

Travel in the United Arab Emirates

September 2023

Table of Contents

EXECUTIVE SUMMARY

Travel in 2023

Airlines: Key trends

Hotels: Key trends

Booking: Key trends

What next for travel?

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2018-2023

Table 2 - Surface Travel Modes Online Sales: Value 2018-2023

Table 3 - Forecast Surface Travel Modes Sales: Value 2023-2028

Table 4 - Forecast Surface Travel Modes Online Sales: Value 2023-2028

Table 5 - In-Destination Spending: Value 2018-2023

Table 6 - Forecast In-Destination Spending: Value 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Tourism Flows in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism flows in the United Arab Emirates soar, with surging demand and strategic growth initiatives

Surge in outbound travel as the expatriate community takes flight, and more visas drive inbound travel

India leads arrivals, while GCC and Western Europe also contribute to Dubai's vibrant travel industry

PROSPECTS AND OPPORTUNITIES

Surging MICE travel poised to give a boost to inbound flows

Positioning for resurgence: Dynamic travel industry adapts to the release of pent-up demand and strategic growth

Sustainable initiatives set to elevate tourism in the United Arab Emirates over the forecast period

CATEGORY DATA

Table 7 - Inbound Arrivals: Number of Trips 2018-2023

Table 8 - Inbound Arrivals by Country: Number of Trips 2018-2023

Table 9 - Inbound City Arrivals 2018-2023

Table 10 - Inbound Tourism Spending: Value 2018-2023

Table 11 - Forecast Inbound Arrivals: Number of Trips 2023-2028

Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2023-2028

Table 13 - Forecast Inbound Tourism Spending: Value 2023-2028

Table 14 - Domestic Trips by Destination: Number of Trips 2018-2023

Table 15 - Domestic Spending: Value 2018-2023

Table 16 - Forecast Domestic Trips by Destination: Number of Trips 2023-2028

Table 17 - Forecast Domestic Spending: Value 2023-2028

Table 18 - Outbound Departures: Number of Trips 2018-2023

Table 19 - Outbound Departures by Destination: Number of Trips 2018-2023

Table 20 - Outbound Tourism Spending: Value 2018-2023

Table 21 - Forecast Outbound Departures: Number of Trips 2023-2028

Table 22 - Forecast Outbound Departures by Destination: Number of Trips 2023-2028

Table 23 - Forecast Outbound Spending: Value 2023-2028

Airlines in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Profits soar for Emirates Airlines, further cementing its foothold in the market

Low cost carriers sees increased demand amidst inflationary pressures

PROSPECTS AND OPPORTUNITIES

Airlines poised for exponential growth and innovation in the United Arab Emirates in the post-pandemic era

Emirates Airlines leads the path to sustainability with paperless boarding passes in its Dubai hub

CATEGORY DATA

Table 24 - Airlines Sales: Value 2018-2023

Table 25 - Airlines Online Sales: Value 2018-2023

Table 26 - Airlines: Passengers Carried 2018-2023

Table 27 - Airlines NBO Company Shares: % Value 2018-2022

Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2023

Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2023

Table 30 - Full Service Carriers Brands by Key Performance Indicators 2023

Table 31 - Forecast Airlines Sales: Value 2023-2028

Table 32 - Forecast Airlines Online Sales: Value 2023-2028

Lodging (Destination) in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dubai remains the best performing in hotels amongst the seven emirates and globally

Budget and mid-market hotels gain popularity amongst holidaymakers in the United Arab Emirates

PROSPECTS AND OPPORTUNITIES

Hospitality in the United Arab Emirates set to thrive due to tourism rebound and strategic initiatives

International leisure and domestic tourists expected to drive demand for and growth of hotels

CATEGORY DATA

Table 33 - Lodging (Destination) Sales: Value 2018-2023

Table 34 - Lodging (Destination) Online Sales: Value 2018-2023

Table 35 - Hotels Sales: Value 2018-2023

Table 36 - Hotels Online Sales: Value 2018-2023

Table 37 - Other Lodging Sales: Value 2018-2023

Table 38 - Other Lodging Online Sales: Value 2018-2023

Table 39 - Lodging (Destination) Outlets: Units 2018-2023

Table 40 - Lodging (Destination) Rooms: Number of Rooms 2018-2023

Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2018-2023

Table 42 - Hotels NBO Company Shares: % Value 2018-2022

Table 43 - Hotel Brands by Key Performance Indicators 2023

Table 44 - Forecast Lodging (Destination) Sales: Value 2023-2028

Table 45 - Forecast Lodging (Destination) Online Sales: Value 2023-2028

Table 46 - Forecast Hotels Sales: Value 2023-2028

Table 47 - Forecast Hotels Online Sales: Value 2023-2028

Table 48 - Forecast Other Lodging Sales: Value 2023-2028

Table 49 - Forecast Other Lodging Online Sales: Value 2023-2028

Table 50 - Forecast Lodging (Destination) Outlets: Units 2023-2028

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hotels encourage direct booking, challenging intermediaries

Continued rise of an omnichannel approach

PROSPECTS AND OPPORTUNITIES

Hotel booking landscape set to evolve, with the rise of direct bookings and shifting dynamics

Intermediaries will continue to dominate booking, despite growing interest in direct reservations in the United Arab Emirates

CATEGORY DATA

Table 51 - Booking Sales: Value 2018-2023

Table 52 - Business Travel Sales: Value 2018-2023

Table 53 - Leisure Travel Sales: Value 2018-2023

Table 54 - Travel Intermediaries NBO Company Shares: % Value 2018-2023

Table 55 - Forecast Booking Sales: Value 2023-2028

Table 56 - Forecast Business Travel Sales: Value 2023-2028

Table 57 - Forecast Leisure Travel Sales: Value 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/travel-in-the-united-arab-emirates/report.