

# ATM Travel Trends Report 2025

In association with  
**Tourism Economics**



**arabian**  
travel market®  
**DUBAI**

Mon 28 April - Thu 1 May 2025





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# Foreword



## Introducing ATM Travel Trends Report 2025

As the leading international travel and tourism event in the Middle East, Arabian Travel Market (ATM) serves as a vital bridge between the East and West, convening the global industry in Dubai, where it offers a platform for fostering meaningful connections, unlocking new opportunities, and growth across every vertical of the Travel and Tourism sector. In our unique position as the only event to connect all facets of the global travel ecosystem, we remain committed to delivering cutting-edge insights that empower the industry.

The Arabian Travel Market Travel Trends Report 2025 explores the key trends shaping regional and global tourism today. From the surging momentum in business travel and the rise of sustainable tourism to the transformative potential of AI, this report provides decision-makers with intelligence to navigate the full spectrum of travel and tourism and capitalise on emerging opportunities.

**Danielle Curtis**  
**Exhibition Director ME**  
**Arabian Travel Market (ATM)**



## Introducing Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing destinations and corporations worldwide. More than 500 companies, associations, and destinations work with Tourism Economics every year as research partners. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. As part of the leading global economic forecaster and provider of quantitative analysis, our work is backed by world-class datasets for navigating economic uncertainty.

We are proud to partner with Arabian Travel Market and share our perspectives regarding the scope of opportunity for travel growth in the Middle East region. The story is overwhelmingly positive as the region's innovation and commitment to high quality tourism experiences and ever-improving connectivity is enabling an impressive foundation for growth. This report provides a comprehensive overview of travel activity and industry trends in the region and beyond empowering decision-makers with data-driven insights at a particularly exciting time in the region's development.

**Dave Goodger**  
**Managing Director EMEA**  
**Tourism Economics**





# Executive Summary

## Middle East achieving significant travel growth

Outstripping the global average, travel spend in the Middle East is expected to grow at over 7% per annum between 2025 and 2030, with cumulative growth of over 40%. As a result, by 2030 the Travel and Tourism sector is projected to generate expenditure of nearly \$350 billion in the Middle East, more than doubling its value compared with 2019 which is considered the previous high water mark for the sector. Travel recovery in recent years has already outperformed the global average for both domestic and international tourism activity.

## Inbound travel set to continue soaring

International travel to and within the region is a key driver of growth now and into the future with travel from outside the region set to grow at nearly double the pace of travel within the region. This is evident in the Middle East's rising share of global international travel which is set to rise to 14% by 2030 compared with 11% in 2024. Significant tourism developments and new attraction openings will support this acceleration as will continued progress enabling more seamless travel through less restrictive visa policies. A new unified visa for travel within the six Gulf Co-operation Council (GCC) countries is an especially important

potential development. Inbound travel, and especially travel from source markets outside of the region, will also be supported by improved air connectivity and with rapid growth in regional airline capacity. The four largest airlines in the region – Emirates, Etihad Airways, Qatar Airways, and Saudia – have placed nearly 780 aircraft orders with Boeing and Airbus, which represent major expansions to their existing fleets. This significant investment underscores the region's strategic focus on becoming a global aviation hub and meeting rising passenger demand over the coming decade.

**In 2030,  
total tourism  
spend in  
the Middle  
East will be  
50% higher  
than the  
2024 level at  
around  
\$350 bn.**

Source: Tourism Economics, 2025

**Inbound travel to the  
Middle East is growing  
rapidly with tourism nights  
from source markets  
outside the region  
set to grow by  
**13%**  
per year  
from 2025 to 2030.**

Source: Tourism Economics, 2025



## Business travel outperforming other regions

The region's strategic location straddling Asia, Africa, and Europe adds to its diversification and strength as a tourism destination. This is helping to support both leisure and business travel with the latter on a particularly steep trajectory of growth. Meetings, incentive, conferences and exhibitions (MICE) travel is playing an important role within this as the region's reputation for hosting major events grows and its attractiveness as a destination expands. The region is set to see the second fastest rate of business travel growth among all global regions which underlines

growing opportunities with business and blended business and leisure travel, known as bleisure.

Reinforcing the region's strong global position as a host for business events, the latest Event Industry Council Global Events Barometer for Q4 2024 showed that the Middle East was outperforming the global average with business event activity – based on hotel group room nights and event planner requests for proposals – above 2019 levels.

**The Middle East region is outperforming the global average for business event activity.**

Source: Event Industry Council, 2025

Business travel spend is expected to grow around  
**1.5 times**  
faster in the Middle East than the global average between 2025 and 2030.

Source: Tourism Economics, 2025

## Varied source markets

Reflecting diverse drivers of demand and its geographic position, the Middle East region welcomes a multitude of inbound visitors from short-, medium-, and long-haul markets. Strong cultural ties among countries in the region and in neighbouring areas creates regular travel flows. As a result, intraregional short-haul travel is significant making up around 40% of all international travel expenditure to and within the Middle East.

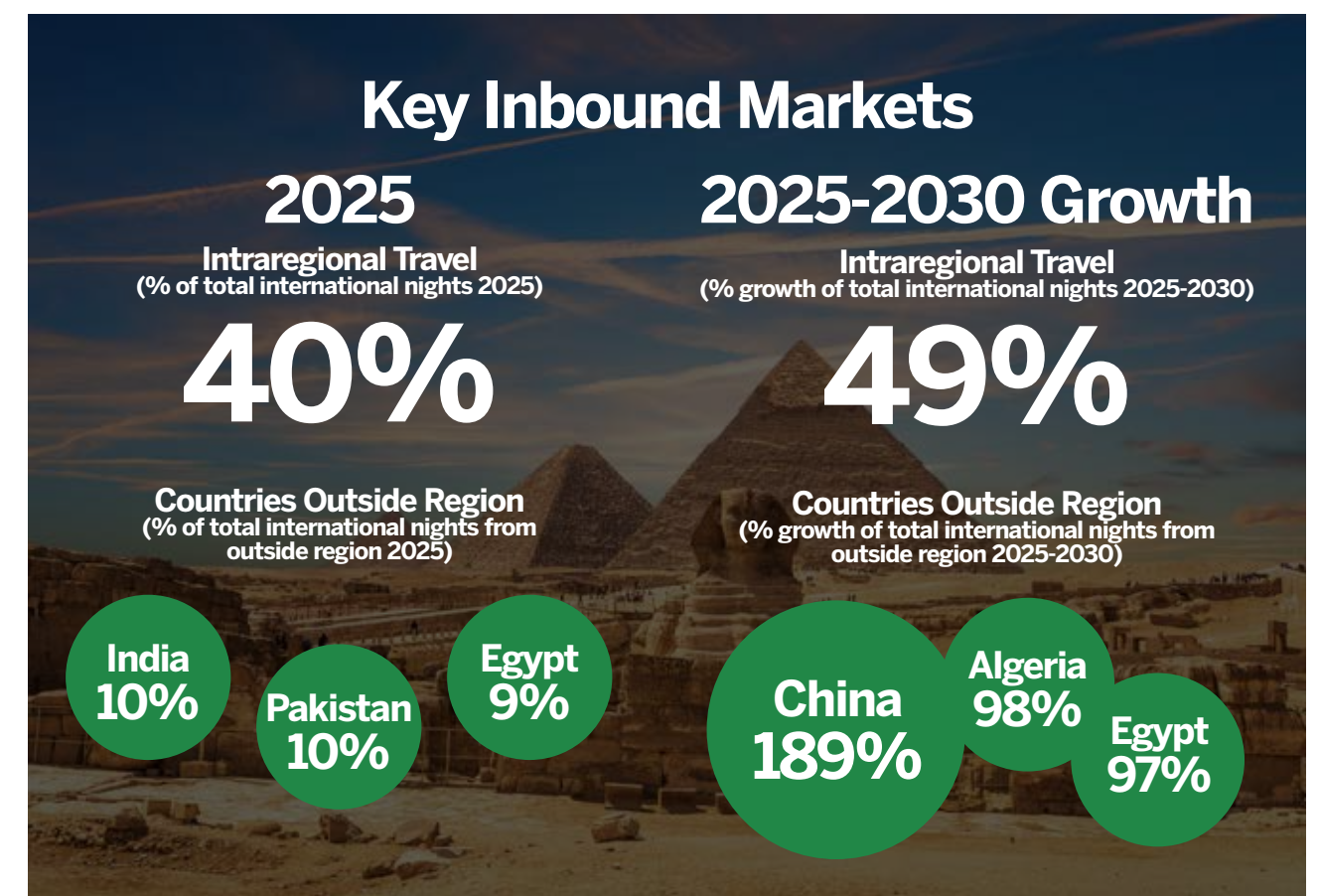
Signalling growing appeal to visit as the tourism offering continues to expand, medium- and long-haul markets are set to see brisk inbound growth. Tourism nights from Asia Pacific and Africa are on track to more than double between 2025 and 2030.

For leisure travel among source markets outside of the region, African markets are likely to grow the most by volume over the next five years, with Algeria and Egypt becoming significantly more important. European source markets overall are a foundation of inbound leisure travel making up nearly 50% of leisure travel from outside of the region in 2025, but also represent a higher proportion of spending. India and the UK will retain importance as the two largest leisure travel source markets. China remains a rapidly growing market and is an important source of revenue as the tenth largest market by volume but the third largest in terms of value.

For business travel, Europe and Asia Pacific are particularly important source markets with each making up nearly 40% of all inbound nights from

source markets outside of the region. With growing volumes of business travellers expected from India, Pakistan, and China, Asia Pacific as a source market for business travel in the Middle East is set to gain prominence.

Another emerging driver of demand is cruise tourism which in 2025 is expected to bring over 2 million passengers to the region. The location of the Middle East is advantageous helping to support growth as the region's proximity to Europe enables an important alternative for vessels relocating after the peak season in the Mediterranean. The Middle East's eclectic destinations are anticipated to draw more cruise visitors in the future which is emphasised by the forthcoming launch of two new cruises lines in Saudi Arabia - Aroya Cruises and Aman at Sea.





## Luring luxury travellers

Helping to spearhead travel growth, the region's unique blend of modern infrastructure and rich cultural and historical offerings is a lure for discerning high-spending travellers. This includes high-net-worth and ultra-high-net-worth individuals (HNWI and UHNWI) living in and outside of the region along with other affluent travellers who seek exclusive and opulent experiences for which the region is becoming increasingly renowned.

Luxury properties and experiences are available across the region, but with a high concentration in Dubai and Abu Dhabi. New planned hotel developments, alongside further new attractions and sites, mean these Emirati cities remain key destinations for luxury travellers, although a number of additional luxury properties are set to open across the region in the coming years, including those part of Saudi Arabia's Giga-Projects. This will ensure the region remains top of mind for the global leisure traveller.

## Event-driven success

An important feature of the region's tourism development is capitalising on growing demand for live performances be it sport or other forms of entertainment such as concerts and festivals. After successfully delivering mega-events such as Qatar 2022 World Cup and Dubai Expo 2020, there is strong momentum to capitalise further, and this is evident as Saudi Arabia prepares to host the 2034 World Cup. In doing so, destinations are able to capitalise on a key trend of gig tripping, music events shaping travel decisions, and growing interest in sports tourism.

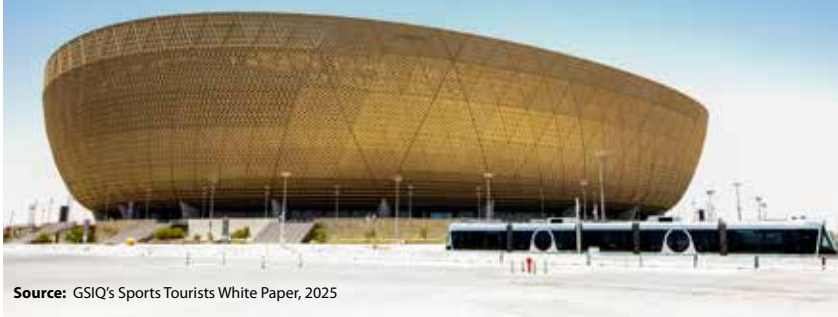
Golf, motorsports, football, cycling and esports are all benefitting from enhanced exposure in the region which is also contributing to drive travel activity. Event tourism helps destinations reach a wider market but also requires a broader accommodation offering which will support growth towards targets.

**There are over 170 luxury hotel properties across the Middle East with nearly 100 located in Dubai and Abu Dhabi.**

**An additional 22 hotels are in the pipeline in these two Emirati cities.**

Source: HVS, 2025

**There is strong appetite for sports tourism globally with a potential growth rate of 63% in the next few years.**



Source: GSIO's Sports Tourists White Paper, 2025

## Buoyant outbound travel

The strong economies of GCC countries, with GDP per capita nearly three times higher than the global average, is a major asset for the region which is facilitating burgeoning outbound travel activity to destinations in and outside of the Middle East. Middle East residents account for around 10% of global outbound travel while representing under 5% of the global population. As well as demonstrating above average propensity for international travel, residents of the region tend to spend more and stay longer than other outbound travellers.

Intraregional travel is a key component which makes up around 60% of all outbound activity undertaken by Middle Eastern residents.

**In 2024, Middle East outbound visitors recorded the second highest spend globally at \$255 per night and the highest average length of stay at nearly 8 nights.**

Source: Tourism Economics, 2025

## Middle East Key Outbound Markets

(% of outbound nights outside of region 2025)

**Saudi Arabia  
33%**

**United Arab Emirates  
10%**

**Kuwait  
8%**

## Key Destinations for Middle East Outbound

(% of outbound nights outside of region 2025)

**Egypt  
31%**

**United Kingdom  
11%**

**Turkey  
8%**

Source: Tourism Economics, 2025



Again, highlighting the region's diversity, outbound travel to medium- and long-haul destinations, including Europe and Asia Pacific, is also significant accounting for just over 40% of outbound trips typically driven by leisure demand.

Thailand and the UK are two key destinations for travel from the Middle East. Indeed, these destinations are set to benefit significantly in the coming five years as more residents from the region opt to go there.

Investment in new regional airlines and new fleet expansion will support continued outbound as well as inbound travel growth.

Outbound travel spending for all types of travel is poised to grow strongly over the next five years with annual growth rates of 4% or above. However, business travel is set to grow at almost twice the rate of leisure which presents particular opportunities for travel firms catering for the growing needs of business travellers transiting the region.

**Outbound business travel spend is set to grow by 9% per year from 2025 to 2030 (cumulative growth of over 50%), almost double the rate of outbound leisure and other purposes of travel.**

Source: Tourism Economics, 2025



## 2030 View

The next five years heralds continued rapid growth for travel in and outside of the region as countries across the territory develop and expand their tourism offerings underpinned by ambitious and bold national strategies to diversify their economies.

In 2030, the region is expected to achieve nearly 1.5 billion tourism nights from international travellers,

including 1 billion tourism nights from markets outside the region, and a further circa 1 billion tourism nights among domestic populations. Growth in travel activity will see the region increase its overall share of global tourism from 7% in 2024 to around 8% in 2030, with international travel leading the way.

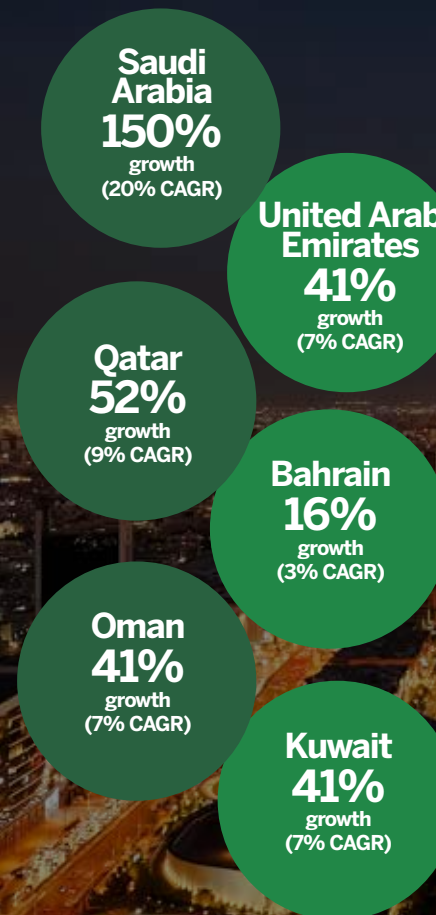
This is particularly impressive as the region benefitted significantly shortly after the pandemic with

many global destinations not fully opened. Testament to the success of international travel to the region, this share is expected to continue increasing, albeit marginally, which highlights underlying strong demand among international source markets. Reflecting the upward trajectory in visitor flows travel expenditure in the region will soar to new highs reaching \$350 billion by 2030.

## Middle East 2030 Travel Growth

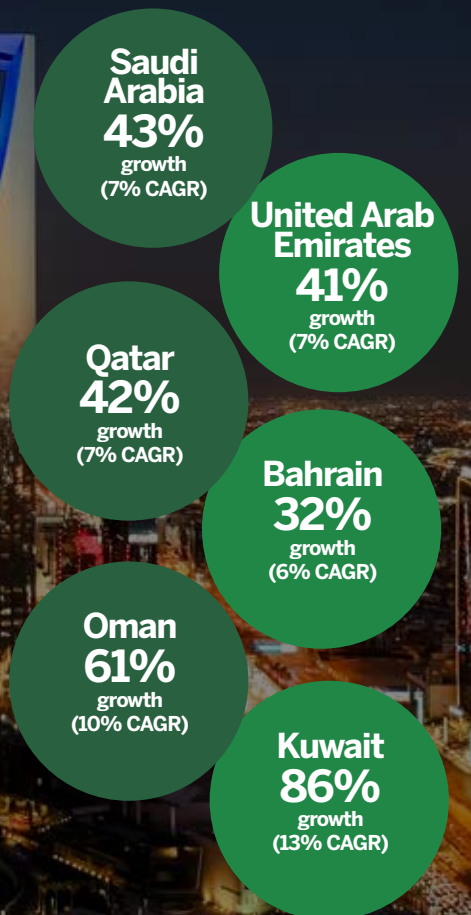
### Leisure nights growth (2025-2030)

Middle East Overall:  
**87% growth (13% CAGR)**



### Business nights growth (2025-2030)

Middle East Overall:  
**48% growth (8% CAGR)**



Source: Tourism Economics, 2025





# 01. Global Background

## The sky's the limit: Travel is hitting new heights

Global travel has rebounded strongly since the catastrophic impacts of the Covid-19 pandemic. In 2024, global inbound arrivals were on par with 2019, the high-water mark for tourism. Meanwhile, although heavily impacted in 2020 and 2021, overnight domestic tourism has grown strongly in recent years exceeding pre-pandemic levels. As a result, the overall picture for global tourism in 2024 is buoyant with total travel activity 8% above the 2019 level. The Middle East region has played a sizeable role in the growth story with inbound trips up by 20% compared with 2019 and domestic overnight trips nearly 50% higher in 2024.

The outlook for 2025 and beyond looks promising with international travel demand expected to ramp up notably in the coming years. Inbound travel activity globally is set to grow at 6% per year between 2025 and 2030. Demonstrating growing interest in the region, international travel growth in the Middle East, which includes intraregional travel between countries in the region as well as inbound travel from countries outside of the region, over the same five-year period is on track to outperform the global average at 10% per year.

Highlighting impressive growth potential, by 2030 over 290 million tourism trips are expected in the region, some 40% more than in 2024. Indeed, further illustrating the rapid growth trajectory, by 2030 the level of tourism activity is expected to be more than five times higher than in 2000, which represents growth of over 400%.

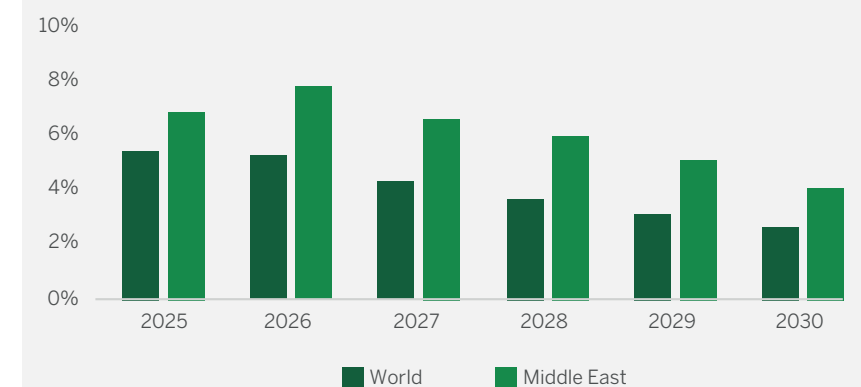
**In 2024, total tourism trips globally were 8% above 2019. Highlighting stronger growth, total trips increased by 34% over the same period in the Middle East.**

Source: Tourism Economics, 2025

**The economic impact of tourism in the Middle East accounts for 10% of the region's GDP and supports around 9% of its employment.**

Source: The World Travel & Tourism Council (WTTC), 2025

## Travel Growth Total arrivals annual growth



Source: Tourism Economics, 2025



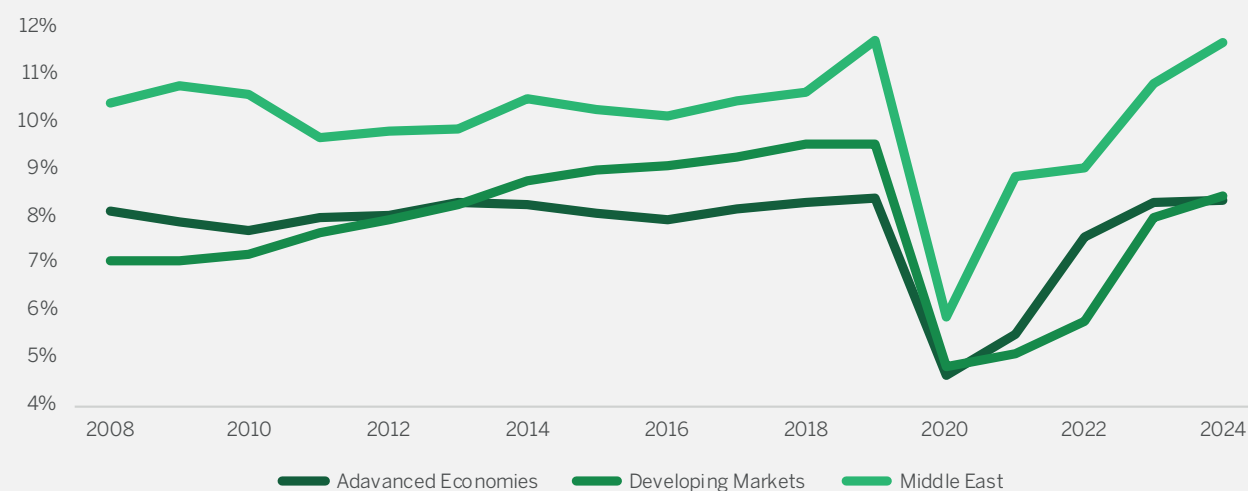
## Prioritised travel spend

A key feature of global tourism's impressive recovery has been its resilience against shifting economic factors. Since the end of the pandemic, consumers have prioritised their spending on travel despite increased living costs due to inflationary pressures. This highlights strong underlying travel demand which, in part, is being driven by invigorated interest as modern consumers seek to see, experience and interact with more of the world than ever before, part of a wider trend known as the experience economy.



## Travel Spend

Leisure travel spend share of total consumption



## Increased authenticity and personalisation driving new opportunities

Signalling a new phase in the evolution of the industry, today's travellers demonstrate shifting behaviours which present opportunities for growth. Increased appreciation for local and community-based offerings is generating new possibilities for travel firms and the broader travel ecosystem. Be it working more closely with local suppliers or providing a more authentic, locally curated experience, the industry is evolving to capitalise on growing preferences for more sustainable options.

Increased personalisation is another trend to which the industry is responding. Flexible cancellations and apps or artificial intelligence (AI) chatbots which enhance the customer experience are ways in which the industry is empowering customers giving them greater control over their trips. A growth in demand for unique and personalised experiences is being propelled as consumers increasingly shun generic one-size-fits-all offerings while being attracted by hyper-personalised recommendations and tailored experiences.



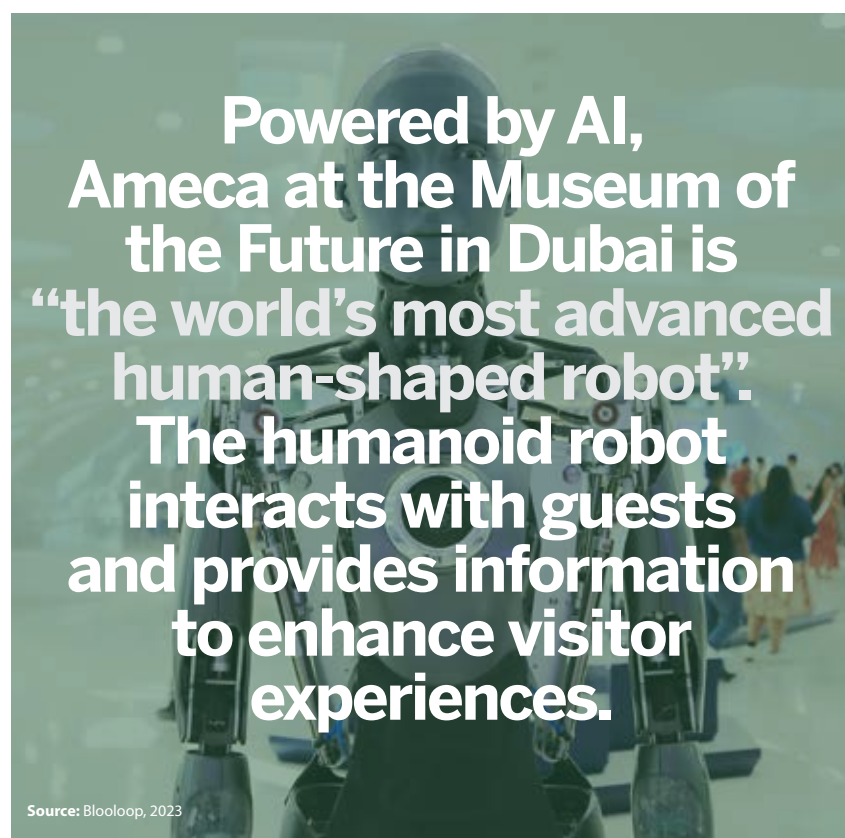


## Technology reshaping travel

As digital platforms become increasingly ingrained in consumer lifestyles, technology is set to have an expanded influence not just aiding travel planning and booking but also enabling more immersive and interactive experiences.

Technological innovations such as augmented reality (AR), virtual reality (VR) and mixed reality (MR) are contributing to enhance visitor experiences and helping travel firms improve sales conversions. For example, Radisson Hotel Group offers interactive and immersive tours, including using VR headsets, to help meeting planners visualise their meeting spaces. The technology is integrated with its Book It Easy tool which has helped increase enquiries and conversions.

Travel firms are also embracing new technologies such as AI chatbots to provide improved support for customers, leading to increased satisfaction and bigger economic impacts. Miral, a leading attractions operator in the United Arab Emirates, has pioneered the use of an AI concierge, known as Majd AI, to assist visitors to their flagship attractions such as Yas Bay Waterfront and Ferrari World Yas Island in Abu Dhabi. The AI concierge service generates tailored suggestions based on individual preferences helping visitors to optimise their experience.



## Longer, more immersive trips

Shifts in behaviour are having far-reaching impacts on the economic footprint of the industry as the average length of stay for global trips looks set to continue growing bringing with it a new trajectory of growth for global travel. This means by 2030 there are expected to be nearly 30 billion tourism nights globally, including around 2.4 billion, 8% of the total share, in the Middle East.

Reflecting this steady growth, by 2030 the industry is expected to generate nearly \$10 trillion of consumer spending globally. This represents a compound annual growth rate (CAGR) of nearly 7% between 2025 and 2030. A slightly steeper trajectory of spending growth is expected for the Middle East with tourism expenditure set to experience CAGR growth of just over 7% during the period.



## Tourism Nights Growth

Total tourism nights annual growth (trend and actual/forecast)  
Index 2019 = 100, dashed lines are 2010-19 trend



Source: Tourism Economics, 2025



Growing adoption of 'slow travel' as more consumers opt for longer, more immersive trips is contributing to this shift. Sustainability considerations are also shaping this trend as consumers increasingly evaluate the impact of travel on the environment which for some means taking fewer but longer trips abroad.

Strengthening interest in short-term rentals as platforms such as Airbnb and Vrbo expand their global footprint is further enabling consumers to experience destinations more fully. The Middle East is currently seeing rapid growth in this space with global short-term let platforms and a growing number of local platforms such as Frank Porter in the United Arab Emirates offering an expanding range of options for business and leisure travellers seeking a modern alternative to hotels.

**The global short-term rental industry increased guest capacity by 9% in 2024. There was especially high inventory growth in Riyadh 69% and Dubai 26%**

Source: Lighthouse, 2025



## Business travel rebound

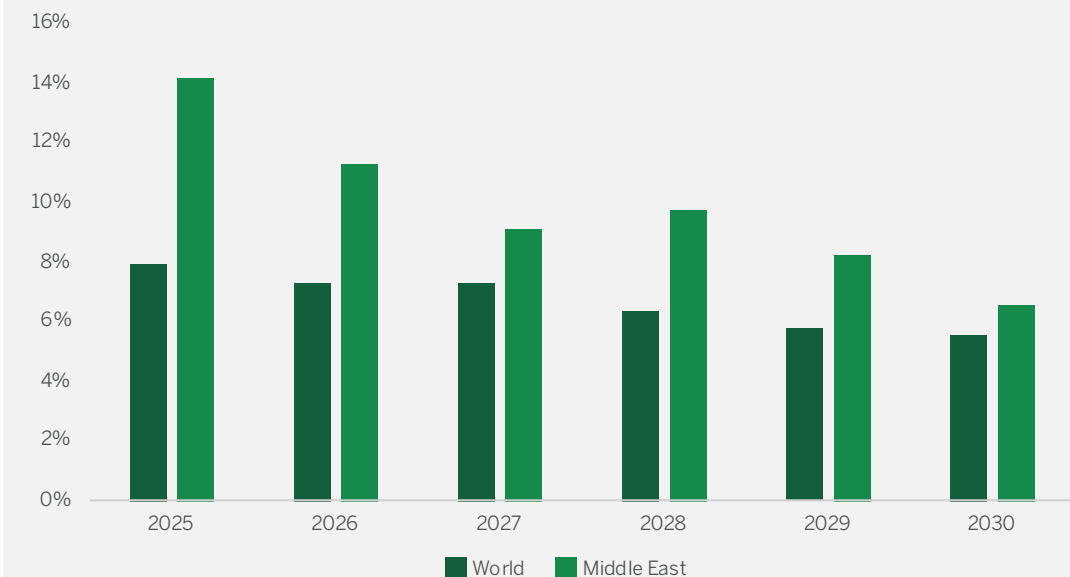
Leisure travel has rebounded faster than other segments since the end of the pandemic as pent-up demand was released. Defying some expectations it might be irreversibly impacted due to the prevalence of online meetings during Covid-19, business travel has also performed strongly in the wake of the pandemic.

In 2024, global business travel expenditure stood at nearly \$1.5 trillion, some 20% of total tourism expenditure. In nominal terms, this marked a 21% uplift compared with 2019. An impressive annual rate of growth of around 6% is expected between 2025 and 2030 with international business travel set to increase by 9% per year.

Reflecting the Middle East's burgeoning reputation as a strategic hub for business events with strong connections and state-of-the-art facilities, including Dubai World Trade Centre, the region's largest event and exhibition centre, business travel spend is expected to surge over the next five years growing at annual rate of around 9%.

## Business Travel Growth

Business travel spend annual growth



Source: Tourism Economics, 2025

**Business travel spend is on course to grow faster over the next five years in the Middle East compared to the global average.**

Source: Tourism Economics, 2025



## Live events and bleisure gaining appeal

The swelling popularity of leisure events also offers new potential. Consumers have sought to reconnect with culture in more meaningful ways after the pandemic and this has resulted in elevated demand for live experiences. The ground-breaking success of Taylor Swift's Era Tour, coining a term illustrative of its impact, 'Swiftonomics', is testament to the popularity of live performances which are destined to play an increasingly important role driving tourism demand, both globally and across the Middle East.

Straddling traditional leisure and business travel, so-called 'bleisure' travel has accelerated in recent years as increased remote working plus increasingly flexible working visas such as digital nomad visas like those offered by Spain and the United Arab Emirates have enabled increased living and working overseas. Adding to this opportunity, business travellers are frequently extending their stays in destinations post pandemic which underscores a wave of opportunity in this fast growing newer vertical.

**Leisure events were considered the top opportunity for tourism growth among industry experts, mentioned by 50%**

Source: Tourism Economics, 2025

**Over four in 10 business travellers have extended a work trip when their company policy allows it.**

Source: : TravelPerk, 2024







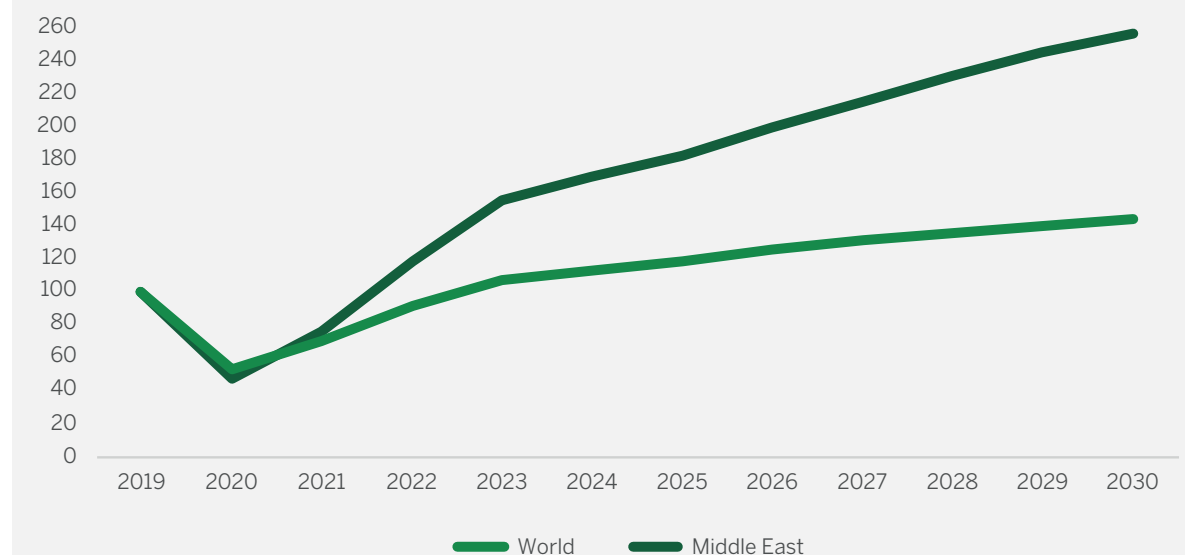
## 02. Middle East Trends

Regional factors as well as global trends are expected to heavily influence the pathway for tourism growth in the Middle East in the coming years. The region's strategic focus to expand tourism and diversify economies along with the ever-evolving needs and behaviours

of travellers, among other aspects, will reshape the travel landscape in the Middle East. The outlook is promising with the region poised to achieve notably faster growth compared with the global average in the years ahead.

### Tourism Nights Growth

Total tourism nights annual growth  
Index 2019 = 100



Source: Tourism Economics, 2025





## Economic and structural drivers

### GCC prosperity supports tourism growth in the Middle East

While there are economic and geopolitical challenges due to instability and conflicts in the Middle East as well as uncertainties as a result of shifting trade and foreign policies, the economies of GCC countries - Saudi Arabia, Kuwait, the United Arab Emirates, Qatar, Bahrain, and Oman – are thriving, having outperformed most nations in recent years. Helping to further cement the bloc's profile

as a major economic power in the coming years, GDP growth across the six countries is on track to grow healthily by over 5% per year over the next five years, outperforming advanced economies globally.

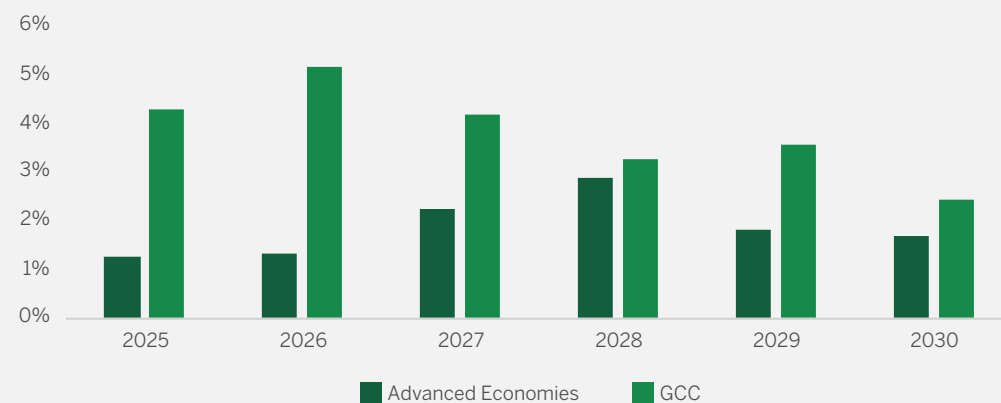
The sturdy economic foundations of this group of nations reflects their high standards of living and well-established educational systems. Based on the latest United Nation's Human Development Report published in March 2024, each of the six countries were rated in the top

third globally based on their Human Development Index scores, which evaluates a range of dimensions across global populations. With strong economic growth and rising disposable incomes expected in these countries, which make up a large portion of the overall geography of the region, there is a buoyant outlook for domestic and intraregional travel in the Middle East. This is further bolstered by close cultural connections between neighbouring countries in and surrounding the region.

**GDP per capita in GCC countries is around 10% higher than in the European Union at over \$70,000 in 2025.**

Source: IMF, 2025

### GDP Growth Rates Annual GDP growth



Source: Tourism Economics, 2025

**Domestic and intraregional travel is expected to account for 51% of nights spent in the Middle East in 2025.**

Source: Tourism Economics, 2025

## East meets west: The Middle East's strategic location

Nestled between emerging and fast-growing markets in Asia to the east and established, advanced economies in Europe and beyond to the west, facilitates unique opportunities for the region's tourism industry to benefit from a diverse mix of demand.

This is likely contributing to its impressive inbound growth as more travellers from key outbound markets in both Asia and Europe continue to be drawn to the

region. This includes visitors from India, China as well as the United Kingdom, Germany and France.

For leisure travel, source markets in Europe are important accounting for around half of inbound nights among international markets outside of the region. Growth among European source markets is expected in the coming years but faster growth from markets outside of Europe is anticipated. Inbound travel from African and Asia Pacific

source markets is on track to more than double over the next five years.

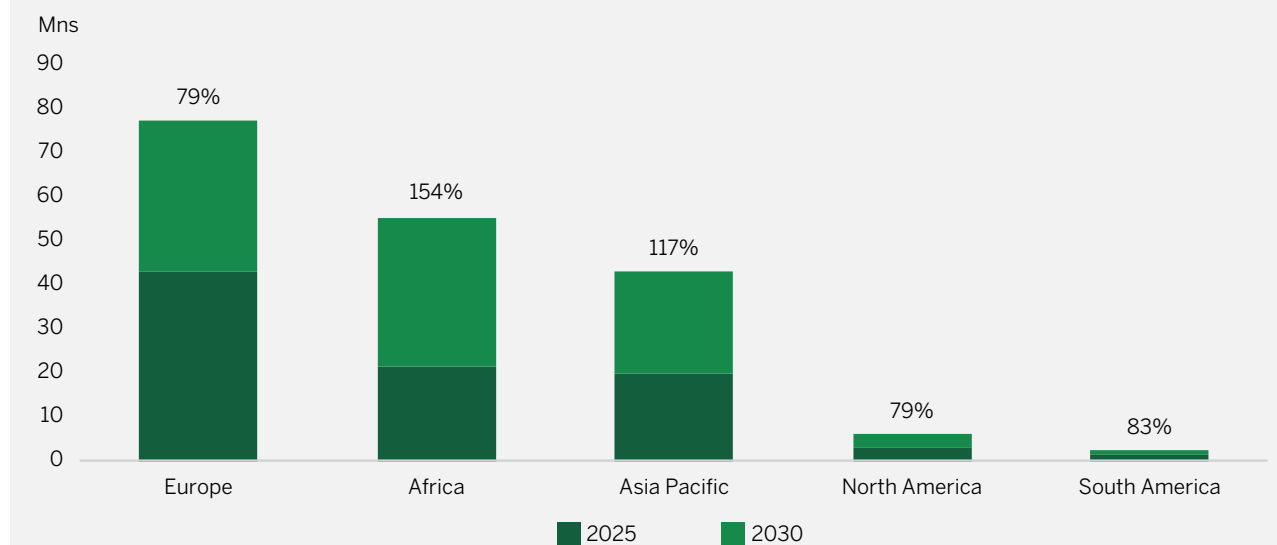
There is a similar story for business travel with European source markets currently accounting for the most inbound nights. Like for leisure travel, Asia Pacific and African source markets are set to grow faster over the next five years. Indeed, by 2030, Asia Pacific source markets will account for the largest share of business nights in the region with India, in particular, gaining importance.

**Around a third of the world's population live within a four-hour flight of the United Arab Emirates and two-thirds within an eight-hour flight.**

Source: Various

### International Leisure Tourism Nights

Volume of international leisure travel nights and total growth (2025-30) in the Middle East by source market world region (excluding Middle East)



Source: Tourism Economics, 2025

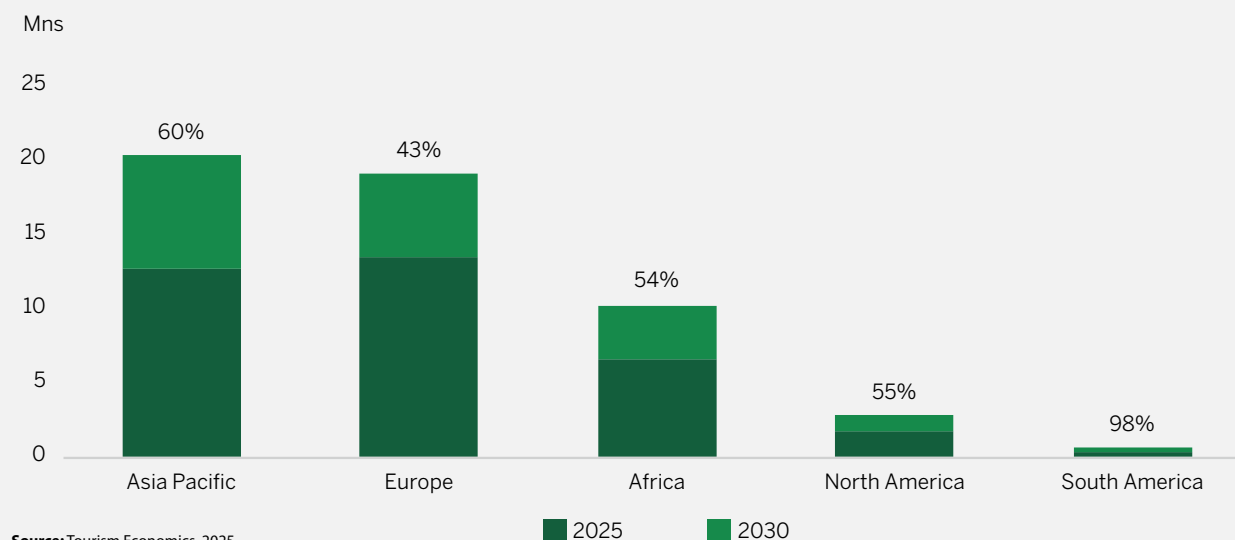


**European source markets are most important for international leisure travel into the region, although faster growth is expected for African and Asia Pacific markets in the next five years.**

Source: Tourism Economics, 2025

## International Business Tourism Nights

Volume of international business travel nights and total growth (2025-30) in the Middle East by source market world region (excluding Middle East)



Source: Tourism Economics, 2025

## New developments gaining market share

### Tourism diversification and innovation

The Middle East stands out globally as a region renowned for innovation and transformation. This is especially true considering the progress made expanding its tourism offerings in recent decades.

Bold national tourism strategies such as the United Arab Emirate's ambition to welcome 40 million hotel guests by 2031 signal not only a major commitment to grow tourism but also underscore its importance helping the region diversify away from a reliance on oil and gas industries. Similar strategies exist in other countries in the region, including the Kingdom of Saudi Arabia which through its imaginative Vision 2030 aims to attract 150 million visitors annually by 2030.

Meanwhile, Qatar's strategic roadmap for tourism development aims to attract 6 million visitors by 2030 as part of its Qatar National Vision 2030.

**The ambitious national strategies of GCC countries are aiming to more than double the number of overnight guests by 2030.**

Source: Roland Berger, 2024



## Infrastructure and attractions expansion

National commitments are helping to supercharge tourism growth facilitating the development of world-class and globally significant attractions, including Louvre Abu Dhabi, France's largest cultural project abroad which opened in 2017, and the Museum of Islamic Art in Qatar, the region's first carbon-neutral certified museum.

A wealth of major tourism-related infrastructure projects are in development across the region. This includes Saudi Arabia's Red Sea Project and NEOM project, an ambitious tourism development with several new destinations and resorts due to be launched by 2030.

Development activity is not isolated to the region's two largest countries. There are major development initiatives underway across the region. This includes Oman's infrastructure projects in the scenic mountainous region of Jabal Al Akhdar. Significant government investment is creating improved road connections and new recreational facilities, part of the Green Mountain Park project, to boost the region's attractiveness for visitors.

Another country in the region investing heavily to develop its offering is Bahrain. In 2024, Bahrain Ministry of Tourism announced plans for two major waterfront projects to transform its tourism landscape: Galali Coast Waterfront and Bahrain Bay Beach. Further cementing the country's ambitions to establish itself as a must-see coastal destination, the government recently launched a new sea taxi public transportation service enabling an alternative route for locals and visitors alike to get around the island.



Source: Various

Signalling strong ambitions for sustained growth and innovation in the region, Abu Dhabi recently announced plans to develop the world's second Sphere, a unique entertainment venue integrating advanced technology and immersive experiences. These projects exemplify bold and diverse strategies being deployed to grow tourism across the region.

Government actions are also enabling fast-paced development of new accommodation provision across the region. In the United Arab Emirates there is a commitment to create 235,000 rooms by 2031. Similar strategies to boost hotel room and alternative accommodation supply are in place in other countries in the region. Indeed, the GCC region is poised to almost double its current hotel stock with an extra 400,000 rooms expected to be added over the next six years, according to Knight Frank's GCC Hospitality Market Review 2024.

New properties expected to open in the region this year include Raffles Jeddah, the first Raffles hotel in Saudi Arabia, Ciel Dubai Marina, projected to be the world's tallest hotel offering over 1,000 elegant rooms and suites and the innovative Hawar Resort by Mantis in Bahrain, a new hospitality concept surrounded by rich marine life and nature, including the world's largest colony of Socotra cormorants.

## Major new attractions in development across the region

**Simaisa, Qatar:**  
beachfront development including large-scale theme park and luxury retail offering

**Qiddiya, Saudi Arabia:**  
new entertainment hub, including theme park and water park

**Harry Potter Theme Park, United Arab Emirates:**

Miral in partnership with Warner Bros. Discovery are set to open the region's first Harry Potter-themed land

**Disney, United Arab Emirates:**

new iconic theme park resort has recently been announced for a waterfront location on Abu Dhabi's Yas Island

Source: Various



## Improved air connectivity

Alongside ambitious tourism strategies aimed to transform and diversify national economies, governments across the region have embarked on initiatives which are paving the way for significant tourism growth. Strategic investments in air route development, in particular, are enabling destinations to increase their global reach and accommodate different types of travellers. Gulf carriers such as Emirates, Qatar Airways and Etihad Airways, are already recognised for setting impressive benchmarks for aviation standards, including modern fleets and innovative in-flight services. This reputation combined with the region's geographically strategic location for connectivity offers new possibilities for success.

Airlines across the region have bold visions for expansion with Etihad Airways expected to increase its fleet to over 110 aircraft serving more than 90 destinations in 2025. Meanwhile, Qatar Airways, awarded the world's best airline for the eighth consecutive time at the 2024 World Airline Awards, recently announced plans to expand its fleet of wide-body aircraft to strengthen its offering which currently serves over 170 destinations worldwide. Such investment plans signal strong confidence in future growth and underscore the rosy outlook for travel into and outside of the region.

From a global perspective, GCC carriers are expected to lead the upcoming expansion in the aviation sector. While Middle East airlines

collectively account for 12% of all new unfilled aircraft orders placed with Boeing and Airbus, carriers based in the GCC are responsible for 93% of these orders.

Underlining commitment to facilitate extensive tourism growth, Saudi Arabia is expected to build the world's largest airport, King Salman International Airport, with plans to attract over 100 million passengers per year by 2030. This would surpass Dubai International Airport which in 2024 was the world's busiest airport with over 90 million passengers.

**Middle East air passenger demand is expected to grow 23% between 2025 and 2030. This represents CAGR of around 4%.**

Source: IATA / Tourism Economics, 2025

**Highlighting strong opportunities for growth across budget and luxury travel sectors, Flynas, the Middle East's first low-cost airline, and Etihad Airways are gearing up for public listings in 2025.**

Source: Various

## Cruising: The journey and the destination

Despite being particularly impacted by the pandemic as operations largely ground to a halt, another travel sector which has performed strongly in recent years is cruising. In 2024, there were an estimated 35 million global cruisers according Cruise Lines International Association (CLIA). This represented a 10% increase compared with 2023 and was nearly 20% above 2019 level of activity.

Many factors are contributing to this trend, including improved perceptions of value for money and effective industry strategies targeting new segments, including younger audiences. The Middle East offers a broad range of cruise itineraries with global appeal calling at popular destinations such as Dubai, Abu Dhabi and Doha as well as natural and ancient sites such as Aqaba, Jordan and Salalah, Oman.

Moreover, the region provides an appealing alternative for winter and spring itineraries for vessels usually operating in the Mediterranean from April to October. This enables a viable substitute for the industry instead of relocating vessels to the Caribbean during off-season months.

The region has shown strong resilience following disturbances with cruise ships continuing to avoid transiting via the Suez Canal and shrinking deployment in the nearby Red Sea region. However, illustrative of optimism for growth, there is significant cruise product and strategic development in the region. This is exemplified by the launch of local cruise lines such as Aroya Cruises in the premium segment and Aman at Sea in the luxury segment. Moreover, MSC has recently launched dedicated ship in the region, MSC Euribia, which underscores industry commitment and ambition within the region.

There is evidence of steady demand for cruise itineraries in the Arabian

Peninsula. In 2025, passenger volumes are expected to surpass 2 million and, in 2026, an extra two destinations are expected to be launched bolstering demand. Meanwhile, the Red Sea region is set to welcome around 500,000 passengers in 2025, with over half of those calling at Jeddah, a vibrant cultural and historical destination and key gateway to the holy city of Mecca.

Further underlining the region's appeal as a cruise destination, analysis of Tourism Economics' Travel Trends Survey revealed a strong connection between those who were interested in visiting the region and cruising. These would-be visitors were almost twice as likely to undertake cruise holidays compared to those interested in visiting elsewhere. This result highlights an opportunity to attract more cruisers to the region by effective marketing to targeted segments, including younger, financially well-off audiences.

**Saudi Arabia is set to launch a new cruise line - Aman at Sea - to join the recently launched Aroya Cruises in order to target diverse customer segments.**

Source: Various

**Middle East destinations expected to record 300,000+ cruise visits in 2025:**

Dubai:  
c. 950k

Jeddah:  
c. 300k

Abu Dhabi:  
c. 400k

Doha:  
c. 300k

Source: Tourism Economics, 2025



## Unified visa-free travel

Advancements in less restrictive travel in the region have already contributed to support tourism growth in recent years as many countries including Saudi Arabia, Qatar and the United Arab Emirates have reduced barriers to entry and improved visa application systems. Examples include the new Hayya portal operated by the Qatari government enabling a more seamless experience for would be travellers within the GCC and efforts by the Saudi government to expand its e-visa programme,

which today enables improved access for visitors from over 60 countries.

Further visa improvements offer additional opportunities for growth among new and existing source markets. A new unified tourist visa allowing for free travel between the six GCC countries, replicating the Schengen Visa system used in Europe, is planned which is expected to herald a new wave of opportunity for inbound and intraregional travel in the region.

The adoption of less restrictive visa policies can lead to a significant increase in international visitors due to competitiveness gains and increased market share. The extent of this increase varies according to the type of visa policy change and the source market to which the change is applied. For example, destinations that transition underdeveloped source markets from embassy or consulate regimes to visa-free access could see a 40% uplift in international visitors over several years.

**E-visa platforms are increasingly being adopted by countries in the Middle East and globally to enable simplified visa applications. Kuwait has recently relaunched its platform making the process even more streamlined for tourists.**

Source: Various

**Less restrictive visa policies can generate growth of up to 40% in visitor numbers from individual source markets over several years, depending on the specific type of visa policy change.**

Source: Tourism Economics, 2025

## Business events driving growth

### Good for business

It's not just leisure events that are adding to tourism growth across the region. It's not just leisure events that are adding to tourism growth across the region. Business Events (M.I.C.E. Travel), including meetings, incentive travel, conferences and exhibitions, are also playing a crucial role attracting new typically higher-spending visitors to the region. These types of events can also leave unique legacies for host destinations, including increased profile, which can reap additional benefits. A good example of this is Saudi Film Confex, which debuted in 2023 and in 2024 achieved over 70,000 attendees. The film industry in Saudi Arabia has undergone extensive growth in recent years, following significant reform in 2018. As a result, the event has played an important part showcasing the country's growing potential as a global production hub as well as drawing thousands of high spending attendees.

### Business Events (M.I.C.E. Travel) are particularly important

The region's geographic location at the crossroads where East meets West, and its expanding connectivity, combined with growing importance in key industries make it a hotbed for major conferences. Hundreds of thousands of delegates are attracted each year. Notable examples include ADIPEC in Abu Dhabi, the world's largest energy exhibition, and the newly formed Web Summit Qatar which attracted over 25,000 technology experts from over 120 countries in its inaugural year. ATM Dubai typifies this trend as attendance has grown by more than 35% since 2019 and has just added IBTM @ ATM providing a new gateway for the business events sector.

**Global business travel hit new highs in 2024 generating \$1.4 trillion and is set to increase rapidly to \$2 trillion by 2030. The Middle East is set to achieve a growing share of this expenditure from around 2.5% in 2024 to over 3% in 2030.**

Source: Tourism Economics, 2025

**Over 200,000 delegates from circa 170 countries attended ADIPEC 2024 which helped to secure cross-sectoral deals and partnerships worth more than \$10 billion.**

Source: ADIPEC/dmg events, 2025



International association events also generate significant tourism value and bring additional benefits for host destinations. These multi-day events bring together industry experts from across the globe, including members of the scientific and medical community, and typically attract thousands of delegates who often extend their stay. Based on the latest annual report from the International Congress and Convention Association (ICCA), the global body for the international association meetings industry, eight countries in the Middle East region were ranked within the top 100 global destinations. The United Arab Emirates was the highest ranked country in the region rated 37th in the global league table attracting nearly 100 in-person meetings in 2023. Standout cities for hosting these types of events were Dubai, Abu Dhabi and Doha which hosted around two-thirds of the region's international association events.



## Arabian Travel Market 2024

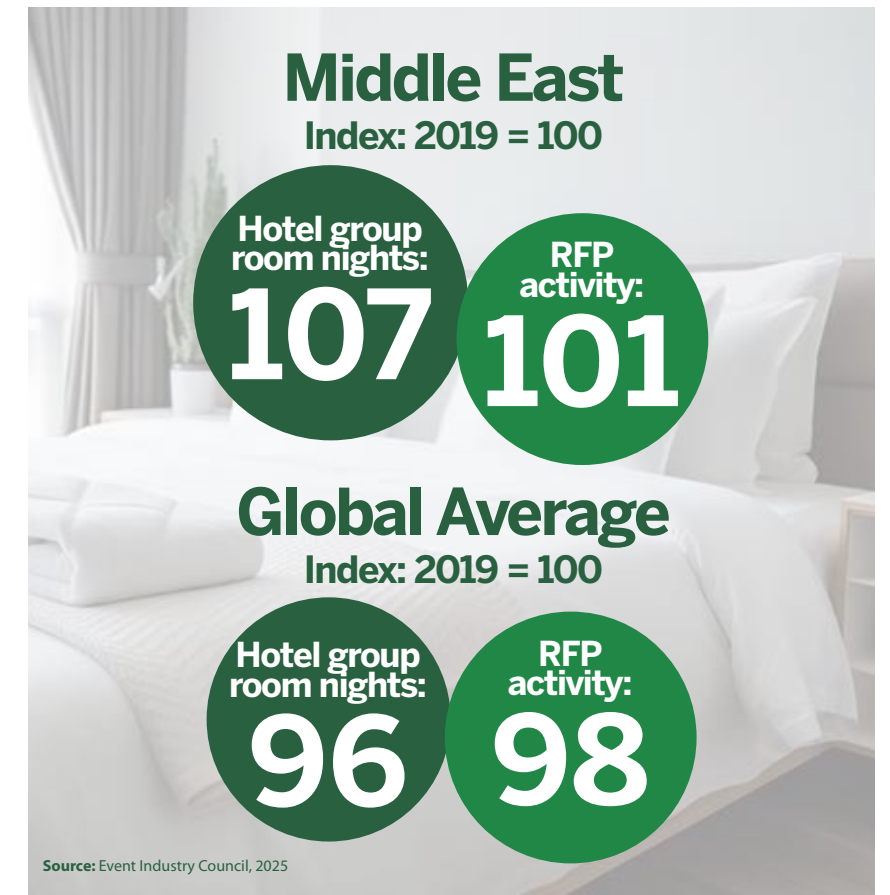
**In 2025, Arabian Travel Market (ATM), a leading global event enabling growth for the travel and tourism industry, welcomed over 55,000 tourism industry professionals from 166 countries at the Dubai World Trade Centre.**

**With more than 2,750 exhibitors, the event facilitated over \$2.5 billion in deals, and generated tourism expenditure estimated to be just short of \$50 million.**

Source: Reed Exhibitions/Tourism Economics, 2025

### Middle East performing strongly on business event metrics

Based on the latest Event Industry Council Global Events Barometer for the final quarter of 2024, the Middle East is well-positioned with hotel group room nights and event planner requests for proposal (RFP) – both good gauges of business event activity – above 2019 levels. These results set it apart from many other regions globally, including Western Europe which based on the latest reading remains over 10% below pre-pandemic levels of business event activity. Indeed, the report shows that business event activity globally remains slightly below 2019 which underlines the stellar performance of the Middle East in hosting business events in recent years.





## Luxury and leisure travel boom

### Luxury travel present luxurious opportunities

An important type of travel within the region which is anticipated to continue growing rapidly is luxury travel. According to McKinsey & Company, global spending on luxury leisure hospitality is expected to continue growing briskly reaching over \$390 billion by 2028. This growth presents opportunities which the Middle East region is well-positioned to benefit from.

This is evident in the consumer research undertaken by Tourism Economics as those who are interested in visiting the region demonstrate higher interest in premium and luxury experiences compared to others interested in visiting elsewhere. The region's association with luxurious experiences, including being home to some of the world's most exclusive hotels will help attract affluent, high spending travellers seeking such experiences. This includes properties such the Emirates Palace in Abu Dhabi and Jumeirah group's Burj Al Arab in Dubai as well as properties tied to luxury brands including Emaar's Armani Hotel and Marriott's Bulgari.

Although not confined to these segments, luxury travel is heavily influenced by the behaviour and preference of high-net-worth individuals (HNWI) and ultra-high-net-worth individuals (UHNW), which encompass individuals with assets over \$1 million. These types of travellers are more likely to book with boutique travel agents and they seek increased privacy, opulence and exclusivity compared with others.



The Middle East is uniquely positioned due to its high concentration of HNWI and UHNWI living within the region and its appeal among these types of travellers living outside of the region. This is driven in part by its unique blend of modern infrastructure and rich culture and heritage which is an important driver luring these high spending, discerning travellers. Oxford Economics datasets show that the distribution of income in

GCC countries is skewed towards higher income earning households. In 2024, Qatar and the United Arab Emirates were ranked first and second globally based on the proportion of high earning households, with approximately 40% and 25% of households, respectively, earning over \$250,000 annually.

This wealth translates into strong spending power which benefits

global destinations, including within the region. According to Mastercard Economics Institute, tourists from GCC countries are among the top spenders globally and this includes trips undertaken within the region itself. This is supported in Tourism Economics' datasets which show that international travellers from the region typically spend 50% more per trip than the global average.

## High Earning Households

Share of households earning over \$250k in 2024



Source: Tourism Economics, 2025





### Middle East pull: luxury travel

Analysis of Tourism Economics' 2024 Travel Trends Survey, a large-scale survey among consumers from eight key outbound markets, reveals that travellers drawn to the Middle East tend to spend more on travel overall than those who prefer to travel elsewhere. This group not only travels more frequently – averaging around 2 international trips per year, compared to around 1 trip per year among those who prefer other regions – they are also more likely to spend on high-end experiences. These findings highlight that the region is well-positioned as a magnet attracting luxury, high spending travel.

Luxury spend is a defining feature of these consumers' travel habits with nearly 60% habitually spending on luxury experiences while travelling compared to under 40% among travellers who favour other destinations. Indulging in luxurious experiences and staying at luxury hotels have also gained increased appeal among would-be travellers to the region. Indeed, these respondents were much more likely than other travellers to show piqued interest in premium experiences.



### Sport and music events

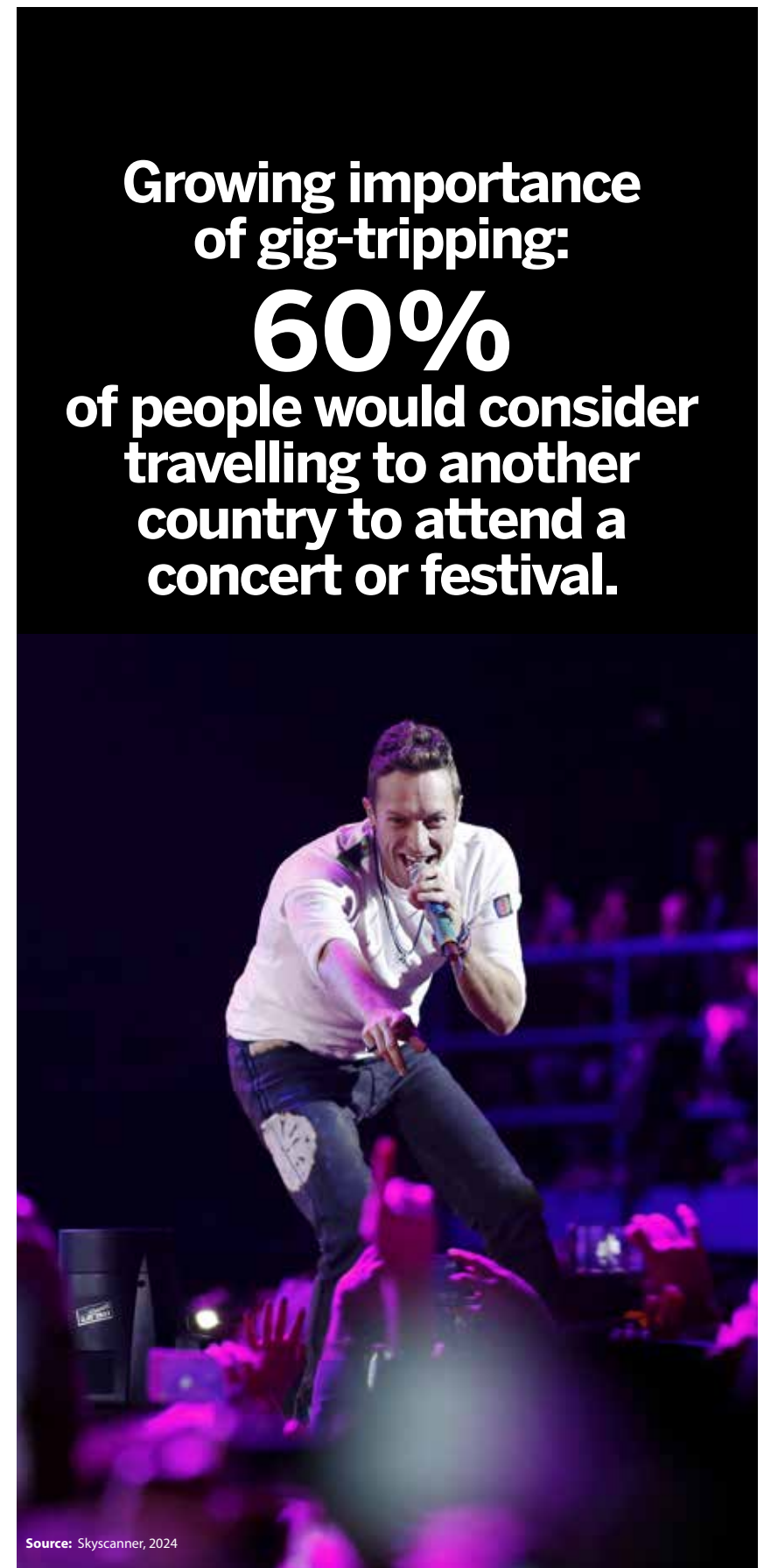
Global travel is set to benefit from the increased appeal of leisure events as consumers across the globe continue to embrace live performances in their quest for more meaningful connections and experiences.

There are sizeable opportunities for the Middle East to gain an increasing share of this growing opportunity following the success of mega events, including Qatar 2022 World Cup and Dubai Expo 2020, as well as the hosting of iterations of the AFC Asian Cup. Destinations across the region are positioning themselves as a centre for hosting a diverse array of leisure and business events.

In addition to forthcoming major events such as the Saudi Arabia 2034 World Cup and Qatar's hosting of the Rugby Nations Championship in 2028, countries across the region are poised to benefit from a growing calendar of social and cultural events.

Music is a key part of the region's event strategy. This aligns with an important, emerging global trend as music tourism has soared in interest due to 'gig tripping' as music becomes an increasingly powerful driver of travel decisions. Examples include major concerts by global superstars such as Coldplay, Ed Sheeran and Guns N' Roses in 2025 and a rich programme of festivals, including UNTOLD Dubai, an electronic music festival which welcomed some 185,000 attendees in 2024, and the Azimuth Festival in AlUla, a three-day music and cultural celebration which drew an estimated 600,000 attendees in 2024.

Bahrain also stands out for its reputation hosting music events. In October 2025, the country will host the 33rd iteration of its International Music Festival showcasing a variety of musical styles bridging eastern and western cultures.





Sport is also a key pillar to the region's event strategy with many sports playing an important role showcasing the country's impressive scenery and vast infrastructure. Football is an important part of this strategy as the most popular sport in the Middle East and as illustrated by the hosting of major tournaments. However, the sport is still gaining popularity following high-profile signings such as Cristiano Ronaldo's move to Al-Nassr in the Saudi Professional League, which is set to drive further intra-regional tourism as well as drawing in some longer-haul visitors for higher profile matches and tournaments.

Golf and motorsport are also important drivers of activity with the region hosting a prestigious end of season golf tournament in Dubai and four Formula 1 Grand Prix events in Bahrain, Saudi Arabia, Qatar, and Abu Dhabi in the 2025 calendar. Various cycling events such as the UAE Tour, Tour of Oman and the AlUla Tour are also important parts of the event calendar across the region attracting new and repeat visitors.

Meanwhile, esports, which has soared in popularity since the pandemic, is also a unique growth area in the region. Both Bahrain and Saudi Arabia are planning sizeable investments to develop esports events and facilities with the latter country becoming a titan for the sport through hosting the annual Esports World Cup, the world's largest esports event which inaugurated there in 2023. The event has already attracted large viewing figures including significant in-person attendance and is helping to drive new tourism to Riyadh.

**The sports industry in the Middle East is expected to grow annually by around 9% until 2026, more than double the rate of growth for the sector globally.**

Source: PwC, 2023

### **Younger, wealthier and adventurous: would-be visitors to the Middle East**

In this post-pandemic world consumers are demonstrating ever-shifting preferences when choosing destinations. Through understanding the needs and expectations of modern travellers there are opportunities to unlock additional value for destinations and travel businesses. Based on findings from Tourism Economics' Travel Trends Survey, some defining characteristics and attitudes of travellers interested in visiting the region are evident.

Age emerged as the most significant factor influencing interest in the region. Around half of those expressing interest in visiting the Middle East were under 35, despite this group representing 29% of the overall sample.

Furthermore, would-be visitors to the Middle East generally perceived themselves as being better-off financially compared to a year ago: 45% stated this compared with just 29% among the overall sample. This suggests that the region appeals more among financially confident travellers which aligns with its strong reputation for luxury travel.

Another dimension in which would-be visitors to the Middle East stand out is their interest in adventure, such as hiking, winter sports and nature-tourism, and niche activities, such as photography and painting. They were 30% more likely to prefer undertaking these types of activities while on holiday compared with other travellers.

**The Middle East appeals more to younger audiences and those who perceive themselves to be financially better off compared with travellers who prefer other destinations.**

Source: Tourism Economics, 2025

**Those interested in visiting the Middle East have elevated interest in adventure and niche activities.**

Source: Tourism Economics, 2025



### Target markets are embracing new technology

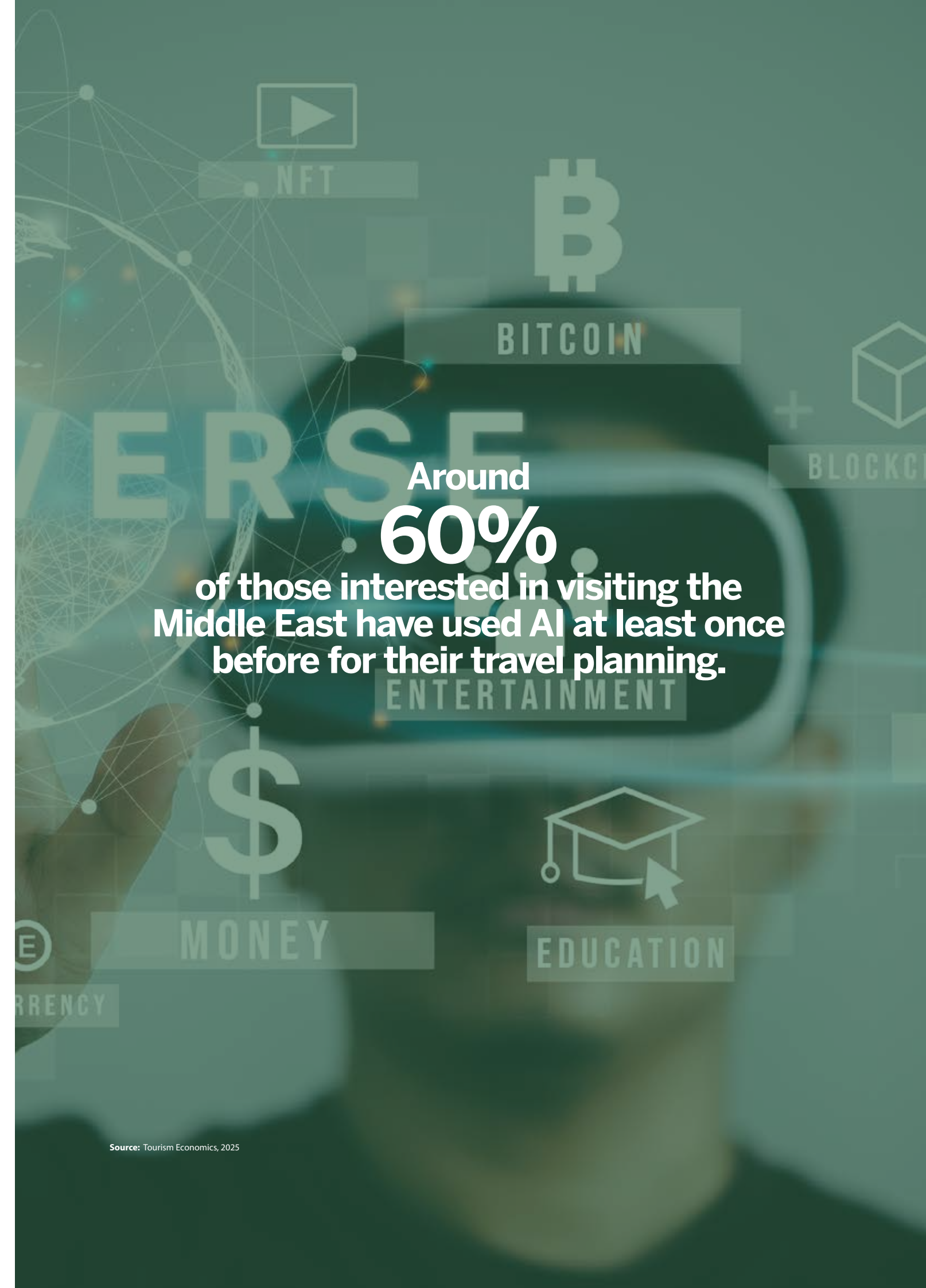
Reflecting their younger profile, those interested in going to the Middle East are also embracing technology. Over half stated they use social media to research and plan their trips which was significantly more compared to travellers interested in other destinations. Personalised recommendations and influencer content on social media are likely to be effective techniques for deepening engagement among this audience.

Artificial Intelligence (AI) also plays a comparatively more important role among would-be travellers to the Middle East. Nearly six in ten of those interested in visiting the region reported using AI at least once before for travel planning, while 21% used this technology ahead of their last trip. This was more than twice the level of usage compared with travellers interested in other destinations. These figures will likely rise as AI becomes more integrated in consumers' habits, highlighting the importance of adopting AI-driven tools to provide personalised recommendations and booking experiences for these tech-savvy segments.



**Reflecting their younger profile, would-be travellers to the Middle East are twice as likely as other travellers to use AI chatbots or virtual assistants.**

Source: Tourism Economics, 2025



**Around 60% of those interested in visiting the Middle East have used AI at least once before for their travel planning.**

Source: Tourism Economics, 2025





## 03. Regional Outlook

### Multiple segments spurring growth

Following ongoing investment across the region and improvements in connectivity and attractiveness, Middle East countries will continue to capture a large share of growing global demand. Total travel spending in the region, including domestic and inbound travel, is set to outpace wider global growth with an average annual rate of 7%

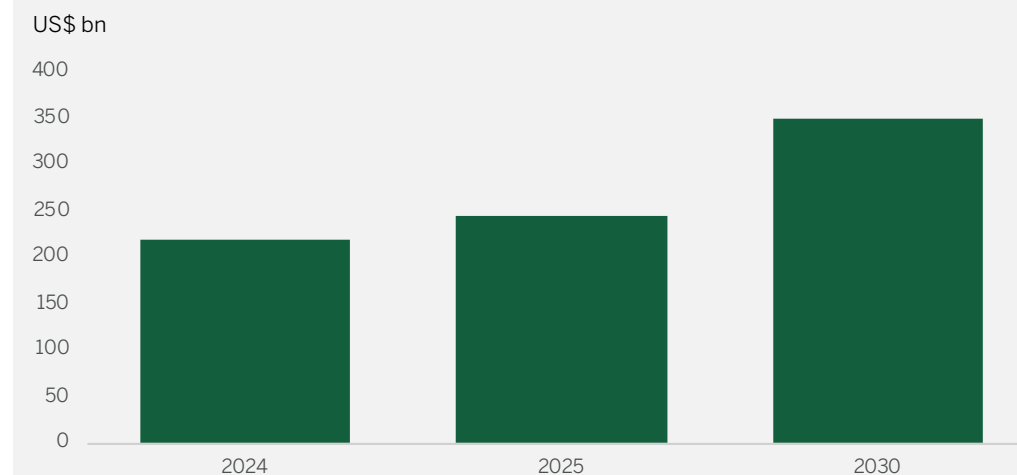
expected over the coming five years. Spending is set to rise to \$350 billion by 2030, up from \$220 billion in 2024 and \$160 billion in 2019; more than doubling in just over a ten-year period.

A similar pattern is evident for leisure travel, reflecting the region's diverse offering and continued

developments in attractions and infrastructure. Leisure travel spending is also outpacing the global average, albeit lagging the rapid growth in Asia Pacific which is boosted by the delayed recovery from the pandemic.

### Travel Spend

Total travel spend in the Middle East



Source: Tourism Economics, 2024

**Leisure travel spend in the Middle East is forecast to grow at 7% per year between 2025 and 2030, outperforming all global regions, except Asia Pacific.**

Source: Tourism Economics, 2025



However, spending growth in the region is most notable for business travel with almost double-digit growth rates expected, aided by its burgeoning reputation as a host for Business Events (M.I.C.E. Travel). The region's share of global business travel has already more than doubled since before the pandemic as more major Business Events (M.I.C.E. Travel) are held in the region, on top of the growth in transient business trips. The Middle East will be the second fastest growing region over the coming years to 2030 for business travel spending, with growth very close to that in Asia Pacific and outpacing growth in all other regions.

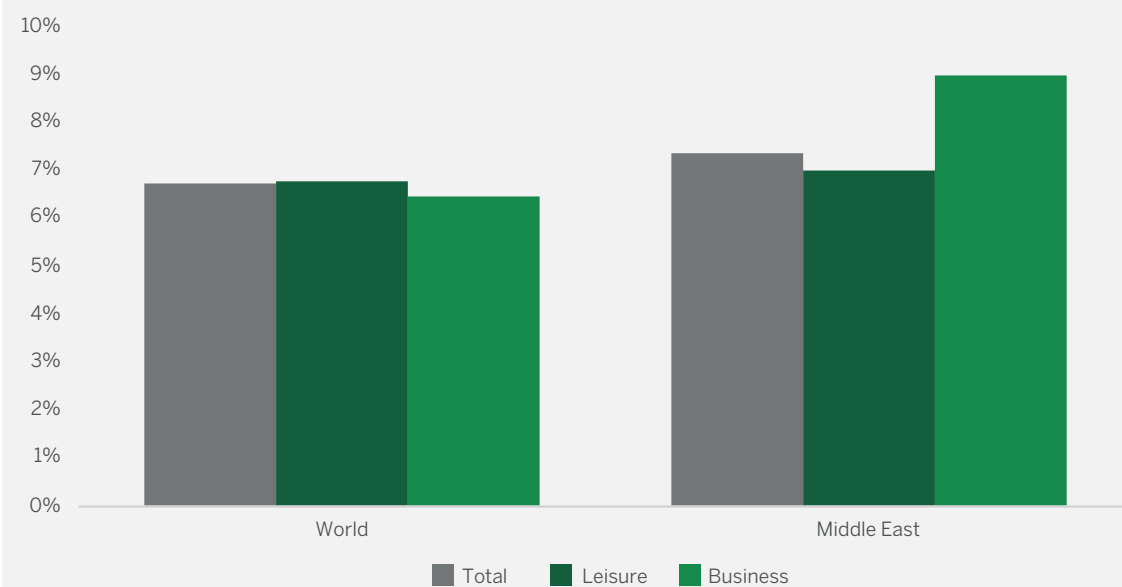
There remain considerable opportunities for destinations to take advantage of blended travel involving travel for both business and leisure purposes. Tourism Economics' Travel Trends Survey confirms that those warm to the Middle East are more likely to extend a business trip for leisure purposes. Among those interested in the Middle East, 37% reported

**Business travel spend growth of 9% per year between 2025 and 2030 is expected, well above the global average of 6% annual growth.**

Source: Tourism Economics, 2025

## Travel Spend Growth

Total travel spend annual growth (2025-30) by purpose of travel



Source: Tourism Economics, 2025

having combined business and leisure travel in the past, compared to 18% among those not interested in visiting the region.

In addition, travellers to the region appear to be more likely to work remotely. A third of those interested in travel to the Middle East said they have worked remotely before compared to 18% of those interested in visiting elsewhere. This highlights the region's strong appeal to digital nomads, a segment that has seen notable growth in recent years, which can bring significant levels of spending to destinations. With over half (52%) of those interested in going to the Middle East indicating they are allowed to work remotely, the region has a clear opportunity to further attract flexible workers in the future.

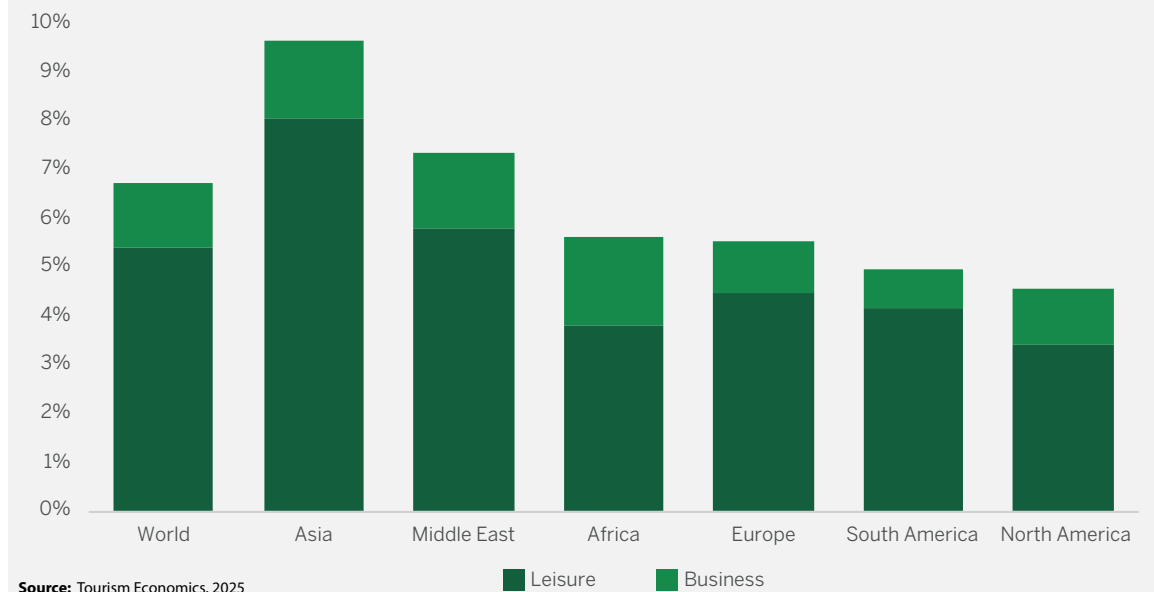
**Would-be visitors to the Middle East are more likely to undertake bleisure trips and work remotely compared to others interested in visiting elsewhere.**



Source: Tourism Economics, 2025

## Travel Spend Growth

Total travel spend annual growth (2025-30) by purpose of travel and contribution to growth for each purpose of travel by world region



Source: Tourism Economics, 2025



## Importance of religious travel

Ramadan 2025 has seen record numbers of visitors to historic and religious sites across Saudi Arabia underscoring the continued importance of religious tourism to the country and the region. The two Holy Mosques reported over 122 million visitors during the month of Ramadan. This included a large number of non-tourist worshippers, but also numbered over 16 million carrying out Umrah. To better manage such large visitor numbers, and to improve monitoring, new technology has been installed to monitor crowd sizes and flow.

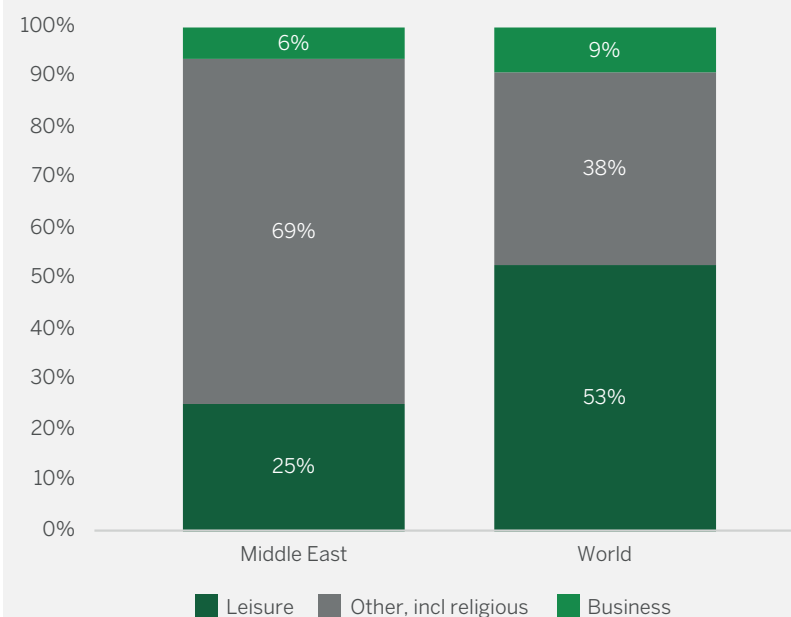
Over two-thirds of foreign nights spent in paid accommodation in the Middle East are for purposes other than business or leisure – a much higher proportion than in other regions due to this importance of religious travel.

Religious tourism contributes significant value for travel firms across the world. According to Grand View Research, the global religious tourism market was valued around \$300 billion in 2024 and is estimated to grow at a steep rate of 15% per year through to 2030. In the Middle East, religious tourism is on track to continue growing, and particularly for Saudi Arabia with further new investment in the holy cities. This will be supported by ongoing improvements in connectivity as well as rising income and wealth, and a growing middle class in some emerging markets which are home to large Muslim populations, such as Indonesia.



## International Tourism Nights

Share of international tourism nights in 2030 by purpose of travel



Source: Tourism Economics, 2025





## International demand will outpace domestic

International travel to and within the Middle East, including intraregional travel, is on course to outperform the global average over the coming five years. Total inbound nights are set to grow by 10% per year from 2025 to 2030. This means that by 2030, the number of paid accommodation nights in the region are expected to be almost double the level of 2024.

In 2026, the region is expected to mark an impressive new milestone as the volume of international tourism nights, including intraregional travel, is set to surpass domestic nights. Faster growth for international travel means that by 2030, international travel activity is anticipated to be nearly 50% higher than domestic. A key part of this growth is inbound travel among source markets outside of the region which is expected to grow by 13% per year.

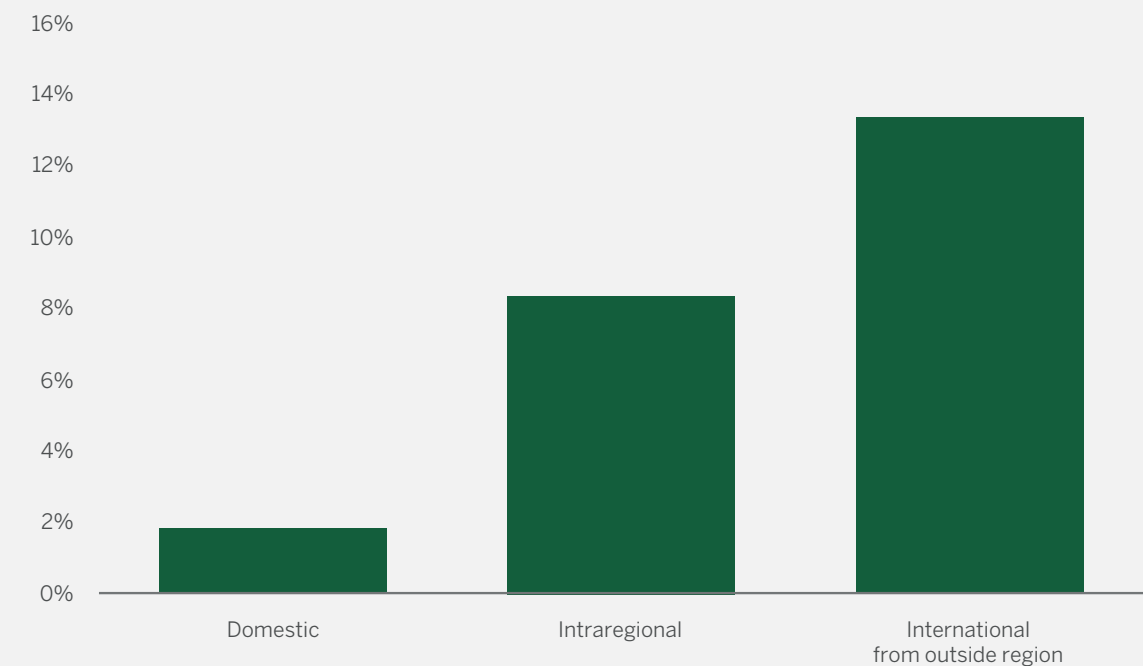
Looking at inbound travel from outside the region for leisure and business purposes, growth of 15% and 9% is expected per year from 2025-2030, respectively.

Related tourism revenue will also rise rapidly, with international visitor spending set to significantly outpace domestic. However, the relative pace of growth will be more modest as the composition of travel will continue to evolve. Luxury travel remains important with a high proportion of four- and five-star properties across the region, but there will also be continued development in other types of properties to attract additional travellers from major source markets to help meet the ambitious growth targets.



## Tourism Nights Growth

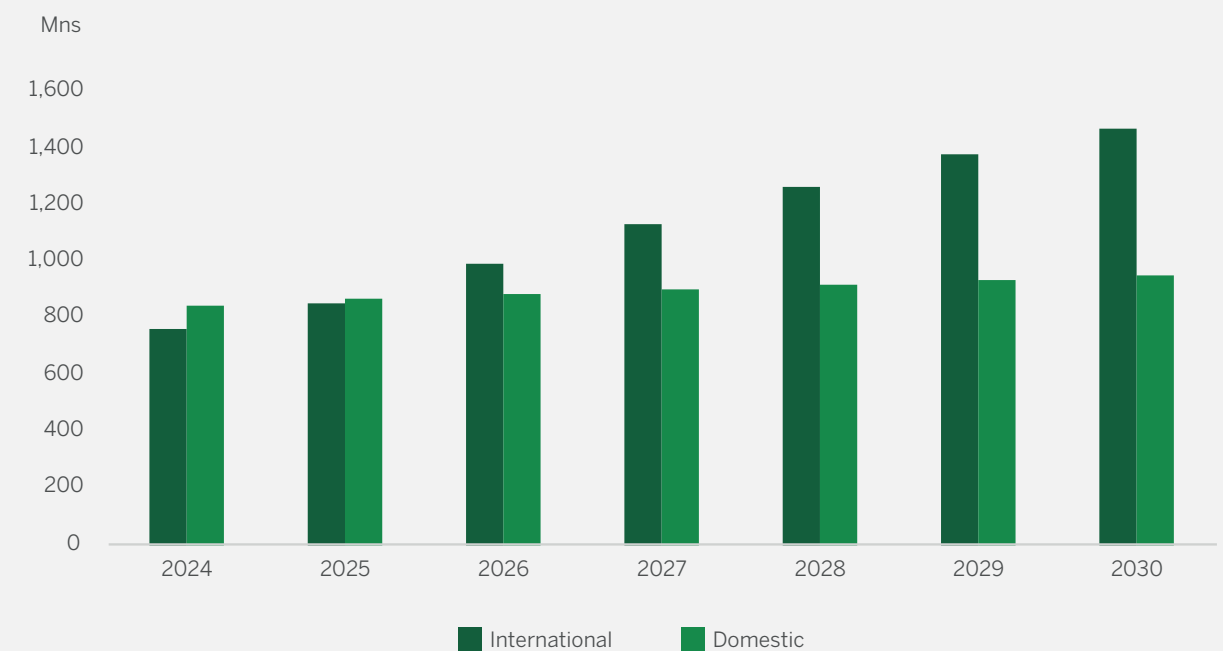
Annual tourism nights growth (2025-2030) in the Middle East by type of visitor



Source: Tourism Economics, 2025

## Tourism Nights

Volume of total tourism nights in the Middle East by type of visitor



Source: Tourism Economics, 2025

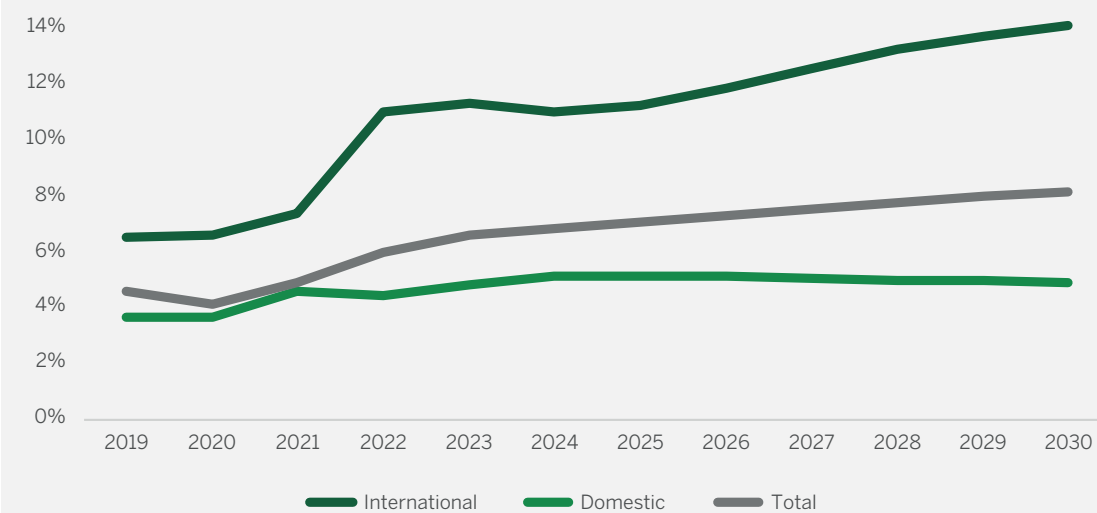


As the region undergoes strong growth in the coming years, it will account for a growing share of global travel demand. The Middle East region as a whole currently accounts for over 10% of all nights spent in paid accommodation on international trips worldwide, including intraregional travel. This proportion is up from 7% in 2019 helped by tourism infrastructure expansions in the region and improvements in connectivity, while some other destinations, notably those in Asia Pacific, remained closed for a more prolonged period due to the pandemic. The rapid growth now expected in Asia Pacific means that Middle East share will dip in the near-term before picking up again in line with continued destination development.



## Share of Tourism Nights

Middle East share of global tourism nights by type



Source: Tourism Economics, 2025

## Key source markets

The region's strategic location with strong and ever-improving connections to major Asian and European markets in addition to its well-established intraregional travel activity ensure that the Middle East continues to attract a diverse profile of visitors. It is also poised to gain share of the expanding African market.

This is an important feature of travel in the region as a weaker reliance on key individual source markets helps to insulate the travel industry from the impacts of economic shocks and shifting geopolitics, which is especially important in current times.

Short-haul intra-regional travel is less important to the Middle East than in many other destinations around the world, but this still accounts for roughly 40% of all cross-border activity and will continue to generate a significant proportion of travel demand in coming years. The number of nights spent in paid

accommodation from regional markets is expected to rise by over 60% in the years to 2030, driven by continued prosperity and strong cultural ties which help to buoy travel demand within the region.

Stronger growth is expected from medium- and long-haul markets which generates greater diversification in terms of source market demand. This is important as it reduces the region's dependence on a few large markets, making it more resilient to economic downturns. It also enhances stability by ensuring more consistent demand throughout the year and promotes sustainable growth by balancing seasonal fluctuations.

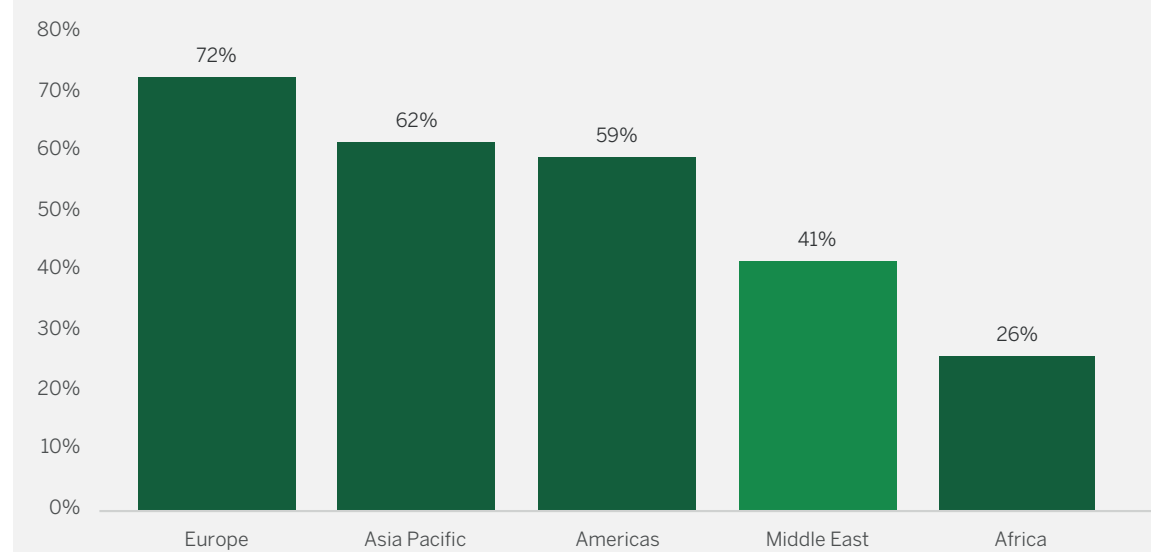
Travel from Asia Pacific markets is expected to lead the way for growth in the coming years with demand from some key markets still below pre-pandemic levels due to the later re-opening of borders. This growth represents some recovery to prior levels rather than pure expansion.

Africa is expected to be the second-fastest growing region for inbound activity over the next five years. During this period, Algeria and Egypt are expected to contribute 14% of the additional nights in the Middle East. Meanwhile, Morocco and Nigeria will add another 3% which further highlights the rising importance of African markets on tourism flows across the Middle East.

Egypt has recovered its position as a prominent source market outside the Middle East in terms of total visitor nights and is becoming increasingly important. In 2024, it accounted for 43 million visitor nights, marking a 150% increase from 2019, and even surpassing earlier travel volumes experienced in the prior peak year of 2013 as relationships across the region have normalised. Strong growth is expected to continue, aided by the expansion of Egypt's middle class which will enable a higher proportion of this populous Arab nation to travel within the

## Share of Intraregional Travel

Share of intraregional travel based on total tourism nights in 2024 by world region



Source: Tourism Economics, 2025



Middle East for leisure. Additionally, strong cultural and historical ties continue to support religious travel, further solidifying Egypt's role as a vital source market in the region.

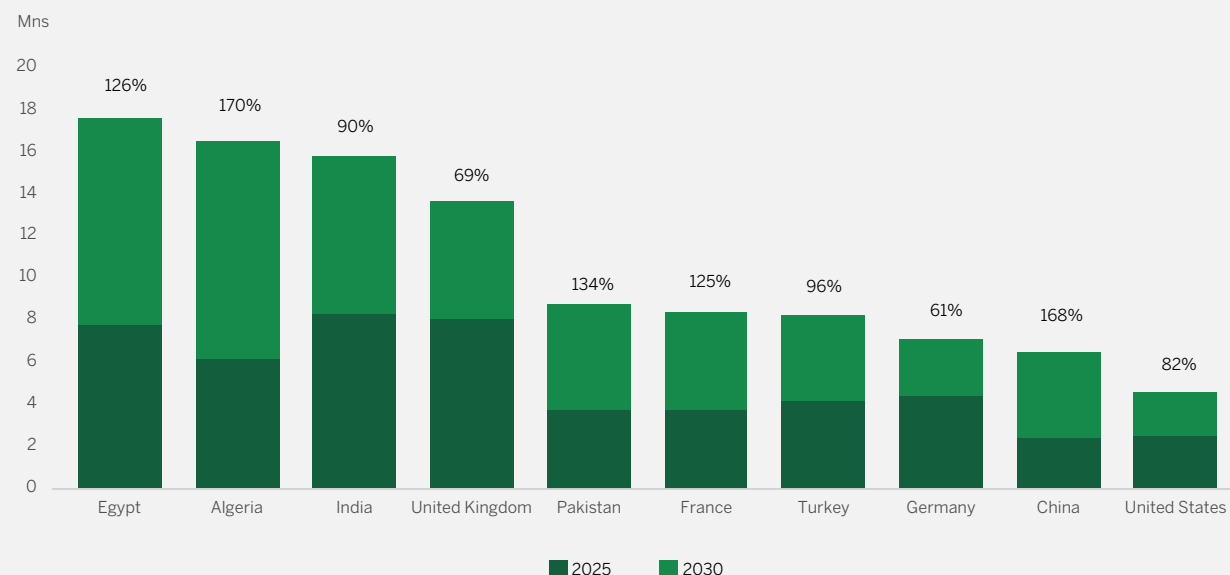
Beyond the immediate region and looking at travel activity, excluding travel for other purposes such as religious reasons, the importance of India and the UK is particularly pronounced. In 2025, these markets collectively account for 15% and 27% of inbound leisure and business travel demand, respectively, from outside the region.

**India and the UK  
are the top two  
source markets  
for travel into  
the region for  
leisure  
and business.**

Source: Tourism Economics, 2025

## International Leisure Tourism Nights

Volume of international leisure tourism nights in the Middle East and total growth (2025-30) from source markets outside region



Source: Tourism Economics, 2025

## Chinese leisure travellers remain high spenders

Destinations in the Middle East are benefitting from resurgent Chinese travel following the delayed reopening of its borders to international travel. Accessibility and safety are important considerations for Chinese travellers and the Middle East offers both of these factors. The availability of visa free travel to the United Arab Emirates and Qatar has supported rapid growth to these destinations, while Saudi Arabia has also benefitted since it was granted approved destination status. High air connectivity is also crucial for these destinations with regular flights available. Higher spending per night by Chinese travellers illustrates the continued importance of this market to destinations across the region.

This importance is further underlined as in 2025 China is expected to be the tenth largest leisure source market outside of the region in terms of volume, but the third largest in terms of visitor value.

**Leisure spend by Chinese  
visitors in the Middle East  
is expected to increase  
by around  
130%  
from 2024 to 2030.**

Source: Tourism Economics, 2025

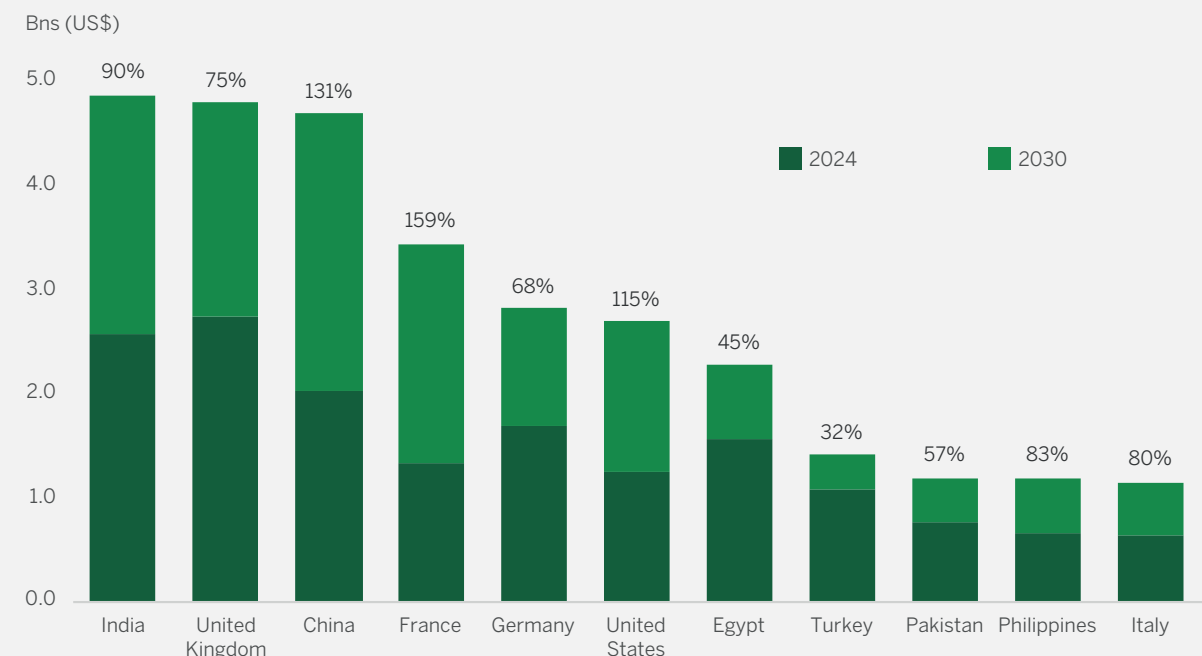


Europeans and North Americans also typically spend above average per visit and, hence, provide a higher economic contribution. This is particularly true for the leisure market which is more skewed towards European visitors.



## Leisure Travel Spend: Medium- and Long-Haul Source Markets

Leisure travel spend and spend growth (2024-30) in the Middle East by key medium- and long-haul source markets



## Importance of Indian travellers

India is a particularly important source market accounting for around 5% of all types of inbound travel to and within the region in 2024. Removing intraregional travel activity, the Indian market made up 10% of inbound travel to the Middle East in 2024 and 8% of leisure inbound.

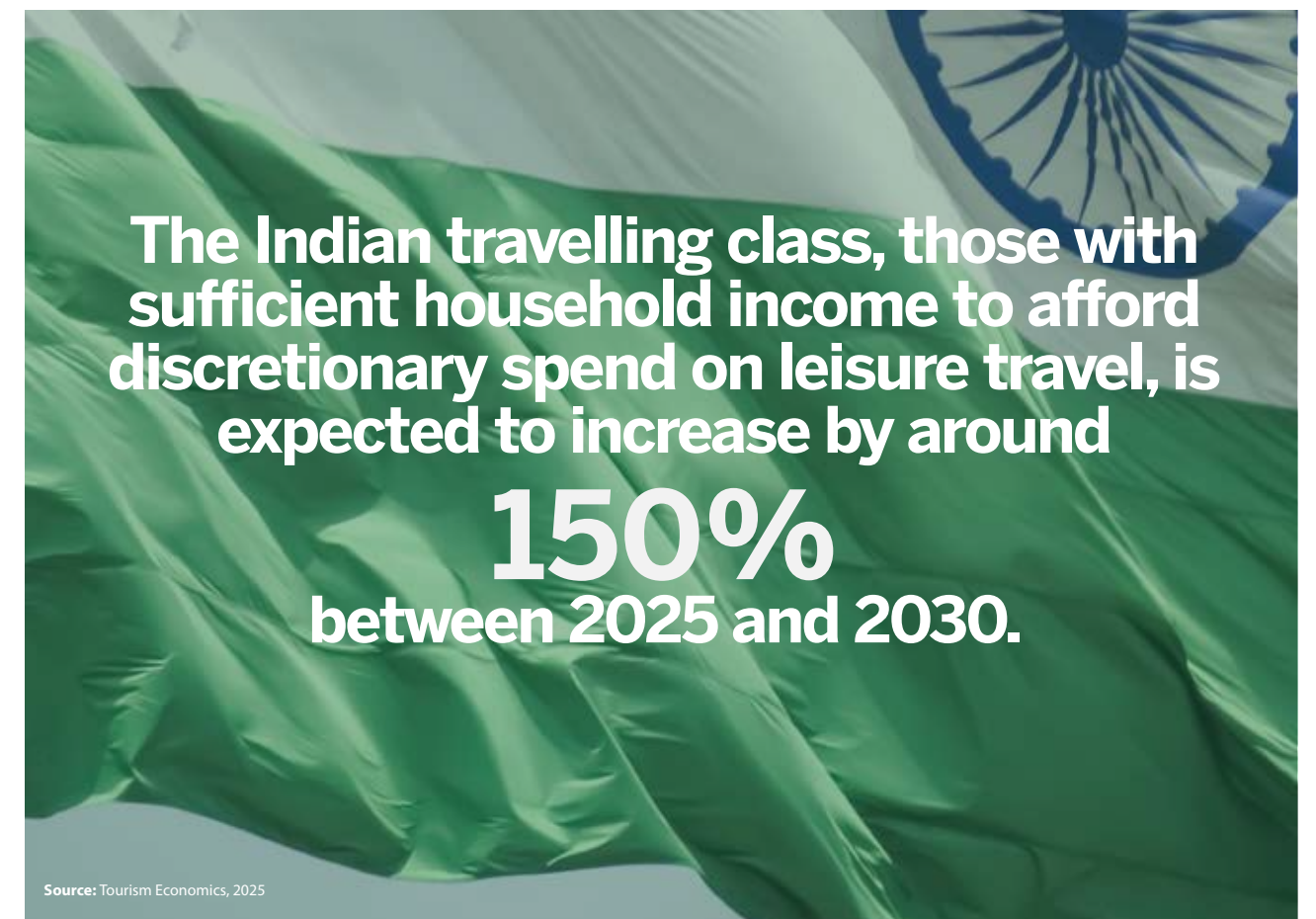
While Saudi Arabia is the top destination for India based on all types of travel, including travel for other purposes, the United Arab Emirates is the key destination for leisure travel. In 2024, Indian leisure travellers accounted for over 3 million nights across the Emirates. Dubai has particularly strong appeal benefitting from around 70% of the Indian inbound activity in 2024.

There is significant scope for Indian travellers to become increasingly valuable to the region's visitor economy. By 2030, the Indian outbound market is expected to become the top source market for travel to the region by volume. Annual average growth of 6% per annum between 2024 and 2030 is modest in comparison with some other growth in the region, but this still represents over 15 million more overnights and over \$2 billion in additional spending per year by 2030.

Growth from India will be driven by an increase in leisure travel which is set to rise at double-digit rates as a strong economy activates travel opportunities for a growing number of middle-class Indians. Indeed, by

2030, around 10 million extra Indian households compared with 2024 will be defined as travelling class with sufficient income to undertake overnight leisure travel. However, less than 5% of all households in India are expected to be defined as travelling class by 2030 which highlights the scope of the opportunity from the Indian market in subsequent years.

Countries in the Middle East are expected to benefit significantly from this rapid expansion given their relative proximity – typically accessible within a 3-to-5-hour flight time – and their strong cultural ties with the world's most populous nation.







# 04. Middle East Outbound

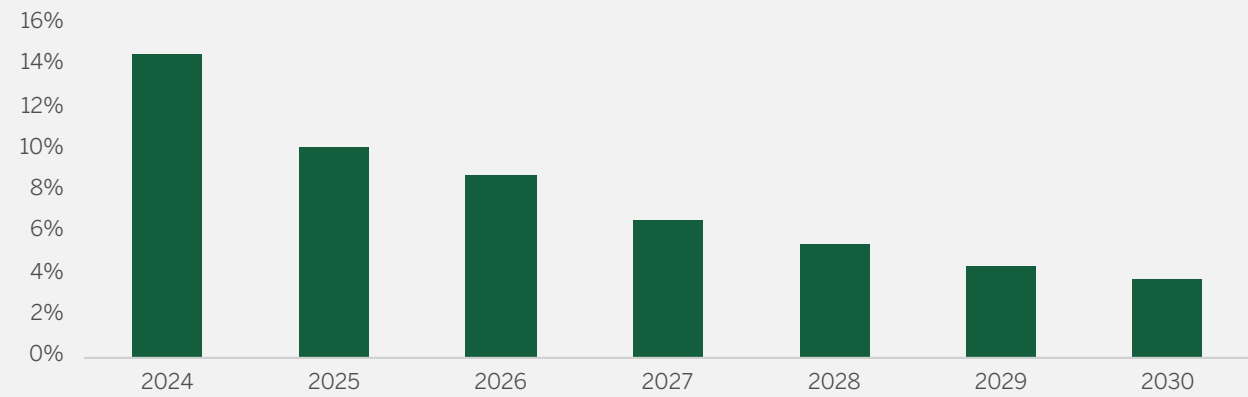
Outbound travel, both within the region and outside of the region, is an important element of travel activity in the Middle East which generates significant economic activity for travel agencies, tour operators and transport providers. This includes benefits to other countries and regions, but also has a significant impact on businesses within the region due to spending prior to travel, such as with travel agencies. Outbound flights on local carriers provide a large contribution to local economies.

Although there was weaker growth in the Middle East in 2024 compared with other parts of the world, the region is on track to achieve comparable outbound growth over the next five years. This means that outbound travel activity, including outbound travel to destinations within the region, is anticipated to grow by nearly 6% per year from 2025 to 2030.

The volume of  
outbound trips is  
expected to grow at an  
annual rate of over  
**5%**  
globally from  
2025 to 2030.

Source: Tourism Economics, 2025

**Outbound Trips Growth**  
Total global outbound trips annual growth



Source: Tourism Economics, 2025



## Growing outbound travel in the Middle East

Total outbound travel from and within the Middle East makes up nearly 5% of the global outbound market. In 2025, around 66 million international, including intraregional, trips are expected among residents of the region and by 2030 this figure is set to increase by a third to nearly 90 million. Meanwhile, the number of trips undertaken by Middle Eastern residents to destinations outside of the region is set to increase from around 30 million in 2025 to nearly 40 million in 2030, which constitutes annual growth of 5%.

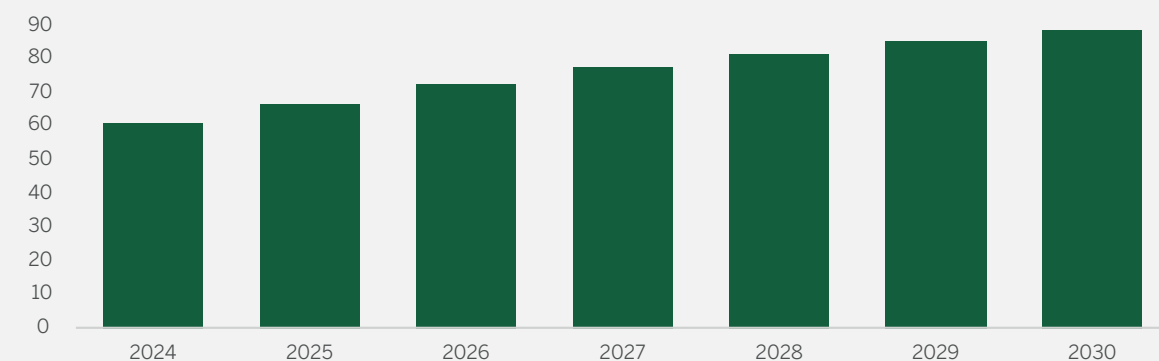
The Middle East surpasses the global average in outbound trips per capita, with the GCC countries leading the trend at more than double the world average. This is heavily influenced by strong appetite for leisure travel, high disposable incomes, and well-developed air connectivity in the advanced economies of the GCC bloc. Bahrain, in particular, stands out with one of the highest outbound travel rates in the GCC, driven predominantly by frequent short-haul, intraregional trips.

**Bahrainis have a particularly high propensity to undertake outbound travel. They are five times more likely than other GCC markets and more than 10 times likely compared to the global average to undertake outbound travel.**

Source: Tourism Economics, 2025

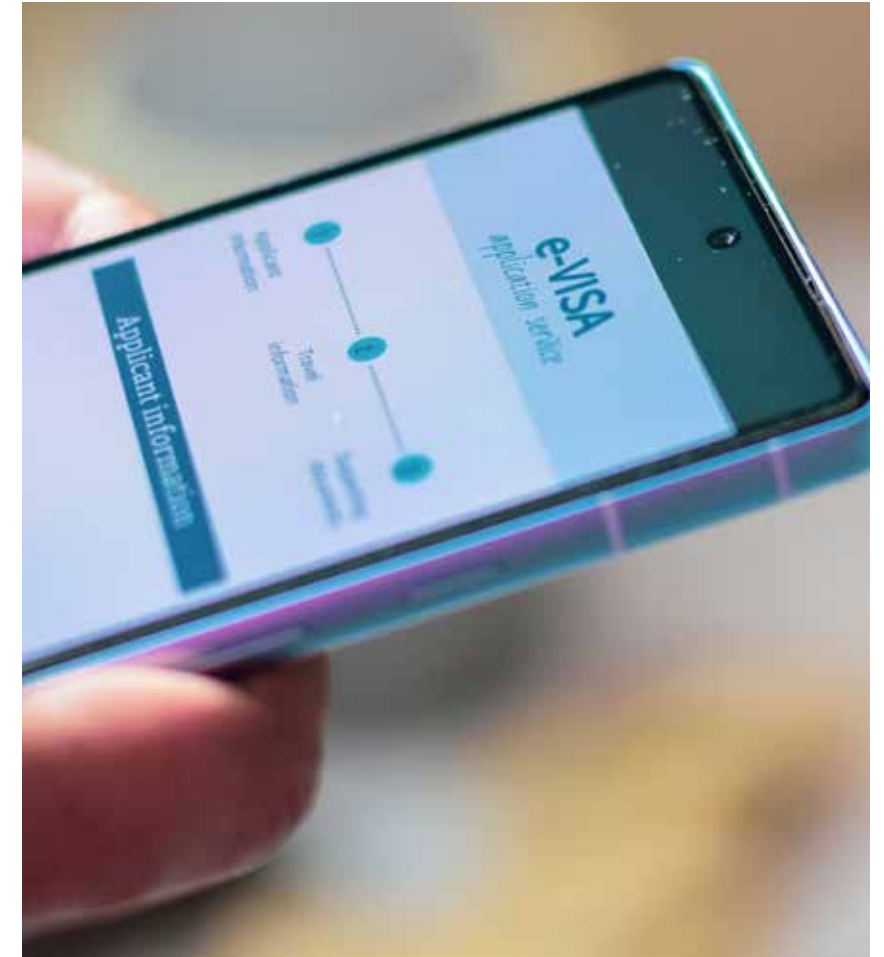
## Outbound Trips Volume of outbound trips in the Middle East

Mns

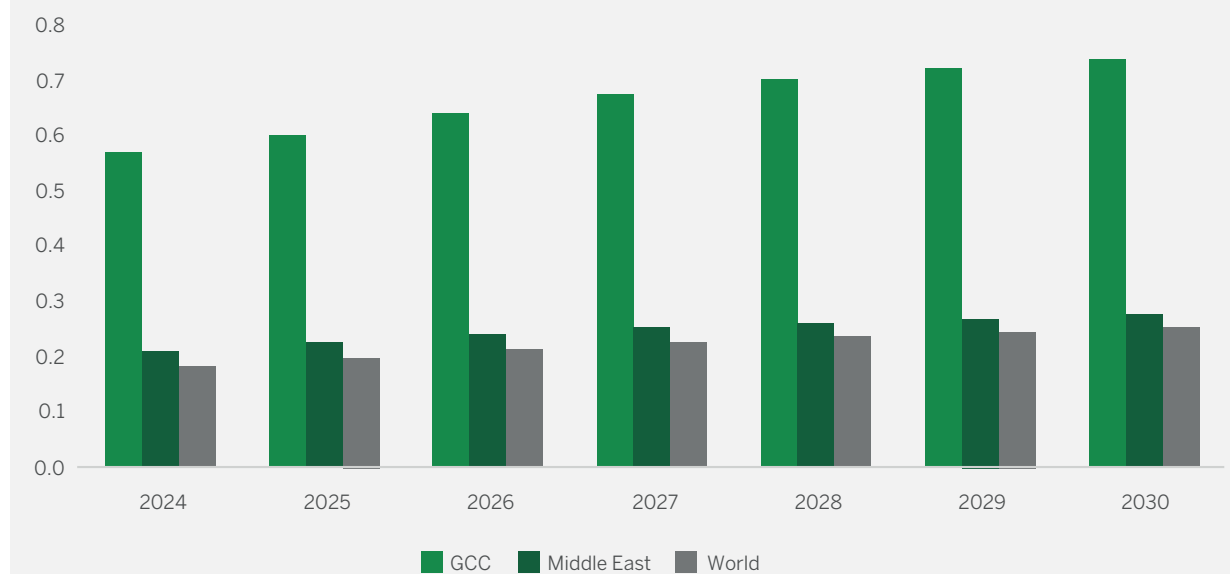


Source: Tourism Economics, 2025

Sustained growth over the next five years should be aided by improving intraregional and global connections and less restrictive visa policies, a broader trend which has facilitated increased travel globally. According to the latest Tourism Visa Openness report produced by the United Nations, visa requirements globally have become less stringent over the last decade. In 2023, under 50% of global travellers required a traditional visa which was notably fewer compared with 2018 (59%) and 2008 (77%). Expansions in e-visas among many countries in the region and the prospect of the unified GCC visa are regional examples which are anticipated to support more outbound travel activity in the coming years.



## Outbound Trips Per Capita Number of outbound trips per year per person



Source: Tourism Economics, 2025



## Balancing the books: domestic versus outbound travel

Outbound travel, including travel within and outside of the Middle East, is equivalent to just over half of domestic activity in terms of tourism nights but its overall spend impact is greater. This means that the outbound travel market in the region is lucrative with outbound travellers spending significantly more per night compared to domestic travellers. As a result, outbound travel accounts for nearly 60% of total Middle East resident spending on travel.

The proportion of travel spending on outbound is higher compared to other global regions as travellers from the Middle East have a higher propensity to travel abroad and, when they do, they tend to spend more per day and stay longer compared with other global travellers.

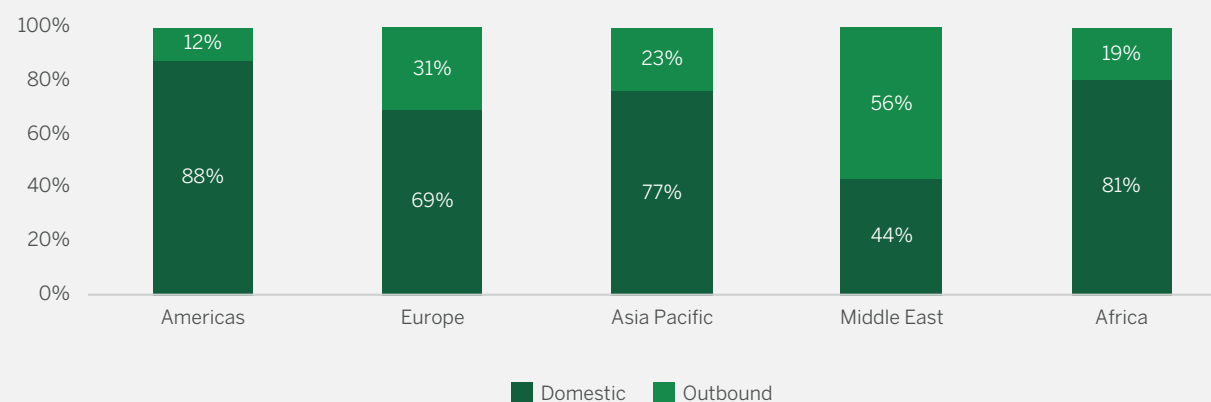
Outbound travellers from the Middle East have the second highest spend per night globally, behind Asia-Pacific travellers, which has traditionally been driven

**Middle East travellers are more likely to undertake international travel, and they typically spend more per day than other travellers.**

Source: Tourism Economics, 2025

## Share of Travel Spend

Share of travel spend in 2024 by type



Source: Tourism Economics, 2025

by elevated expenditure among Chinese travellers. In 2024, Middle Eastern outbound travellers spent \$255 per night across tourism sectors such as accommodation, food and beverage, and retail.

This high spending is supported by substantial disposable incomes in several GCC countries and strong product offerings commonly focused on luxury and high-end travel experiences which attract intraregional and global travellers.

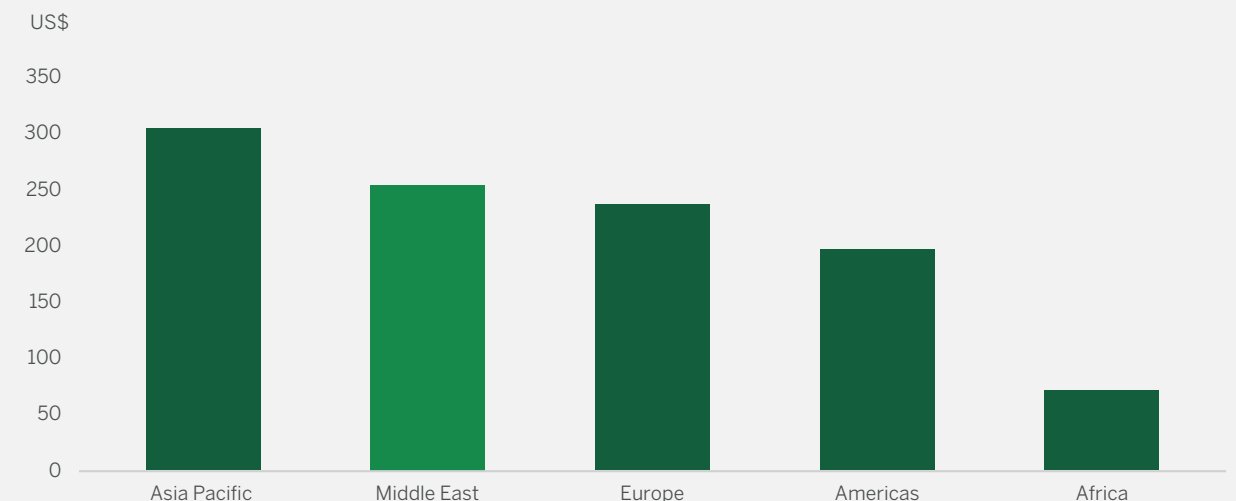
Total outbound spending on a per trip basis is further boosted as travellers from the Middle East undertake longer trips on average. Extended foreign trips are a frequent trend in the Middle East, particularly during the summer months, as residents seek to escape the region's extreme heat. As a result, the Middle East leads the way compared to other regions in average length of stay with outbound tourists averaging nearly 8 nights per trip, compared with around 5 nights and 4 nights among travellers from Asia Pacific and Europe, respectively.

**Outbound visitors from the Middle East undertake longer trips with an average of nearly 8 nights compared to around 4 nights among travellers who go elsewhere.**

Source: Tourism Economics, 2025

## Outbound Travel Spend Per Person Per Day

Average travel spend per person per day for outbound trips in 2024



Source: Tourism Economics, 2025



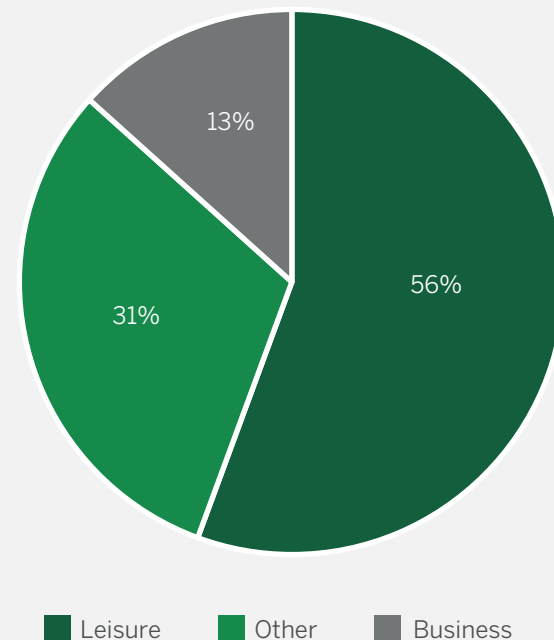
## Holiday travel dominant but business travel growing fastest

Travel for holiday purposes represents the largest share of outbound travel from and within the region, making up over half of outbound trips in 2024. This accounts for a higher proportion of nights and spend due to the longer stays and, consequently, higher spending on leisure trips.

However, the fastest growing segment for outbound travel is business travel which is on track to grow at an average rate of 7% per year from 2025 to 2030. This suggests more opportunities for travel firms to cater for an expanding pool of business travellers. Intraregional business travel is part of this growth due, in part, to the heightened importance of MICE events in the region and worldwide.

According to SAP Concur 2024 Global Business Traveler Research Report, modern business travellers are expressing more interest in sustainable travel options and AI-powered tools. Regional travel businesses can capitalise on the shifting demands of business travellers by tailoring services adapted to these evolving needs.

### Outbound Trips Share of outbound trips in the Middle East in 2024 by purpose of travel



Source: Tourism Economics, 2025

### Outbound Trips Growth

Outbound trips annual growth in the Middle East by purpose of travel



Source: Tourism Economics, 2025

## Key outbound markets

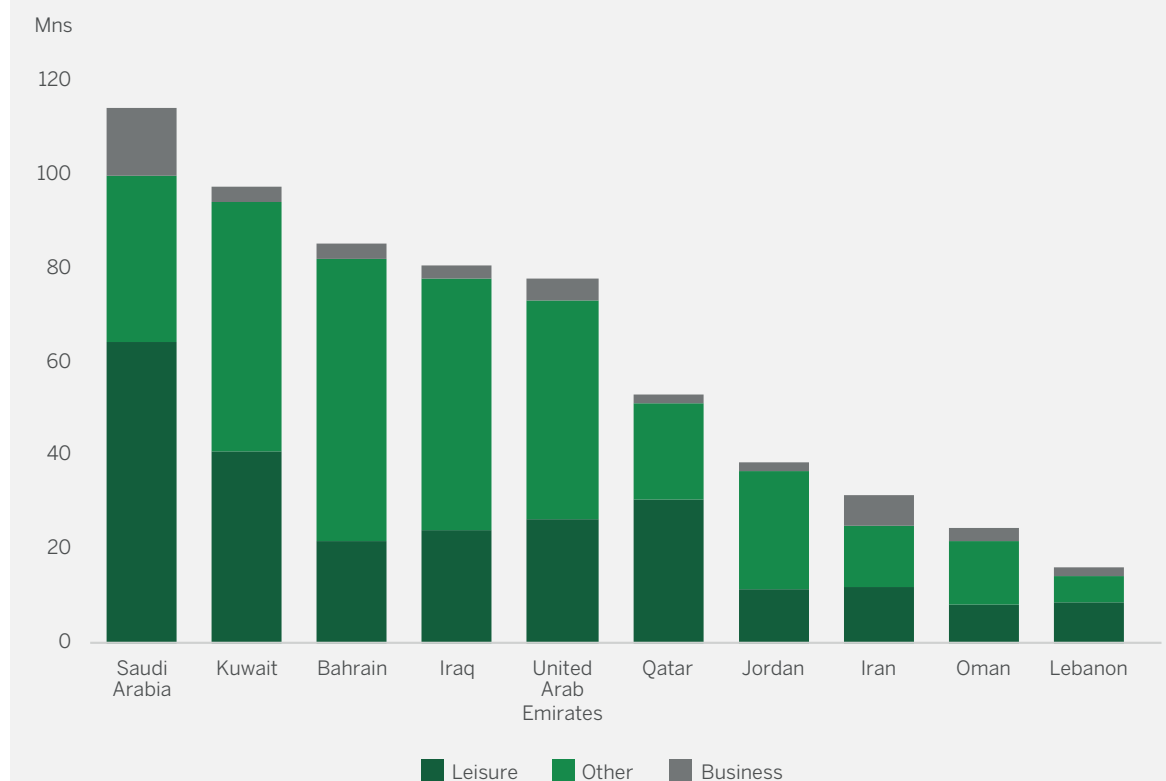
Being the most populous nation in the region, Saudi Arabia accounts for the largest share of the outbound travel market. In 2024, the Kingdom accounted for over 90 million outbound tourism nights, which represented around 20% of all outbound travel in the region. By the turn of the next decade, this market is expected to provide over 110 million outbound tourism nights, making it the 19th largest outbound market globally. Travel experiences remain an important and growing priority among Saudis which is particularly marked as this growth is expected despite domestic market developments which will encourage a greater share of travellers to remain at home.

**Saudi Arabia will be the largest outbound travel market in the region by 2030, with over 110 million outbound tourism nights.**

Source: Tourism Economics, 2025

### Outbound Visitor Nights

Volume of outbound tourism nights in 2030 by purpose of travel



Source: Tourism Economics, 2025



By 2030, Kuwait is expected to become the second-largest outbound market in terms of total nights. This growth in outbound tourism will be fuelled by enhanced air connectivity and ongoing infrastructure development on top of the existing land infrastructure and large drive market. This includes a large proportion of religious travel across the border to Saudi Arabia, with a similar dynamic evident for Bahrain.

Kuwait Airways has embarked on an ambitious expansion strategy to compete with larger regional airlines. In recent years, the airline has significantly increased its capacity, adding key routes to major international destinations, including London, Amsterdam, Munich, and

Vienna. Growth is further supported by major infrastructure investments. A new terminal at Kuwait International Airport, set to open in 2027, aims to enhance passenger capacity and streamline operations. Additionally, Kuwait Airways is expanding its fleet from 33 to 39 aircraft within the next three years, strengthening its ability to serve the increasing demand for international travel.

Bahrain has also made significant investments in its air capacity and infrastructure to position itself as a key transit hub in the region. The expansion of Bahrain International Airport has played a crucial role in this strategy, with increased flight frequencies and new routes improving connectivity to major global destinations.

Despite having a smaller market size compared to its GCC neighbours, Bahrain boasts a high outbound travel rate relative to its population. On average in 2024, Bahraini residents undertook 3.0 outbound trips per person, significantly above the GCC average of 0.6 trips per person. This is due to the combination of high disposable income, more limited domestic options and the proximity of Saudi Arabia.



## Near neighbours benefit most from outbound

Near neighbours are the major destinations for outbound travel among residents in the Middle East. Saudi Arabia, Turkey and United Arab Emirates, account collectively for 39% of all outbound trips expected in 2025.

Religious travel is a large proportion of this regional travel. This is evident in the regional data within the 'other travel' category – non-business and non-leisure travel – which accounts for two-fifths of total intraregional outbound travel. This is significantly higher than the proportion of travel for this purpose in other global destinations. Saudi Arabia accounts for a high proportion of this intra-regional travel illustrating the importance of the religious travel segment.

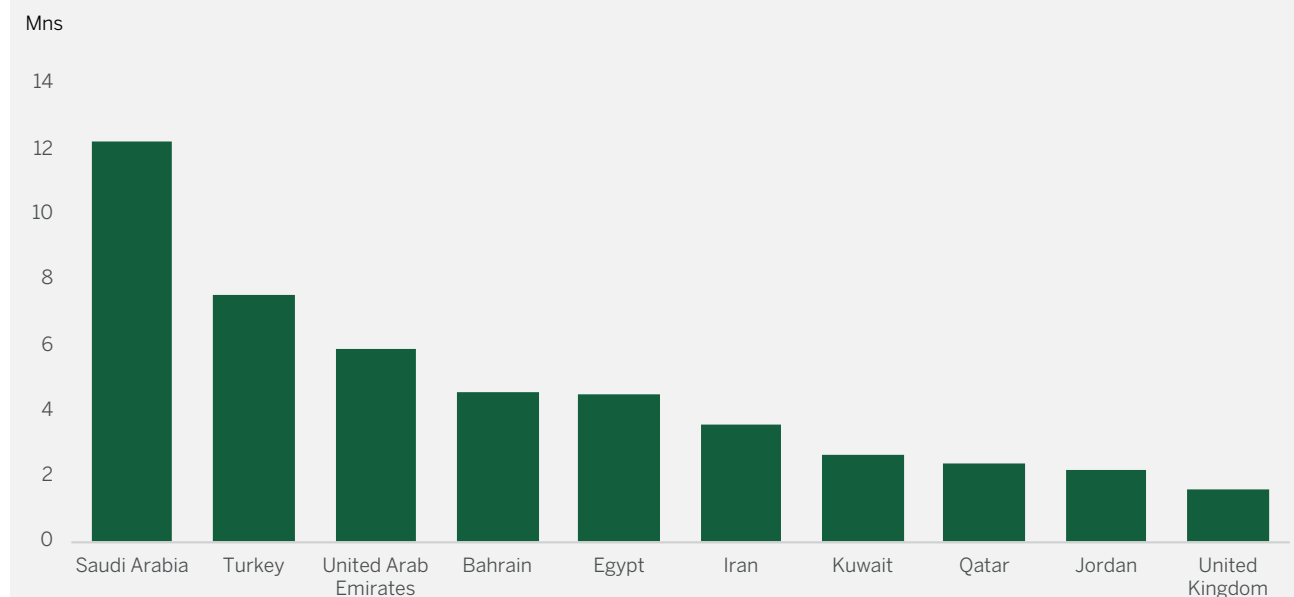
In 2024, close neighbours Turkey and Egypt were confirmed as the leading outbound destinations outside the region, accounting for 19% of outbound travel. Further afield, the top destinations were the United Kingdom, France, and Italy, collectively representing 6% of trips.

As major countries like the United Arab Emirates, Saudi Arabia, and Qatar have sought to diversify their economies and prioritise tourism development, there has been a substantial increase in investments directed toward leisure and business infrastructure. As a result, intra-regional travel for these purposes will also continue to grow.

Total intraregional travel was around 34 million trips in 2024 and this is expected to grow by 47% to just over 50 million trips by 2030. This is forecast to represent almost 60% of total outbound travel in the Middle East. Rather than being an economic leakage this high level of activity will be a key driver of growth across the region. Associated spending growth will be more modest as savings on a per trip basis are expected, but this will still amount to over \$86 billion in 2030, which should be just over half of all outbound travel spending.

## Largest Destination Markets

Volume of outbound trips from the Middle East in 2025  
Top 10 markets



Source: Tourism Economics, 2025



Overall tourism spending on  
intraregional travel is  
expected to grow by

**37%**  
from  
**\$63 billion**  
in 2025 to  
**\$86 billion**  
in 2030.

Source: Tourism Economics, 2025

### Strategic importance of medium- and long-haul destinations

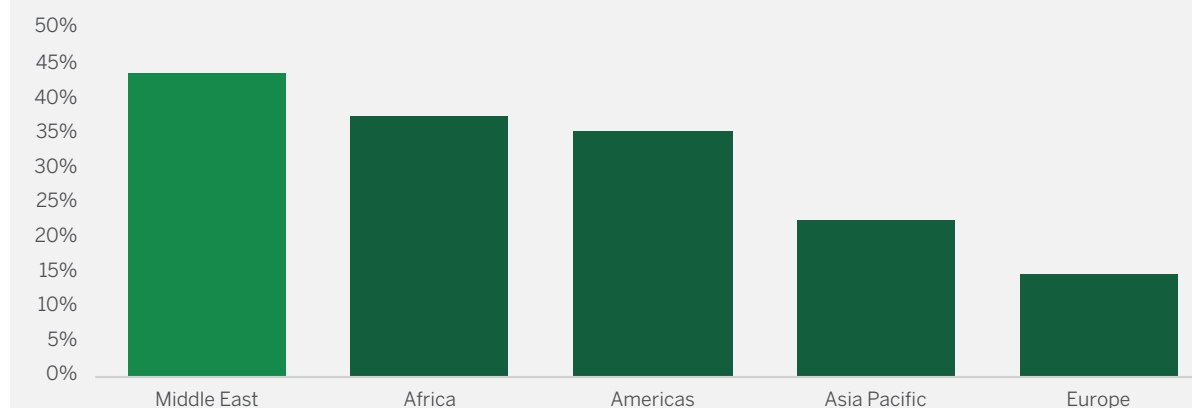
By 2030, the collective share of traditional outbound travel destinations is expected to decline as emerging destinations gain prominence and the travel landscape becomes more diverse. Countries such as India, Thailand and Poland are projected to attract a growing number of visitors from the Middle East, reflecting shifting travel preferences and expanding destination options.

Significantly higher than in other regions, over 40% of all outbound trips, including intraregional trips, undertaken by Middle Eastern residents are to medium- or long-haul destinations. This higher share suggests a strong preference for further flung destinations, supported by higher disposable incomes that facilitate more long-haul trips. Additionally, it highlights the Middle East's status as a global aviation hub, offering extensive connectivity to distant destinations.



### Share of Outbound Trips: Medium- and Long-Haul Destinations

Share of outbound trips to medium- or long-haul destinations in 2024 by world region



Source: Tourism Economics, 2025



**Emerging destinations are gaining prominence as outbound travel from the Middle East to countries such as Croatia, Poland, and Hungary is projected to grow rapidly, with a CAGR of 18%, 16%, and 12%, respectively, from 2025 to 2030.**

Source: Tourism Economics, 2025

**The Middle East has the highest share of outbound medium- and long-haul travel among global regions with over 40% of outbound trips to more distant destinations.**

Source: Tourism Economics, 2025

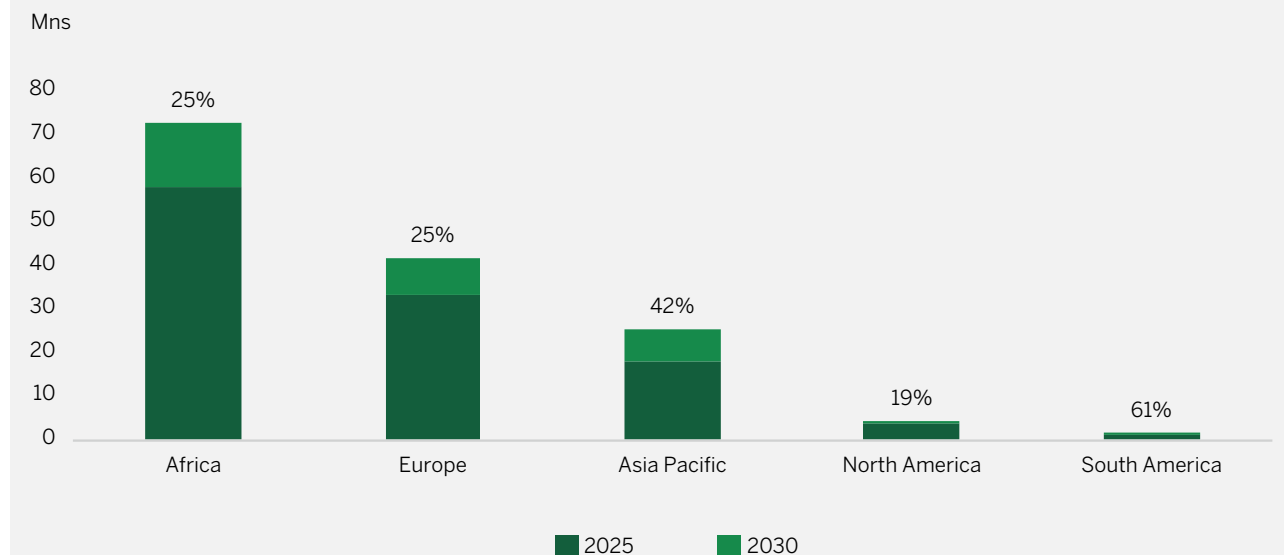
## Longer-haul travel remains dynamic

Heavily influenced by the appeal of Egypt, Africa is the key destination for outbound leisure travel to destinations outside of the Middle East. In 2025, outbound leisure nights to African destinations is expected to account for just over 50% of the market. This is set to moderate slightly to 46% in 2030 as increased growth in travel to Asia Pacific destinations

develops. Thailand in particular is set to welcome a growing number of travellers from Middle East countries, with over 10 million extra tourism nights expected in 2030 compared with current activity. The UK is also poised to benefit more over the next five years with nearly 10 million extra tourism nights expected from Middle Eastern travellers by 2030.

## Outbound Leisure Tourism Nights

Volume of outbound leisure travel nights and total growth (2025-30) from the Middle East by destination world region (excluding Middle East)



Source: Tourism Economics, 2025

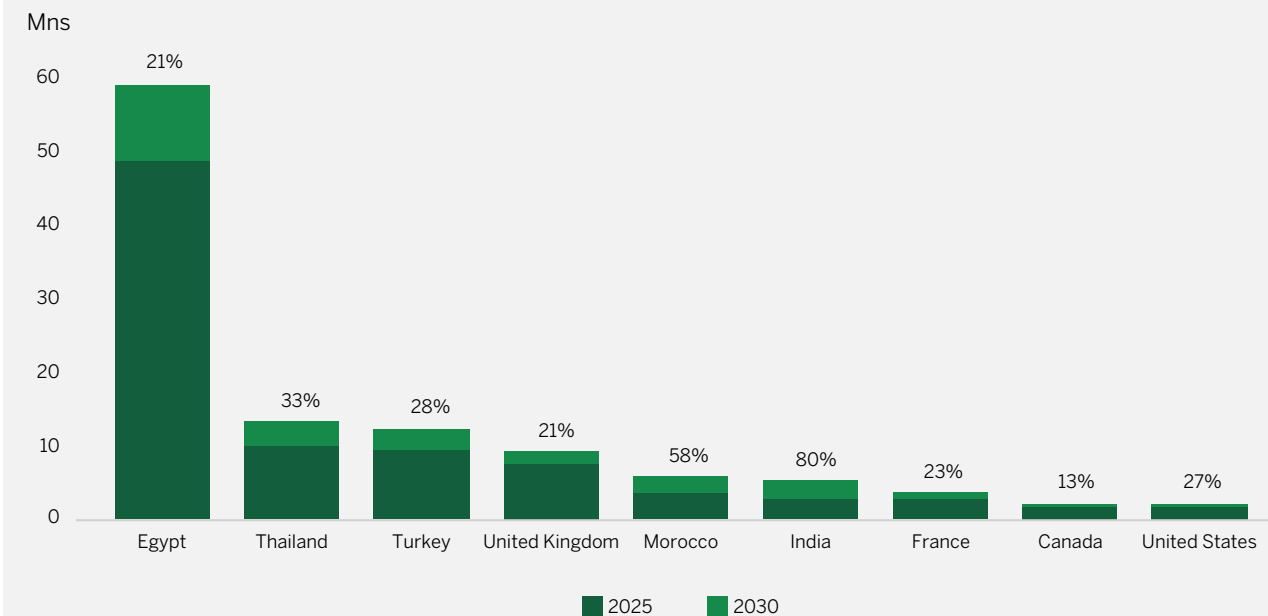
**Thailand is a standout destination as Asia Pacific is taking a growing share of outbound travel from the Middle East.**

Source: Tourism Economics, 2025



## Outbound Leisure Tourism Nights: Largest Destinations

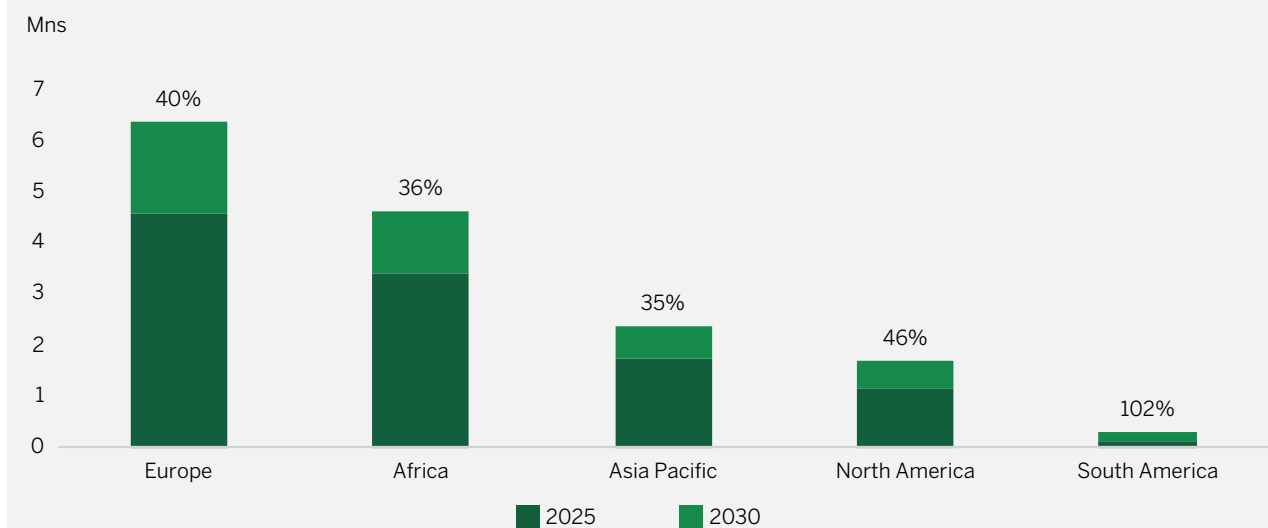
Volume of outbound leisure nights to destinations outside Middle East and total growth (2025-30)



Meanwhile for outbound business travel outside of the region, Europe is the key destination making up 40% of activity. Underscoring growing opportunities in the business travel sector, there is significant growth of over 30% expected for outbound travel to world regions over the next five years.

## Outbound Business Tourism Nights

Volume of outbound business travel nights and total growth (2025-30) from the Middle East by destination world region (excluding Middle East)



## Outbound travel: 2030

By 2030, the outbound travel market in the Middle East, which includes intraregional travel activity, is expected to generate expenditure of over \$160 billion compared to around \$117 billion in 2024. For each segment of outbound travel this represents

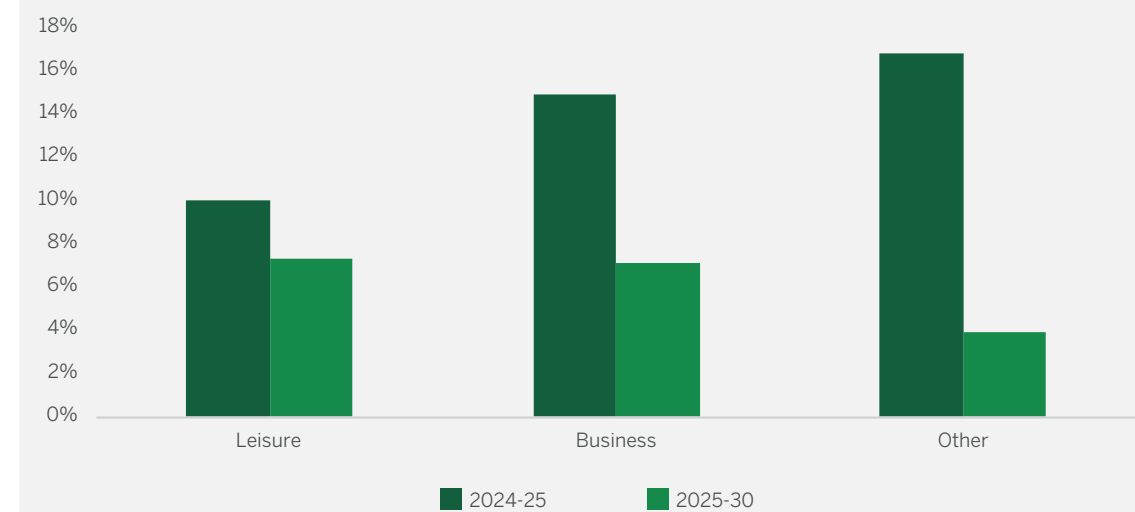
CAGR of 4% or more between 2025 and 2030.

Based on outbound travel outside of the region, there is similar robust growth expected with each segment set to grow by 5% or more per year over the next

five years. This means by 2030, outbound travel spend by Middle Eastern residents in destinations outside of the region should surpass \$60 billion.

## Outbound Travel Spend Growth

Outbound travel spend annual growth in the Middle East by purpose of travel



Outbound travel spend by Middle East residents in destinations beyond the region is expected to grow by around

# 6%

per year over the next five years.

Source: Tourism Economics, 2025



# 05. Country & City Overview

## Saudi Arabia

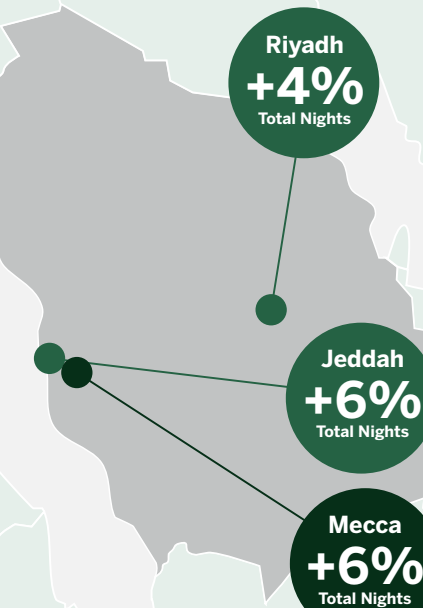


Total Nights:  
**+8%**  
(CAGR +8% 2025-30)

Domestic Nights:  
**+4%**  
(CAGR +2% 2025-30)

Inbound Nights:  
**+12%**  
(CAGR +14% 2025-30)

Outbound Nights:  
**+7%**  
(CAGR +3% 2025-30)



## INBOUND

### Top 3 Source Markets % of Nights from Source Markets Outside of Region

- Pakistan - 14%
- Algeria - 14%
- Egypt - 12%

### Travel Purpose % of Total Inbound Nights

- Leisure - 14%
- Business - 3%
- Other - 83%

## TRAVEL SPEND 2025 vs. 2024

- Leisure Spend:  
**+14%**
- Business Spend:  
**+29%**
- Inbound Spend:  
**+20%**
- Domestic Spend:  
**+9%**

## OUTBOUND

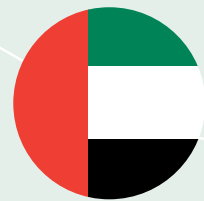
### Top Destinations % of Outbound Nights Outside of Region

- Egypt - 45%
- Morocco - 19%
- U.K. - 7%





## United Arab Emirates



**Total Nights:**  
**+10%**  
(CAGR +6% 2025-30)

**Domestic Nights:**  
**+4%**  
(CAGR +4% 2025-30)

**Inbound Nights:**  
**+11%**  
(CAGR +6% 2025-30)

**Outbound Nights:**  
**+10%**  
(CAGR +11% 2025-30)

**Abu Dhabi**  
**-1%**  
Total Nights

**Dubai**  
**+14%**  
Total Nights

### INBOUND

**Top 3 Source Markets**  
% of Nights from Source Markets  
Outside of Region

- India - 17%
- U.K. - 11%
- China - 6%

**Travel Purpose**  
% of Total Inbound Nights

- Leisure - 35%
- Business - 25%
- Other - 39%

**TRAVEL SPEND**  
2025 vs. 2024

- Leisure Spend: +1%
- Business Spend: +5%
- Inbound Spend: +1%
- Domestic Spend: +3%

### OUTBOUND

**Top Destinations**  
% of Outbound Nights  
Outside of Region

- U.K. - 31%
- Thailand - 12%
- France - 5%



## Bahrain



**Total Nights:**  
**+4%**  
(CAGR +3% 2025-30)

**Domestic Nights:**  
**-1%**  
(CAGR +3% 2025-30)

**Inbound Nights:**  
**+4%**  
(CAGR +3% 2025-30)

**Outbound Nights:**  
**+1%**  
(CAGR +6% 2025-30)

**TRAVEL SPEND**  
2025 vs. 2024

- Leisure Spend: +1%
- Business Spend: +16%
- Inbound Spend: +8%
- Domestic Spend: +4%

### INBOUND

**Top 3 Source Markets**  
% of Nights from Source Markets  
Outside of Region

- India - 46%
- U.K. - 9%
- Philippines - 7%

**Travel Purpose**  
% of Total Inbound Nights

- Leisure - 82%
- Business - 4%
- Other - 14%

**OUTBOUND**  
**Top Destinations**  
% of Outbound Nights  
Outside of Region

- Egypt - 41%
- U.K. - 22%

### INBOUND

**Top 3 Source Markets**  
% of Nights from Source Markets  
Outside of Region

- Pakistan - 29%
- Turkey - 22%
- Armenia - 7%

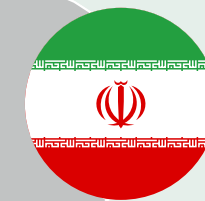
**Travel Purpose**  
% of Total Inbound Nights

- Leisure - 60%
- Business - <1%
- Other - 40%

**OUTBOUND**  
**Top Destinations**  
% of Outbound Nights  
Outside of Region

- Turkey - 64%
- Canada - 9%

## Iran



**Tehran**  
**+6%**  
Total Nights

**Total Nights:**  
**+0%**  
(CAGR +1% 2025-30)

**Domestic Nights:**  
**-1%**  
(CAGR +1% 2025-30)

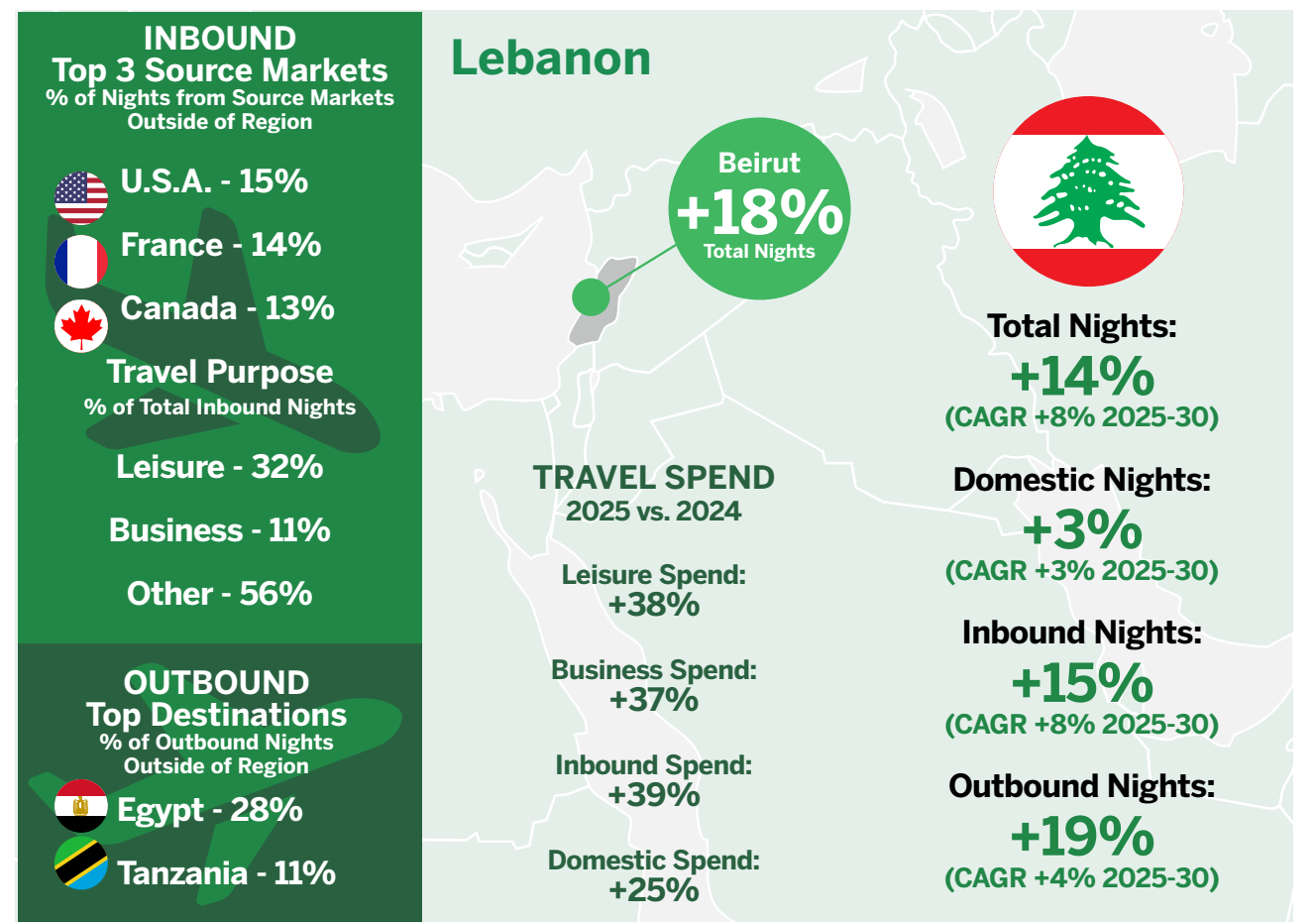
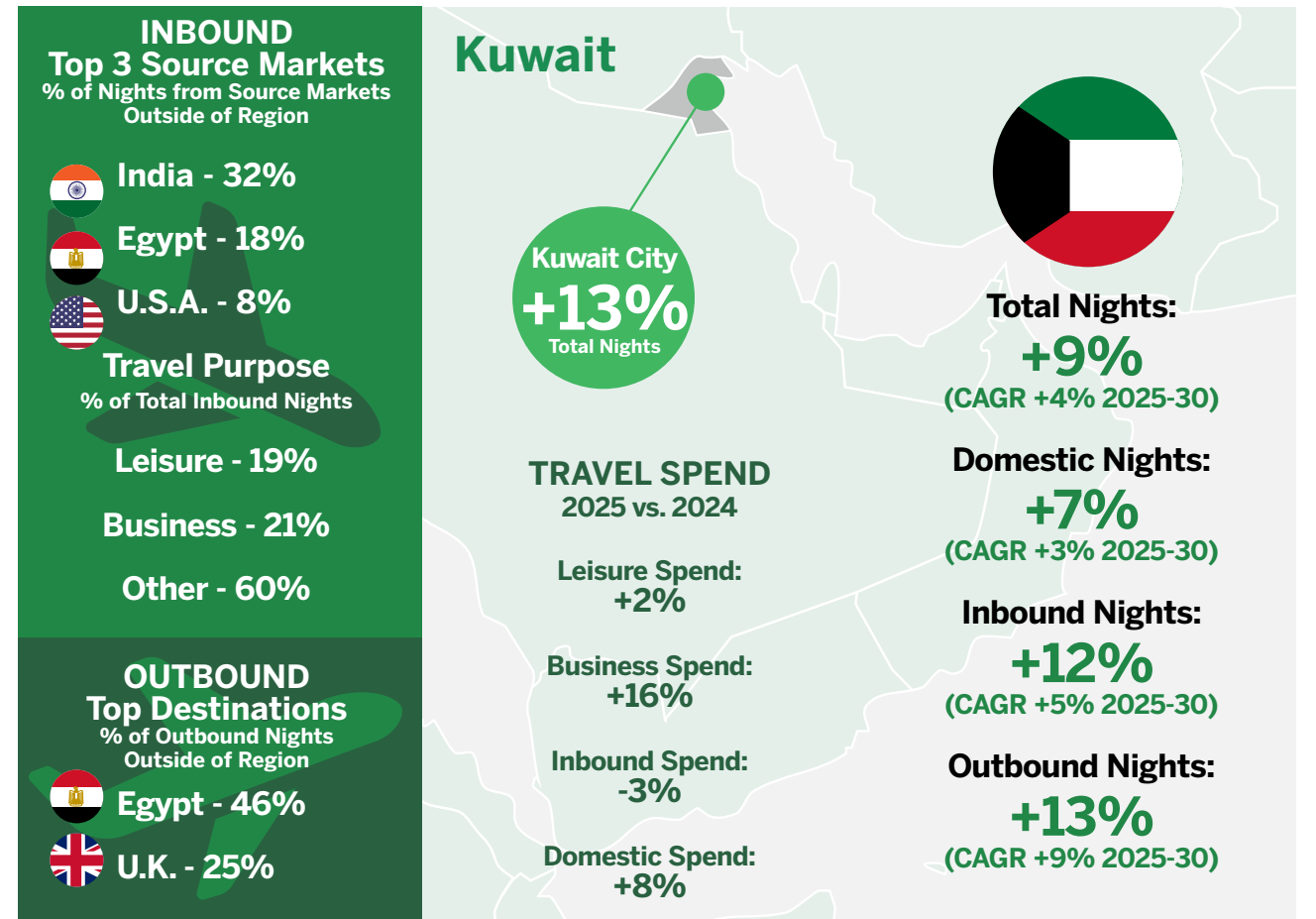
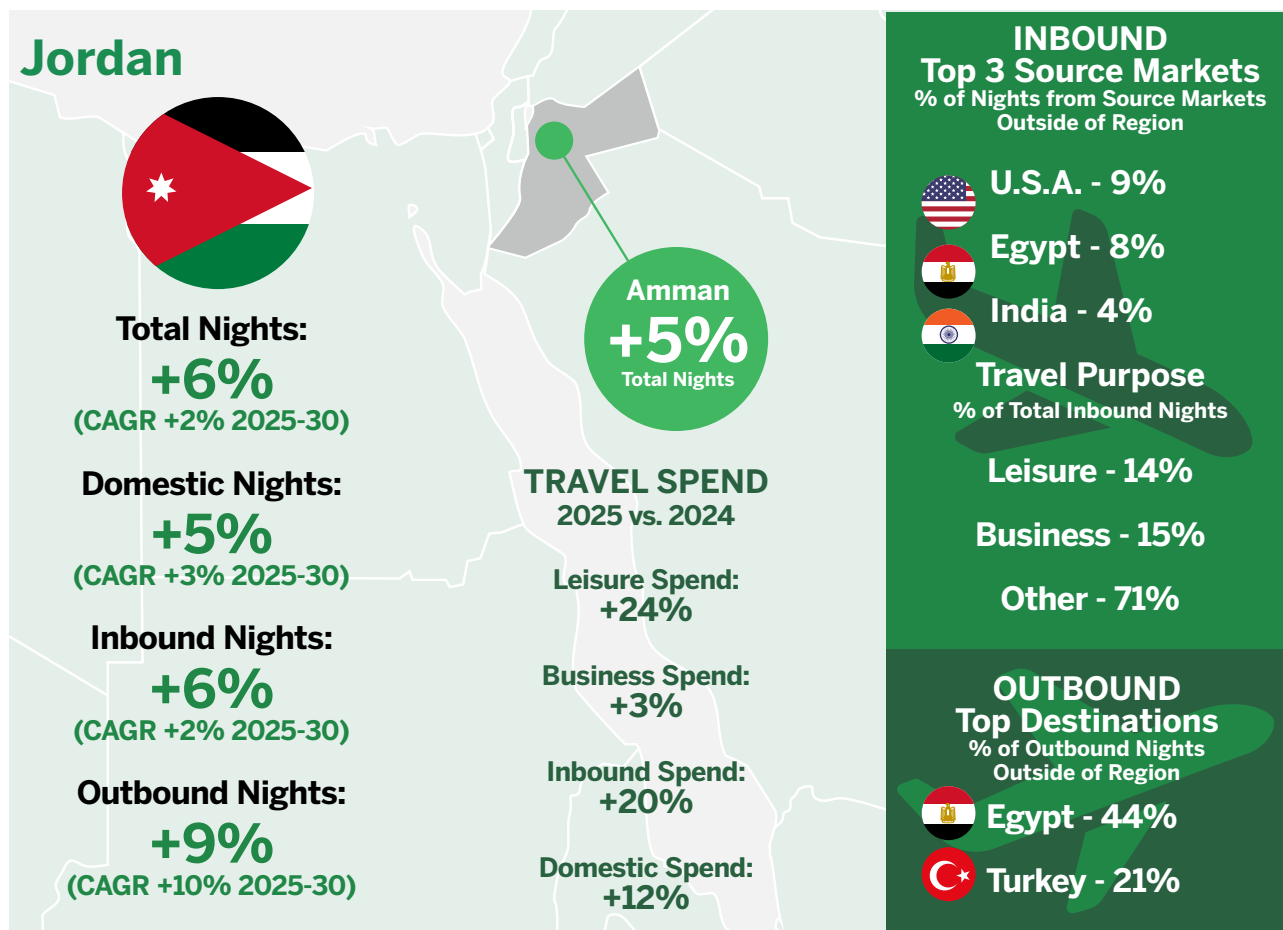
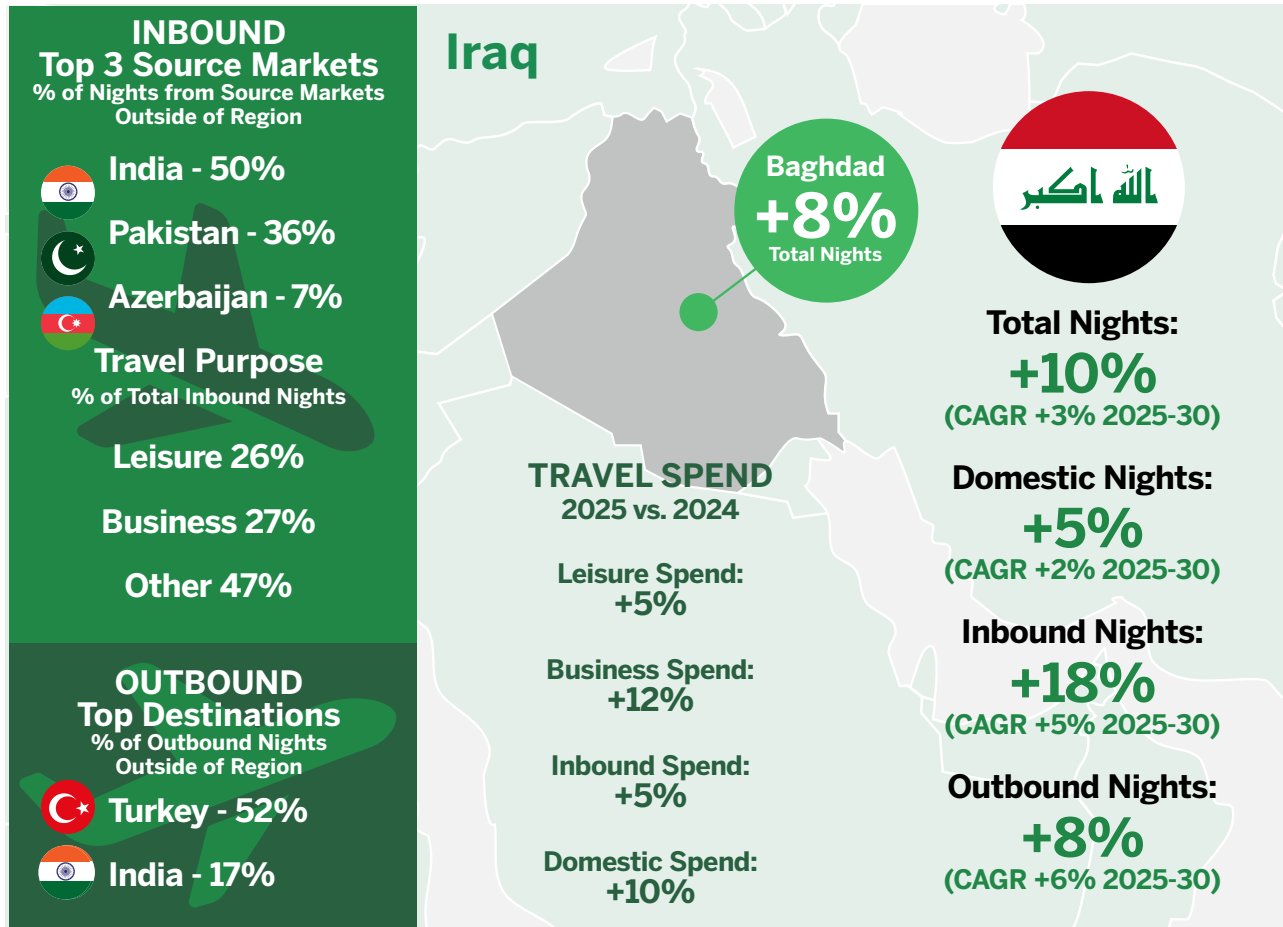
**Inbound Nights:**  
**+15%**  
(CAGR +6% 2025-30)

**Outbound Nights:**  
**+11%**  
(CAGR +6% 2025-30)

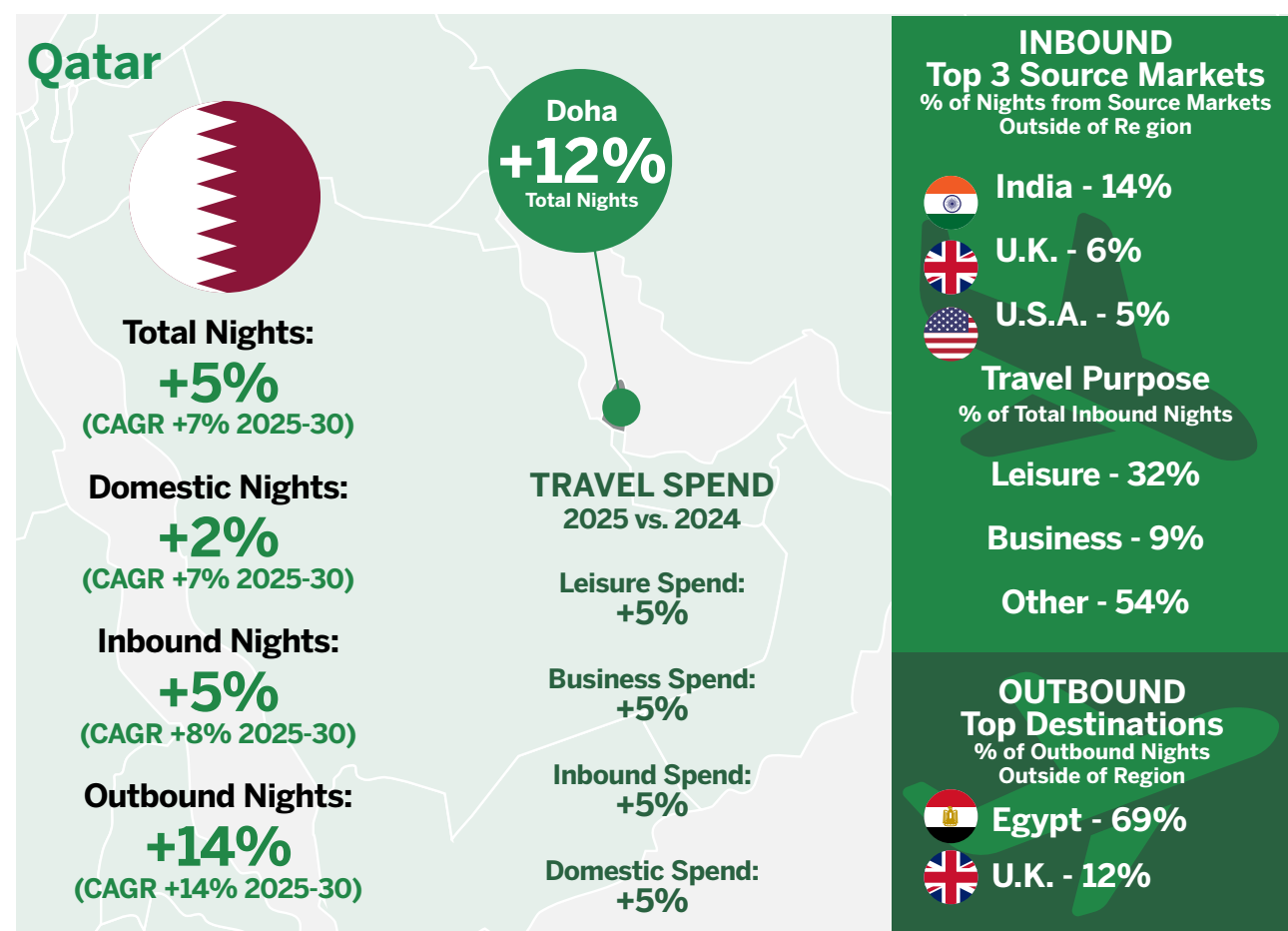
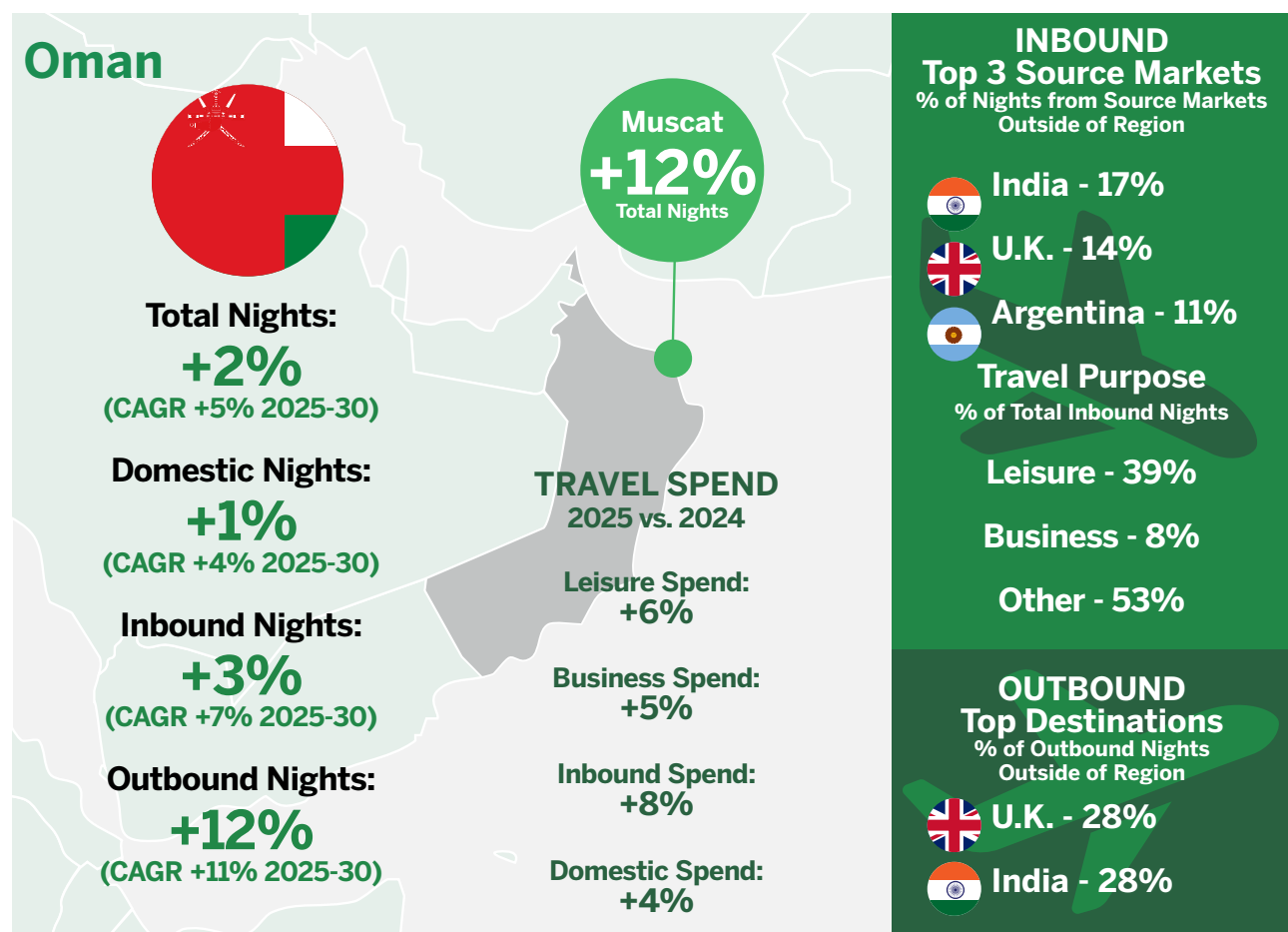
**TRAVEL SPEND**  
2025 vs. 2024

- Leisure Spend: +8%
- Business Spend: +24%
- Inbound Spend: +13%
- Domestic Spend: +6%

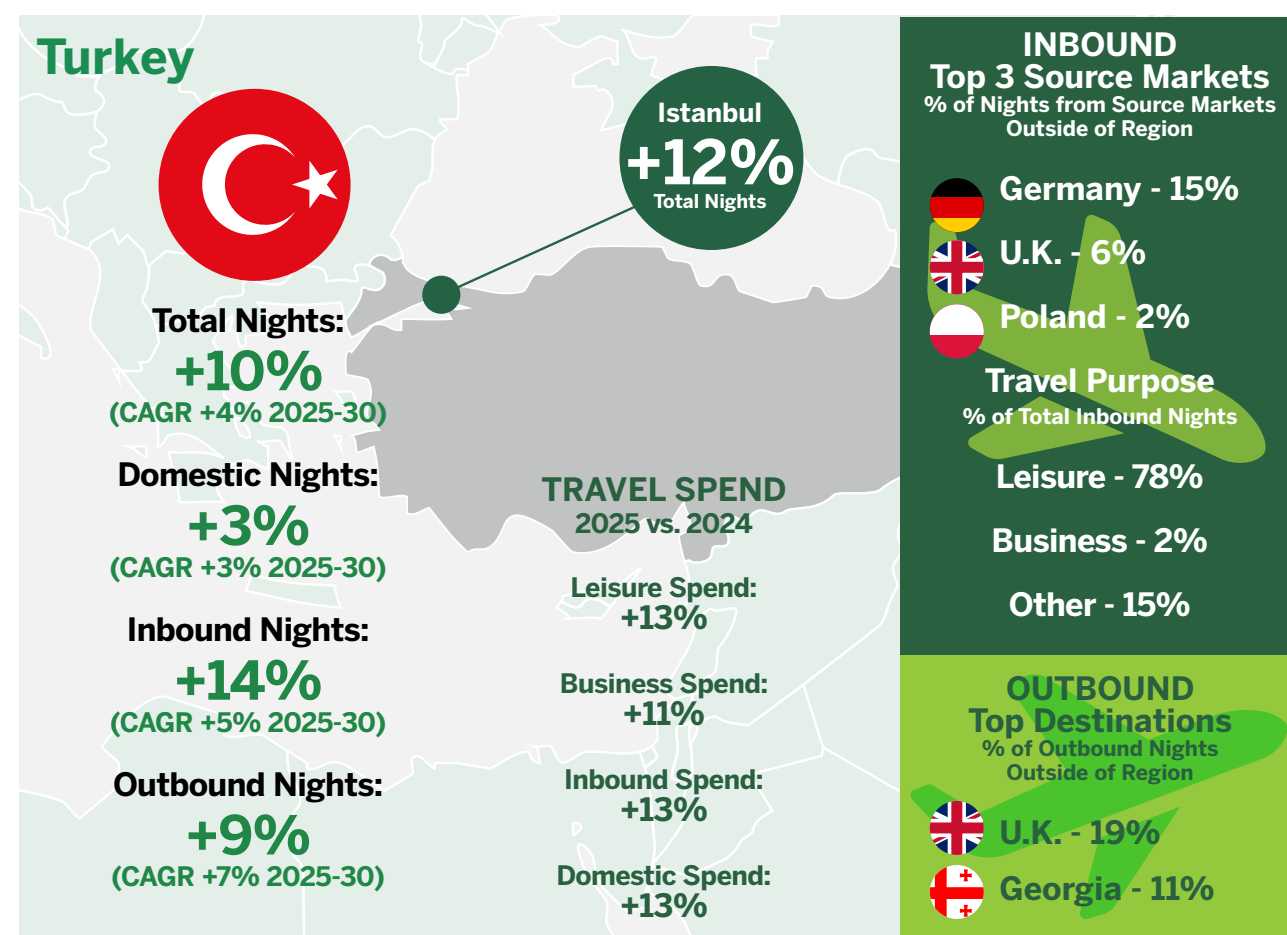
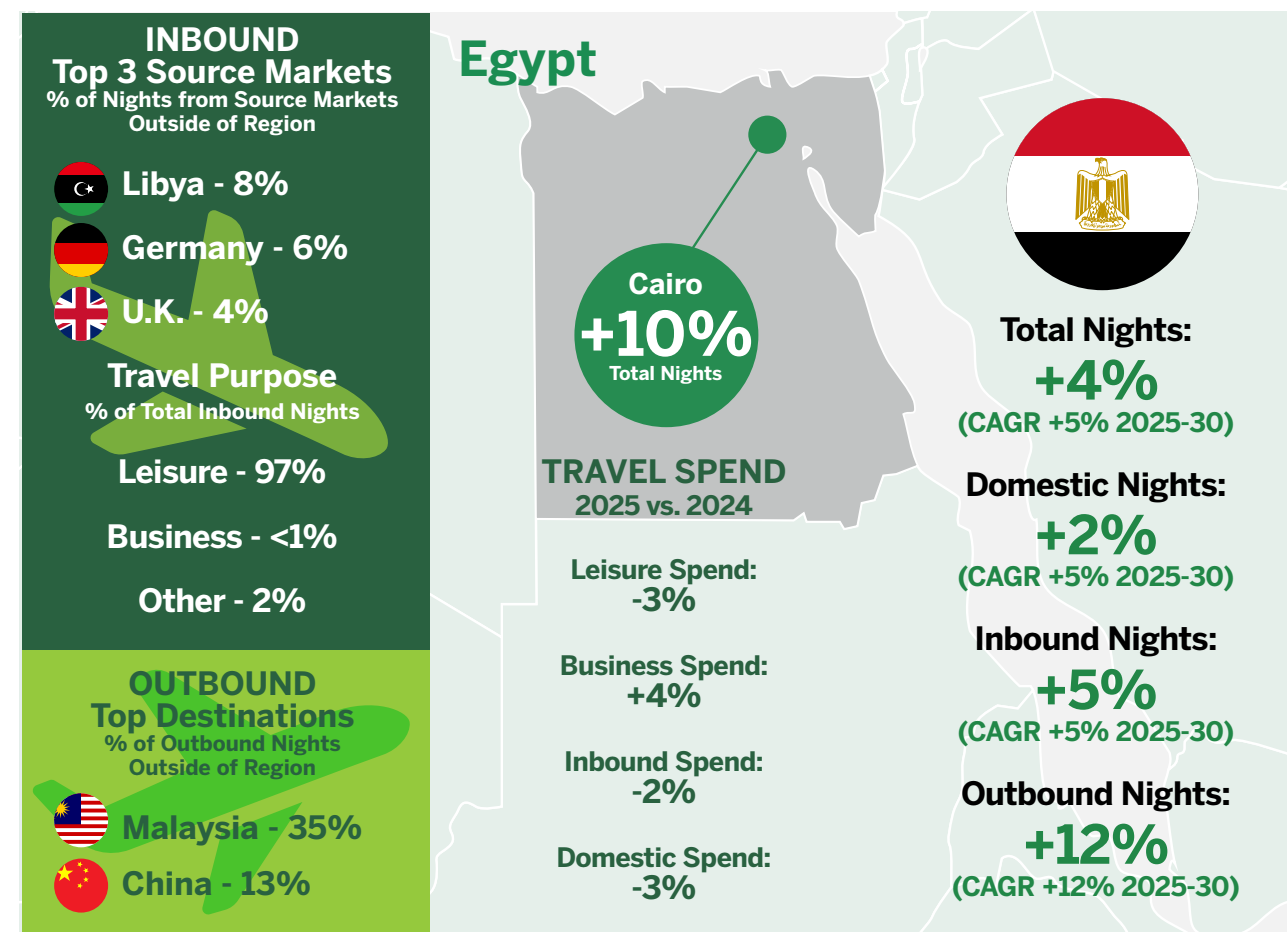










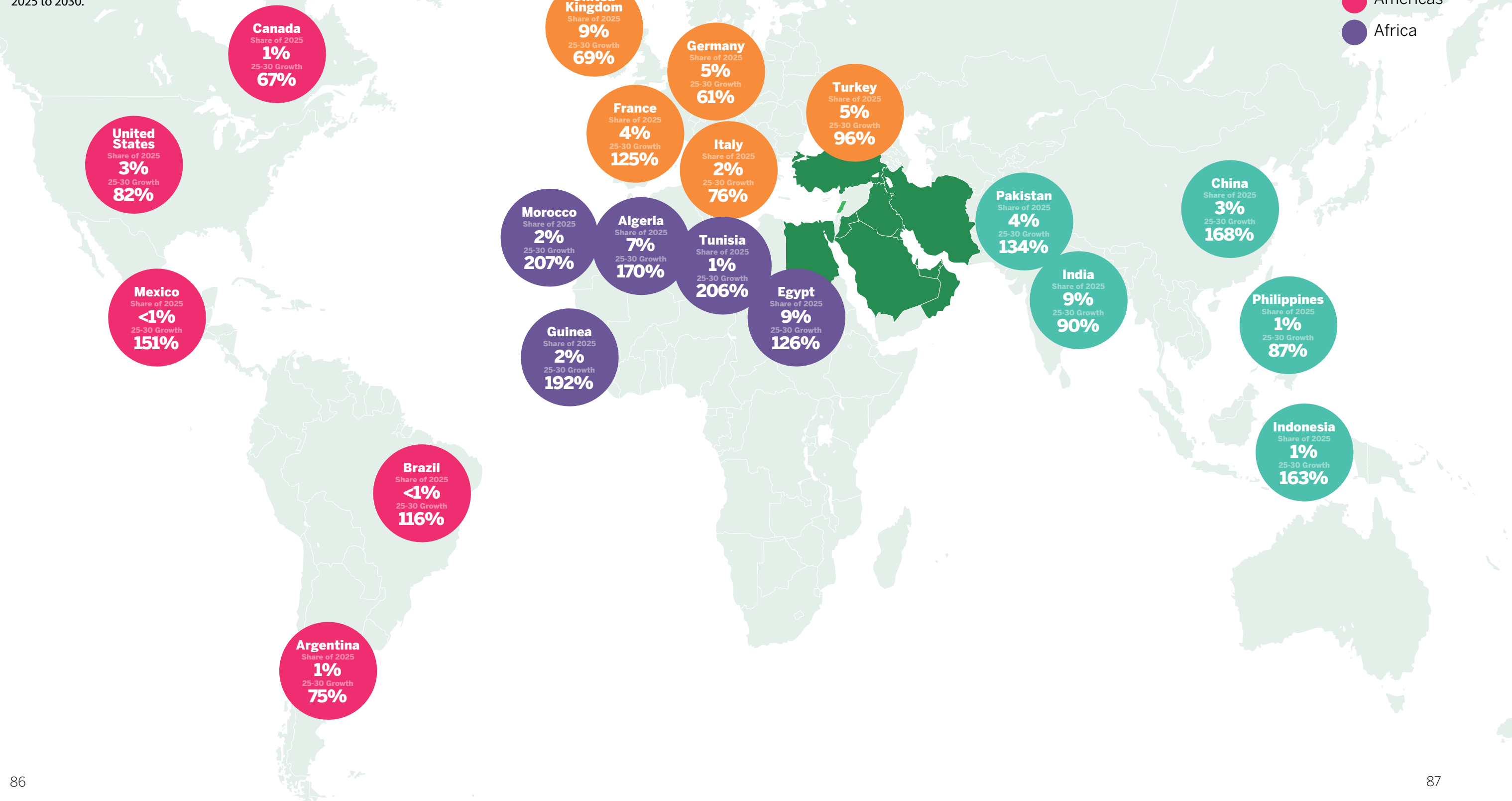




## Middle East Travel: Top 5 Leisure Inbound Markets and Growth

Map shows top five inbound countries from outside of the Middle East for each world region based on share of leisure nights in 2025 and total growth in leisure nights from 2025 to 2030.

- APAC
- Europe
- Americas
- Africa



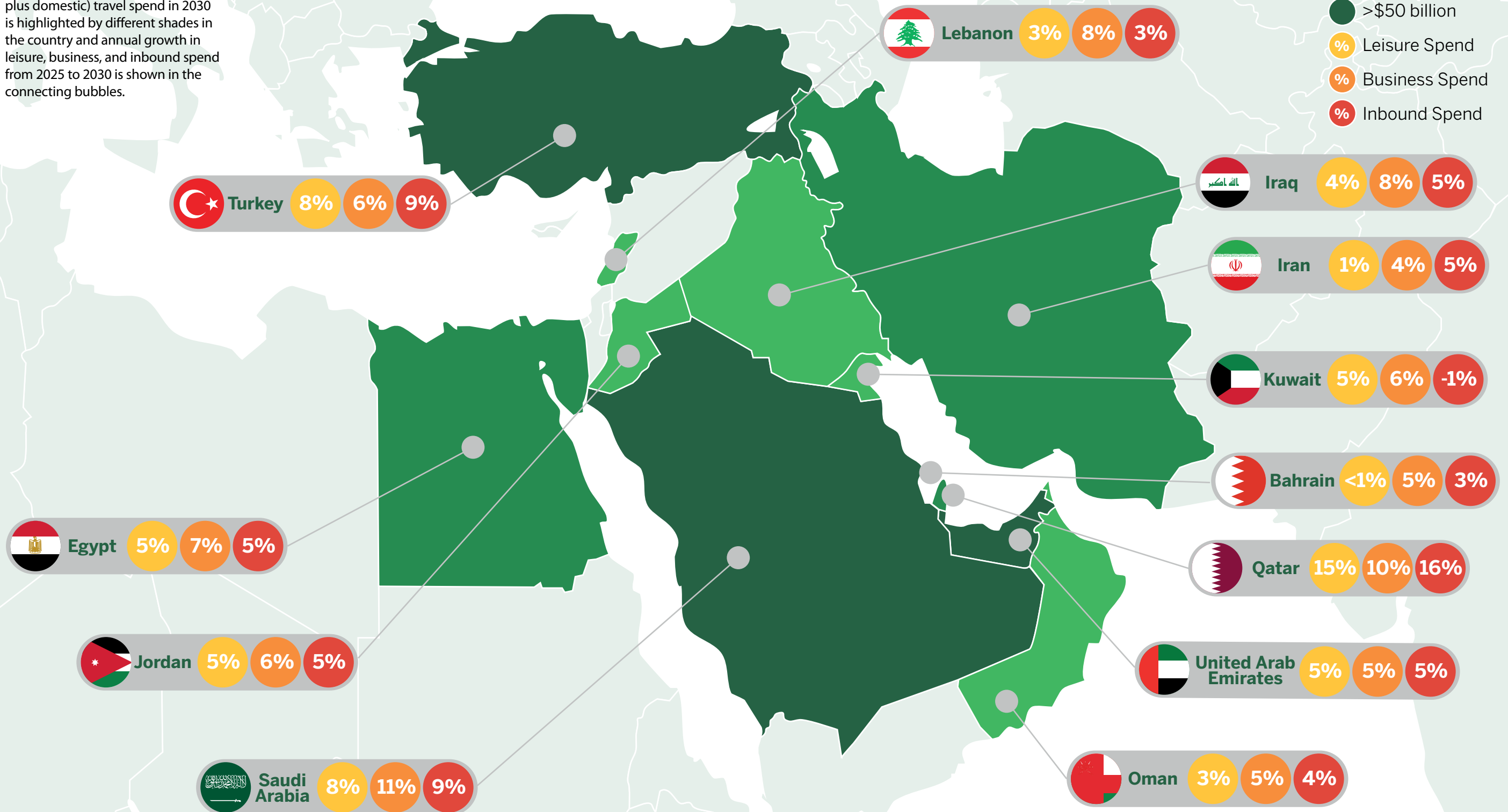


## Middle East Travel: Country Overview 2030

For each country, total (inbound plus domestic) travel spend in 2030 is highlighted by different shades in the country and annual growth in leisure, business, and inbound spend from 2025 to 2030 is shown in the connecting bubbles.

Total Travel Spend 2030

- <\$20 billion
- \$20 - \$50 billion
- >\$50 billion
- % Leisure Spend
- % Business Spend
- % Inbound Spend



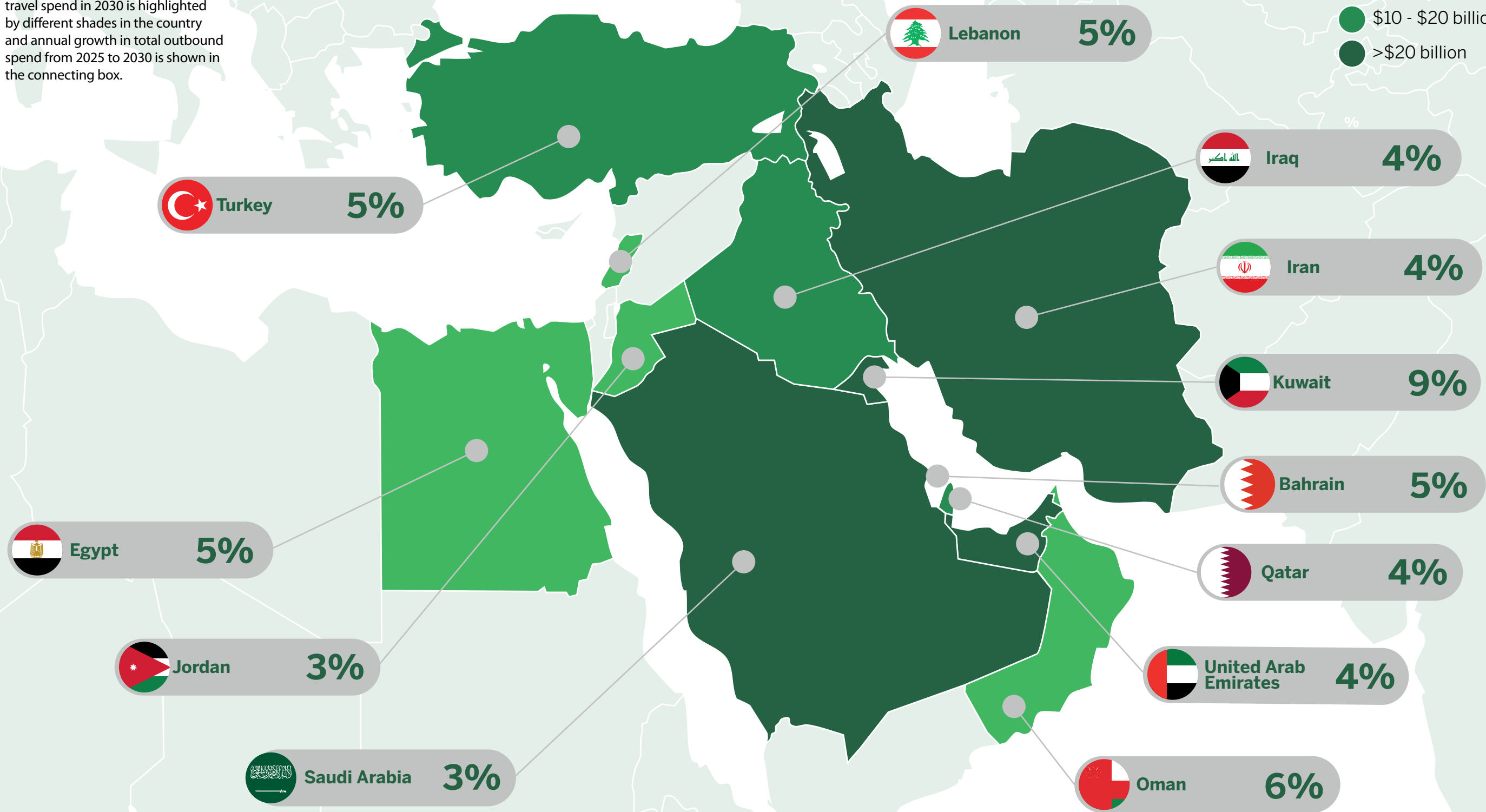


## Middle East Travel: Country Outbound Travel Spend 2030

For each country, total outbound travel spend in 2030 is highlighted by different shades in the country and annual growth in total outbound spend from 2025 to 2030 is shown in the connecting box.

Total Outbound  
Travel Spend 2030

- <\$10 billion
- \$10 - \$20 billion
- >\$20 billion



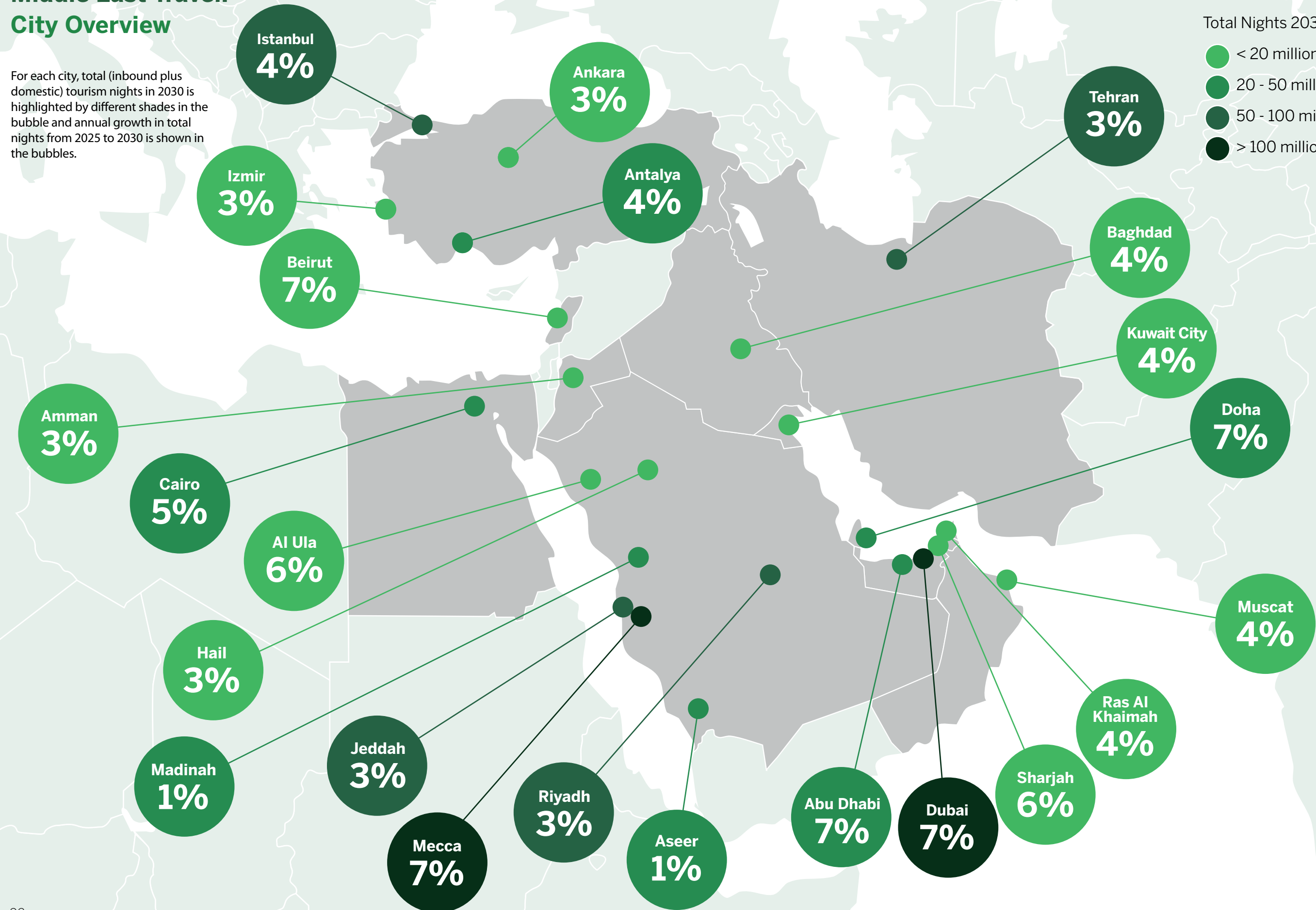


## Middle East Travel: City Overview

For each city, total (inbound plus domestic) tourism nights in 2030 is highlighted by different shades in the bubble and annual growth in total nights from 2025 to 2030 is shown in the bubbles.

Total Nights 2030

- < 20 million
- 20 - 50 million
- 50 - 100 million
- > 100 million





# 06. Report Definitions

This report uses the following terms and definitions when describing tourism activity which are set out and explained in more detail below.

## Middle East region

Group of countries according to geographical area encompassing the following 13 countries:

1. Bahrain
2. Kuwait
3. Iran
4. Iraq
5. Jordan
6. Lebanon
7. Oman
8. Qatar
9. Saudi Arabia
10. United Arab Emirates

Unless specified otherwise data in this report is based on the aggregation of these countries.

For additional context and relevance data for Turkey and Egypt is also included in the report. However, these countries are not defined within the Middle East region and, hence, are not included in aggregations of Middle East region travel activity.

## Gulf Cooperation Council countries

Group of countries in the Middle East containing the following 6 countries:

1. Bahrain
2. Kuwait
3. Oman
4. Qatar
5. Saudi Arabia
6. United Arab Emirates

## Key travel activity indicators

- Tourism arrivals/visits is the total number of visitors to a destination
- Tourism nights is the total number of nights in paid accommodation by visitors in a destination
- Travel/tourism expenditure includes all types of spend, including accommodation, eating and drinking, shopping, entertainment and transport-related costs, undertaken by visitors travelling within in a destination. This excludes the transport cost getting to/from the destination (e.g., international air fare)

## Types of travel:

### By destination

#### Domestic

- Overnight travel activity by residents within their own country

#### International/inbound

- International/inbound activity into a destination by visitors living in another country

#### Intraregional

- International/inbound activity by visitors living in the same world region as the destination country (e.g., travel by residents of United Arab Emirates to Saudi Arabia)

#### International/inbound from outside of region

- International/inbound activity by visitors living in a different world region as the destination country (e.g., travel by residents of the United Kingdom to Qatar)

#### Total domestic and international/inbound

- The sum of domestic and all international/inbound activity

#### Outbound

- International travel activity by visitors out of a source market to a different country. Includes intraregional travel as well as travel outside the region.

#### Intraregional outbound

- International travel activity by visitors out of a source market to a destination country in the same world region (e.g., travel by residents of Saudi Arabia to United Arab Emirates)

#### Outbound to outside of region

- International travel activity by visitors out of a source market to a destination country in a different world region (e.g., travel by residents of Qatar to the United Kingdom)

### By type

#### Leisure

- Leisure travel activity is travel for leisure purposes in a destination. For visits and nights this excludes activity for other purposes, including religious travel and visiting friends and relatives (VFR), but these categories are sometimes included in the leisure spend metrics

#### Business

- Business travel activity is travel for business purposes in a destination

#### Other

- Travel for non-leisure or business purposes activity is travel for other purposes in a destination. This includes travel for purposes, including religious travel and visiting friends and relatives (VFR), including at least one overnight in paid accommodation

#### Total

- Sum of leisure, business and other travel activity

### By destination and type

- Travel activity can be combined to discuss trends among domestic or international visitors in relation to leisure, business or other purpose of travel to a destination



# About Tourism Economics

**Oxford Economics is the world's foremost independent economic advisory firm.** Tourism Economics—an Oxford Economics company—combines decades of deep tourism knowledge with rigorous economics to answer the most important questions facing destinations and corporations worldwide.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become a leading global advisory firm, providing reports, forecasts, and analytical tools on more than 200 countries, 100 industries, and 7,000 cities and regions.

Headquartered in Oxford, England, with regional centres in New York, London, Frankfurt, and Singapore, Oxford Economics has offices across the globe in Belfast, Boston, Cape Town, Chicago, Dubai, Dublin, Hong Kong, Los Angeles, Melbourne, Mexico City, Milan, Paris, Philadelphia, Stockholm, Sydney, Tokyo, and Toronto. We employ over 650 staff, including more than 300 professional economists, industry experts, and business editors—one of the largest teams of macroeconomists and thought leadership specialists. Our global team is highly skilled in a full range of research techniques and thought leadership capabilities from econometric modelling, scenario framing, and economic impact analysis to market surveys, case studies, expert panels, and web analytics.

We serve 2,000+ clients worldwide—including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

## April 2025

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**Data/trends referencing any individual country currently on the United States' list of sanctioned countries is not included in the report.**

The modelling and results presented here are based on information provided by third parties, upon which Tourism Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

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# ATM Travel Trends Report 2025



As the Middle East's leading international travel and tourism event, Arabian Travel Market (ATM) continues to play a vital role in shaping the future of global travel. The ATM Travel Trends Report 2025, developed in collaboration with Tourism Economics, provides a forward-looking view of the trends and transformations redefining our sector in the region and worldwide.

What's clear from this year's findings is travel growth in the Middle East is incredibly strong. Travel spending is on track to exceed 2019 levels by an impressive 54% in 2025, with annual growth averaging more than 7% through 2030, ultimately reaching a projected \$350 billion. Bold national visions, game-changing developments, and enhanced connectivity are driving this momentum.

International travel to the region is expanding rapidly, with key source markets including Asia Pacific, Africa, and Europe. Easier visa regulations, growing airline fleets, and a rising appetite for leisure and business travel all contribute to this. A unified GCC visa could enhance this further, making cross-border travel more seamless and unlocking significant opportunities for regional collaboration.

The Middle East has also become a global hub for business events, and the resulting spend within this vertical is expected to grow 1.5 times faster than the global average until 2030. ATM is proud to support this growth. Our 2025 event brought together over 55,000 professionals from 166 countries while introducing the inaugural IBTM@ATM, opening the door to new possibilities in business events.

We're also witnessing incredible momentum in luxury and lifestyle travel, with more high-net-worth visitors attracted to the region's exceptional hospitality, curated experiences, and premium cultural calendar. Whether it's world-class music events, F1 races, or the upcoming FIFA World Cup in 2034, the region is redefining what travel can look like for a new generation of tech-savvy, purpose-driven explorers.

As we look ahead, it's clear that sustainability, innovation, and evolving traveller expectations will continue to reshape our industry. ATM remains committed to leading this evolution by bringing together destinations, forging new partnerships, and helping to build a more connected, inclusive, and resilient future for travel across the GCC and beyond.

**Danielle Curtis**  
**Exhibition Director ME**  
**Arabian Travel Market (ATM)**





