

HOT FRONT LINE

SEP 2026 vs SEP 2025

The Gulf & its shores

▲ GROWTH
● FLAT
▼ DECLINE

01 · GULF CITIES

Seats: scheduled departing, Sept 2026 vs Sept 2025 (OAG) · Occ / ADR / RevPAR: latest published 2026 period

DUBAI -15.2% SEATS · SEPT YOY OCC ADR 67% -9%	ABU DHABI +9.8% SEATS · SEPT YOY OCC ADR 85% +10.4%	SHARJAH -2.6% SEATS · SEPT YOY OCC PAX '25 78% +13.9%
RIYADH +7.4% SEATS · SEPT YOY OCC REVPAR 48% -23%	JEDDAH +1.8% SEATS · SEPT YOY OCC REVPAR 66% -7%	DOHA -6.8% SEATS · SEPT YOY OCC ADR 60% -4.5%
MANAMA -31% OCCUPANCY YOY OCC PAX JUL 37% 712K	MUSCAT -2.4% SEATS · SEPT YOY OCC ADR 48% +1%	KUWAIT -25.6% SEATS · SEPT YOY OCC ADR 38% +3.2%

02 · ISLANDS & BEACHES

* TIO estimate

SAADIYAT 66% OCC · SUMMER	YAS ISLAND REC RECORD SUMMER	PALM JUMEIRAH \$313* NIGHT RATE	JUMEIRAH BCH -8%* ADR YOY	JBR & MARINA 65%* OCC	DOHA ISLANDS -4.5%* ADR YOY	SALALAH -28% OCC YOY
--	---	--	--	--	--	---

03 · DEPENDENT SHORES

September arrivals vs September 2025

MALDIVES -0.5% 148.8K ARRIVALS	SRI LANKA -0.3% 158.6K ARRIVALS	MAURITIUS +9.6% 114.5K ARRIVALS	SEYCHELLES +6.1% 30.9K ARRIVALS	PHUKET +11.8% GULF ARR. 321K	BALI -2.0% JAN-JUL 3.9M
---	--	--	--	---	--

04 · TOURISTS & WHO IS TRAVELLING

Official tourism statistics · latest published

DESTINATION	VISITORS	Δ YOY	PERIOD	SOURCE MARKET	SIGNAL	Δ YOY
Dubai	6.97M	-44.4%	Jan-Aug	China → Maldives	18.9% share · #1	+12.6%
Qatar	2.61M	+1.1%	9M · Sept 276k	Russia → Maldives	14.8% share	+16.8%
Saudi Arabia	inbound	-13%	2026 YTD	UK → Maldives	7.8% share	-17.9%
Maldives	1.57M	-3.9%	Jan-Sept	Germany → Mauritius	Q1 ledger	+50.3%
Sri Lanka	1.69M	-1.8%	Jan-Sept	India → Sri Lanka	51,931 · 32% of Sept	+10%
Thailand	22.18M	-3.7%	YTD	GCC → Dubai	16.3% of Jan-Aug	-46.1%
Bali	3.90M	-2.0%	Jan-Jul	W. Europe → Dubai	19.6% of Jan-Aug	-47.6%

Sources: Cavendish Maxwell GCC snapshot Jan-Aug 2026 · JLL UAE/KSA H1 · STR / CoStar · Dubai DET · GASTAT · Knight Frank KSA · Savills Oman · OAG Sept 2026 schedules · Dubai Airports · Hamad Intl · data.gov.bh · Maldives MoT · SLTDA · Statistics Mauritius · Seychelles NBS · TAT / CBRE Phuket · Bali Discovery. Seats = scheduled departing seats (OAG); occupancy / ADR / RevPAR = latest published 2026 period (H1-Aug, YoY). * TIO estimate from listed rates and channel checks. n/p = not published.