SEGMENT AND ORIGIN-DESTINATION DEMAND FROM EUROPE TO THE UAE AND QATAR: TRENDS AND POTENTIALLY UNDERSERVED MARKETS

INAIR "FLY HIGH, LEARN FAR"
Paola, Malta, 28 Oct, 2025

Sven Maertens & Wolfgang Grimme, German Aerospace Center (DLR)

Introduction & Research Question

Growing traffic via the Gulf region, but what about the Gulf as a destination?

Emirates A380 Routes, 2023

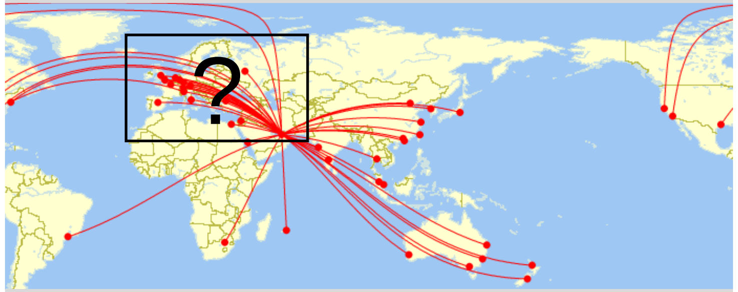


Figure source: https://knaviation.net/emirates-a380/; own additions.

- Strong air transport development to and from the UAE and Qatar
- From a European perspective, DXB, AUH and DOH are still mainly regarded as transfer points – despite becoming increasingly important destinations / points of origin
- Little research on the evolution of origin-destination (OD) flows to and from the UAE and Qatar ("UAE as origin or destination")
- Research questions:
  - How have OD and segment passenger numbers from Europe to the UAE and Qatar evolved over time, both in aggregate and at country-pair levels?
  - Which European countries had no direct flights to the UAE or Qatar in 2024?
  - Which are the largest airport pairs between Europe and the UAE and Qatar, respectively, in terms of OD flows that are un(der)served by direct flights?

Outline

- Introduction & Research Question
- Literature
- Methodology & Data
- Results
  - Development of OD and segment traffic between Europe and UAE/Qatar
  - Development of UAE/Qatar-bound traffic at the European country level
  - European countries with and without UAE/Qatar connections
  - Key OD flows with only limited nonstop or direct UAE/Qatar connection
- Conclusion & Outlook

Literature

Scarce (recent) research on traffic flows to and from the Gulf, leaving room for our work.

- Business model and success factors of Gulf carriers (e.g., Vespermann, 2008; O'Connell, 2011; Hooper, 2011; Alkaabi, 2014; Logothetis and Miyoshi, 2018)
- Competitive and traffic impacts on EU/US hubs and airlines (e.g., Vespermann, 2008; Grimme, 2011; Dresner et al., 2015)
- System efficiency of the Gulf carriers' hub-and-spoke networks compared to European hub carriers (O'Connell et al., 2018)
- Impact of (additional) traffic rights (e.g., Forsyth, 2014; Squalli, 2014) and analysis of protectionist behavior (De Wit, 2014)

Methodology & Data

Descriptive approach: Comparison of OD and segment passenger numbers between Europe and the UAE / Qatar

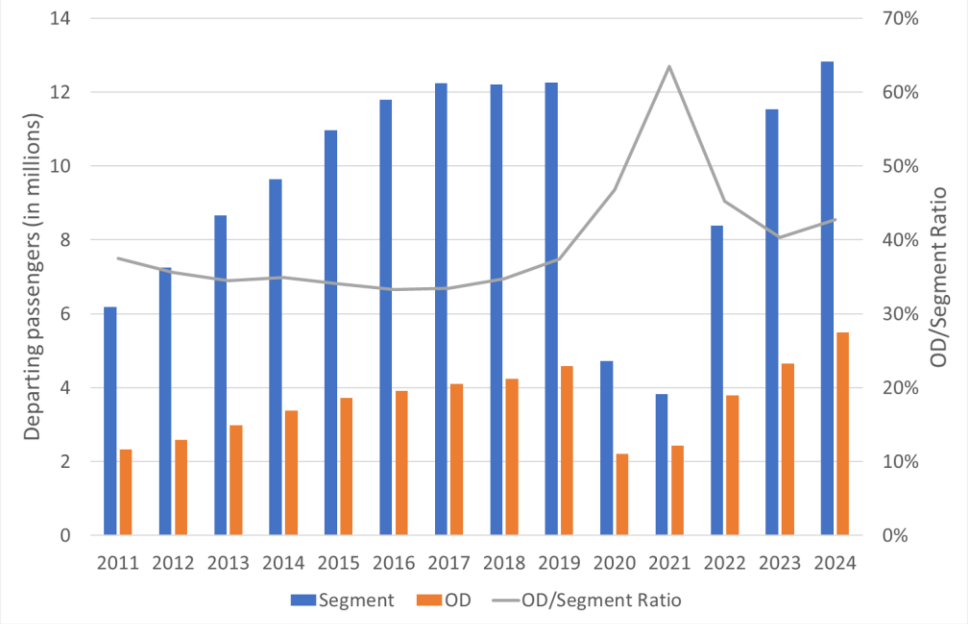
- Data source: Sabre Market Intelligence (MI)
  - Monthly passenger numbers from reservation systems (MIDT – Marketing Information Data Tapes) and other sources
  - Reliable at least for markets not dominated by LCCs with high direct sales, and at aggregated levels
  - Segment (leg) statistics = direct route / flight level
  - OD statistics = traffic between origins and destinations as ticketed, including indirect connections (if any)
- Simple indicator (OD/segment passenger ratio), relating the number of OD passengers to the number of segment passengers
  - <1: Less OD than segment passengers: total demand exceeding local demand ⇨ route offered partly or even predominantly for transfer traffic
  - >1: OD demand higher than segment demand ⇨ route potentially underserved
- Europe = EU, Switzerland, United Kingdom, Iceland and Norway

Results

Development of OD and segment traffic from Europe to the UAE, 2011-2024

- Segment passengers up 98%,
  OD up 136% since 2011
- Pre-Covid-19 levels exceeded
- OD/segment ratio up from 38% in 2011 to 43% in 2024
- UAE has gained in relative importance as a destination or stopover point
- Overall, UAE still more important as a transfer point than as a destination for traffic from Europe

Evolution of departing segment and OD passengers, Europe-UAE, 2011-2024.



Sven Maertens & Wolfgang Grimme, German Aerospace Center

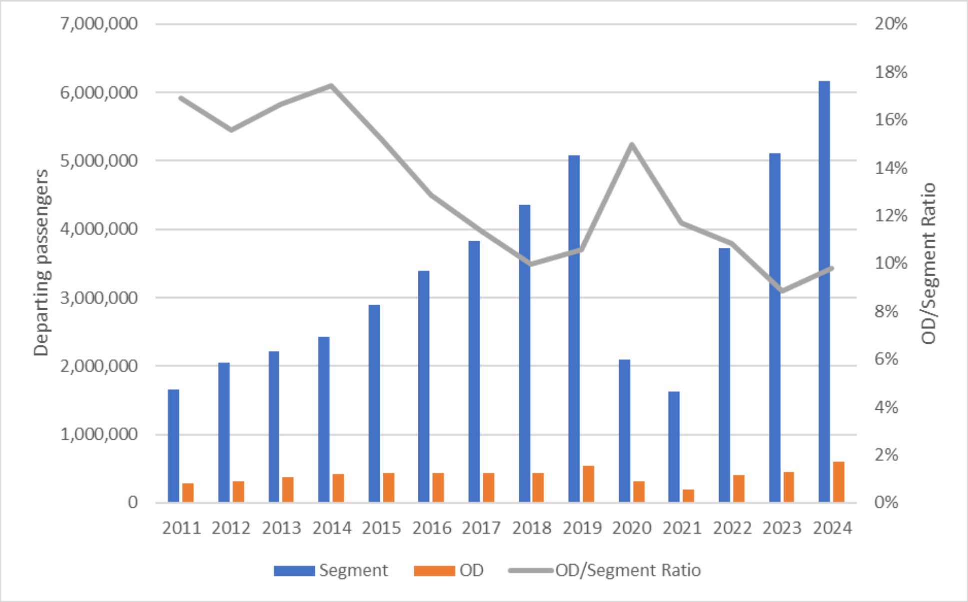
Data source: Sabre MI

Results

Development of OD and segment traffic from Europe to Qatar, 2011-2024

- Segment passengers up 273%, OD up 116% since 2011
- OD/segment ratio down from 17% in 2011 to 10% in 2024
- Qatar much (and increasingly) more important as a transfer point than as a destination for traffic from Europe
- Massive hub-and-spoke strategy of Qatar Airways

Evolution of departing segment and OD passengers, Europe-Qatar, 2011-2024.



Sven Maertens & Wolfgang Grimme, German Aerospace Center

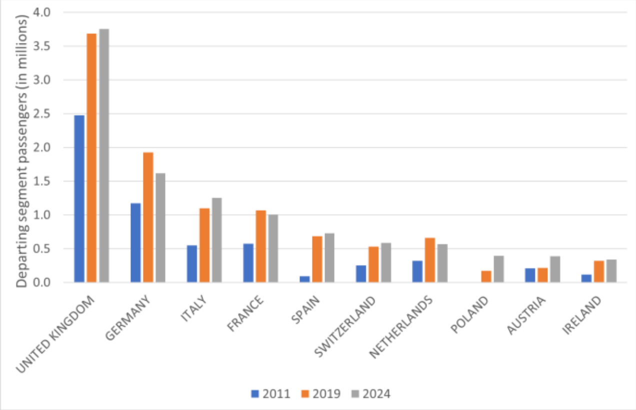
Data source: Sabre MI

Results

Development of UAE-bound traffic at the European country level, 2011-2024

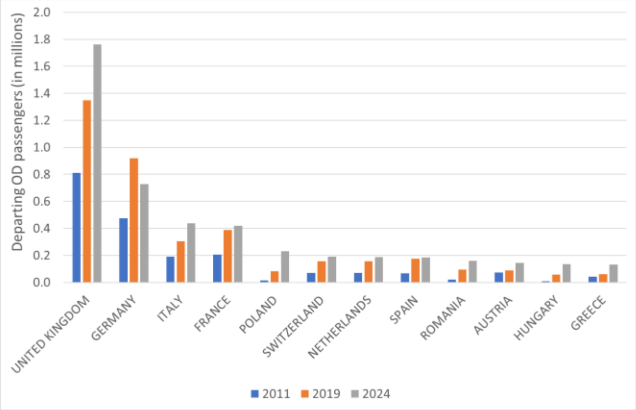
Segment level

- Comparably moderate growth in larger markets like UK (+52%), Germany (+38%) and France (+76 %), or Austria (+87%) and the Netherlands (+78%)
- Stronger growth above 100% in Italy (+128%), Spain (+732%) and many smaller markets
- Full Covid-19 recovery in most markets, except Germany (84%), France (94%), the Netherlands (86%) and some smaller markets, including Sweden (60%) and Finland (32%).



OD level

- Among the four largest markets in 2024, only Germany (+53%) shows growth well below 100%.
- Bookings from the UK, France, Italy, Spain, the Netherlands, Austria and Switzerland increased by ~100% - 200%.
- Demand from smaller European countries (with the exception of the Nordics) grew even more strongly.
- Covid-19 recovery still <100% in Germany and some smaller markets



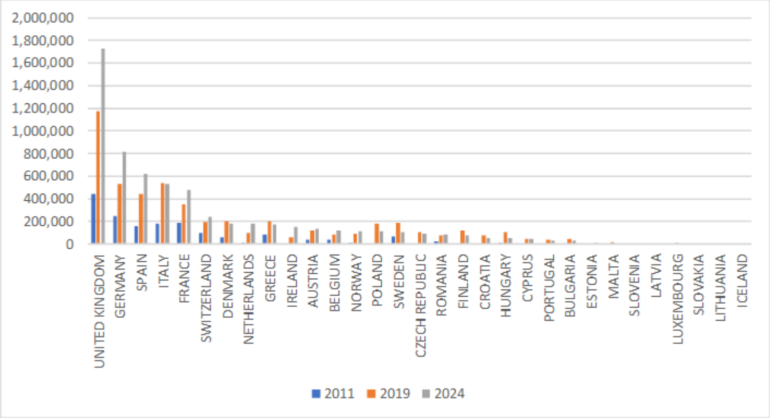
Data source: Sabre MI

Results

Development of Qatar-bound traffic at the European country level, 2011-2024

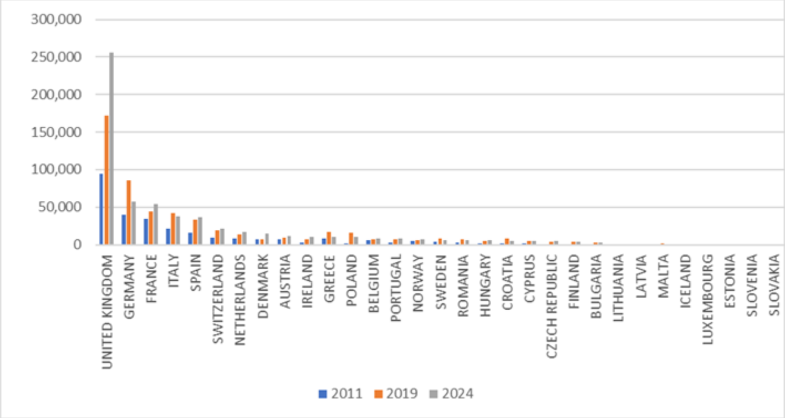
Segment level

- UK as largest market for direct flights to Qatar, strongly growing by 293% since 2011, followed by Germany (+226%), Spain (+296%), Italy (+189%) and France (+159%)
- Strong growth from Spain and the UK likely driven by Qatar Airways' oneworld alliance membership
- With the exception of Sweden (0.1 million passengers in 2024; +53%), triple-digit growth for most countries with more than 100,000 segment passengers to Doha in 2024



OD level

- Countries with particularly strong OD growth above 100% include the UK, Spain, Switzerland, the Netherlands, Ireland, Poland and Portugal, as well as most smaller markets.
- By contrast, OD growth from Germany, France, Italy, Denmark, Austria, Greece and Belgium has been less dynamic.
- Germany and Sweden, along with Italy, Greece and Poland, have so far remained below pre-pandemic volumes.



Data source: Sabre MI

Results

European countries with and without UAE/Qatar connections, 2024

- Only Estonia and Iceland without any direct flights
- Latvia, Lithuania, Luxembourg Malta, Slovakia and Slovenia not directly connected with Qatar
- Abu Dhabi connected with 18 European countries, all of which also reporting segment passenger volumes to Qatar
- Five further countries (Croatia, Czech Republic, Finland, Norway and Sweden) connected to Doha but not to Abu Dhabi
- Dubai International remaining by far the dominant Gulf gateway, with Sharjah (Air Arabia) and Dubai World Central (European LCC / charter operators) serving more niche roles

Segment passenger numbers between European countries and key airports in UAE and Qatar, 2024

Origin	DXB	AUH	DWC	SHJ	DOH	Origin	DXB	AUH	DWC	SHJ	DOH
AUSTRIA	239,549	144,162	0	1,358	136,687	LATVIA	26,037	0	0	0	0
BELGIUM	175,936	89,738	0	0	121,652	LITHUANIA	5,394	0	0	0	0
BULGARIA	37,678	20,508	0	0	32,420	LUXEMBOURG	0	0	9,104	0	0
CROATIA	36,520	0	0	0	55,684	MALTA	30,087	0	0	0	0
CYPRUS	115,821	43,458	0	0	44,621	NETHERLANDS	453,832	108,997	1,956	0	179,222
CZECH R.	180,636	0	10,228	0	93,731	NORWAY	90,384	0	760	0	116,119
DENMARK	130,203	52,857	1,599	0	182,580	POLAND	286,440	71,907	0	32426	113,302
ESTONIA	0	0	0	0	0	PORTUGAL	206,810	55,610	0	0	34,516
FINLAND	19,937	0	0	0	76,217	ROMANIA	145,518	59,891	580	0	80,581
FRANCE	791,798	202,058	8,554	0	480,126	SLOVAKIA	6,567	0	1,782	0	0
GERMANY	1,287,220	313,511	16,787	0	813,562	SLOVENIA	28,805	0	0	0	0
GREECE	180,719	106,779	0	18,021	176,122	SPAIN	443,499	282,683	0	0	619,480
HUNGARY	187,601	47,517	0	0	51,119	SWEDEN	95,000	0	754	0	105,769
ICELAND	0	0	0	0	0	SWITZERLAND	427,355	151,179	8,017	0	240,590
IRELAND	217,024	118,985	0	0	149,869	UNITED KINGDOM	3,059,297	693,037	0	5	1,730,562
ITALY	823,812	360,665	11,193	54,589	530,095						

Data source: Sabre MI

Results

DLR

Key OD flows with only limited nonstop or direct UAE/Qatar connections, 2024

- Existing demand well accommodated by segment supply
- Only 12 / 0 European airports with OD demand to a UAE airport / Doha > 100 pax/week, but lower segment passengers
- Marseille shows notably higher OD demand than segment passengers, though winter flights by Transavia France help partially close the gap.
- Stuttgart, where Emirates and Etihad Airways are not permitted to operate, is served by Eurowings
- Significant OD demand but no direct flights to DXB from Malaga, Tallinn, Porto, Gothenburg, Thessaloniki, Toulouse, and Hanover, and to Abu Dhabi from Berlin
- Luxembourg however connected DWC

Airport pairs Europe-UAE/Qatar with OD demand exceeding 5,200 passengers and segment traffic below 5,200 passengers.

Origin City	Origin Country	Destination City	Passengers OD	Passengers Segment	OD/Segment Ratio
Marseille	France	Dubai	11,765	3,878	303%
Malaga	Spain	Dubai	10,846	0	
Stuttgart	Germany	Dubai	9,368	3,283	285%
Tallinn	Estonia	Dubai	9,190	0	
Porto	Portugal	Dubai	8,991	0	
Gothenburg	Sweden	Dubai	8,618	0	
Thessaloniki	Greece	Dubai	7,135	0	
Luxembourg	Luxembourg	Dubai	6,237	0	
Toulouse	France	Dubai	6,113	0	
Berlin	Germany	Abu Dhabi	5,804	0	
Hanover	Germany	Dubai	5,558	0	
Nuremberg	*Germany*	*Abu Dhabi*	*5,330*	*4,629*	*115%*

Data source: Sabre MI

Conclusion

Only limited underserved markets between Europe and the UAE / Qatar

- Between 2011 and 2024, OD traffic between Europe and the UAE grew faster than segment traffic, raising the OD/segment ratio from 38% to 43%.
- In contrast, Qatar's segment traffic outpaced OD traffic, lowering its ratio from 17% to 10%.
- The UAE's main European markets are the UK, Germany, and Italy, while Spain plays a larger role for Qatar.
- Recovery from Covid-19 has been uneven, with Finland, Sweden, and Germany still lagging.
- Existing demand well accommodated by segment supply:
  - Underserved OD flows exceeding 100 weekly passengers without direct service include routes such as Malaga, Porto, Gothenburg, and Tallinn to Dubai, and Berlin to Abu Dhabi.
  - Some markets, like Marseille and Stuttgart, show stronger OD than segment demand despite some seasonal services.
  - While most European countries now have links to the UAE, several still lack direct flights to Qatar.
- Limitations include the arbitrary threshold of 100 weekly passengers for "underserved" markets, and the fact that some passengers counted as OD are still likely to transfer via the Gulf (after a stopover exceeding the 24h IATA trip break rule)
- Future research could assess causal factors, low-cost carrier growth, OD/segment ratios as predictors of new routes, and less-studied regions such as the Balkans.

Imprint

Topic:	**Segment and OD demand from Europe to the UAE and Qatar: Trends and potentially underserved markets**
Date:	2025-10-28
Author:	Sven Maertens , Wolfgang Grimme
Institute:	Institute of Air Transport
Image sources:	All images “DLR (CC BY-NC-ND 3.0)” unless otherwise stated