JET HORIZON
PROPERTIES L.L.C

MARKET RESEARCH DIVISION

U A E REAL ESTATE

Market Sentiment Report

Mid-Year 2026

Confidence, buyer intent and market behaviour across Dubai and the wider UAE — read beyond the transactions.

Jet Horizon Properties L.L.C
MARKET RESEARCH DIVISION

Survey May 20 — June 18, 2026 ©
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OPENING NOTE

A Market Measured

Through the first half of 2026, conversations about markets, investment and economic stability have grown louder. Headlines intensified, sentiment shifted week to week, and intent became harder to read from transactions alone.

Amid that noise, Jet Horizon Properties' Market Research Division returned to the field. We surveyed home owners, investors, tenants, first-time buyers and brokers across the UAE and worldwide to understand how the market is felt today — what has steadied since spring, and what continues to support confidence in Dubai real estate.

The Mid-Year 2026 reading exists to help us see the market the way the people in it do. Their perspective — not the headline — is what matters most.

Beyond transactions.

JET HORIZON PROPERTIES · MARKET RESEARCH

DUBAI · SKYLINE AT FIRST LIGHT



IN THIS REPORT

Contents

SURVEY PERIOD

May 20 — June 18, 2026

SAMPLE FRAME

5 personas · UAE & worldwide

01 Cover

02 Opening Note

03 Table of Contents

04 Executive Summary

05 About the Survey

06 How to Read the Index

07 Cross-Persona Snapshot

08 Key Market Themes

09 Sentiment Distribution

10 Reality vs Headlines

11 Dubai Perception Score

12 Buyer Readiness

13 Central Market Insight

14 Comparing Sentiments

15 Market Mindset

16 What the Findings Mean

17 Final Market Outlook

18 Thank You

EXECUTIVE SUMMARY

Dubai real estate sentiment strengthened into mid-2026. Despite persistent global tension and loud international headlines, the data shows firm confidence, active buyer intent and continued belief in the city's long-term fundamentals.

Global uncertainty has made some respondents more deliberate, yet trust in Dubai's market remains intact — and slightly higher than the spring reading. The challenge is not demand. It is value alignment.

TOP MARKET CONCERN

High Prices

CONFIDENCE

Above the Crisis

> *Dubai is not facing a confidence problem. It is facing a pricing and expectation gap.*

Buyers are interested, investors remain active, tenants are open to ownership, and sellers hold their confidence. The opportunity lies in matching that confidence with realistic value.

DOWNTOWN DUBAI · AERIAL VIEW



ABOUT THE SURVEY

How the Research Was Conducted

The survey was conducted by Jet Horizon Properties' Market Research Division between May 20 and June 18, 2026, through online platforms across more than 90 countries. It gathered perspectives from home owners, investors, tenants, first-time buyers and brokers to measure sentiment, purchase intent, investment appetite, pricing concerns, and the impact of global news on confidence in Dubai's property market.

SURVEY PERIOD

May 20 — June 18, 2026

MARKET FOCUS

UAE / Dubai Real Estate

AUDIENCE GROUPS

Home Owners, Investors, Tenants, First-Time Buyers, Brokers

MAIN AREAS MEASURED

Sentiment, buyer intent, pricing concerns, global-news impact, Dubai perception

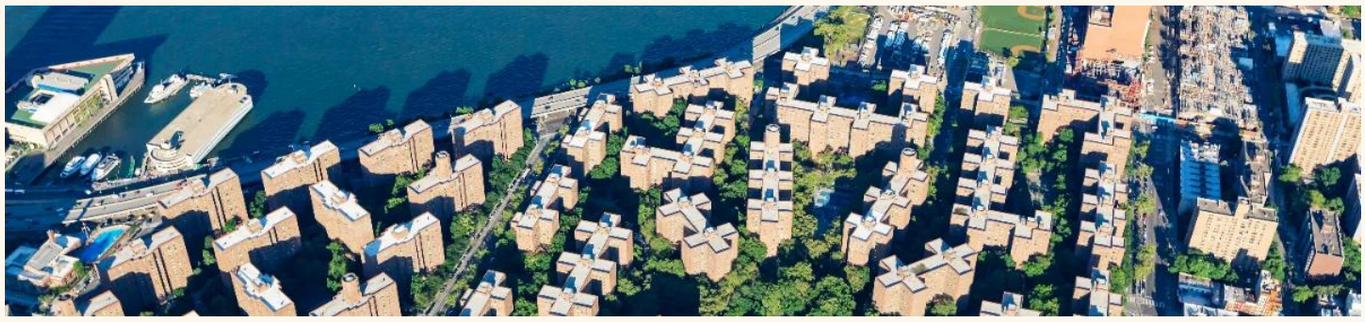
SENTIMENT SCALE

Very Positive to Very Negative

PERCEPTION SCALE

1 to 5 semantic differential scale

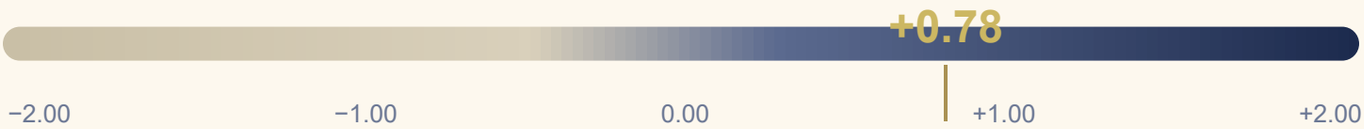
DUBAI · MODERN RESIDENCES



HOW TO READ THE SENTIMENT INDEX

Turning Opinion Into a Market Signal

The Market Sentiment Index converts opinion into a measurable score between −2 and +2. Above zero, the market is net positive; below zero, net negative. The UAE's overall score of **+0.78** places the market firmly in the balanced-positive range — confidence is strong, but selective.



−2 to −1	Strong pessimism	Widespread negative outlook; market confidence severely eroded.
−1 to 0	Cautious / negative leaning	Net hesitation; buyers and sellers not aligned on value.
0	Neutral	Balanced split between positive and negative sentiment.
0 to +1	Balanced positive ◂ current	Confidence solid; active demand with selective decision-making.
+1 to +2	Strong confidence	Highly positive; buyers and investors are engaged and motivated.

MARKET DATA · ANALYSIS



CROSS-PERSONA SNAPSHOT

One Market, Five Mindsets

Each group reads the market differently. Home owners show the strongest confidence, investors remain selective, tenants are increasingly open to ownership, first-time buyers want more clarity, and brokers see the pricing gap most clearly.

1.28

Home Owners

84.1% positive sentiment

0.46

Investors

63.2% rate UAE above global

0.31

Tenants

58.4% actively considering ownership

0.26

First-Time Buyers

35.1% transacting within 6–12 months

0.14

Brokers & Agents

Dubai perception 4.12 / 5

DUBAI · RESIDENTIAL COMMUNITY



KEY MARKET THEMES

The Five Signals Defining the Market

Dubai real estate continues to benefit from confidence, demand and global relevance. The market is not slowing because belief has faded — it is becoming more selective as buyers pay closer attention to value.

+0.78

Overall Sentiment Index

Every persona recorded a positive index — even brokers, who sit closest to deal-level friction.

67.6%

Positive on the Market

The majority continue to view Dubai real estate positively despite global uncertainty.

69.9%

In-Market Buyers

An active pool — respondents are looking, preparing to buy, or waiting for the right deal.

4.08/5

Dubai Perception Score

Strong across confidence, safety, future outlook and long-term real estate appeal.

49.5%

Confidence Boosted by Volatility

Respondents grew more confident despite negative headlines, reflecting Dubai's safe-haven status.

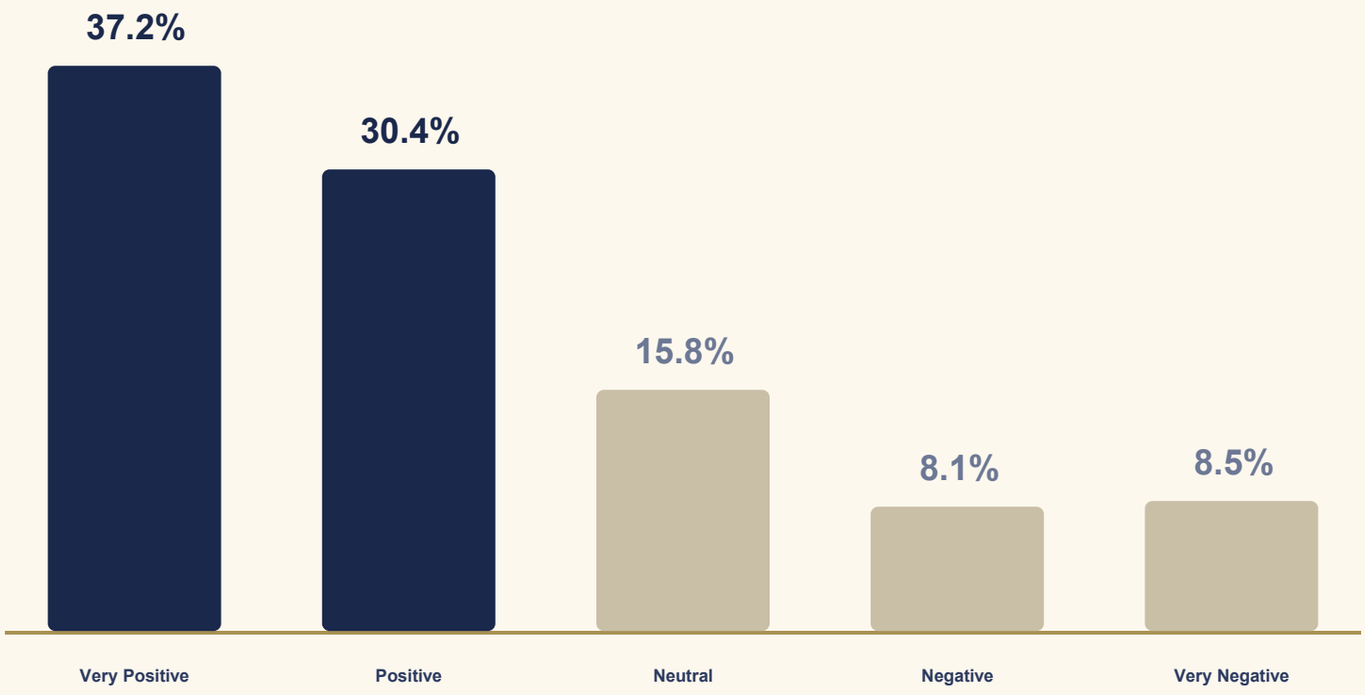
DUBAI MARINA · WATERFRONT HOMES



SENTIMENT DISTRIBUTION

Optimism Leads, But the Market Is Selective

The market is strongly positive overall, with 37.2% very positive and 30.4% positive responses. Neutral accounts for 15.8%, while negative and very negative together represent 16.6%.



This is not a one-sided market. The positive majority is clear, yet nearly one in six respondents remain negative — a realistic reading. UAE confidence is strong, but buyers are watching pricing, risk and timing more carefully.

BUSINESS BAY · SKYLINE



REALITY VS HEADLINES

The Loudest Narratives Aren't Always the Truth

The data tells a different story from the headlines. While global news created caution for some, it **increased** confidence in UAE real estate for 49.5% of respondents. Another 20.3% saw no impact at all.

Increased confidence — **49.5%**

Volatility made Dubai feel more, not less, appealing.

No impact — **20.3%**

Indifferent to the news cycle.

More cautious — **12.1%**

Watching, but not stepping away.

Reduced interest — **10.6%**

Pulled back on near-term plans.

Delayed decisions — **7.5%**

Waiting for the right window.

DUBAI · SKYLINE AT DUSK



DUBAI PERCEPTION SCORE

The Market Still Believes in Dubai's Fundamentals

Respondents rated Dubai and the wider UAE strongly across four perception dimensions — safety, value, timing and future outlook. The composite score stands at **4.08 / 5**.

Safety Risky vs Safe — **4.11**/5

75.4% Positive **10.2%** Neutral **14.4%** Negative

Value Overpriced vs Good Value — **4.03**/5

73.6% Positive **9.8%** Neutral **16.6%** Negative

Timing Wait-Watch vs Invest — **4.06**/5

74.2% Positive **9.6%** Neutral **16.2%** Negative

Future Uncertain vs Bright Future — **4.12**/5

76.1% Positive **8.7%** Neutral **15.2%** Negative

UAE PERCEPTION COMPOSITE SCORE

4.08

/ 5

Future outlook is the strongest dimension.

The strongest score is Dubai's future outlook. Buyers and investors are not only reacting to today's prices — they are weighing the city's long-term growth story.

DOWNTOWN · BURJ KHALIFA DISTRICT



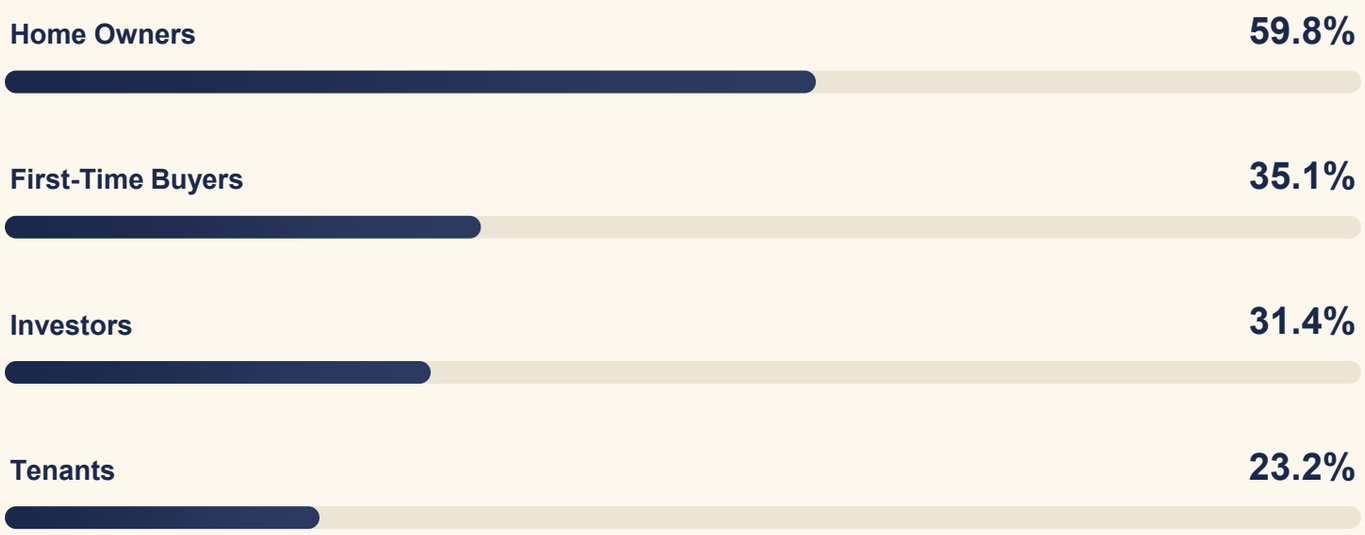
BUYER READINESS

Planning to Purchase Within the Next 12 Months?

46.2%

overall readiness to buy within 12 months — up from the spring reading.

READINESS BY PERSONA



The buyer pool remains active, but decision-making is more selective. Respondents are not stepping away from the UAE market — they are looking for the right value and the right timing before taking the next step.

PALM JUMEIRAH · SIGNATURE VILLA



CENTRAL MARKET INSIGHT

Confidence Is Not the Problem. Alignment Is.

Every persona scores the UAE above 3.85 / 5 on perception — confidence in the city is intact. The question is not whether people believe in Dubai. It is whether buyers, sellers and investors can align on price, timing and value.

DEMAND	**Visible, but selective** Every persona sits above 3.85 / 5 in city perception. Confidence is intact.
PRICING	**The negotiation gap** Buyers want stronger value; sellers want stronger prices. Brokers see it in real time.
NEXT PHASE	**Data & transparency** The market will reward informed decision-making over headlines.

> *The UAE market is not facing a confidence gap. It is facing a value-alignment gap.*

DUBAI · FINANCIAL DISTRICT

COMPARING SENTIMENTS

What Are the Key Differences?

Confidence is high — but value still matters.

1.28
SENTIMENT

Home Owners
59.8% ready to buy

Believe in the market, but becoming more selective.

0.46
SENTIMENT

Investors
63.2% prefer the UAE

Open to ownership when the opportunity feels right.

58.4%
CONSIDERING BUYING

Tenants
4.01 / 5 perception

Interested, but need more clarity before moving.

35.1%
PLANNING TO BUY

First-Time Buyers
33.2% unfamiliar with the process

See an active market, but expectations are shifting.

0.14
SENTIMENT

Brokers & Agents
4.12 / 5 perception

Closest to deal friction, yet still net positive.

DUBAI · LUXURY INTERIOR



What Each Audience Is Telling Us

AUDIENCE	CURRENT MINDSET	MAIN BARRIER	KEY TAKEAWAY
Home Owners	Confident and opportunity-seeking	Prices feel high	**Looking for more value**
Investors	Selective and analytical	Market uncertainty	**Data and returns guide decisions**
Tenants	Interested but cautious	Affordability	**Needs a practical pathway**
First-Time Buyers	Curious but unsure	Lack of process knowledge	**Education can reduce hesitation**
Brokers / Agents	Practical and cautious	Price mismatch	**Activity exists, expectations need alignment**

The strongest opportunity is not simply to promote available properties. It is to address the emotional and practical hesitation behind each audience group.

A NEW HOME · HANDOVER



WHAT THE FINDINGS MEAN

Guidance for Buyers, Sellers and Investors

For Buyers

Dubai remains a confident market, but compare value carefully, review recent transactions, and weigh each property's long-term potential before deciding.

For Sellers

Strong confidence does not remove the need for realistic pricing. Sellers who understand buyer expectations and price accurately attract more serious interest.

For Investors

Focus on fundamentals — location, developer credibility, rental demand, payment structure, capital-appreciation potential and exit strategy.

For Tenants

Many tenants are already considering ownership. Clarity on mortgage eligibility, payment plans and rent-versus-own comparisons makes the decision clearer.

For First-Time Buyers

Understand the process before entering the market. Clarity on fees, financing, off-plan versus ready property and legal steps reduces uncertainty.

DUBAI · NEW RESIDENCES



FINAL MARKET OUTLOOK

Not Slowing Down. Becoming More Selective.

UAE real estate enters the next phase of 2026 with positive sentiment, active demand and continued global appeal. The market is not defined by hesitation. It is defined by selectivity.

01

Buyers are ready

but they want stronger proof.

02

Investors are interested

but they need guidance.

03

Tenants are open to ownership

but expectations must align with the market.

04

Sellers remain confident

but they want the right price.

The strongest opportunities will come from understanding where confidence meets value.

JET HORIZON RESEARCH · SENTIMENT 2026

DUBAI · THE HORIZON AHEAD



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THANK YOU

Thank You for Sharing Your Perspective

Thank you to everyone who took part in the UAE Real Estate Market Sentiment Survey — Mid-Year 2026. Your responses helped shape a clearer picture of how buyers, investors, tenants, first-time buyers and real estate professionals view the market today.

This report reflects your confidence, concerns, expectations and outlook at an important moment for UAE real estate. We appreciate your time, your insight and your contribution to a more informed market conversation.

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Your Property, Our Priority

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