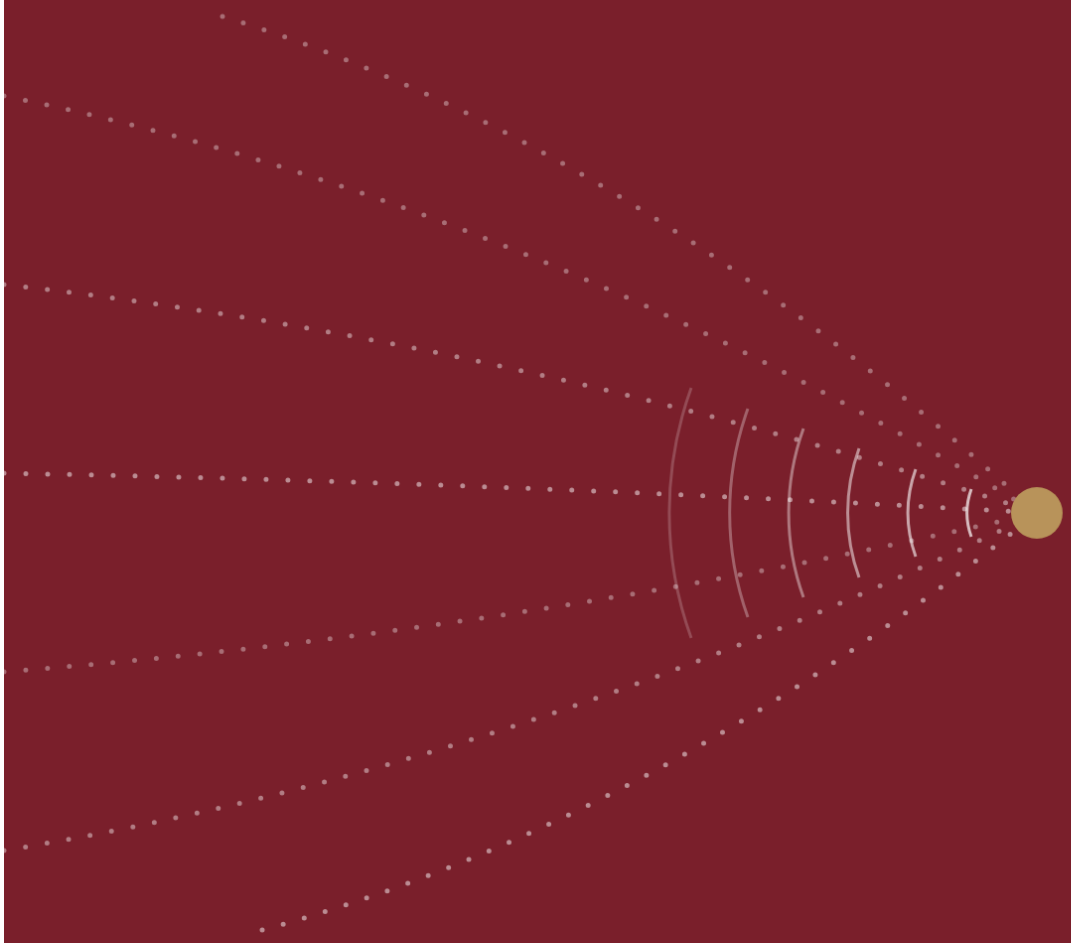
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POLICY PAPER · EPIC-PP-2026-037

The Visitor Economy

Tourism Strategy and the UAE

EPIC Research Team

October 2026

The Visitor Economy: UAE Tourism Strategy, Performance and Risk

What the national and emirate tourism authorities publish, how 2025 compares with the 2031 targets, and what the 2026 disruption shows, as of 30 October 2026

EPIC-PP-2026-037 · Economy & Energy · 30 October 2026 · EPIC Research Team

Abstract

Tourism sits near the centre of the UAE's diversification plans. The UAE Tourism Strategy 2031, launched on 11 November 2022, sets four headline targets: a tourism contribution to GDP of AED 450 billion, AED 100 billion in additional tourism investment, 40 million hotel guests, and an annual increase in the sector's GDP contribution of AED 27 billion (WAM 2022; UAE Government 2026). In 2025 UAE hotel establishments recorded about 32.34 million guests, according to the Ministry of Economy and Tourism (WAM 2026b). Dubai received 19.59 million international overnight visitors in 2025 at an average hotel occupancy of 80.7% (GDMO 2026a). Abu Dhabi reported 5.9 million hotel guests and occupancy of 81% (WAM 2026a). The World Travel & Tourism Council (WTTC), a private industry body, estimates that travel and tourism contributed 11.9% of UAE GDP in 2025 (WTTC 2026b). Then the picture changed. UAE airspace was partly closed on 28 February 2026 and regional conflict followed. Dubai received 6.97 million international overnight visitors from January to August 2026 and hotel occupancy fell to 36% in March (GDMO 2026b). This paper sets out what each authority publishes, for which period, and where the numbers fail to line up. It also records the status of the GCC unified tourist visa, which had been approved but not launched as of 30 October 2026.

Keywords: UAE; tourism; UAE Tourism Strategy 2031; Dubai; Abu Dhabi; hotel occupancy; international visitors; GCC unified tourist visa; WTTC; economic contribution

1. Introduction

Talk about UAE tourism routinely blurs measures that differ. "Visitors" in Dubai's releases means international overnight visitors. Abu Dhabi's headline "visitors" figure is wider than its hotel-guest count. The federal figure counts guests of hotel establishments in all seven emirates, so a guest who stays in two emirates may be counted twice. WTTC's GDP figures, by contrast, are modelled estimates from a private body and change with each annual revision.

This paper asks two questions. First, what do the official tourism authorities report for 2025 and for 2026 to date, and on what basis? Second, how far is the national sector from the targets of the UAE Tourism Strategy 2031, and what risks did 2026 expose?

The paper uses official releases of the Government of Dubai Media Office (GDMO) for Department of Economy and Tourism (DET) data, releases of the Department of Culture and

Tourism – Abu Dhabi (DCT Abu Dhabi) carried by the Emirates News Agency (WAM) and its own annual report page, federal releases on the Ministry of Economy and Tourism, the UAE Government portal, the GCC Secretariat General, UN Tourism and WTTC. Each figure is tied to its publisher and publication date, and third-party estimates are labelled.

2. The national strategy

The UAE Tourism Strategy 2031 was launched on 11 November 2022 as one of the "Projects of the 50" (WAM 2022). The UAE Government portal, updated on 21 October 2026, states that the strategy aims to raise the tourism sector's contribution to GDP to AED 450 billion, "with an annual increase of AED 27 billion", to attract AED 100 billion in additional tourism investment, and to welcome 40 million hotel guests (UAE Government 2026). At the launch the Vice President and Prime Minister set the hotel-guest goal "in 2031" and the GDP goal as AED 450 billion "of GDP in 2031" (WAM 2022).

The strategy contains 25 initiatives and policies and four key directions: a unified national tourism identity; specialised tourism products; tourism capabilities and the contribution of national cadres; and investment across tourism sectors (UAE Government 2026). It was prepared by the Ministry of Economy with federal and local bodies, the UAE's airlines and the World Tourism Organization, among others (WAM 2022). Neither source gives a baseline year or a method for measuring the GDP target, so this paper does not compare the AED 450 billion target with any measured value.

Abu Dhabi has its own Tourism Strategy 2030. DCT Abu Dhabi states that "double-digit growth in international overnight visitors" in 2025 placed the emirate "ahead of target" (DCT Abu Dhabi 2026). The page opened does not give the target values themselves. Dubai links its tourism growth to the Dubai Economic Agenda, D33 (GDMO 2026a).

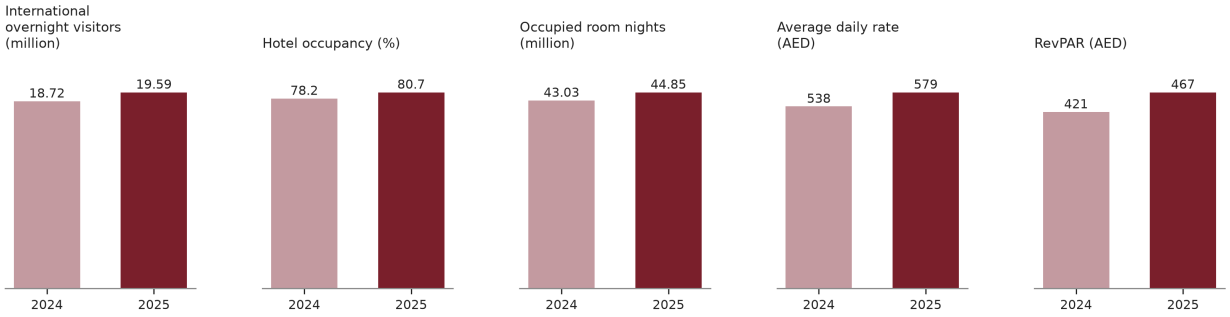
3. Dubai

3.1 Full year 2025

On 9 February 2026 the GDMO published DET's full-year data. Dubai received 19.59 million international overnight visitors in 2025, 5% more than the 18.72 million of 2024 (GDMO 2026a). December 2025 brought 2.04 million visitors, the first calendar month above 2 million.

Average hotel occupancy was 80.7% in 2025, against 78.2% in 2024. Occupied room nights rose 4% to 44.85 million from 43.03 million, and length of stay averaged 3.7 nights. The average daily rate (ADR) rose 8% to AED 579 from AED 538, and revenue per available room (RevPAR) rose 11% to AED 467 from AED 421 (GDMO 2026a). At the end of December the hotel inventory was 154,264 rooms in 827 establishments (GDMO 2026a). Figure 1 charts these indicators for 2024 and 2025.

Figure 1. Dubai visitor and hotel indicators, 2024 and 2025



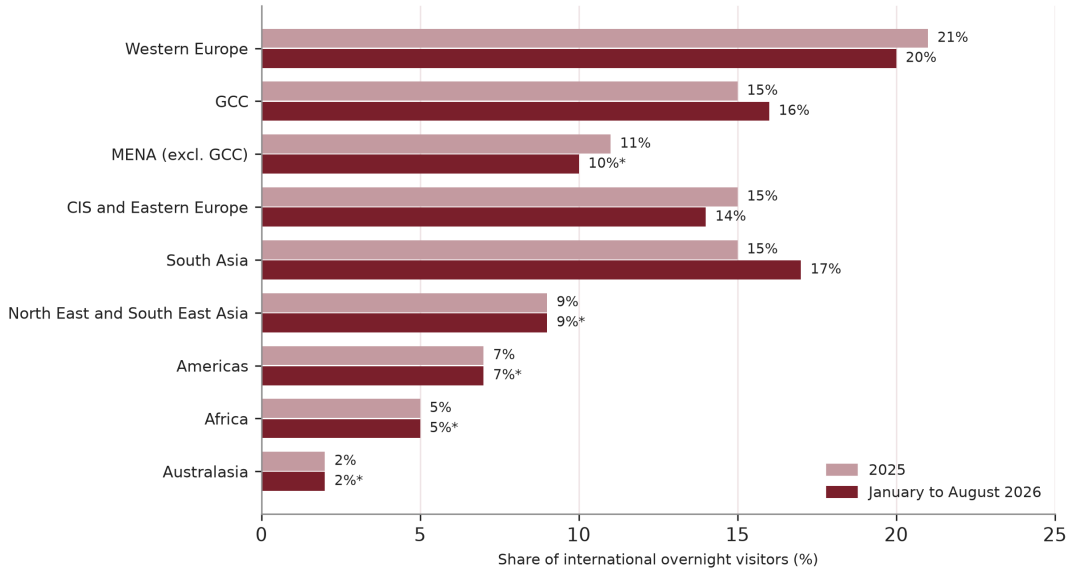
Each panel has its own scale. Length of stay (3.7 nights), rooms (154,264) and establishments (827) are given for 2025 only and are not charted.
Calendar years; data published 9 Feb 2026.
Source: GDMO 2026a.

Figure 1. Dubai visitor and hotel indicators, 2024 and 2025

Source: GDMO 2026a.

Western Europe was the largest source region with 4.1 million visitors (21%). The GCC supplied 2.99 million (15%) and the wider MENA region 2.17 million (11%), a combined 26% (GDMO 2026a). The full regional breakdown is in Figure 2.

Figure 2. Dubai international overnight visitors by source region, 2025 and January to August 2026 (per cent)



* 2026 share from WAM 2026d (14 Sep 2026), reporting the same DET briefing. Shares are rounded by the publisher and may not sum to 100.
MENA (excl. GCC) is the release's MENA proximity market. Data published 9 Feb 2026 (2025) and 13 Sep 2026 (2026).
Sources: GDMO 2026a, 2026b; WAM 2026d (five 2026 shares not in GDMO 2026b).

Figure 2. Dubai international overnight visitors by source region, 2025 and January to August 2026 (per cent)

Sources: GDMO 2026a, 2026b; WAM 2026d.

3.2 January to August 2026

DET's latest release, published by the GDMO on 13 September 2026, covers January to August 2026. Dubai received 6.97 million international overnight visitors in those eight months, with about 869,000 in August, the highest monthly figure since February 2026 (GDMO 2026b). Hotel occupancy was 66% in August, which the release describes as 89% of the August 2025 level, after 36% in March 2026. Hotels recorded 21.61 million occupied room nights over the eight months, and room inventory "approached 149,000 rooms" at the end of August, as some properties began renovation projects (GDMO 2026b). A WAM report of 14 September 2026 gives the end-August inventory as 148,796 rooms in 947 establishments, with shares for the remaining source regions (WAM 2026d). Table 1 sets out the figures.

Table 1. Dubai, January to August 2026

Indicator	Period	Value
International overnight visitors	Jan–Aug 2026	6.97 million
International overnight visitors	Aug 2026	about 869,000
Hotel occupancy	Mar 2026	36%
Hotel occupancy	Aug 2026	66%
Hotel occupancy as share of August 2025 level	Aug 2026	89%
Occupied room nights	Jan–Aug 2026	21.61 million
Hotel rooms	End-August 2026	about 149,000
Average daily rate (AED)	Jan–Aug 2026	not stated
RevPAR (AED)	Jan–Aug 2026	not stated
Hotel rooms (exact)	End-August 2026	148,796
Hotel establishments	End-August 2026	947

Sources: GDMO 2026b; WAM 2026d.

Note: "not stated" means GDMO 2026b gives no value for that period.

The release gives no ADR or RevPAR for 2026 and no year-on-year change for the eight-month visitor total. A like-for-like January to August 2025 figure was not found in the sources opened, so this paper does not calculate a percentage decline. DET's own Tourism Performance Report page for January to August 2026 returned "Access Denied" to both routes tried on 30 October 2026 (see Sources).

4. Abu Dhabi

DCT Abu Dhabi's 2025 results, carried by WAM on 6 April 2026, report a record 26.6 million visitors in 2025 (WAM 2026a). The release does not define this total, which dwarfs the hotel figures. Abu Dhabi recorded 5.9 million hotel guests, 2.2% more than in 2024, plus 338,000 guests in holiday homes and glamping sites. International guests grew 10% and occupancy rose three percentage points to 81% (WAM 2026a).

Hotel revenues rose 19.5% to AED 9.1 billion. ADR rose 19% and RevPAR 23% (WAM 2026a). DCT Abu Dhabi's annual report page gives the 2025 ADR as AED 591 (DCT Abu Dhabi 2026). Average length of stay across all accommodation types was 2.9 nights. India was the largest source market with 436,124 hotel guests, followed by Russia (257,200), the United Kingdom (250,906), China (248,494) and Saudi Arabia (200,652) (WAM 2026a). The release describes India's figure as "13% of the total", although 436,124 is about 7% of the 5.9 million hotel guests; the base of the 13% is not stated. MICE delegates rose 40% to 2.2 million (WAM 2026a).

No official DCT Abu Dhabi release covering 2026 to date was found. The Statistics Centre – Abu Dhabi publishes monthly hotel statistics sourced from DCT Abu Dhabi, listed up to June 2026 on 30 October 2026 (SCAD 2026); these were not used in this paper. A trade publication, Skift, reported on 16 September 2026 that hotel guests were down 14.2% year to date, at 3.2 million, and that August guests fell 5.2% to 512,000, citing DCT data shared with it (Skift 2026). Because they are a press report of unpublished official data, they appear here for context only and are not charted.

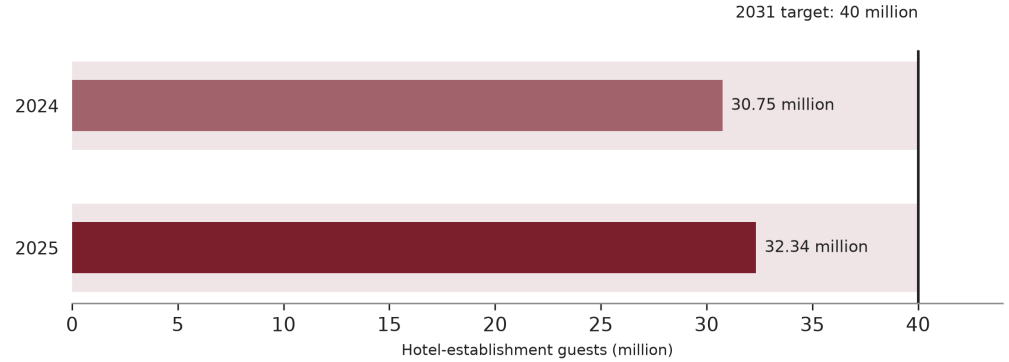
5. The UAE as a whole

The Ministry of Economy and Tourism reported on 15 April 2026 that UAE hotel establishments recorded about 32.34 million guests in 2025, up 5.2% from 30.75 million in 2024 (WAM 2026b). Hotel nights exceeded 110.62 million, against 104.45 million. Hotel revenues rose 9.7% to about AED 49.21 billion, occupancy was 79.3%, and the UAE had 217,000 hotel rooms at the end of 2025 (WAM 2026b).

A GDMO release of 26 May 2026 on the Emirates Tourism Council's report gives slightly different figures for the same year: more than 32 million guests, up 5.1%; the same AED 49.21 billion in revenue; 217,000 rooms in more than 1,240 establishments; occupancy of 79.5%; and hotel nights "reaching 100 million" (GDMO 2026c). This paper uses the Ministry's figures from WAM 2026b in Figure 3 and notes the difference.

Against the strategy's hotel-guest goal, the 2025 count of 32.34 million is 80.9% of 40 million (EPIC calculation from WAM 2026b and UAE Government 2026). The remaining gap is 7.66 million guests a year. The federal series counts hotel-establishment guests, which is exactly what the target names. Figure 3 sets the 2024 and 2025 counts against the target.

Figure 3. UAE hotel-establishment guests, 2024 and 2025, against the 2031 target (million)



Ministry figures (WAM 2026b, 15 Apr 2026). GDMO 2026c (26 May 2026) gives more than 32 million guests for 2025.
One traveller staying in more than one emirate may be counted more than once. Target per UAE Government 2026 (updated 21 Oct 2026) and WAM 2022 (11 Nov 2022).
Sources: WAM 2026b; UAE Government 2026; WAM 2022.

Figure 3. UAE hotel-establishment guests, 2024 and 2025, against the 2031 target (million)

Sources: WAM 2026b; UAE Government 2026; WAM 2022.

6. The GCC unified tourist visa

GCC interior ministers took up the unified tourist visa at their 40th meeting, held in Muscat on 8 November 2023. The GCC Secretariat General's release lists among the main items "تنفيذ مشروع التأشيرة السياحية الخليجية الموحدة وفق برنامج زمني محدد" (implementing the unified Gulf tourist visa project according to a set timetable) (GCC-SG 2023a). A press report states that GCC tourism ministers had approved the proposal unanimously in October 2023 (Khaleej Times 2026). No official text opened for this paper confirms that October approval. The first official approval found is the GCC Supreme Council's of 5 December 2023 (GCC-SG 2023b).

On 2 July 2025 the GCC Secretariat General reported that the passport departments of GCC interior ministries were holding joint technical meetings "to launch the unified tourist visa project in the near future" (GCC-SG 2025a). The release, in both its English and Arabic versions, describes the meeting as held "today, Wednesday" and dates it 2 June 2025; 2 June 2025 was a Monday and the release is dated Wednesday 2 July 2025, so the date in the text looks like a slip for 2 July 2025. The final statement of the 46th session of the GCC Supreme Council, issued on 3 December 2025, does not mention the visa in the text opened (GCC-SG 2025b).

On 6 September 2026 the GCC Secretary-General said at a conference in Riyadh that the visa would launch "soon", without giving a date, fee, validity or application process (Khaleej Times 2026). No official launch announcement, fee or application portal was found in searches run on 30 October 2026. On that date the visa was approved and still not in operation. The GCC Supreme Council, at its 44th session in Doha on 5 December 2023, welcomed the interior ministers' work on the unified tourist visa, adopted what had been reached and delegated the interior ministers to take the steps needed to implement it (GCC-SG 2023b, para. 32); its 45th session statement of 1 December 2024 repeated this (GCC-SG 2024, para. 40). Press reporting

uses the names "GCC Grand Tours" and "GCC Grand Tourist Visa" (Khaleej Times 2026 uses the latter); neither name was found in an official GCC text opened for this paper.

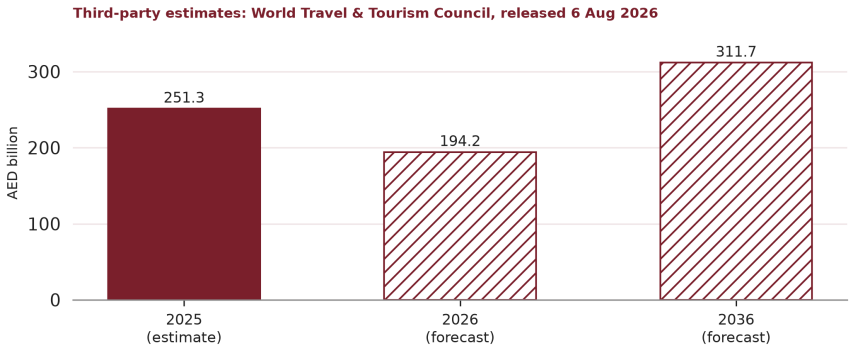
7. Economic contribution

In the sources opened, the Ministry's hotel revenue figure (Section 5) is the only official measure of the sector's economic weight. The tourism-sector GDP measure used for the AED 450 billion target is not published in the sources opened.

WTTC publishes annual Economic Impact Research. These are modelled third-party estimates, revised each year, and carry no official status. In its Middle East release of 27 April 2026 WTTC estimated that UAE travel and tourism contributed US$68.5 billion to GDP in 2025, with international visitor spending of US$56.9 billion (WTTC 2026a). WTTC notes that the 2026 edition uses 2025 real prices and exchange rates, so its headline figures are not directly comparable with the 2025 edition (WTTC 2026a). In its Global Trends release of 6 August 2026 WTTC put the sector at 11.9% of UAE GDP and 13.6% of total employment (WTTC 2026b).

WTTC's UAE factsheet for its 2026 Economic Impact Research, released on 6 August 2026, estimates the total contribution of travel and tourism to UAE GDP at AED 251.3 billion (US$68.5 billion, 11.9% of the economy) in 2025. It forecasts a fall of 22.7% to AED 194.2 billion (9.1%) in 2026 and AED 311.7 billion (10.6%) by 2036, in constant 2025 prices and exchange rates (WTTC 2026c). Figure 4 charts the three totals. The newspaper Al Bayan reported these figures on 9 August 2026, together with a direct contribution of AED 122.9 billion (5.8% of GDP) in 2025 (Al Bayan 2026). These are third-party modelled estimates and forecasts and should be read as such.

Figure 4. WTTC estimates of the total travel and tourism contribution to UAE GDP, 2025, 2026 and 2036 (AED billion)



Modelled estimates by a private industry body, revised every year; not official statistics. Hatched bars are forecasts.
Constant 2025 prices and exchange rates. Not comparable with the AED 450 billion strategy target.
Source: WTTC 2026c (United Arab Emirates 2026 Economic Impact Research: Key Highlights).

Figure 4. WTTC estimates of the total travel and tourism contribution to UAE GDP, 2025, 2026 and 2036 (AED billion)

Source: WTTC 2026c (United Arab Emirates 2026 Economic Impact Research: Key Highlights).

WTTC also forecast that Middle East travel and tourism GDP would fall 14.5% in 2026, from US$386 billion to US$330 billion, the only regional decline worldwide, because of "the impact of conflict on airspace and travel flows" (WTTC 2026b).

UN Tourism supplies the regional backdrop. Its January 2026 World Tourism Barometer reports that Middle East international arrivals grew 3% in 2025 to 99.8 million (provisional), 39% above 2019 (UN Tourism 2026a, regional table and text); its later release of 2 June 2026 puts 2025 Middle East arrivals 40% above 2019 (UN Tourism 2026c). Its September 2026 Barometer reports global arrivals of about 690 million in January to June 2026, up 0.4%, with the Middle East conflict cited as one cause of a weaker second quarter (UN Tourism 2026b, abstract). UN Tourism's Barometer data page reports that Middle East arrivals "declined by 22% in this first half of the year" (UN Tourism 2026d).

8. Risks

Air access. The UAE's visitor economy depends on air connectivity. On 28 February 2026 the General Civil Aviation Authority announced the temporary and partial closure of UAE airspace "amid rapidly escalating security developments in the region" (WAM 2026c). Dubai's hotel occupancy was 36% in March 2026 (GDMO 2026b). The Ministry's Emirates Tourism Council met in April 2026 to discuss "accelerating the recovery of the tourism sector" in light of "current regional conditions" (WAM 2026b).

Concentration of source markets. Western Europe supplied 21% of Dubai's visitors in 2025 and 20% from January to August 2026 (GDMO 2026a, 2026b). The GCC share was 15% in 2025 and 16% in the 2026 period. In Abu Dhabi, India was the largest source market for hotel guests in 2025, with 436,124 (WAM 2026a).

Supply and price. Dubai's room inventory was 154,264 at the end of 2025 and approached 149,000 at the end of August 2026, a fall the release attributes partly to renovations (GDMO 2026a, 2026b). Room rates rose faster than occupancy in 2025 in both emirates. ADR grew 8% in Dubai and 19% in Abu Dhabi (GDMO 2026a; WAM 2026a). Growth built on rates is harder to hold once demand weakens.

Measurement. The authorities use different units: international overnight visitors, hotel guests, all visitors and hotel-establishment guests. The two federal releases on 2025 differ on growth, occupancy and hotel nights. Until a single published series links the emirate and federal counts, progress towards 40 million hotel guests and AED 450 billion cannot be tracked from public data alone.

9. Assessment

The UAE ended 2025 with record hotel figures at the national level and in both large emirates. On the Ministry's count it stood at about four-fifths of the 2031 hotel-guest target. The 2026 disruption knocked that back. Dubai's eight-month total of 6.97 million is about 36% of its 2025 full-year total, although the remaining four months include the peak season. The unified GCC visa, which could make multi-country trips simpler, remained unlaunched nearly three

years after the GCC Supreme Council adopted it in December 2023. Judging the 2031 GDP target would need a published tourism satellite account or an equivalent official series, and none was found.

Full references are listed under Sources.

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