking in the mangroves, parasailing, kitesurfing, scuba diving, jet-skiing, and speedboat adventures offer exposure to Qatar's coastal beauty



Airborne Activities

Hot-air balloon flights at sunrise/sunset and paratrike tours offering panoramic views of Qatar's landscapes



Unique Outdoor Activities

Desert camping, stargazing, and curated eco-adventure tours that combine exploration with cultural immersion

Heritage & Cultural Tourism

In addition to adrenaline-fueled adventures, Qatar offers deeply rooted opportunities for heritage exploration, where ancient traditions, archaeological sites, and cultural landmarks come together to reflect the nation's rich identity and history. Visitors are invited to experience the excitement of discovery and the authenticity of a culture that continues to shape everyday life.



UNESCO & Historical Landmarks

Sites such as the Al Zubarah Archaeological Site, the Al Jassasiya rock carvings, and Bin Gannam Island illustrate Qatar's early settlement patterns, trading activity, and cultural development



Traditional Architecture & Living History

Forts, towers, and farmsteads, including Al Rekayat Fort, provide examples of defensive structures and traditional building methods while offering insight into daily life in earlier periods

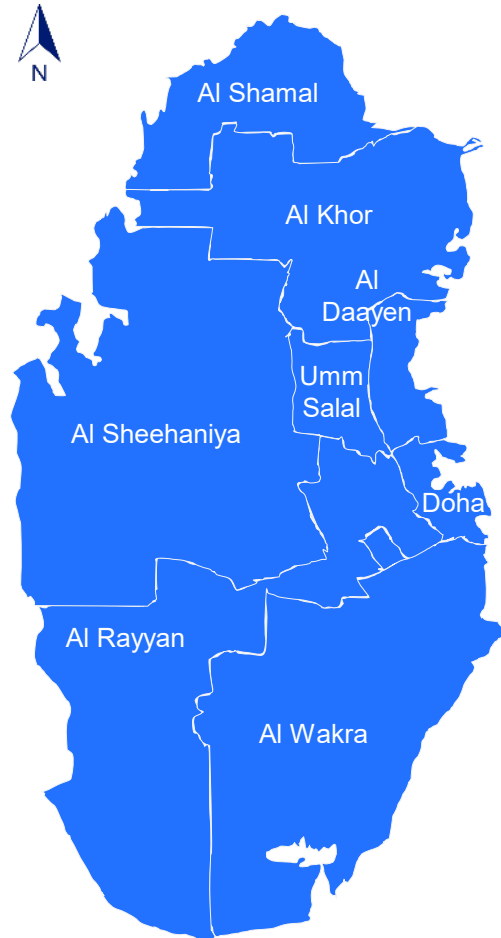


Markets & Cultural Settings

Places like Souq Waqif continue to function as commercial and social hubs, where local crafts, trade, and cultural practices remain visible and accessible to visitors

Source: Qatar Tourism, KPMG Research & Analysis

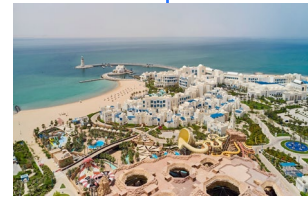
From resorts to city escapes – Qatar's leisure & staycation offerings



Resorts & Wellness



**Banana Island
Resort**



**Hilton Salwa Beach
Resort**



**Sharq Village & Spa
(Ritz-Carlton)**

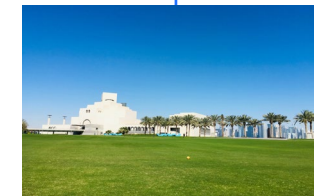
Prime Destinations



The Pearl Island



**Lusail Winter
Wonderland**



**Museum of Islamic
Art**

Untapped Potential: Leisure & Staycation Offerings

- Such developments bring year-round demand drivers that balance Qatar's tourism sector, particularly during weekends, holidays, and off-peak seasons, ensuring steadier performance.
- The segment holds considerable untapped potential, especially through developing tailored staycation packages for both international tourists and residents, families, couples, and young professionals, while also diversifying experiences beyond accommodation.
- By integrating wellness, recreation, dining, entertainment, adventure, and cultural activities into staycation offerings, Qatar can elevate these short breaks into comprehensive lifestyle experiences that strengthen domestic and regional demand.

Source: Qatar Tourism, KPMG Research & Analysis

03

The West Bay Beaches & Al Safliya Island Development Project





Capitalizing on opportunity – Qatar's leading new project

Qatar is positioned to spearhead new projects and initiatives that align with the latest trends shaping the hospitality and tourism sector

The West Bay Beaches & Al Safliya Island Development Project



Sustainable & Eco-Tourism

The project reflects Qatar's commitment to sustainability by transforming coastal and island environments into managed eco-friendly destinations, balancing development with conservation.



Leisure & Staycations

With offerings ranging from family beaches to luxury beach clubs, resorts, and dining, the development directly addresses rising demand for leisure tourism and staycation experiences.



Diversified Tourism & Public-Private Partnership (PPP) Model

By integrating entertainment and hospitality into a single destination and delivering it through a PPP model, the project aligns with global trends of diversified tourism development supported by private investment.

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis

Strategically positioned to deliver inclusive & high-impact destinations

The project spans five plots in Doha's West Bay along the Corniche and Al Safliya Island offshore. Based on private sector interest and Authority requirements, the plots may either be awarded to a single developer or allocated among multiple developers.

Project Objectives



Tourism & Leisure Development

Enhance recreational and tourism offerings along Doha's coastline and offshore destinations, while ensuring accessibility for all population segments, including differently abled individuals.



Economic & Social Impact

Increase private sector participation, create employment opportunities, stimulate local economic activity, and integrate Qatari culture and heritage through design, art, and architecture.



Environmental Sustainability

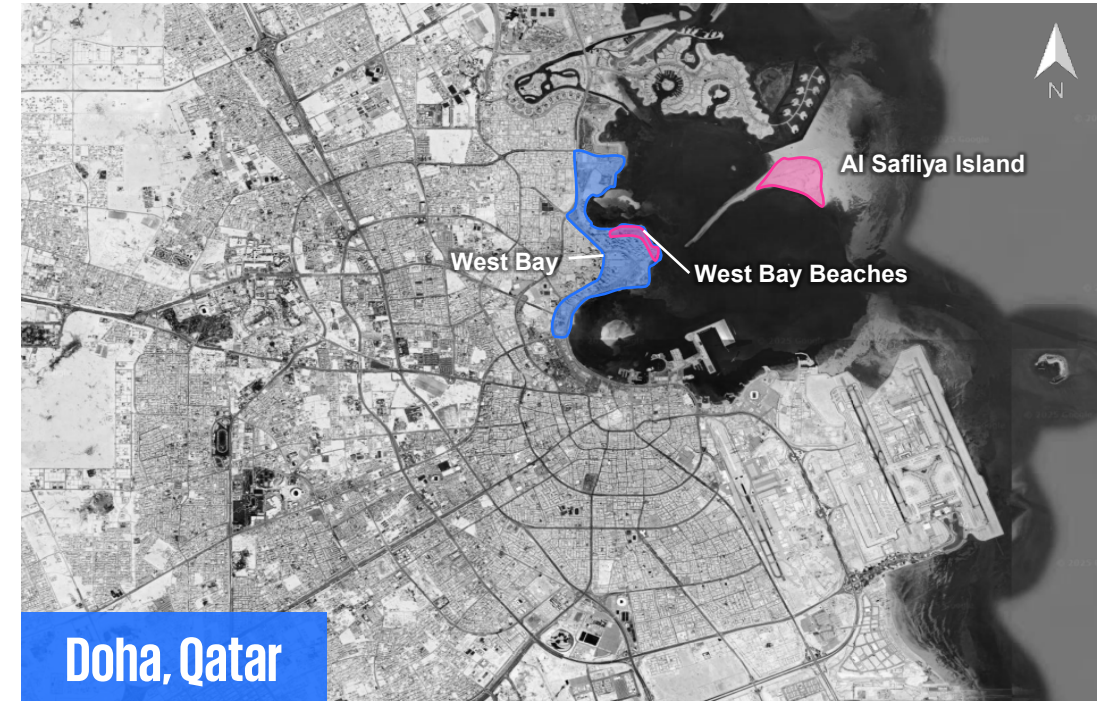
Develop eco-sensitive infrastructure that supports marine access, leisure, and hospitality, while promoting sustainability through green building principles and responsible coastal development.



Efficient Implementation

Leverage Qatar Tourism's direct ownership of the plots, enable differentiated beach concepts for diverse demographics, and utilize existing infrastructure to ensure swift and effective project delivery.

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis



Doha, Qatar

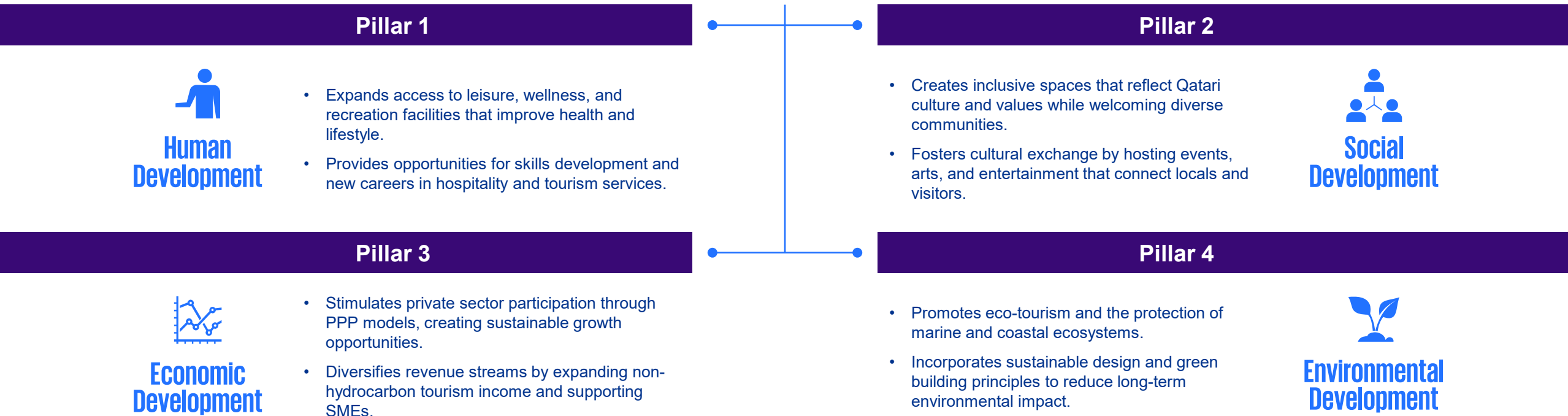
Location Overview

- The five beach plots are located in Doha's West Bay along the Corniche, adjacent to key business, hospitality, and cultural hubs.
- Al Safliya Island sits offshore to the east of West Bay, southeast of The Pearl Island and north of Hamad International Airport.

A masterplan contributing to the advancement of vision 2030 pillars

The West Bay Beaches and Al Safliya Island developments go beyond tourism, creating wide-ranging impacts across human, social, economic, and environmental dimensions. By enhancing quality of life, strengthening cultural identity, diversifying the economy, and embedding sustainability, they contribute directly to the objectives of Qatar National Vision 2030.

Contribution to the Four Pillars of the National Strategy Under Qatar's Vision 2030



Source: Government Communications Office, KPMG Research & Analysis

West Bay Beaches & Al Safliya Island – A project aligned with vision 2030

Qatar Tourism, as the contracting authority, is driving forward the development of the West Bay Beaches and Al Safliya Island project under a Public-Private Partnership (PPP) framework. Qatar Tourism has identified this project as a key opportunity for private sector participation, supporting the country's vision to diversify and expand its tourism assets.

Design Principles



Tourism Alignment

The project is conceptualized to be consistent with Qatar's tourism strategy by matching supply with demand and appealing to priority target markets



Inclusive Beach Offering

Beach areas are expected to provide options for all segments, from accessible, low-budget facilities to premium beach clubs



Connectivity & Accessibility

Infrastructure should ensure seamless links between West Bay Beaches and Al Safliya through shuttles, water taxis, and other networks



Cultural Integration

Qatari culture and heritage should be embedded in the project through art, architecture, and design elements



Regulatory Compliance

All relevant regulations must be carefully considered into the concept and design, such as orienting developments on Al Safliya Island toward the city



Distinct Market Positioning

Al Safliya Island is envisaged to deliver unique attractions, such as resorts, nightlife, and water-based recreation, catering to both families and adults



Customer-Centric Design

Visitor satisfaction must be prioritized at every stage of the experience, from arrival to departure



Environmental Sustainability

The development must adopt green building standards and prioritize sustainable operations to protect natural ecosystems

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis

Diverse facilities offered under a PPP structure

The development is being tendered under a PPP structure that leverages private expertise and efficiency while aligning with Qatar Tourism's long-term strategy and the objectives of Qatar National Vision 2030.

Project Facilities

The project is conceptualized to provide a wide range of facilities catering to visitors of all ages and backgrounds, ensuring an inclusive and distinctive experience



Accommodation



Recreation



Luxury Beach Clubs



Leisure



Family Space



Sports



Dining



Sustainable Tourism

Commercial Terms



Project Company's Responsibility

The project company will assume full responsibility for financing, designing, constructing, and operating the assets under the concession agreement.



Project Term

The Concession Agreement and Concession Tenure are expected to have an initial term of 25 years.



Revenue Generation & Commercial Rights

The project company is responsible for developing and operating the facilities in a manner that allows revenue generation from permitted commercial activities.



Revenue Risk & Risk Allocation

No minimum revenue guarantees or subsidies will be provided by the authority, and the project company will assume full demand and revenue risk.



Sub-leasing and Third-Party Operators

The concessionaire may allocate parts of the site or contract third-party operators to deliver specialized services.



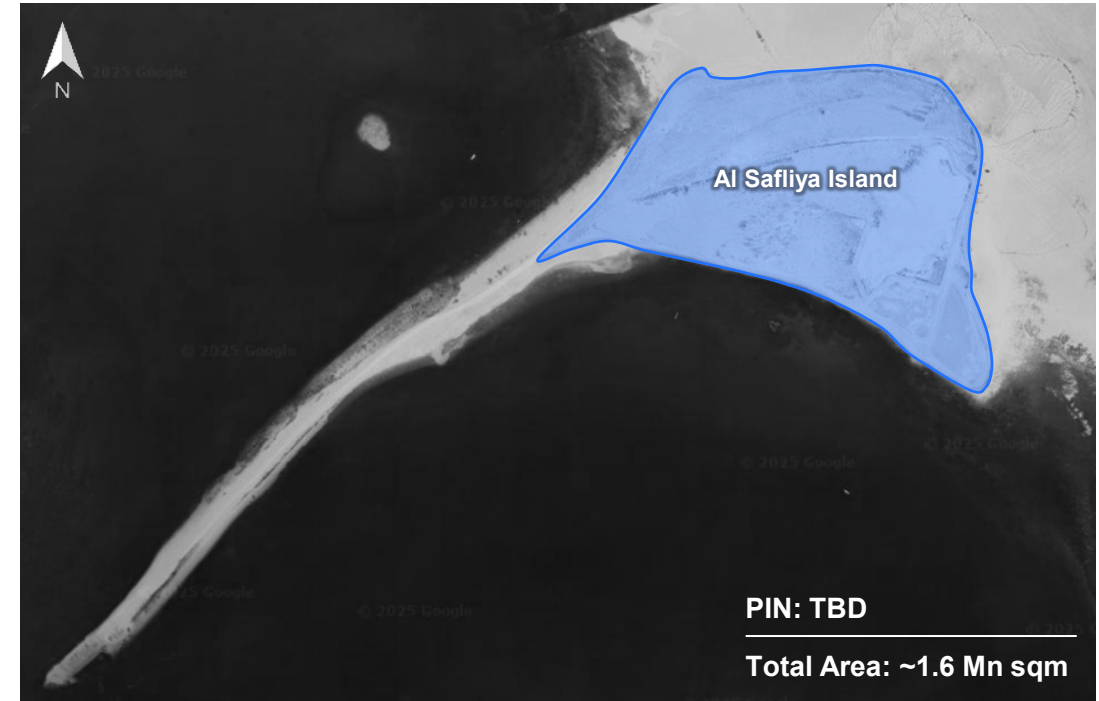
Hand-back Criteria

Upon expiry or early termination of the Concession Agreement and/or lease, all facilities shall be transferred to the contracting authority, and the land to the State of Qatar.

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis



Overview of the project plots offering development opportunities



Beachfront Plots

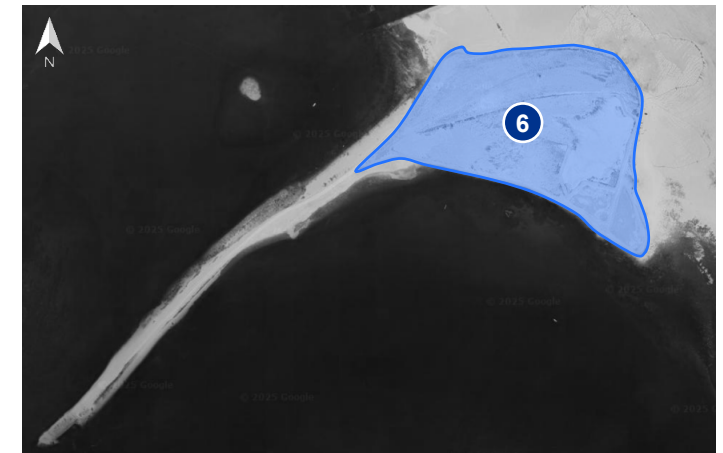
| | | | | | | | | | |
|-----------|--|-----------|--|-----------|--|-----------|--|-----------|---------------------------------------|
| 01 | PIN: 61080131 Land Area: 22,286 sqm | 02 | PIN: 61080127 Land Area: 56,512 sqm | 03 | PIN: 61080132 Land Area: 13,483 sqm | 04 | PIN: 61080120 Land Area: 14,800 sqm | 05 | PIN: 61080074 Land Area: 8,000 sqm |
|-----------|--|-----------|--|-----------|--|-----------|--|-----------|---------------------------------------|

Source: Qatar Tourism, Ashghal, GIS Qatar, KPMG Research & Analysis



Diverse opportunities for development across the project plots

| | Concept | Overview | Constraints |
|------|--------------------------------------|--|--|
| 01 | F&B / Beach Strip | Operating as Doha Sands with utilities, F&B services, and regular events; attracts strong visitation (~11.4K monthly in high season, ~5.8K in low season) | Limited parking and drop-off capacity; watersports not permitted |
| 02 | Luxury Beach | Operating as Doha Beach Club, operated by Discover Qatar; offers F&B services, themed events, and a dedicated ladies' area; attracts strong visitation (~12.4 monthly in high season, ~8.5K in low season) | Limited parking and drop-off capacity |
| 03 | Low-budget Beach | Operated by Loft A; includes F&B through two food courts, air-conditioned areas, indoor gym facilities, and a wide range of watersports (no alcohol permitted) | Limited parking and drop-off capacity; evening noise restrictions |
| 04/5 | Waterfront District | Currently vacant with no permanent structures | Since the lands are currently vacant, no significant constraints are evident |
| 06 | Island Leisure & Tourism Development | Currently vacant with no permanent structures | Requires utilities infrastructure, reliable transport connections to the island, and water connection stations to the mainland |



Source: Qatar Tourism, Ashghal, KPMG Research & Analysis



Roles & Responsibilities for the project

| Stage | Private Sector (Project Company) | Public Sector (Government) |
|-----------------|---|--|
| Design | <ul style="list-style-type: none"> Design, construction & securing all relevant approvals Access to utilities and Wi-Fi connectivity Demolition of existing structures, if needed Landscaping | <ul style="list-style-type: none"> Provision of land ready for construction Performance and progress monitoring |
| Build | <ul style="list-style-type: none"> Furniture, fixtures & equipment (FF&E) Ensuring connectivity between the Waterfront District & Al Safliya Island | |
| Finance | <ul style="list-style-type: none"> Capital structure (debt/equity split) Lease payments to the Authority Any other benefits to be shared with the Authority | <ul style="list-style-type: none"> Manage Contract Depending on option selected payment made on availability and performance |
| Operate | <ul style="list-style-type: none"> Cleaning Helpdesk & security Facilities management (both soft and hard) Lifecycle replacement | <ul style="list-style-type: none"> Performance Monitoring |
| Maintain | <ul style="list-style-type: none"> Retail & food and beverage services Lease management for potential third-party involvement | <ul style="list-style-type: none"> Lease Agreement |

Option Development

The Authority is proposing Two Options for bid submission:

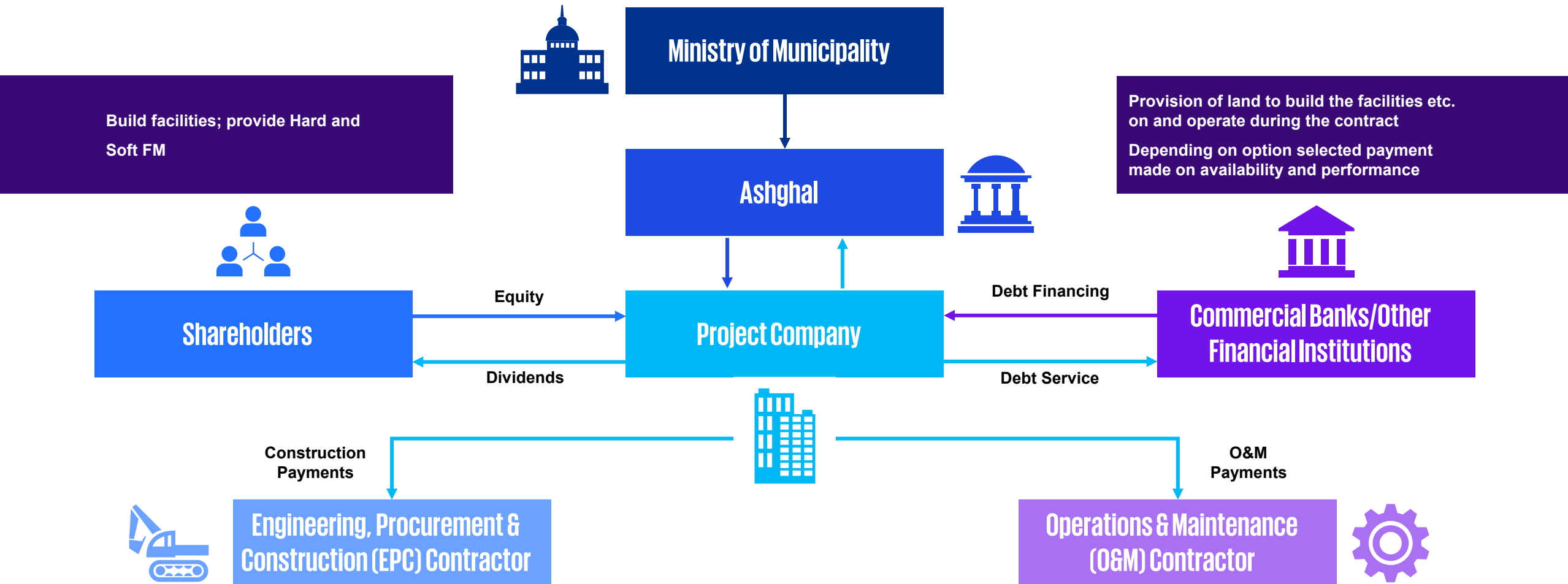
- **Option One:** Bidders may submit a proposal for the project as a single, integrated development. This submission must include:
 - A comprehensive design for all five West Bay beaches.
 - A high-level concept design for Al Safliya Island, including details on facility development and transportation arrangements to the island.
- **Option Two:** Bidders may submit a proposal for one or more preferred beach plots of their choice. In addition to the design for the selected plots, the submission must include:
 - A high-level concept design for Al Safliya Island, including details on facility development and transportation arrangements to the island.

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis



© 2025 KPMG LLC, a limited liability company registered with Qatar Financial Centre Authority (QFCA), State of Qatar and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

The project is set to adopt the following commercial structure



Source: Ashghal, KPMG Research & Analysis

Tapping into significant investment & market potential



01

An Opportunity to Capture the Growth in the Hospitality Market

The West Bay Beaches & Al Safliya Development represents a flagship opportunity for private investors, designed to capture growing demand in Qatar's fast-growing hospitality and leisure market

02



Strong Market Demand & Strategic Positioning

The project addresses rising demand for premium leisure, eco-tourism, and family destinations, while the location of Al Safliya Island just offshore from Doha ensures accessibility for both residents and international visitors.

03



Diversified Revenue Streams

The development can generate value across multiple segments, including resorts, luxury beach clubs, family beaches, dining and retail, nightlife, and water-based activities, reducing reliance on any single source of demand.

04



Tourism Growth Outlook

Sustained growth in international arrivals, combined with strong regional travel flows and increasing appetite for staycations, provides a solid foundation for long-term demand. Continued momentum from global events and Qatar's reputation as a tourism hub further strengthens the outlook.



PPP Structure

The Public-Private Partnership model provides investors with a secure, transparent framework for participation, balancing risk-sharing with the opportunity to benefit from long-term operations and eventual asset transfer in line with Vision 2030.

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis

Unique proposition – Al Safliya as a complement to current options



Banana Island vs. Al Safliya Island – Complementary Tourism Destinations

Banana Island and the planned Al Safliya development are both offshore leisure destinations but differ in scope and market positioning. Al Safliya is designed to fill a key gap by offering tailored staycations that combine wellness, recreation, dining, and cultural activities, broadening Qatar’s tourism appeal.

Development

Development Model

Market Positioning

Accessibility

Scale & Scope

Experience Offering



Al Safliya Island



Banana Island

Mixed-use PPP project with multiple investors and operators

Single-operator luxury resort run by Anantara

Multi-segment destination catering to families, mid-market, luxury, and day visitors

Exclusive luxury retreat with focus on wellness and leisure

Marine access only, 10-20 minutes by ferry or water taxi from Corniche/West Bay

Limited to resort guests and day-pass holders, reached by resort ferry

A broad ecosystem of facilities spanning ~1.6 mn sqm, featuring family beaches, luxury beach clubs, resorts, dining and nightlife destinations, eco-tourism experiences, and water sports activities

Banana Island spans ~200K sqm, offering integrated facilities including a beach, spa, and diverse dining options

Diversified experiences blending leisure, entertainment, eco-tourism, and cultural integration

Focused on relaxation, spa, and resort-style leisure

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis



Unique proposition – How Al Safliya differs from current market options



Qetaifan Island & Hilton Salwa Beach Resort and Villas – Different Concepts

Qetaifan Island North and Hilton Salwa Beach Resort differ in their concept and positioning. Qetaifan is an urban lifestyle island integrated into Lusail City, combining entertainment, hospitality, and residential uses, while Hilton Salwa is a large-scale destination resort located outside Doha, designed as a self-contained leisure hub.



Qetaifan Island



Hilton Salwa Beach Resort and Villas

Development

Development Model

Market Positioning

Accessibility

Scale & Scope

Experience Offering

Master-planned urban island development within Lusail City

Destination mega-resort operated by Hilton with a total of 361 rooms, suites, and exclusive villas

Mixed-use leisure hub with luxury hotels, waterpark, residences, and retail

Self-contained beachfront resort with villas, hotel rooms, F&B, and a large waterpark

Directly connected to Lusail and greater Doha; integrated with city infrastructure

Remote location near the border of Saudi Arabia, approximately 90 minutes from Doha; positioned as a getaway destination

Entertainment-driven, anchored by a large waterpark and residential offerings

Massive resort-scale hospitality project, blending accommodation with extensive leisure amenities

Urban lifestyle destination combining hospitality, leisure, and residential

All-inclusive resort stay focused on families, staycations, and leisure travelers

Source: Qatar Tourism, Ashghal, KPMG Research & Analysis



Positioning Al Safliya among global island destinations

Al Safliya positions itself as a balanced, diversified destination combining sustainability, leisure, and entertainment with inclusivity and accessibility designed to appeal to both domestic and international visitors.



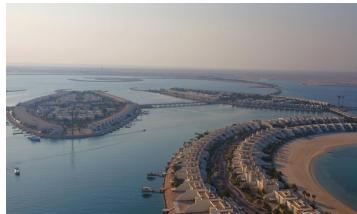
Bluewaters Island (Dubai, UAE)

A master-planned offshore island anchored by Ain Dubai, the world's largest observation wheel. It integrates luxury hotels, beach clubs, dining, retail, and entertainment, positioned to capture both mass leisure and high-end international tourists.



Red Sea – Sindalah & Amaala (Saudi Arabia)

The Red Sea developments form part of Saudi Arabia's mega-projects under Vision 2030. These offshore clusters focus on ultra-luxury and eco-tourism, offering resorts, wellness retreats, diving, and yachting, designed to attract global high-net-worth travelers.



Amwaj & Durrat Al Bahrain (Bahrain)

These man-made islands combine residential, marina, and hospitality functions. They offer hotels, waterfront leisure, and community attractions, serving both regional visitors and residents, with a stronger residential mix than pure tourism hubs.



Sentosa Island (Singapore)

Sentosa is a long-established island destination developed through PPPs. It integrates beaches, family attractions, theme parks, hotels, casinos, and conference facilities, accessible via multiple transport links, and positioned as a all-in-one leisure hub.



Palawan Island – El Nido & Coron (Philippines)

Palawan's islands have been developed for eco-tourism, with resorts, eco-lodges, and diving hubs. The focus is on sustainability and nature-based experiences, appealing to eco-conscious travelers and mid-market adventure tourists.



Resorts World Bimini (Bahamas)

Located close to Florida, this PPP-driven development includes resorts, marinas, and other entertainment facilities. It caters largely to cruise passengers and North American tourists seeking short, convenient offshore leisure breaks.

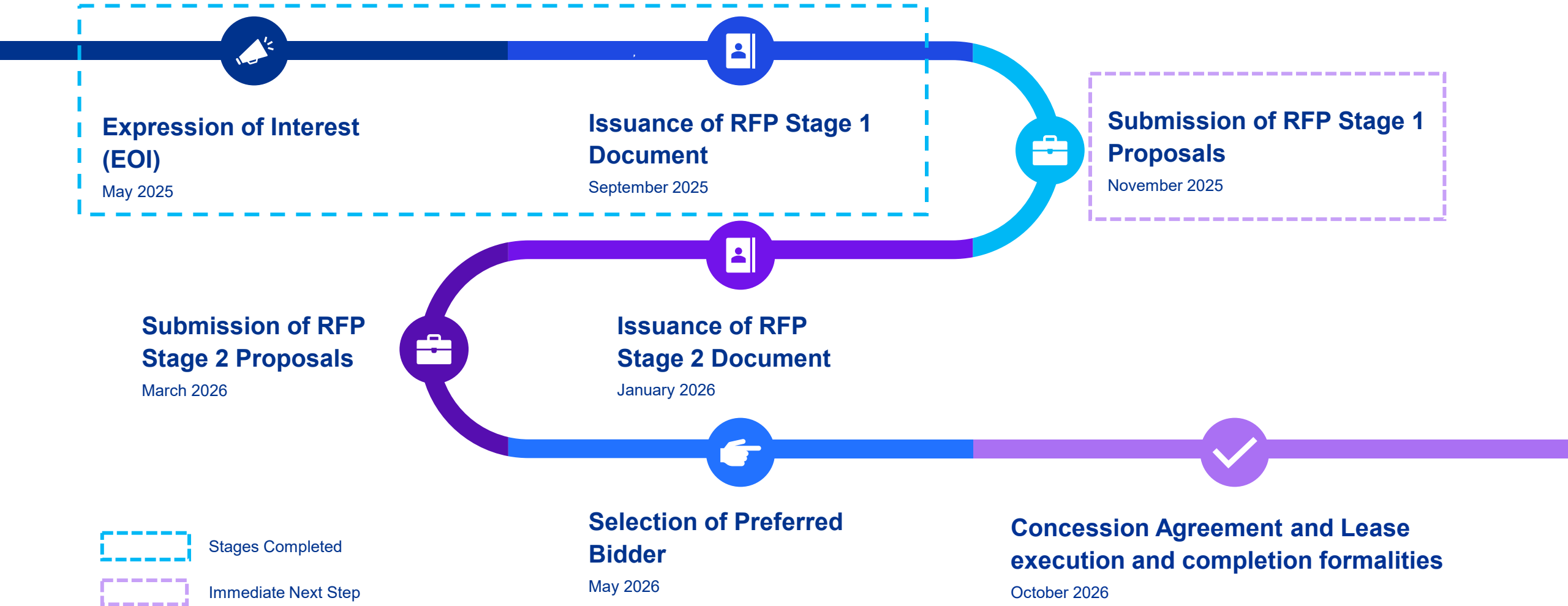
Source: KPMG Research & Analysis

04

Way Forward





Stages & timelines

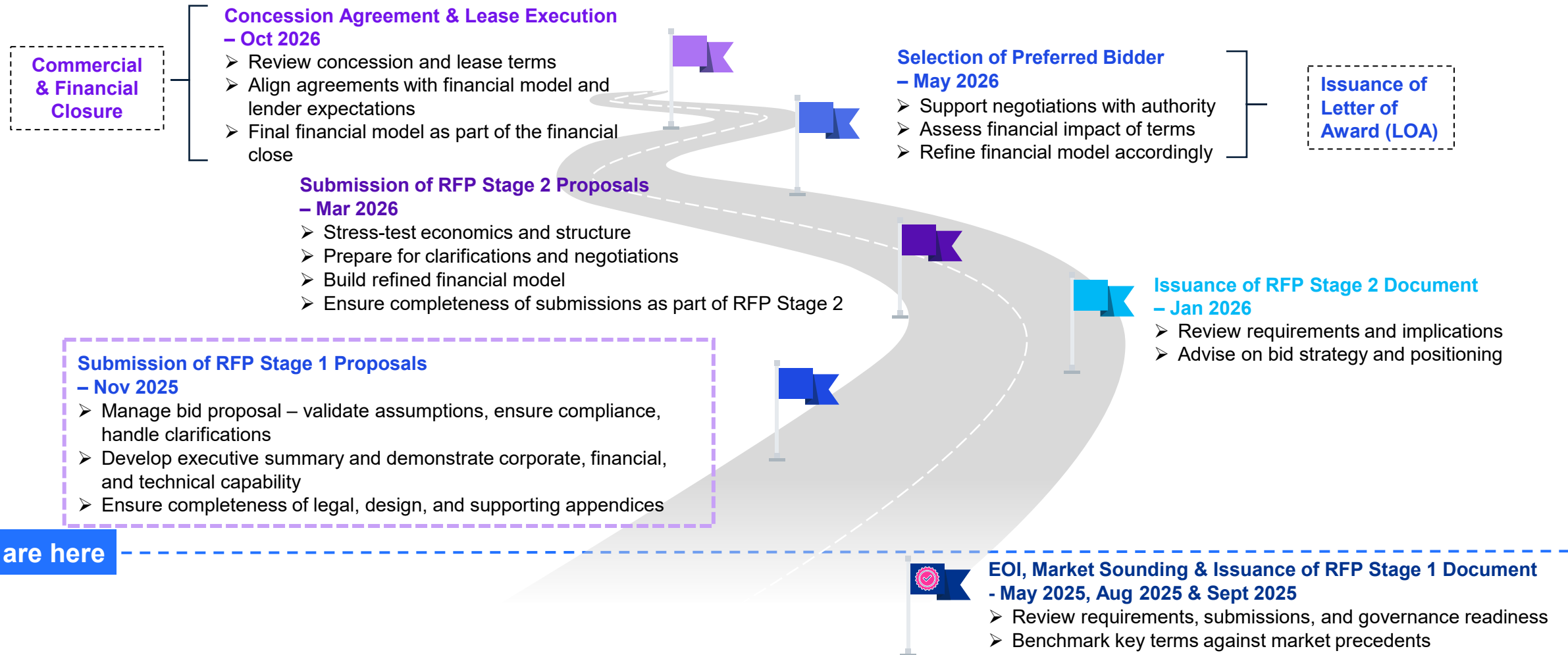


Source: Ashghal, KPMG Research & Analysis



Call to action – How KPMG can support

-  Immediate Next step
-  Step completed



Contact Us

**Venkat Krishnaswamy**

Partner,
Head of Advisory
KPMG in Qatar

kvenkatesh@kpmg.com
M : +974 5554 1024

**Sayantan Pande**

Director,
Head - Infrastructure & Real
Estate Advisory
KPMG in Qatar
sayantanpande@kpmg.com
M : +974 3330 9793

**Rishu Gupta**

Manager, Infrastructure & Real
Estate Advisory
KPMG in Qatar

guptar@kpmg.com
M: +974 6653 7641

**Mohit Gauriar**

Manager, Infrastructure & Real
Estate Advisory
KPMG in Qatar

mgauriar@kpmg.com
M: +974 7087 0342

**Firas Moukhadder**

Senior Consultant, Infrastructure
& Real Estate Advisory
KPMG in Qatar

fmoukhadder@kpmg.com
M: +974 7783 8458

kpmg.com/qa



© 2025 KPMG Qatar Branch is registered with the Ministry of Commerce and Industry, State of Qatar and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

© 2025 KPMG LLC, a limited liability company registered with Qatar Financial Centre Authority (QFCA), State of Qatar and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

The KPMG name and logo are registered trademarks of KPMG International.