ATM Travel Trends Report 2026

In association with
Tourism Economics

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1. Foreword

Introducing the ATM Travel Trends Report 2026

As the leading international travel and tourism event in the Middle East, Arabian Travel Market (ATM) brings together the global travel community in Dubai, connecting markets, ideas and opportunities across every vertical of the travel and tourism sector. At a time of continued transformation, our role in facilitating meaningful dialogue and providing research-led insight is more important than ever.

The Arabian Travel Market Travel Trends Report 2026 examines how changing traveller expectations, innovation and technology are shaping the next chapter of regional and global tourism, while highlighting the resilience and continued evolution of the global travel industry.

Through these insights, we aim to provide industry leaders with the intelligence to navigate change, identify emerging opportunities and make informed decisions as we collectively shape the future of travel.

Danielle Curtis
Regional Portfolio Director – UAE
RX Global

Introducing Tourism Economics

Travel always recovers. This remains as true today as it has throughout the two decades Tourism Economics has measured the industry. Travel continues to be prioritised in consumer spending and destinations offering valuable experiences will continue to succeed. This report examines the forces shaping tourism across the Middle East, North Africa and South Asia (MENASA) and the wider global market, combining the latest data and industry intelligence. It highlights the region's evolving visitor economy, industry developments and growth opportunities. These insights enable decision-makers to anticipate change, unlock potential and support sustainable growth.

Tourism Economics, an Oxford Economics company, transforms global economic intelligence into actionable insights for the travel industry. Drawing on decades of specialist experience, rigorous analytical tools and world-class datasets, we help organisations understand changing market dynamics and make confident decisions. We are delighted to continue our partnership with Arabian Travel Market and share insights into the opportunities shaping travel across the Middle East and wider MENASA region. Underpinned by resilient demand, the region continues to demonstrate ambition and innovation through sustained investment and a commitment to high-quality experiences. Its enduring appeal to travellers provides a strong platform for continued growth.

Dave Goodger
Managing Director EMEA
Tourism Economics

2. Executive Summary

GLOBAL TRAVEL SETTING NEW RECORDS

Travel closed 2025 at an all-time high. Worldwide total visitor nights, including both domestic and international travel, reached 24 billion, 16% more than in 2019, while international arrivals passed 1.5 billion for the first time. Total in-destination spending climbed 26% to $7.2 trillion, and WTTC put tourism's contribution to global GDP at $11.6 trillion and the jobs sustained at 366 million, roughly one in nine worldwide.

The MENASA (Middle East, North Africa, South Asia) region led the field. In 2025, total travel volumes across the region finished almost 50% above 2019 levels, three times the growth recorded globally, and the region generated more than half of the worldwide increase in international travel over that period.

Inbound visitor nights in MENASA grew 61% between 2019 and 2025, compared with 12% globally.

Source: Tourism Economics 2026

CONFLICT SLOWING A STRONG TRAJECTORY

Momentum has slowed in 2026. The conflict involving the US, Israel and Iran and the disruption that followed are weighing on demand through three channels: costlier oil fuelling inflation and squeezing household finances; reduced capacity to, from, and through the Middle East, which carried around 15% of global transit traffic pre-conflict; and weakened sentiment among travellers, including due to concerns over connectivity and safety.

International travel to MENASA is expected to fall 14% in 2026. This will be driven by the Middle East falling by more than a fifth and over 30% in the Gulf Cooperation Council (GCC) countries, though partly buffered by modest gains in North Africa and South Asia. Elsewhere, global travel growth is expected to slow rather than stop during 2026. Long-haul trips are set to dip slightly, while short- and medium-haul visits will rise 6% as travellers shift towards destinations closer to home. This will lead to a 4% increase in global arrivals and a new record-breaking year for travel volumes in 2026.

International travel growth will slow globally in 2026, due to the conflict in the Middle East, but still reach new record volumes.

Source: Tourism Economics 2026

GCC ANCHORING INBOUND DEMAND

In 2025, the GCC recorded 730 million international tourism nights from 79 million visitors who spent $105 billion. This share accounts for nearly half of all inbound nights across MENASA, which is set to rise a further five percentage points by 2030. Over the next five years, inbound nights to the GCC are forecast to grow more than 10% annually, against 6% globally, lifting volumes over 60% above 2025 levels. Overall, the Middle East is on course to welcome 66 million more inbound visitors by 2030, a rise of 39% worth an additional $116 billion in visitor spending.

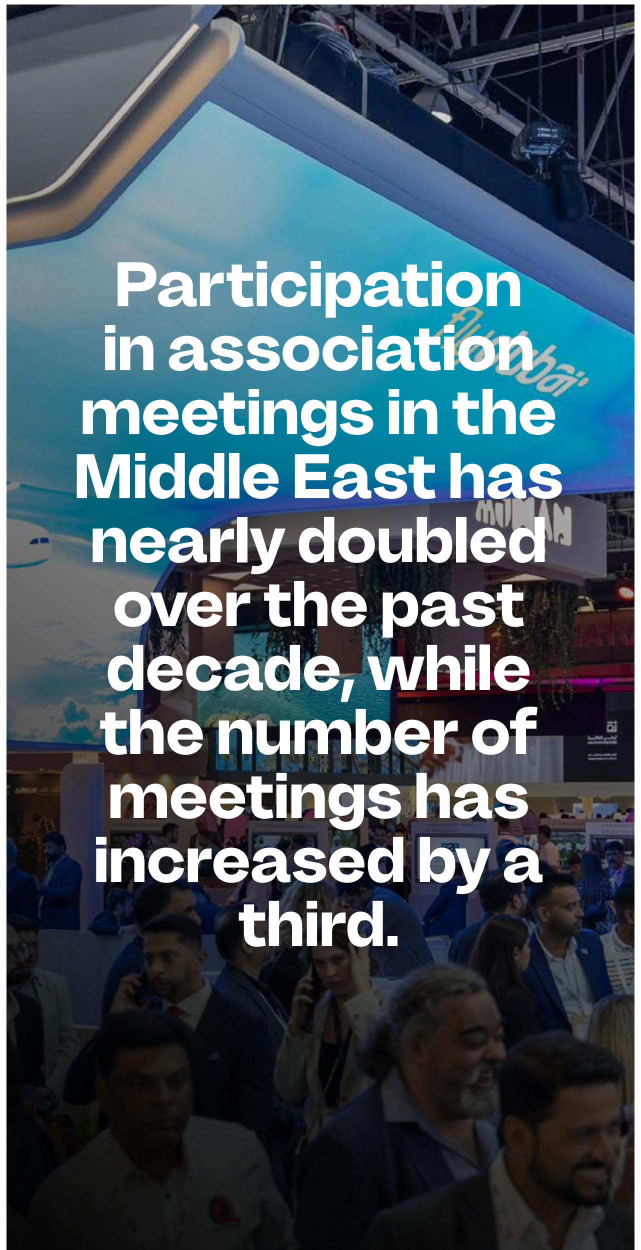
Saudi Arabia and the United Arab Emirates (UAE) are set for especially strong growth, alongside ongoing investment in capacity, events and tourism infrastructure. Leisure visits are set to almost double in Saudi and increase nearly 50% in the United Arab Emirates between 2025 and 2030. Outside the GCC, India is set to see an uplift of 50% and Morocco 20%, while Türkiye and Egypt remain the largest leisure destinations in MENASA.

The GCC will drive inbound growth in MENASA with visitor nights set to increase 10% per year over the next five years.

Source: Tourism Economics 2026

BUSINESS TRAVEL AND EVENTS PULLING AHEAD

Business visits made up 22% of GCC arrivals in 2025, close to double the global average. Long-haul travel will drive growth in coming years: inter-regional business arrivals to the GCC are set to rise 50% by 2030, with Saudi Arabia's expected growth at over 150%. Business events amplify this effect: ICCA data show that meetings held in the Middle East draw more delegates than any other region, averaging 532 delegates against 403 globally, while the Middle East was the only global region to achieve growth in net exhibition space rented between 2019 and 2024/25.



Source: ICCA 2026

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LONGER-HAUL MARKETS DRIVING THE NEXT PHASE

Visits to the Middle East from beyond the region are projected to grow 43% between 2025 and 2030, compared with growth of 30% from intra-regional arrivals. Germany and the UK remain the largest leisure source markets, while France and India are expected to expand fastest among the major source countries. Leisure nights from China are forecast to rise 160% and gain the largest share of Middle East inbound leisure travel of any market. There will also be strong growth in leisure travel from several other Asian markets, including Thailand, Indonesia and Singapore.

The Middle East captured 14% of Indian outbound leisure nights in 2025, with this share projected to reach nearly 20% by 2030.

Source: Tourism Economics 2026

Source: Tourism Economics 2026

PREMIUM APPETITE AND PRICE SENSITIVITY WIDENING

The Middle East attracts a particularly high-spending audience. More than three quarters of prospective visitors to the Middle East prioritise luxury when booking, compared with half of those interested in alternative destinations.

However, prioritisation of value is simultaneously reshaping traveller choices across MENASA, as three in five prospective South Asia visitors report greater interest in affordable destinations than two years ago. Secondary cities including Sharjah and Hurghada are also gaining traction with younger travellers seeking alternative, cheaper destinations.

Half of travellers report growing interest in discounts compared with two years ago, while 35% are more interested in premium experiences, highlighting growing demand for both value and quality.

Source: Tourism Economics 2025

AI ADOPTION MOVING FROM PILOT TO PRACTICE

MENASA is the global frontier for AI-led travel discovery. PwC found that 91% of travel businesses in the Middle East are already piloting or running AI in their operations, with 85% reporting measurable cost savings. Prospective visitors to the region are more than twice as likely as those interested in other destinations to have planned a trip using an AI chatbot. Biometric boarding in Doha, conversational servicing in India and agentic commerce pilots across distribution all highlight a market investing in AI-native infrastructure from the outset.

Prospective visitors to the Middle East are more than twice as likely to have used an AI chatbot to plan a trip (28%) than those interested in visiting other regions (12%).

Source: Tourism Economics 2025

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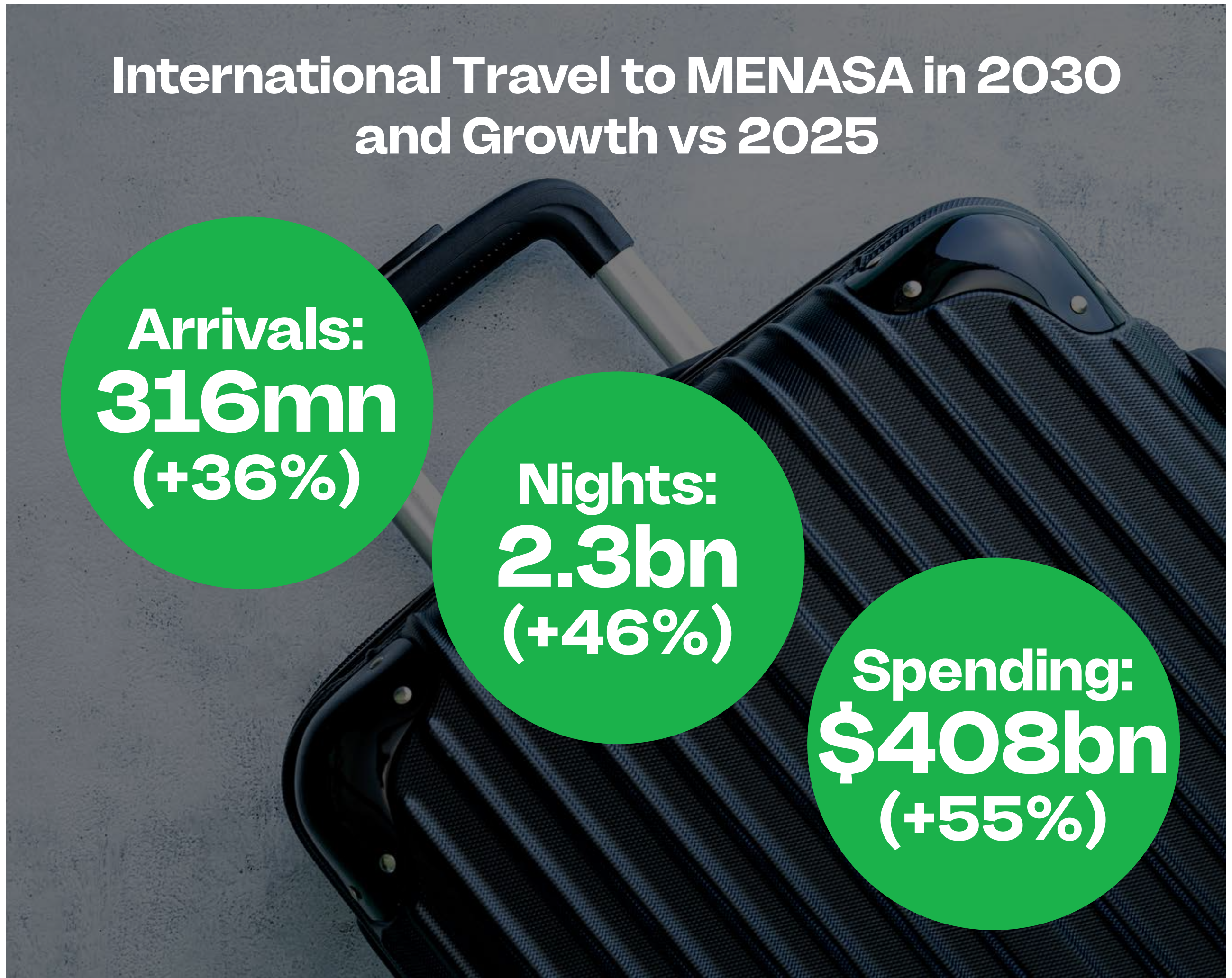
RESILIENCE SHORTENING THE RECOVERY CYCLE

Tourism demand remains resilient, even in the face of continued disruption. Tourism Economics' analysis of travel activity since the early 2000s finds that demand has consistently returned to pre-crisis levels after every major disruption, with the fastest rebounds occurring where destinations and operators implement proactive measures and respond early.

This resilience is expected to continue and support near-term growth: in 2027, international travel is expected to rise 8% worldwide and 17% across MENASA as arrivals to and from Middle Eastern countries recover. Uncertainty remains elevated and there are downside risks to the near-term outlook, but resilience remains a key foundation of the industry and provides a counter to these challenges.

The tourism industry's average recovery period from major crises has compressed from around 24 months in the early 2000s to 10-12 months in recent years.

Source: Tourism Economics 2026



Source: Tourism Economics 2026

A DECADE OF STRUCTURAL GROWTH

Worldwide visitor nights are expected to exceed 29 billion by 2030, with in-destination spending to reach $10 trillion. This will represent increases of 41% and 76% for nights and spending, respectively, from 2019. MENASA will see even stronger growth over this decade, with total nights to grow 86% and spending to more than double.

MENASA is also forecast to outpace the global aggregate for international travel, lifting its worldwide share of these nights from 15% in 2019 and 21% in 2025, to 23% by the end of the decade. The Middle East's share is projected to see similar gains over the period, growing to 19% by 2030 (from 12% in 2019 and 18% in 2025), driven largely by the UAE and Saudi Arabia. International business nights across MENASA are expected to grow more than 60% between 2025 and 2030, an almost tripling of volumes from 2019, and comfortably ahead of the global pace.

Over the coming decade, global tourism is projected to grow 3.4% a year, one percentage point ahead of the global economy at 2.5%.

Source: Tourism Economics 2026

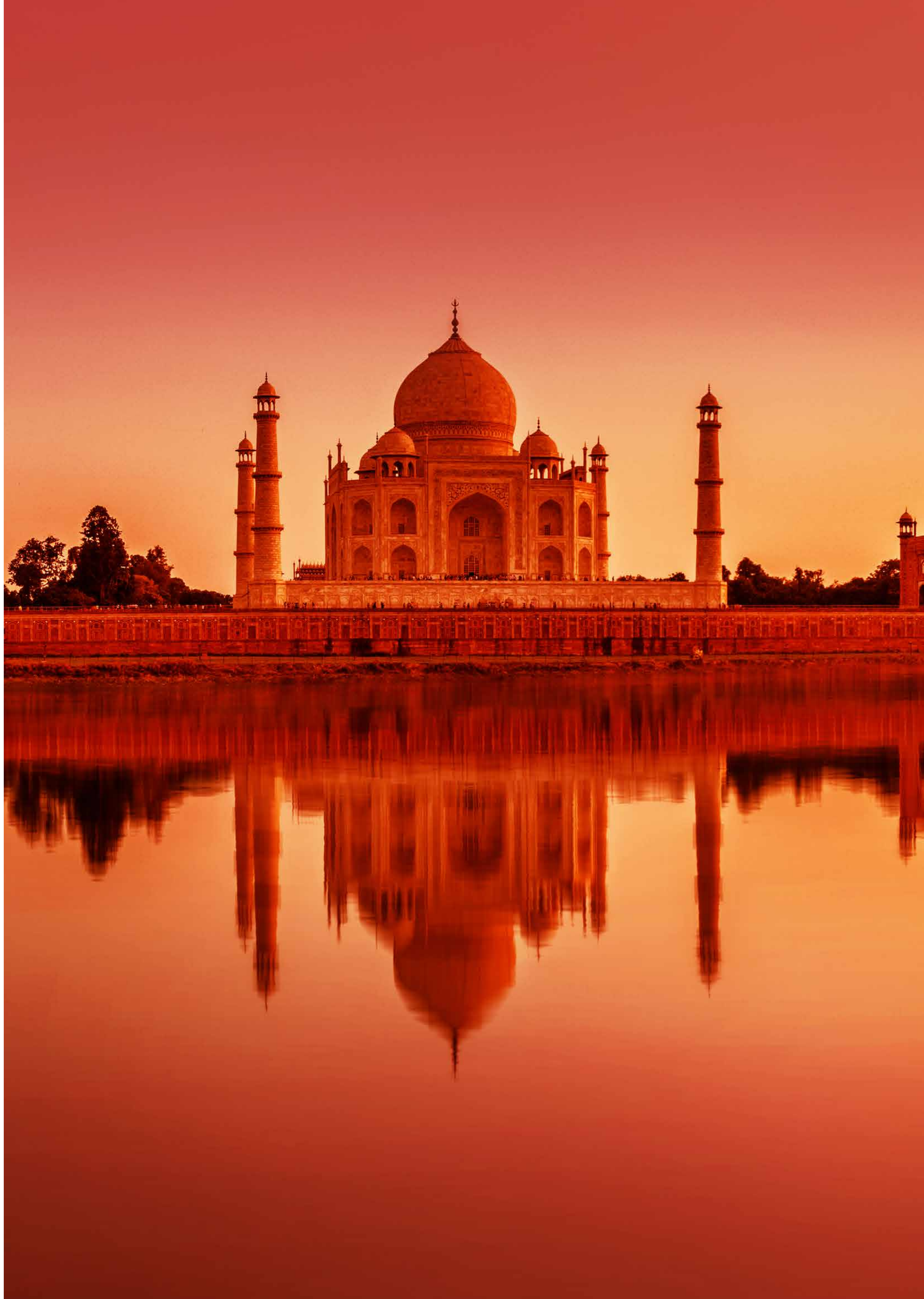
OUTBOUND DEMAND GAINING GLOBAL WEIGHT

MENASA is an increasingly influential source of global travellers. Residents in the region took 131 million outbound trips in 2025, staying 1,041 million nights and spending $169 billion in global destinations. Outbound MENASA visits outpaced the global average in recent years and are set to rise almost a third by 2030, on par with worldwide growth. Leisure visits make up more than half of outbound visits from MENASA. India, the region's largest outbound leisure market, is forecast to grow 44% over the next five years. The UAE, Bangladesh and Morocco are other large markets that will see solid increases.

Outbound leisure travellers from the Middle East primarily go to destinations elsewhere within the region, most notably Türkiye and Egypt, while European countries such as France and Greece are the most popular longer-haul locations. Growth in coming years will be stronger for travel to longer-haul destinations, as connectivity improves and consumers seek new experiences. Indonesia, Singapore, the Philippines and Australia are all set to see exceptionally strong growth from Middle Eastern leisure visitors.

Outbound nights per capita are four times higher for GCC residents than the global average.

Source: Tourism Economics 2026



3. Global & MENASA Overview

TRAVEL TRENDS

Global travel and tourism: a record-setting market

Global travel is in a strong position, with volumes reaching new records as consumers continue to prioritise travel in their spending. Total tourism activity reached almost 24 billion visitor nights in 2025, an increase of 16% from 2019, while in-destination spending increased 26% to US$7.2 trillion. According to the World Travel & Tourism Council (WTTC), this resulted in a contribution to GDP of US$11.6 trillion dollars, close to one-tenth of the global economy, while the sector supported 366 million jobs, equating to around one-in-nine globally.

International travel grew particularly strongly as overnight arrivals increased 6% from 2024 to more than 1.5 billion, reaching a new peak 5% higher than 2019 volumes. Meanwhile, visitor nights increased 4% to exceed pre-pandemic levels by 12%. Domestic travel increased more modestly, but still hit new historic highs, and remains the much larger segment. While slower growth is anticipated in 2026, in aggregate and for international travel, new records are nevertheless expected to be reached before the end of the year.

In 2025, global travel reached record highs of 24 billion visitors nights and $7.2 trillion of in-destination spend.

The sector contributed $11.6 trillion to global GDP, supporting 366 million jobs.

Source: WTTC & Tourism Economics 2026

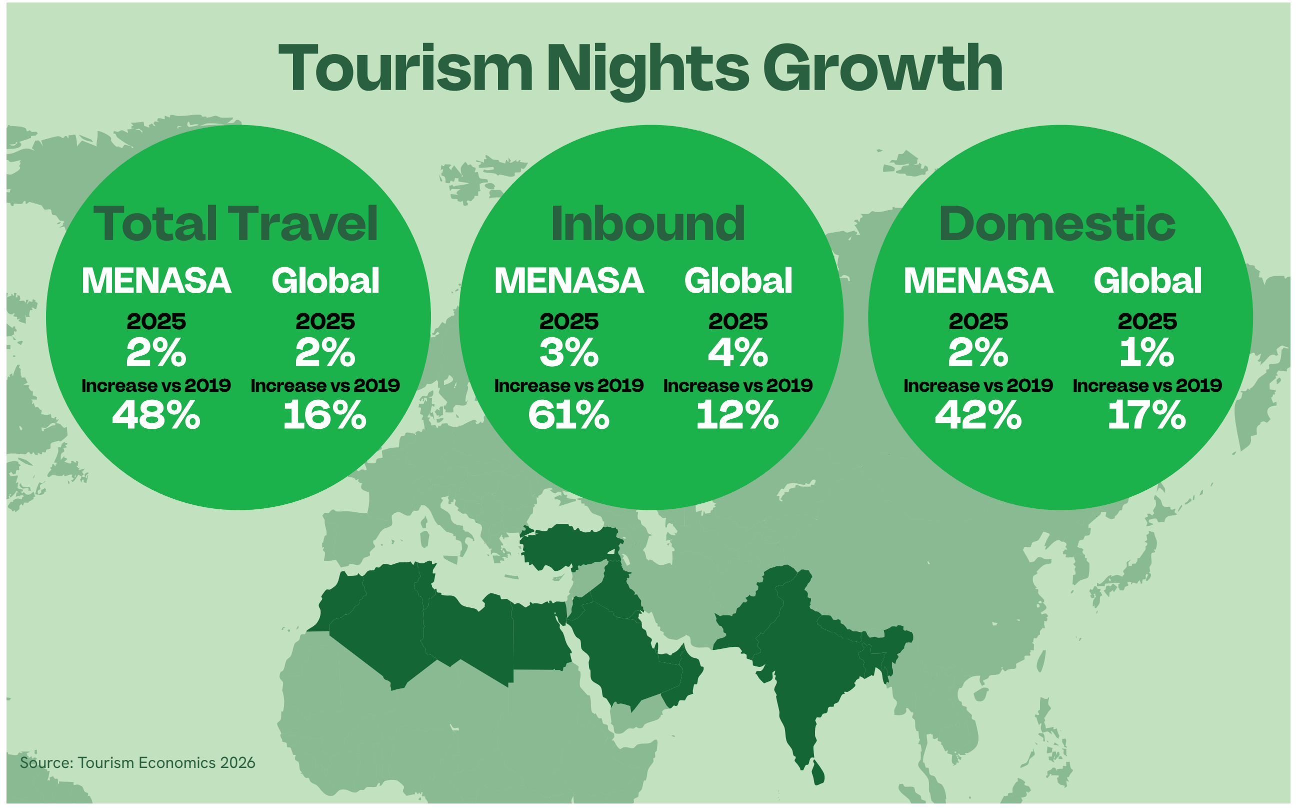
MENASA as a region, encompassing the Middle East, including Gulf Cooperation Council (GCC) countries, North Africa and South Asia, has outperformed other world regions and been a key driver of recent global tourism growth. GCC destinations and their significant investments in tourism infrastructure, strategies and major events have been particularly important.

International Tourism Activity

	Overnight Arrivals		Visitor Nights		In-Destination Spend	
	MENASA	Global	MENASA	Global	MENASA	Global
2025 Volume	0.23bn	1.54bn	1.55bn	7.36bn	$0.26bn	$1.70tn
Increase vs 2019	+22%	+5%	+61%	+12%	+35%	+20%

Source: Tourism Economics 2026

By 2025, total tourism volumes in MENASA, including domestic activity, were almost 50% above 2019 levels, three times the growth recorded globally. The strongest increase was for international travel, with the uplift in MENASA accounting for over half of the global increase over this period. MENASA's outperformance of the global average slowed in 2025 but is expected to resume in coming years, supported by leisure activity.



Source: Tourism Economics 2026

Near-term impacted by geopolitical and economic disruption

Growth in global travel has slowed this year, as geopolitical and economic disruption has impacted consumer demand and travel patterns. This slowdown has been driven by the US-Israel War on Iran and associated disruption throughout the Middle East. While some degree of normality has resumed relative to earlier in the year, uncertainty remains elevated and travel demand will continue to be impacted until there is a lasting resolution to the conflict.

The Middle East has been hit the hardest by the disruption, with international travel in the region set to fall 20% or more this year, including a decline of over 30% for the GCC. This will drive a decline in arrivals of 14% for MENASA overall, as falls in the Middle East more than offset moderate growth for arrivals to South Asia and North Africa.

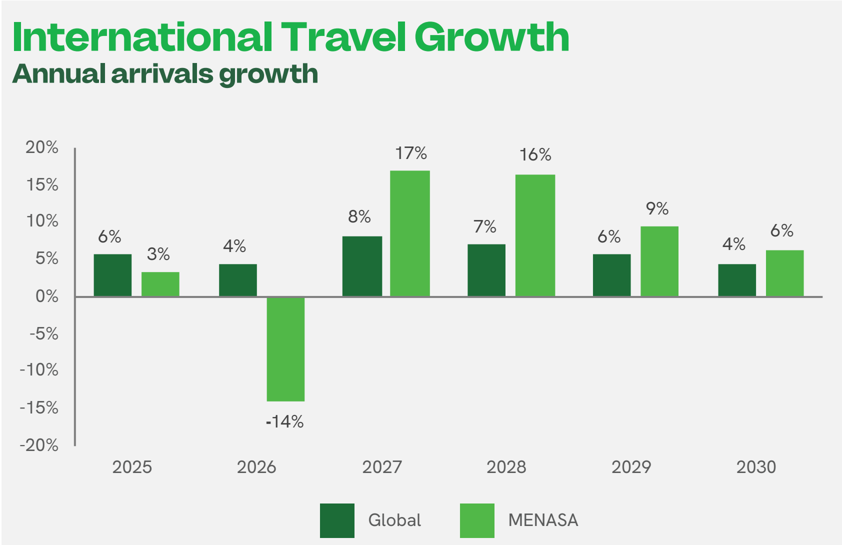
While any slowing of travel growth is concerning for the industry, recovery from periods of disruption is becoming quicker over time, as stakeholders learn to adapt and respond effectively to various challenges. Research by Tourism Economics reveals that average recovery periods from tourism crises have fallen significantly in the past two decades, fundamentally changing the economics of travel disruption and pointing to the industry becoming more resilient.

In an increasingly globalised world, this resilience is important as it is common for country or regional crises to flow on to broader geographies. The current disruption is causing global impacts, which is leading to a slower pace of growth than in recent years. Nevertheless, overnight arrivals are set to increase 4% worldwide in 2026.

There are three key channels through which the conflict in the Middle East is dampening global travel demand:

1. **Economic:** Higher oil prices are raising inflation, delaying interest rate cuts and weakening GDP growth and household finances. Together, these pressures are making travel more expensive and dampening demand.
2. **Air travel:** Reduced capacity to, from and through the Middle East is constraining global air travel, reflecting the region's central role as an international connectivity hub.
3. **Sentiment:** Uncertainty surrounding household finances and living costs, air connectivity and safety has made global travellers more cautious about international travel.

Global inter-regional travel, also referred to as long-haul travel, is most affected, with these trips set to fall slightly in 2026, while short-haul travel will remain robust. This is because long-haul trips are the most expensive form of travel, leading to the largest dollar increases in airfares and other costs, and travellers are typically more averse to longer trips when sentiment weakens and safety concerns are heightened. This has been exacerbated by disruption to activity at major Middle East hub airports, with the region hosting around 15% of global transit activity before this year's conflict commenced.



Source: Tourism Economics 2026

Global growth in international travel will slow in 2026, but resilient demand will push volumes to new record highs.

Source: Tourism Economics 2026

Nevertheless, consumers remain eager to travel and are changing how and where they travel rather than stopping altogether. Global intra-regional (short- and medium-haul) visits will increase 6%, with part of this growth reflecting substitution from long-haul travel to trips of shorter distances and/or closer to home.

Increased regionalisation of travel is supporting a relatively robust outlook for international travel in Asia-Pacific (9% annual increase in arrivals) and Europe (7%). Sub-Saharan Africa will also see strong growth, with an increase of 12% expected for arrivals, though a more modest increase (4%) is projected for the Americas.

While inter-regional travel is the key drag on global growth, the dynamic is different for MENASA, where intra-regional travel is seeing the largest declines. Arrivals to MENASA destinations from elsewhere in the region are set to fall 27%, driven by reduced travel to and from the Middle East. This includes travel within the Middle East, but also arrivals to these destinations from South Asian markets, which are prominent, especially for religious tourism and visiting friends and relatives. Visits to MENASA from other regions are also set to decline, but by a comparatively modest 5%.

The outlook is more positive for 2027, with a robust recovery and growth in international travel expected to accelerate both worldwide and for MENASA. The latter's growth in 2027 (+17%) will outpace the global aggregate (+8%) reflecting a catch-up from this year's declines, driven by a recovery in arrivals to and from Middle Eastern countries. However, uncertainty remains elevated and there are downside risks to the near-term outlook.

Resilient long-run outlook for MENASA and the World

Travel demand remains resilient, underpinned by strong fundamental drivers, and more effective responses by industry stakeholders in response to disruption. The long-run outlook for travel activity, both globally and for MENASA, remains positive. After the 2027 recovery, strong growth is expected to continue through to the end of the decade and beyond. Worldwide, total visitor nights are expected to rise to more than 29 billion, and spending within destinations to US$10 trillion.

International Arrivals Growth

	Intra-regional (Within region travel)		Inter-regional (Outside of region travel)	
	MENASA	Global	MENASA	Global
2019-2025	26%	6%	19%	3%
2026 Annual	-27%	6%	-5%	-1%
2027 Annual	26%	7%	12%	11%

Source: Tourism Economics 2026

2030 Tourism Activity

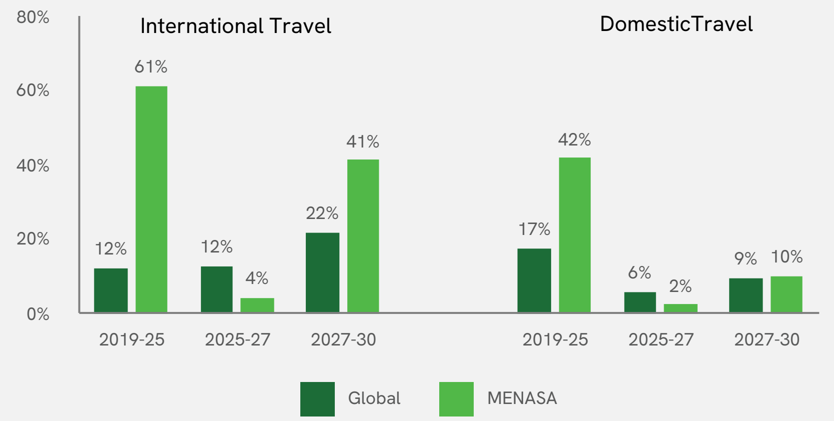
	Visitor Nights		In-Destination Spend	
	MENASA	Global	MENASA	Global
2030	5.2bn	29.1bn	$1.0tn	$10.0tn
vs 2025	+1.1bn	+5.2bn	+$0.3tn	+$2.8tn
vs 2025	+25%	+22%	+50%	+40%

Source: Tourism Economics 2026

MENASA will outpace worldwide growth, particularly for international travel. By 2030, visitor nights are expected to rise by more than 50% from 2025 levels, compared to a global increase of 37%. This is a larger increase than for arrivals, as average length of stay in the region is expected to increase. Alongside this, MENASA's share of global international nights will rise to 23% in 2030, up from 21% in 2025, continuing the gain in prominence achieved in recent years. These gains will be driven by the GCC, as continued investment in tourism infrastructure, marketing and events attracts international visitors. Domestic activity in MENASA will grow more modestly, in line with the global increase of 15% by 2030, despite more subdued population growth as propensity to travel will improve further.

International and Domestic Travel Growth

Visitor nights growth



Source: Tourism Economics 2026

Global travel has become more resilient in recent decades:

- **Travel activity has consistently returned to pre-crisis levels.**
- **The average recovery period has shortened from 24 months in the early 2000s to just 10-12 months in recent years.**
- **Proactive measures by tourism stakeholders are associated with faster recoveries.**

Source: Tourism Economics 2026

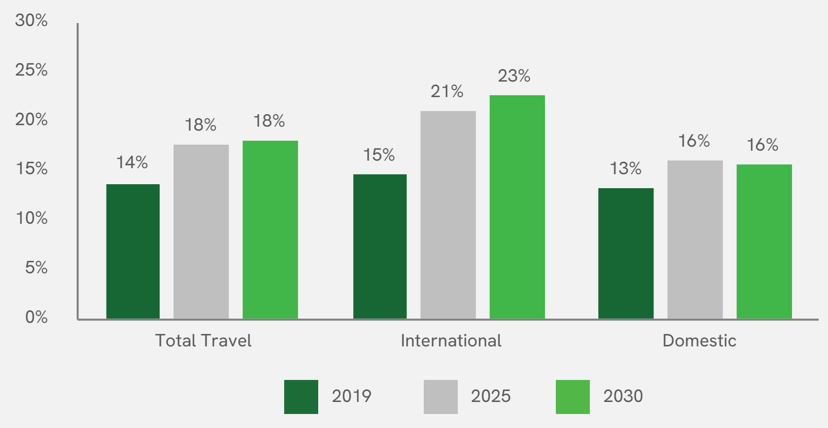
By 2030, international visitor nights in MENASA are expected to rise more than 50% from 2025, outpacing global growth of 37%.

Source: Tourism Economics 2026

The strength in travel demand is expected to continue well beyond the next five years, with key economic factors and consumer trends likely to support tourism growth for years to come. In the coming decade, annual growth in total tourism activity is projected to outpace the global economy by a full percentage point. Further out, Google and Alvarez & Marsal project that international trips will grow at a similar pace through to 2050, with these volumes to more than double to 3.5 billion. This is in line with the Tourism Economics outlook, with growth in international activity to continue at an average of more than 2.5% from 2035 to 2050.

MENASA Share of Global Travel

Visitor nights



Source: Tourism Economics 2026

Growth in Global Travel and Economic Activity

(CAGR 2025-2035)

Total visitor nights: 3.4%

Real GDP: 2.5%

Source: Tourism Economics 2026

Source: Tourism Economics 2026; Google and Alvarez & Marsal 2026

Leisure remains the dominant segment, but business travel set to grow more quickly

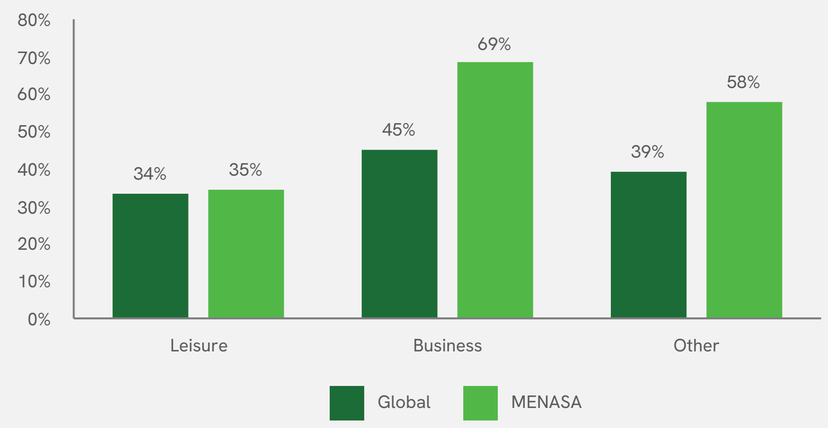
Business travel is projected to grow more quickly than other segments of international tourism in coming years. This partly reflects catch-up from a more muted recovery for business tourism from the pandemic, with business visits still below 2019 peaks. This rebound will be supported by ongoing activity in the MICE sector, with the events industry continuing to attract cross-border visitors. International business nights are set to grow more than 40% worldwide between 2025 and 2030, compared to an increase of one-third for leisure travel.

A similar trend is projected for MENASA, alongside the Middle East's hosting of major events, state-of-the-art infrastructure for conferences and exhibitions, and increasingly close business ties with inter-regional markets. Indeed, the uplift in international business travel in MENASA will exceed 60% between 2025 and 2030, comfortably outpacing the global trend.

Nevertheless, leisure travel will remain the much larger segment, accounting for almost 60% of global inbound visits in 2030, and 54% of those in MENASA, with business travel set to comprise roughly a further 10% for both geographies. Travel for purposes other than leisure or business is more prominent in MENASA, and growth will be strong compared to the global uplift. This segment of travel comprises visits to friends and relatives, as well as short-term travel for education or for religious purposes. Continued expansion in pilgrimages and other religious visits to the Middle East, particularly Saudi Arabia, will remain a key driver of this segment.

International Travel Growth (2025-2030)

Visitor nights by segment



Source: Tourism Economics 2026

2030 Share of International Tourism Visits by Segment

	MENASA	Global
Leisure	54%	59%
Business	12%	13%
Other	33%	29%

Note: Figures may not sum to 100% due to rounding
Source: Tourism Economics 2026

TRAVEL INDUSTRY DRIVERS

The robust growth in global leisure travel stems from economic and demographic factors: lasting shifts in who can afford to travel for leisure, how they prioritise travel, and the supply of services to meet that demand.

Growing global middle class

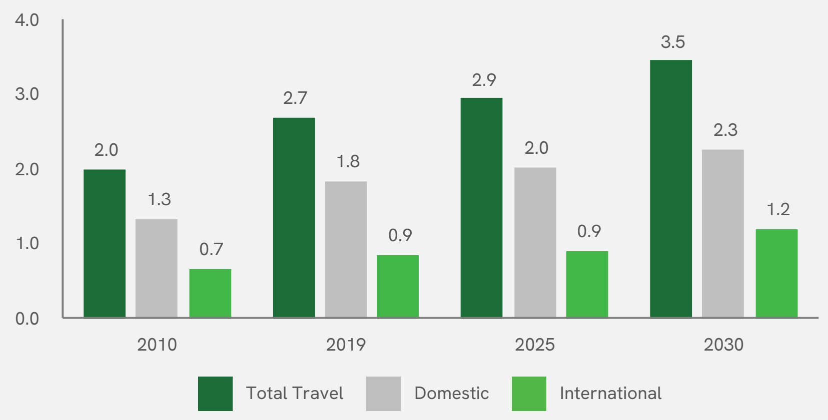
Rising incomes in developing economies are expanding both the number of travellers and the frequency of their trips. Propensity to travel can be measured as nights spent in paid accommodation per person per year. This metric will increase to 3.5 nights by 2030, up from 2.9 in 2025 and 2.0 in 2010, driven largely by rising household income.

Tourism Economics projects the share of the world's population classed as potential travellers to climb from around 25% in 2000 to 40% by 2030 and just under 50% by 2040, with India and China set to add the largest number of new travelling households. Potential travellers are quantified as those with sufficient disposable income to travel, earning over identified threshold values in Tourism Economics' analysis.

Alongside geographic shifts in wealth, economic pressures are creating increasingly polarised patterns of travel demand. As emerging markets continue to add entry-level travellers in large numbers, cost-of-living pressures are squeezing the middle class in mature markets, while wealthier individuals largely remained insulated. According to the 2026 Deloitte Summer Travel Survey, higher-income households ($100k+) will account for 55% of U.S. summer travellers in 2026, up five points from the previous year.

Global Propensity to Travel

Nights in paid accommodation per capita



Source: Tourism Economics 2026

Almost half of households worldwide are expected to be able to afford to travel by 2040, up from less than 40% today.

Source: Tourism Economics 2026

In 2030, domestic travel will account for almost two-thirds of global visitor nights, and more than half in MENASA.

Source: Tourism Economics 2026

While international travel is growing more strongly, domestic travel remains the backbone of the industry and will account for almost two-thirds of global activity by 2030. Domestic tourism is often where individuals first form their travel habit, acting as a pipeline for future international tourism. This is also true in MENASA, though to a lesser extent: domestic travel will make up 56% of destination activity in 2030, but this is lower for the Middle East (40%). The balance of growth, however, is tilting towards outbound travel.

Rising prioritisation of travel within household spending

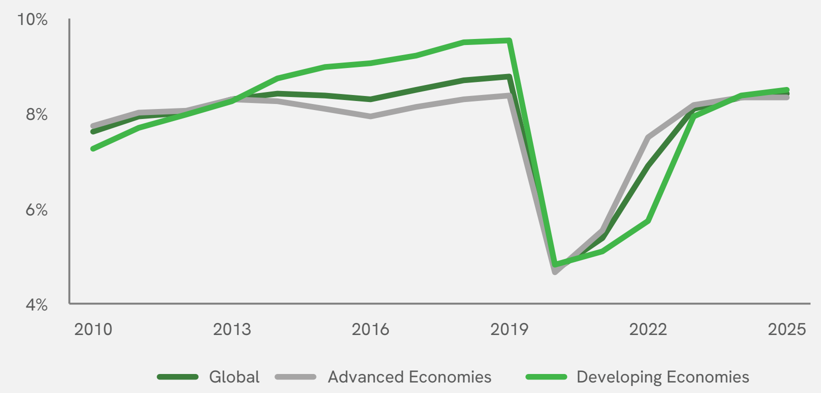
Despite squeezed household budgets linked to cost-of-living pressures, consumers are protecting their leisure travel spending. The latest consumer research from Tourism Economics, surveying 4,000 travellers across eight source markets, finds that three in four agree that taking leisure trips each year is an important priority, including two in five who strongly agree.

Part of that resilience reflects a longer-running shift in what consumers value, as spending on experiences outpaces that on material goods. McKinsey's 2026 assessment of global consumer spending finds that spending on travel experiences grew at 4.4% between 2023 and 2025, roughly in line with pre-pandemic pace, while growth in non-essential goods slowed to 0.8% from 2.3%.

The leisure travel share of total household consumption has returned to pre-pandemic levels across advanced economies and continues to recover among developing markets. In Tourism Economics' quarterly tracking survey of industry professionals, almost three quarters expect consumers to spend a greater share of their income on living costs in 2026, yet around two thirds expect travel's share to hold steady or rise.

Leisure Travel Spend

Share of total consumption



Source: Tourism Economics 2026

In 2025, leisure travel accounted for 8% of global consumer spending, with this share expected to rise in the coming years.

Source: Tourism Economics 2026

Expanding tourism infrastructure

Supply is contributing to market growth as much as demand. New routes, longer-range aircraft, such as the A321XLR and 787, and stronger hub networks have made lower-volume city pairs commercially viable.

According to the International Air Transport Association (IATA), international seat capacity has grown by around a third over the past decade, with available seat kilometres up 34% between 2015 and 2025 and now running roughly 6% above their pre-pandemic peak. The Middle East has led that expansion, adding 37% more capacity over the decade and lifting its share of global international seat kilometres from 11% to 15%. Airfares have fallen over 30% during the last decade aided by this capacity growth and, despite continued uncertainty over oil prices, are expected to remain competitive. Average real fares are projected to remain around 35% below 2010 levels throughout the 2030s, according to Tourism Economics' latest projections.

Accommodation supply is also expanding and diversifying alongside air connectivity, as villas, apartments and boutique guesthouses on major booking platforms provide additional, alternative supply beyond traditional hotel offerings.

Source: Tourism Economics 2026

According to hospitality analytics firm Lodging Econometrics, based on its Q2 2026 analysis, the global hotel development pipeline is at an all-time high, with nearly 16,000 projects, representing more than 2.4 million rooms, either under construction, in planning or announced. Projects already under construction account for more than one million rooms globally, highlighting the continued expansion of accommodation supply in response to growing travel demand.

Development activity is strong in the Middle East, where the pipeline comprises more than 700 projects and nearly 180,000 rooms, almost half of which are currently under construction. The number of hotel projects and rooms in the pipeline increased 11% and 10%, respectively, compared with 2025, signalling continued momentum across the region.

Accommodation supply and demand are also evolving in ways that present new opportunities.

Agoda's 2026 Travel Outlook Report finds that secondary cities in Asia accounted for 34% of accommodation searches on its platform in the first half of 2025, having grown 15% faster than traditional hubs over two years.

Meanwhile, AI is increasingly enabling travel providers to sell services through their own channels, extending what is bookable beyond the room or the seat. Payment and booking infrastructure is becoming a competitive capability in its own right.

KEY THEMES RESHAPING TRAVEL

The scale of opportunity created by demand- and supply-side drivers is clear. Yet how people travel is shifting just as quickly as how many people travel. Five themes are playing an outsized role in shaping the landscape ahead.

1. Unique and impactful experiences

Travel is increasingly built around a specific passion, with the experience chosen first and the logistics arranged around it. GetYourGuide's Hidden Trends List 2026 records skill workshops up 59% in the year to November 2025, with three in ten Gen Z users saying they would rather learn a skill than buy a souvenir. The classic beach holiday is shifting towards active and adventure travel, while newer niches such as mindful travel are moving into the mainstream.

The same search for distinctiveness is redistributing travellers, drawn to lesser-known destinations for their culture and landscape as much as their lower prices. Tourism Economics' latest survey data shows that more than half (56%) of consumers are more interested in visiting new destinations than they were two years ago, while half are more interested in sampling local food and drink and two in five meeting locals.

Events have become a primary reason to travel. In Tourism Economics' latest traveller research, three in ten report greater interest in event-related travel than two years ago, and the effect runs deeper than a short spike in arrivals: live music residencies are increasingly planned as tourism infrastructure, and major sporting fixtures are beginning to anchor demand in shoulder months. The experience has therefore become the product.

56%
of consumers are more interested in exploring new destinations than they were two years ago, rising to
68%
among prospective visitors to MENASA.

Source: Tourism Economics 2025

2. Overtourism and sustainability considerations

The definition of sustainable travel has become more practical and more locally anchored. Travellers increasingly prioritise spending that benefits local communities, deepens their personal connection with a destination, or contributes to nature and wildlife preservation. Cruise industry trends show the same pattern; research of consumers interested in small ship cruising by Tourism Economics and Travelzoo finds that locally sourced food and drink onboard ranks as the most important sustainability factor, ahead of cleaner fuels and waste reduction.

Stated intent, however, continues to outrun action. Although Agoda's 2026 Sustainable Travel Survey finds that 77% of travellers across eight Asian markets rate sustainability as important in 2026, up from 68% a year earlier, the gap between what travellers say they value and what they ultimately book remains a practical planning assumption.

As overtourism dominates global headlines during peak tourist seasons, crowding has also become a mainstream consideration. A survey of 7,000 members by Going, a U.S. flight-deal alert platform, finds more than seven in ten travellers weigh overtourism when choosing where to go. Tourism Economics' consumer research reveals that three in ten actively avoid destinations due to overcrowding concerns. The latest industry polling by Tourism Economics reveals that two in five professionals describe overtourism as a noticeable issue in their country, and around three quarters of DMOs and

77% travellers rated sustainability as important when choosing travel options in 2026, up from 68% a year earlier.

Source: Agoda 2026

Around a third of travellers are deterred from visiting destinations due to overcrowding.

Source: Tourism Economics 2025

NTOs report taking active steps to manage peak season pressure.

With some of the sharpest crowding backlash concentrated in Southern Europe, travellers are seeking alternatives that offer comparable climate and culture without the crowds. Positioning Mediterranean-adjacent MENASA destinations such as Morocco as the uncrowded alternative to saturated European hotspots is a key commercial proposition.

3. Premiumisation of travel

Premium demand is growing and broadening. Tourism Economics and CoStar's June 2026 US hotel industry forecast projects that luxury hotels will outperform all other US chain scales in RevPAR growth in 2026, at 5.3% against 2.8% for the industry overall. The pressure sits at the other end of the market, where economy hotels are expected post softer demand and room rate performance. A widening gap between the top and bottom is one of the clearest patterns in the sector.

Premium travel is also reaching further down the market, with 'affordable luxury' formats drawing younger, experience-seeking consumers well beyond the high-net-worth base. A 2024 McKinsey study identifies a growing cohort with net worths between $100,000 and $1 million, accounting for 35% of the market. This group skews younger than the established luxury base and is directing a rising share of its wealth towards upscale travel. Luxury is consequently harder to define by wealth tier alone, instead resting on a selective willingness to pay for what feels exclusive or personal.

Going's survey finds that travellers name better accommodation, an upgraded airline seat and a standout experience as the things worth paying extra for, with premium economy the fastest growing cabin in 2026.

Tourism Economics' latest consumer survey finds luxury experiences matter to more than half of travellers at the booking stage, while around a third report greater interest in premium experiences than two years ago.

4. Evolving perceptions of value

Volume and value are growing at different speeds as traveller spending behaviour shifts.

Tourism Economics' data points to slowing growth in average spend. Global inbound tourism spending rose 8% in 2025, compared with 6% growth in visits, which resulted in a 2% increase in average spend per visit. However, this was down from increases of 4% in 2024 and 8% in 2023. A similar slowdown is evident in the Middle East, where average spend per visit rose by 2% in 2025, compared with 14% in 2023.

PhocusWire's Supercharging Travel whitepaper, produced with accommodation booking platform, RateHawk, which draws on a survey of 1,300 travel professionals, goes further by reporting a decline in average spend per traveller globally.

Changes in average spending partly reflect growth among newer, lower-spending travellers and in lower-cost markets. This is happening alongside a rise in price sensitivity: Tourism Economics consumer tracking shows that 43% of travellers are deterred from a destination due to cost. At the same time, spending is becoming more concentrated among affluent travellers, allowing total revenue to rise even as the typical traveller operates within a tighter budget.

The split in demand opens opportunity at both ends. In 2025, half of travellers reported growing interest in discounts compared to two years earlier, while 35% reported growing interest in premium experiences.

Price is felt hardest on trip essentials. It strongly influenced accommodation choice for

47%

of travellers on their last international trip, against

35%

for activities and

28%

for shopping.

Source: Tourism Economics 2025

5. The growing role of technology

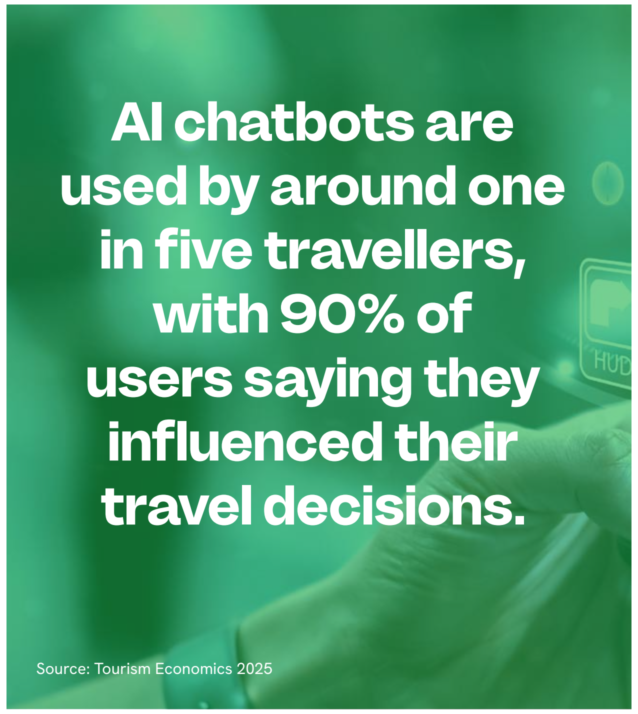
AI has become a primary entry point for travel planning in 2026, although its role in inspiration runs ahead of its importance in travel booking. Tourism Economics' consumer research finds that 18% of travellers used an AI chatbot when planning or booking their most recent international trip, with 91% of those users describing it as influential and half of them as very influential. Adobe Digital Insights records AI-driven visits to US travel sites up 233% year on year in Q1 2026.

Visibility through this channel is consequently an immediate commercial concern. Hotelrank.ai's AI Hotel Landscape 2026, drawing on more than 245,000 hospitality sources and over 31,000 properties, finds that most hotels do not appear in AI-generated recommendations, while those that do are surfaced according to consistent, measurable patterns. How a property is described across OTA listings, editorial coverage and its own website determine the searches it appears in.

However, the most commercially significant uses of AI in travel are often invisible to travellers. Embedded in search rankings, recommendations and customer service, AI is already driving conversions for major online travel agencies. Expedia handles more than 250 million service interactions annually, over 30% of which are AI-powered, and attributes record attach rates to AI-driven personalisation. Booking Holdings has reported a double-digit decline in customer service costs per booking and a positive overall return on its AI investment.

The same technologies are reshaping operations. Airlines and hotels are moving towards continuous, demand-led pricing and automated revenue management, while airports are scaling biometric processing from trials into routine use. Digital travel credentials are also beginning to consolidate identity, payment and booking into a single wallet. Highlighting that traveller appetite is exceeding delivery, recent research by SITA, an air transport technology provider, finds that 79% of passengers are prepared to hold a digital identity on their phone, with two thirds willing to pay for the convenience.

Agentic AI represents the next stage, moving from assisting travellers during planning to managing the journey end to end. Nevertheless, human contact retains real value; Phocuswright finds that the ability to speak with a person remains the most commonly reason for using a travel agent, at 33%. This echoes a broader pattern running through 2026 demand, where travellers are actively seeking out local guides, hosts and communities rather than frictionless anonymity. Automation and human connection are not competing propositions, but point to a model that positions automation in the background and people at the points of interaction that matter most.



Source: Tourism Economics 2025

Source: SITA 2025

4. Destination Trends

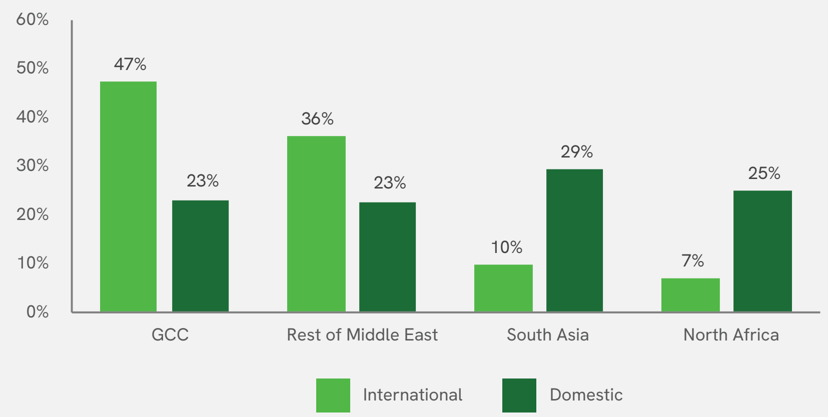
MENASA'S INBOUND TRAVEL PROFILE

Growth across the MENASA region is far from homogenous. The pace and scale of expansion varies considerably across sub-regions, destinations and travel segments reflecting distinct demand drivers, the extent of market maturity, policy priorities and relationships with diverse source markets. The Middle East, and especially the GCC, is the major engine of MENASA's growth, fuelled by significant investment in tourism infrastructure, destination-development programmes, and national strategies designed to diversify economies beyond hydrocarbons.

The GCC remains the dominant inbound region

The GCC is the largest destination sub-region in MENASA for international travel. In 2025, GCC destinations received 730 million international tourism nights, generated by 79 million visitors who spent $105 billion. The GCC alone accounted for almost half of all inbound visitor nights in MENASA, with this share set to rise a further 5 percentage points by 2030. The broader Middle East, including the GCC as well as Egypt, Türkiye and others, made up over 80% of international visitor nights in MENASA. By contrast, the inbound markets for South Asia and North Africa are relatively small and domestic travel is more prominent, with each accounting for a larger share of domestic nights in MENASA than the GCC and rest of the Middle East.

2025 MENASA Inbound and Domestic Travel
Share of total visitor nights in MENASA



Note: Figures may not sum to 100% due to rounding
Source: Tourism Economics 2026

2025 Travel Market Activity

	Total Travel		International		Domestic	
	Nights	Spend	Nights	Spend	Nights	Spend
Middle East	2.5bn	$358bn	1.3bn	$203bn	1.2bn	$155bn
GCC	1.3bn	$169bn	0.7bn	$105bn	0.6bn	$64bn

Source: Tourism Economics 2026

Inbound travel outpacing domestic, driven by the GCC

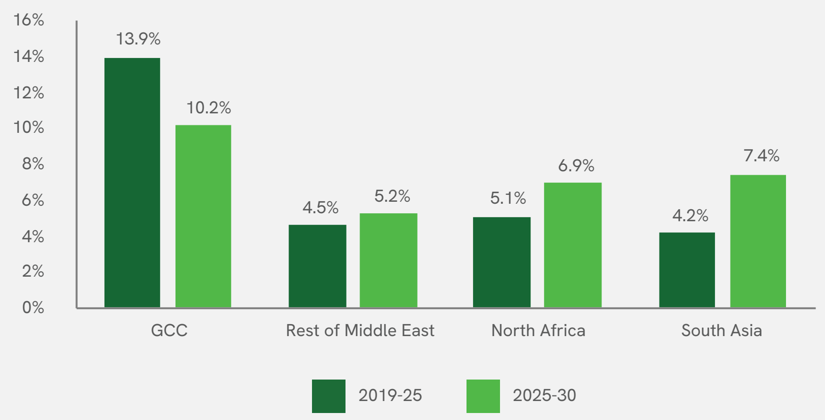
As well as being the largest inbound region in MENASA, the GCC has seen the strongest growth in recent years. International visitor nights in GCC destinations grew at an annual rate of almost 14% between 2019 and 2025, nearly triple that for the rest of MENASA. This outperformance is set to continue, supported by sustained investment in tourism infrastructure and major events across the GCC, which will further strengthen the region's appeal to international visitors.

International visitor nights to the GCC are forecast to grow at more than 10% annually in the coming five years. This is a slower pace than since 2019, as the destinations mature, but remains much stronger than the 6% expected globally. By 2030 inbound volumes to the GCC will exceed 2025 by over 60%. Across the broader Middle East, inbound volumes will increase a little less than half, while North Africa and South Asia are set to see gains of around 40%.

Despite the varying pace of inbound growth across MENASA, it will continue to outperform domestic activity and gain share of overall travel in all sub-regions. By 2030, the inbound share of nights will rise to almost 60% in the Middle East and 63% in the GCC. Domestic travel growth will be steady, with increases of 12% and 14% expected over the period for the two sub-regions and the GCC, respectively. Domestic growth will be slightly stronger in South Asia (17% uplift is projected by 2030) and will remain the dominant segment, supported by the large internal Indian market. A similar pattern is evident in North Africa, with inbound tourism making up less than one-fifth of total visitor nights.

MENASA International Travel Growth

Arrivals growth (CAGR)



Source: Tourism Economics 2026

The GCC will drive international visitor growth in coming years, with nights increasing 10% annually over the next five years, compared to 6% globally.

Source: Tourism Economics 2026

By 2030, the Middle East is expected to welcome 66 million more inbound visitors (+39%) and generate an additional $116 billion in visitor spending (+57%) than in 2025.

Source: Tourism Economics 2026

Alongside its strong inbound travel growth, the Middle East is gaining global market share. Including the GCC, the region made up 18% of global inbound nights in 2025, up from 12% in 2019, and set to rise to 19% in 2030. The GCC destinations, specifically the UAE and Saudi Arabia, are the key drivers of these gains. The Middle East is less prominent among global domestic travel, making up around 7% of volumes. Meanwhile, South Asia and North Africa each account for only around 2% of global inbound travel. However, their large domestic markets represent 5% and 4%, respectively, of worldwide domestic travel.

Growth in inbound travel will outpace domestic across MENASA through 2030. In the Middle East, inbound will account for 59% of nights by 2030, while domestic travel will remain dominant in North Africa and South Asia.

Source: Tourism Economics 2026

International Share of Visitor Nights

	2025	2030
Middle East	52%	59%
GCC	55%	63%
North Africa	14%	17%
South Asia	16%	19%

Source: Tourism Economics 2026

The Middle East accounted for 18% of global inbound visitor nights in 2025. Driven by the GCC, this will increase slightly by 2030.

Source: Tourism Economics 2026

Leisure travel is the key growth driver

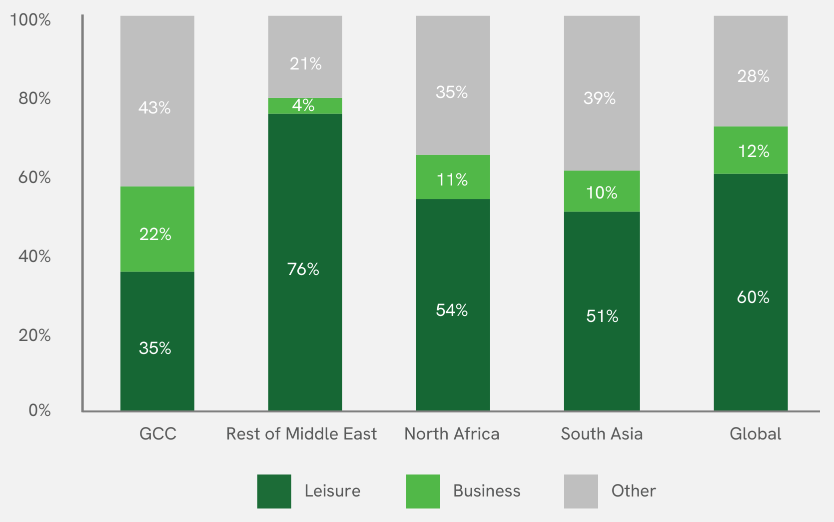
The prominence of different inbound travel segments varies across MENASA, but leisure remains important in every sub-region. Leisure visitors account for more than three-quarters of arrivals to the Middle East outside the GCC, driven by large and well-known holiday destinations such as Türkiye and Egypt. This is well above the global leisure share (60%) and that of North Africa and South Asia (a little over half). However, the GCC is different with leisure visits accounting for only 35% of arrivals, as travel for other purposes remains the largest segment due to the high volume of religious travel to Saudi Arabia. This other travel category also includes visits to friends and relatives (VFR), which is a significant and stable proportion of demand.

Business travel is also relatively more important in the GCC, making up 22% of arrivals in 2025, well above the global average (12%) and elsewhere in MENASA (6%). This reflects significant regional investment in facilities for business events activity and growing business ties with other countries.

While leisure tourism is a comparatively smaller segment for the GCC, these visitors will drive inbound growth in coming years. Leisure arrivals to the GCC are expected to increase at an average annual rate of 8.7% in the next five years, stronger than for any other segment or sub-region in MENASA. This uplift will also outpace the 7.1% average annual growth for leisure travel to the GCC between 2019 and 2025, though this was impacted by the disruption of the Covid-19 pandemic. Business visits to the GCC will also grow relatively strongly, outpacing the

2025 International Travel Composition

Share of inbound visits



Note: Figures may not sum to 100% due to rounding
Source: Tourism Economics 2026

Inbound Visits Growth By Segment, 2025-30 (CAGR)

	Leisure	Business	Other
GCC	8.7%	8.3%	7.4%
Rest of Middle East	5.0%	8.7%	7.1%
North Africa	3.3%	3.0%	4.3%
South Asia	6.8%	7.0%	7.9%
Global	5.4%	7.2%	6.3%

Source: Tourism Economics 2026

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TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

large and established other travel segment. Elsewhere in the Middle East, leisure growth will be more modest, partly reflecting the size and maturity of these holiday destinations.

The GCC will gain share of the global international leisure market, from 4.5% in 2025 to 5.6% in 2030. This represents slower growth than in recent years, when the region's share more than doubled, but will still enable the broader Middle East to retain a substantial 17% share of the global leisure market. GCC gains will be offset as Egypt and Türkiye grow more slowly than several emerging and global destinations.

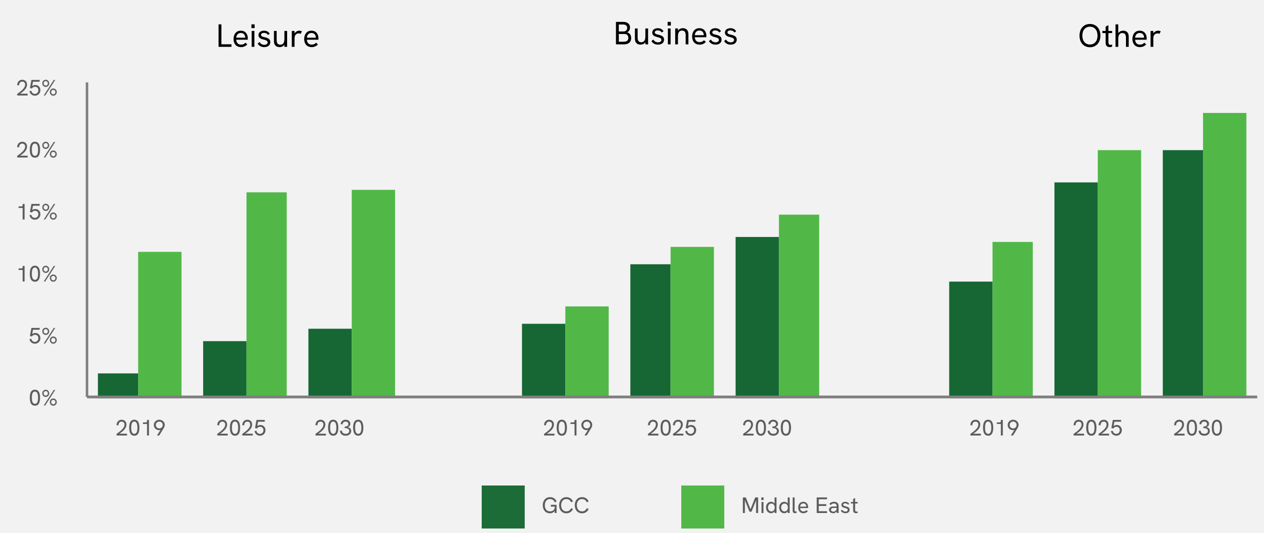
GCC destinations will also gain share of international business, driven by business events and expanding inter-regional commercial ties. The GCC share of other travel will rise as well as religious tourism continues to grow, while population growth, including immigration, will boost visits to friends and relatives.

Leisure accounts for 35% of arrivals to the GCC, compared with 76% in the rest of the Middle East and 60% globally. However, it will be the GCC's fastest-growing segment in coming years, outpacing growth elsewhere in MENASA.

Source: Tourism Economics 2026

GCC and Overall Middle East Share of Global International Travel

Share of inbound nights by segment



Source: Tourism Economics 2026

SOURCE MARKET OPPORTUNITIES

Long-haul source markets are driving leisure growth

Visitors from outside of the Middle East, defined as inter-regional travellers, are crucial to inbound tourism, and will remain so in coming years. MENASA sub-regions rely heavily on inter-regional arrivals, partly due to their relatively small geographies. In 2025, two-thirds of inbound visitors to the Middle East came from outside the region, with Europe providing the vast majority of these. North Africa (72% of arrivals) and South Asia (80%) were even more reliant on inter-regional source markets, with Europe again prominent, highlighting the importance of longer-haul travel to their visitor economies.

Growth in arrivals to the Middle East, and the GCC more specifically, in coming years will be driven by inter-regional source markets, reflecting the region's success in attracting new, more distant audiences as its tourism offering expands. This contrasts with recent trends, where growth was stronger for intra-regional arrivals. Indeed, the increase in visitors from within the same region over 2019-2025 was more than twice the uplift of arrivals from elsewhere for both the GCC and the wider Middle East, as GCC residents in particular increased their propensity for outbound travel.

2025 Inter-regional Share of Arrivals

Middle East: 67%

North Africa: 72%

South Asia: 80%

Source: Tourism Economics 2026

2025 Europe Share of Arrivals

Middle East: 41%

North Africa: 59%

South Asia: 32%

Source: Tourism Economics 2026

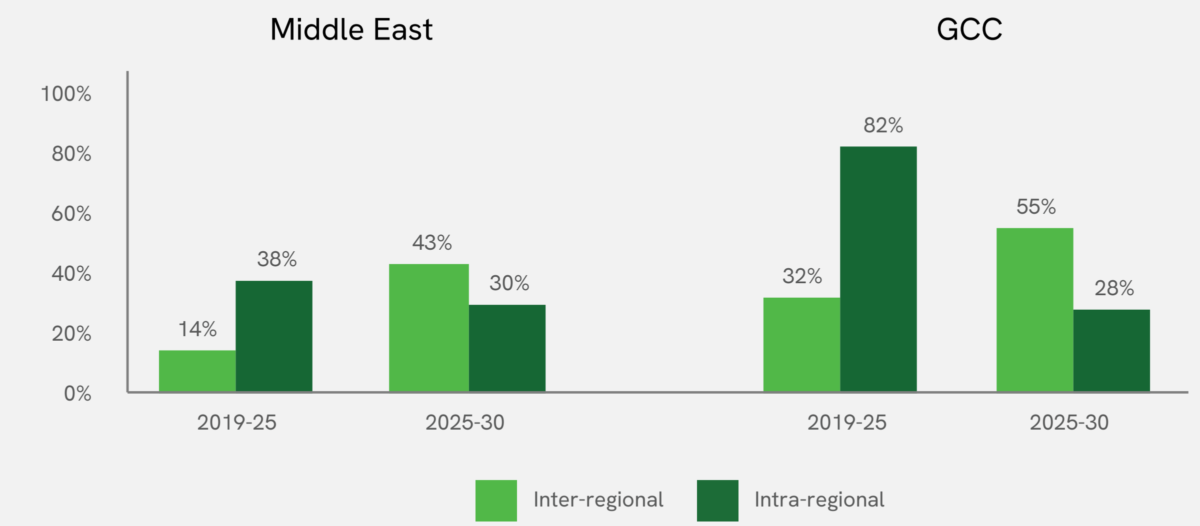
Inter-regional source markets account for most arrivals to the Middle East and are expected to drive future expansion, despite stronger intra-regional growth in recent years.

Source: Tourism Economics 2026

However, other global regions, especially Asia and Europe, will drive inbound leisure growth going forward. Visits from outside the Middle East are projected to increase 43% between 2025 and 2030, compared to 30% for within-region visits. In the GCC, this inter-regional growth will be even higher, with a gain of 55% expected (versus 28% for intra-regional). Inter-regional source markets will also drive growth in arrivals to North Africa (+25% between 2025 and 2030) and South Asia (+44%).

Middle East and GCC Growth in International Travel

Growth in inter-regional and intra-regional visits



Source: Tourism Economics 2026

UAE and Saudi Arabia set to lead MENASA inbound leisure growth

Türkiye and Egypt have long been the largest inbound leisure destinations in the Middle East, being renowned holiday locations. Türkiye draws visitors through a mix of cultural heritage, coastlines and diverse landscapes and experiences. Egypt pairs ancient monuments with year-round beach and resort destinations along the Red Sea.

These markets are both expected to achieve solid increases in leisure visits, but the growth outlook is strongest for several GCC countries. The UAE, which welcomed almost 10 million leisure arrivals in 2025, is projected to see an uplift of 48% in inbound visits over the next five years, supported by the ongoing expansion in hotel capacity, hosting of major events and further development of tourism infrastructure. Similar drivers are behind the extraordinary growth Saudi Arabia has achieved in recent years, as the Kingdom has invested heavily in tourism infrastructure, events and marketing the destination to global source markets. Inbound leisure visits to Saudi Arabia are set to almost double by 2030, with the country catching up to match the UAE as the GCC's top market by the end of the decade. Growth will also be solid in Qatar and Oman, though from much lower volumes.

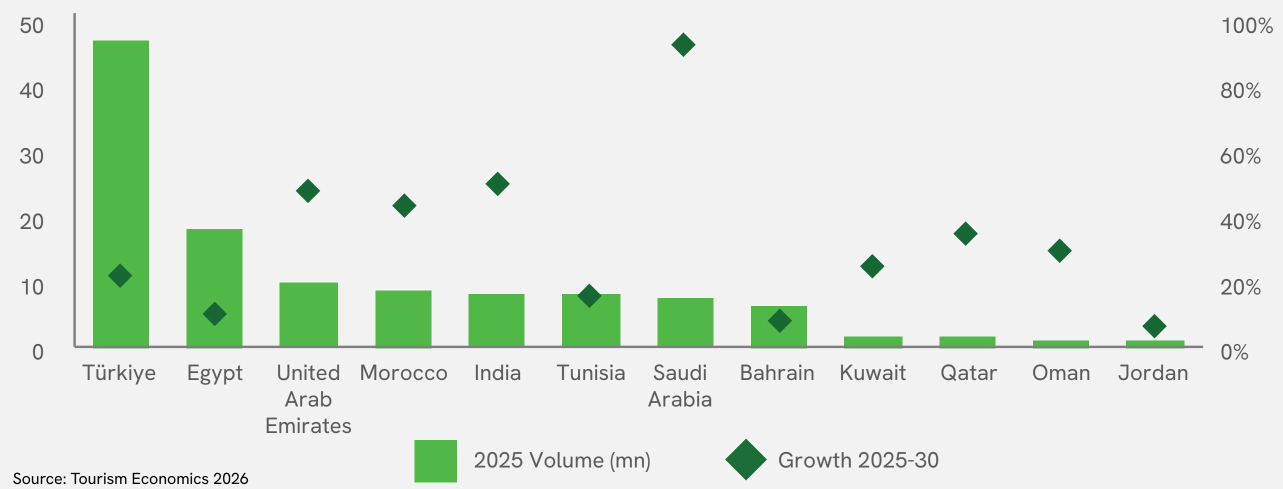
Elsewhere in MENASA, Morocco is expected to see an uplift of 40% in leisure arrivals by 2030. Near-term growth is supported by improvements in tourism infrastructure, travellers' increasing focus on new experiences and value-for-money, as well as some near-term substitution by European visitors seeking to avoid the disruption in Middle Eastern destinations. Morocco is also investing in additional hotel capacity and air routes, ahead of co-hosting the 2030 FIFA World Cup. India is set for particularly strong growth - leisure arrivals are projected to increase 50% in the coming five years, driven by demand from elsewhere in Asia and supported by the addition of new air routes.

The UAE is the GCC's largest inbound leisure market, with arrivals expected to grow 50% over the next five years. Saudi Arabia is set to grow even faster, catching up with the UAE for inbound leisure visits by 2030.

Source: Tourism Economics 2026

Large and Growing MENASA Inbound Leisure Destinations

2025 volume of visits in millions (left side) and expected growth to 2030 (right side)



Source: Tourism Economics 2026

Europe is home to many of the Middle East's largest leisure source markets

European markets are prominent among the top sources of inter-regional leisure travel to the Middle East. Germany is the largest, accounting for 41 million visitor nights in 2025 (or 13% of all from outside the region), followed by the United Kingdom. Italy, France, Poland and the Netherlands are also significant source markets.

Although much smaller than the top two, each is comparable in visitor nights to India. The United States is also a key source of leisure visitors, providing 13 million nights.

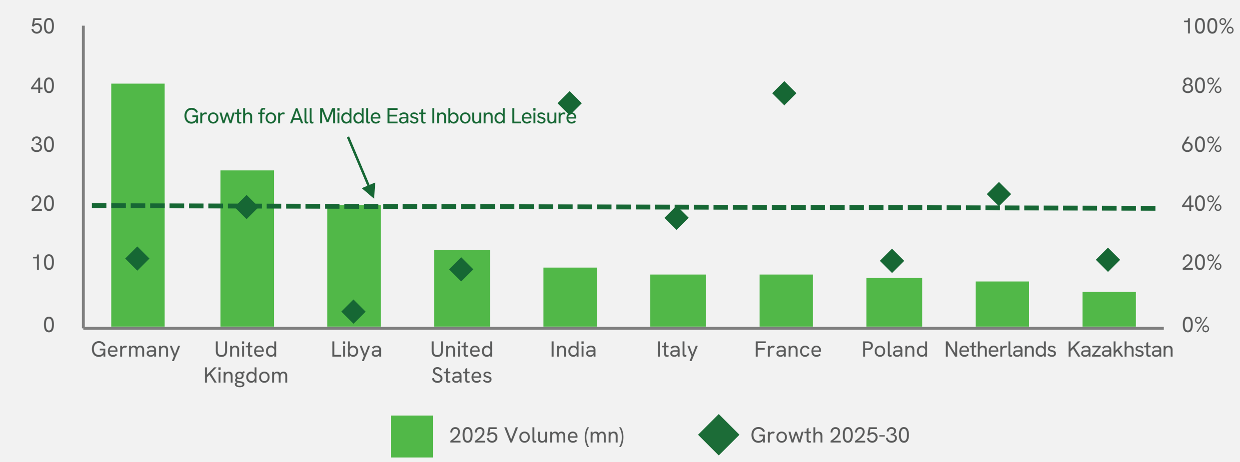
Growth will be strongest for travel from France and India, comfortably outpacing the 40% increase projected for total inter-regional leisure nights in the Middle East. As a result, both will become more important as leisure source markets for destinations in the region. Continued improvements in connectivity are important to deliver this growth as recent research showed that over 50 million journeys between India and the UAE are at risk without capacity investment, based on a recent Tourism Economics study conducted on behalf of Etihad Airways.

Germany and the UK are the Middle East's largest source markets for inbound leisure nights, while France and India are expected to generate particularly strong growth.

Source: Tourism Economics 2026

Large Inter-regional Source Markets for Middle East Leisure Travel

2025 volume of visits in millions (left side) and expected growth to 2030 (right side)



Source: Tourism Economics 2026

Asian source markets to grow strongly and gain importance

While Europe and North Africa are home to several of the Middle East's largest inter-regional source markets, travel will grow at the fastest pace from many countries in Asia. Leisure nights from China are projected to see the largest uplift, with growth of 160% expected between 2025 and 2030. This will result in China's share of inter-regional leisure travel to the Middle East increasing 1.2 percentage points (the largest gain of all markets) to 2.5%. Nights stayed by leisure visitors from Indonesia, Malaysia, Thailand, Japan and Singapore are set to increase by more than 80% in the coming five years.

2025-2030 Growth in Share of Inter-regional Leisure Travel to Middle East (Selected Markets)

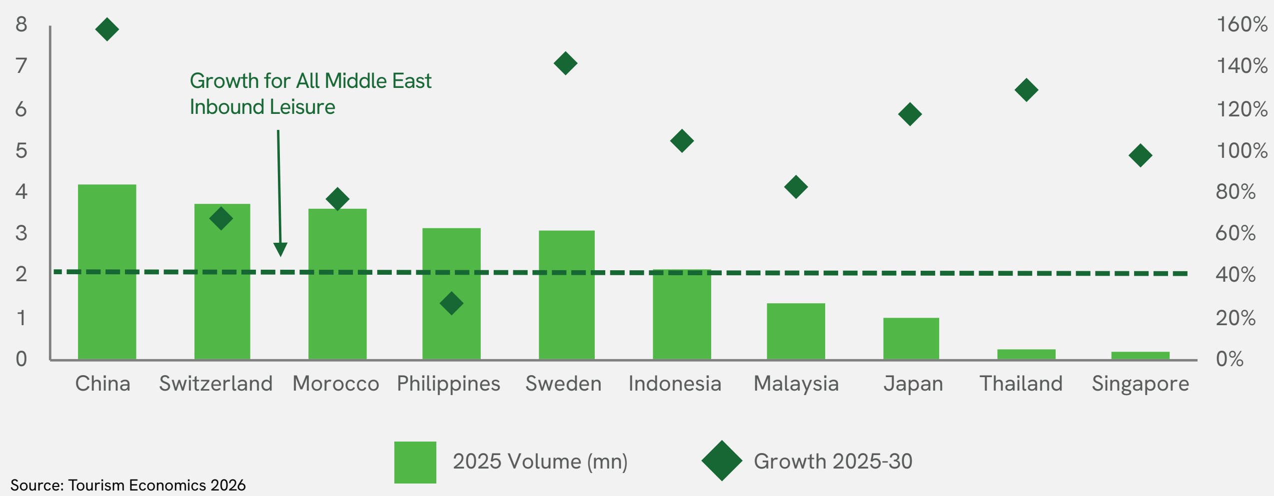
China +1.2ppt
India +0.8ppt
France +0.7ppt
Indonesia +0.3ppt
Morocco +0.3ppt

Source: Tourism Economics 2026

China will be among the Middle East's fastest growing leisure markets between 2025 and 2030, with nights expected to rise 160%.

Source: Tourism Economics 2026

Prominent Inter-regional Growth Markets for Middle East Leisure
2025 volume of nights in millions (left side) and expected growth to 2030 (right side)



Source: Tourism Economics 2026

Growing role of China and India

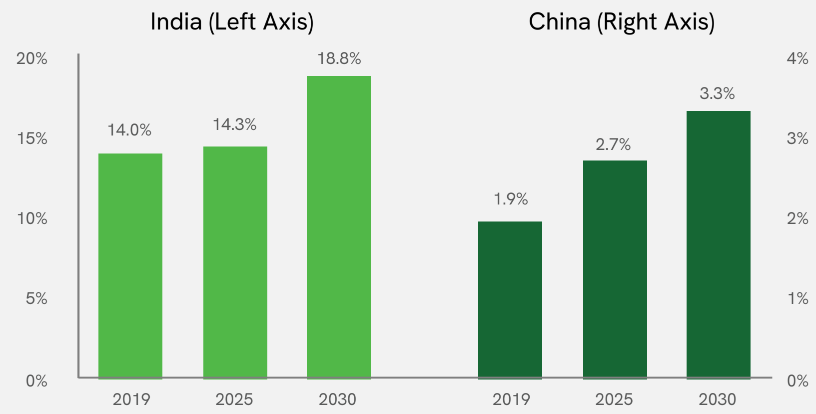
The strong demand to travel to the Middle East among Chinese and Indian leisure visitors reflects both overall robust growth in these markets, and the Middle East gaining share of this demand.

Outbound leisure travel from India is set to increase one-third between 2025 and 2030, in line with the global average. Volumes from China will more than double, partly reflecting catch-up growth from a delayed post-pandemic recovery, and its global share will rebound rather than increase. Growth in outbound leisure travel from India and China will be driven by continued economic development. Over the next decade, each is expected to have more than 20 million new households with sufficient disposable income to travel internationally.

The Middle East will also capture a larger share of the Chinese and Indian leisure market. The region received 14.3% of Indian leisure nights to all global destinations in 2025, broadly on par with 2019. This share is projected to grow to almost 19% by 2030. New capacity will support this growth alongside deepening trade and investment linkages.

The Middle's East share of Chinese leisure travel is much smaller at 2.7% in 2025, but this has increased almost one percentage point since 2019 and will rise to over 3% in the coming five years. As well as being a key driver of growth, Chinese visitors are also high-value. On average, they spend over twice as much per night than the typical visitor to the Middle East. This high outlay is supported by the continued proliferation of luxury travel offerings in the region.

Middle East Leisure Travel from China and India
Share of leisure nights



Source: Tourism Economics 2026

China and India Outbound Leisure Nights to Global Destinations

	Growth 2025-2030	Global Share in 2030
China	111%	6.2%
India	33%	1.7%

Source: Tourism Economics 2026

Source: Tourism Economics 2026

INTERNATIONAL BUSINESS TRAVEL IN THE MIDDLE EAST

Business travel is an important segment for inbound travel to the GCC. Business visitors made up 22% of all arrivals in 2025, well above that for other parts of MENASA. Growth in these arrivals is set to broadly match that in leisure visits, with average growth of more than 8% expected through to 2030. Business visitors also spend more on an average nightly basis, almost double that of inbound leisure visitors, leading to higher economic contributions. The GCC is relatively more prominent as a global market for business travel (accounting for 11% of inbound nights worldwide) than for leisure (4.5%), with further gains expected in coming years.

Business events – meetings, incentive travel, conventions and exhibitions (MICE) – are a key component of business travel and a rapidly growing segment in the Middle East. The latest ICCA data show that attendance at association meetings in the region has nearly doubled over the past decade, while government meetings generate greater economic impact than in any other global region.

The UAE is the largest inbound business destination in the GCC, welcoming more than 10 million arrivals in 2025. Saudi Arabia and Kuwait recorded a similar volume of business visits, though both significantly lower than the UAE. However, Saudi Arabia is expected to see exceptionally strong growth in coming years. Business arrivals to the Kingdom are set to increase over 150% between 2025 and 2030. This is more than three times the size of the next strongest uplift in the region (the UAE) and notably higher than the projected pickup in leisure arrivals. This will be driven

International business travel is more important to the GCC than for the rest of MENASA. Business visits made up 22% of arrivals to the GCC in 2025 and are projected to grow more than 8% annually through to 2030.

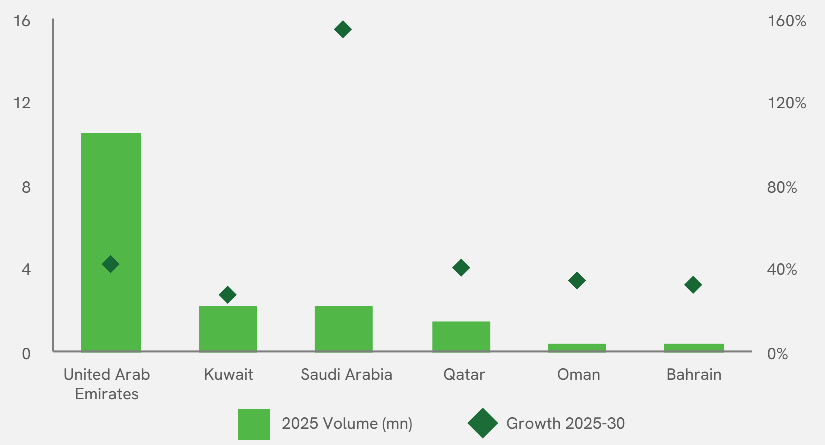
Source: Tourism Economics 2026

Association meeting attendance in the Middle East has nearly doubled over the last 10 years, with almost 130,000 participants in 2025.

Source: ICCA 2026

GCC International Business Visits

2025 volume of nights in millions (left side) and expected growth to 2030 (right side)



Source: Tourism Economics 2026

by significant investment in MICE infrastructure and strengthening of business relationships, through deepening trade and investment relationships, particularly with inter-regional source markets.

While growth since 2019 has been broadly based across source regions, the strong uplift in projected business arrivals will, again, be primarily be driven by longer-haul source markets. Inter-regional business arrivals to the GCC are set to increase 50% between 2025 and 2030, compared to 35% for those from within the Middle East. India is by far the largest inter-regional market, accounting for almost one-quarter of long-haul business arrivals to the GCC in 2025. UK, China, US and Germany were the next largest markets and together accounted for almost a further third of this demand.

Among major markets, China is projected to achieve by far the strongest growth, with a doubling of business arrivals by 2030 and a gain in share anticipated. There will also be impressive growth for several smaller markets. Business arrivals from Pakistan (ranked 7th for inter-regional sources in 2025) are set to increase more than 80% in the next five years, and those from Indonesia (ranked 12th) and Bangladesh (14th) by 90% or more.

Inbound business travel to Saudi Arabia is set to rise 150% by 2030. This is the strongest growth in the GCC, but the UAE will remain the largest market.

Source: Tourism Economics 2026

Top Inter-regional Source Markets for International Business Travel to the GCC

	2025 Business Visits to the GCC	2025 Share of Inter-regional Arrivals	2025-2030 Increase
India	2.4m	23%	54%
United Kingdom	1.1m	11%	44%
China	0.7m	7%	99%
United States	0.6m	6%	39%
Germany	0.5m	5%	35%

Source: Tourism Economics 2026

PROSPECTIVE VISITOR DASHBOARD

Middle East

Those Interested in visiting the Middle East vs. those interested in other destinations

The premium audience, valuing luxury and cultural connection. The most AI-forward group.

WHO ARE THEY?

5pp+ higher / lower than those not interested

46%	36%	52%	76%	47%
vs. 26% ▲ 20pp	vs. 24% ▲ 12pp	vs. 33% ▲ 20pp	vs. 46% ▲ 30pp	vs. 38% ▲ 10pp
Aged under 35	Upper-middle or high income	Able to work remotely	Work trip in last 12 months	Travels as a family group

PREMIUM DEMAND

A premium audience: luxury matters when booking for around three quarters, and spending on luxurious experiences is a key part of how they travel. Premium product is a key acquisition tool.

CULTURAL CONNECTION

Meeting local people is central to appeal, while cultural and religious events pull a meaningful share of those who travel for events. Authentic access, hosted experiences and calendar moments present key hooks.

SHOPPING & PREMIUM PULL

Shopping and premium experiences shape where they choose to go. Retail districts, flagship venues and signature experiences are distinguishing attractions worth leading with.

AI-FORWARD

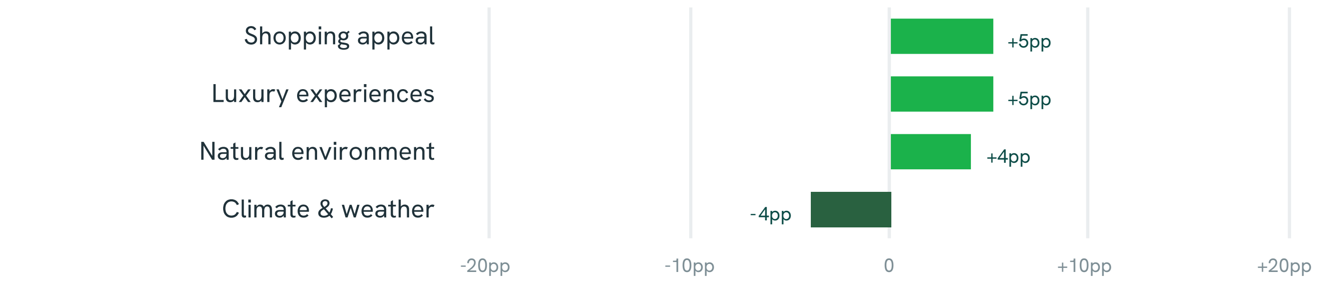
The most AI-engaged of the three audiences: chatbots already feature in trip planning alongside social platforms. Content, rates and availability should be elegible to assistants, not only to search engines.

MOTIVATIONS, BARRIERS & BOOKING BEHAVIOUR

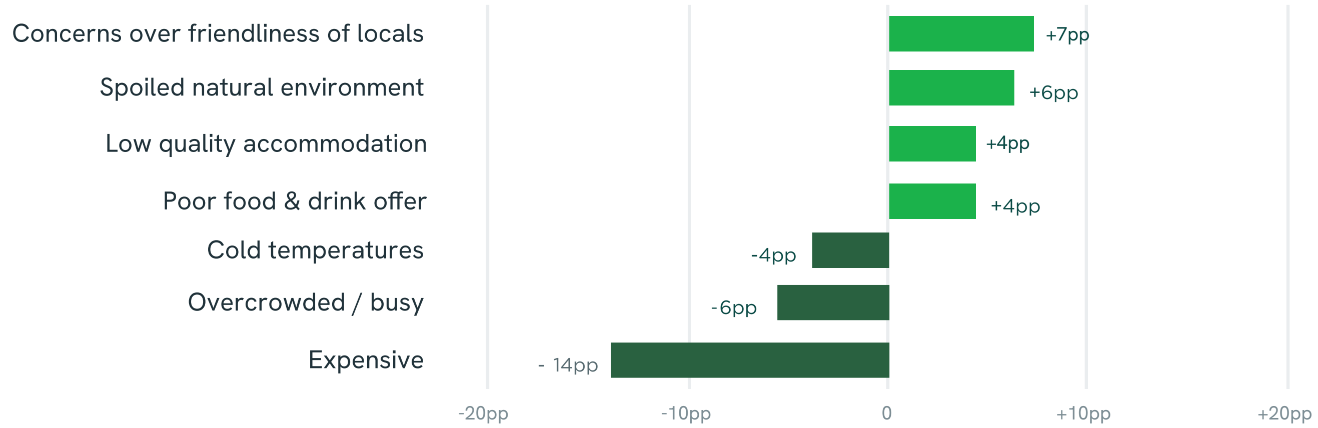
Bars show the percentage point gap between prospective visitors to the Middle East and those interested in other destinations, based on response options mentioned by 10% or more with a gap of at least 3 percentage points.

Over-indexes (cited more)
Under-indexes (cited less)

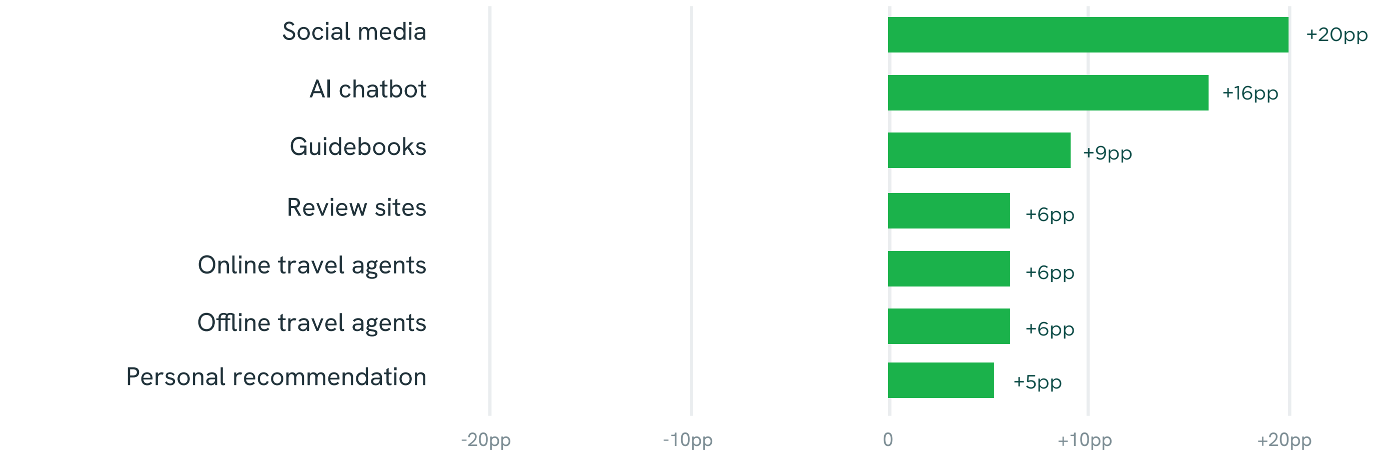
Reasons for choosing last international destination



Deterrents when choosing a destination



Planning channels for last international trip



PROSPECTIVE VISITOR DASHBOARD

North Africa

Those Interested in visiting North Africa vs. those interested in other destinations

Climate and culture at the value end of the market. Established appeal, steady demand and the least digital of the three.

WHO ARE THEY?

5pp+ higher / lower than those not interested

39%	29%	49%	65%	40%
vs. 27% 12pp	vs. 25% 5pp	vs. 33% 16pp	vs. 48% 17pp	vs. 39% 1pp
Aged under 35	Upper-middle or high income	Able to work remotely	Work trip in last 12 months	Travels as a family group

CLIMATE & CULTURE

North Africa offers a well-established and well-understood proposition of warm weather and a deep historical and cultural offer. Motivations to visit the region are stable, favouring consistency over reinvention.

PRICE-AWARE

Cost is the most cited barrier and value for money features in how they choose. Clear inclusions, transparent pricing and shoulder-season value will land better than premium framing.

MID-MARKET PULL

Luxury matters to a smaller share than in the other two sub-regions. Mid-market hotels, characterful independents and well-priced touring product will travel furthest here.

TRADITIONAL CHANNELS

Digital planning is the norm, but traditional routes retain a role: guidebooks and high-street agents remain part of the mix. Trade and offline distribution still require investment.

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MOTIVATIONS, BARRIERS & BOOKING BEHAVIOUR

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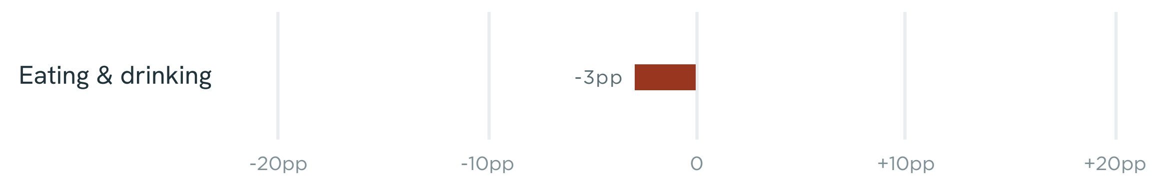
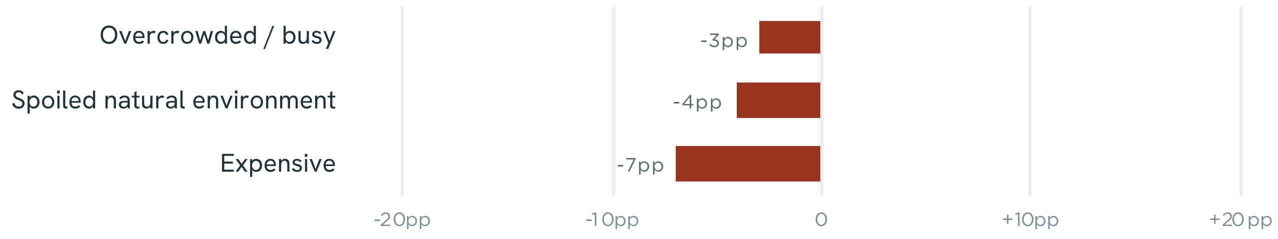
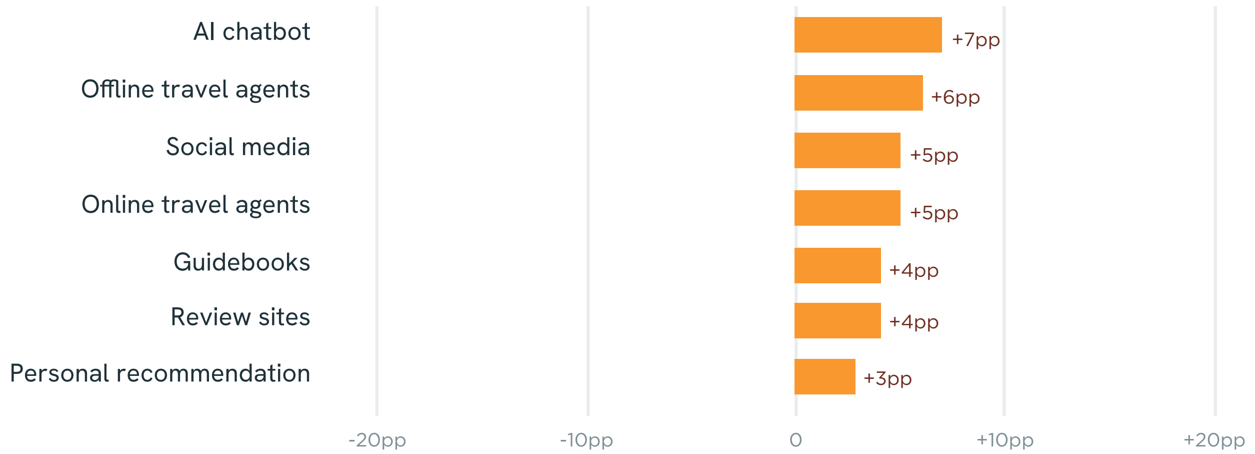


Deterrents when choosing a destination



Planning channels for last international trip



PROSPECTIVE VISITOR DASHBOARD

South Asia

Those Interested in visiting South Asia vs. those interested in other destinations

The youngest and most exploratory audience. Prioritising new destinations, longer trips, family and food, while on a budget.

WHO ARE THEY?

5pp+ higher / lower than those not interested

47%	31%	48%	65%	45%
vs. 25% 22pp	vs. 24% 7pp	vs. 33% 15pp	vs. 47% 18pp	vs. 38% 7pp
Aged under 35	Upper-middle or high income	Able to work remotely	Work trip in last 12 months	Travels as a family group

YOUNGEST AUDIENCE

The youngest of the three audiences and highly mobile, with a large share able to work remotely and travelling for work through the year. Long, flexible and multi-stop itineraries suit how they travel.

FAMILY & FOOD

Food and family shape the choice of destination: eating and drinking is their stand-out reason, with family-friendly places close behind. Culinary trails and multi-generational product land best.

VALUE-CONSCIOUS

Cost is the most cited barrier, so transparent pricing and clear inclusions matter. Value framing rather than premium framing opens the conversation with this audience.

AI ON PRICE

AI is part of how they find value: among those using it, a majority rate it very influential for finding deals, and it sits alongside social platforms in planning. Rate visibility on these platforms is important.

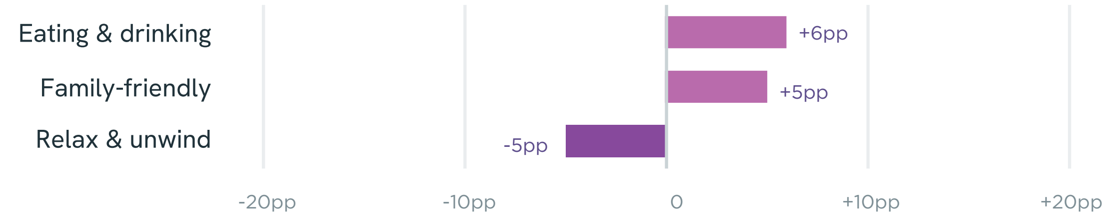
MOTIVATIONS, BARRIERS & BOOKING BEHAVIOUR

Bars show the percentage point gap between prospective visitors to the Middle East and those interested in other destinations, based on response options mentioned by 10% or more with a gap of at least 3 percentage points.

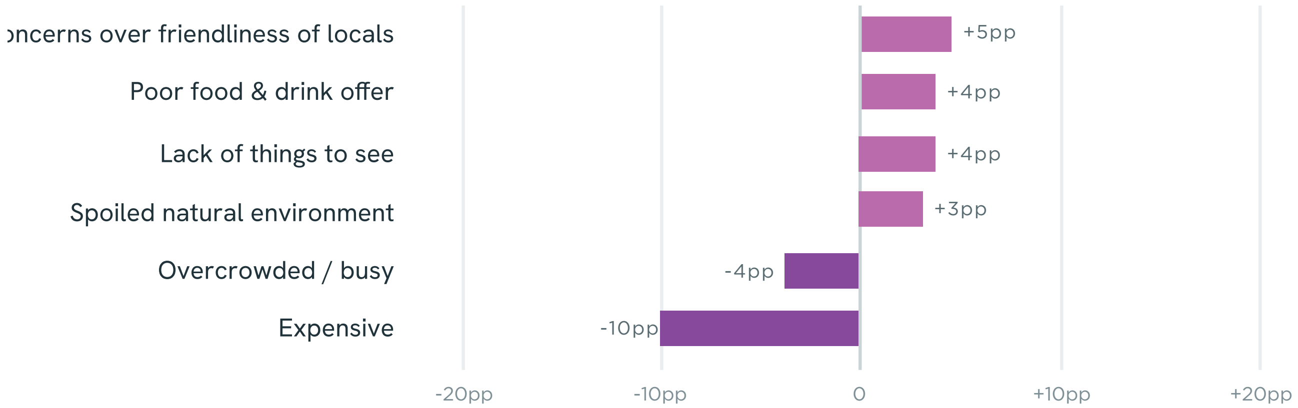
Over-indexes (cited more)

Under-indexes (cited less)

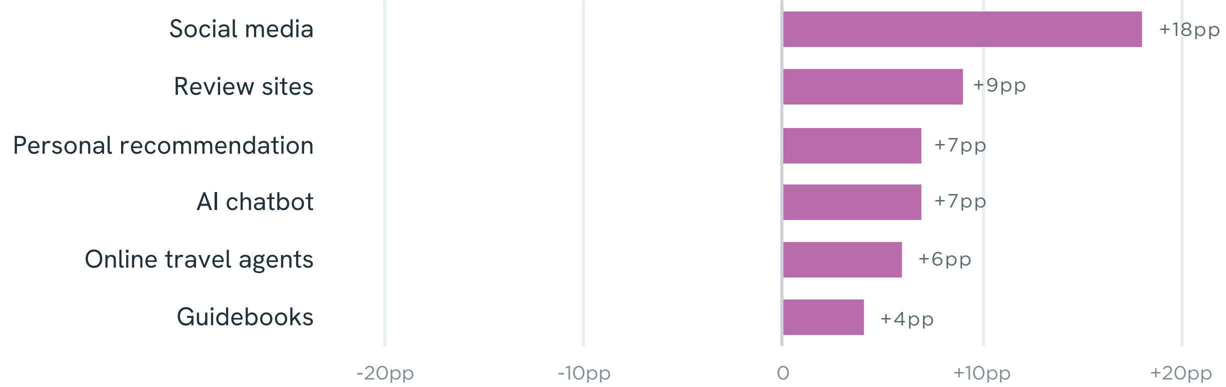
Reasons for choosing their last international destination



Deterrents when choosing a destination



Planning channels for last international trip



KEY THEMES BY SUB-REGION

Investment and connectivity are reshaping inbound travel across MENASA, with distinct tourism themes evident in each sub-region. The Middle East is well-positioned to capture premium demand and adopt new technologies, while North Africa benefits from its established cultural and climate offering, and South Asia appeals to travellers seeking new experiences and value.

Events and experiences are a differentiator for Middle East and South Asia

MENASA's cultural depth gives the region a natural advantage as travel increasingly orientates towards demand for passion-led travel. GetYourGuide's Hidden Trends List 2026 records rising demand for trips built around specific interests, including sunrise balloon flights over Marrakech, with morning tour bookings up 44% year on year. Sun, sea and sand holidays are also diversifying on the same logic; a survey of 3,000 US travellers by Priceline, the US online travel agency, found 74% want a beach holiday to offer more than relaxation alone. The active and adventure offerings developing across the region are well positioned to meet this growing segment.

For an audience increasingly seeking unique experiences, events offer a distinctive regional draw. Tourism Economics data reveals that prospective visitors to the Middle East and South Asia are around 50% more likely to report growing interest in event-related travel than other travellers. Religious events (22% of prospective Middle East visitors, compared with 13% among those interested in other destinations) and cultural events (55% vs. 42%) are the clearest differentiators for the Middle East.

Travellers considering the Middle East (46%) and South Asia (44%) are more likely to report growing interest in event-led travel than those looking elsewhere.

Source: Tourism Economics 2025

Source: DCT Abu Dhabi 2026

Abu Dhabi demonstrates clear commercial returns for leisure event travel, with the Department of Culture and Tourism reporting culture and leisure event attendance reached 4.2 million in 2025, up 20% on 2024, while hotel revenues rose 19.5% over the same period to AED 9.1 billion, against a record 26.6 million visitors.

Doha is developing capabilities to achieve comparable success as a host of cultural and leisure events, supported by its designation as the GCC Tourism Capital for 2026. It is hosting a cultural programme featuring Art Basel's Middle East debut in February and the launch of Qatar Museums' Rubaiya Qatar contemporary art quadrennial in November.

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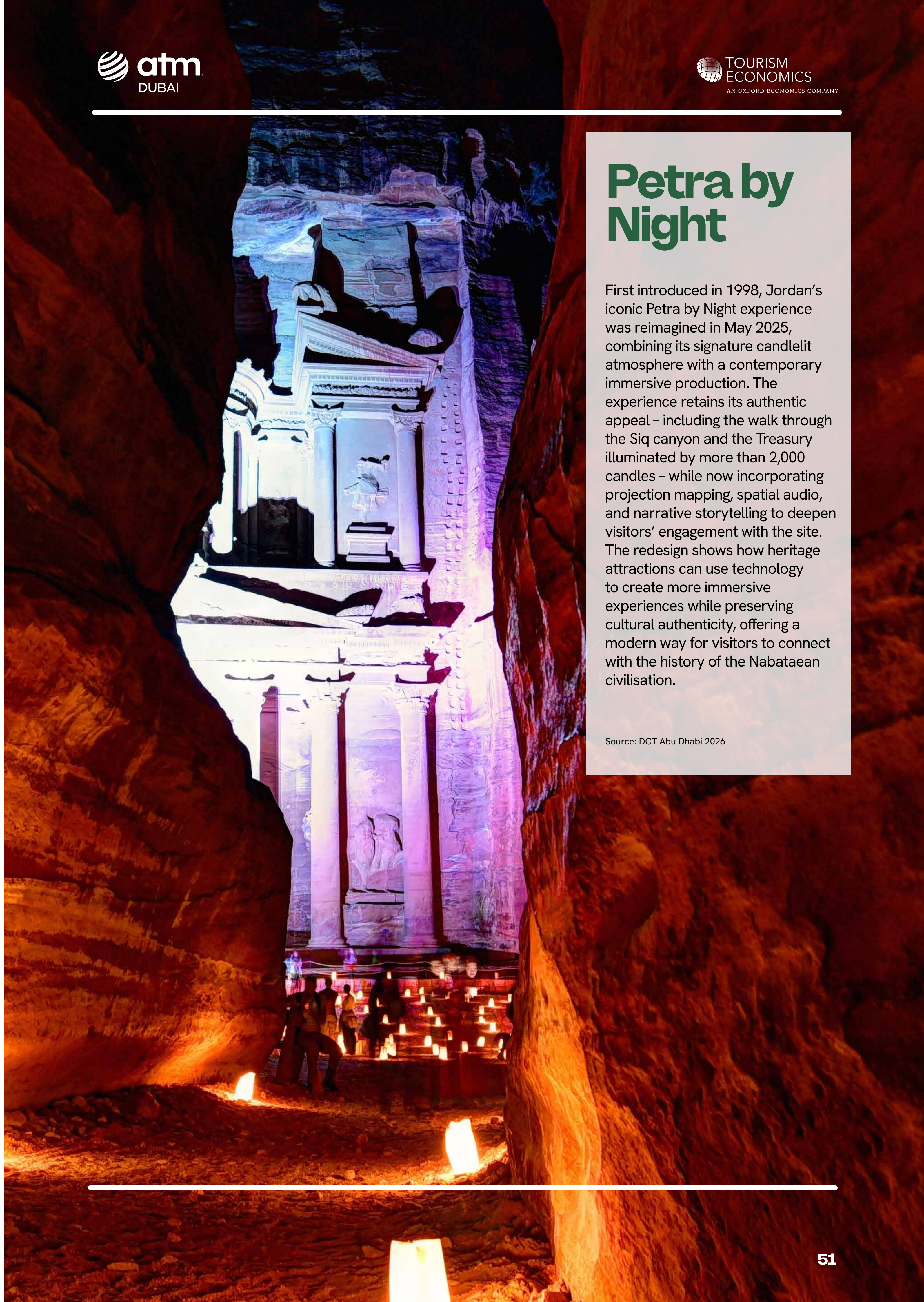


Petra by Night

First introduced in 1998, Jordan's iconic Petra by Night experience was reimagined in May 2025, combining its signature candlelit atmosphere with a contemporary immersive production. The experience retains its authentic appeal – including the walk through the Siq canyon and the Treasury illuminated by more than 2,000 candles – while now incorporating projection mapping, spatial audio, and narrative storytelling to deepen visitors' engagement with the site. The redesign shows how heritage attractions can use technology to create more immersive experiences while preserving cultural authenticity, offering a modern way for visitors to connect with the history of the Nabataean civilisation.

Source: DCT Abu Dhabi 2026

Abu Dhabi Grand Prix 2025

The 2025 Abu Dhabi Grand Prix, staged at Yas Marina Circuit from 4th to 7th December, attracted a record 339,000 attendees across Yas Island, according to event organiser, Ethara. Of these, 203,000 attended the circuit, 6% more than 2024, while a record 136,000 attended four nights of Yasalam festival after-race concerts and after-parties. Held during the region's established October-to-March high season, the race deepens peak demand through multi-night programming that extends stays and increases visitor spending.

Source: Dubai Eye 2025; Timeout 2025

With most regional programming concentrated between October and March, the clearest opportunity for event related travel is by extending selected events into summer months. Dubai offers an established model with Dubai Summer Surprises, now in its 29th edition, running from July to August with 60 days of retail, dining and indoor entertainment, anchored by air-conditioned venues including Modesh World at Dubai World Trade Centre and the Beat The Heat DXB concert series. Visit Qatar has launched the Hala Summer programme in 2026 with a series of events tailored for the summer months, including more flexible booking conditions. Saudi Arabia has demonstrated the same principle through the Esports World Cup, staged in Riyadh across July and August in 2024 and 2025, with Riyadh expected to host again in 2027.

Africa Cup of Nations 2025

Hosted by Morocco from December 2025 to January 2026, the 2025 Africa Cup of Nations brought 24 teams to nine stadiums across six cities, following extensive investment in sporting and visitor infrastructure. The Confederation of African Football (CAF) described it as the competition's most commercially successful edition, while official figures attributed around 600,000 international visitors to the tournament, helping Morocco approach a record 20 million arrivals for the year. Staged during the traditionally quieter winter period, AFCON demonstrated how major events can bolster off-peak demand while creating an infrastructure legacy for Morocco's co-hosting of the 2030 FIFA World Cup.

Source: Morocco World News 2026

Premium services at the heart of Middle East hospitality

Luxury executives view the Middle East as a key industry growth engine. The latest consumer data from Tourism Economics reveals that three quarters (77%) of those interested in visiting the Middle East prioritise luxury when booking a trip, compared with only half (51%) of those interested in visiting alternative destinations. Three in five (61%) of those interested in the Middle East report they are likely to spend on luxury during leisure travel, highlighting their high-value potential for the region. Deloitte's Global Powers of Luxury 2026, based on a survey of 420 senior executives, ranks the region third among the markets expected to drive growth in 2026. Luxury travel also offers the greatest potential across industry segments, cited by 36% of respondents.

Competition at the top of Dubai's hotel market is intensifying. Luxury hotel occupancy grew at an above rate of 4.5% in 2025, according to Cavendish Maxwell's Dubai Hospitality Market Performance 2025, which draws on CoStar data. With around 4,600 rooms due to open in 2026, almost 90% in the higher-class segments, the consultancy forecasts city-wide ADR growth moderating to 1.6%.

Meanwhile, Knight Frank's Saudi Arabia Hospitality & Religious Tourism Report 2026, again based on CoStar data, reported that hotel occupancy averaged around 63% between January and April 2026. Performance remained resilient as new luxury properties such as SLS The Red Sea entered the market, and as the premium hotel pipeline continued to expand linked to giga-project development.

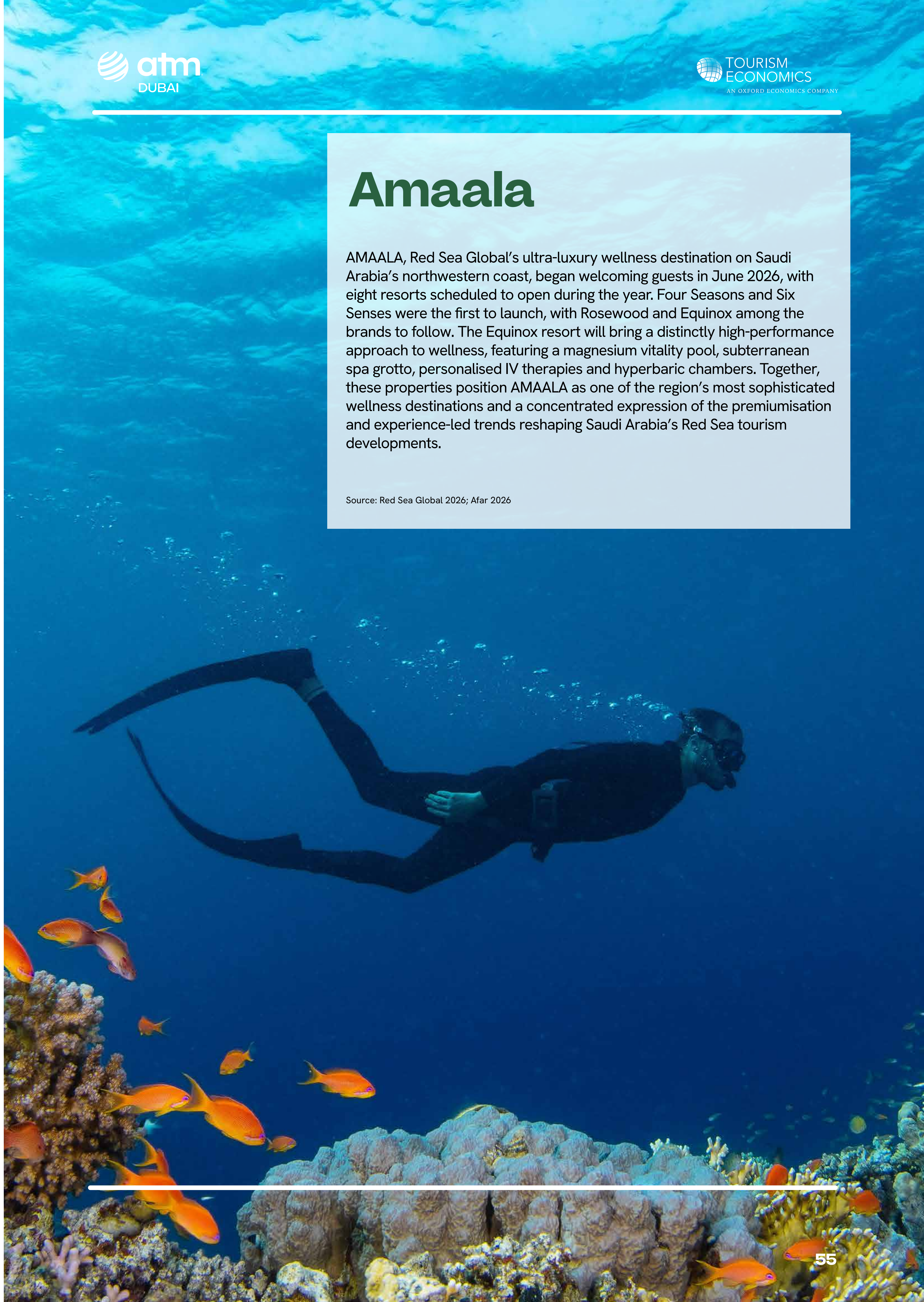
As new supply concentrates at the top end, hotels have more to gain from competing on facilities and experience, exemplified by expanding wellness offerings. Following a survey of more than 10,000 travellers across 10 markets, Simon-Kucher reports that the highest shares of travellers taking a wellness trip in 2025 were from India (49%), the UAE (39%) and Saudi Arabia (34%). Interest skews sharply by income; 58% of high-income travellers are planning a wellness holiday in 2026, more than twice as likely as lower-income travellers (26%).

77%
of travellers interested in visiting the Middle East prioritise luxury when booking, against
51%
of those considering other destinations.

Source: Tourism Economics 2025

Outbound travellers from India, the UAE and Saudi Arabia show particularly strong interest in wellness travel.

Source: Simon-Kucher 2025



Amaala

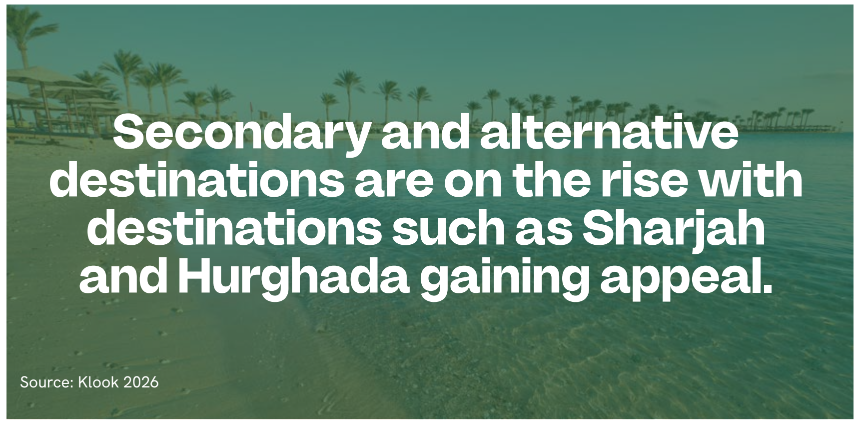
AMAALA, Red Sea Global's ultra-luxury wellness destination on Saudi Arabia's northwestern coast, began welcoming guests in June 2026, with eight resorts scheduled to open during the year. Four Seasons and Six Senses were the first to launch, with Rosewood and Equinox among the brands to follow. The Equinox resort will bring a distinctly high-performance approach to wellness, featuring a magnesium vitality pool, subterranean spa grotto, personalised IV therapies and hyperbaric chambers. Together, these properties position AMAALA as one of the region's most sophisticated wellness destinations and a concentrated expression of the premiumisation and experience-led trends reshaping Saudi Arabia's Red Sea tourism developments.

Source: Red Sea Global 2026; Afar 2026

Value-hunting driving demand for secondary destinations

Three in five travellers considering South Asia report greater interest in affordable destinations than two years ago, while demand in the Middle East continues to skew towards luxury.

Source: Tourism Economics 2025



Secondary and alternative destinations are on the rise with destinations such as Sharjah and Hurghada gaining appeal.

Source: Klook 2026

Emirates' $5 billion cabin retrofit will cover 219 widebody aircraft, with 100 completed by July 2026.

Source: Emirates 2026

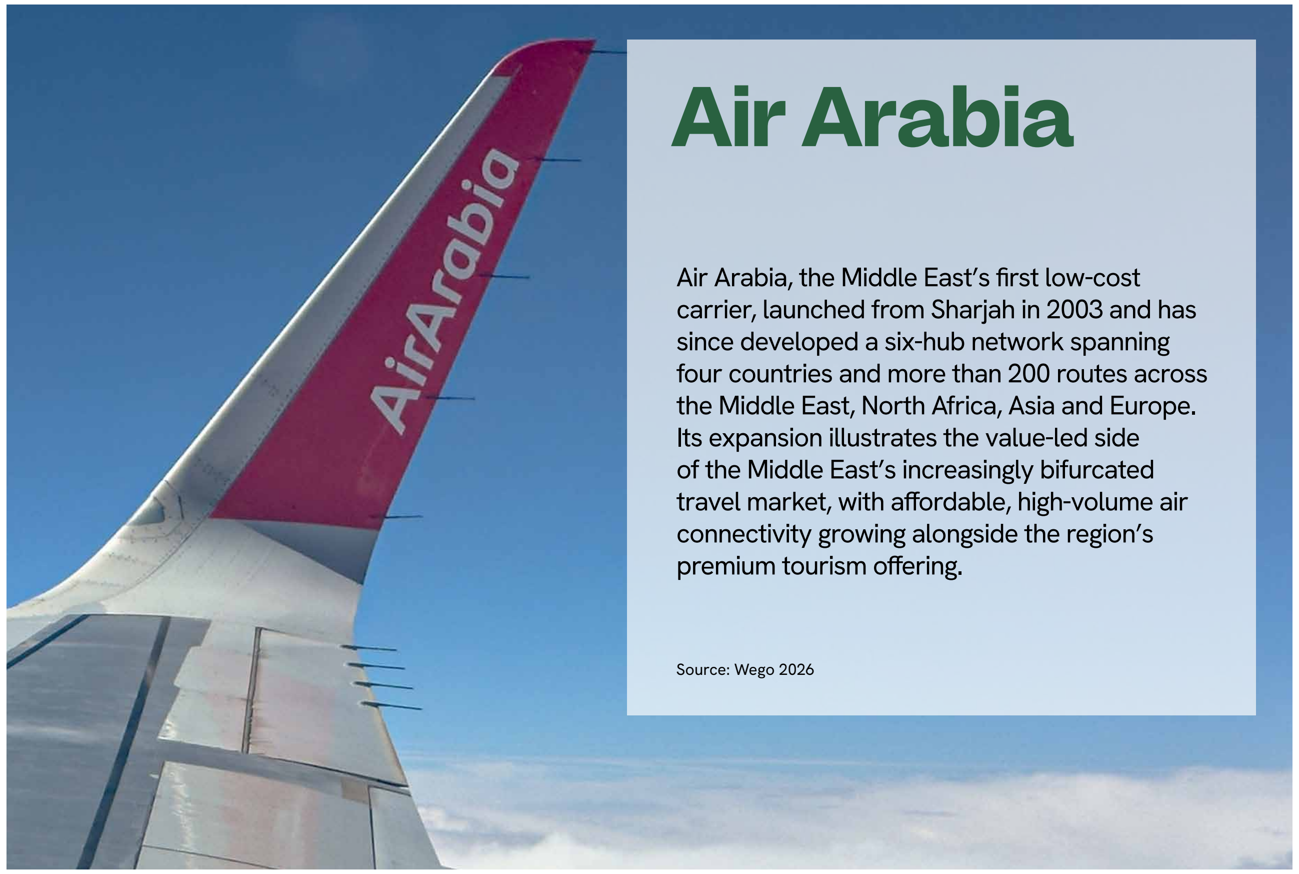
Value-consciousness varies significantly among those interested in different MENASA sub-regions, offering opportunities for different destinations to benefit from rising price sensitivity. Tourism Economics research finds that prospective visitors to South Asia are the most price-focused, with three in five (59%) reporting increased interest in affordable destinations compared with two years ago, while those interested in visiting the Middle East continue to favour more luxury offerings.

As expectations shift, travellers are looking beyond costly flagship destinations. North African cities, GCC secondary destinations and Indian Tier 2 and 3 markets are well placed to capture experience-led spillover from more established hubs. Activities and experiences marketplace Klook surveyed 11,000 Millennial and Gen Z travellers across 20 markets, identifying Sharjah and Hurghada as emerging destinations gaining traction among younger travellers seeking distinctive experiences beyond familiar hotspots.

The opportunity to serve to value-conscious travellers is particularly strong in North Africa: 27% of prospective visitors report greater interest in hostels than two years ago, versus 17% among those considering other regions.

Air travel trends are reinforcing the divide between premiumisation and value-hunting. Aviation data provider OAG ranked Cairo-Jeddah as the world's second-busiest international route in 2025, with 5.8 million scheduled seats. This scale reflects the expansion of low-cost carrier links between Egypt and Saudi Arabia: Egypt accounts for 96% of flyadeal's African capacity and 81% of flynas's. At the other end of the market, Gulf carriers are investing heavily in premium cabins. Emirates' $5 billion programme will retrofit 219 widebody aircraft. By July 2026, it had refurbished 100 and installed more than 3,800 Premium Economy seats.

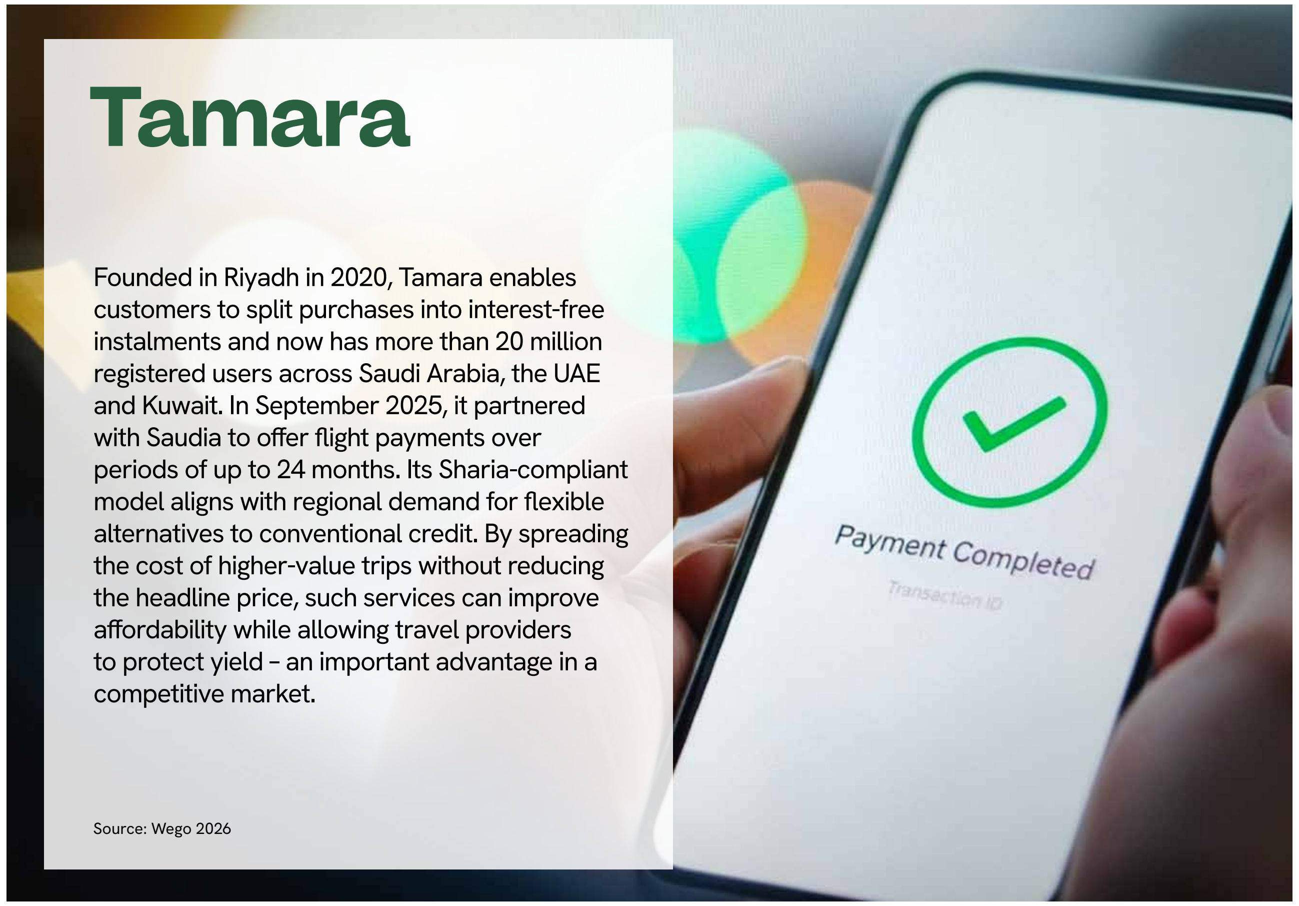
Capacity is expanding across both value and premium segments, widening consumer choice. At the same time, travel professionals report particularly strong competitive pressure in the GCC: a RateHawk survey of 1,300 travel professionals, published in partnership with PhocusWire, found that half (49%) of GCC respondents cited high competition as their dominant challenge, compared with a quarter (26%) globally. In this fast-growing market, destinations must increasingly differentiate their offerings and demonstrate clear value at all price levels.



Air Arabia

Air Arabia, the Middle East's first low-cost carrier, launched from Sharjah in 2003 and has since developed a six-hub network spanning four countries and more than 200 routes across the Middle East, North Africa, Asia and Europe. Its expansion illustrates the value-led side of the Middle East's increasingly bifurcated travel market, with affordable, high-volume air connectivity growing alongside the region's premium tourism offering.

Source: Wego 2026



Tamara

Founded in Riyadh in 2020, Tamara enables customers to split purchases into interest-free instalments and now has more than 20 million registered users across Saudi Arabia, the UAE and Kuwait. In September 2025, it partnered with Saudia to offer flight payments over periods of up to 24 months. Its Sharia-compliant model aligns with regional demand for flexible alternatives to conventional credit. By spreading the cost of higher-value trips without reducing the headline price, such services can improve affordability while allowing travel providers to protect yield – an important advantage in a competitive market.

Source: Wego 2026

Rapid adoption of travel technology in the Middle East

MENASA is the global frontier for AI-led travel discovery as rapid growth and new investment is coupled with a willingness to leapfrog legacy systems. In a survey of C-suite and senior leaders across Middle East-based hotel groups, investors, travel providers and government entities, PwC found 91% already piloting or using AI in their operations. 85% respondents reported measurable cost savings from the new technology.

The region also attracts a highly AI-engaged inbound audience: Tourism Economics consumer survey data show that prospective visitors to the Middle East are more than twice as likely to have used an AI chatbot for trip planning as travellers considering other regions (28% versus 12%). Social platforms compound this AI-effect, highlighted as a key source of inspiration by 70% of younger travellers in India and 65% in the UAE, according to Simon-Kucher.

Converting inspiration into bookings requires seamless infrastructure that carries travellers from discovery to transaction and overcomes the risk of fragmentation. Phocuswright identifies interoperability as a core enabler of agentic AI commerce, where systems transact on a traveller's behalf rather than simply informing them. Doha shows what that looks like in practice: Hamad International Airport, Qatar Airways and air transport technology provider SITA launched Fast Pass in July 2026, a system connecting more than 700 biometric touchpoints across airline and airport platforms so that enrolled passengers on eligible Qatar Airways departures can check in, drop bags, clear security and board using facial recognition.

91% of Middle East travel companies are piloting or using AI tools and 85% have achieved measurable cost savings.

Source: PwC 2025

Travellers considering the Middle East are more than twice as likely to have used an AI chatbot to plan a trip (28%), compared with those considering over regions (12%).

Source: Tourism Economics 2025

However, the extent to which AI operations are visible to consumers varies by sub-region. In the Middle East, luxury properties are keeping automation behind the scenes to protect human service as a differentiator. Where high room rates are justified by anticipatory personal attention, guest-facing automation risks undercutting that premium service. In these cases, AI is more widely adopted upstream in revenue management and operations.

India's large midscale and economy segment inverts that logic with AI tools more visible to guests. Hospitality consultancy Horwath HTL, drawing on CoStar performance data in its India Hotel Market Review 2025, puts the midscale and economy average daily rate at ₹4,049 (around $40) against a national average of ₹8,624 (around $90), with supply and demand both growing faster than any other tier. Thin margins make labour cost a primary constraint, and the value proposition rests on price rather than personal service, hence visible automation involves minimal trade-off. Overall, PwC finds that regional leaders overwhelmingly expect AI to shift human roles toward higher-value work rather than replace it entirely. A human touch continues to hold its value across all MENASA markets, with trusted advisors and culturally-fluent service valued highly by consumers.

IndiGo's "6Eskai" chatbot

IndiGo's customer-facing AI assistant, 6Eskai, shows how automation can strengthen frontline service. The assistant handles customer queries and supports tasks including booking, check-in, refunds and seat selection. It is successfully resolving 96% of customer interactions without human intervention in 2026 to date. With WhatsApp now IndiGo's primary customer communication channel, 6Eskai sits within a channel widely used by Indian travellers, while conversational responses and humour continue to create more personable experiences.

Source: Wego 2026

In July 2026, Qatar's Hamad International Airport and Qatar Airways launched Fast Pass, using biometric technology to provide passengers with a faster, more seamless airport experience.

Source: SITA 2026

Sustainable development as a revenue generator and a core requirement

Sustainability plays a unique commercial role in MENASA. Consumer data from Tourism Economics reveals that prospective visitors to the region are more willing to pay to mitigate their air travel impact through offsetting (50% versus 32%) or choosing environmentally friendly airlines (56% versus 36%). The relative affluence of this audience and willingness to pay, makes environmental provision a revenue opportunity for the region rather than a cost of entry. This rewards specific, credible sustainability commitments attached to premium options.

Sustainability is shifting from a voluntary differentiator to a regulatory requirement, with the UAE at the forefront. Its federal climate law, effective since May 2025, covers emissions sources across the country and requires designated entities to measure, report and reduce greenhouse-gas emissions, with fines reaching AED 2 million. These obligations are particularly relevant as the hospitality sector expands, with 105 hotel projects in the United Arab Emirate's development pipeline in Q1 2026, according to Lodging Econometrics. This presents an opportunity to embed lower-carbon standards and reporting systems at the design stage rather than retrofit them later.

State investment is also shaping underlying sustainability offerings. Saudi Arabia Railways carried a record 14 million passengers in 2025, according to the Saudi Press Agency, while its freight operations removed two million truck journeys and avoided 364,000 tonnes of carbon emissions. In the UAE, Etihad Rail launched passenger services between Abu Dhabi and Fujairah in June 2026, while Dubai has recently approved the AED34 billion ($9bn) Metro Gold Line, which will integrate with the national rail network. As these systems expand, they will reduce the carbon intensity of travel within cities as well as improving the service. Car-free, multi-city itineraries will become increasingly viable to strengthen the region's visitor proposition as well as its environmental credentials.

56%
of prospective MENASA visitors would pay to fly with a more environmentally friendly airline, compared with 36% of travellers considering other regions.

Source: Tourism Economics 2025

Aviation shows both the scale of the opportunity and its limits. Sustainable aviation fuel (SAF) cost more than double the price of conventional jet fuel in 2025 The UAE is building supply against that gap but ambitions for SAF adoption remain modest. Oxford Economics finds that softening demand is limiting how far carriers can raise fares across the board, so the opportunity lies in specific provision priced to travellers already willing to pay for it.

Jubail Mangrove Park, Abu Dhabi

Jubail Mangrove Park is a conservation initiative led by the UAE government in partnership with the Environment Agency – Abu Dhabi. The project transforms a protected 480-hectare mangrove sanctuary into a thoughtfully managed visitor attraction, featuring a guided boardwalk through the mangrove forest as well as scenic boat and kayak tours integrated directly into the reserve. More than 600,000 mangrove trees have already been planted, advancing the UAE's national objective of cultivating one million mangroves by 2030. The park capitalises on growing demand for nature-based tourism, offering visitors distinctive and educational experiences while contributing meaningfully to broader sustainability initiatives.

Source: Jubail Mangrove Park 2026

5. Outbound Travel

OUTBOUND TRAVEL ACTIVITY

MENASA countries operate a large travel surplus on average as inbound travel is around 1.5 times larger than outbound. However, outbound travel is a crucial part of the industry, to both destinations within and outside the region. These outbound trips generate significant economic activity for local travel agencies, tour operators, airlines and other businesses, as well as for global destinations.

MENASA has gained prominence as a global outbound market

Outbound travel from MENASA countries grew faster than the global average in recent years, boosting the region's importance as a source market for international travel. Visits from MENASA residents to global destinations, including those within the region, increased 24% between 2019 and 2025, representing average annual growth of 3.6%. This was well above the worldwide total increase of 5% over the same period, and even faster than the 22% growth in inbound travel to the region. MENASA has consequently gained share of the global outbound market in recent years, rising from 7.2% of all visits in 2019 to 8.5% in 2025.

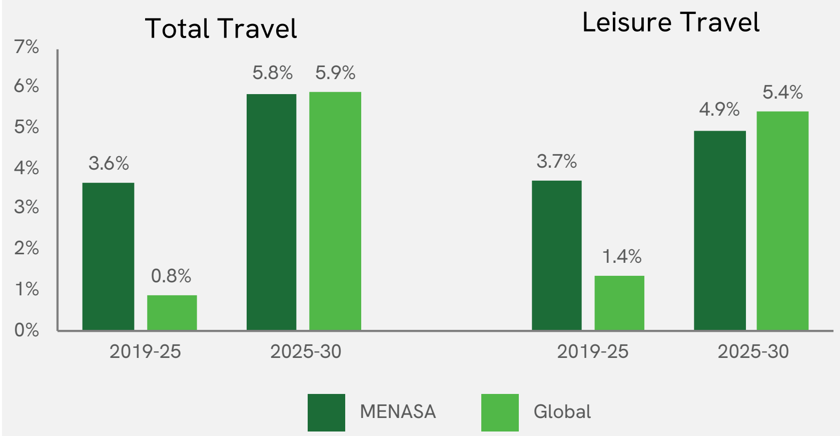
Leisure travel is an important component which grew at a comparable rate to all trips, outperforming the global average. MENASA's share of global leisure travel rose from 6.3% to 7.2% between 2019 and 2025. Gains were also made for outbound business and other travel, illustrating a broader trend of accelerating travel activity among residents of the region.

MENASA outbound travel has grown quicker than the global average in recent years.

Source: Tourism Economics 2026

Outbound Travel Growth

Growth in outbound visits (CAGR) by segment



Source: Tourism Economics 2026

MENASA's Share of Global Outbound Visits

	All Outbound	Leisure	Business	Other
2019	7.2%	6.3%	8.5%	8.4%
2025	8.5%	7.2%	10.5%	10.2%
2030	8.4%	7.1%	10.4%	10.4%

Source: Tourism Economics 2026

GCC leisure travel is a key driver, but demand is widespread

There were 131 million overnight outbound visits by MENASA residents to all destinations in 2025. These visitors stayed over 1 billion nights in all forms of accommodation, spending $169 billion. Further growth is coming, with outbound visits set to increase by around 6% annually between 2025 and 2030, leading to a total uplift of almost one-third.

Leisure tourism accounts for just over half of all outbound visits from MENASA countries, but only 37% of nights travelled on these trips. Other purpose travel, which includes visiting friends and relatives and religious tourism, is the largest component of outbound nights from MENASA. This reflects a much longer average length of stay (ALOS) than business or leisure trips, but much of this segment involves intra-regional travel and is less valuable to longer-haul destinations.

Leisure travel is also the largest segment for outbound visits from each MENASA subregion, accounting for two-thirds from North Africa, slightly over half for the GCC and Middle East, and around 45% for South Asia. However, consistent with the broader MENASA trend, travel for other purposes accounts for the largest share of outbound nights in each sub-region.

2025 Outbound Travel from MENASA

Visits: 131m

Nights: 1bn

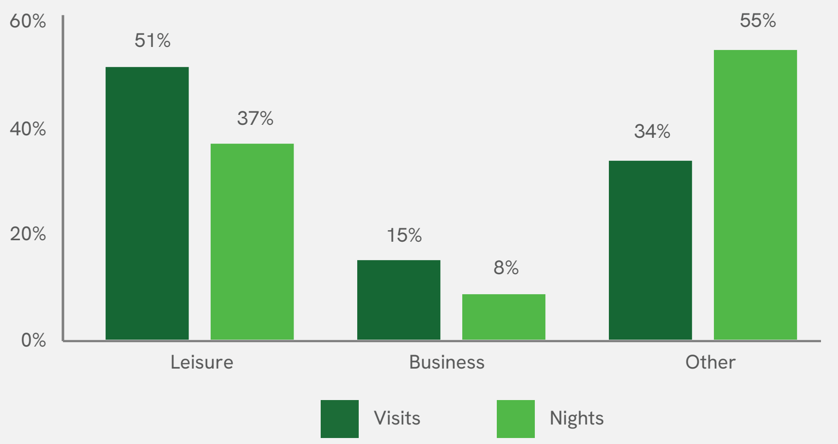
Spending: $169bn

Source: Tourism Economics 2026

Outbound visits from MENASA countries are expected to increase one-third between 2025 and 2030, representing annual growth of 6%.

Source: Tourism Economics 2026

2025 MENASA Outbound Travel Composition
Share of total outbound visits and nights by segment



Note: Figures may not sum to 100% due to rounding
Source: Tourism Economics 2026

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The Middle East, including the GCC, was the source of 80 million outbound visits to global destinations, as well as almost 600 million nights in paid accommodation and $115 billion in spending. In terms of nights, the Middle East made up 57% of MENASA outbound tourism.

The GCC and South Asia each generated around 320 million outbound visitor nights in 2025 (31% of the MENASA total each). However, the GCC is a larger market for outbound leisure travel, making up 35% of the MENASA aggregate, compared to 24% for South Asia. The large volume of outbound travel for other purposes among South Asians, one-third of the MENASA total, is partly driven by the large overseas diaspora, driving travel to visit friends and relatives.

Leisure accounts for the largest share of outbound visits from MENASA, while other purpose travel accounts for more nights due to a longer average length of stay.

Source: Tourism Economics 2026

2025 Outbound Travel Volumes

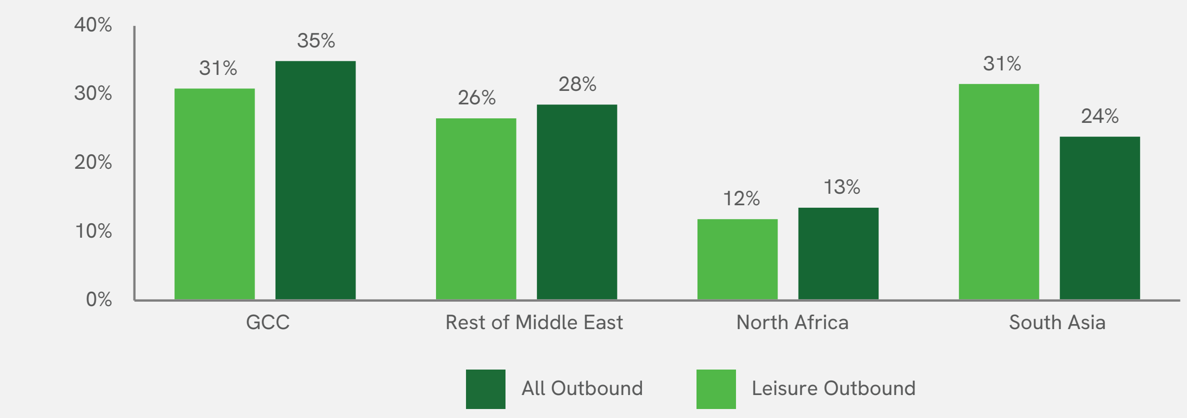
	Visits	Nights	Spend
Middle East	80m	595m	$115bn
GCC	35m	320m	$56bn
North Africa	13m	122m	$8bn
South Asia	38m	325m	$46bn

Source: Tourism Economics 2026

Reflecting a high propensity for leisure travel, the GCC accounted for 35% of MENASA's outbound leisure nights in 2025.

Source: Tourism Economics 2026

2025 MENASA Outbound Travel Composition
Share of outbound nights by segment and sub-region



Note: Figures may not sum to 100% due to rounding
Source: Tourism Economics 2026

GCC has driven outbound growth

The GCC has been the key driver of the growth in outbound visits from MENASA countries. Visits from the GCC increased 65% between 2019 and 2025, reflecting average annual growth of almost 9%. This was notably higher than the other sub-regions, which all recorded average growth of less than 2.5%.

Within-GCC travel grew particularly strongly, rising 87% between 2019 and 2025, compared with 39% for travel to destinations outside the GCC, which has driven the broader uplift in outbound travel across MENASA. Growth was particularly strong from Bahrain and Saudi Arabia, including travel between the two countries. Short-haul travel rebounded following the pandemic as the region reopened earlier than elsewhere, while destination development, particularly in Saudi Arabia, has helped sustain this shift in demand.

The rapid growth in GCC short-haul travel meant that the intra-regional share of outbound travel within the Middle East also increased notably between 2019 and 2025, from 61% to 65%. The increase was even more marked for the GCC itself, rising from 53% to 60%.

Conversely, in North Africa inter-regional outbound visits grew much more quickly than those to destinations within the region, driven by travel to the Middle East, particularly Saudi Arabia, and Western Europe. This saw the intra-regional share of outbound travel for North Africa fall from 53% to 47% between 2019 and 2025. A similar trend occurred in South Asia, though to a lesser extent than in North Africa, with inter-regional destinations remaining dominant among outbound travel, making up almost 90% of visits.

Outbound visits from GCC countries to elsewhere in the bloc grew particularly strongly, rising

87%

between 2019 and 2025.

Source: Tourism Economics 2026

Intra-regional Share of Outbound Visits

	2019	2025	2030
Middle East	61%	65%	65%
GCC	53%	60%	60%
North Africa	53%	47%	43%
South Asia	12%	11%	11%
Global	78%	78%	77%

Source: Tourism Economics 2026

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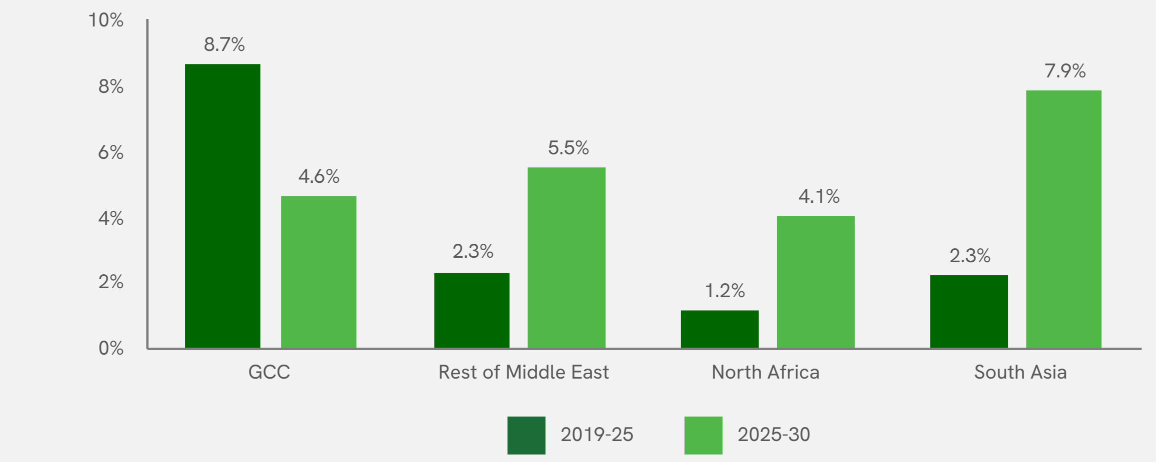
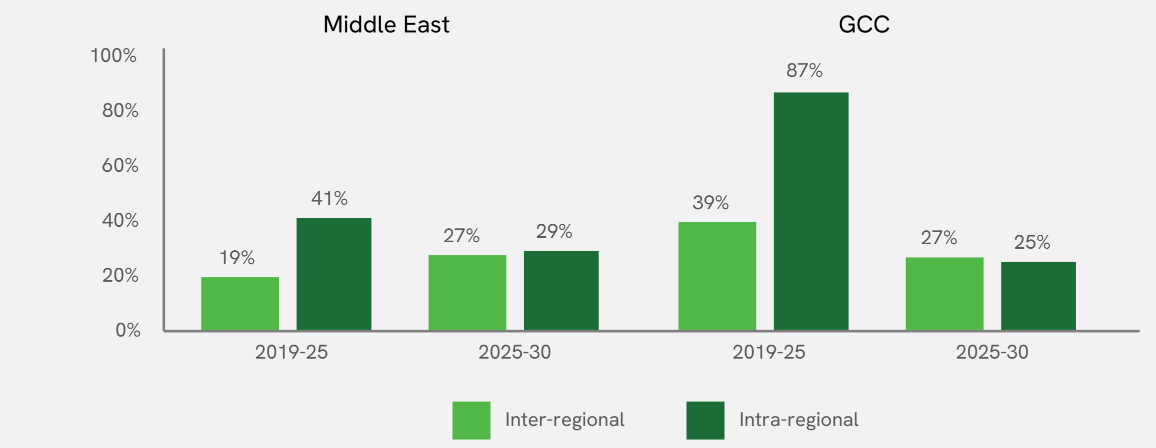
Outbound Travel Growth
Growth in outbound visits (CAGR)



Source: Tourism Economics 2026

Outbound Travel Growth
Growth in inter-regional and intra-regional outbound visits



Source: Tourism Economics 2026

MENASA to maintain global share of demand

Outbound growth from MENASA is expected to continue but will moderate to align with global growth. This partly reflects slower growth from the GCC compared to recent years, where outbound visits are set to increase 4.6% annually between 2025 and 2030, compared with 5.5% for the Middle East and 7.9% for South Asia. As a result, MENASA is expected to maintain, rather than gain, share of global outbound visits for leisure and for all purposes.

Among GCC residents, intra-regional growth will slow the most, but from a high existing rate, to match, rather than exceed, travel to other regions. Intra-GCC visits are projected to increase 25% between 2025 and 2030, only slightly less than that for longer haul trips from the GCC and outbound travel of all distances from the wider Middle East.

Intra-regional travel will remain more prominent than travel to other regions in both the GCC and MENASA, with its share of outbound travel broadly maintained through 2030 at 60% and 65%, respectively. However, there is an upside risk to this given the ongoing destination developments in the GCC and elsewhere in MENASA, which could boost intra-regional volumes and further raise these shares.

MENASA is expected to maintain its share of global outbound demand as regional growth moderates to align with worldwide trends.

Source: Tourism Economics 2026

Largest outbound leisure markets have varying growth outlooks

The growth outlook varies significantly across MENASA's prominent outbound leisure markets. This is best exemplified by the two largest: India and Saudi Arabia. Outbound leisure visits from India to global destinations are projected to increase 44% between 2025 and 2030, which is among the strongest in the region. This will be supported by ongoing economic development, including infrastructure and trade investment, alongside favourable demographics and improved air connectivity, all of which promote increased travel engagement. Outbound growth from Saudi Arabia will moderate from the incredibly strong uplift in recent years (113% between 2019 and 2025), partly as domestic development provides greater competition to other regional and global destinations. Several global destinations are unlikely to repeat their recent market share gains from Saudi Arabia.

Türkiye is set to record solid growth for a large market, but the uplift will be stronger for the United Arab Emirates, Bangladesh and Morocco, with projected increases of between 30% and 40% for all three. Several smaller markets, such as Kuwait, Jordan and Qatar will see even stronger growth, but from relatively smaller bases.

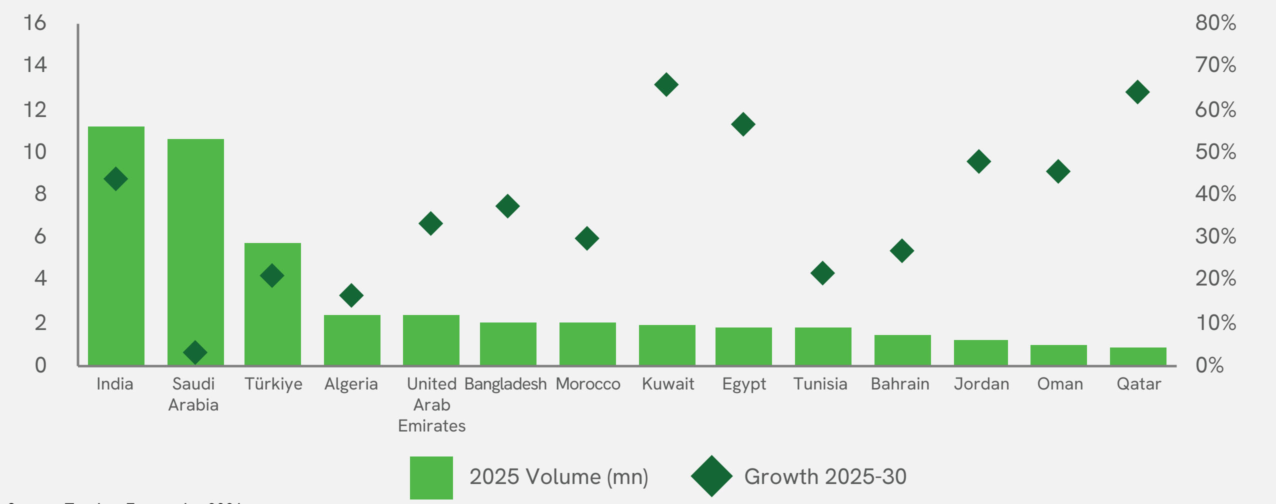
Travel habits also differ across these outbound markets, including in terms of spending levels. Outbound leisure travellers from the United Arab Emirates have a particularly high average daily spend of more than $350 per person per night, which is significantly above the MENASA-wide average of around $200. By comparison, outbound leisure travellers from India spend an average of $150 per night. While average wealth plays a role in these differences, so too does destination choice and other compositional effects. For instance, many South and Southeast Asian destinations, which are popular choices among Indian travellers, are generally cheaper than GCC countries, which are prominent destinations for UAE residents.

India is MENASA's largest outbound leisure market, and is projected to grow by 44% over the next five years.

Source: Tourism Economics 2026

Large and Growing MENASA Outbound Leisure Markets

2025 volume of outbound visits in millions (left side) and expected growth to 2030 (right side)



Source: Tourism Economics 2026

DRIVERS OF PROPENSITY TO TRAVEL

Outbound travel activity is driven by several factors, including a population's engagement with travel – that is, how likely they are to journey internationally.

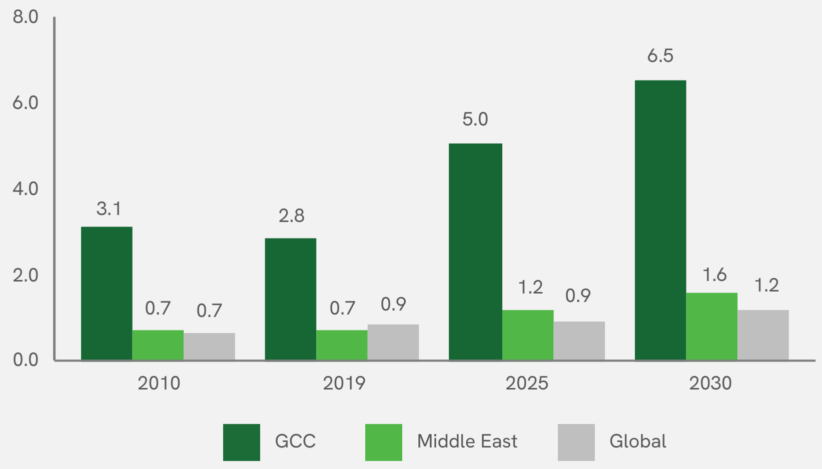
High and rising propensity to travel has fueled GCC outbound growth

Propensity to travel internationally is particularly high in the GCC, and has increased notably in recent years. On average, GCC residents spent 5 nights in paid accommodation while undertaking outbound travel in 2025, more than four times the global total. This propensity rose notably relative to 2019 and is set to increase further by 2030. The wider Middle East region also has an outbound travel propensity above the global average, though it remains well below that of the GCC.

Outbound nights per capita are particularly high in Bahrain and Kuwait, though this partly reflects concentrated short-haul, intra-regional travel. The United Arab Emirates (4.1 nights per capita) and Saudi Arabia (2.9) also have relatively high engagement with outbound travel, with both increasing more than one night per capita since 2019. There is a high degree of intra-regional travel between neighbouring GCC countries. However, excluding intra-regional trips, the propensity for long-haul travel is well above average.

Outbound travel growth is also outpacing that of domestic, as travelers have increasingly set their sights on venturing further afield. Global outbound nights will increase 37% between 2025 and 2030, compared to domestic growth of 15%. This represents a resumption of a long-run trend of international travel gaining

Propensity to Travel Outbound
Outbound nights in paid accommodation per capita



Source: Tourism Economics 2026

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prominence, which was temporarily disrupted during the pandemic. The continual shift towards outbound travel has come alongside improved connectivity, greater awareness of international destinations, through improved technology and marketing channels, and easing of visa restrictions.

The Middle East and the GCC are both projected to see growth in outbound nights of over 40% in the coming five years, well above the expected domestic uplift of a little over 10%. Similar patterns will be observed in North Africa and South Asia. Alongside the high propensity to travel internationally, the outbound share of travel is particularly high in the GCC: one-third of all nights travelled (domestic and outbound combined) in 2025, which is set to rise to almost 40% by 2030. This is comparable to the broader Middle East, and higher than both North Africa (16% in 2025) and South Asia (30%), though both the latter two are also set to see strong increases in outbound share of travel by 2030.

Outbound travel will continue to outpace domestic tourism as international experiences become more appealing and accessible.

Source: Tourism Economics 2026

Outbound Share of Nights Travelled by Population

	2025	2030
Middle East	33%	39%
GCC	34%	39%
North Africa	16%	21%
South Asia	30%	35%
Global	31%	35%

Source: Tourism Economics 2026

Engagement in travel driven by income and wealth

Household income and wealth are key drivers of travel engagement, influencing the frequency, length and spending of trips as well as destination choice. GCC countries have some of the world's wealthiest and least indebted households, supporting strong demand for outbound travel. In 2025, Oxford Economics placed Qatar's GDP per capita at almost five times the global average, and the UAE's at more than three times. Private wealth also continues to deepen, with UBS' Global Wealth Report 2026 citing 183,000 US dollar millionaires in the UAE in 2025 (up 3.5% from the previous year) and 348,000 in Saudi Arabia (up 2.6%). Household debt accounts for barely 6% of gross wealth in both markets, among the lowest among the 56 countries surveyed, indicating that discretionary travel spend is largely insulated from the credit cycles that shape demand elsewhere.

The spending power created by this wealth registers at a national scale. Saudi residents spent $6.7 billion abroad in Q4 2025, accounting for 21% of all service imports to the Kingdom's economy and positioning tourism as the second largest services import, according to the General Authority for Statistics. Approximately 93% of this spend was on non-business travel, highlighting a key opportunity for destinations able to compete on leisure and other types of travel, including religious travel and visiting friends or relatives.

Saudi residents spent $6.7 billion in international destinations in Q4 2025, with personal travel accounting for over

90%

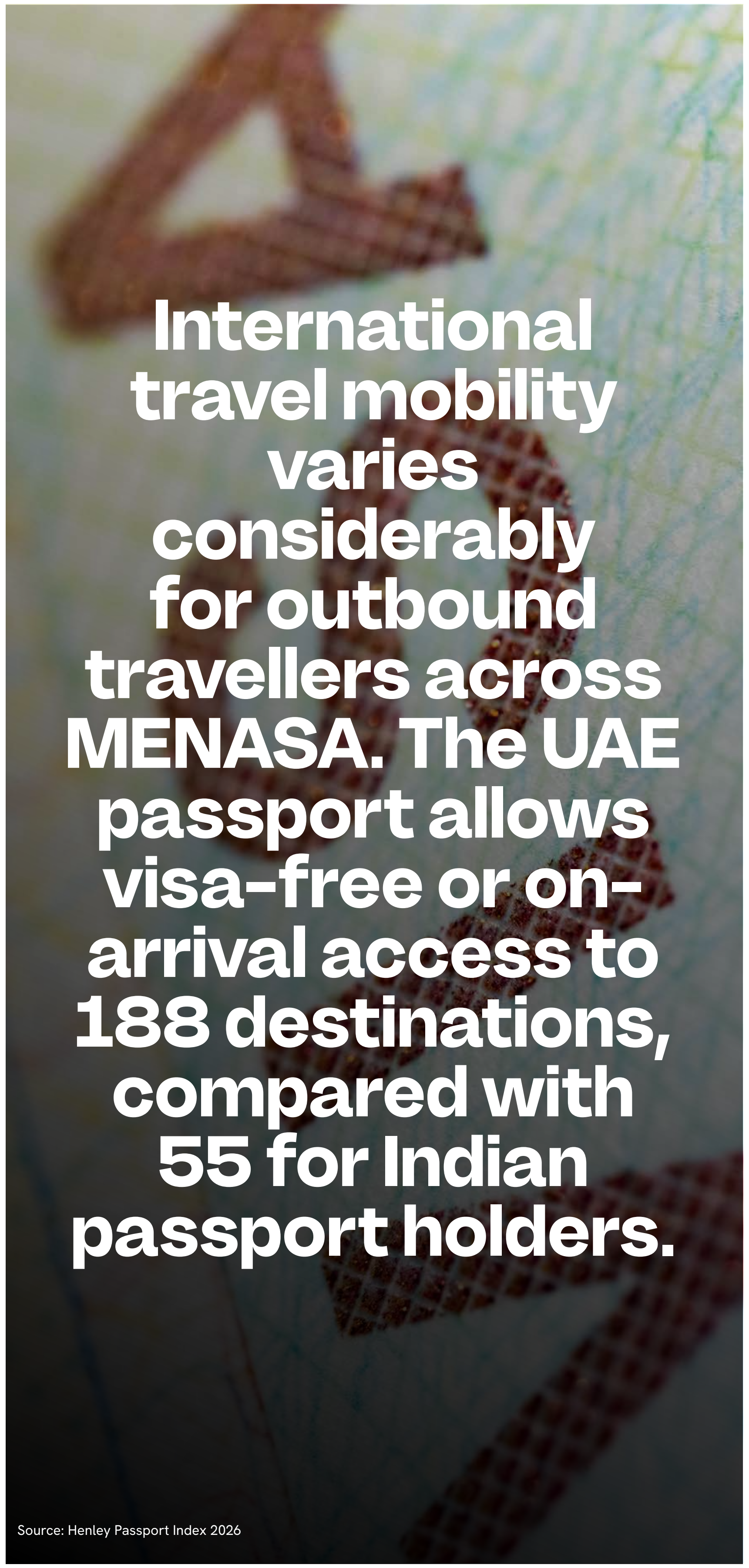
of the total.

Source: General Authority for Statistics 2025

Mobility and accessibility constraints are important differentiators

The ability to afford travel is important, but so is the ease with which individuals can engage in international tourism, including access to transport options and entrance into foreign countries. MENASA outbound travellers are increasingly differentiated by mobility. Outbound travel from South Asian markets is constrained by administrative barriers as well as economic ones, while GCC travelers face relatively few bureaucratic constraints. The Henley Passport Index, built on IATA data, ranks the UAE passport joint second most powerful in 2026, with visa-free access to 188 destinations. This is up from 35 visa-free countries and 62nd place two decades ago, representing the largest gain in the Index's 20-year history. Under European Commission rules, Saudi nationals resident in the Kingdom are eligible for five-year Schengen visas regardless of previous travel history, with equivalent provision for Bahraini nationals meeting standard short-stay conditions.

Outbound travellers from other MENASA regions face greater diplomatic and administrative restriction. Indian and Algerian passports both rank 80th on the Henley Index with visa-free or on-arrival access to only 55 countries, and Indian applicants must provide evidence that they have lawfully used two visas within three years before qualifying for a two-year Schengen visa. Indian nationals also face a Schengen refusal rate of 15.8% in 2025 against a global average of 14.6%, according to European Commission data.



International travel mobility varies considerably for outbound travellers across MENASA. The UAE passport allows visa-free or on-arrival access to 188 destinations, compared with 55 for Indian passport holders.

Source: Henley Passport Index 2026

Population size is also a contributing factor to outbound growth

The size of each market's population remains a contributing factor for outbound growth, coupled with the propensity to travel. For instance, the GCC's population is forecast to grow by just over 6 million by 2030. This relatively modest expansion in the pool of potential travellers will contribute to slower outbound growth than in other parts of MENASA, despite a strong increase in travel propensity.

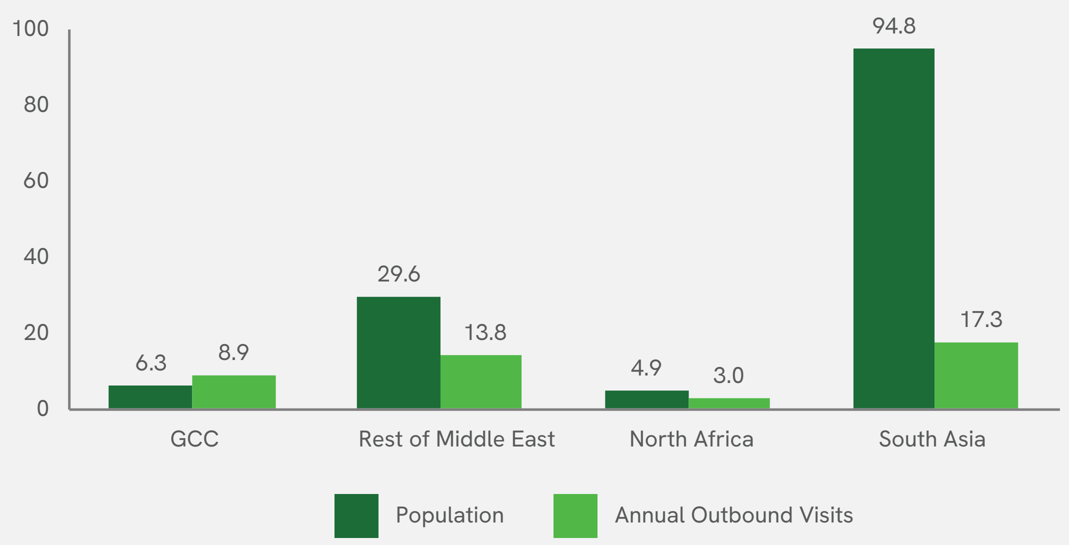
By comparison, South Asia is projected to add 95 million residents, and the non-GCC Middle East almost 30 million, providing significant growth in travel potential. Further economic development and improvements in mobility are required to see that potential fully realised.

Outbound nights per capita are significantly lower in South Asia (0.2 in 2025) than in the GCC (5.0) or wider Middle East (1.2), but will add far more travellers due to large population increases.

Source: Tourism Economics 2026

MENASA Population and Outbound Visits Growth (2025-2030)

Millions



Source: Tourism Economics 2026

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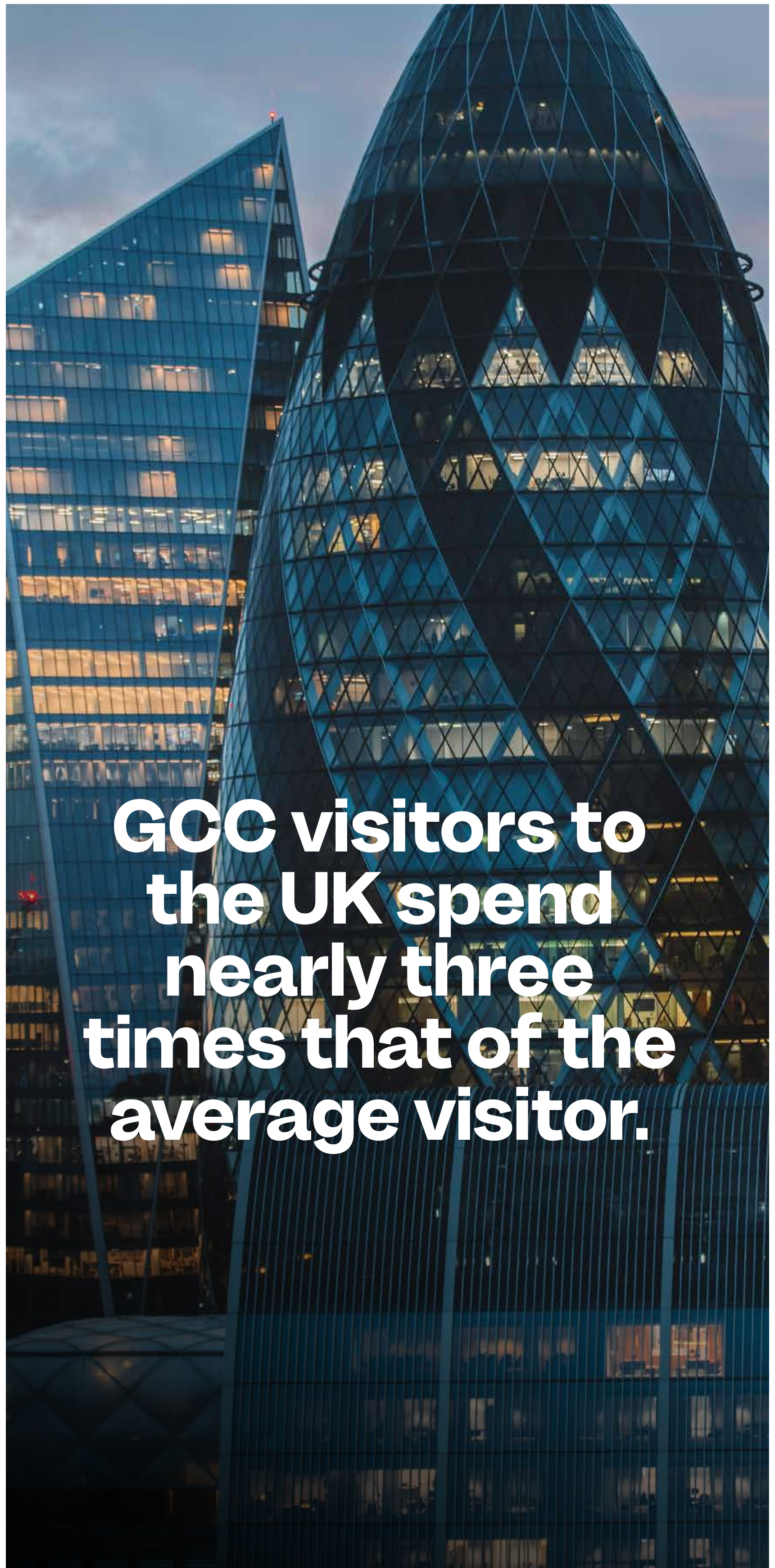
KEY THEMES AND PREFERENCES

Evolving consumer preferences and destination offerings also play a crucial role in determining where travellers choose to visit. Demand is shaped by how families travel together, what is expected from a premium stay or a live event, how deeply travellers wish to engage with a destination, and how far in advance trips are booked.

Luxury travel remains crucial for outbound as well as inbound travelers

Outbound GCC travellers spend at a rate that few markets can match, particularly in luxury hotspots across Europe. According to VisitBritain, GCC visitors to the UK spent a total of $3.0 billion across 1 million visits in 2024. This was an average of almost $3,000 per visit, around three times the average from all visitors and ranked alongside the USA as the UK's highest-spending inbound market. Meanwhile, VisitBritain's aggregated Visa transaction data for 2026 identifies Saudi Arabia and the UAE as Britain's fastest-growing source markets for card spending, up 74% and 43% year on year, respectively.



Source: VisitBritain 2025

Family-friendly destinations are gaining share

Across MENASA, consumers are increasingly travelling with their extended families, although the size of travel parties vary by outbound market. In the Middle East, trips are often built around three generations travelling together: in their Travel Trends Report 2026, Skyscanner report that almost a third of UAE residents have travelled with both their parents and grandparents in the past two years, and two in five plan to travel with their family in 2026. Accommodation preferences reflect this, as 83% of UAE and 90% of Saudi travellers report that family-friendly accommodation is important to them, according to research conducted by Marriott in 2026.

Indian outbound travellers are also prioritising multi-generational travel, but increasingly by skipping the middle generation. Among Indian families where grandparents travel with the family, 79% have taken or are planning to take a 'skip-gen' holiday – grandparents travelling alongside grandchildren, with no parents present – based on recent research from Hilton.

Multigenerational travel is important, with

41%

of UAE residents planning to travel with their family in 2026.

Source: Skyscanner 2025

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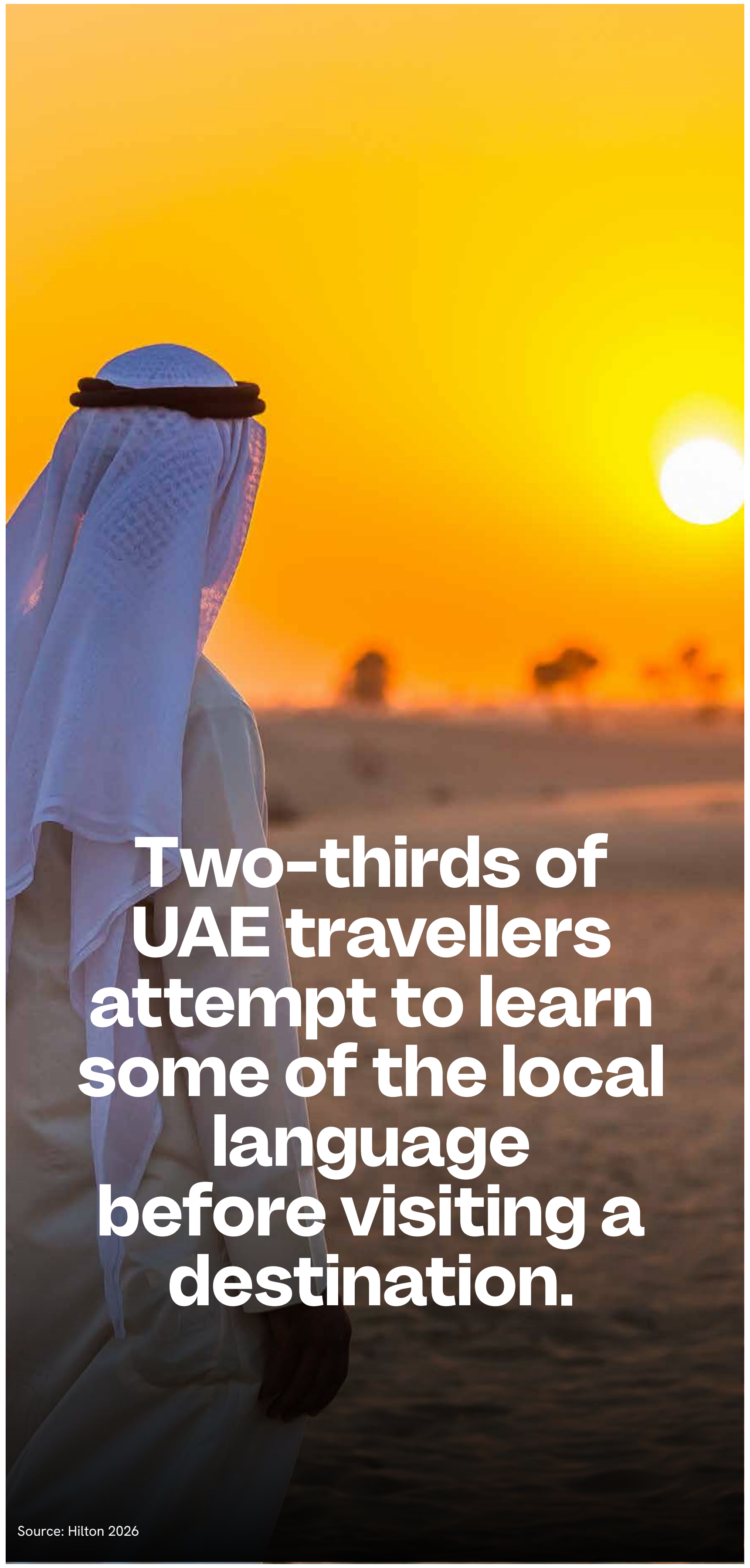
Cultural curiosity is driving growth beyond established historic linkages

Travellers from the Middle East rank highest on cultural curiosity. Hilton's 2026 research also reveals that two-thirds of UAE and Saudi travellers make efforts to learn some local language before visiting, the highest of 14 markets surveyed. This cultural curiosity extends beyond the planning stage and into the trip itself: around 70% of these travellers actively seek out local customs they have not researched in advance, reflecting preferences for both local engagement and spontaneity in-destination.

This appetite shapes both the structure and content of the trip. The Marriott research highlights that these travellers want to experience diverse destinations: three quarters of UAE and Saudi travellers expect to take a multi-country trip in 2026. In addition, the Hilton study finds that 81% of UAE travellers 'hotel hop', or book multiple hotels within a single destination, motivated by a wish to experience different neighbourhoods (52%) and mix budget stays with luxury ones (46%). As GCC outbound travellers build discovery into their itineraries, destinations and hotels are increasingly competing for a few nights of the trip rather than its entirety.



Source: Hilton 2026

Events calendar is driving destination choice

Outbound trips are increasingly anchored around live events for MENASA travellers. YouGov's 2026 Sport Tourism study found that almost a quarter of global consumers expected the 2026 calendar of the FIFA World Cup, Winter Olympics and ICC T20 World Cups to shape their travel plans. The UAE stands out with 57% of residents having taken a leisure trip specifically to attend a sporting event, the highest share across 17 markets surveyed, including 40% who travelled internationally. India shows comparable appetite (48%), though travel for sporting events is predominantly domestic (43%). For both the UAE and India, football and cricket dominate sports-related travel.

Music is also a key driver of outbound travel, particularly for younger MENASA audiences, with events often dictating destination choice. Airbnb research found that 62% of Indian Gen Z respondents plan to travel for concerts or festivals in 2026, while 76% had visited a city for the first time to attend a live event and more than 40% would travel internationally for a music event.

57%

of UAE residents have undertaken a leisure trip specifically to attend a sports event.

Source: YouGov 2026

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GCC travellers prefer to book late and remain flexible

Outbound GCC travellers book far closer to departure than their European counterparts. Marriott's 2026 Ticket to Travel report found an average lead time of 2.5 months among travellers in the UAE and 1.6 in Saudi Arabia, against a wider European and Middle East average of 3.4 months. In addition, search data from regional travel platform Wego shows that nearly 70% of UAE searches occur within a month of departure. However, this varied by destination with UAE travellers to Georgia and Türkiye booking an average of 25 days ahead, while trips to Uzbekistan attracted the latest bookings with one in six booked the week before departure. Flexibility is also a key feature of GCC travel planning, with 37% of Saudi travellers intentionally leaving their plans open, according to recent Skyscanner research.

Flexible planning and short, destination-specific lead times therefore create narrow conversion windows for destinations targeting outbound GCC travellers. However, this allows destinations the opportunity to influence travel choices closer to the arrival time and provide more real-time offers and incentives.

UAE and Saudi travellers have shorter lead times than the global average, booking 2.5 and 1.6 months before departure, respectively.

Source: Marriott 2025

GLOBAL DESTINATIONS FOR MIDDLE EAST TRAVELLERS

Within-region destinations are the most popular for outbound leisure travellers from Middle Eastern countries. However, several longer-haul markets are set to see strong growth in coming years, as these outbound travellers look further afield for new destinations and experiences, and alongside improved connectivity.

Intra-regional countries dominate the top outbound leisure destinations

The top five destinations for leisure visits from Middle Eastern countries are all within the same region. Türkiye is the largest, welcoming 5.4 million outbound visitors from elsewhere in the Middle East in 2025, followed by Egypt, Bahrain, Saudi Arabia and the United Arab Emirates. These destinations combined received over half of all outbound leisure visits from the Middle East. Growth in Middle Eastern arrivals to these destinations will be modest in coming years or grow in line with the regional average of 23%, except for Saudi Arabia, which will see a strong uplift. This partly reflects maturity of these holiday locations for Middle Eastern travellers, most notably Türkiye and Egypt.

The five largest destinations for outbound leisure visits from the Middle East are within the same region, illustrating the importance of intra-regional travel.

Source: Tourism Economics 2026

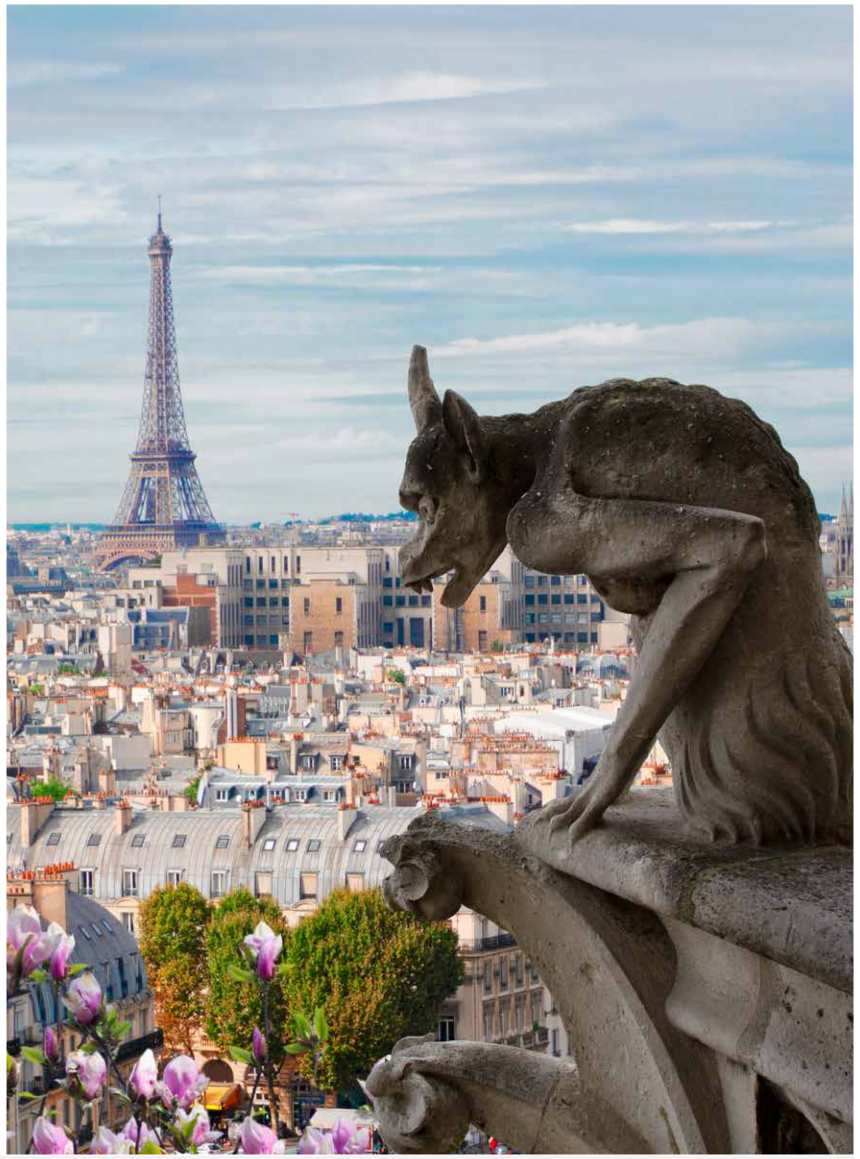
Largest Destinations for Outbound Leisure Visits from the Middle East

	Visits in 2025 (millions)	Share of Total Visits
Türkiye	5.4	13.0%
Egypt	5.2	12.5%
Bahrain	4.7	11.2%
Saudi Arabia	3.9	9.4%
United Arab Emirates	2.5	6.1%

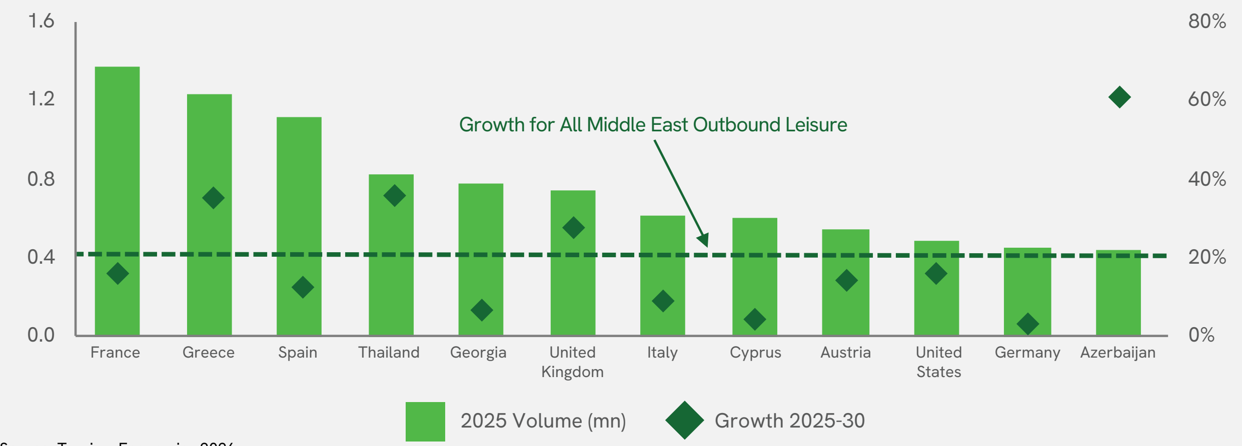
Source: Tourism Economics 2026

Europe popular among Middle Eastern leisure travellers

Outside the top five, inter-regional countries are more prominent as destinations for Middle Eastern outbound leisure travel. Many of these destinations are in Europe: France, Greece, Spain, the UK and Italy are popular and iconic destinations for leisure visitors from all over the world, as well as those from the Middle East. Most of these large destinations are projected to record slower growth in arrivals from the Middle East than the regional average, pointing to their maturity. Thailand is an exception: as well as being the largest destination for Middle Eastern leisure travel in Asia-Pacific by some margin, it is set to see an uplift of 36% in the coming five years.



Large Inter-regional Destinations for Middle East Outbound Leisure
2025 volume of outbound visits from Middle East (left) and expected growth to 2030 (right)



Source: Tourism Economics 2026

Asia-Pacific home to many key growth destinations for Middle Eastern leisure visits

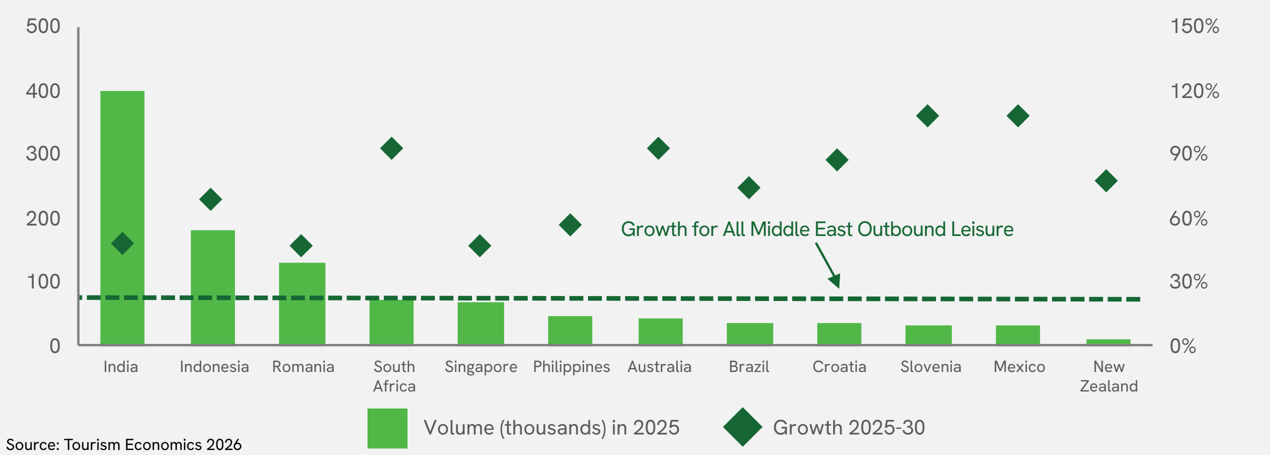
Several long-haul destinations will see the largest increases in Middle Eastern outbound leisure visits, pointing to the improving connectivity of transport links and consumers' search for new and exciting destinations. India, which already has strong connections to several GCC and Middle Eastern countries, is projected to see growth of 48%. This uplift will be equalled or exceeded by travel to several other Asia-Pacific destinations, including Indonesia (+68%), Singapore (+47%), Philippines (+56%) and Australia (+93%). Slovenia and Croatia are also projected to see close to a doubling of visits, as Middle Eastern travellers increasingly look to emerging European destinations for new leisure experiences. Further afield, South Africa, Mexico and Brazil are all set to welcome increased visitation from the region of 75% or more by 2030.

Many long haul destinations, including Indonesia, South Africa, Singapore and Australia, will see strong growth in leisure visits from Middle Eastern travellers.

Source: Tourism Economics 2026

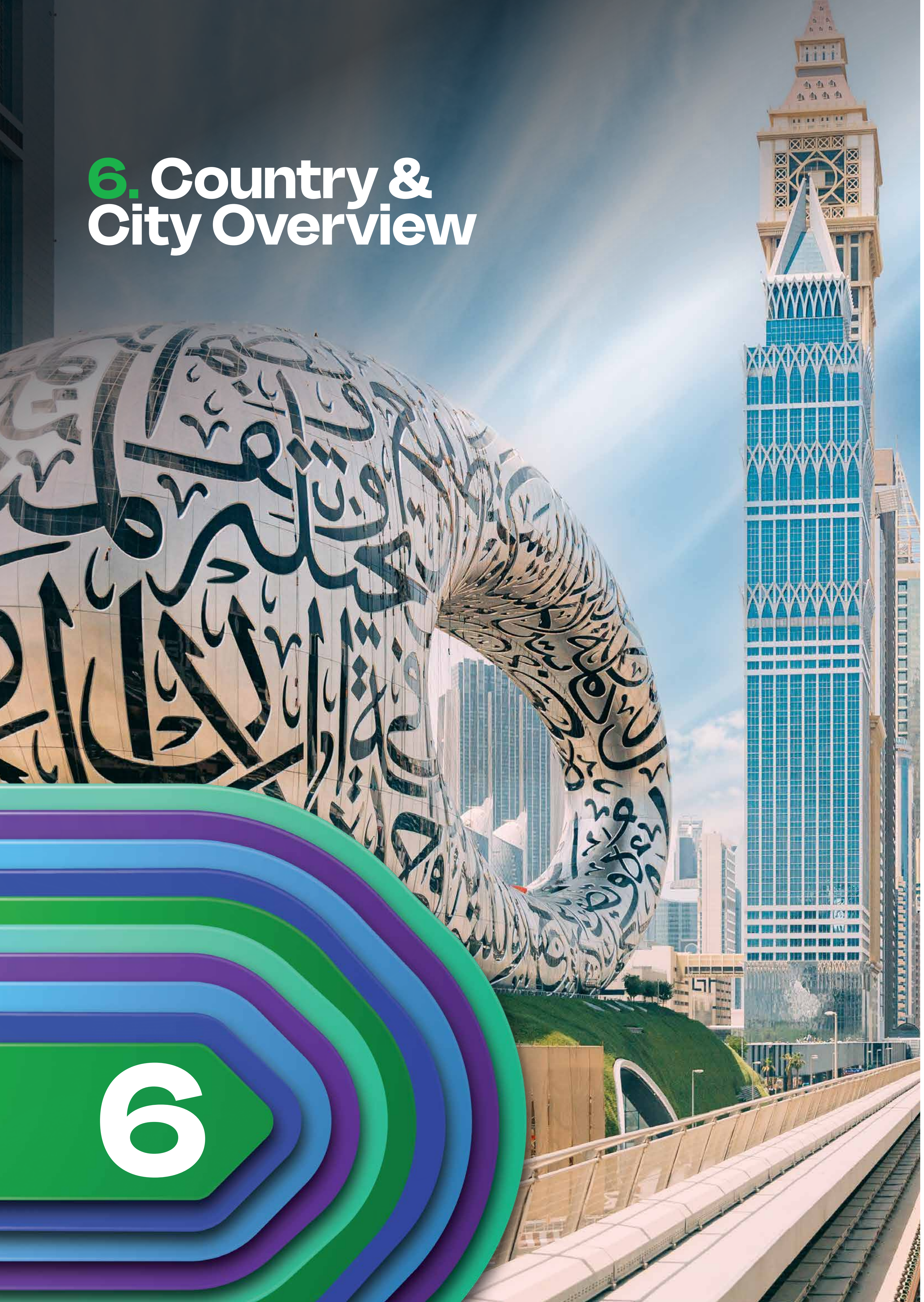
Prominent Inter-regional Growth Destinations for Middle East Outbound Leisure

2025 volume of outbound visits from Middle East (left) and expected growth to 2030 (right)



Source: Tourism Economics 2026

6. Country & City Overview



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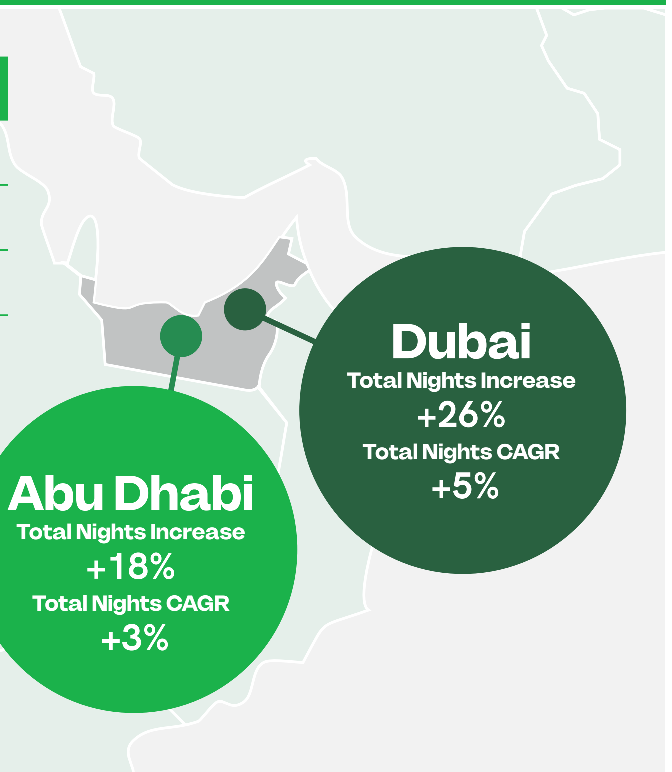
United Arab Emirates

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	24%	4%
Domestic Nights:	26%	5%
Inbound Nights:	24%	4%
Outbound Nights:	69%	11%



Inbound Composition 2025
% of Total Inbound Nights

Leisure	36%
Business	24%
Other	40%

Outbound Composition 2025
% of Total Outbound Nights

Leisure	34%
Business	8%
Other	58%

Top Inbound Source Markets Outside Region 2025
% of Nights from Outside Region

India	21%
United Kingdom	13%
China	6%

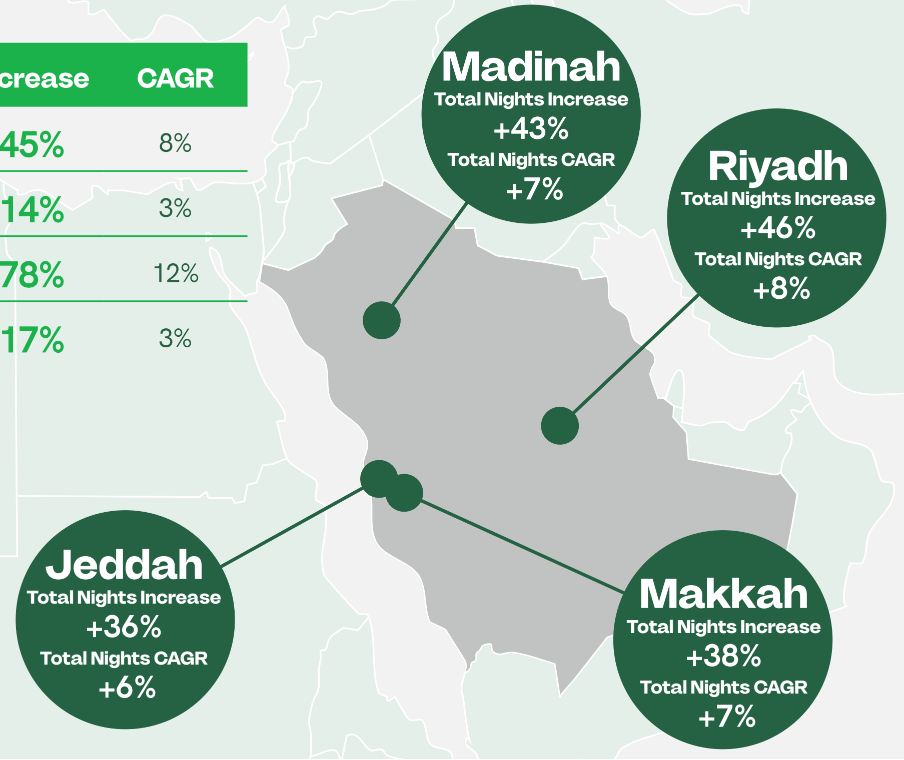
Top Outbound Destinations Outside Region 2025
% of Outbound Nights Outside Region

United Kingdom	25%
Thailand	16%
Italy	6%

Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate. Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Saudi Arabia

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	45%	8%
Domestic Nights:	14%	3%
Inbound Nights:	78%	12%
Outbound Nights:	17%	3%



Inbound Composition 2025

% of Total Inbound Nights

Leisure	19%
Business	4%
Other	77%

Outbound Composition 2025

% of Total Outbound Nights

Leisure	59%
Business	10%
Other	32%

Top Inbound Source Markets Outside Region 2025

% of Nights from Outside Region

Pakistan	20%
Algeria	20%
India	10%

Top Outbound Destinations Outside Region 2025

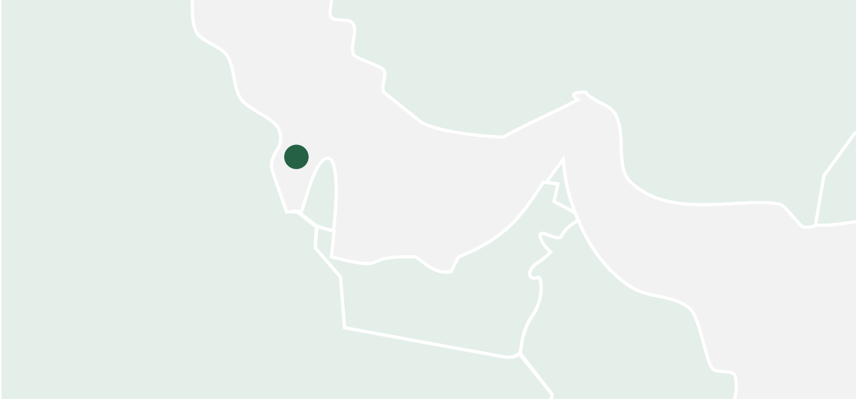
% of Outbound Nights Outside Region

Morocco	43%
United Kingdom	18%
Thailand	8%

Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate. Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Bahrain

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	8%	2%
Domestic Nights:	13%	3%
Inbound Nights:	8%	2%
Outbound Nights:	28%	5%



Inbound Composition 2025

% of Total Inbound Nights

Leisure	82%
Business	4%
Other	14%

Top Inbound Source Markets Outside Region 2025

% of Nights from Outside Region

India	49%
United Kingdom	10%
Philippines	9%

Outbound Composition 2025

% of Total Outbound Nights

Leisure	25%
Business	6%
Other	69%

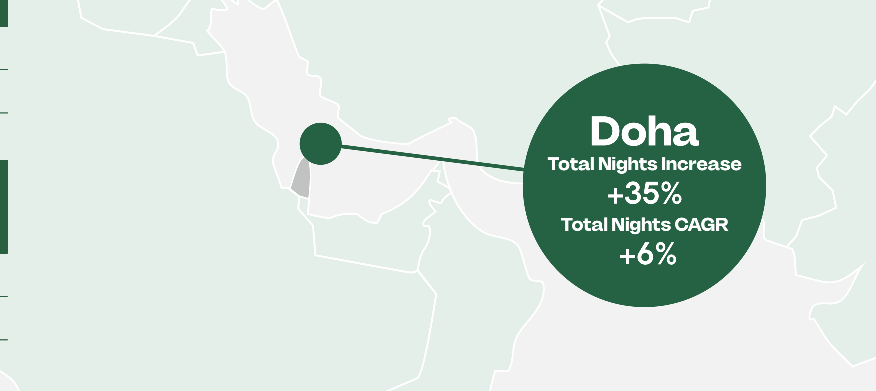
Top Outbound Destinations Outside Region 2025

% of Outbound Nights Outside Region

United Kingdom	32%
France	16%
Malaysia	8%

Qatar

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	35%	6%
Domestic Nights:	23%	4%
Inbound Nights:	37%	6%
Outbound Nights:	85%	13%



Inbound Composition 2025

% of Total Inbound Nights

Leisure	20%
Business	21%
Other	59%

Top Inbound Source Markets Outside Region 2025

% of Nights from Outside Region

India	31%
United Kingdom	17%
United States	13%

Outbound Composition 2025

% of Total Outbound Nights

Leisure	45%
Business	7%
Other	49%

Top Outbound Destinations Outside Region 2025

% of Outbound Nights Outside Region

United Kingdom	42%
Canada	6%

Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate. Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Kuwait

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	14%	3%
Domestic Nights:	14%	3%
Inbound Nights:	15%	3%
Outbound Nights:	39%	7%

Kuwait City
Total Nights Increase
+18%
Total Nights CAGR
+3%

Inbound Composition 2025
% of Total Inbound Nights

Leisure	19%
Business	24%
Other	57%

Top Inbound Source Markets Outside Region 2025
% of Nights from Outside Region

India	40%
United States	11%
Pakistan	10%

Outbound Composition 2025
% of Total Outbound Nights

Leisure	35%
Business	5%
Other	61%

Top Outbound Destinations Outside Region 2025
% of Outbound Nights Outside Region

United Kingdom	39%
Thailand	23%
Italy	11%

Oman

Inbound Composition 2025
% of Total Inbound Nights

Leisure	39%
Business	8%
Other	53%

Top Inbound Source Markets Outside Region 2025
% of Nights from Outside Region

India	23%
United Kingdom	21%
Argentina	16%

Outbound Composition 2025
% of Total Outbound Nights

Leisure	31%
Business	12%
Other	58%

Top Outbound Destinations Outside Region 2025
% of Outbound Nights Outside Region

India	36%
United Kingdom	23%

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	28%	5%
Domestic Nights:	14%	3%
Inbound Nights:	36%	6%
Outbound Nights:	67%	11%

Muscat
Total Nights Increase
+18%
Total Nights CAGR
+3%

Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate.
Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Iraq

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	17%	3%
Domestic Nights:	12%	2%
Inbound Nights:	24%	4%
Outbound Nights:	53%	9%

Baghdad
Total Nights Increase
+17%
Total Nights CAGR
+3%

Inbound Composition 2025
% of Total Inbound Nights

Leisure	25%
Business	22%
Other	54%

Top Inbound Source Markets Outside Region 2025
% of Nights from Outside Region

India	48%
Pakistan	40%
Azerbaijan	6%

Outbound Composition 2025
% of Total Outbound Nights

Leisure	25%
Business	5%
Other	70%

Top Outbound Destinations Outside Region 2025
% of Outbound Nights Outside Region

Malaysia	32%
India	26%

Jordan

Inbound Composition 2025
% of Total Inbound Nights

Leisure	13%
Business	10%
Other	77%

Top Inbound Source Markets Outside Region 2025
% of Nights from Outside Region

United States	20%
India	8%
France	5%

Outbound Composition 2025
% of Total Outbound Nights

Leisure	32%
Business	6%
Other	62%

Top Outbound Destinations Outside Region 2025
% of Outbound Nights Outside Region

China	18%
France	16%
Canada	11%

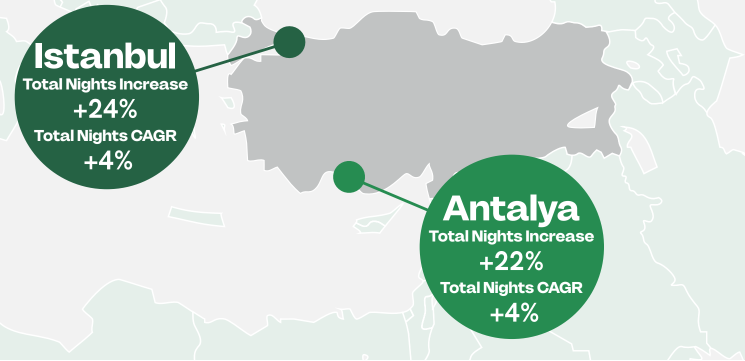
Growth Outlook 2025-30	Increase	CAGR
Total Nights:	10%	2%
Domestic Nights:	13%	2%
Inbound Nights:	9%	2%
Outbound Nights:	62%	10%

Amman
Total Nights Increase
+15%
Total Nights CAGR
+3%

Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate.
Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Türkiye

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	19%	4%
Domestic Nights:	13%	3%
Inbound Nights:	24%	4%
Outbound Nights:	32%	6%



Inbound Composition 2025 % of Total Inbound Nights	
Leisure	83%
Business	1%
Other	16%

Top Inbound Source Markets Outside Region 2025 % of Nights from Outside Region	
Germany	26%
United Kingdom	10%
Poland	4%

Outbound Composition 2025 % of Total Outbound Nights	
Leisure	50%
Business	10%
Other	40%

Top Outbound Destinations Outside Region 2025 % of Outbound Nights Outside Region	
United Kingdom	14%
Georgia	13%
Italy	8%

Egypt

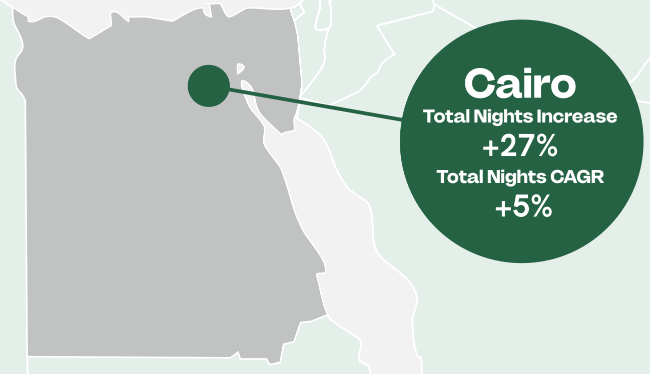
Inbound Composition 2025 % of Total Inbound Nights	
Leisure	98%
Business	<1%
Other	2%

Top Inbound Source Markets Outside Region 2025 % of Nights from Outside Region	
Libya	14%
Germany	11%
United Kingdom	7%

Outbound Composition 2025 % of Total Outbound Nights	
Leisure	22%
Business	9%
Other	69%

Top Outbound Destinations Outside Region 2025 % of Outbound Nights Outside Region	
Malaysia	37%
United Kingdom	13%
China	12%

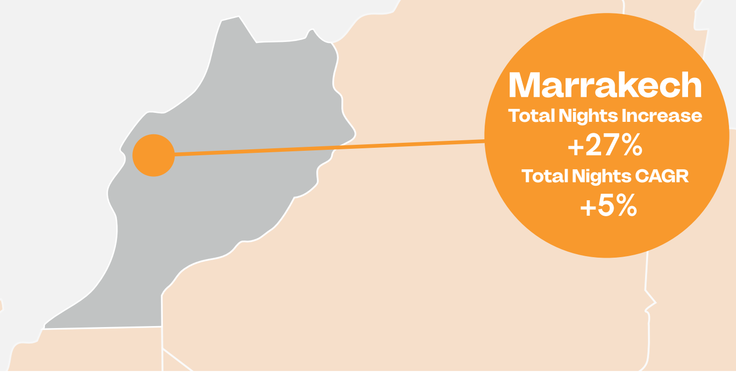
Growth Outlook 2025-30	Increase	CAGR
Total Nights:	15%	3%
Domestic Nights:	17%	3%
Inbound Nights:	14%	3%
Outbound Nights:	73%	12%



Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate. Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Morocco

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	13%	2%
Domestic Nights:	9%	2%
Inbound Nights:	33%	6%
Outbound Nights:	62%	10%



Inbound Composition 2025 % of Total Inbound Nights	
Leisure	40%
Business	7%
Other	53%

Top Inbound Source Markets Outside Region 2025 % of Nights from Outside Region	
Saudi Arabia	33%
France	27%
United Kingdom	11%

Outbound Composition 2025 % of Total Outbound Nights	
Leisure	38%
Business	5%
Other	56%

Top Outbound Destinations Outside Region 2025 % of Outbound Nights Outside Region	
Saudi Arabia	63%
Spain	9%
France	7%

India

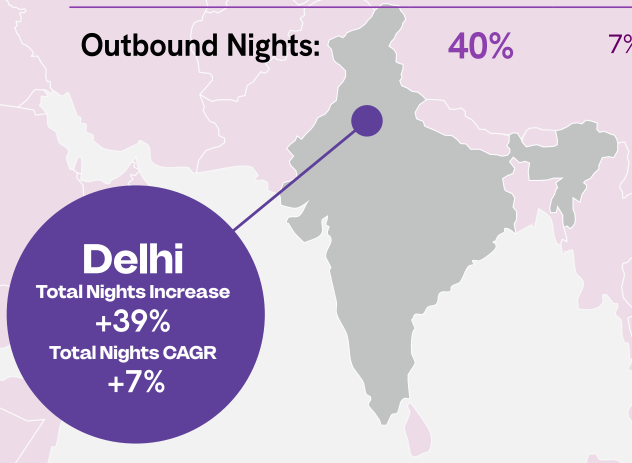
Inbound Composition 2025 % of Total Inbound Nights	
Leisure	38%
Business	5%
Other	57%

Top Inbound Source Markets Outside Region 2025 % of Nights from Outside Region	
United States	22%
United Kingdom	18%
Canada	5%

Outbound Composition 2025 % of Total Outbound Nights	
Leisure	32%
Business	15%
Other	54%

Top Outbound Destinations Outside Region 2025 % of Outbound Nights Outside Region	
United States	24%
Saudi Arabia	11%
Thailand	10%

Growth Outlook 2025-30	Increase	CAGR
Total Nights:	25%	5%
Domestic Nights:	17%	3%
Inbound Nights:	65%	11%
Outbound Nights:	40%	7%

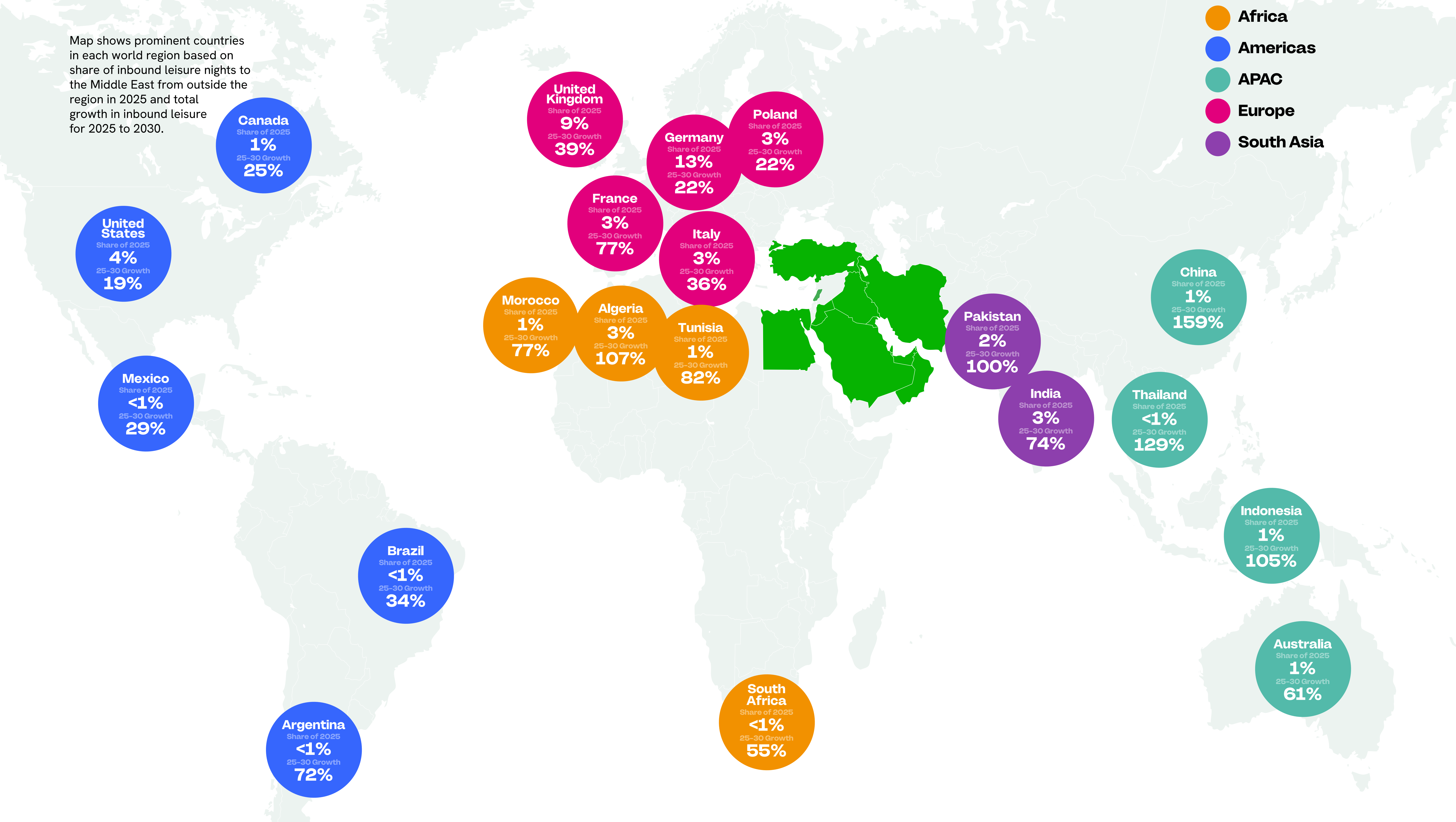


Note: Data shows growth for the period 2025 to 2030, unless stated otherwise. CAGR stands for Compound Annual Growth Rate. Outside region' refers to outside the Middle East, except for Morocco (outside North Africa) and India (outside South Asia)

Middle East Inbound Travel

Prominent Leisure Source Markets - Size and Growth

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

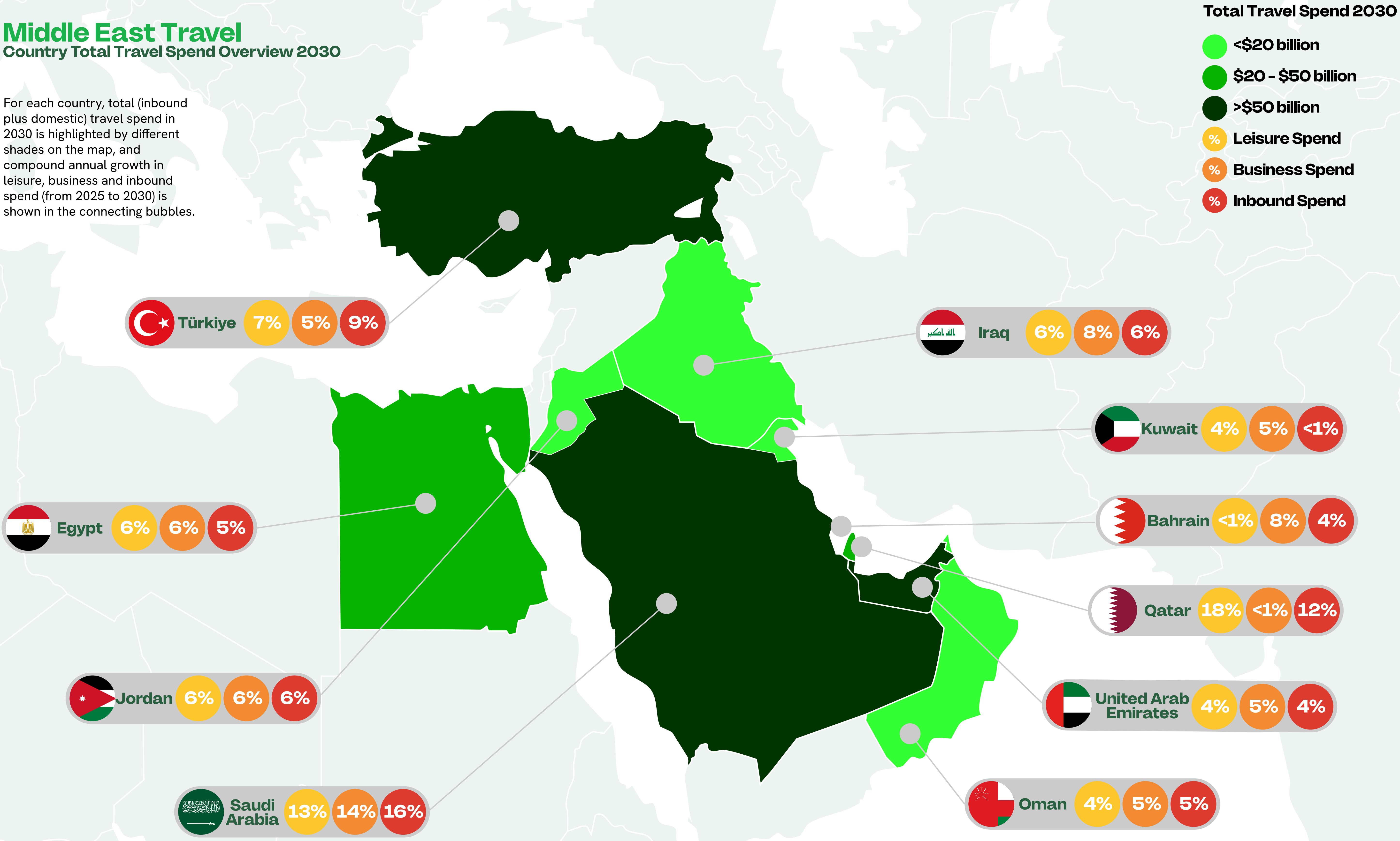


atm DUBAI
TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

atm DUBAI
TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Middle East Travel
Country Total Travel Spend Overview 2030

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



Middle East Travel

Country Outbound Travel Spend Overview 2030

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

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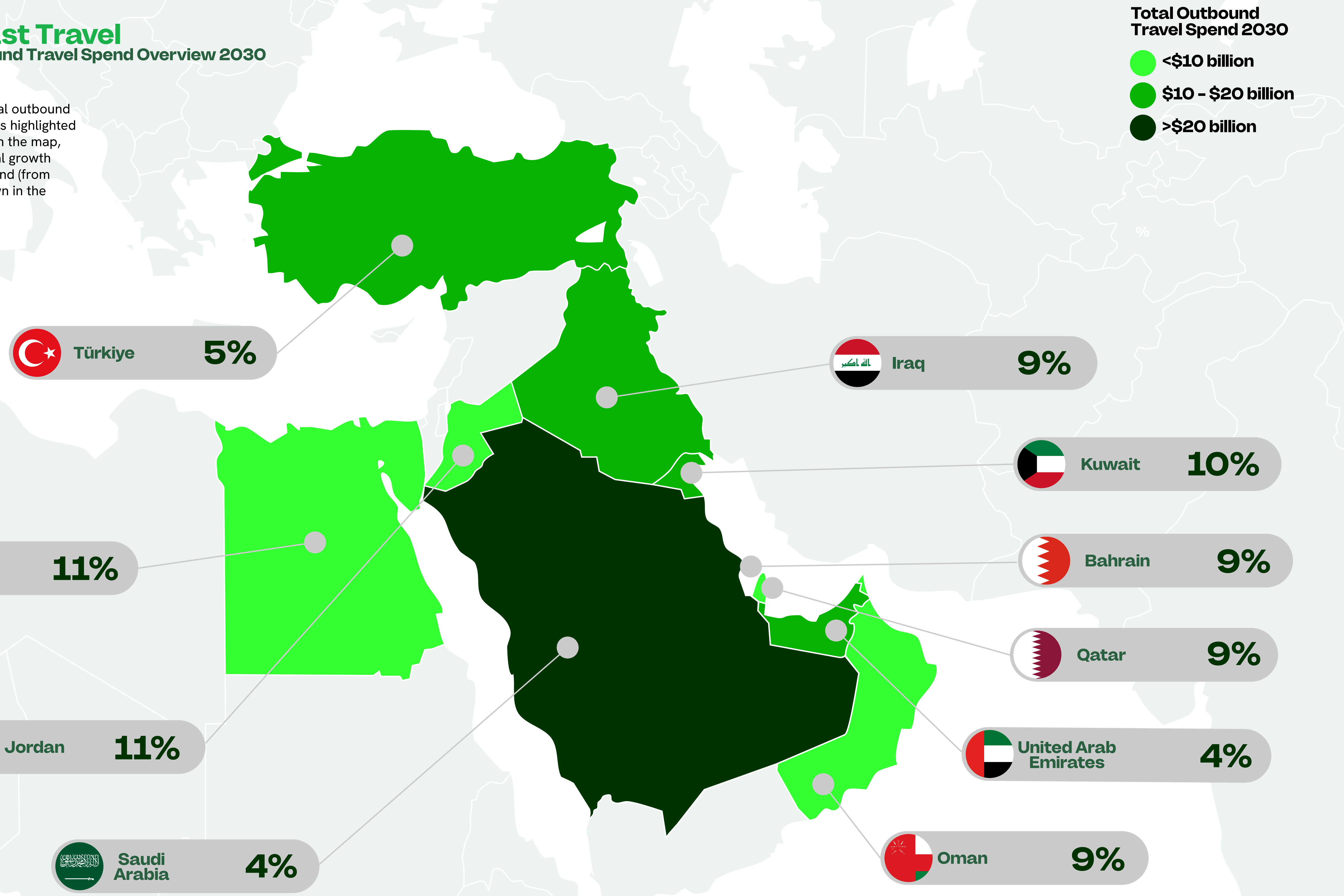
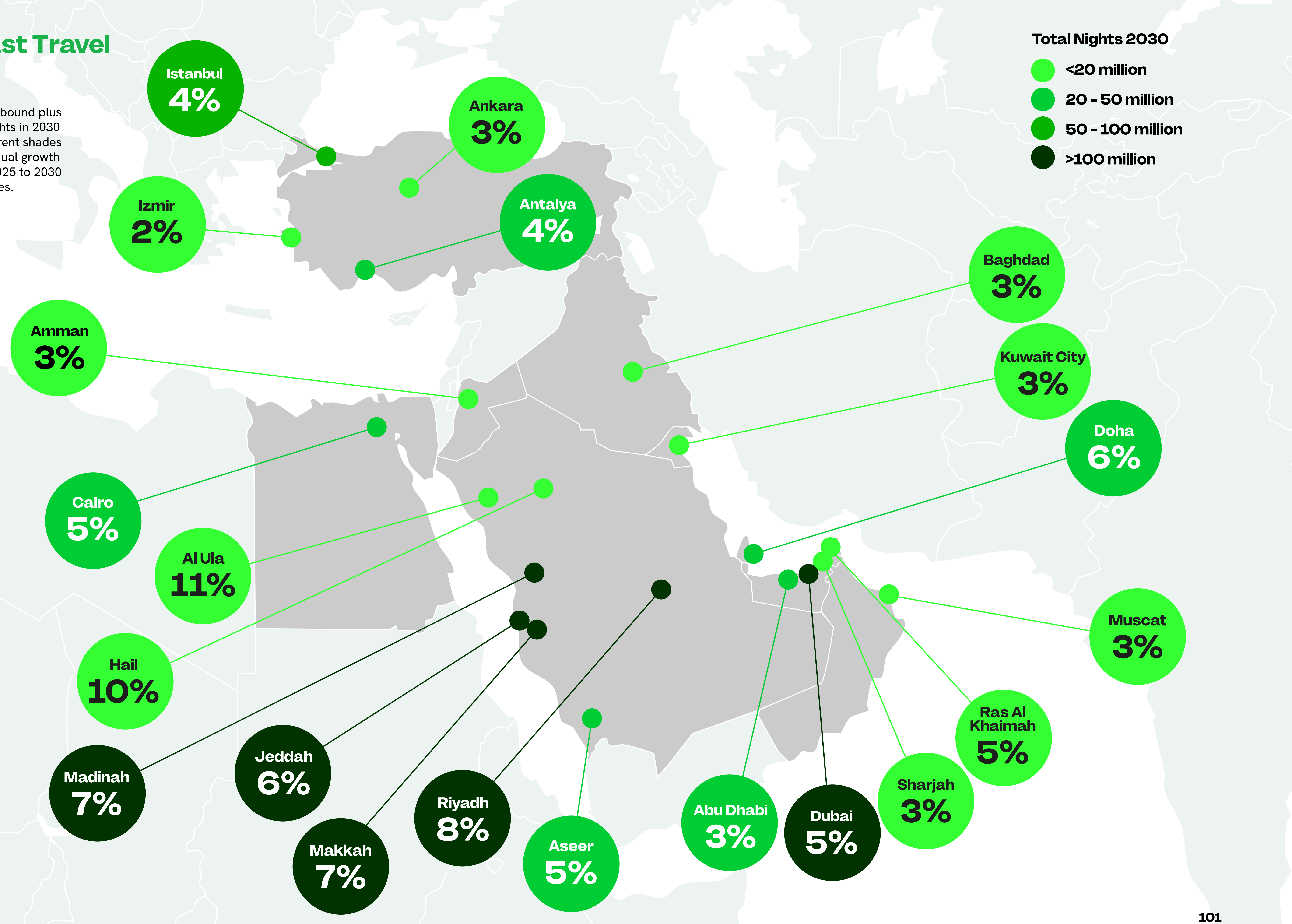


Middle East Travel
City Overview

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.



7. Business Events and the MICE Economy

Introducing ICCA

Business events are catalysts for knowledge exchange, innovation, and international collaboration, creating value that extends far beyond their economic contribution. At ICCA, we are committed to equipping destinations and industry stakeholders with the intelligence and insights needed to grow their impact within the global meetings industry.

We are delighted to share these business events insights in collaboration with ATM and Tourism Economics. They highlight the growing importance of the Middle East in the global association meetings landscape, with the region continuing to attract larger and higher-value events while strengthening its position as a leading hub for business events and knowledge exchange.

As destinations invest in infrastructure, connectivity, and long-term sector development, the opportunities for sustained growth are significant. We hope the insights presented in this report support stakeholders in making informed decisions and fostering collaboration that advances the future of the global business events industry.

Dr. Senthil Gopinath, Chief Executive Officer,
International Congress and Convention Association (ICCA)

> **“Business events are a significant driver of global travel, contributing substantially to the world economy while facilitating collaboration, knowledge exchange and innovation that generate wider benefits for destinations.”**
>
> *Dr. Senthil Gopinath, Chief Executive Officer,*
> *International Congress and Convention Association (ICCA)*

GLOBAL CONTEXT

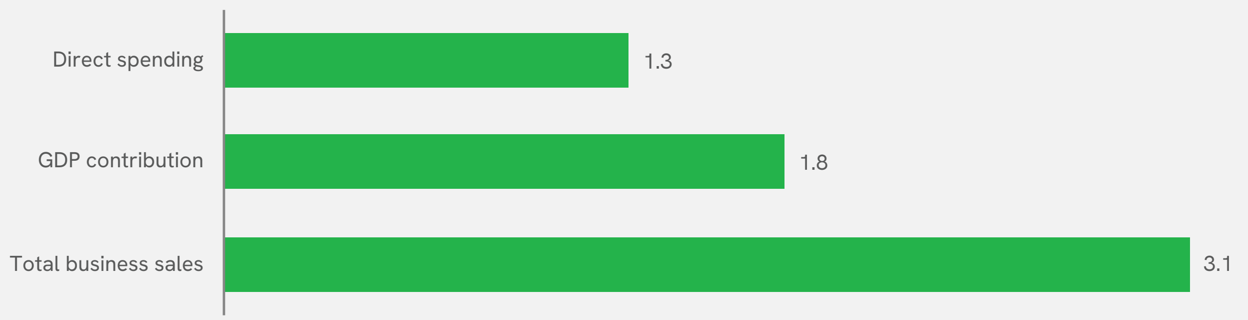
Business meetings and events are a major driver of business travel, bringing together corporations, government organisations and industry representatives across a range of formats and generating significant domestic and international travel.

Different event types, such as exhibitions and association meetings, are typically measured separately but together make up the wider business events economy. In 2025, business events attracted around 1.65 billion participants and generated an estimated $1.3 trillion in direct spending, supporting 24.2 million jobs worldwide, according to the Events Industry Council's economic impact study. On this basis, the business events industry is larger than the global air transport industry, although its individual segments are managed by different organisations and are rarely measured collectively.

Each business events segment (meetings, incentives, conferences and exhibitions, collectively known as MICE) has distinct operating and demand dynamics, resulting in different impacts for destinations.

- **Exhibitions** are the largest segment by output, generating €393 billion ($458 billion) across some 32,000 events in 2025 according to estimates by UFI, the global association of the exhibition industry. The segment has grown modestly in recent years, with global direct output increasing 3.8% annually since 2019.
- **Association conventions or meetings** are fewer in number, with 12,438 tracked by the International Congress and Convention Association (ICCA) in 2025. However, they attract internationally mobile delegates who stay for several nights and typically spend more than leisure visitors. These meetings also rotate between destinations on multi-year cycles, meaning today's bidding shapes activity three to seven years ahead and gives destinations and hospitality businesses greater scope to plan.
- **Government meetings** are the smallest segment by volume but the fastest-growing, increasing by 45% between 2024 and 2025 in ICCA's member-submitted data, compared with 12% growth for association meetings and broadly flat exhibition volumes. Host locations are determined primarily by institutional geography rather than commercial demand.
- **Incentive programmes** are private corporate events with no open registration, while destinations are selected according to company objectives rather than through the formal bidding or established hosting patterns associated with other business events. According to the latest research from the Incentive Research Foundation and the SITE Foundation, average spending on incentive trips globally was $5,100 in 2025.

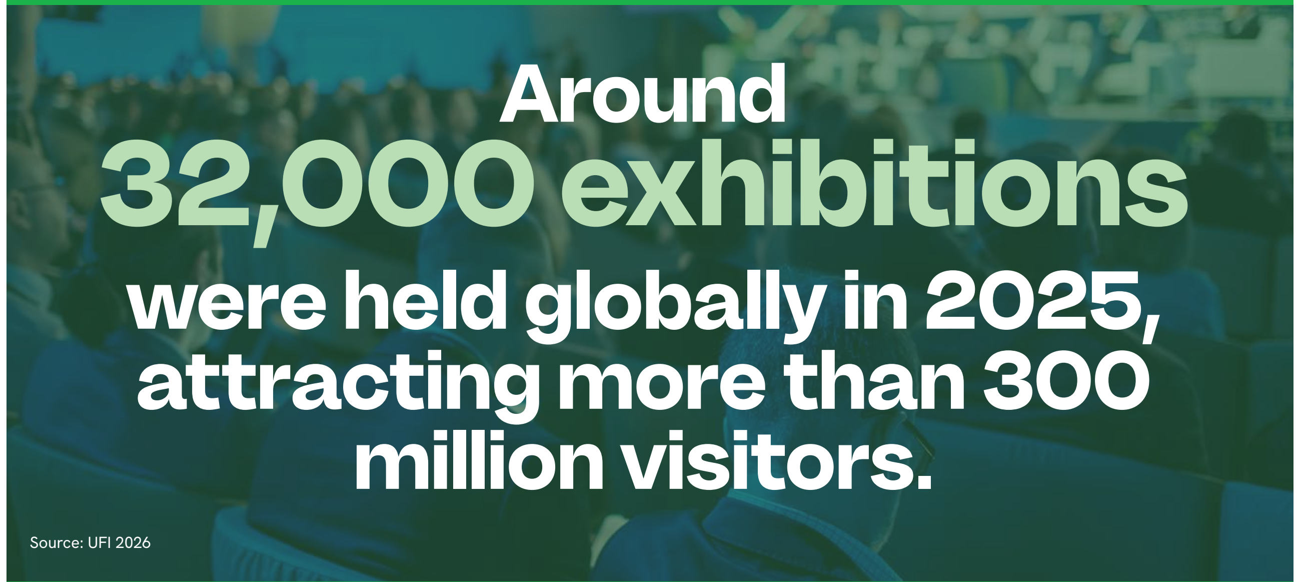
2025 Global Business Events Economy
($ trillion)



Source: Events Industry Council and Oxford Economics 2026

The global business events industry has a larger economic footprint than the air transport industry, generating direct spending of around $1.3 trillion in 2025.

Source: Events Industry Council and Oxford Economics 2026



International association and government meetings are an important part of the business events landscape, with nearly 15,000 tracked worldwide in 2025.

Source: ICCA 2026

ASSOCIATION AND GOVERNMENT MEETINGS OVERVIEW

ICCA data provides insight into trends across association and government meetings, an important and high-spending segment of the business events economy. This section of the report explores the distribution of this activity globally and across MENASA, the value generated by delegates and the market outlook to 2030.

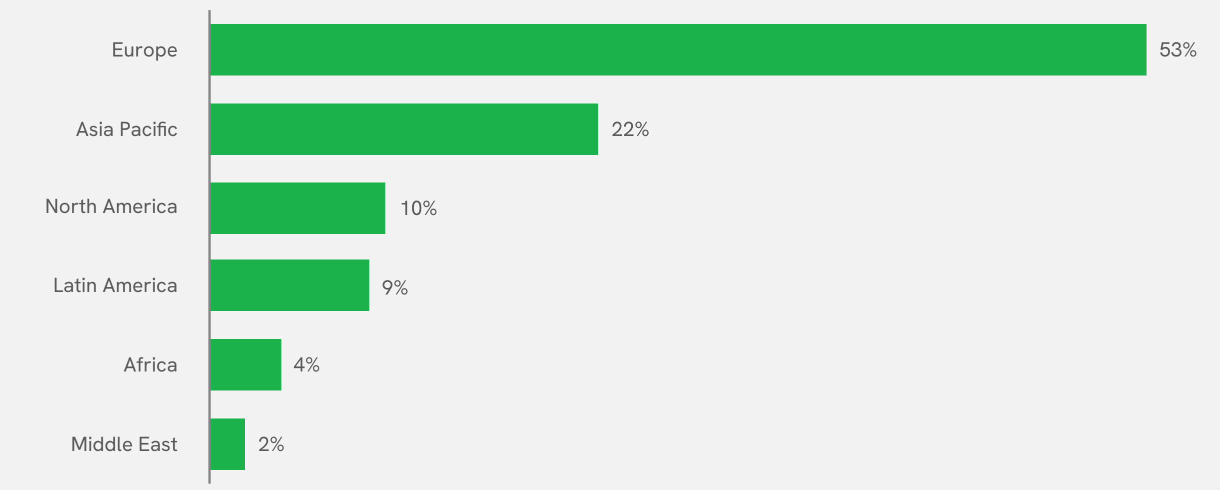
The global meetings landscape remains heavily concentrated in Europe, which hosted more than half (53%) of all international and regional association meetings in 2025, well ahead of Asia Pacific (22%) and North America (10%). By comparison, Africa and the Middle East accounted for just 4% and 2%, respectively.

Regional shares tend to shift gradually as congresses are secured years in advance, meaning earlier bidding decisions can shape the distribution of events over several years. Between 2024 and 2025, Europe's share of international association meetings fell by 2.6%, while the shares of the Americas and Asia Pacific rose by 1.4% and 0.6%, respectively. Meanwhile, the Middle East's share remained stable at 1.9%.

Despite its relatively small share, the Middle East recorded a 15.8% year-on-year increase in international and regional association meeting volumes, from 209 to 242 in 2025, compared with global growth of 12.1%.

A similar regional pattern is evident for government meetings. Europe dominates the segment, accounting for 50% of meetings in 2025, supported by strong institutional networks and a high concentration of institutional headquarters. The Middle East accounts for only around 2.6% of the fast-growing global government meetings segment.

2025 Share of International Association Meetings



Source: ICCA 2026

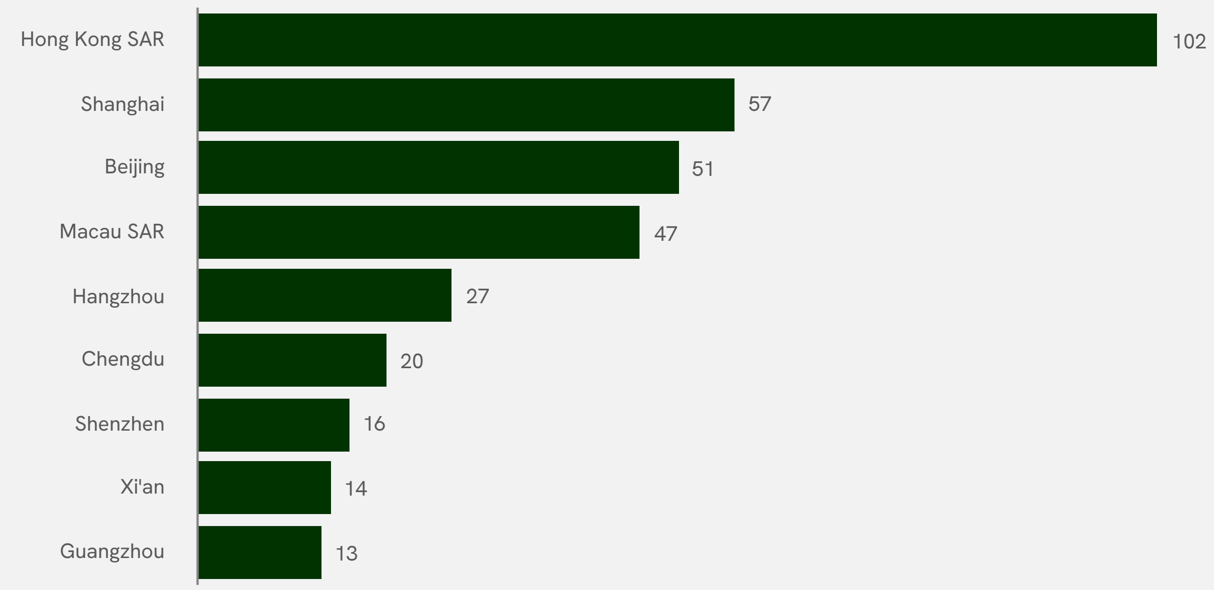
The Middle East recorded growth of more than 15% in association meeting volumes in 2025, outpacing the global average.

Source: ICCA 2026

China is an important market supporting the growth of meetings activity across Asia Pacific. Mainland China, excluding Hong Kong SAR and Macau SAR, was was the region's second-largest association meetings market in 2025, behind Japan, and ranked tenth globally, hosting 326 meetings compared with Japan's 491. Overall activity in China, including Hong Kong SAR and Macau SAR, was distributed across several leading cities, including Hong Kong SAR (102 meetings), Shanghai (57), Beijing (51) and Macau SAR (47).

China has an even stronger position in the exhibitions market, accounting for 31% of global indoor exhibition capacity in 2025, according to UFI. Recent capacity additions in the country have helped Asia Pacific overtake Europe as the world's largest region by exhibition space.

2025 Volume of Association Meetings in Leading China Cities



Source: ICCA 2026

MENASA ASSOCIATION AND GOVERNMENT MEETINGS LANDSCAPE

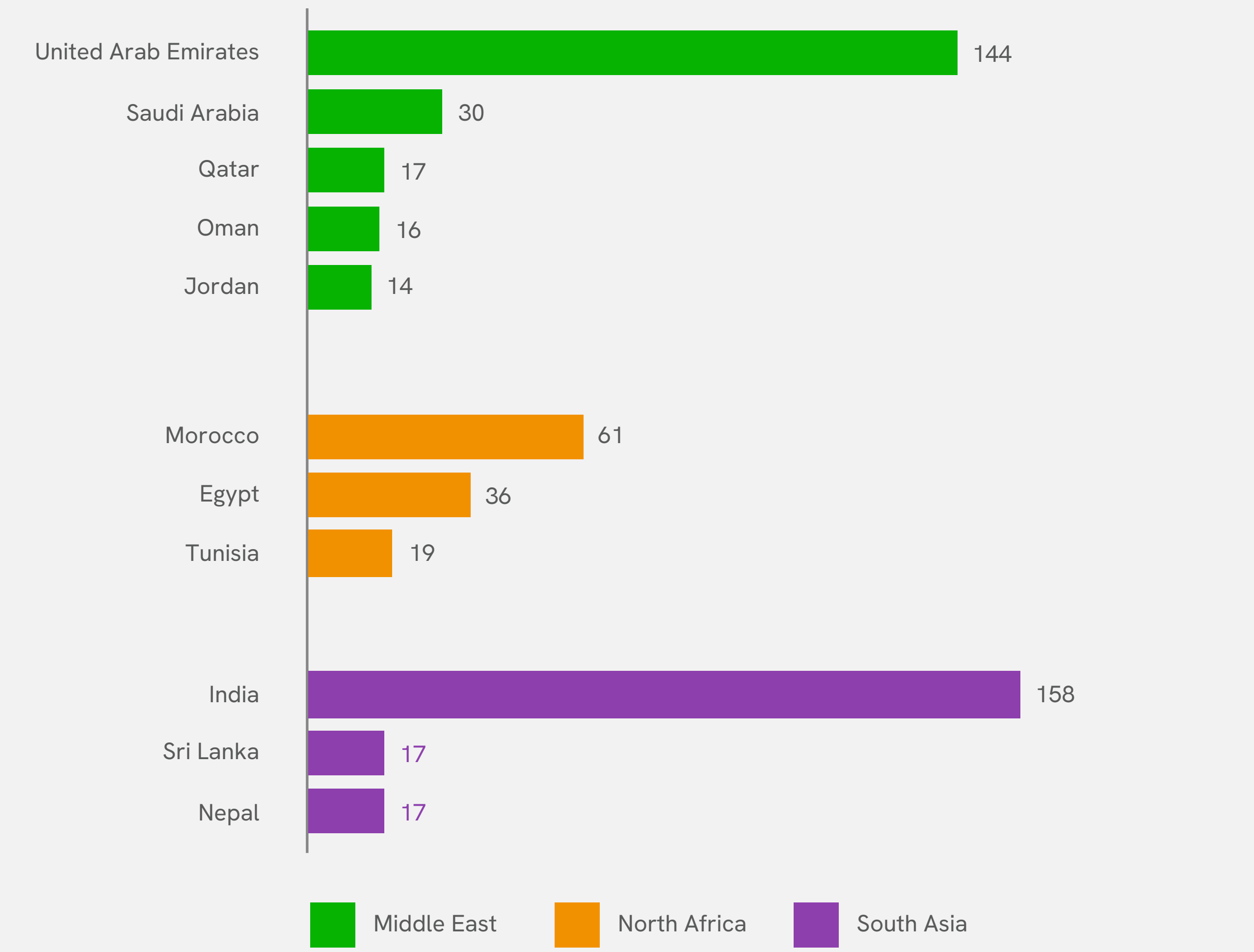
Association meeting activity across MENASA is concentrated in a small number of markets, though the distribution of activity within those markets varies by sub-region.

In 2025, India hosted the largest number of international and regional association meetings among MENASA countries, at 158, followed by the United Arab Emirates at 144. Together, they accounted for close to two-thirds of the regional total. Morocco (61) and Egypt (36) led in North Africa, while Saudi Arabia (30), Qatar (17), Oman (16), Jordan (14) formed a second tier in the Middle East.

The Middle East's prominence in industry discussions reflects the volume and scale of its events, alongside the pace of recent investment. Several major projects are underway, led by the AED 10 billion (around $2.7 billion) expansion of the Dubai Exhibition Centre, which will increase its capacity to 180,000 square metres across 26 halls by 2031.

At the city level, Dubai's prominence is particularly pronounced. In 2025, it led MENASA with a record 88 meetings, placing it 24th in ICCA's global city ranking, based on the number of qualifying international association meetings hosted. Within MENASA, Dubai was followed by Abu Dhabi (hosting 47 meetings), New Delhi (36), Cairo (27) and Marrakech (21).

2025 Volume of Association Meetings in Leading MENASA Markets

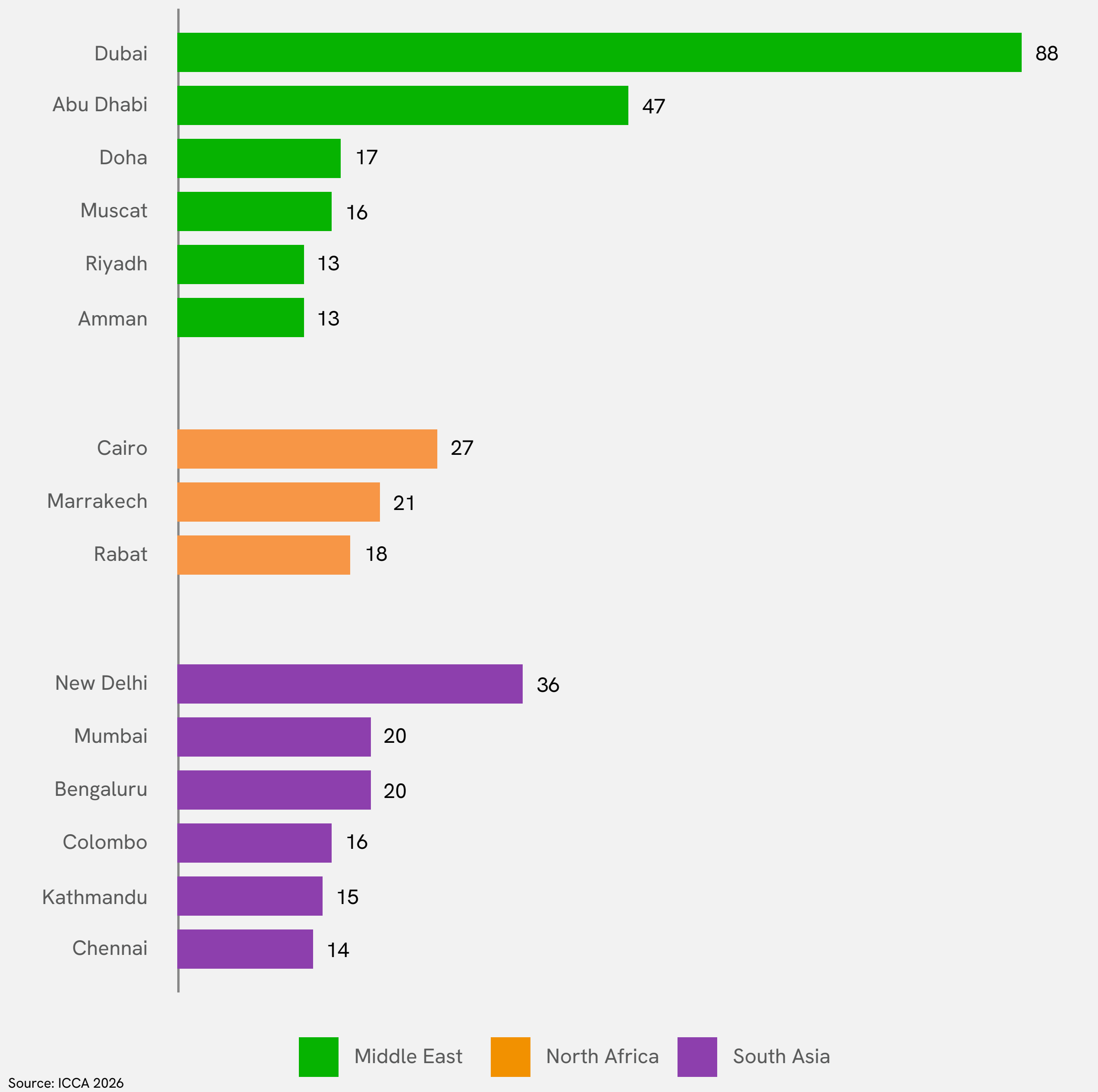


Source: ICCA 2026

Both venue capacity and institutional density distinguish the leading cities. The largest congress destinations combine the facilities needed to stage events at scale with a strong concentration of universities, research institutes and professional associations capable of anchoring bids.

Two structural features are evident from this distribution. First, MENASA encompasses markets at very different stages of development, ranging from established destinations with mature event calendars to emerging markets where recent infrastructure investment substantially exceeds current activity. Second, activity within each sub-region is centred on one or two cities, leaving national performance closely tied to the capacity and positioning of a small number of destinations.

2025 Volume of Association Meetings in Leading MENASA Cities



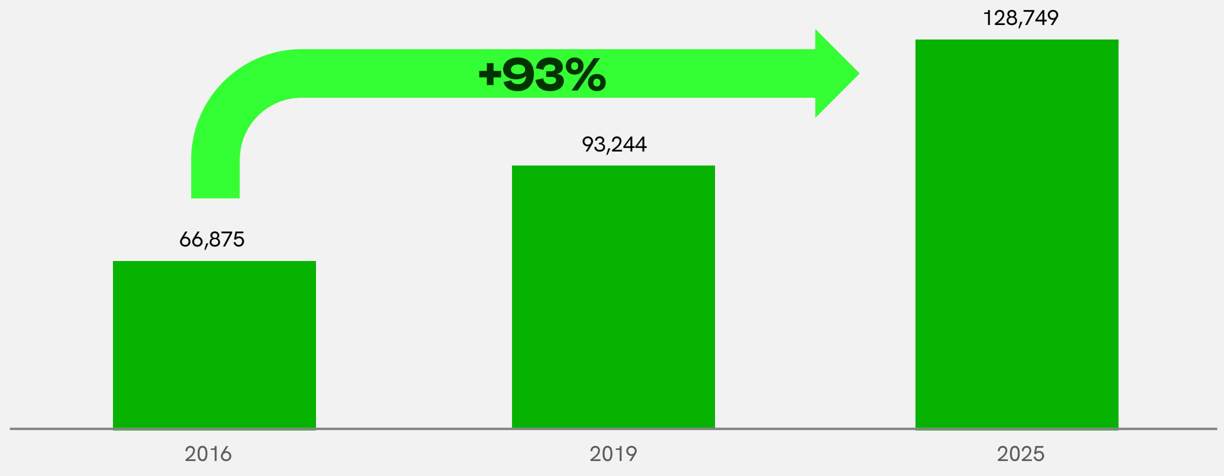
Source: ICCA 2026

REGIONAL OUTLOOK: MIDDLE EAST

The Middle East accounts for 2% of international and regional association meetings globally, a share that has changed little in recent years. However, the region stands out more for the scale of its meetings than their number. ICCA data show that meetings held in the Middle East attracted an average of 532 delegates in 2025, the highest of any region and 32% above the global average of 403.

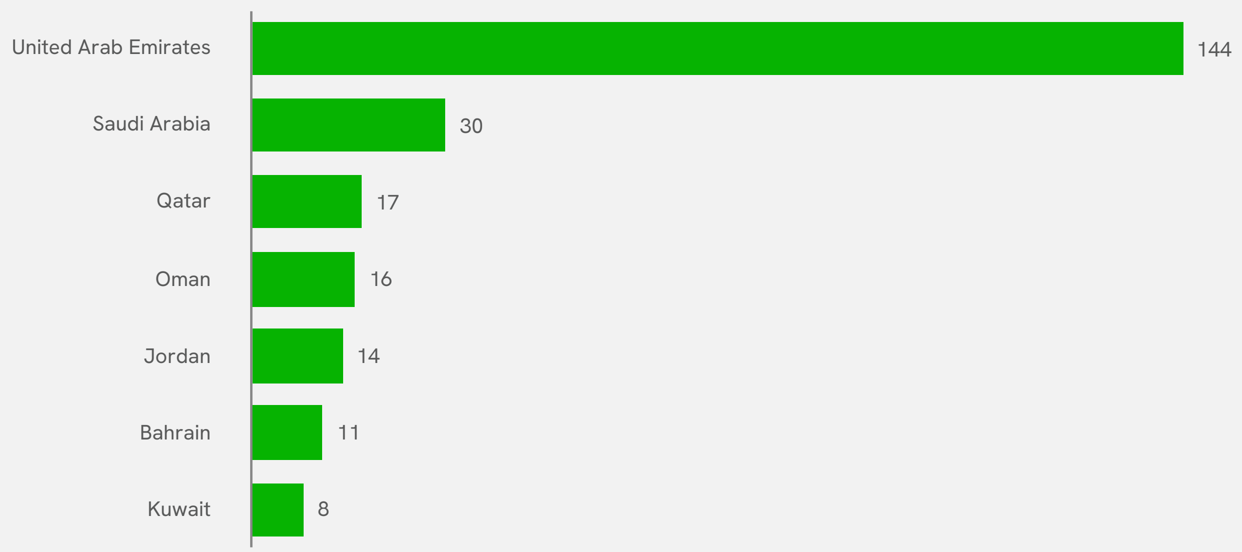
Between 2016 and 2025, the number of meetings hosted in the Middle East increased 33%, while total participation increased 93%, from 66,875 to 128,749. This indicates that growth has been driven more by larger events than by increased meeting volumes, highlighting the region's strength in hosting major congresses alongside scope to attract a greater number of events.

Middle East Association Meetings Participation



Source: ICCA 2026

2025 Volume of Association Meetings in Leading Middle East Markets



Source: ICCA 2026

The United Arab Emirates remains the Middle East's largest market, hosting 144 meetings in 2025, close to 60% of the regional total of 242. Most of this activity is concentrated in Dubai (88) and Abu Dhabi (47). Saudi Arabia hosted 30 meetings, a modest volume relative to the scale of its venue development programme. The gap between venue capacity and the number of meetings won can partly be explained by the three-to-seven-year bidding cycles for association congresses, meaning capacity added since 2020 may not yet have been utilised to host these events. A second tier of markets, comprised by Qatar (17), Oman (16), Jordan (14) and Bahrain (11), depend closely on a single national venue for their meeting activity.

In exhibitions, the Middle East has strengthened its position against a broader decline in rented exhibition space. UFI's Global Exhibition Industry Statistics, published in April 2026, show that net exhibition space rented declined across every global region between 2019 and 2024/2025 except the Middle East, where it grew by an average of 0.9% a year. Globally, rented exhibition space fell from 143.7 million to 138.0 million square metres over the same period.

Although the Middle East and Africa together account for just 4.4% of global indoor exhibition capacity, the Middle East's recent growth reflects continued investment in and development of its business events sector.

According to UFI, exhibitions in the Middle East generated €3.8 billion ($4.4 billion) in total output and supported 49,800 jobs in 2025, attracting 6.7 million visitors and 143,000 exhibiting companies across 3.3 million square metres of booth space. The capacity behind this activity continues to expand, with accredited exhibition space in Saudi Arabia growing substantially since 2018 and Dubai's principal venue entering a phased expansion programme.

An important question is how quickly the region can fill this additional capacity with recurring events. Encouragingly, attendance at established large-scale shows, including LEAP in Riyadh; ADIPEC in Abu Dhabi; and GITEX Global, Gulfood and Arab Health in Dubai, is comparable with that of major international exhibitions in Europe and Asia. UFI also reports that the region has the highest exhibition visitor Net Promoter Score, at +35, indicating its newer venue stock may be contributing to a stronger visitor experience and increased willingness to return.

The Middle East is the only global region to achieve growth in net exhibition space rented between 2019 and 2024/25.

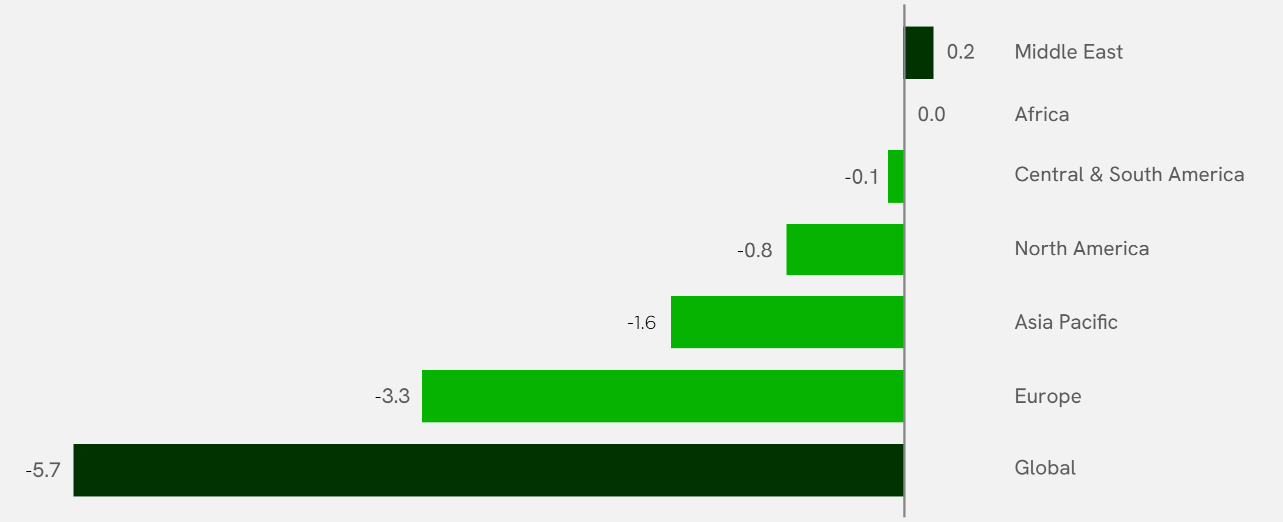
Source: UFI 2026

Saudi Arabia's accredited exhibition space increased over **200%** between 2018 and 2025, from nearly **94,000** to over **300,000** square metres.

Source: Saudi Conventions and Exhibitions General Authority 2025

Change in Net Exhibition Space Rented

(2024/2025 vs. 2019, million m²)

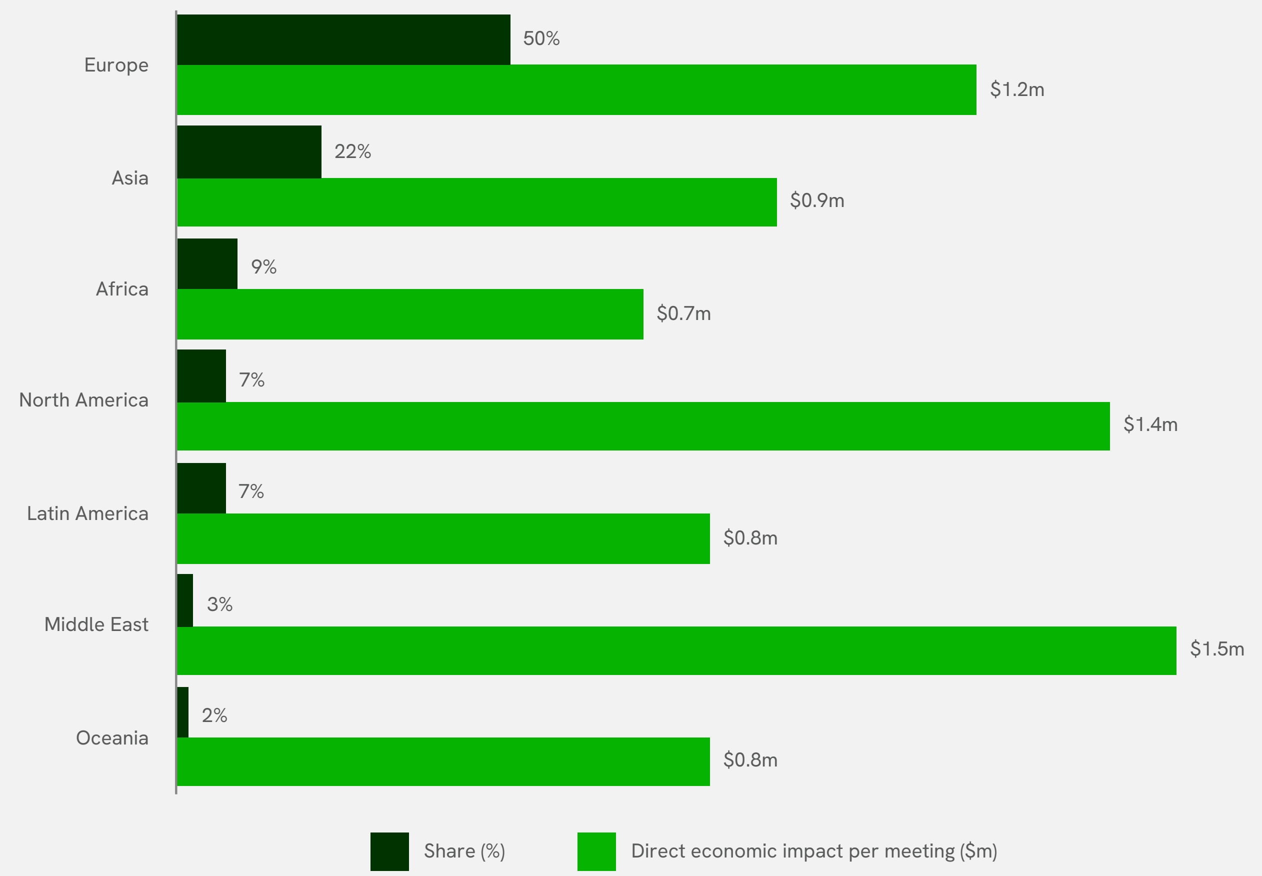


Source: UFI 2026

As with association meetings, the Middle East hosts relatively few government meetings, but those it attracts generate significant value. The Middle East hosted just 2.6% of tracked government meetings in 2025 but recorded the highest average economic value per meeting of any region at approximately $1.5 million, compared with $1.4 million in North America, $1.2 million in Europe, $0.9 million in Asia and $0.7 million in Africa.

These meetings are generally held where international organisations are headquartered, and the Middle East hosts relatively few permanent headquarters. Its share of meeting volume is therefore small compared with Europe, which leads globally. However, government meetings hosted in the Middle East tend to be larger and involve more senior participants. Destinations without permanent institutions typically access this segment by holding rotating presidencies or hosting summits, both of which the Middle East has consistently secured.

2025 Share & Direct Economic Impact of Government Meetings



Source: ICCA 2026

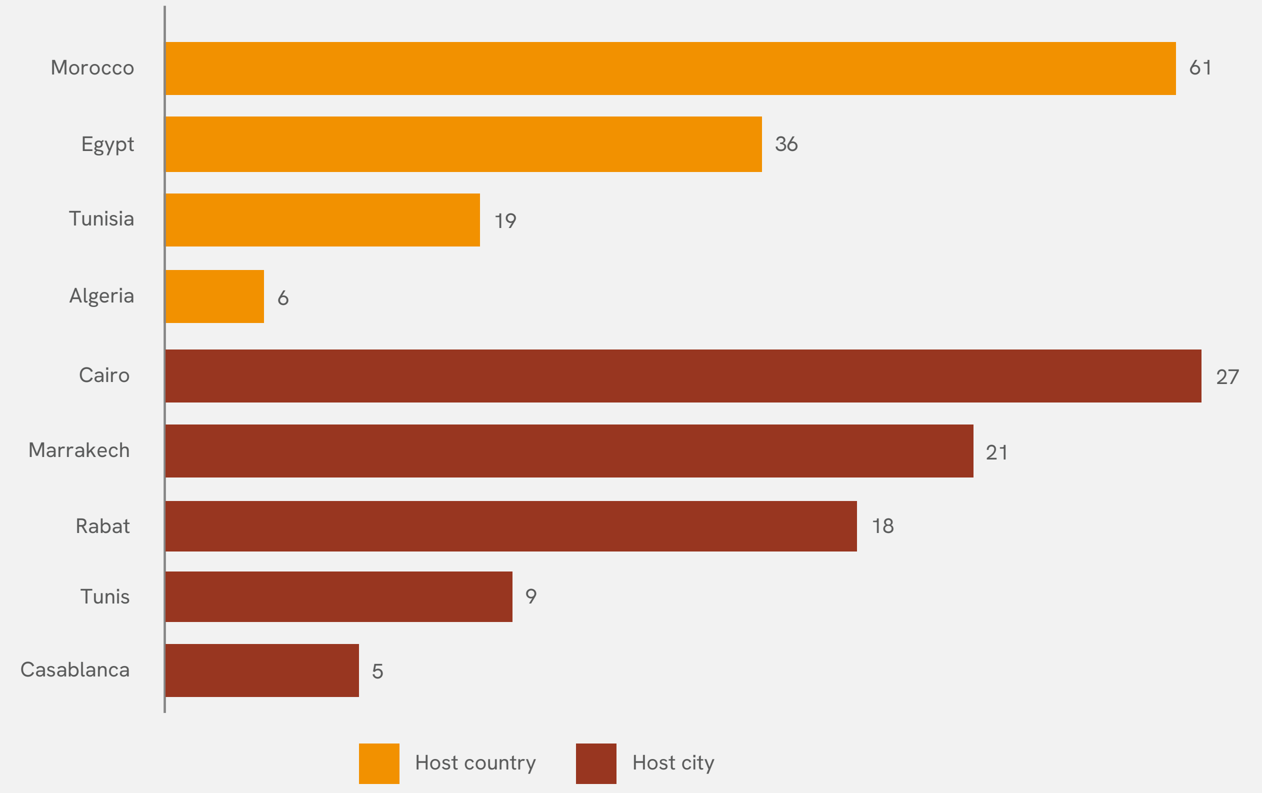
The Middle East leads in average association meeting size and government meeting value, and is the only region to have recorded growth in rented exhibition space, highlighting its strength in hosting large-scale, high-value events.

Source: ICCA 2026

REGIONAL OUTLOOK: NORTH AFRICA

Morocco hosted the largest number of association meetings in North Africa in 2025, with 61, followed by Egypt (36), Tunisia (19) and Algeria (6). Its activity is spread across several centres, including Marrakech (21), Rabat (18), Casablanca and Tangier, reflecting a multi-city conference economy. By contrast, Egypt's activity is predominantly centred on Cairo, which hosted 27 meetings.

2025 Volume of Association Meetings in Leading North Africa Markets



Source: ICCA 2026

Government meetings are proportionally more important to North Africa than other MENASA regions. Egypt alone recorded 26 tracked government meetings in 2025, and the sub-region's wider profile is supported by sustained institutional and multilateral activity in development, health, climate and agricultural policy. As government meetings follow established institutional relationships, they provide a more stable base of activity than association congresses, which are awarded through competitive rotation. They therefore represent an important opportunity for markets – such as those in North Africa – with modest association meeting pipelines.

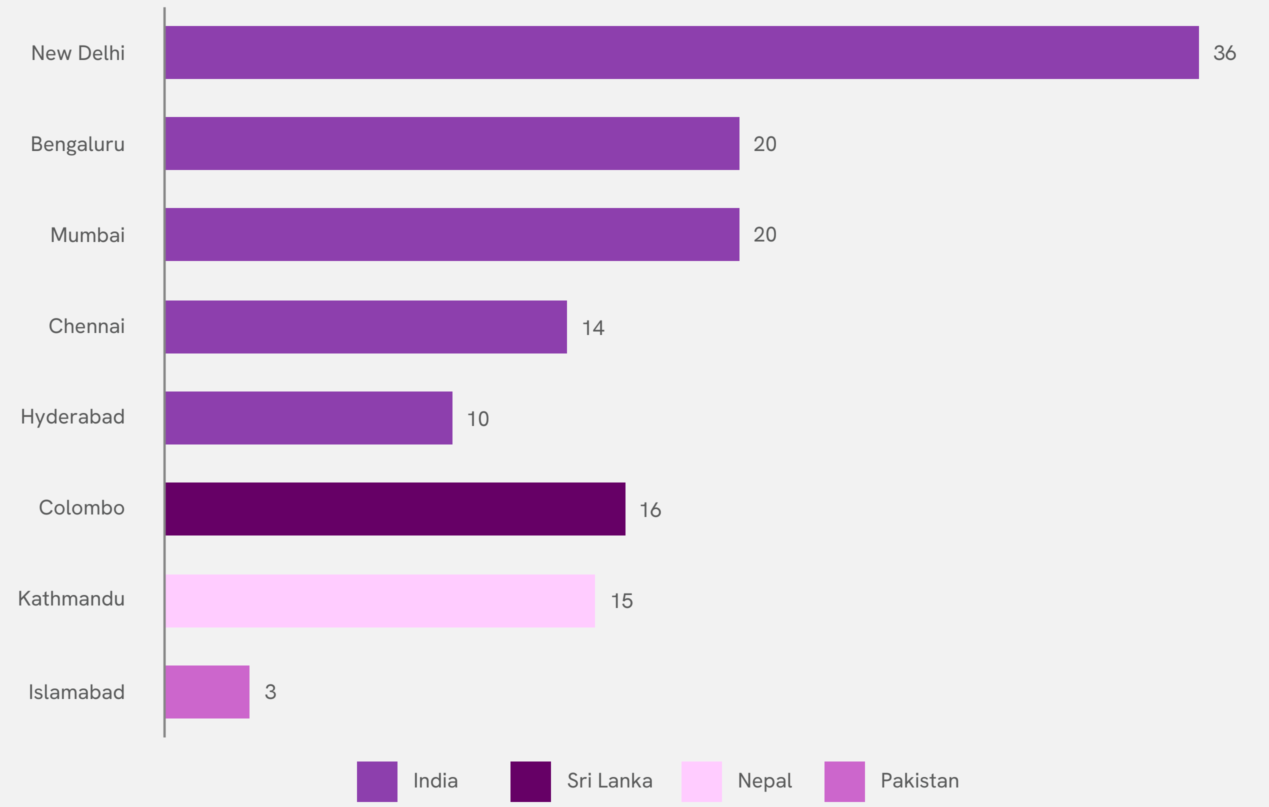
North Africa forms part of the Middle East and Africa grouping, which accounts for 4.4% of global indoor exhibition space. Egypt's principal exhibition centre in Cairo is the sub-region's largest single facility, while venues in Casablanca and Marrakech serve a mix of domestic and regional trade activity. However, the limited availability of internationally accredited venue capacity appears to be constraining growth. No venue in Egypt, Morocco and Tunisia exceeds 50,000 square metres, and 61% of the sub-region's association meetings are concentrated across only four cities: Cairo, Marrakech, Rabat and Tunis.

REGIONAL OUTLOOK: SOUTH ASIA

South Asia's meetings activity is heavily concentrated in India, which accounted for roughly three-quarters of the sub-region's association meetings in 2025. Within India, however, activity is more widely distributed than elsewhere in MENASA: New Delhi hosted 36 meetings, followed by Mumbai and Bengaluru with 20 each, Chennai with 14 and Hyderabad with 10. This spread reflects India's broad, multi-city research and industry base.

In 2023, India's venue capacity expanded significantly with the opening of two major convention facilities in New Delhi, one of which ranks among Asia's largest by floor area. As in the Middle East, long bidding cycles mean the impact of these new venues on hosted meeting volumes is likely to become apparent during the second half of the decade.

2025 Volume of Association Meetings in Leading South Asia Cities



Source: ICCA 2026

Elsewhere in the sub-region, markets are small but established. Colombo (16 meetings) and Kathmandu (15) recorded activity comparable with mid-sized Indian cities but accounted for virtually all the meetings held in Sri Lanka and Nepal, respectively. Pakistan hosted eight meetings, led by Islamabad, reflecting an early-stage market where limited purpose-built capacity and international air connectivity may constrain growth.

India is also South Asia's only major participant in government meetings, with 40 tracked events placing it 19th globally, according to ICCA. Its position reflects multilateral and regional bloc activity rather than the presence of institutional headquarters, suggesting that rotating presidencies could offer a similar route into this segment as for other MENASA markets without standing institutions.

South Asia's exhibition activity is likewise centred on India, spanning New Delhi's venues and established centres in Mumbai and Bengaluru. The sub-region sits outside the largest capacity blocks measured by UFI, while its exhibition growth is driven primarily by domestic demand rather than international rotation. This contrasts with the Middle East, where a substantial share of exhibition activity is internationally sourced.

ECONOMIC FOOTPRINT OF BUSINESS EVENTS

ICCA's delegate expenditure data show average spending of $2,708 per delegate per meeting in 2025, up 22% from $2,214 in 2016, based on an average meeting duration of approximately three and a half days. The increase has largely occurred in recent years; spending remained broadly flat between 2016 and 2019, at $2,205, before rising during the post-COVID recovery period to $2,644 in 2024 and $2,708 in 2025. Most of this spending accrues to businesses in the host city rather than to the event organiser, with accommodation accounting for 31%, registration for 22%, and the remainder covering food and beverage, local transport and other in-destination spending.

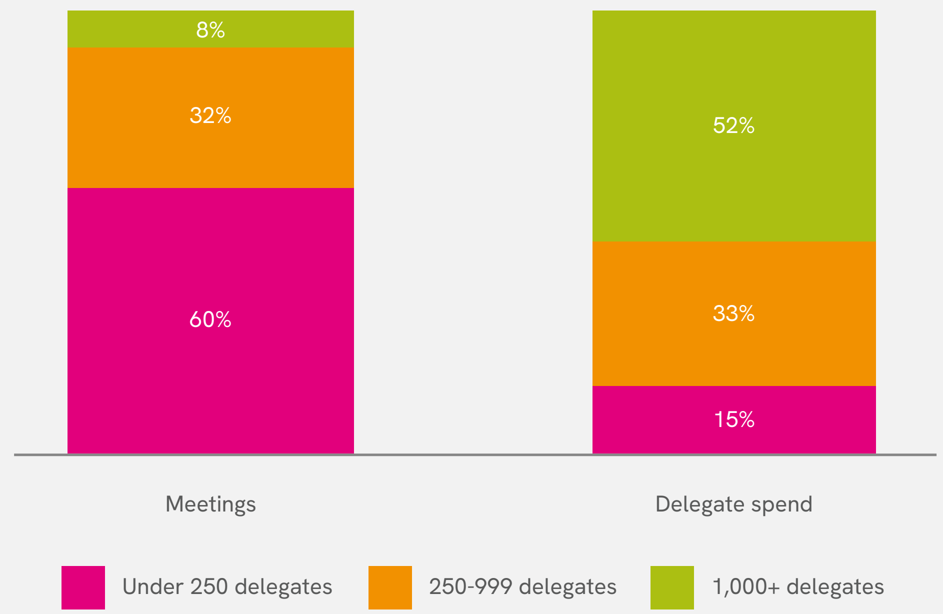
2025 Average Spend & Spend Category Share Per Association Meeting Delegate

$2,708 per delegate (+22% vs. 2016)

Source: ICCA 2026

The economic footprint of association meetings varies significantly by event size. Meetings with 1,000 or more delegates represent just 8% of all association meetings but account for 52% of total delegate spending, while meetings with fewer than 250 delegates comprise 60% of events but generate only 15% of spending. Although large congresses offer greater value, they are contested by a limited number of cities with the requisite capacity. In contrast, the mid-sized segment of 250 to 999 delegates, accounting for roughly a third of both events and spending, is more accessible and offers a more consistent pipeline. Destinations that build exclusively for the largest events therefore risk competing in the narrowest segment of the market.

2025 Share of Meetings & Delegate Spend By Meeting Size

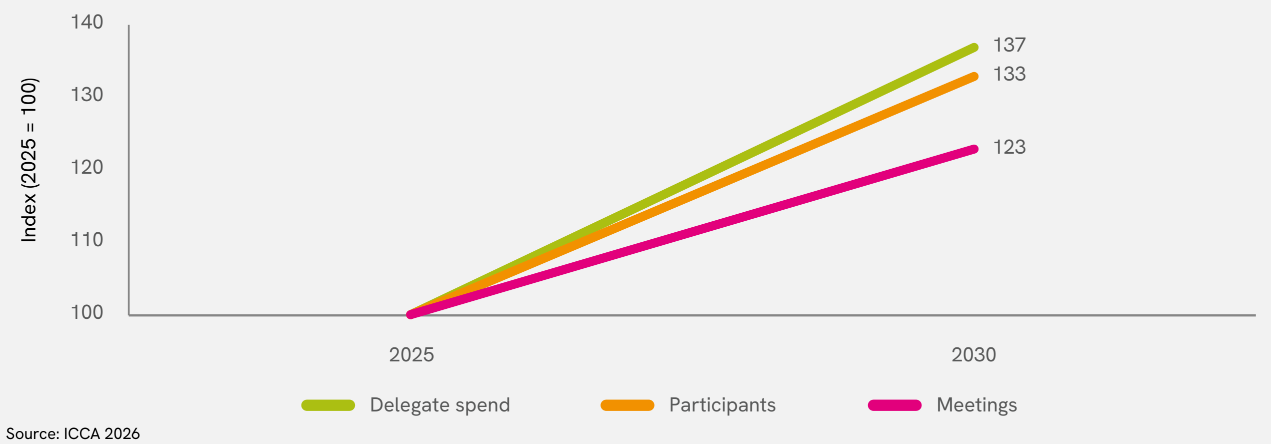


Source: ICCA 2026

OUTLOOK TO 2030

ICCA forecasts that the number of international association meetings will exceed 15,000 annually by 2030, attracting nearly seven million participants and generating an estimated US$18.5 billion in direct delegate spending. This represents growth of 23% in meetings, 33% in participants and 37% in spending compared with 2025. Spending is therefore expected to grow faster than event volumes, reflecting a shift towards larger events and higher expenditure per delegate, and favouring destinations capable of hosting meetings at the upper end of the size distribution.

2030 Global Association Meetings Forecast
(Indexed to 2025)



Source: ICCA 2026

By 2030, the global association meetings market is expected to exceed 15,000 meetings and attract nearly 7 million participants, generating close to
$18.5 billion
in delegate spending.

Source: ICCA 2026

A pipeline of large-scale events has been confirmed across the MENASA region for the remainder of the decade and beyond. These include the AFC Asian Cup in 2027, the IMF and World Bank Annual Meetings in Abu Dhabi in 2029, Expo 2030 in Riyadh, the 2030 Asian Games in Doha and the 2034 FIFA World Cup in Saudi Arabia. Events of this scale are often accompanied by additional venue capacity, transport upgrades and greater international visibility. However, evidence of their long-term effect on association meeting volumes remains mixed and depends largely on whether host destinations sustain their bidding activity after the event. The clearest legacy effects tend to occur in destinations with an established and active convention bureau.

Several other factors will shape how growth is distributed. These include the pace at which recently added capacity in the Middle East and South Asia converts into hosted events, given bidding cycles of three to seven years; the growing role of sustainability criteria in venue selection, reinforced by industry initiatives such as Net Zero Carbon Events, which has attracted more than 500

signatories; and visa policy, aviation connectivity and regional stability, all of which remain material considerations for congresses with globally distributed memberships.

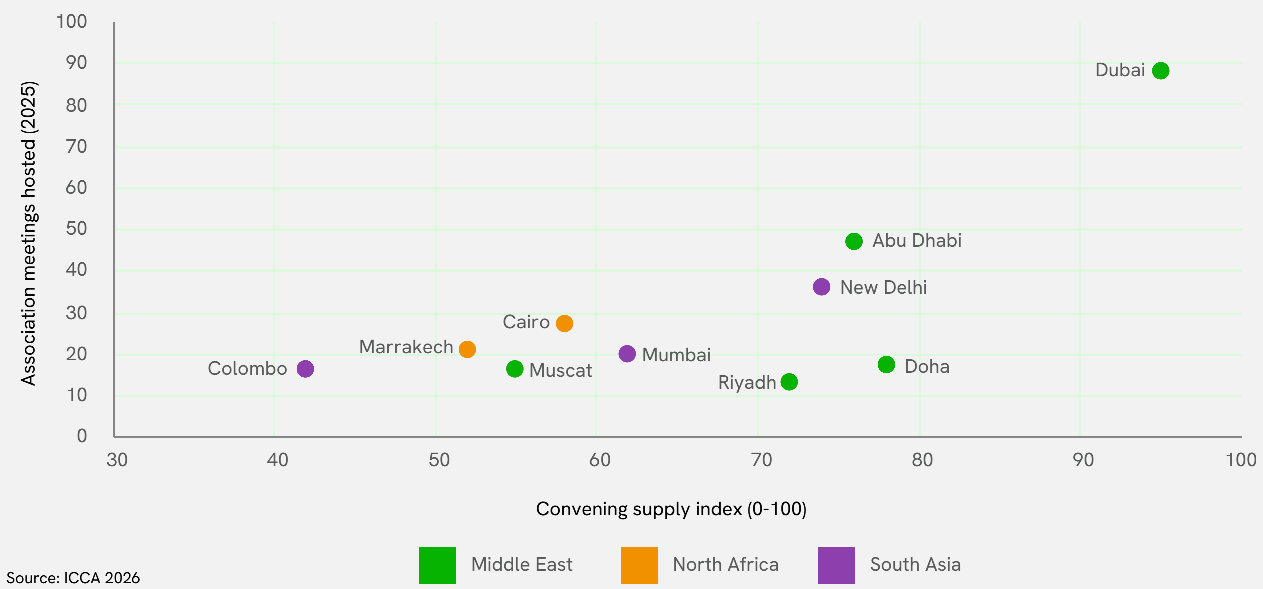
Destination positioning can be assessed by comparing the supply of convening infrastructure with realised demand. The chart below plots an ICCA composite supply index, combining venue capacity, hotel supply and international air connectivity on a scale of 0 to 100, against the number of association meetings hosted by each city in 2025.

Dubai converts its strong infrastructure base into high event volumes, reflecting its established position in the association meetings market and a relative balance between supply and demand. By contrast, Doha (index score: 78; 17 meetings), Riyadh (72; 13) and Abu Dhabi (76; 47) occupy the lower-right quadrant, suggesting that capacity has been built ahead of current demand. Meanwhile, New Delhi and Cairo host more meetings than their infrastructure scores alone would predict, indicating that institutional depth and bidding capability can partly offset supply constraints.

A calendar of anchor events will drive MICE activity across MENASA over the coming decade, including mega-events and flagship international gatherings such as the World Bank Group and IMF Annual Meetings in Abu Dhabi in 2029 and Expo 2030 Riyadh.

Source: ICCA 2026

Convening Supply & Demand in MENASA
(Selected Cities)



Source: ICCA 2026

8. AI & Digital Innovation in the Middle East: Case Studies

Technology underpins every stage of the travel experience. Travellers rely on digital platforms for inspiration, information, booking and instant support before, during and after their trips. They also share their experiences online, providing inspiration and trusted information for other travellers. Emerging AI-powered technologies are enhancing these benefits by simplifying search, delivering more tailored recommendations, improving customer support and enabling smoother transactions.

For travel businesses, increasingly powerful digital tools and AI are improving efficiency and creating opportunities to deliver more personalised and engaging guest experiences at scale. Advances in predictive analytics are enabling businesses to anticipate behaviours and trends more accurately, supporting better-informed decision-making, product development and improved profitability. Alongside this, travel organisations are increasingly using real-time data and automated systems to provide a more tailored service to optimise operations and enhance the customer journey.

Agentic AI is a major focus of current technological development. Moving beyond content generation and recommendations, it can perform tasks autonomously and create new efficiencies. It is already automating key functions such as searching, booking, issuing refunds and resolving service requests.

To better understand the opportunities created by emerging AI-powered tools and technology solutions in travel, Tourism Economics spoke with executives from leading organisations at the forefront of innovation. They shared their perspectives on the Middle East's strategic advantages across the travel and technology landscape. Together, these case studies demonstrate the rapid evolution of digital tools within the industry and the region's leading role in technology adoption and innovation.

Nearly one in five travellers used an AI chatbot when planning or booking their last international trip.

Source: Tourism Economics 2025

Around three quarters of travel experts believe AI is beneficial for the industry, up from two-thirds in 2024.

Source: Tourism Economics 2026

More than 60% of travel companies are already experimenting with or scaling agentic AI, and 62% expect higher technology budgets in 2026.

Source: Tourism Economics 2026

Priorities Shaping the Future of Travel Technology

The following case studies highlight AI as a core strategic pillar of operations and product development. They also reveal five key themes that underscore the growing importance of technology and define practical priorities for travel businesses seeking to remain competitive.

Simplifying the Travel Ecosystem

The industry must tackle fragmentation as disconnected systems, integrations and data sources increase operational costs, create security risks and limit understanding of the customer. Technology providers are responding by absorbing complexity on behalf of suppliers and buyers – bringing content, connectivity and booking flows into more unified environments. For travel companies, the opportunity is to simplify their technology stacks, improve data visibility and unlock revenue through more seamless customer experiences.

Preparing for the Agentic AI Economy

Preparation for agentic AI must begin now. AI already powers pricing, fraud detection, payment optimisation, forecasting, personalisation and customer service. The next shift will see agentic systems move beyond recommending actions to autonomously executing tasks. Several companies already have live products in market, signalling this is moving from concept to commercial reality. Businesses that structure, consolidate and standardise their data today will be best placed to participate in this emerging AI-driven economy.

Primed for Technology Adoption: The Middle East

The Middle East's distinctive strengths form another important theme. Ambitious national visions, substantial investment and a willingness to leapfrog legacy systems position the region a natural environment for rapid technology adoption. Yet international scale does not guarantee local success. Companies must earn trust through regional teams, local-language support, relevant payment options and solutions to market-specific friction points, including visa and documentation requirements.

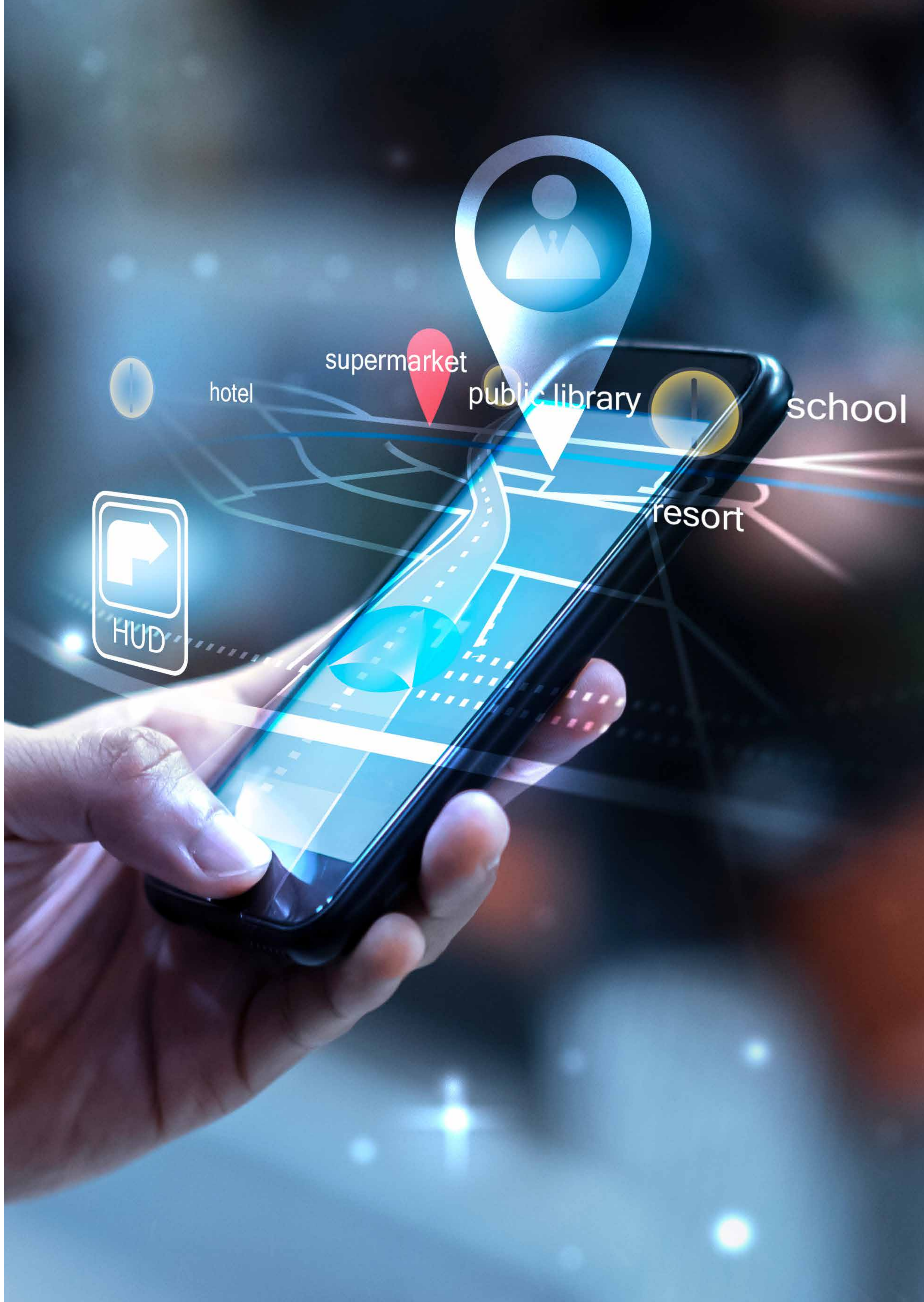
Technology-Enabled Disruption Mitigation

Technology is also becoming increasingly important to resilience. The travel industry has repeatedly recovered from major disruption, supported by its ability to adapt pricing, inventory, policies and communications quickly. The pace of recovery has improved over time, aided by positive policy reactions, but increasingly complex disruptions in an inter-connected world are providing new challenges. Agentic AI development can help businesses respond with even greater speed, precision and coordination.

Importance of Human-Centred Automation

Greater automation will not diminish the importance of human connection as trust remains critical to the sector. Technology can remove friction from routine, high-volume processes such as booking changes, cancellations and policy enquiries. This allows people to focus on the interactions where judgement, empathy and relationship-building matter most. As automation increases, effective human oversight and governance will be essential to building and maintaining trust among travellers.

The case studies that follow explore how leading organisations are putting these ideas into practice and what their experiences reveal about the future of travel.



amadeus

Based in Dubai, Maher leads Amadeus' Travel Unit, shaping and delivering the company's strategic vision across the diverse and dynamic markets of Europe, the Middle East, and Africa (EMEA).

One connection to the travel ecosystem, powered by trusted data

The travel industry operates across a fragmented technology landscape, with airlines, hotels and other travel providers often relying on disconnected systems that make it difficult to optimise distribution. Amadeus helps address this challenge by connecting travel providers, sellers and travellers through an integrated platform that brings together offers, orders, availability and traveller data at scale.

Altéa, Amadeus' flagship passenger service system for full-service airlines, extends this role within the aviation sector. It provides an integrated solution across the passenger journey, covering reservations, inventory management, ticketing and departure control - from check-in and boarding to baggage handling. Altéa supports more than 200 airlines worldwide and processes over one billion passengers each year.

Artificial intelligence is a core strategic pillar for Amadeus as it continues to develop its range of travel solutions. AI is applied across three key areas: traveller-facing interactions, from search through to post-booking support; operational processes, including pricing and disruption management; and strategic decision-making powered by advanced analytics.

Training models and advancing AI depends on access to vast amounts of high-quality data. By processing millions of searches and bookings each day, Amadeus has the data foundation needed to develop and deploy AI-powered solutions across the travel industry.

Strategic partnerships with global technology leaders, including Microsoft and Google, further support Amadeus' efforts to accelerate innovation and develop AI-enabled solutions for the travel ecosystem.

> **"Amadeus' ability to operate at scale, handling high transaction volumes and large datasets, enables the practical deployment of AI and advanced technologies in real-world environments worldwide."**
>
> *Maher Koubaa, Executive Vice President Travel Unit and Managing Director Europe, Middle East and Africa (EMEA), Amadeus*

Middle East: Building digital-first from the ground up

The Middle East is an increasingly important region for Amadeus, driven by rapid aviation growth and significant investment in digital transformation. Much of this transformation is embedded in new projects from the outset, rather than focused on upgrading legacy systems. A key priority is improving connectivity between systems and delivering more integrated digital travel experiences for clients.

Through its partnerships, Amadeus aligns its global technology expertise with the region's growth ambitions, including Saudi Arabia's Vision 2030, to build scalable, future-ready travel infrastructure.

In Saudi Arabia, Amadeus is supporting Saudia, the national airline, in its transition towards simpler, end-to-end retailing through the airline's next-generation retailing system, Nevio. Low-cost carriers across the region are also expanding their use of Amadeus technology. Air Arabia selected Amadeus as its ground-services technology provider, while flyadeal signed an Amadeus-powered distribution agreement giving travel agents worldwide access to more than 200 daily flights serving over 30 destinations.

Responsible AI and connected ecosystems shaping the next decade

Maher Koubaa, Executive Vice President Travel Unit and Managing Director EMEA at Amadeus, sees connected platforms, personalised experiences and AI-driven automation as key forces shaping the future of travel.

He explains that Amadeus is focused on harnessing AI responsibly, securely and at scale, supported by trusted data and robust governance to create value while maintaining industry and traveller trust.

Maher views the Middle East as an important market for applying this approach, with government ambition, infrastructure development and growing travel demand enabling advanced technologies to be tested, adopted and scaled from the outset.

> **"Amadeus sees significant long-term growth potential, driven by the continued expansion of global travel demand, the industry's shift toward connected digital ecosystems, and the increasing importance of AI and data."**
>
> *Maher Koubaa, Executive Vice President Travel Unit and Managing Director Europe, Middle East and Africa (EMEA), Amadeus*

Daniel Pombo
Senior Vice President, Business Development, HTS (Hopper Technology Solutions)

Based in the United States but with a global focus, Daniel leads the go-to-market strategy and commercialisation of Hopper's product suite and wider HTS platform.

Fintech layers and enterprise solutions building resilience for the travel industry

Flexibility is becoming an increasingly important part of the travel value proposition, creating opportunities for the industry to better meet traveller needs while generating new revenue. HTS (Hopper Technology Solutions), a leading travel technology platform, provides booking, financial technology (fintech) and loyalty solutions that help travel brands to meet growing demand for flexibility.

Founded 15 years ago in Canada as a consumer travel app, HTS is now predominantly a B2B business – serving partners across airlines, hotels, travel providers and credit card issuers. Partners access HTS's full range of products through a single, customisable travel booking ecosystem solution.

AI is central to HTS's fintech products. The technology is used to dynamically price products and generate contextual recommendations tailored to travellers, while automating post-booking operations such as disruption management.

Within the aviation sector, two flagship HTS solutions are gaining traction while reducing operational burden on airlines: Cancel for Any Reason, which facilitates flight tickets refunds, and Disruption Assistance for Any reason, which provides automated refunds and free rebooking when disruptions occur. These solutions offer travellers greater flexibility while helping airlines strengthen operational resilience in a changing market.

Middle East is leading the world in travel tech adoption

The Middle East is strategically important to HTS as the region hosts a growing number of travel companies eager to adopt the newest technologies, with low-cost carriers (LCC) such as Jazeera Airways and Flyadeal already using HTS's fintech solutions.

According to Daniel Pombo, Senior Vice President of Business Development at HTS, the Middle East is expected to become one of the fastest adopters of HTS technology, particularly when it comes to AI.

Growth in the Middle East is also being driven by rising regional travel demand, creating new opportunities for collaboration across the travel ecosystem, which is reducing the risk of fragmentation. Partnerships between technology providers, Destination Management Organisations (DMOs), flag carriers and hospitality groups are becoming increasingly important.

HTS's fintech products are well positioned to support both travel businesses and travellers as flexibility becomes increasingly important, particularly during periods of disruption. Daniel notes that adoption tripled during recent geopolitical tensions in the Middle East, as travellers sought greater flexibility for affected departures and future trips. This helped maintain customer satisfaction and strengthen relationships between travellers and brands during a period of uncertainty, supporting recovery and future growth.

> **"My expectation is that AI adoption in travel will happen faster in the Middle East than in many other regions. There is a genuine drive from governments and businesses to move from discussing AI to deploying it, and the region has the opportunity to leapfrog existing technologies and become a leader in AI-powered travel."**
>
> *Daniel Pombo, Senior Vice President, Business Development, HTS*

AI and travel tech will support increasing personalisation

Daniel sees the next decade being shaped by AI's growing role in contextual recommendations, personalisation and customer service. There is a major opportunity for HTS as it positions itself in AI-powered, customer-facing travel tools.

To capitalise on this opportunity, particularly in the Middle East, Daniel expects HTS to expand its local presence, strengthening commercial operations and scaling product development, customer support and delivery as its regional partner network grows.

> **"We are continuing to invest in AI where it can deliver real value. For example, AI helps optimise the relevance and impact of the media and advertising users see through contextual recommendations."**
>
> *Daniel Pombo, Senior Vice President, Business Development, HTS*

adyen

Camelia Lahlou
Vice President, Enterprise Sales, Adyen

Based in Dubai, Camelia leads Adyen's enterprise sales across hospitality and travel in the Middle East, working with hotel groups, airlines, OTAs and F&B operators.

Payments infrastructure supporting a more seamless travel experience

A major challenge for travel and hospitality companies is fragmentation across software platforms, payment systems, risk solutions and loyalty programmes. This creates friction in the customer experience and limits the ability to deliver personalised experiences.

Adyen's single platform addresses this challenge, bringing together key components of payment management, such as local and international payment methods, fraud protection, real-time reporting and loyalty – all into one solution. This enables travel businesses to replace multiple vendors with a unified, end-to-end system.

AI is deeply embedded across Adyen's platform, with models trained on trillions of transactions worldwide. Its focus on enterprise customers provides access to high volumes of payment data at a global scale, enabling its models to make more accurate decisions.

By analysing more than 250 payment risk signals in real time, the platform distinguishes genuine travellers from bots and fraudsters, reducing fraudulent bookings and chargebacks. This helps travel and hospitality businesses balance transaction conversion, fraud prevention and cost efficiency to improve financial performance.

> **"I see payments not just as a supporting function or peripheral. It's really a core infrastructure that powers resilience, enables scale and unlocks growth."**
>
> *Camelia Lahlou, Vice President, Enterprise Sales, Adyen*

Middle East hospitality as a driver of rapid technological adoption

The Middle East is a strategic region for Adyen, characterised by strong adoption of emerging technologies. Hospitality and travel businesses are implementing digital, mobile-first solutions, rather than upgrading legacy infrastructure, enabling new platforms to be deployed more quickly.

In high-volume, high-value markets such as the Middle East, travel organisations recognise that payments are more than just transactions, they are integral to the travel experience. A seamless payment journey can unlock new revenue opportunities and help deliver the premium experiences travellers expect.

Maintaining seamless payments at this scale is particularly important in luxury hospitality. Even a 1% improvement in authorisation rates can translate into millions in annual savings for hospitality groups, according to Camelia Lahlou, Vice President, Enterprise Sales at Adyen.

As the region continues to develop new tourism infrastructure, Camelia sees strong long-term demand for Adyen's technology. She remains optimistic about the region's outlook, reinforced by continued investment from international and local hospitality groups.

> **"The UAE is a real laboratory for hospitality, a place where new hospitality concepts and trends are constantly being tested. That's what makes it so interesting for technology companies like us. Across the UAE and the wider Middle East, there's greater flexibility and a velocity adopting new ideas."**
>
> *Camelia Lahlou, Vice President, Enterprise Sales, Adyen*

Agentic AI: Powering the next decade of travel

Looking ahead, Camelia expects agentic AI to increasingly manage bookings and traveller preferences autonomously. As these systems evolve, hyper-personalisation is set to become increasingly important too, with brands competing to tailor every aspect of the journey, from the offers travellers receive to the payment options available to them and the loyalty benefits they unlock.

These advances are only possible with clean, unified infrastructure. According to Camelia, the future of travel will be shaped by technology that operates seamlessly in the background, integrating payments and services to create effortless, personalised experiences for travellers.

sabre

Based in Bahrain, Ramzi leads the distribution, agency and travel solutions business for Sabre's META region – the Middle East, Africa, Türkiye, Pakistan and emerging markets.

Ramzi Al-Qassab
Managing Director, META, Sabre

AI native marketplace powering end to end travel retail

The travel industry has long struggled with fragmented data, content and systems, limiting its ability to understand customers, personalise offers and optimise end-to-end retail journeys. AI offers the potential to overcome this fragmentation to delivering seamless, modern retail experiences at scale.

Sabre operates one of the world's largest travel marketplaces, connecting airlines, hotels, agencies and other suppliers across 160 countries. Its B2B technology ecosystem processes 14,000 transactions per second and 11 billion shopping signals each month, data generated when travellers search for, compare or request information about flights, rooms or fares.

Rather than requiring partners to integrate separately with each content source, Sabre brings New Distribution Capability (NDC) content – which enables airlines to create and sell more relevant offers – together with traditional airline inventory, hotel and lodging options. This content is available within a single marketplace accessible through its application programming interfaces (APIs). This solution provides airlines, hoteliers, travel agencies and travel management companies with a single connection point for a broad range of travel products.

At the centre of this evolution is Sabre Mosaic™ Marketplace, Sabre's AI-native marketplace. Open and modular by design, Mosaic lets partners adopt only the components they need without requiring a full technology stack overhaul, lowering the barrier to adoption while drawing on one of the largest travel data cloud environments. For example, the platform's embedded AI layer, Sabre IQ, powers Lodging AI capabilities to help travel sellers deliver more personalised hotel recommendations, while its API-based architecture unifies fragmented lodging content sources behind the scenes.

Middle East momentum anchored by talent, scale and readiness

The Middle East is a strategic hub for Sabre, with its Middle East, Africa and Türkiye (META) division led from the region with teams across Gulf Cooperation Council (GCC) countries as well as in Lebanon and Iraq. Specialists in Abu Dhabi and Dubai support regional airline partners, including carriers such as Saudia, the national airline of the Kingdom of Saudi Arabia, and the region's newest national carrier, Riyadh Air, on personalised retailing modernisation. Sabre is therefore at the centre of a rapidly expanding aviation and tourism ecosystem.

Ramzi Al-Qassab, Managing Director for META at Sabre, explains that low-cost carriers (LCCs), such as Air Arabia and SalamAir, are expanding rapidly and processing growing transaction volumes through Sabre Mosaic, reflecting increasing adoption of next- generation retailing technology.

Ramzi notes that recent disruption has tested the region's travel sector, requiring airlines to respond quickly to operational challenges. Sabre has supported its airline partners in areas including schedule changes, refund management and customer communications. This operational resilience has been enhanced by Sabre's AI-native products, including intelligent chatbots, automated quality control and agentic AI solutions designed to improve efficiency and customer service. Sabre Mosaic Automation Manager, for example, can reduce agent handling time by up to 72% and servicing costs by 21%.

Agentic AI and retail modernisation setting the next agenda

As travel becomes more digital and personalised, Ramzi believes organisations that deliver the most relevant offers and seamless customer journeys will be best placed to compete.

Looking ahead, Ramzi sees agentic AI as essential for the travel industry, enabling travel providers to automate decisions, orchestrate workflows and deliver more seamless customer experiences. Momentum is already building around Sabre's agentic AI architecture, with 60 customers now in active pilot or production with projects set to help shape the future of the industry.

Combined with continued investment from governments, airlines and tourism authorities, Ramzi expects the Middle East to remain a global hub for travel innovation, with Sabre and its partners helping shape the next generation of digital travel experiences.

> **"The region is undergoing a period of unprecedented development. This momentum is reinforced by an influx of talent and strategic investors who are collectively accelerating this remarkable growth."**

Ramzi Al-Qassab, Managing Director, META, Sabre

Astrid Kastberg
Managing Director, RateHawk

RATE HAWK

Leading a global team from the company's regional hub in Dubai, Astrid heads RateHawk, the business-to-agent (B2A) service operated by Emerging Travel Group.

The consolidator model connecting a fragmented supply chain

For travel agents and online travel businesses, inventory sits with hundreds of separate suppliers, each with its own availability, pricing and rate types, so assembling a competitive trip means sourcing from several places at once. New technology, including AI solutions, can help to solve this issue of fragmentation.

RateHawk, a business-to-business (B2B) booking platform for travel professionals operated by Emerging Travel Group, was built to solve that problem for its more than 110,000 partners, including roughly 1,800 Application Programming Interface (API) partners across 120 countries.

RateHawk consolidates inventory from more than 350 suppliers and 250,000 direct contracted properties, forming what it describes as one of the industry's largest connectivity networks, into a single platform. Through one connection, partners can access over three million accommodation options alongside flights, rail travel, car hire and transfers.

This scale is only possible through technology. With hundreds of suppliers feeding into the platform, AI and machine learning help maintain speed and reliability, identifying bookings at risk of failure at an early stage. Meanwhile, real-time pricing reduces changes between search and confirmation, enabling higher conversion rates.

The platform is deliberately built to feel like a consumer site: RateHawk's view is that travel agents initially choose a supplier on price and support but stay for ease of use, which is why local, multilingual support teams sit alongside the automation, to ensure high value and trust.

> "We leverage AI and machine learning to optimise and become more efficient. Having more than 350 suppliers requires technology to enable additional capacity and efficiencies."
>
> *Astrid Kastberg, Managing Director, RateHawk*

An interdependent industry able to absorb disruption

RateHawk has operated in the Middle East for nearly seven years, with its regional headquarters in Dubai. According to Astrid Kastberg, Managing Director at RateHawk, the Middle East is a high-value, high-opportunity market, where bookings made by travel agency partners have an average transaction value around 50% higher than those made by individual travellers.

The recent regional disruption tested the industry's ability to adapt collectively, says Astrid. In a B2B ecosystem where clients are also suppliers, interdependence enables the industry to absorb shocks and keep demand flowing.

Geoeconomic instability is also making travellers more price-sensitive and risk-averse, contributing to later and more cautious booking decisions. Astrid says travel agents must adapt how they market and recommend travel options in response to this shift, supported by access to consolidated, reliable inventory.

> "There will always be something that disrupts yearly plans and requires pivoting. As an industry, we have such a huge dependency on each other that we figure out ways to overcome challenges."
>
> *Astrid Kastberg, Managing Director, RateHawk*

Human and automated distribution, growing side by side

Looking at key trends for the travel industry, Astrid points to the growing influence of social media, which is driving a new generation with rising spending power to make its own travel decisions. This shift is particularly strong in the Middle East according to Astrid.
Another major trend Astrid anticipates is the rise of agentic AI, which will increase the need for robust technology foundations. Moving beyond fragmented systems with partial or outdated information will be critical, with RateHawk's global supply network and resilient API infrastructure well positioned to support this transition.

As technology handles more routine processes, travel agents will be able to focus on the relationships, expertise and judgement that distinguish their role. Astrid expects the retail agent channel to continue growing, with automated and human led distribution evolving in parallel to serve distinct customer needs and strengthen the wider travel ecosystem. This combined approach will drive trust and higher value transactions.

Siddharth Sudhakar
General Manager, Trip.com MENA

Trip.com Group

Based in Dubai, Siddharth leads Trip.com's commercial strategy, market expansion, localisation and partnership development across the Middle East and North Africa (MENA).

A digital travel ecosystem, powered by AI grounded in real inventory

Travel requires navigating a series of difficult decisions. Trip.com Group, one of the world's leading travel service providers, has made it its mission to simplify every stage of the journey. Founded in 1999, Trip.com Group operates brands including Trip.com, Ctrip, Skyscanner and Qunar. Together, they serve travellers in more than 200 countries and regions, connecting them to flights, accommodation, car rentals, attractions and holiday packages through a single integrated ecosystem. Suppliers are therefore provided with scalable access to global demand, reducing the risks from industry fragmentation.

The platform has evolved from a transactional booking engine into an intelligent travel companion that supports customers before, during and after their trip. At the centre of this transformation is TripGenie, the Group's AI-powered travel assistant, which provides personalised recommendations, conversational trip planning, natural language search, multilingual support and proactive disruption management. Internally, it also enhances demand forecasting, revenue optimisation, fraud detection, marketing personalisation and operational efficiency.

According to Siddharth Sudhakar, General Manager for Trip.com Middle East and North Africa (MENA), a significant share of TripGenie's interactions revolves around helping travellers interpret travel products. For example, lounge access accounts for approximately 65 percent of pre-booking flight questions.

This demonstrates travellers' need for clarity, and highlights AI's important role in reducing uncertainty throughout the booking journey, which helps to build confidence. TripGenie's impact is already evident: AI-assisted order volumes on Trip.com have increased by around 400 percent year on year.

> **"Our objective is to simplify every stage of the customer journey, from inspiration and planning through to booking, servicing, and post-trip engagement, while creating value for both travellers and our industry partners"**
>
> *Siddharth Sudhakar, General Manager, Trip.com MENA*

The Middle East as a high-priority growth market

The Middle East is one of Trip.com's highest-priority growth markets and a key pillar of its global expansion strategy. Across the region, governments are positioning tourism as a central driver of economic diversification, with initiatives such as Saudi Arabia's Vision 2030, the United Arab Emirates' continued investment in aviation and hospitality, and Qatar's post-World Cup momentum creating significant long-term opportunities.

Trip.com has supported these ambitions through long-standing collaborations with tourism institutions and strategic partners across the region leveraging its global reach and data capabilities to drive inbound visitation from priority source markets.

Achieving deeper localisation in the region has required investment in Arabic-language capabilities, locally preferred payment methods, including through the recent Tamara and Tabby partnerships, and destination-specific content. Combined with global connectivity, this localised approach helps build confidence by presenting relevant options in a familiar and accessible way.

> **"The Middle East represents one of the most exciting travel markets globally because governments, airlines, hospitality companies, and technology providers alike are collectively investing in long-term tourism transformation"**
>
> *Siddharth Sudhakar, General Manager, Trip.com MENA*

The rise of seamless, agentic travel

Siddharth expects the next decade to be defined by fully integrated travel ecosystems, with hyper-personalisation becoming the industry standard – removing complexity for travellers rather than adding to it.

He believes AI will be central to this transformation, acting not simply as an automation tool but as an intelligent decision-support layer that helps travellers navigate complex choices, from fare rules and disruption management to personalised recommendations throughout their journey.

Siddharth explains that Trip.com and Mastercard are excited to showcase agentic travel transactions at ATM 2026, demonstrating how AI agents can securely transact on travellers' behalf and transform the trip planning, booking and payment experience.

Building on these capabilities, Siddharth sees growing potential for agentic travel experiences that enable customers to move seamlessly from inspiration and intent to booking within a single interaction. He views the Middle East as particularly well positioned to become one of the world's leading travel technology markets, supported by significant government investment, strong digital adoption and a growing appetite for innovation.

Tarik Fadil
Vice President, Supply, Agoda

Based in Dubai, Tarik leads Agoda's supply strategy and execution across EMEA, the Indian Subcontinent, Oceania and North America.

Connecting the whole travel journey through AI and localisation

Agoda is a leading online travel agency known for offering competitive deals across a wide range of accommodation options, flights and activities.

Headquartered in Singapore, the company employs more than 7,500 people and connects travellers to over 6 million properties, more than 130,000 flight routes and over 300,000 activities across more than 200 markets. Agoda's operations in the Middle East have grown in recent years, with the opening of three new regional offices, hosting over 100 employees.

While operating globally, it continually adapts its services to feel like a local online travel agency (OTA) in every market. With support for around 39 languages, nearly 100 alternative payment methods, and market-specific user experiences, the platform makes travel booking simpler and more seamless for its diverse global audience.

AI is playing a growing role in this mission, enhancing every stage of the customer journey, from pre-booking inspiration to post-booking support. For travellers and hotel partners alike, it improves search relevance and personalisation by highlighting the most useful images and organising reviews by topic. Further along the booking journey, it also streamlines payment and booking flows.

> **"We want the customer to have a local experience when they book with Agoda. We are the ones who need to adjust, rather than expecting the customer to adjust."**
>
> *Tarik Fadil, Vice President, Supply, Agoda*

Strategic destination and connectivity hub: The Middle East

The Middle East is an important region for Agoda, serving both as a major destination market and as a global connectivity hub linking Asia, Europe and Africa. Tarik Fadil, Vice President of Supply at Agoda, shared that domestic travel remained steady, based on Agoda's accommodation search data, as staycations continued to appeal to many residents in the Middle East. This helps support local economies and remains a consistent feature of the region's travel landscape.

Another of the region's key strengths, he explains, is the diversity of its offering - from desert landscapes and beaches to homestays, secondary cities and a wide range of activities. The region is also becoming an increasingly important hub for business travel and major corporate and sporting events.

As the Middle East continues to attract more visitors from Asia, Tarik sees growing opportunities to unlock new sources of demand and reach emerging traveller segments. Leveraging its strong presence across Asian markets, the company collaborates with tourism boards and destination partners to raise awareness and drive inbound travel.

Agoda's large traveller base in Asia and beyond makes it a natural partner for tourism boards. According to data.ai, Agoda was the most-downloaded and most-used OTA app in Asia, outside of China and the Middle East, between November 2024 and October 2025.

Meeting Asian traveller expectations through AI and localisation

Looking ahead, Tarik identifies two long-term priorities shaping Agoda's strategy in the Middle East: delivering an AI-powered travel experience and deepening localisation to better serve domestic, regional and international travellers from Asia and other global markets.

For many Asia-Pacific (APAC) travellers, visiting the Middle East involves a long-haul journey that requires advance planning, flexible policies, and reassurance at every stage. Tarik therefore highlights the continued development of AI-enabled capabilities and the need to adapt Agoda's offering to evolving expectations around flexibility, convenience, and peace of mind.

> **"The Middle East extends beyond traditional perceptions of luxury and five-star accommodation, representing a diverse destination landscape that encompasses a broad spectrum of travel experiences."**
>
> *Tarik Fadil, Vice President, Supply, Agoda*

Ross Veitch
Chief Executive Officer & Co-Founder, Wego

As Co-Founder and Chief Executive Officer of Wego, Ross leads the strategic direction and continued growth of a leading online travel marketplace in the MENA region.

The region's own travel marketplace, built for an age of AI agents

Wego is a travel technology company headquartered in Dubai and Singapore. Started in 2005 as a metasearch platform, the company now operates in more than 20 languages across 88 countries.

The company built its regional position by responding to a gap in the market. Although major travel suppliers in the Middle East were already selling online, there was no locally focused booking platform. Wego expanded its metasearch business before launching its own booking platform. Building on this core offering, the company has developed additional lines of business, including an advertising and media division serving tourism boards and airlines targeting the region, the WegoPro corporate travel platform, and WegoBeds, its business-to-business (B2B) hotel business.

Trip planning in the Middle East often begins with a question about visa requirements. To address this, Wego built a tool that reads a traveller's passport, residency status and existing visas to determine where they can go and how long the paperwork is likely to take. Destinations can then be compared on practicality as well as cost.

AI is central to the company's operations. Machine learning has been embedded for many years and adoption has accelerated sharply as the engineering team increasingly uses agentic workflows rather than developing processes manually.

The Middle East at the heart of the business

The Middle East anchors Wego's operations, supported by fast-growing corridors spanning India, Pakistan, Southeast Asia and Arab expatriate communities in Europe. The platform reaches approximately 100 million people a year.

Ross Veitch, Chief Executive Officer & Co-Founder of Wego, highlights several factors underpinning the region's effectiveness. Supply continues to expand, with new carriers entering the market and hotel capacity increasing across the Gulf. Competition among airlines and hotels is intense, creating favourable conditions for a marketplace model.

Demographics provide an additional advantage. The region's population skews young and is coming online quickly. Online penetration is expected to approach the levels seen in China, the United States and Europe, creating an environment in which new technology can scale quickly, including AI adoption.

Building the infrastructure for AI-powered travel

Ross expects the next major shift in travel to involve travellers delegating research, and eventually booking, to AI agents operating within parameters they define.

Wego is rebuilding its own surfaces around the same idea. Conversational and voice interfaces are being integrated into both the consumer app and the WegoPro corporate travel platform, enabling travellers to articulate their requirements rather than entering information manually.

Wego already offers services through virtual assistants that many travellers are using for trip planning, including ChatGPT and Claude, with further integrations planned. This is enabled by Wego's underlying infrastructure, including fast, self-documenting Application Programming Interfaces (APIs), Model Context Protocol (MCP) servers and command-line tools that AI systems can navigate more easily.

The company has also introduced stablecoin payments through its partnership with Triple-A, which Ross expects to become the standard approach autonomous agents settle transactions.

He is also optimistic about the broader trajectory of AI, expecting the technology to reshape economies and ultimately provide people with considerably more free time. Ross sees the Middle East as well positioned for this shift, supported by governments with a proven ability to drive significant change at pace.

> "Advancements in technology will result in people having more free time. I think anybody who's in a leisure-related sector will see a boom. Travel and tourism fits squarely into that camp."

Ross Veitch, Chief Executive Officer & Co-Founder, Wego

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 15 countries, including:

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

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

North Africa region

Group of countries according to geographical area encompassing the following 4 countries:

1. Algeria
2. Libya
3. Morocco
4. Tunisia

South Asia region

Group of countries according to geographical area encompassing the following 6 countries:

1. Bangladesh
2. India
3. Maldives
4. Nepal
5. Pakistan
6. Sri Lanka

MENASA region

Unless specified otherwise, data in this report is based on the aggregation of the Middle East, North Africa and South Asia, collectively described as MENASA.

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. This is calculated on an arrivals basis (from the perspective of the destination country). Includes intraregional 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 Travel

- 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

Tourism Economics, an Oxford Economics company, combines deep travel industry knowledge with rigorous economic tools to help clients make smarter marketing, investment, and policy decisions. The team delivers best-in-class forecasting, economic impact analysis, and consulting services for destinations, industry organizations, and corporations worldwide.

Oxford Economics is the world's foremost independent economic advisory firm. Covering more than 200 countries, 100 industrial sectors, and 8,000 cities and regions, we provide rigorous economic analysis and forecasting to empower leaders to make faster, more confident decisions in an uncertain world. With 450+ economists, strategists, and analysts across 20+ global offices, Oxford Economics serves more than 2,800 clients worldwide.

September 2026

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 2026

The ATM Travel Trends Report 2026 provides a forward-looking view of the trends, markets and traveller behaviours influencing our sector across the region and worldwide.

What's clear from this year's findings is that global demand for travel remains strong. Rising incomes, particularly in developing economies, are making travel more accessible to more people, with global propensity to travel projected to increase from 2.9 nights in paid accommodation per person in 2025 to 3.5 by 2030. Three-quarters of consumers actively prioritise travel experiences each year, underscoring the enduring importance of travel worldwide.

MENASA is particularly well positioned to capture this growth. International visitor nights across the Middle East, North Africa and South Asia are expected to rise almost 50% between 2025 and 2030, outpacing global growth of 37%. This will increase MENASA's share of global international nights to 23% by 2030, compared with 15% in 2019. Within the region, leisure arrivals to the GCC are forecast to grow by almost 9% annually through 2030, reflecting sustained investment in tourism infrastructure, connectivity, destination development and international marketing.

We're also seeing an important shift in what travellers want. More than half are increasingly interested in exploring new and lesser-known destinations, with this share rising to 68% among prospective MENASA visitors. At the same time, long-haul markets are creating opportunities for the Middle East. Leisure nights from China are projected to rise 160% between 2025 and 2030, while those from India are forecast to grow by 75%.

Luxury, experiences and events remain particular strengths for the Middle East. More than three-quarters of potential visitors to the region prioritise luxury, while interest in event-led travel is around 50% higher than among travellers considering other destinations. Business events are also contributing to this momentum, with association meeting attendance in the Middle East almost doubling between 2016 and 2025.

Importantly, MENASA's influence extends beyond inbound tourism. Outbound visits from the region increased by almost one-quarter between 2019 and 2025, supported by rising incomes and expanding air connectivity, reinforcing its position as an increasingly important source market for destinations worldwide.

As we look ahead, there is significant opportunity. Changing traveller expectations, new source markets and continued investment are reshaping the global tourism landscape, while MENASA is strengthening its position at the heart of this growth. ATM remains committed to supporting this evolution by bringing the global travel community together, sharing meaningful insights, and creating partnerships that will help build a more connected, resilient, and innovative future for travel.

Danielle Curtis
Regional Portfolio Director – UAE
RX Global

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DUBAI