GCC MARKETS OUTBOUND TRENDS TO EUROPE IN 2023

FITUR 2024
GCC’s Outbound Air capacity to Europe 2023

In million direct flight seats, 2023

- UAE: 14.74
- Qatar: 6.16
- KSA: 2.17
- Kuwait: 0.86
- Bahrain: 0.59
- Oman: 0.57

- United Kingdom: 29%
- Germany: 13%
- Italy: 10%
- France: 9%
- Spain: 5%

Top EU Arrival Cities from the GCCs

- London
- Paris
- Frankfurt
- Manchester
- Milan

Source: Mabrian, Cirium
GCC’s Trip Seasonality to Europe: flight searches

Source: Mabrian, Travelport. Searches from Qatar, Oman and Bahrein were multiplied by three for visual reasons.

Search date: July 2022 - December 2023
GCC’s Outbound search & stay for Europe in 2023

Flight search anticipation in days

- KSA: 75 days
- Oman: 75 days
- Qatar: 67 days
- Bahrain: 67 days
- UAE: 66 days
- Kuwait: 60 days

Search for flights 2 to 2.5 months in advance

+9 days of stay

Length of Stay in days

- Oman: 12.4 days
- Qatar: 11.2 days
- Bahrain: 9.3 days
- UAE: 8.7 days
- KSA: 8.5 days
- Kuwait: 8.0 days

Source: Mabrian, Cirium
GCC’s drivers to visit Europe, 2023

- Arts & Culture: 28%
- Food & Cuisine: 17%
- Wellness: 11%
- Nature: 11%
- Active Lifestyle: 9%
- Family Activities: 7%
- Shopping: 6%
- Sunbathing: 6%
- Nightlife: 4%
- Sunbathing: 6%

Source: Mabrian, Instagram, Twitter
**Recommendations for the market**

**¿Where is the demand?**
92% of air connectivity seats are from 3 countries: UEA, Qatar and KSA

**¿When they travel?**
Demand peaks in Eid al-Fitr, the Eid al-Aidha and the Islamic New Year

**¿How I attract them?**
- Campaigns 3 months ago
- 9 days or more packages
- Culture, Gastronomy, Nature and Wellness
REAL USE CASE FOR AIR CONNECTIVITY

Sustainable Air Capacity Growth

- **Objective:** empower the destination to understand the context and negotiate with airlines to avoid inefficiencies: saturation, high dependence of seasons and specific markets.
  Destination: Georgia.

- **Approach:** analyse airlines’ flight schedules and geographic distribution, flight searches and flight prices to identify opportunities. Use transactional data to measure the results.

**Results:**

New route established from Abu Dhabi with Flydubai

- **Seats in Abu Dhabi–Georgia route:**
  - High season: 36%
  - Low season: 64%

- **62K new visitors** in low season
- **40 Million euros** impact in low season

![Flight Searches Share by City of Origin](image_url1)

Travel period July-August 2021, Searches completed in 1st March-29th June 2021

- **Dubai:**
  - 2019: 86%
  - 2021: 79%
  - Opportunity for direct route – high demand

- **Sharjah:**
  - 2019: 9%
  - 2021: 12%
  - Opportunity for direct route – low capacity

- **Abu Dhabi:**
  - 2019: 6%
  - 2021: 9%

*Direct Flight Capacity Jul–Aug 2019–21: UAE*

- **By Airline**
  - *Flydubai:* 2019: 37,680, 2021: 37,680
  - *Air Arabia:* 2019: 17,224, 2021: 17,224
  - *Air Arabia:* 2019: 2,016, 2021: 2,016

- **By Route**
  - Dubai: 2019: 37,680, 2021: 37,680
  - Sharjah: 2019: 17,224, 2021: 17,224
Most comprehensive data intelligence solution for Travel & Tourism

INFO@MABRIAN.COM
MABRIAN.COM

Carlos Cendra
CHIEF MARKETING & COMMUNICATIONS OFFICER
CARLOS@MABRIAN.COM