



Travel in Middle East and Africa

January 2025

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Key findings

REGIONAL OVERVIEW

Middle East and Africa has the lowest per capita spend

Return to pre-pandemic sales level expected in 2025 in real value terms

Booking and lodging yet to return to their pre-pandemic sales levels in 2024

In-destination spending dynamic post-pandemic in the United Arab Emirates

Israel-Hamas war affects visitor numbers to Israel in 2024

In-destination a major winner over 2019-2024

Vision 2030 helping drive growth in Saudi Arabian travel

War impacting the travel industry in Israel

LEADING COMPANIES AND BRANDS

Saudi Arabia has more than 40,000 hotel rooms under construction

Airbnb continues to lead lodging at a regional level

Saudi Arabian Airlines adding routes and aircraft in the face of competition from LCCs

NEOM Airlines is slated to serve visitors to Saudi Arabia's new mega-city

Booking Holdings consolidates its leadership among travel intermediaries in 2024

Just outside the top 10, Almosafer launches Concierge service for HNWIs

FORECAST PROJECTIONS

Positive growth expected throughout the 2024-2029 period

Continued development of the travel industry a key pillar of Saudi Arabia's Vision 2030

Israel adding 12,000 new hotel rooms

COUNTRY SNAPSHOTS

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Egypt: Competitive Landscape

Israel: Market Context

Israel: Competitive Landscape

Morocco: Market Context

Morocco: Competitive Landscape

Saudi Arabia: Market Context

Saudi Arabia: Competitive Landscape

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United Arab Emirates: Market Context

United Arab Emirates: Competitive Landscape

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