



UAE SENTIMENT STUDY

Conflict Impact & Recovery Trends

A strategic assessment of reputation stability, audience sentiment profiles, and the operational engines driving confidence recovery

August 2026

Study Overview & Methodology Scope

Grounded in a comprehensive core dataset of 1,274 structured interviews

Methodological Rigor & Data Quality

Study Duration: Fieldwork completed between August 7th -15th, 2026, capturing immediate real-time sentiments during regional disruption

Balanced Segments: A high-fidelity cross-section of Leisure Travelers, Corporate Business Decision-Makers, Regular Flyers, and Residents & Nationals

Strategic Grounding: 100% of insights are strictly traceable to primary response patterns across aviation, commerce, and tourism sectors

Four audiences, fielded separately, sharing a common sentiment core

357	389	370	158
Flyers & Aviation	Leisure Travellers	Business Community	Residents & Nationals
Recent or booked UAE flyers	Recent, booked or considering visitors	Owners and senior decision-makers	Residents, expatriates and nationals

Modules 1–3 were fielded roughly half in India and half in the UAE. Module 4 is entirely UAE-resident

Executive Summary: The Six Core Pillars of Findings

Overall sentiments remain highly resilient, though immediate schedules have been revised

1. Cautious, Not Hostile

Perceptions of the UAE remain stable; audiences are adjusting schedules and logistics rather than altering their opinion of the nation

2. Experience-Led Concern

A massive 92% to 99% of travel and investment concern is grounded in active, personal operational experiences rather than media coverage

3. Active Substitution

Regional substitution is actively under way, particularly toward secure transit hubs to protect supply chains and business flow

4. One-Year+ Recovery

Recovery timelines are priced at over a year by 54% to 75% of respondents, but business interest remains deferred rather than destroyed

54–75%

expect recovery
to take over a year

5. Franchise holds Strong

The long-term UAE brand franchise is highly secure; business confidence is expected to rebound dramatically from 3.3 up to 7.9 in 12 months

82%

of businesses have
cut business travel

6. Residents are the Asset

Informed local residents and nationals represent the highest layer of optimism, proving that direct informational access fuels confidence

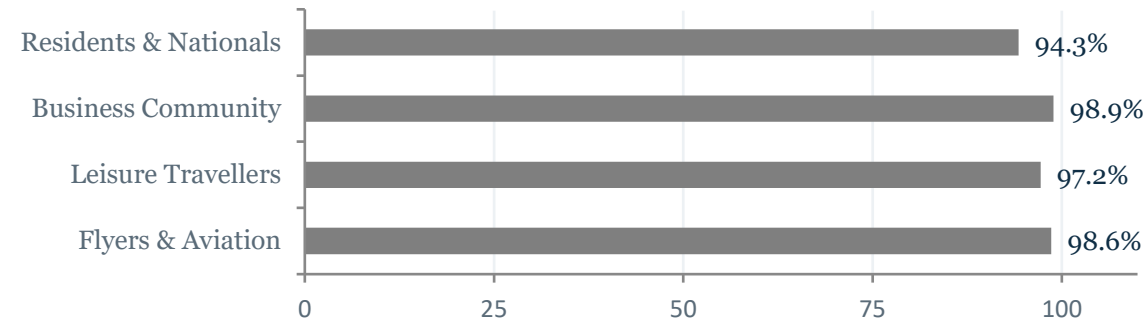
3.3 → 7.9

business confidence,
today vs 12 months

Opinion of the UAE has not changed

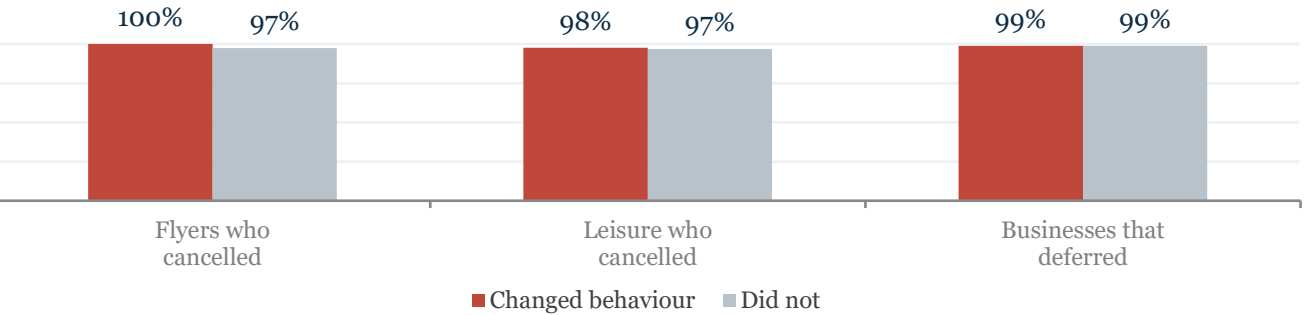
Impression versus six months ago — and the same question among those who changed their behaviour

% saying their impression of the UAE is unchanged versus six months ago



Fewer than 4% in any audience said their impression had become more negative

The same question, split by whether the respondent changed their behaviour



Key Takeaway

Opinion of the UAE and behaviour toward the UAE shows disparity

People have not revised their view of the country — they have revised their plans...

Current Sentiment Landscape: Caution Leads Everywhere

Local residents stand as the most resilient advocates while travelers remain highly sensitive

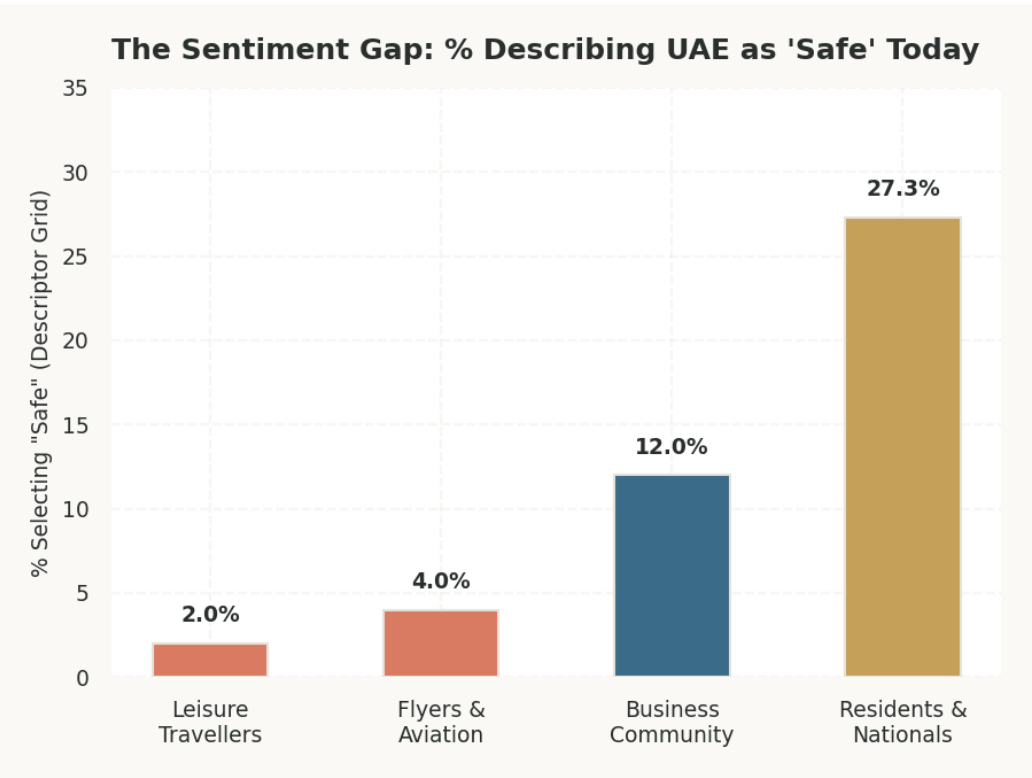
Segmented Safety Perceptions

Leisure Travelers (2.0%): Extremely sensitive to news and disruption. Safety/security descriptor sits at an absolute low of 2% in this segment

Flyers & Aviation (4.0%): Highly cautious and risk-averse. Demands robust operational fixes before recommitting to international flights

Business Leaders (12.0%): Pragmatically prudent. Commercial interests are on hold, but they express a baseline confidence in safety infrastructure

Residents & Nationals (27.3%): The core domestic asset. Strongest sense of local reality and safety, backed by high access to official information channels



Caution leads everywhere

Genuinely alarmed states stay lower — "Vulnerable" peaks at 31%

Residents feel safest

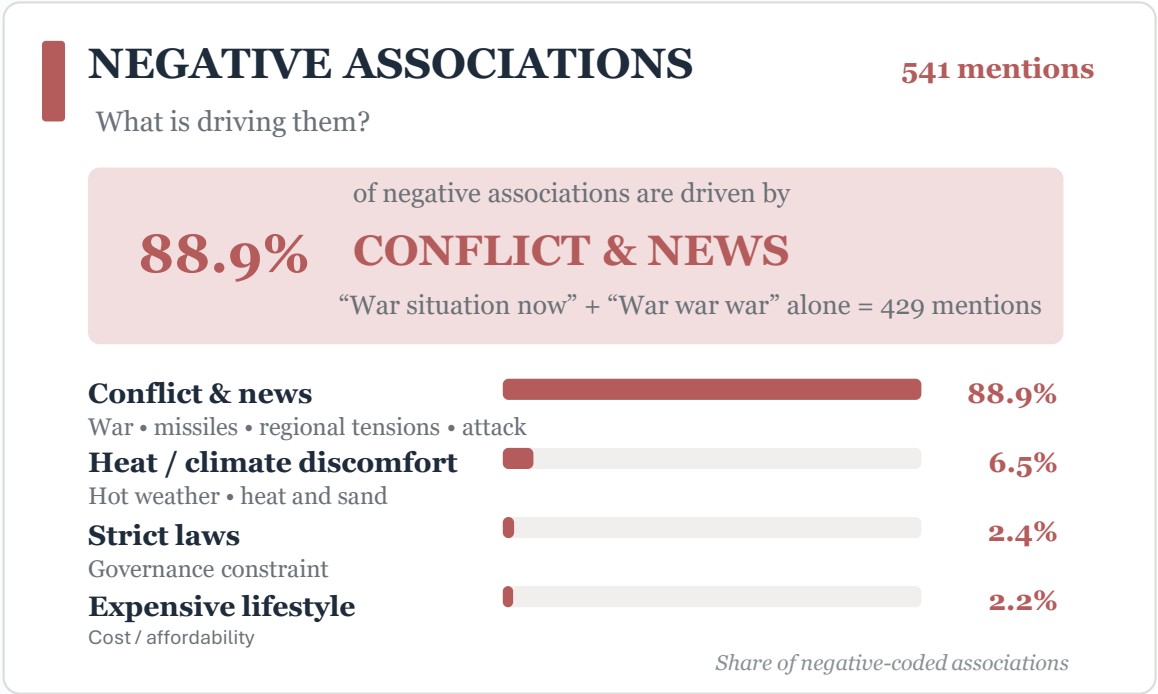
27% select "Safe" against 4% of flyers and 2% of leisure travelers

Leisure is most unsettled

Highest on Uncertain, Cautious and Concerned; least on Safe

What comes to mind about the UAE

The UAE retains strong associations with travel, luxury, modernity and opportunity; current negative salience is concentrated around regional conflict



Coding: conflict + heat + strict laws + expensive lifestyle = negative; “Middle East” and unclassifiable = neutral; remaining associations = positive.

UAE Brand Franchise: Bruised but Not Broken

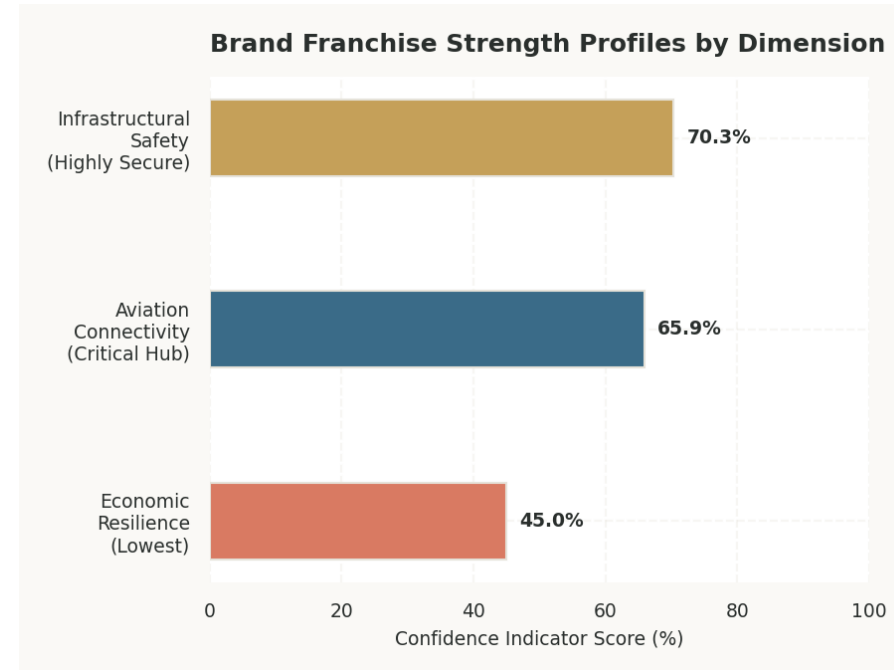
Safety remains the cornerstone of UAE's proposition while economic resilience needs support

Core Pillar Diagnostic

Infrastructural Safety (70.3%): Stands as the single most secure asset across all audience segments. Physical safety confidence remains robustly high

Aviation Connectivity (65.9%): Aviation is the vital lifeline. Reliable airspace connectivity holds a solid 65.9% confidence index, representing the core recovery engine

Economic Resilience (Lowest): Economic resilience scores are the most compressed across the board, signaling a need to reassure corporate investors of long-term stability



● Safety holds

The strongest proposition in three of four audiences

● Economic resilience is weakest

The lowest-scoring item in every single module

● Aviation is under-supported

Yet it is the mechanism every other proposition depends on

Flyers & Aviation

Base n = 357

47%

Comfort flying to the UAE

Below the scale midpoint

49%

Cancelled a trip

Only 1% travelled as usual

29.4%

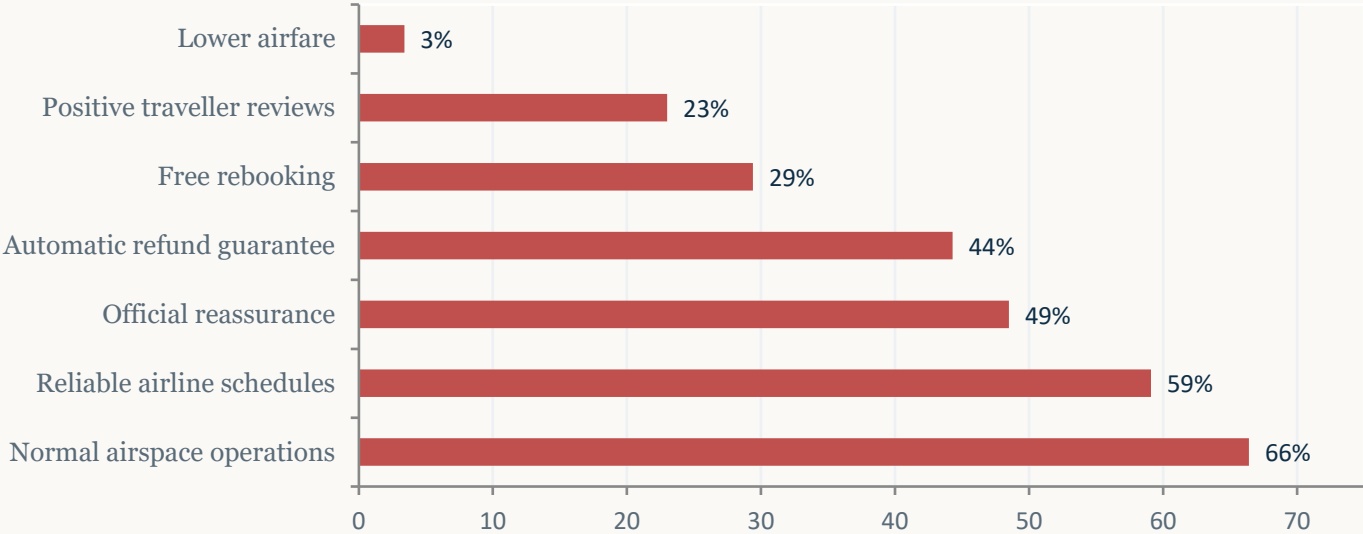
Switched regional hub

Riyadh 48%, Jeddah 47%

66.4%

Want normal airspace ops

The top requested fix



Price is not the lever

Lower airfare ranks last at 3.4%, below every operational and commercial ask. Refund guarantees and free rebooking both outrank it several times over

Operational reliability leads: sustained normal airspace operations (66%) and reliable schedules (59%)
Removing downside risk beats cutting price.

Two Populations: Inbound vs. Domestic Sentiments

Uncertainty creates risk of hub substitution, while local advocacy remains robust

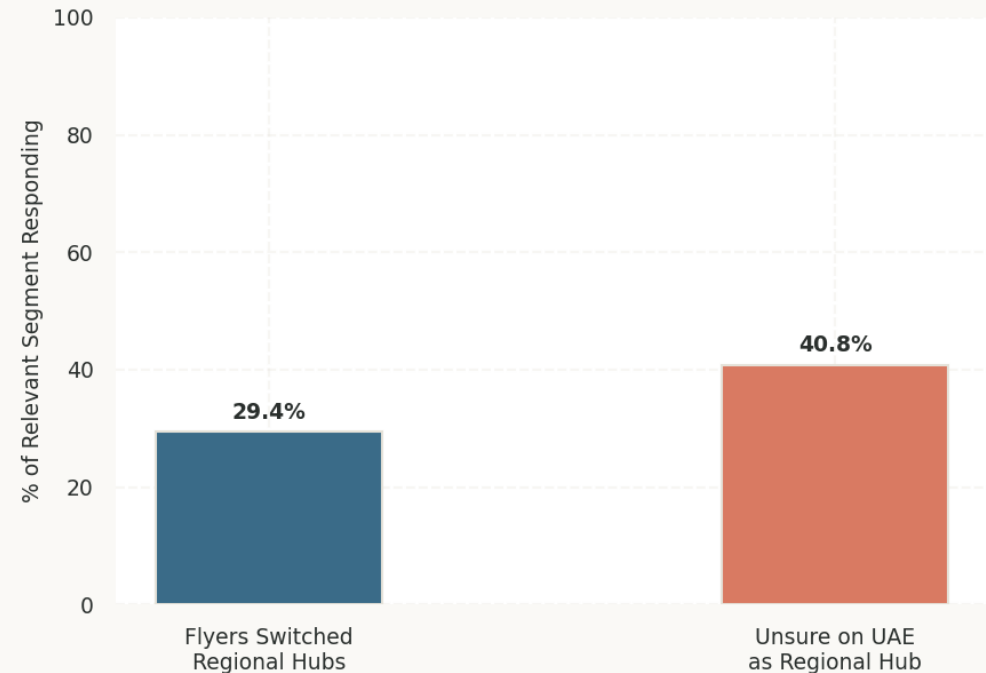
Addressing the Regional Divide

Hub Substitution Risk (29.4%): Almost 3 in 10 flyers (29.4%) have already switched regional transit hubs to secure operational consistency, favoring alternatives like Riyadh or Jeddah.

Hub Stability Uncertainty: 40.8% of business leaders remain unsure about keeping the UAE as their main regional hub long-term under current volatility.

Leveraging Resident Advocacy: Domestic UAE residents can act as powerful brand ambassadors if equipped with verified recovery details, mitigating inbound transition risks.

Vulnerability Indicators: Hub Stability Under Pressure

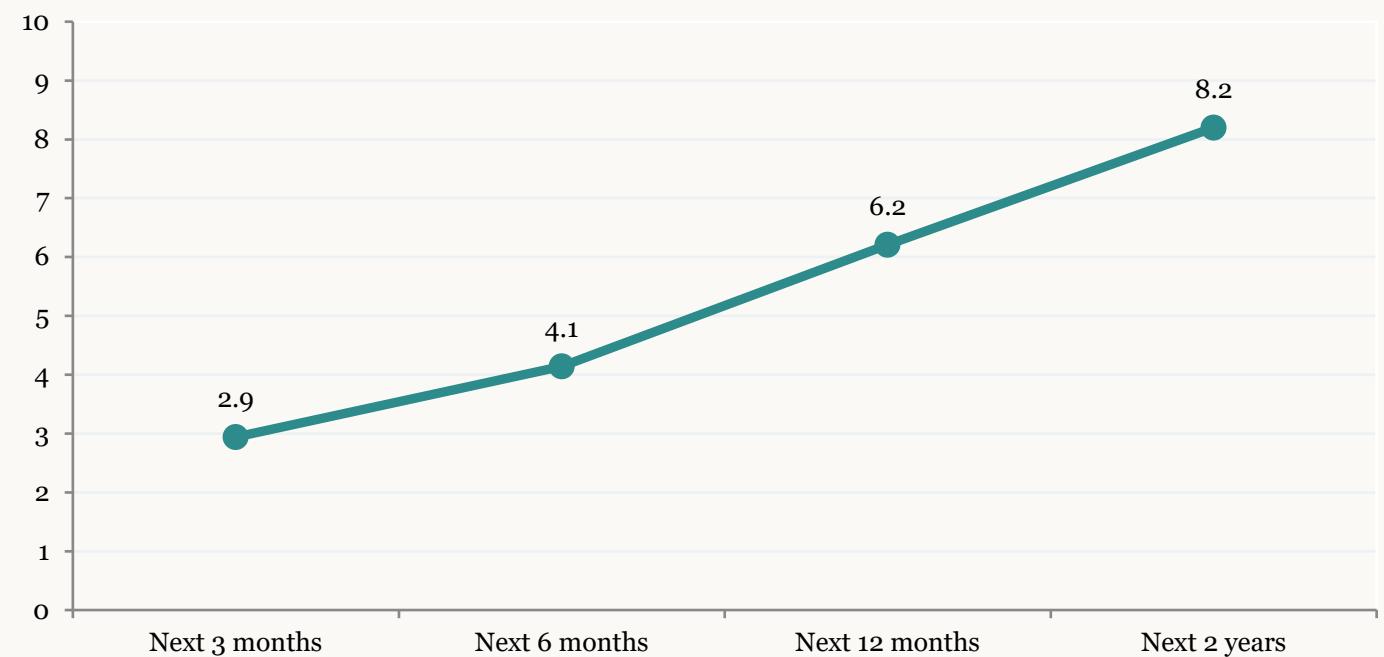


Leisure Travelers

Uncertainty continued to loom large, Stable conditions for a sustained period (73.8%) is what would bring bookings forward

Base n = 389

Mean likelihood, 0–10



Named substitutes: Singapore, Bahrain, Bali, Thailand, Vietnam

53%
Cancelled
a UAE trip

50.6%
Fear being
stranded

Not fear — friction

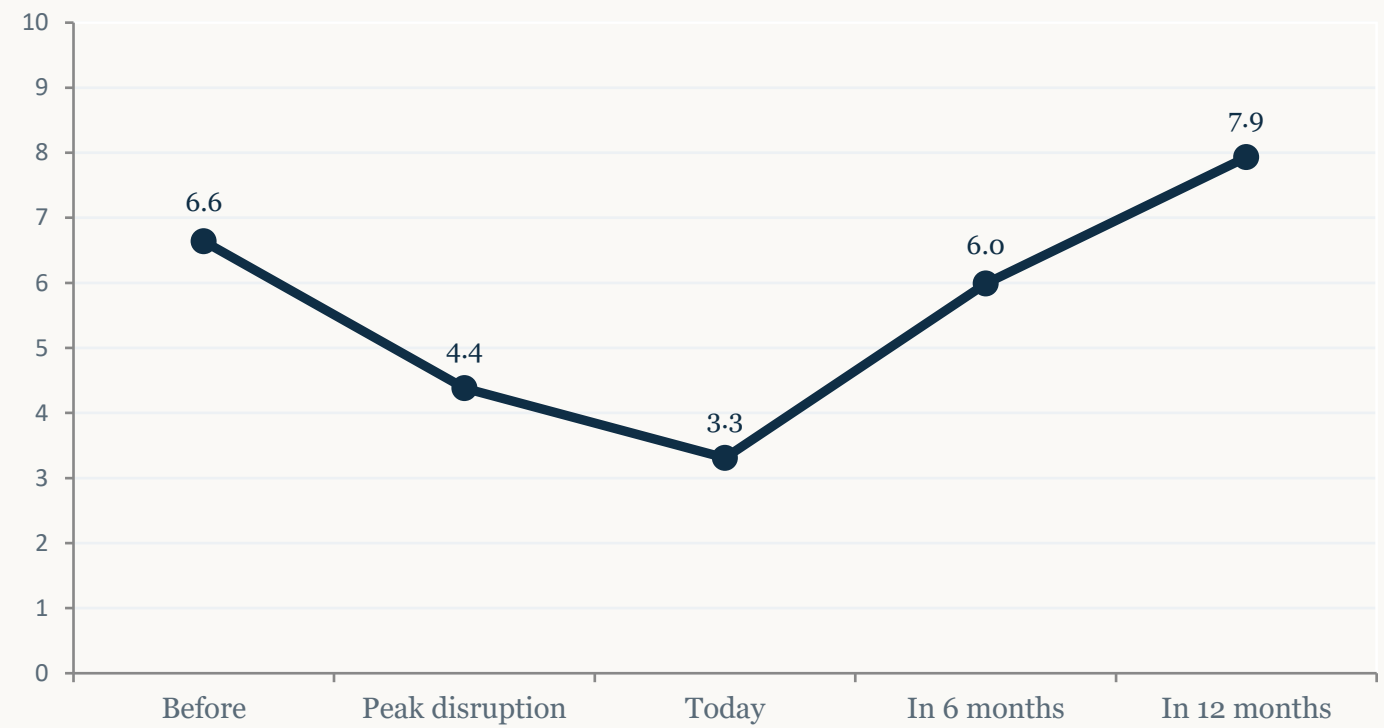
"Risk of being stranded" (50.6%) outranks "personal safety" (13.4%) by nearly four to one. Travellers are not afraid of being harmed in the UAE — they are afraid of not being able to leave on schedule

Business Community Sentiment

Reliable aviation connectivity (65.9%) is the top confidence requirement — ahead of regional stability itself, and unlike stability it is within the UAE's control

Base n = 370
Confidence is still falling — and expected to overshoot.

Mean confidence, 0–10



Confidence is still falling

Businesses feel worse today (3.3) than during the period they themselves identify as most disrupted (4.4)
This is accumulated commercial consequence, not acute alarm

- 82.2%** Cut business travel
- 50.3%** Deferred investment
- 40.8%** Unsure on UAE hub

Residents are more confident

The most confident audience — and the most exposed

70.3%

Confident in safety

Top-2-box

79.1%

Confident in recovery

Highest in the study

6.6/10

Economic optimism

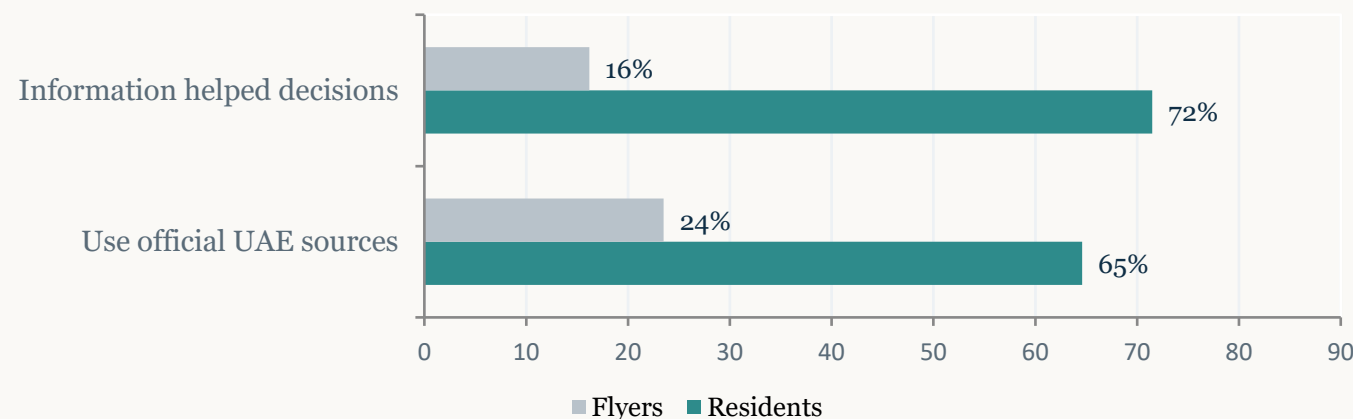
Next twelve months

5.7/10

Likely to stay 2 years

Their weakest score

Base n = 158



Access, not distance

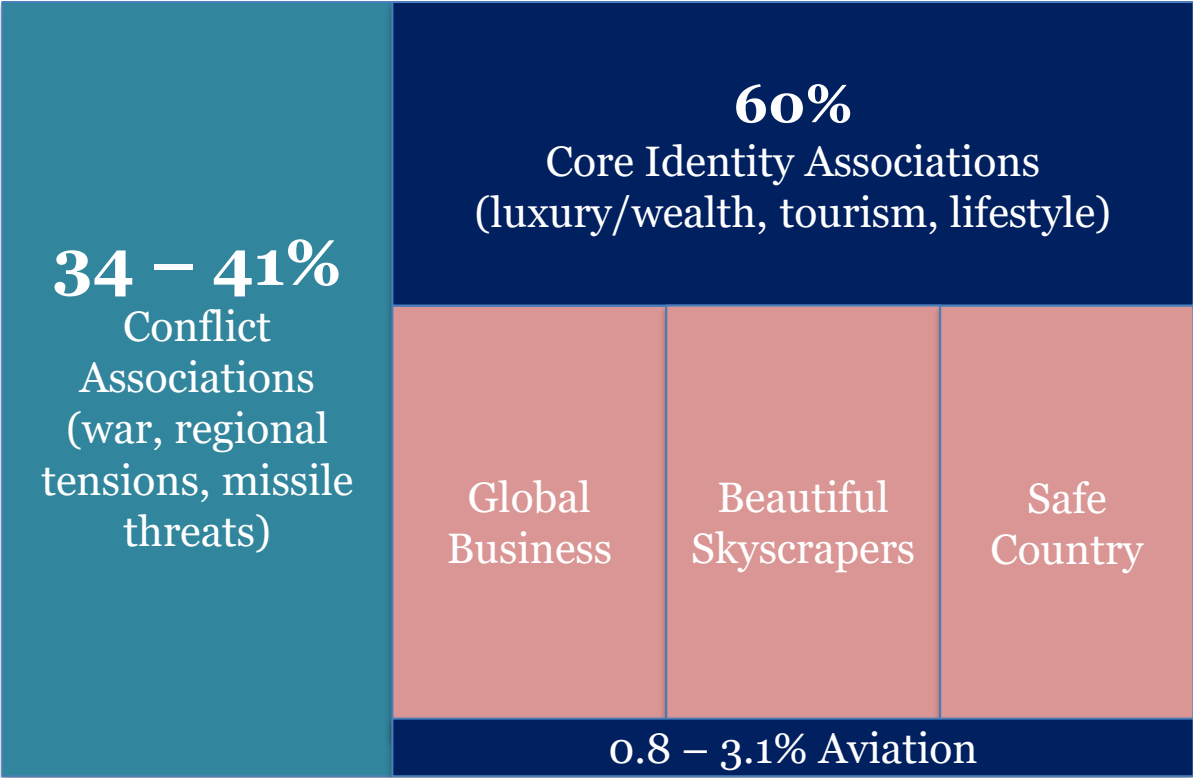
Residents reach official UAE sources at nearly three times the rate of international flyers, and rate that information far more useful

The content is working. The distribution is not — which makes this a reach problem, not a messaging problem

Conflict leads — but never commands the sentiment

The conflict is top – of – mind, but has not been able to overwrite UAE’s core economic and lifestyle identity

Residents heavily drive the luxury/wealth associations



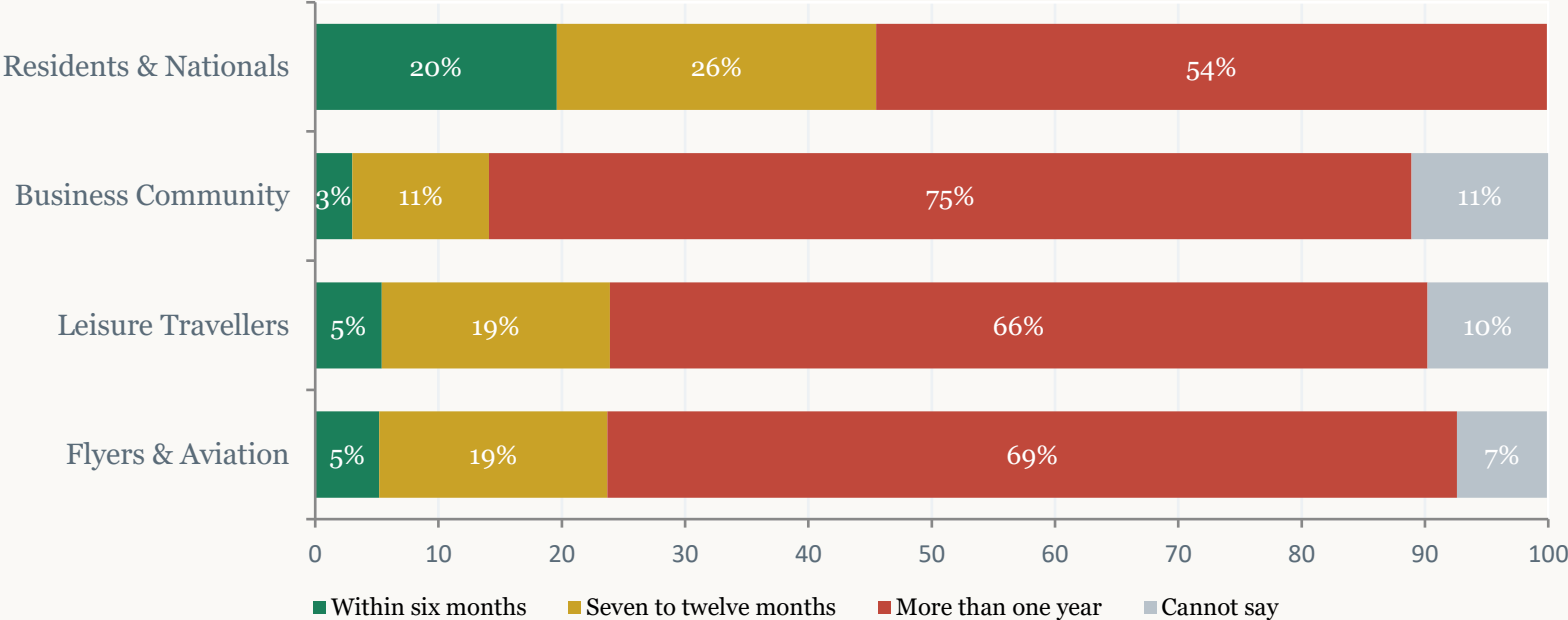
Aviation associations are invisible, despite being the most requested confidence measure in the study

% of each module base

Recovery Timelines >12 months

Corporate leaders project longer caution, while local residents anticipate rapid return

Expected time for general confidence in the UAE to return



75%

Business community

The most pessimistic audience — three in four expect over a year

<3%

In any audience

Think confidence has already recovered or will within three months

Residents are the most optimistic — 20% expect recovery within six months, four times any other audience — and also the group with the most direct daily exposure to the situation

Sentiment Segmentation

Four emotional postures toward the UAE- Four segments, one verdict: the UAE still stands

	Confident Backers	Detached	Cautious Watchers	Alarmed
Safe	20	11		
Stable	33	27		13
Resilient	74	16		
Well prepared	95	47	17	
Optimistic	9	18		10
Excited	15	32		8
Attractive	43	42		
Neutral	18	99	22	13
Cautious		22	94	42
Uncertain			68	80
Concerned		20	52	80
Vulnerable				87
Economically uncertain			12	42

Where each segment concentrates

● Flyers 40% ● Business 37% ● Leisure 39% ● Leisure 42%

Confident Backers

18.3% n=233

Well prepared, resilient, attractive. Almost no anxiety words.

88%

expect >1yr

5.9

long-term 0–10

96.6%

opinion unchanged

Detached

23.3% n=297

Neutral above all. Mildly positive, disengaged from the situation.

46.8%

expect >1yr

5.55

long-term 0–10

97%

opinion unchanged

Cautious Watchers

34.5% n=439

Cautious and uncertain — but not vulnerable. Hesitant, not alarmed.

78.6%

expect >1yr

5.37

long-term 0–10

98.9%

opinion unchanged

Alarmed

23.9% n=305

Vulnerable, concerned, uncertain. The only genuinely anxious group.

58.4%

expect >1yr

6.03

long-term 0–10

97.7%

opinion unchanged

Read as descriptive, not predictive

Thank you



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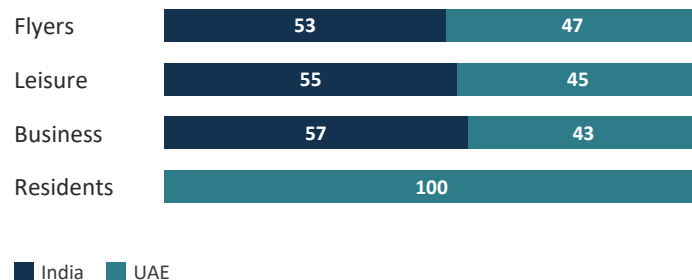
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Demographic profile

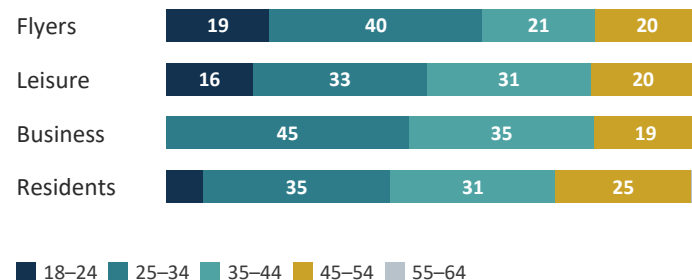
Composition of each module

BASE (n)	Flyers	357	Leisure	389	Business	370	Residents	158	Total 1,274
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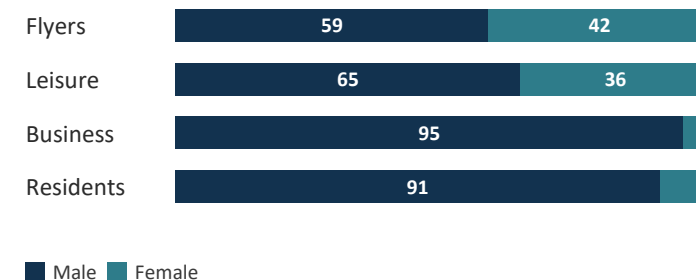
Country of Residence



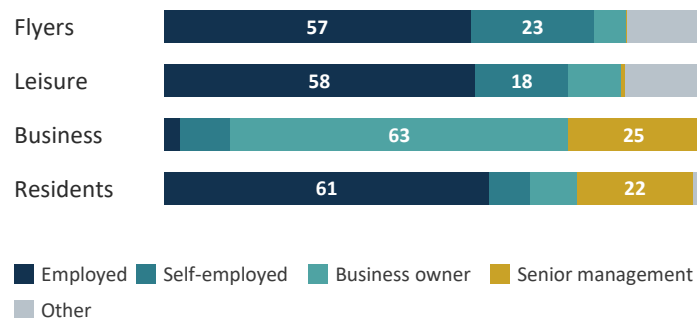
Age



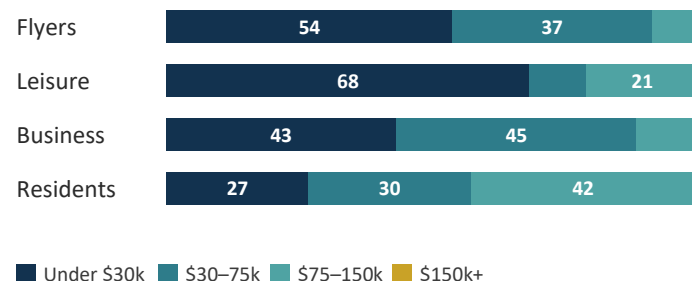
Gender



Occupation

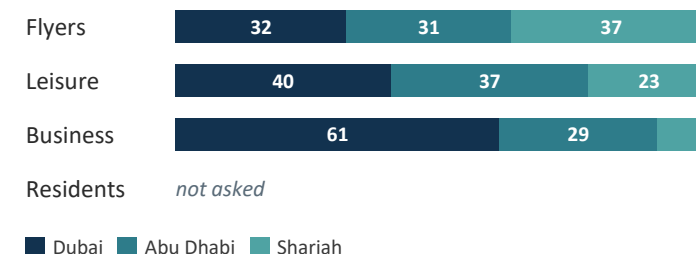


Household Income



Emirate of Residence

UAE-resident respondents only



Business module context

Organisation size: 10-49 36.5% · 50-249 45.1% · 250-999 18.4%

Sectors: Professional services 32.4% · Technology 17.6% · Tourism and hospitality 13.8%