Market and Trade Profile: GCC

September 2021

Destination Bristol ©Gary Newman

Overview

- **‘Chapter 1: Inbound market statistics’** provides insights on key statistics about Gulf travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **‘Chapter 2: Experiences and perceptions’** features details about what visitors from the GCC are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by people from the Gulf in general are also highlighted.
- **‘Chapter 3: Understanding the market’** takes a close look at consumer trends in the GCC, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach GCC consumers are indicated, too.
- **‘Chapter 4: Access and travel trade’** shows how people from the GCC travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the GCC travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that the majority of this report refers to the market conditions for travel from the GCC to the UK prior to the COVID-19 pandemic, and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available.

Contents

Chapter 1: Market statistics

Chapter 2: Experiences and perceptions

Chapter 3: Understanding the Market

Chapter 4: Access and Travel Trade

Appendix:

How to use this document

- VisitBritain's Market Profiles are intended as **comprehensive summaries** of available data and insights for key inbound markets to the UK.
- Data is provided in as much detail as possible, across a range of topics. They are best used as **reference documents**, rather than being read from start to finish. For further information on a market, please consult the links in the Appendix.
- To help the reader to find data which will be helpful to them, we have used signposting and summaries throughout.
- To read key summary data points about this market, turn to the Executive Summary.
- Within each Chapter, there are **summary slides** to introduce data on the following slides.
    - **Chapter 1** summaries: 1, 2, 3
    - **Chapter 2** summaries: 1, 2
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Executive Summary

1: Inbound market statistics

Chapter summary

- The Gulf Cooperation Council (GCC) comprises six countries: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE. Despite some differences, there are many similarities in their economies, culture and travel trends.
- If considered as a single market (as standard inbound rankings do not consider GCC as a single market), the Gulf would be the 2nd most valuable for Britain when it comes to visitor spending. Spend per visit is far higher than the global average. The UAE had the highest visits, nights and spend in 2019 compared to the other GCC markets.
- A high proportion of visits from GCC are made by UK expats, meaning that visiting friends and relatives is the second most prominent motivator to visit, after a holiday trip.
- 82% of Gulf holidaymakers in the UK are repeat visitors, much above the global average of 63%.*
- The most popular time of year to visit the UK is the summer, with Gulf visitors appreciating the relatively cooler climate.
- Due to the COVID-19 outbreak, visits from the GCC to the UK decreased by 11% in the first three months of 2020 compared with those months in 2019, down to 194,000. In Q1 2021, visits from the GCC decreased by 96% compared to Q1 2020, down to 7,600**.

Source: International Passenger Survey by ONS. Please note that market-level inbound statistics have not been produced for full-year 2020; see p. 11 for more.

*excluding nil nights and British nationals **small base, air departures only

2019:
£2.6bn spent in the UK

2: Experiences and perceptions

Chapter summary

- Gulf residents have positive perceptions of Britain; their top associations with the UK reveal an appreciation for our awe inspiring landscapes, vibrant and buzzing cities and the potential for luxury experiences.
- Gulf visitors' favourite activities in the UK are dining in restaurants, going shopping and visiting parks or gardens.
- They are more likely to go shopping than other markets, and are most likely to buy clothes, shoes, cosmetics, toiletries and personal accessories.
- They are less likely than other markets to go on guided tours, or visit museums, art galleries and other built heritage sites while in the UK.
- 96% of Gulf visitors felt welcome in Britain, and 97% would recommend Britain to others, similar to the all market average.

Source: Arkenford 2013, International Passenger Survey by ONS, VisitBritain/IPSOS 2020, VB/Kubi Kalloo 2018

Gulf visitors come to the UK for…

The climate, vibrant cities and the countryside/natural beauty

3: Understanding the market

Chapter summary

- All GCC countries are monarchies with a strong Arab heritage and culture, although most markets' populations have a high proportion of immigrants. As these migrants and expats come from a diverse range of Western countries and South Asia, English is commonly used, and is also quite important in the media landscape, alongside the Pan-Arab TV channels.
- The UAE is unique within the GCC for its high proportion, and variety of, expat residents. Research in early 2021 revealed that UK expats in the UAE spend on average 10.7 days on a visit to the UK, and spend on average £1,250 during their trip. To generate an additional £1m in inbound spend, the UK would need to encourage just under 1% of the UAE expat population to spend an extra 4 nights in the UK each year.
- Trust is important in the Gulf culture. Recommendations from friends and relatives, or people whose opinions they know and trust, like social media influencers, are key sources of influence in these markets when choosing a holiday destination.
- Destination choice can be made quite late as Gulf travellers usually have shorter lead-in times than most other markets.
- As a key luxury market, wealthy Gulf travellers may look for luxury hotels or stately homes to stay at, offering high-standards of services, ensuring their privacy and personalisation to their preferences. Shopping and authenticity are important to them. London is the British destination they are more likely associate with a luxury holiday.

Source: VisitBritain/IPSOS 2016, CIA World Factbook, VB/Kantar Millward Brown 2017 research, VisitBritain/Kubi Kalloo 2021

86%

of Gulf luxury travellers have Britain on their travel bucket list

4: Access and travel trade

Chapter summary

- Nearly all GCC visits to the UK were made by plane in 2019 (97%).
- Direct seat capacity from the GCC to the UK increased by 76% in the ten years to 2019, with the rise of the national carriers as leading airlines. Over half of the direct capacity between the Gulf and the UK in 2019 linked Dubai (UAE) to British airports.
- As the main Gulf airports developed into natural connecting hubs between the Asia Pacific region and Europe, more routes to the different nations and regions of Britain were launched.
- Due to the COVID-19 outbreak, seat capacity between the GCC and the UK was down by 56% in 2020 compared to 2019. Seat capacity in 2021 to date (January-September) is 96% lower than the same period in 2019. However, scheduled seats are set to increase each month towards the end of the year, thanks to more favourable policy conditions for inbound travel.
- Understanding the culture of the markets and meeting in person are important to build trusting business relationships in the GCC.

Source: Apex Rdc, International Passenger Survey by ONS

-56%

seat capacity between the GCC and the UK in 2020 vs. 2019

Inbound market statistics

Chapter 1

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1.1 Key statistics

Key insights

- The GCC outbound markets are among the most valuable, with nationals being very high spenders when they travel abroad. Excluding Bahrain, UK is their favourite destination in Western Europe.
- Considering all GCC countries together, the Gulf market would be Britain's 9th largest source market in terms of visits and 2nd most valuable for visitor spending in 2019*.
- Almost half of visits from the GCC are made by UAE residents. However, there is a high proportion of visits made by UK expats: they accounted for 36% of all visits from the UAE in 2017-2019, compared to 35% Emirati nationals.
- 50% of visits are made for holidays (2017-2019), followed by visiting friends and relatives (VFR) at 32%. However, the importance of VFR is skewed towards the high proportion of UK expats' visits.
- Due to the COVID-19 outbreak, visits from the GCC to the UK decreased by 10% in the first three months of 2020 compared with those months in 2019, down to 194,000. In Q1 2021, visits from the GCC decreased by 96% compared to Q1 2020, down to 7,600**.

2nd
most valuable inbound market for the UK (2019)*

Source: International Passenger Survey by ONS. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here: https://www.visitbritain.org/2020-inbound-data

*If considered as a single market (as standard inbound rankings do not consider GCC a single market) **small base

1.1 Key statistics: global context

Global context (2019)

Measure	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
International tourism expenditure (US$bn)	>4.1	15.8	>4.1	9.5	15.1	26.7
Global rank for international tourism expenditure	>50	23	>50	35	24	14
Number of outbound overnight visits (m)	1.4	4.4	1.9	0.7	9.3	3.7
Most visited destination overall	Saudi Arabia	Saudi Arabia	UAE	UK	Kuwait	Saudi Arabia
Most visited destination in Western Europe	France	UK	UK	UK	UK	UK

Source: UNWTO, Oxford Economics

1.1 Key statistics: 10 year trend

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	145%	100%	204%
2009	494	7,405	857
2010	446	6,256	788
2011	519	7,238	927
2012	566	6,697	1,287
2013	644	9,572	1,671
2014	675	9,414	1,636
2015	777	11,340	1,797
2016	954	11,960	1,918
2017	1,024	14,807	3,011
2018	1,097	13,424	2,332
2019	1,211	14,831	2,606
Share of UK total in 2019	**3.0%**	**5.1%**	**9.2%**

Due to the COVID-19 outbreak, visits from the GCC to the UK decreased by 10% in the first three months of 2020 compared with those months in 2019, down to 194,000. In Q1 2021, visits from the GCC decreased by 96% compared to Q1 2020, down to 7,600**.

Source: International Passenger Survey by ONS **small base, air departures only

1.1 Key statistics: latest figures

Inbound travel to the UK overview

Measure	GCC	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
Visits (000s, 2019) • Rank out of UK top markets	1,211 • 9*	42 • 62	181 • 43	40 • 64	175 • 44	221 • 34	553 • 20
Nights (000s, 2019) • Rank out of UK top markets	14,831 • 5*	377 • 69	2,171 • 36	584 • 57	3,064 • 22	3,509 • 20	5,126 • 15
Spend (m, 2019) • Rank out of UK top markets	2,606 • 2*	£76 • 54	£406 • 20	£79 • 53	£548 • 16	£627 • 13	£869 • 9
Nights per visit (2017-2019) • Overall • Holiday	• 13 • 11	• 12 • 12	• 14 • 10	• 18 • 11	• 16 • 13	• 17 • 12	• 10 • 10
Spend per night (2017-2019) • Overall • Holiday	• £185 • £251	• £201 • £206	• £193 • £249	• £96 • £138	• £175 • £229	• £212 • £301	• £177 • £245
Spend per visit (2017-2019) • Overall • Holiday	• £2,385 • £2,710	• £2,465 • £2,441	• £2,697 • £2,598	• £1,697 • £1,527	• £2,800 • £2,955	• £3,532 • £3,510	• £1,730 • £2,328

Source: International Passenger Survey by ONS, *If considered as a single market (as standard, inbound rankings do not consider GCC a single market)

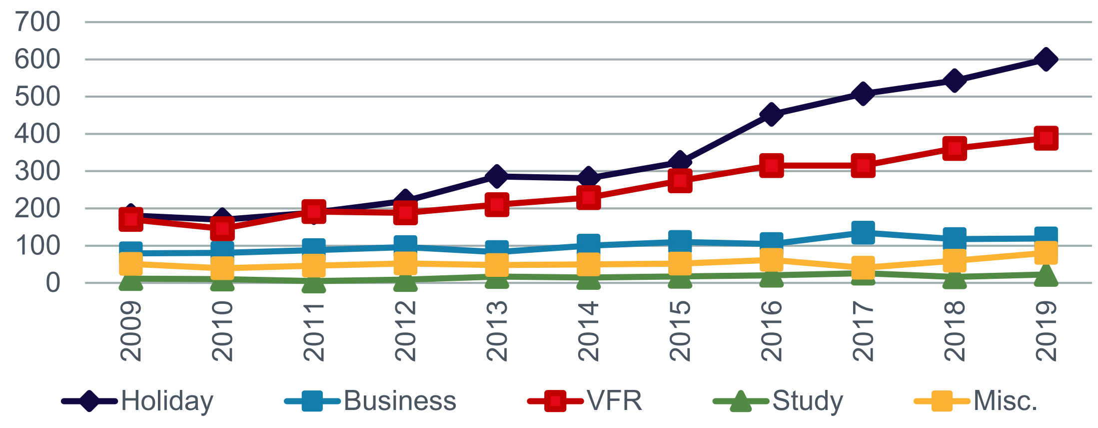
1.1 Key statistics: journey purpose

Journey purpose 2017-2019

Share of visits for…	Holiday	Business	VFR	Study	Misc.
Bahrain	54%	9%	29%	1%	6%
Kuwait	67%	4%	19%	2%	8%
Oman	44%	12%	35%	4%	5%
Qatar	50%	9%	36%	1%	4%
Saudi Arabia	59%	8%	24%	5%	4%
UAE	39%	16%	39%	1%	6%
GCC	50%	11%	32%	2%	5%
All markets	41%	22%	30%	1%	6%

- Looking at the GCC as a whole, visitors from this region are most likely to come to the UK for a holiday trip, with 50% of visits being for this purpose. The next most prominent purpose is to visit friends and relatives, at 32%, and then business, at 11%.
- At a market level, UAE is the country in the Gulf where visiting friends and relatives is the most prominent; an even proportion to holidaymakers. The UAE is also the source of the highest proportion of business visitors.

Journey purpose trends (visits 000s)



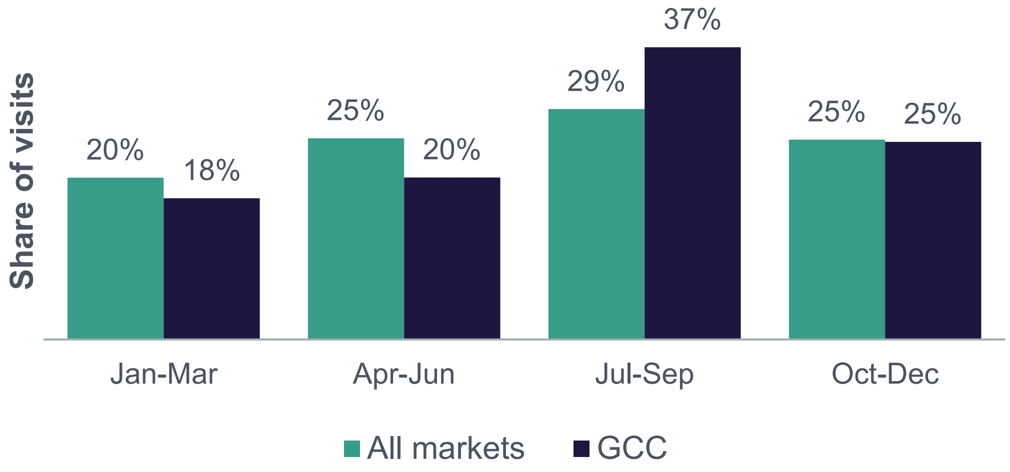
- Holiday visits and visits to friends and relatives (VFR) accounted for 82% of all visits from the GCC to the UK in 2019.
- Those two types of visits largely account for most of the increase in visitors from the Gulf to the UK since 2009, as business visits, studying trips and visits for miscellaneous purposes remained relatively stable over the last several years.
- In terms of value, 57% of inbound Gulf spending in the UK came from holiday visitors in 2019.
- While both business and holiday visitors from the Gulf spent more on average per visit and per night in 2019 than those visiting friends or relatives, the latter stayed longer.

Source: International Passenger Survey by ONS

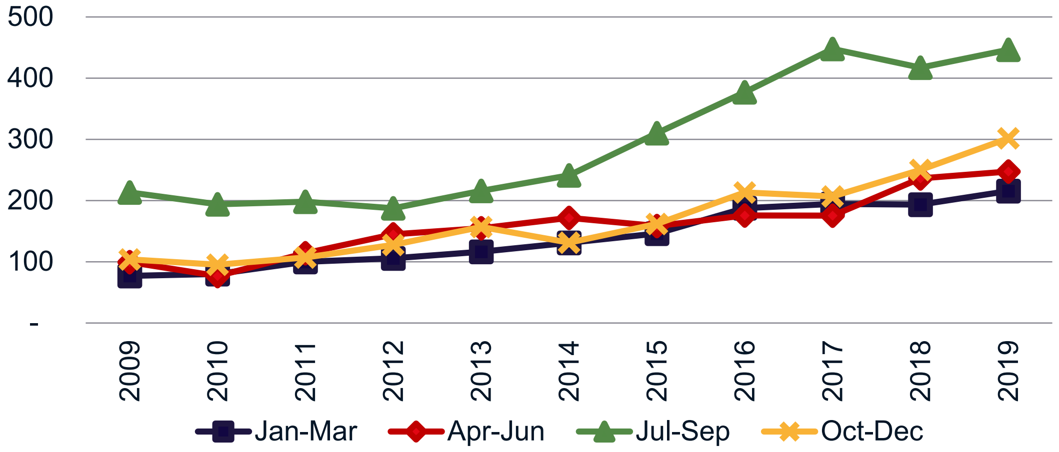
VisitBritain VisitEngland

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

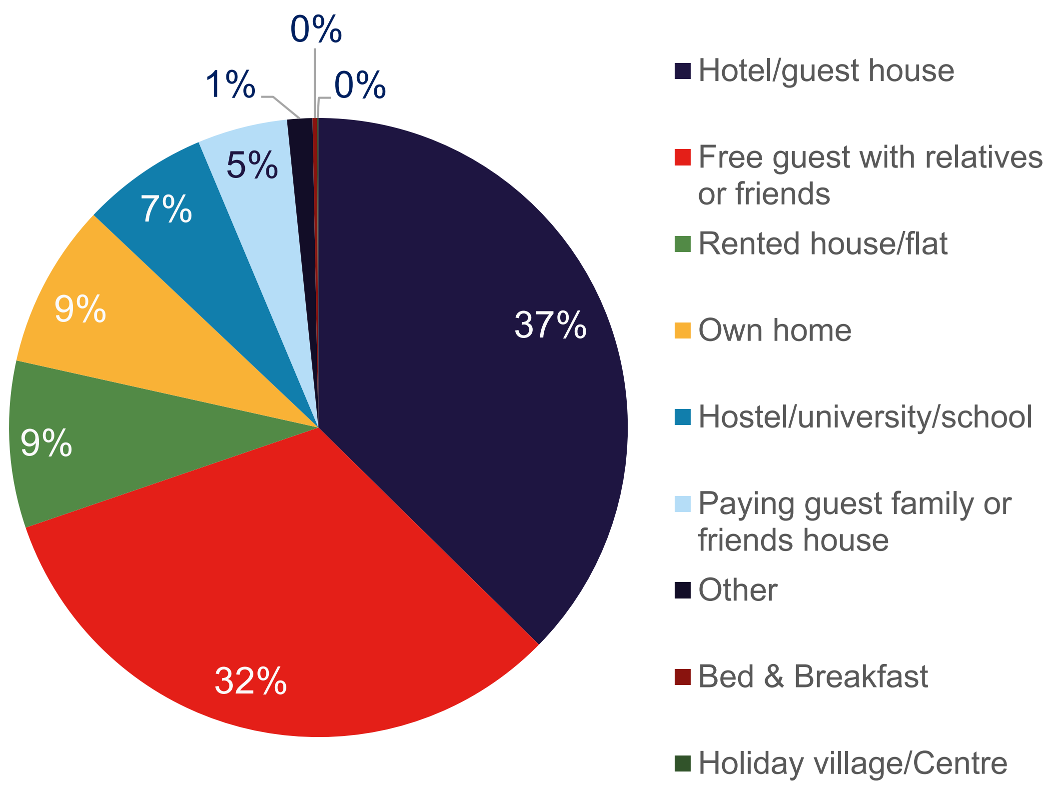


- GCC visitors tend to come to the UK in the summer months: in 2019, just under 4-in-10 visits from the GCC overall to the UK were made between July and September.
- All individual Gulf markets also follow the pattern of a strong third quarter: it is the time of the year when temperatures in the Gulf are at their highest. For this reason, many go on holiday in places where the climate is milder during the summer months.
- Trends in seasonal visits have remained relatively consistent from 2009 to 2019, with volume of visits in the third quarter growing steeply from 2012 to 2017, before a slight dip in 2018 and bounce back in 2019.

Source: International Passenger Survey by ONS

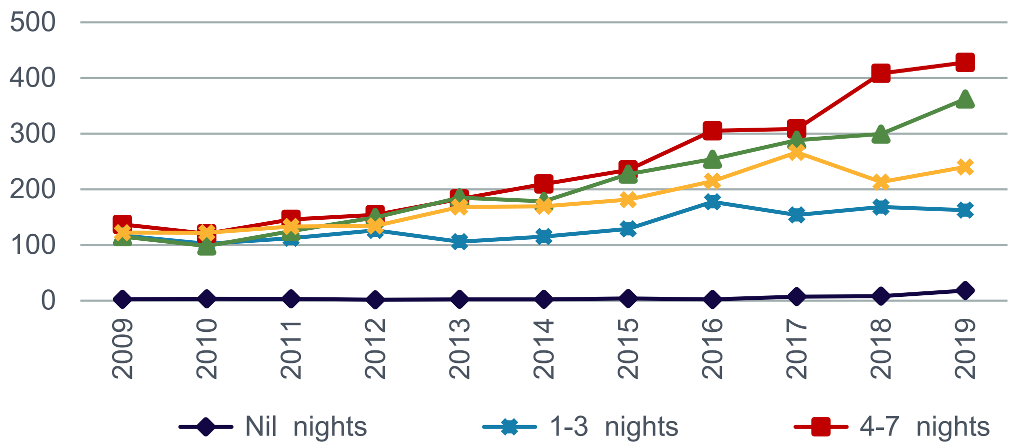
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Note: please read the pie chart clockwise

Duration of stay trend (visits 000s)

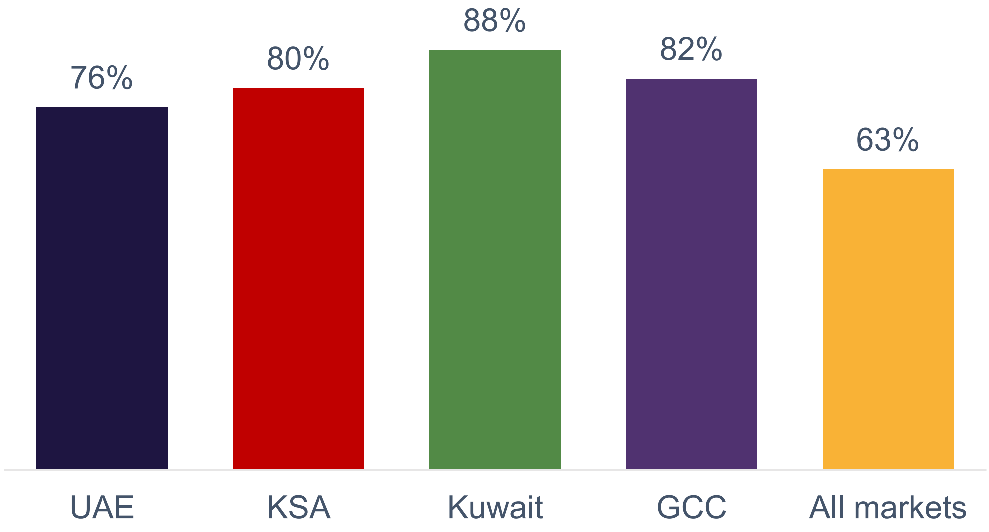


- Gulf visitors tend to stay longer than most markets: in 2019 they stayed in the UK for 12 nights on average, compared to just 7 across all markets. However, this varies quite a lot depending on the individual market, with UAE visitors staying 9 nights on average while Qatari visitors stay on average 18 nights.
- Visitors from the Gulf are most likely to stay in hotels/ guest houses or for free with relatives or friends.
- Gulf visitors spent 9% of their nights in the UK in 2019 at a home they own; well above the 1% across all markets.

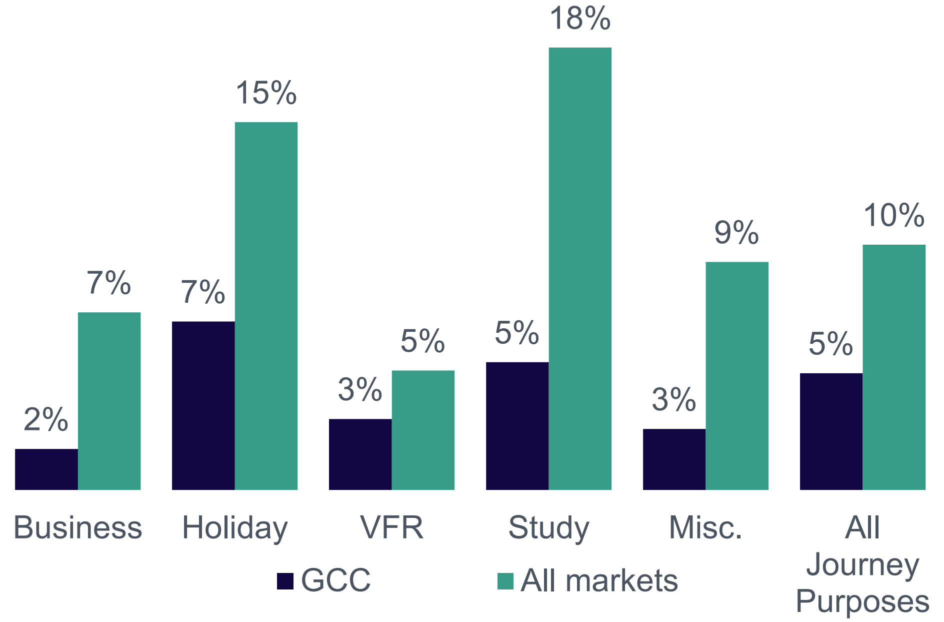
Source: International Passenger Survey by ONS. Accommodation UAE and KSA only

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- GCC is a very mature market: in 2015, 82% of holiday visits from Gulf residents (excluding British expats) to the UK were made by repeat visitors, compared to 63% across all markets.
- The proportion of Gulf holiday visits to the UK bought as part of a package, or all-inclusive tour, is far lower than the global average for such visits in 2019.

International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

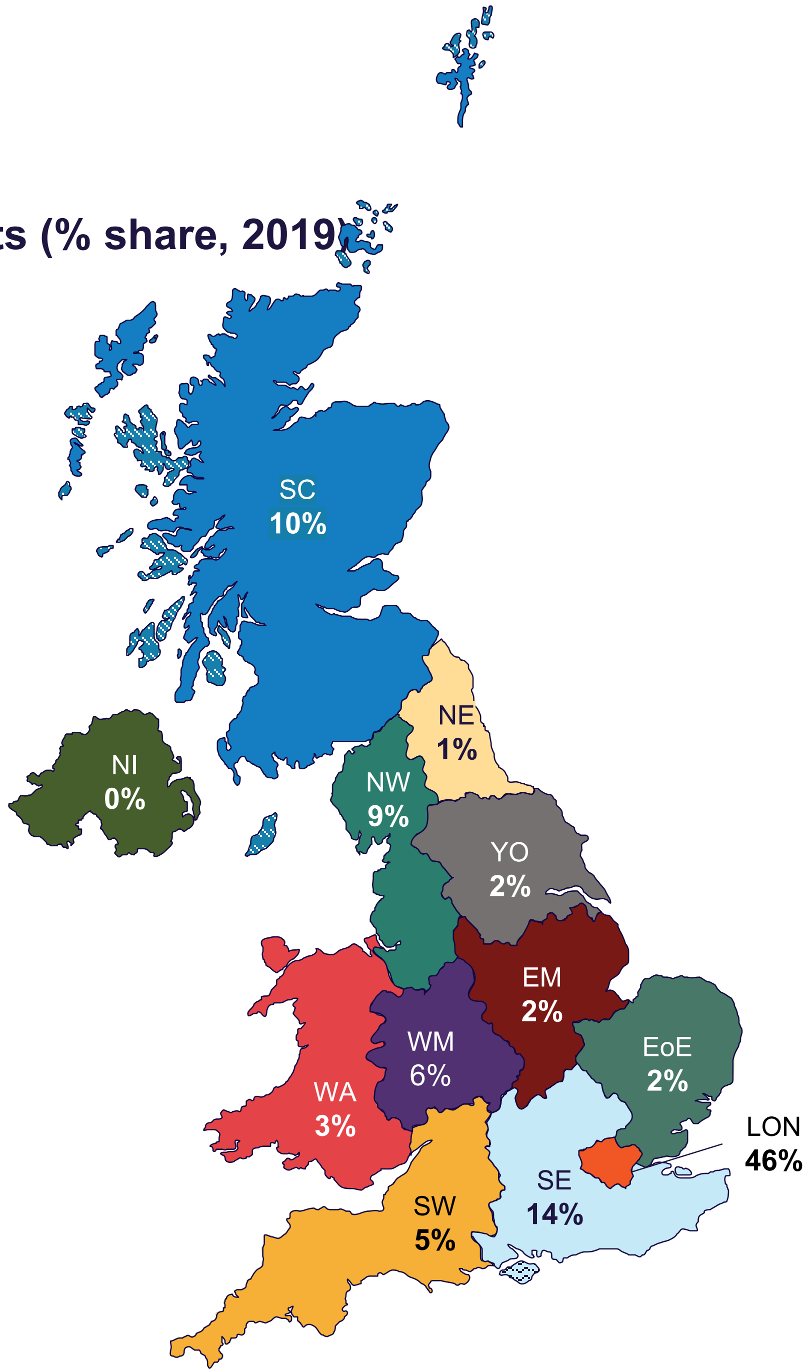
1.2 Getting around Britain

Annual visits to the UK (2019)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	14,827	1,208	2,603
Scotland (SC)	1,538	118	151
Wales (WA)	451	35	23
Northern Ireland (NI)	6	2	1
London (LDN)	6,806	802	1,860
North East (NE)	219	14	43
North West (NW)	1,342	125	158
Yorkshire (YO)	271	23	29
West Midlands (WM)	868	61	56
East Midlands (EM)	368	23	39
East of England (EoE)	253	34	26
South West (SW)	694	37	43
South East (SE)	2,004	141	172
Nil nights (Nil)	N/A	18	1

Source: International Passenger Survey by ONS

Nights (% share, 2019)



1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019)*

Town	Visits (000s)
London	452
Manchester	36
Edinburgh	33
Glasgow	28
Birmingham	11

Regional spread (2019)

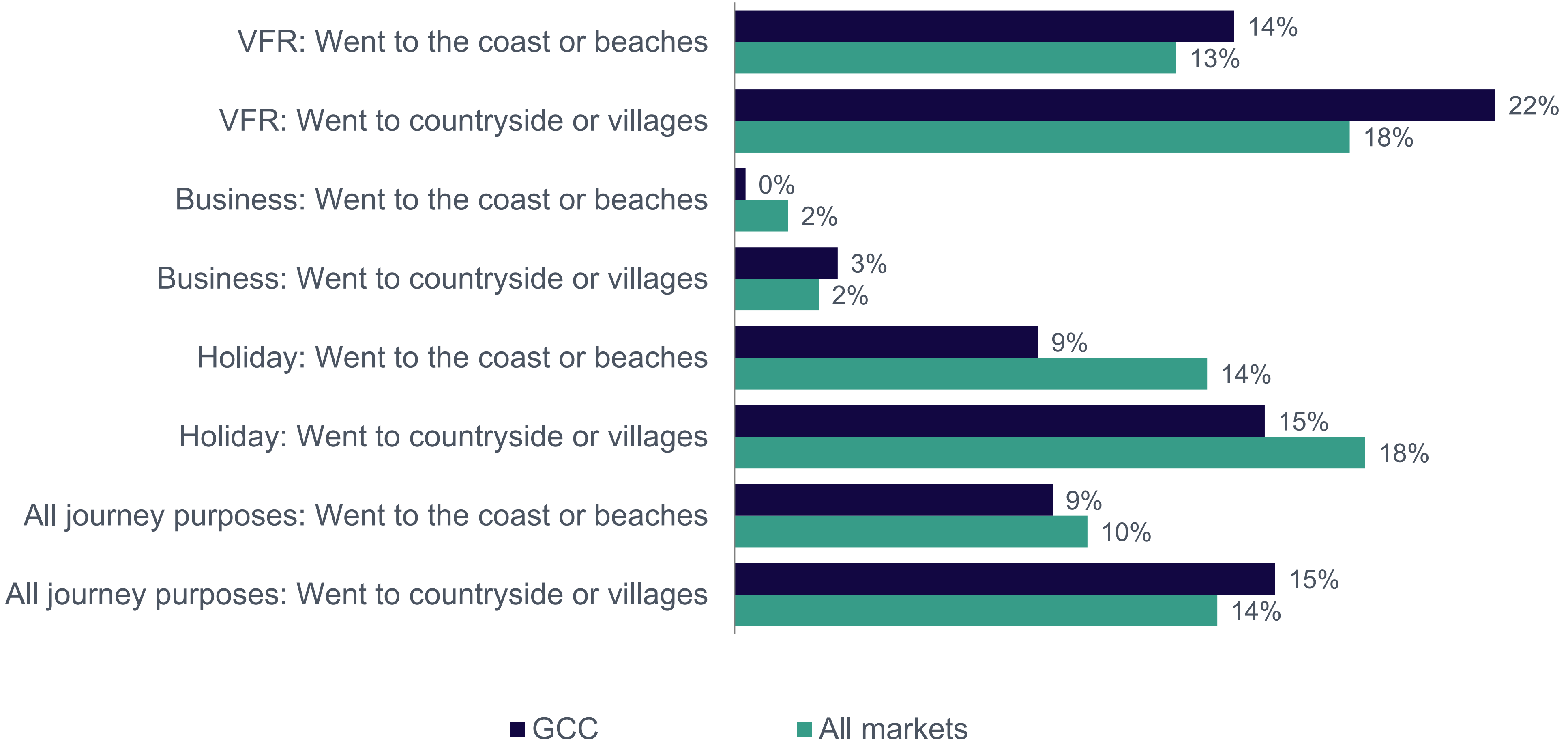
Share of nights…	Scotland	Wales	London	Rest of England	Northern Ireland
Bahrain	4%	1%	49%	46%	-
Kuwait	2%	7%	61%	30%	-
Oman	12%	21%	26%	41%	-
Qatar	18%	3%	34%	45%	<1%
Saudi Arabia	7%	0%	53%	40%	<1%
UAE	12%	2%	44%	42%	-
GCC	10%	3%	46%	41%	<1%
All markets	9%	2%	41%	46%	1%

- London is the leading destination for a trip to Britain; in 2019 46% of the nights spent by GCC visitors in the UK were in the city.
- When looking at individual towns and cities visited, London is followed by Manchester, Edinburgh, Glasgow and Birmingham.
- GCC visitors also spent more nights in London than the rest of England in 2019: 46% of all nights for London vs. 41% for the rest of England.
- Gulf visitors are more likely than average to spend time in Scotland (10% vs. 9%) and Wales in 2019 (3% vs. 2%), but less likely to spend time in Northern Ireland.
- When looking at individual markets, Kuwaitis spend the most time in London longer compared to other GCC visitors: they spent 61% of their nights in the UK there in 2019. In contrast, visitors from Oman only spent 26% of their nights in London in the same time period.
- Visitors from the GCC are more likely to go to rural areas than coastal areas of Britain, when in the UK.

Source: International Passenger Survey by ONS, *Saudi Arabia and UAE only .

1.2 Getting around Britain: visits to coast, countryside and villages

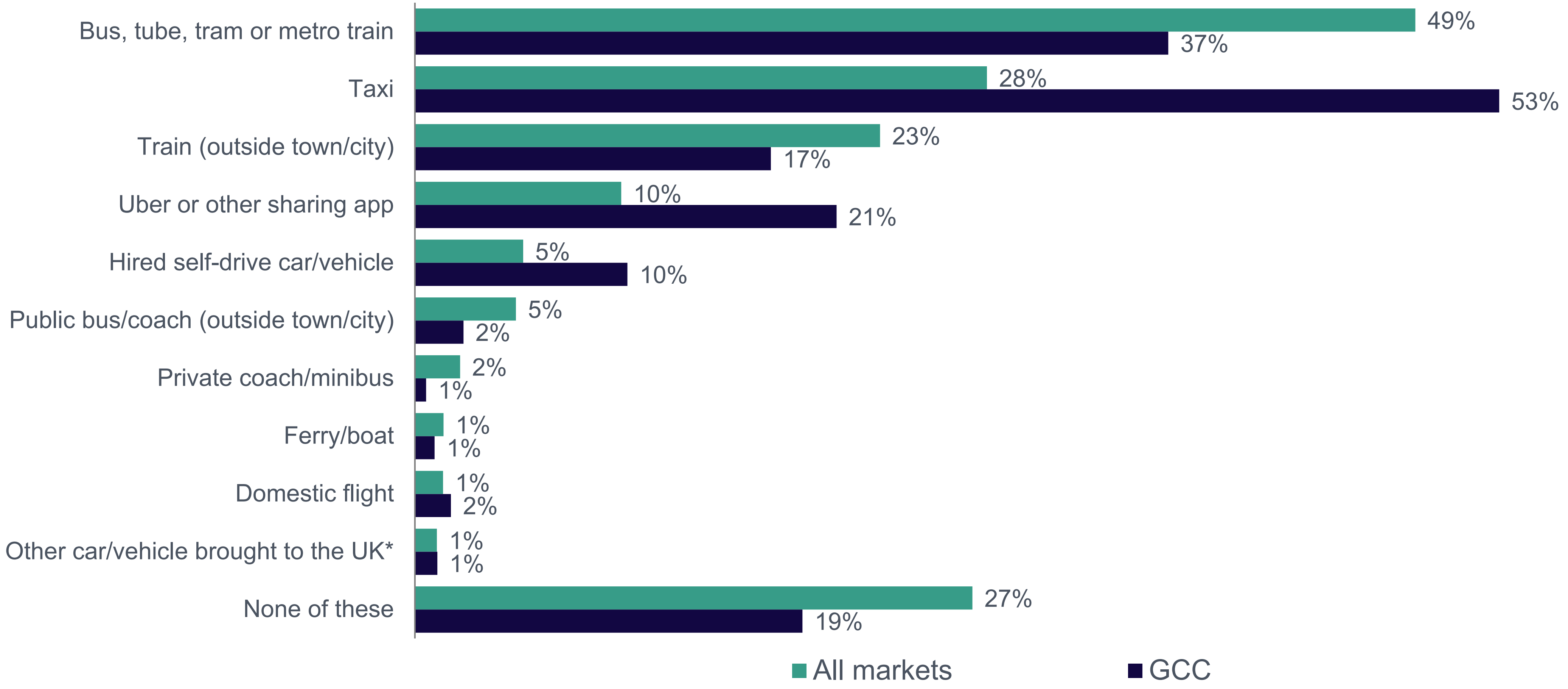
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport



Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for “car/vehicle you/group brought to the UK”

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)

Transport type	When purchased	Saudi Arabia	UAE	GCC	All markets
Transport within London	Pre	51%	40%	**45%**	26%
	During	39%	45%	**41%**	52%
Train travel	Pre	50%	34%	**44%**	27%
	During	30%	47%	**36%**	31%
Airport transfer	Pre	53%	50%	**52%**	36%
	During	33%	29%	**31%**	29%
Coach travel	Pre	49%	42%	**46%**	24%
	During	31%	36%	**33%**	25%
Car hire	Pre	50%	48%	**49%**	27%
	During	29%	42%	**33%**	15%
Flights within the UK	Pre	51%	58%	**54%**	28%
	During	20%	23%	**21%**	9%

- Gulf travellers are much more likely to hire a taxi to travel around while staying in the UK compared to all markets. Similarly, they are more likely to take an Uber, or hire a car or vehicle.
- They under-index on taking public transport, from a train to a bus, tube or tram.
- They tend to prefer to purchase transport before their trip, and this tendency is stronger than the all market average. The highest rates of transport purchase during a trip is seen for transport within London.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

VisitBritain VisitEngland

1.3 Visitor demographics

Visitor characteristics

- There are more men than women visiting the UK from the GCC for all types of visits apart from ‘Misc.’ Beyond this journey purpose, the highest proportion of women travelling to the UK come to visit friends and relatives.
- Visitors from the Gulf markets are younger than the average: there are only a handful of visitors over 65 years old (3% of all visits in 2019), and 32% are under 35.
- In 2019 almost 1-in-2 visits from the GCC were made by a UAE resident (46% of all GCC visits). Saudi Arabia accounted for 18%, Kuwait 15%, and Qatar 14%. Two thirds of visits from the UAE are made by Dubai residents, and a similar share of Saudi Arabian visits are made by residents of Riyadh city and Jeddah.
- Among GCC residents visiting the UK, the proportion who are UK expats is very high in the UAE (over a third in 2017-2019) but also in Qatar and Bahrain. The proportion of nationals vs. expats by market has an impact on trip characteristics.
- 97% of staying visitors from the GCC are ‘very’ or ‘extremely’ likely to recommend visiting Britain.

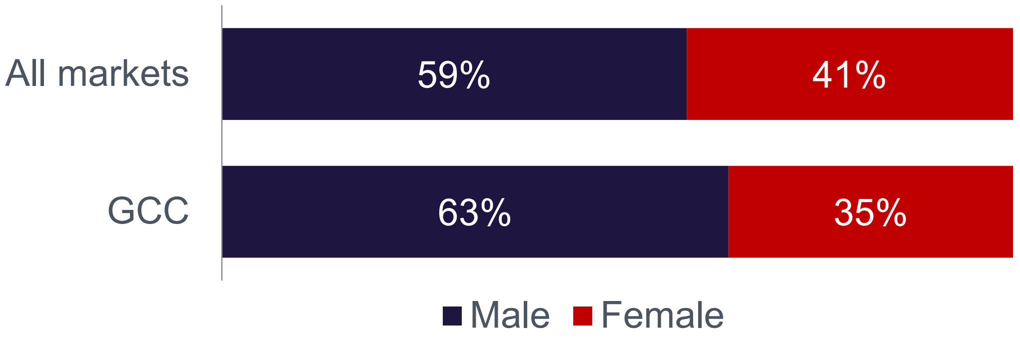
23%

of GCC visits were made by UK expats in 2017-2019

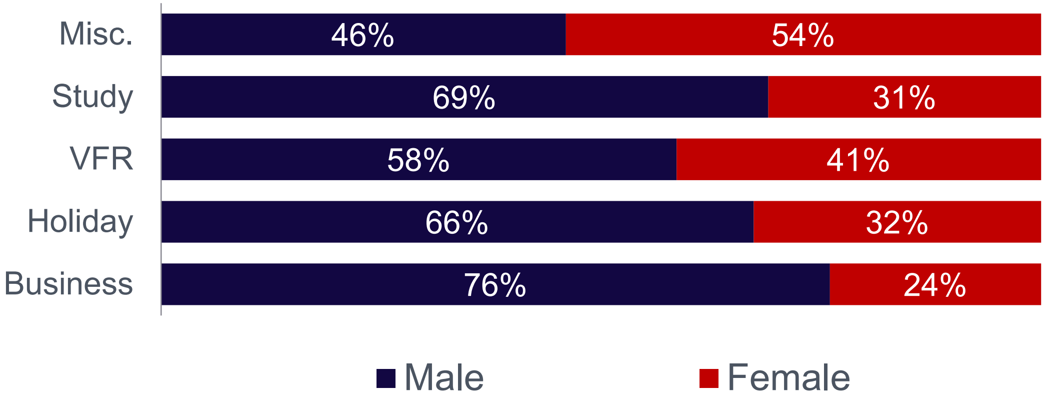
Source: International Passenger Survey by ONS

1.3 Visitor demographics: gender and age groups

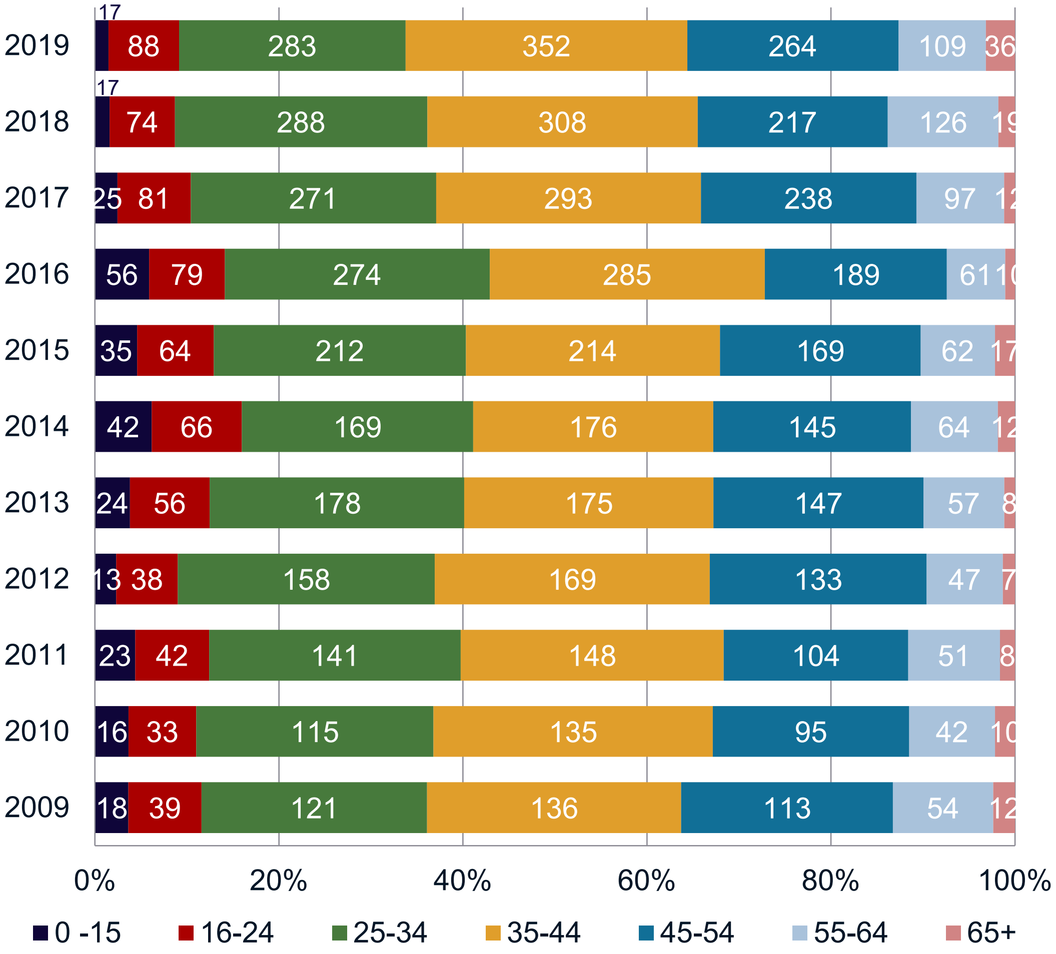
Gender ratio of visits (2019):



Gender ratio of visits from the GCC by journey purpose (2019):



Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: nationalities

Visits from GCC residents by nationality* (2017-2019)

Share of visits for…	Nationals	Other GCC	Other Middle East	UK nationals	Other nationalities
Bahrain	61%	4%	2%	23%	10%
Kuwait	91%	<1%	2%	3%	4%
Oman	66%	2%	1%	16%	15%
Qatar	63%	1%	2%	25%	9%
Saudi Arabia	82%	<1%	2%	9%	7%
UAE	35%	1%	4%	36%	24%
GCC	58%	1%	3%	23%	15%

Average spend per visit per nationality group (2017-2019)

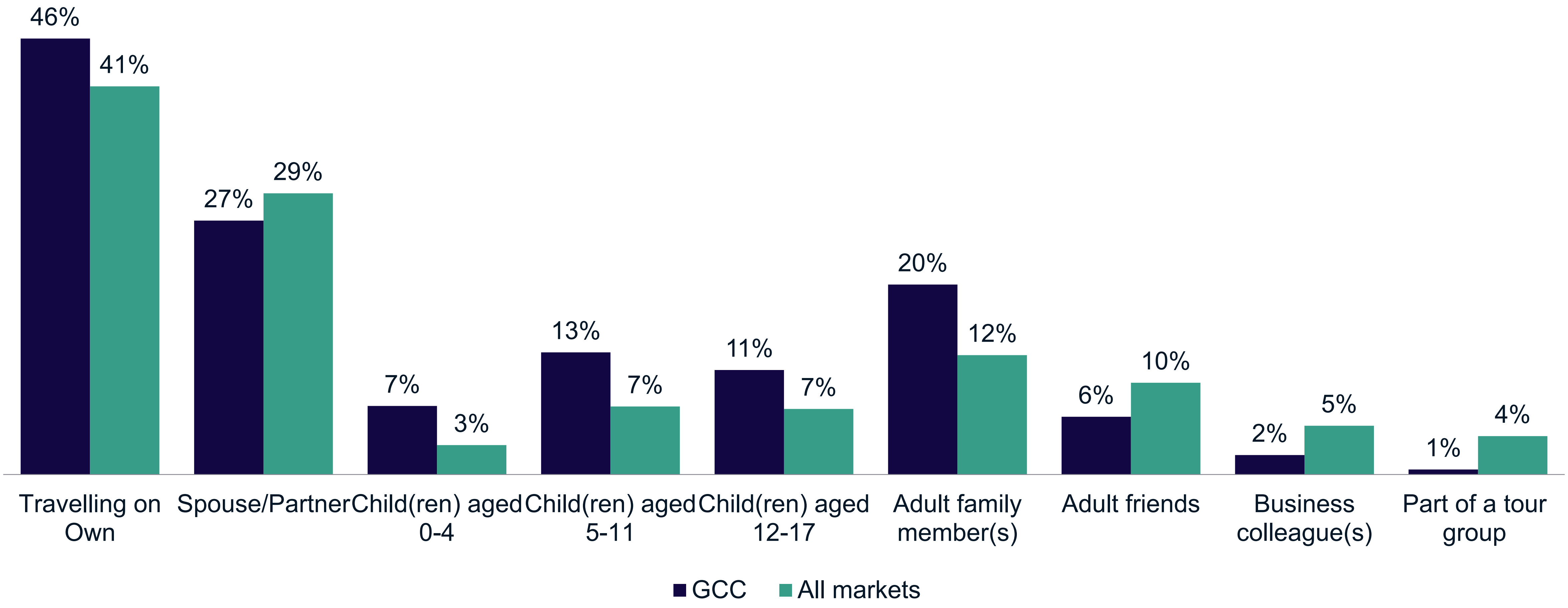
GCC nationals	Other nationalities (inc. UK)
£2,822	£1,802
£2,793	£1,661
£1,805	£1,467
£3,566	£1,462
£4,010	£1,299
£2,696	£1,191
£3,150	£1,273

- Data on inbound visits to the UK by market usually refers to the *country of residence* of the visitor. Here we look at the *nationality* of GCC visitors.
- The UAE is the only GCC country from which there were more UK expats visiting the UK than GCC nationals in 2017-2019. For the remaining markets across the region, nationals make up the majority of visitors.
- Across all the GCC, GCC nationals are the group that spent the most on average per visit. 23% of visits from the GCC were made by a UK expat in 2017-2019.

Source: International Passenger Survey by ONS; *other Middle East‘ nationalities include Iran, Iraq, Israel, Jordan, Lebanon, Syria, and Yemen, Other Middle East, and Egypt

1.3 Visitor demographics: travel companions

Who have GCC visitors to the UK travelled with?

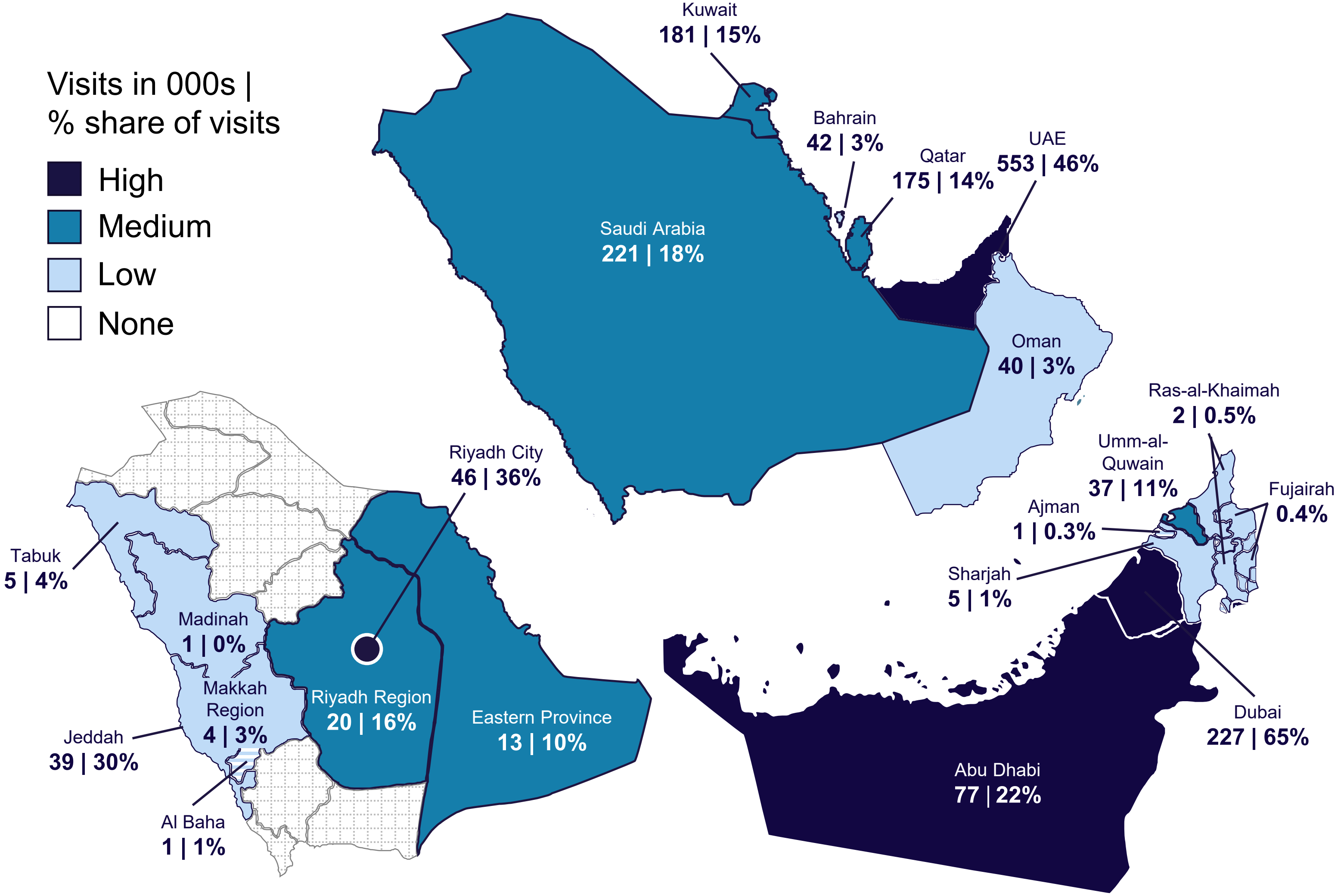


Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

1.3 Visitor demographics: Origin

Visits to the UK

- In 2019, about 1-in-2 visits from the GCC to the UK was made by an UAE resident, and 1-in-5 by a Saudi resident.
- Within Saudi Arabia, most visitors came from Riyadh City and Jeddah. Most UAE visits usually come from Dubai, followed by Abu Dhabi (65% and 22% respectively).
- 87% of the UAE population is urbanised, whereas this figure is 84% in Saudi Arabia.



Source: International Passenger Survey by ONS 2015, CIA World Factbook 2020. Total region data from 2019, UAE from 2017, Saudi Arabia from 2016

1.4 The UK and its competitors (1)

Market size, share and growth potential

- Much of outbound travel from the region is intra-GCC. However, Britain is the most visited destination in Western Europe for the Gulf region overall. For Qatar, it is the most visited destination globally.
- Turkey is Britain's main competitor in Europe: it has more cultural similarities with the GCC markets that can reassure visitors from this region.
- Before 2020, the GCC outbound market was growing; global overnight visits from this market grew by 32% from 2009 to 2019.
- However, due to the COVID-19 pandemic, global overnight visits from the GCC shrank by 66%, and visits to the UK declined by 70%. Visits to the UK are forecast to recover to 2019 levels by 2024.
- Among our competitor set of destinations, Turkey saw the largest increase in market share between 2009 and 2019, with a growth of 18 percentage points, with France losing a significant 24 percentage points in the same period. However, looking further ahead to 2029, competitor share is forecast to stay relatively stable, with the UK and Switzerland gaining 1 percentage point each from Spain and Italy.

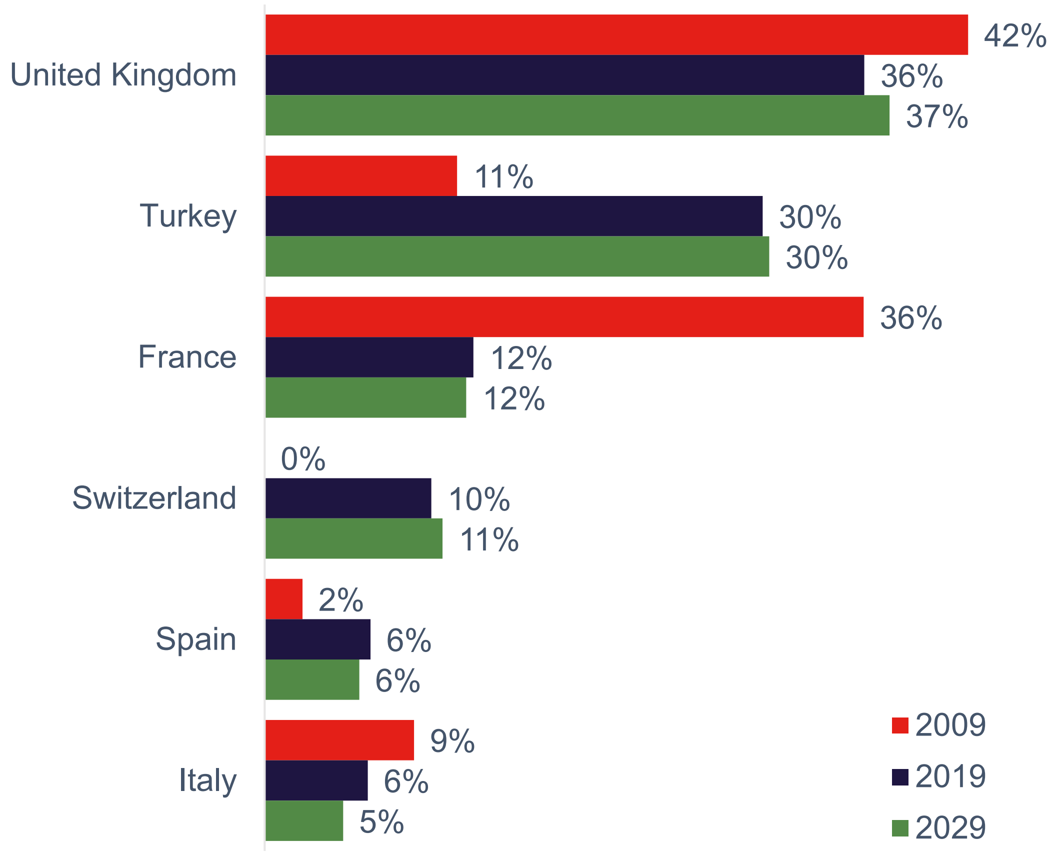
Britain ranks 1st

among GCC outbound destinations by volume in Western Europe, apart from Bahrain

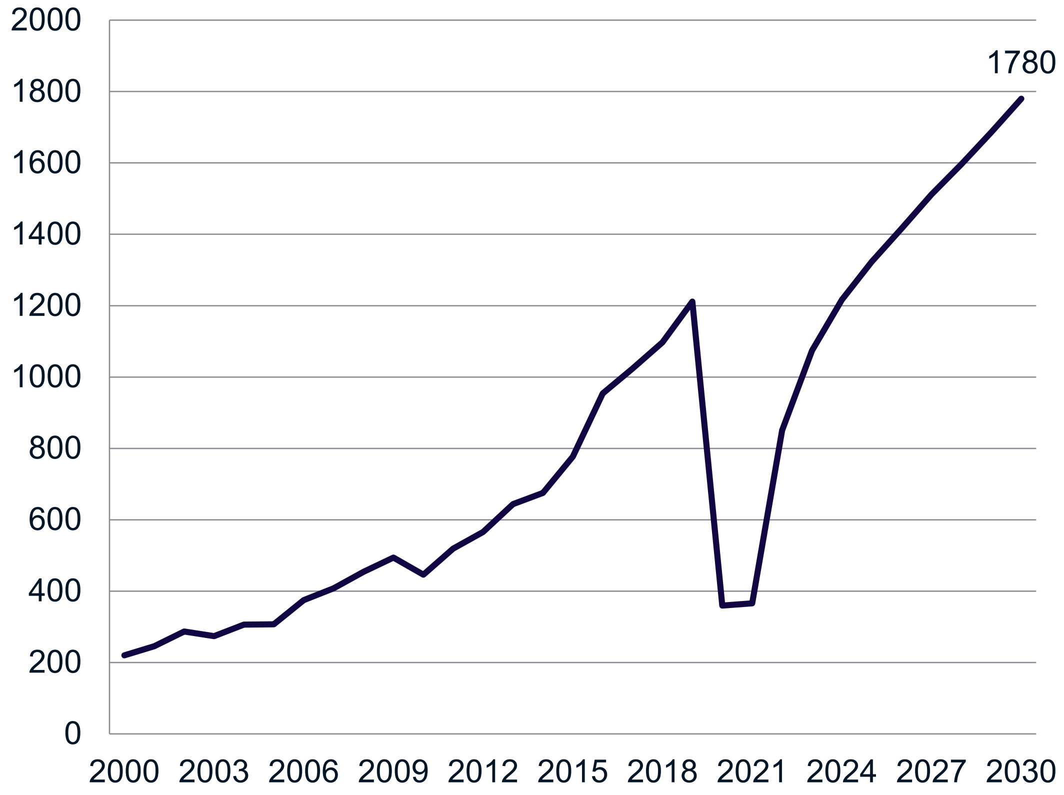
Source: Oxford Economics

1.4 The UK and its competitors (2)

The UK's market share of Gulf visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations

Experiences and perceptions

Chapter 2

2.1 Inbound activities: summary

- Among Gulf visitors, dining in restaurants is the most popular activity, followed by going shopping and sightseeing famous monuments and buildings. Visiting parks or gardens, and museums or art galleries also often feature in visits from the GCC to the UK.
- GCC travellers are much more likely than the all market average to visit a spa or beauty centre, and are also more likely to go shopping, dine in restaurants and visit parks, gardens and national parks.
- When shopping, they are are most likely to buy personal items (clothes, perfumes, jewellery, and other accessories). Among sports, football is by far the most popular to watch when visiting the UK.
- However, GCC visitors are less likely than those from other markets to visit museums, galleries, or other built heritage sites when they are in Britain.

Top 10 activities for Gulf visitors during their visit to the UK

1. Dining in restaurants
2. Going shopping
3. Sightseeing famous monuments/buildings
4. Visiting parks or gardens
5. Visiting museums or art galleries
6. Socialising with the locals
7. Visiting castles or historic houses

9. Going for a walk, hike or ramble

10. Walking in the countryside

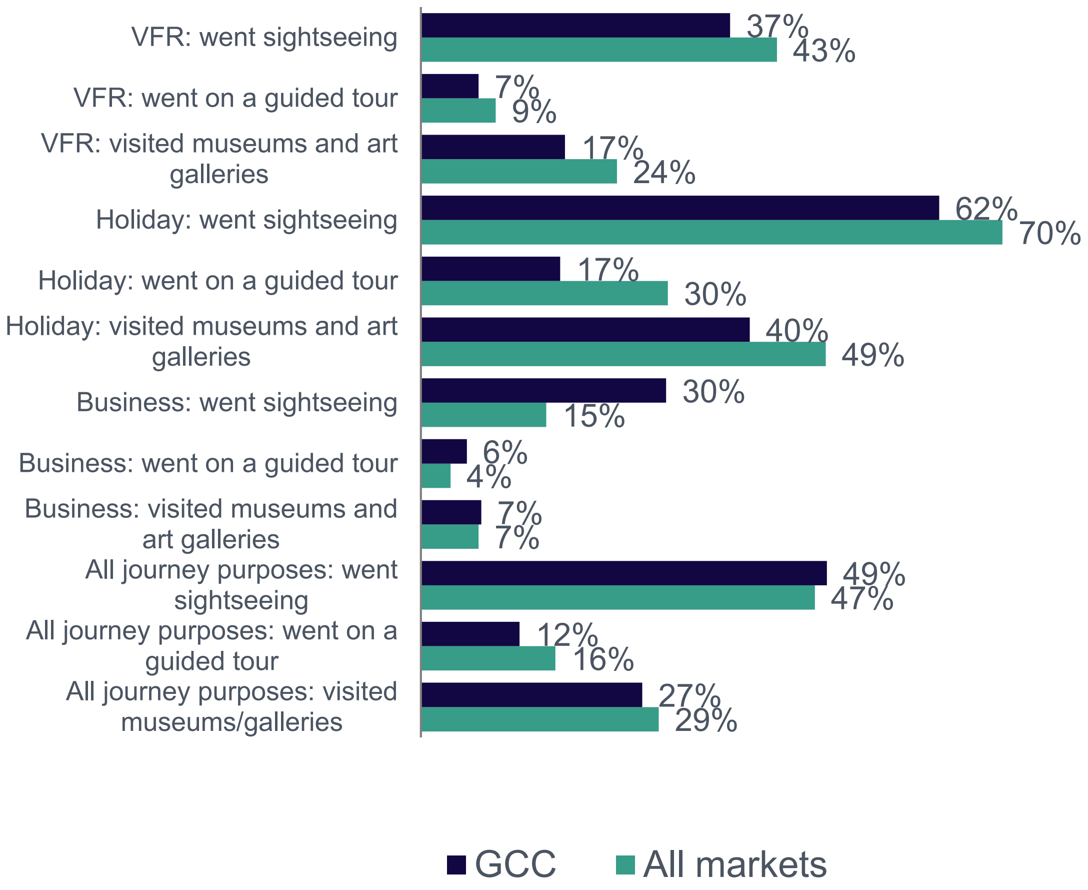
For more information on activities, please visit our webpage of activities undertaken in Britain

Source: International Passenger Survey by ONS, rankings based on 2006-2019 data. *Note: The eighth most popular activity among GCC visitors is 'going to the pub'; however, as this is due to a high proportion of expats responding to the question, this activity is not shown

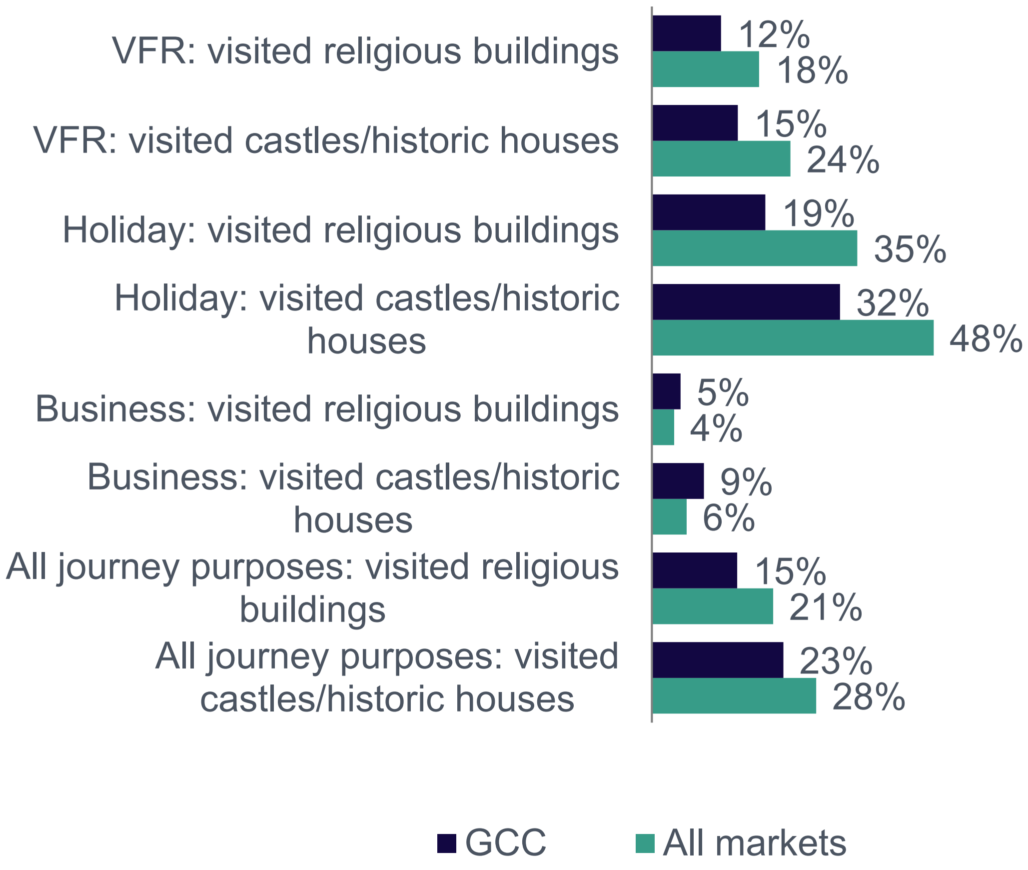
VisitBritain VisitEngland

2.1 Inbound activities: tourism and heritage

Propensity to visit museums and galleries



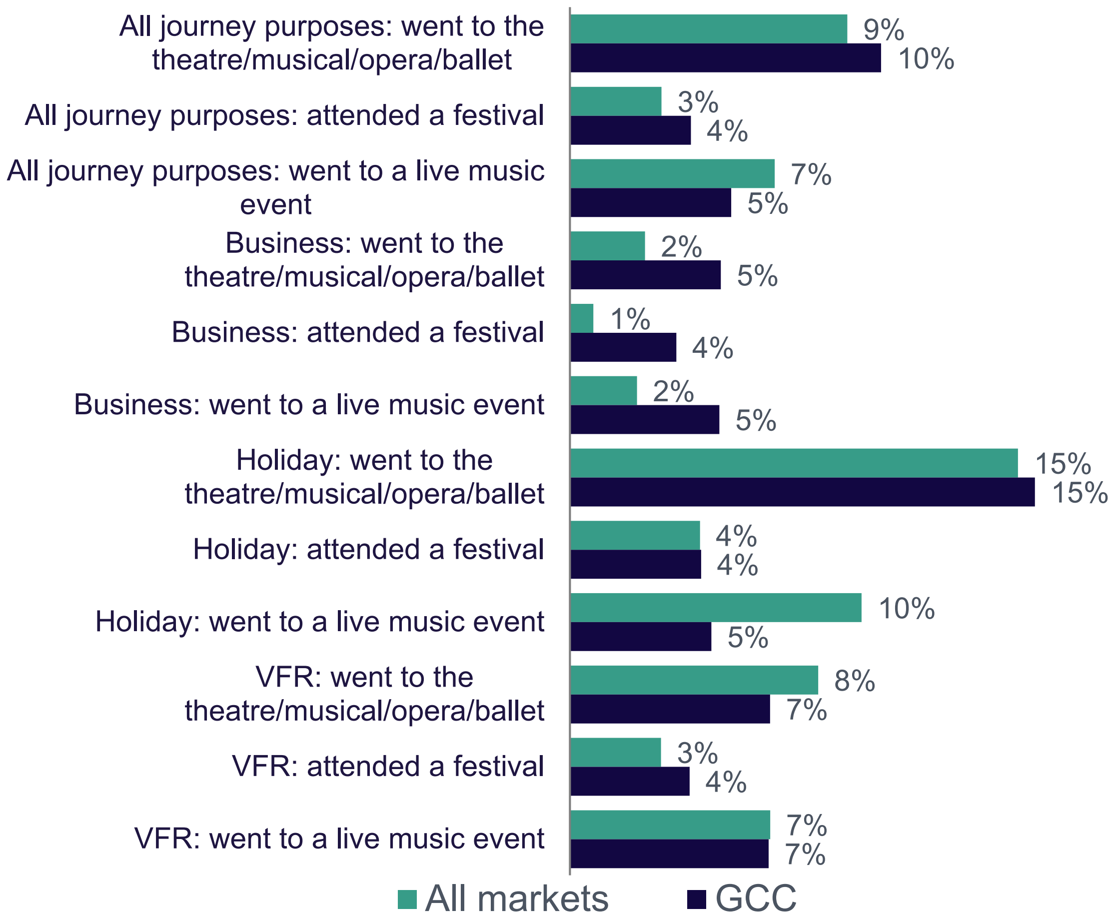
Propensity to visit built heritage sites



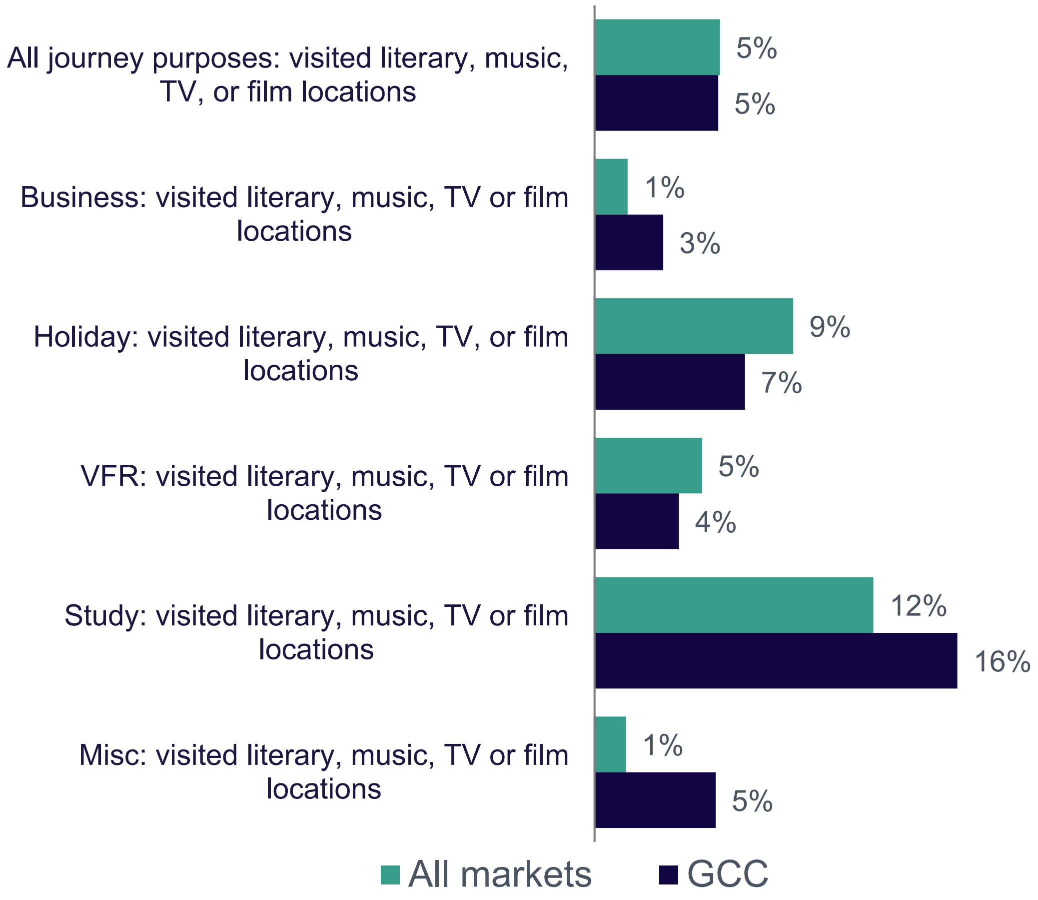
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



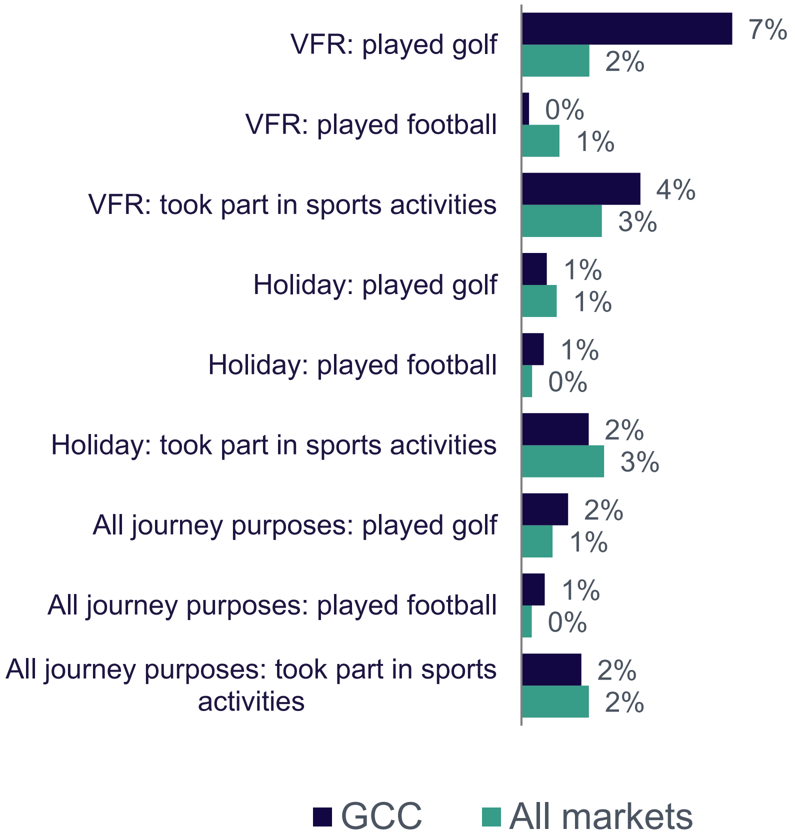
Propensity to participate into other culture-related activities



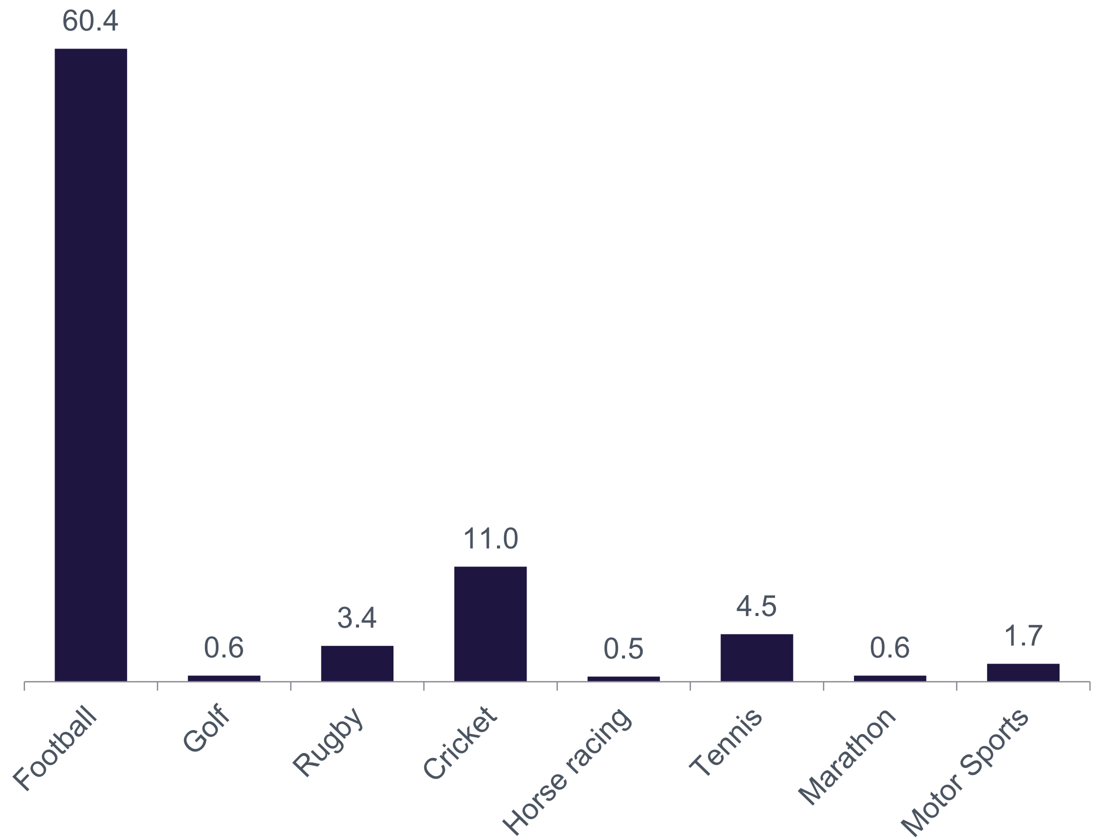
Source: International Passenger Survey by ONS, 2016 (performing arts) and 2013 (watch sport live)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



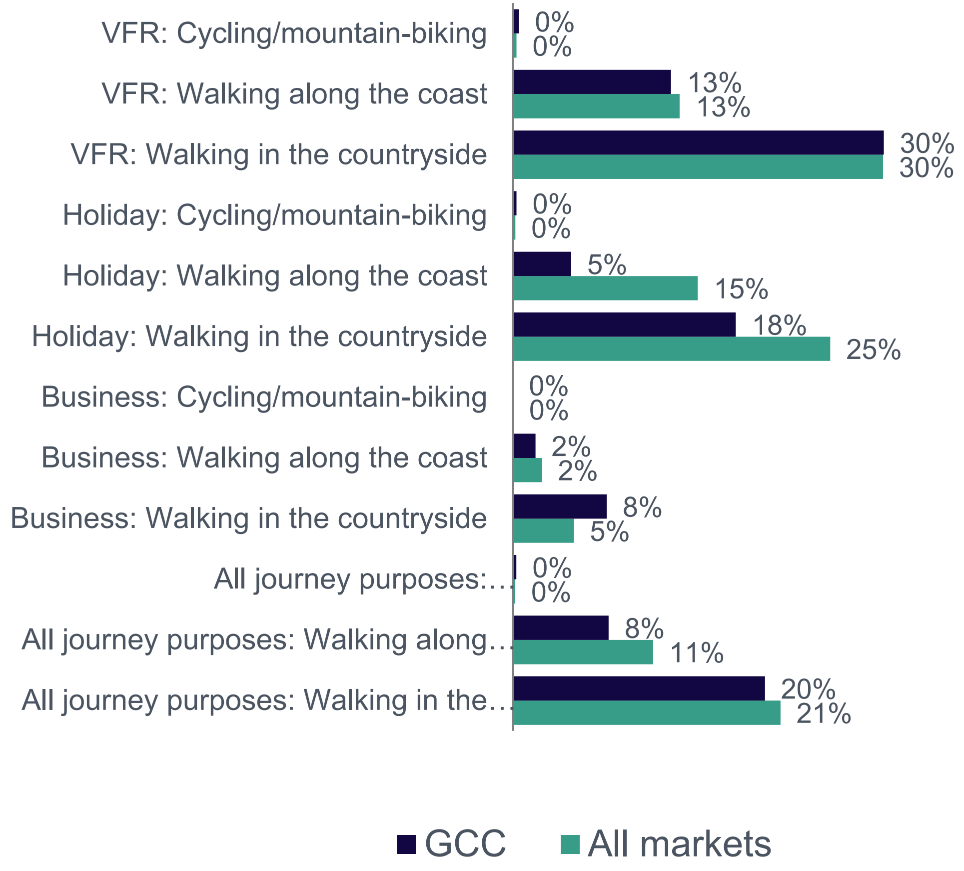
Number who watched sports live during trip (000s)



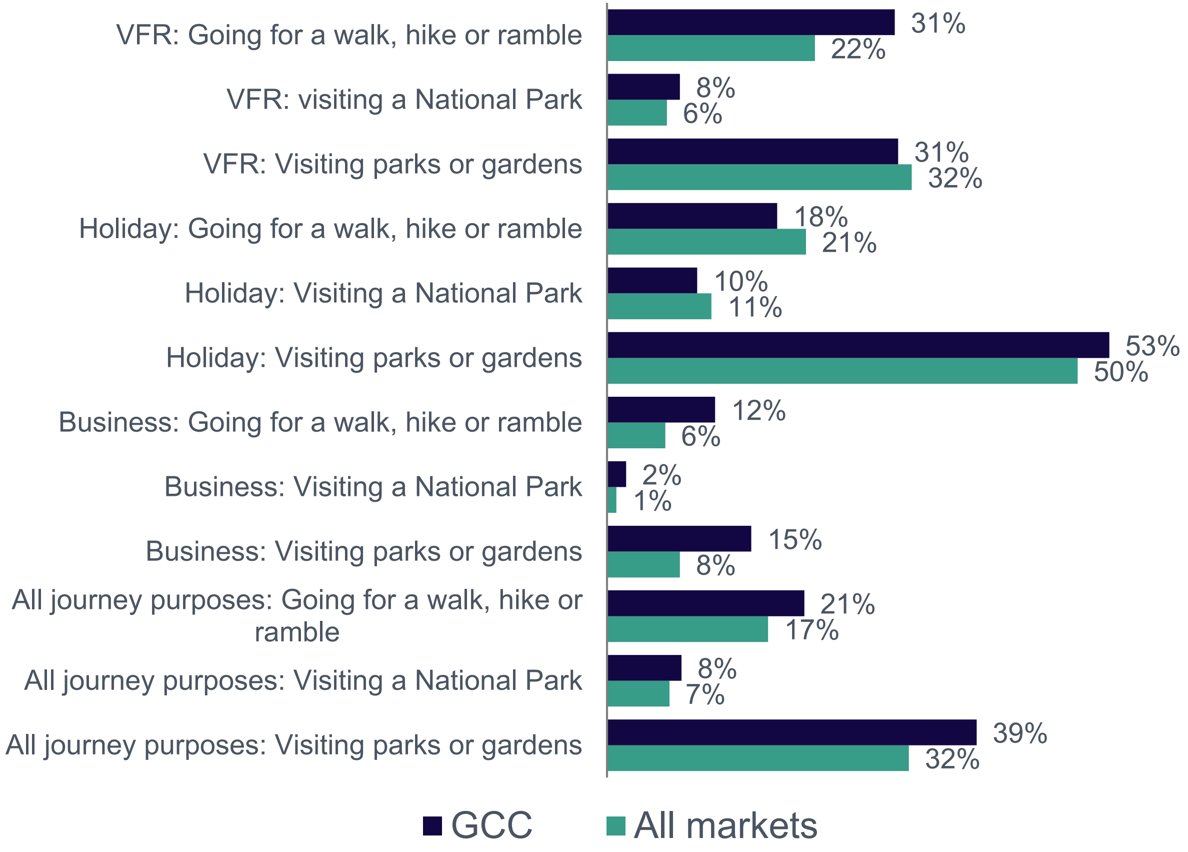
Source: International Passenger Survey by ONS, 2016 (performing arts) and 2019 (watch sport live)

2.1 Inbound activities: outdoors

Propensity to go for a walk or cycle



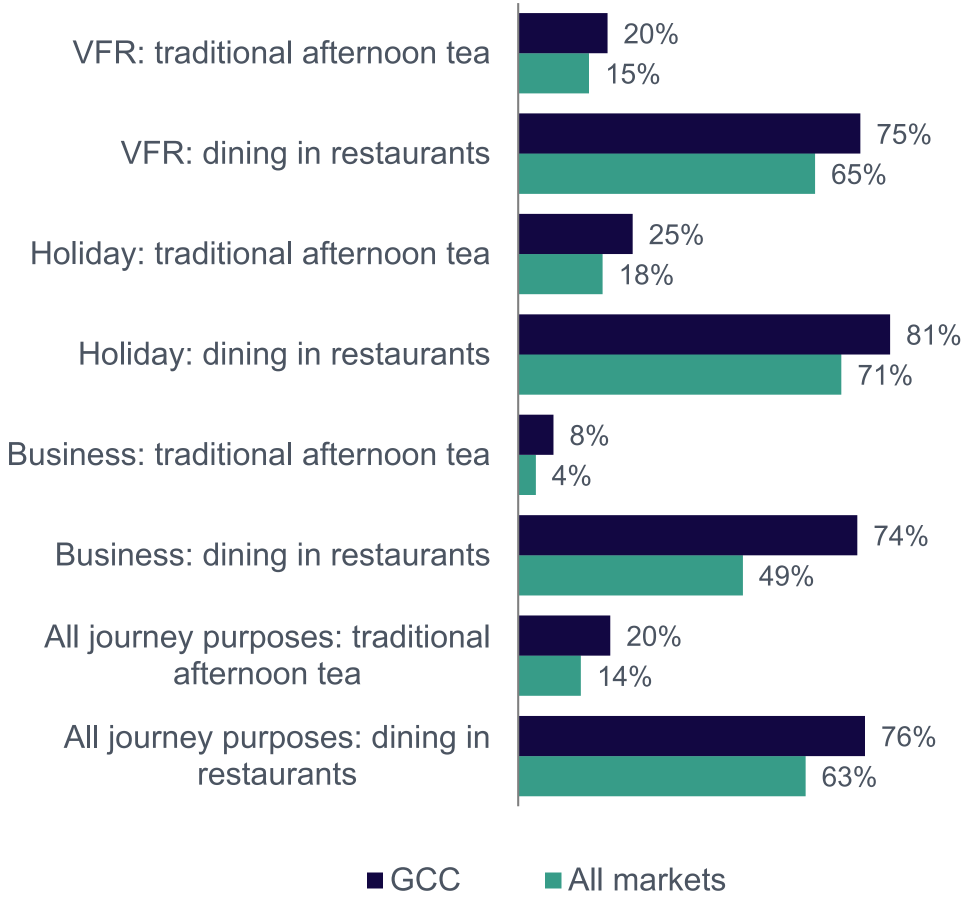
Propensity to enjoy the outdoors



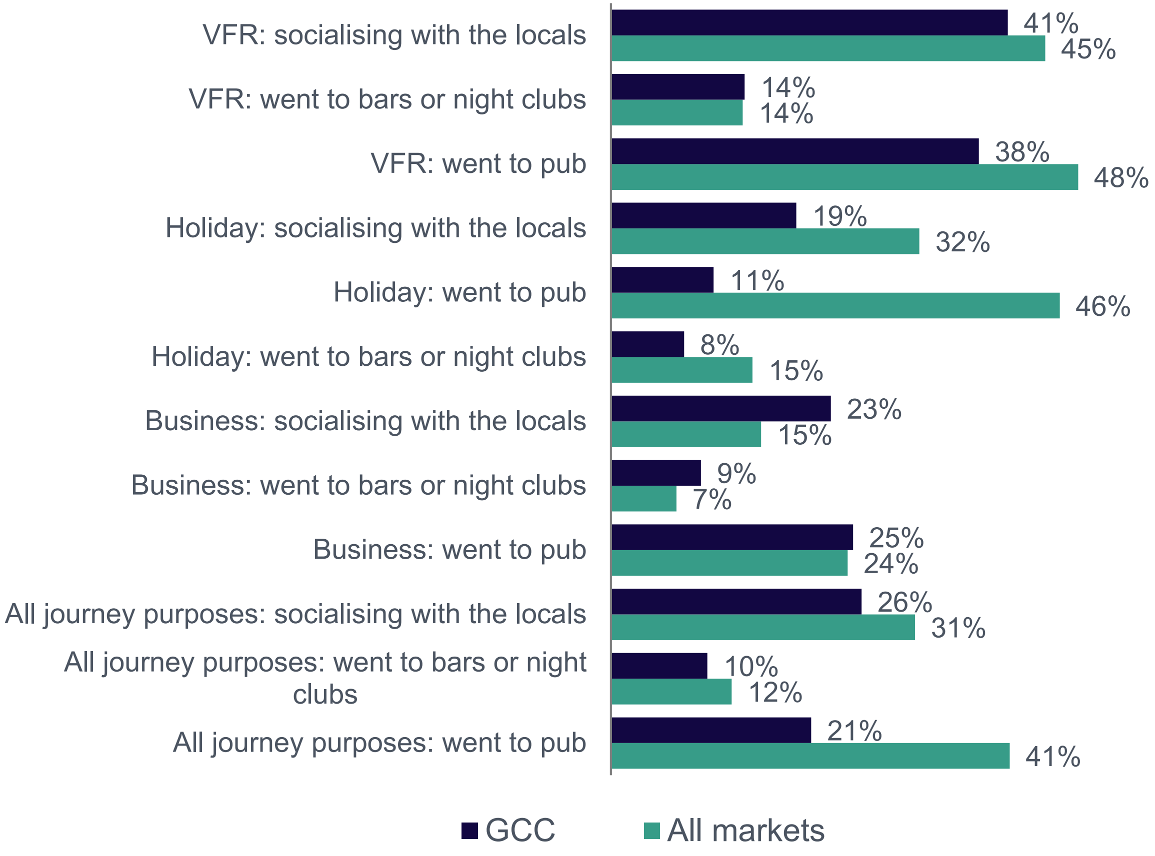
Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



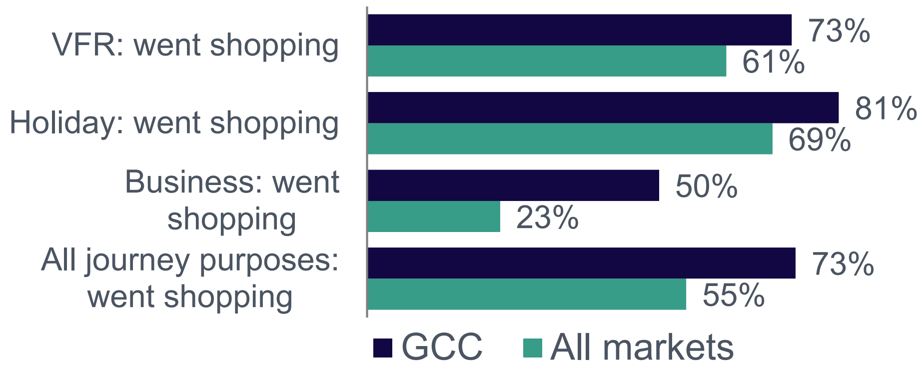
Propensity to go to the pub or bars and night clubs, or to socialise with locals



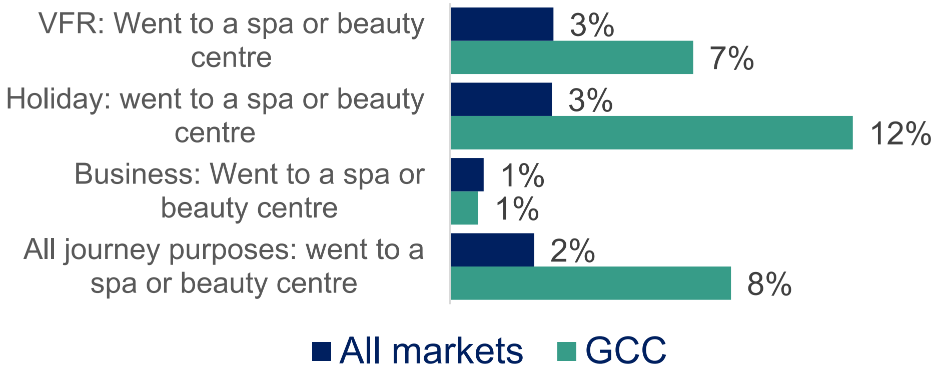
Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)

2.1 Inbound activities: shopping

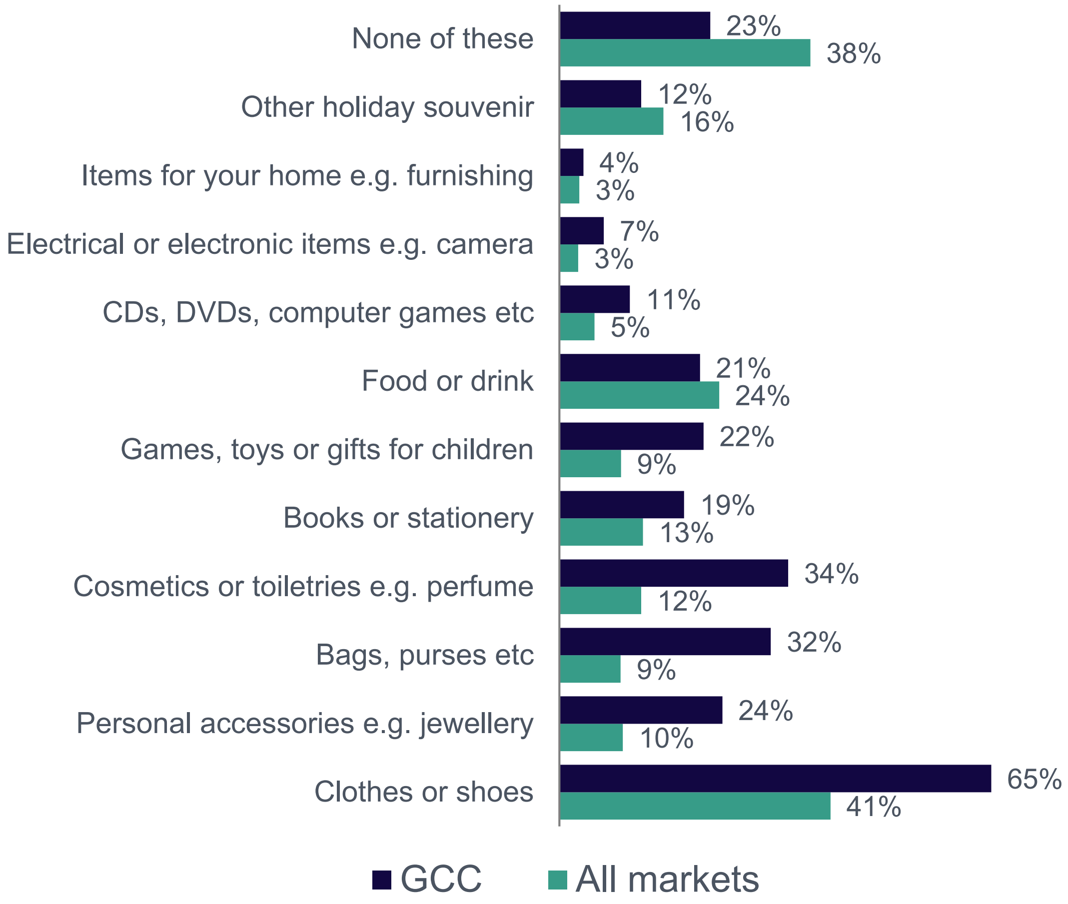
Propensity to go to shopping



Propensity to go to a spa or beauty centre



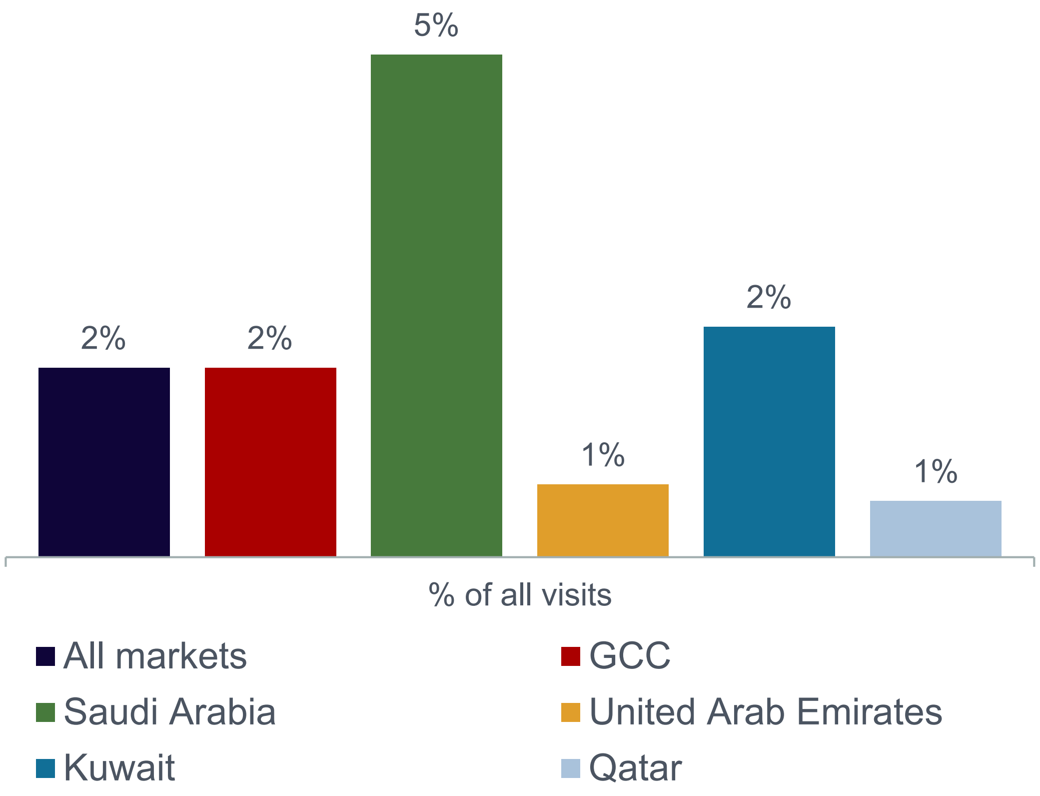
Propensity to purchase selected items



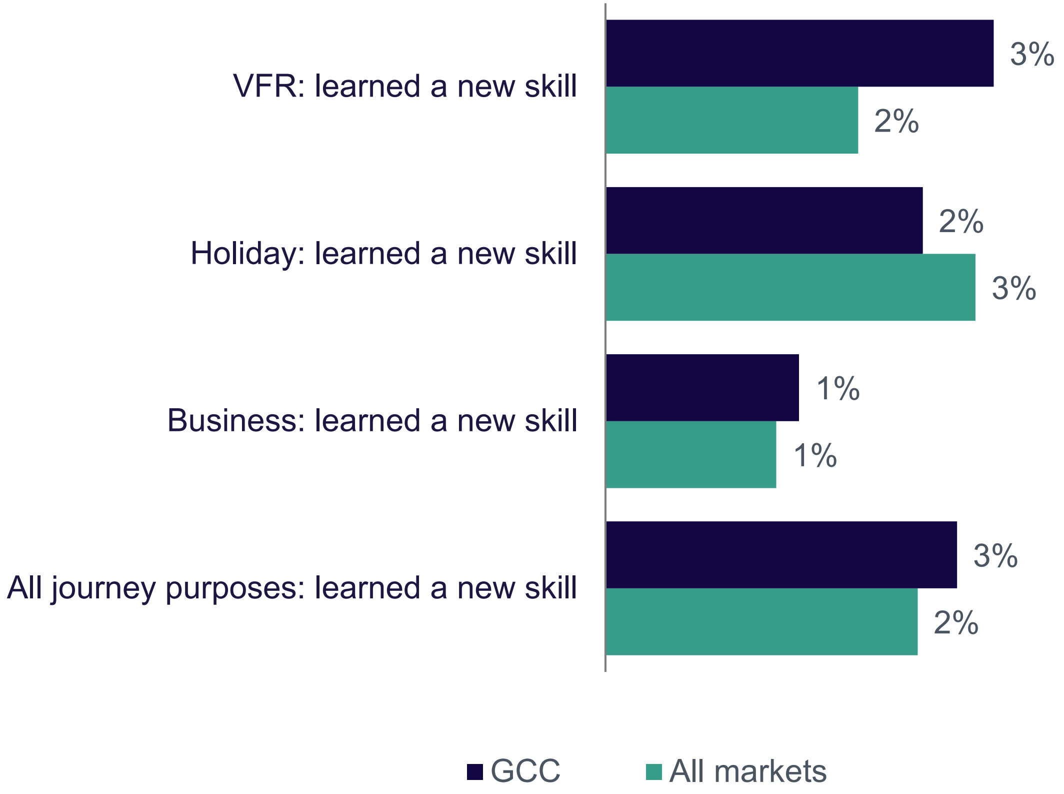
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK



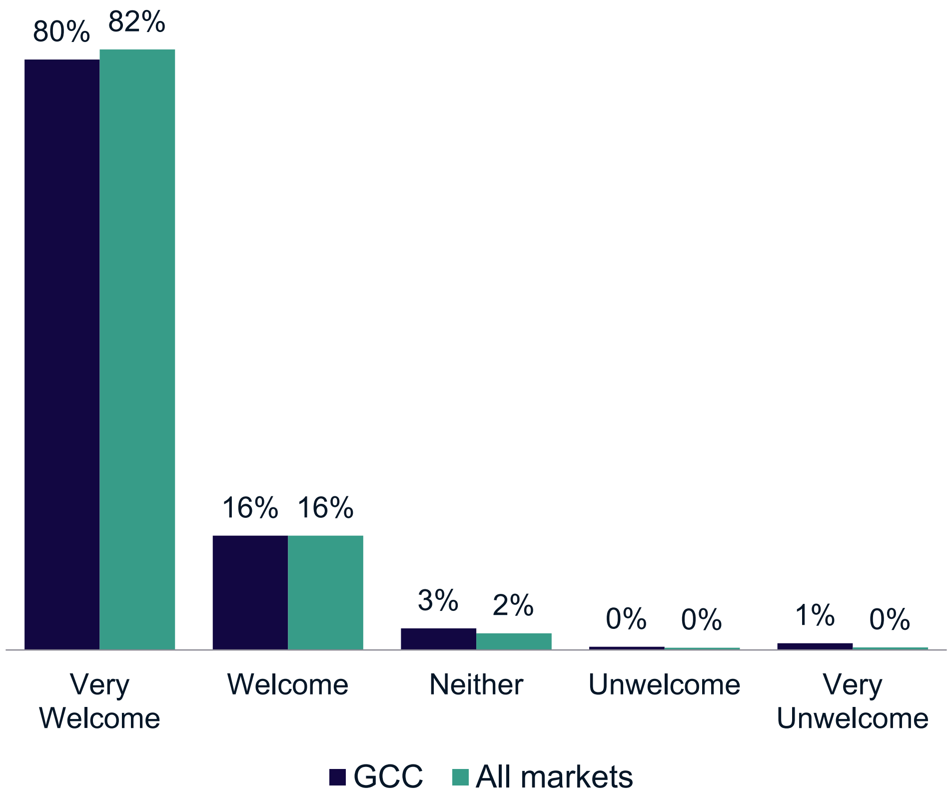
Propensity to learn a new skill or craft



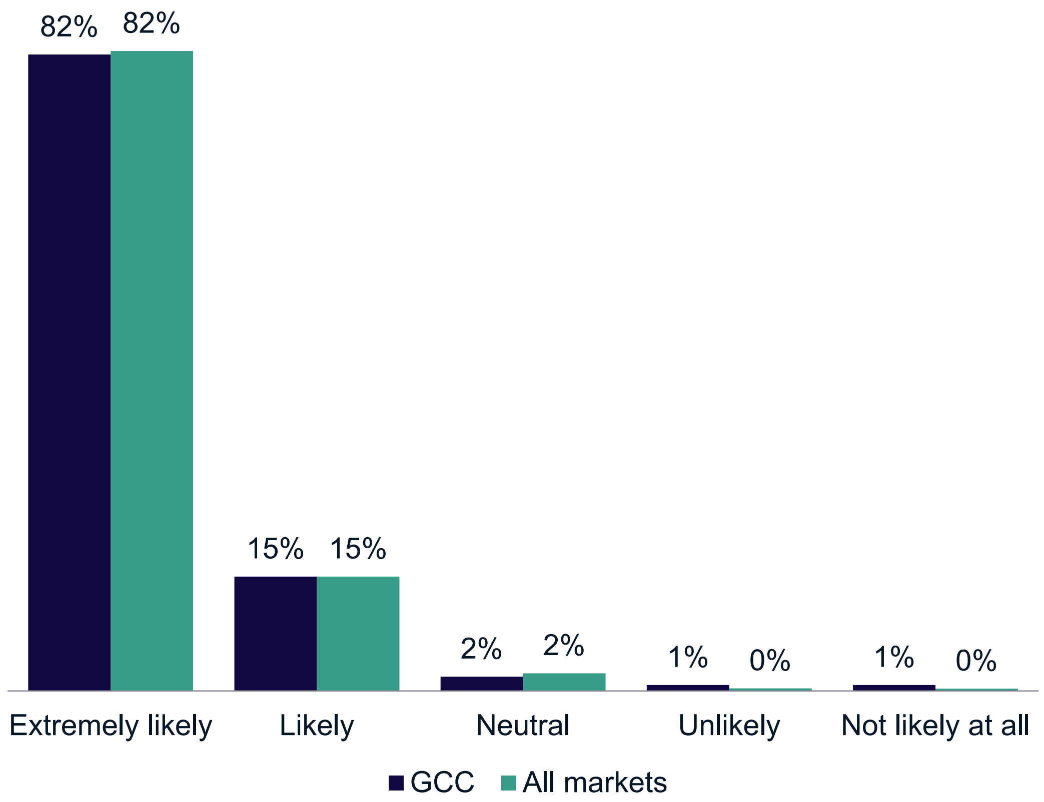
Source: International Passenger Survey by ONS, Did you go on any English language courses during this visit? Displayed as % of all visits in this market; visits incl. participation in an English language course might be based on a small sample.

2.2 Welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017

2.3 Perceptions of the UK (1)

- Gulf residents have positive perceptions of Britain. Their top associations with the UK reveal an appreciation for our awe inspiring landscapes, educational historical sites, vibrant and buzzing cities and the potential for luxury experiences.
- Saudi Arabia residents feel that Britain is the best place to meet the locals; rating this best among UK competitors. Among Saudis, Britain rates least well for getting some sun, exploration and nostalgic locations.
- UAE residents rate Britain highly for easy public transport and sporting events. Among this group, Britain rate poorly as a place to have fun and laughter.
- Saudi visitors are most likely to be motivated to come to the Britain to seek the climate (cooler than their home country) and UAE visitors are likely to be motivated by a good deal, and a sense of security and safety.

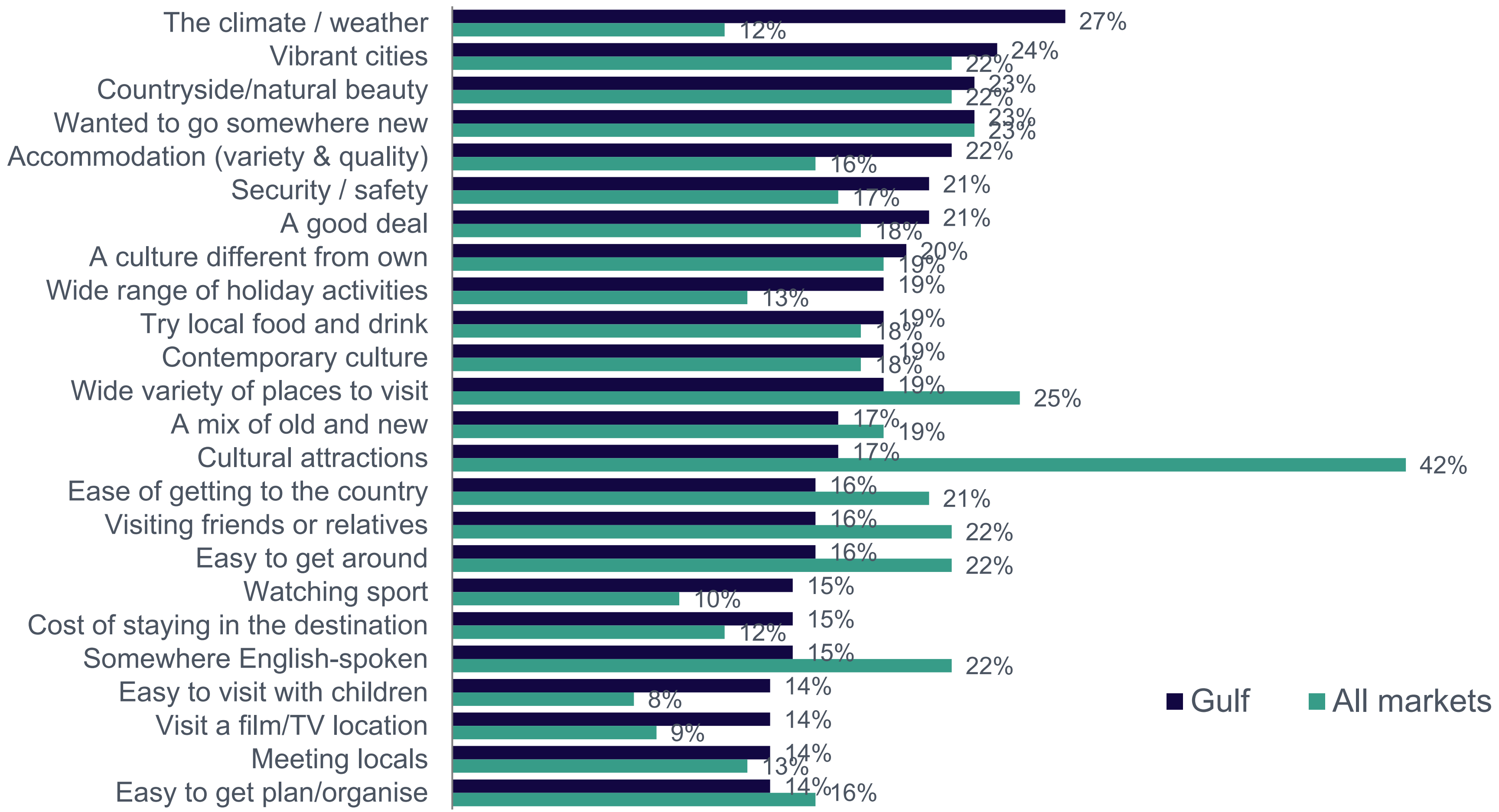
GCC visitors come to the UK for…
GCC visitors come to the UK for…

The climate, vibrant cities, countryside/natural beauty, and to visit somewhere new

Source: Anholt Nation Brands Index, powered by Ipsos 2020, VisitBritain/ Arkenford 2013

2.3 Perceptions of the UK (2)

Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.3 Perceptions of the UK: Saudi Arabia (1)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	GB	FR	IT	AU	US	GE
6.2	Have fun and laughter	29%	46%	37%	29%	24%	15%
6.14	Enjoy the beauty of the landscape	33%	41%	36%	50%	30%	30%
6.01	Enjoy peace & quiet	26%	37%	32%	38%	16%	24%
5.99	Be physically healthier	41%	46%	37%	40%	39%	38%
5.91	See world famous sites and places	51%	60%	54%	27%	43%	34%
5.9	The people are friendly and welcoming	32%	40%	39%	38%	33%	29%
5.87	Soak up the atmosphere	33%	34%	33%	29%	10%	17%
5.86	Explore the place	22%	37%	42%	46%	26%	24%
5.84	Experience things that are new to me	30%	35%	32%	37%	32%	24%
5.84	Feel connected to nature	25%	25%	32%	53%	28%	34%
5.82	Offers good value for money	30%	36%	36%	31%	35%	28%
5.81	Chill/ slow down to a different pace of life	21%	42%	35%	26%	25%	17%
5.81	Have dedicated time with my other half	41%	53%	48%	42%	38%	34%
5.76	Do something the children would really enjoy	38%	46%	37%	41%	48%	33%
5.74	Experience activities/places with a wow factor	34%	48%	44%	33%	42%	28%
5.74	Revisit places of nostalgic importance to me	17%	26%	29%	21%	25%	23%
5.74	A good place to visit at any time of year	34%	44%	41%	37%	40%	30%
5.73	Broaden my mind/ Stimulate my thinking	39%	42%	43%	31%	45%	36%
5.73	It offers unique holiday experiences	39%	51%	49%	44%	42%	33%
5.71	Provides a wide range of holiday experiences	40%	48%	46%	42%	48%	32%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK: Saudi Arabia (2)

Holiday wants and % saying destination is best place for… bottom 20

Importance	Perception	GB	FR	IT	AU	US	GE
5.69	Easy to get around by public transport	49%	46%	41%	34%	45%	39%
5.64	Enjoy high quality food (gourmet food)	31%	54%	63%	26%	34%	23%
5.61	Enjoy local specialities (food)	34%	56%	63%	26%	40%	26%
5.47	Experience adrenalin filled adventures	24%	40%	27%	36%	34%	28%
5.44	Visit a place with a lot of history/historic sites	40%	48%	49%	20%	19%	31%
5.35	Do what I want when I want spontaneously	28%	16%	28%	17%	46%	13%
5.35	Feel special or spoilt	27%	42%	38%	24%	33%	18%
5.35	Good shopping	32%	40%	44%	22%	44%	26%
5.33	Get off the beaten track	35%	45%	42%	34%	35%	39%
5.25	Fashionable destination	41%	59%	49%	35%	48%	36%
5.23	Do something environmentally sustainable/ green	48%	46%	47%	48%	51%	42%
5.19	Visit places important to my family's history	32%	34%	37%	26%	29%	20%
5.02	Party	38%	46%	31%	28%	42%	19%
4.99	To participate in an active pastime or sport	44%	35%	33%	35%	35%	25%
4.97	Go somewhere that provided lots of laid on entertainment/nightlife	43%	60%	52%	36%	58%	37%
4.84	Meet the locals	66%	29%	25%	29%	29%	6%
4.82	Do something useful like volunteering to help on a project	19%	26%	29%	29%	21%	16%
4.8	Meet and have fun with other tourists	48%	60%	50%	16%	49%	29%
4.79	Get some sun	18%	35%	33%	36%	31%	22%
4.46	Watch a sporting event	53%	31%	59%	24%	26%	36%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK: UAE (1)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	GB	FR	IT	AU	US	GE
6.13	Enjoy the beauty of the landscape	41%	51%	56%	53%	39%	33%
6.09	Have fun and laughter	15%	33%	39%	35%	37%	15%
6.09	Offers good value for money	29%	32%	32%	34%	37%	26%
6.05	See world famous sites and places	47%	57%	58%	33%	45%	32%
5.99	Enjoy peace & quiet	32%	39%	42%	42%	24%	26%
5.96	Do something the children would really enjoy	37%	44%	35%	47%	54%	25%
5.94	Be physically healthier	38%	40%	35%	40%	37%	33%
5.94	The people are friendly and welcoming	33%	34%	38%	39%	39%	26%
5.94	It offers unique holiday experiences	40%	50%	49%	47%	46%	36%
5.93	Feel connected to nature	36%	41%	35%	56%	27%	27%
5.92	Explore the place	37%	33%	44%	41%	42%	17%
5.9	Experience things that are new to me	45%	46%	45%	40%	53%	39%
5.87	Provides a wide range of holiday experiences	41%	47%	45%	46%	54%	30%
5.81	Have dedicated time with my other half	38%	55%	54%	46%	38%	30%
5.8	Broaden my mind/ Stimulate my thinking	32%	42%	43%	35%	41%	30%
5.8	A good place to visit at any time of year	32%	38%	39%	39%	41%	27%
5.73	Easy to get around by public transport	51%	42%	35%	38%	51%	36%
5.71	Experience activities/places with a wow factor	34%	51%	50%	43%	52%	29%
5.68	Enjoy local specialities (food)	24%	54%	62%	30%	34%	22%
5.67	Enjoy high quality food (gourmet food)	33%	49%	55%	32%	41%	15%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK: UAE (2)

Holiday wants and % saying destination is best place for… bottom 20

Importance	Perception	GB	FR	IT	AU	US	GE
5.53	Visit a place with a lot of history/historic sites	54%	50%	58%	23%	32%	37%
5.48	Chill/ slow down to a different pace of life	27%	34%	38%	26%	28%	18%
5.48	Revisit places of nostalgic importance to me	24%	24%	22%	27%	20%	21%
5.39	Do what I want when I want spontaneously	30%	35%	36%	34%	44%	21%
5.39	Do something environmentally sustainable/ green	20%	23%	16%	42%	31%	24%
5.31	Soak up the atmosphere	30%	43%	47%	40%	49%	39%
5.31	Good shopping	38%	42%	35%	28%	52%	31%
5.23	Feel special or spoilt	27%	36%	31%	38%	31%	33%
5.23	Visit places important to my family's history	31%	32%	34%	29%	33%	20%
5.2	Experience adrenalin filled adventures	33%	41%	38%	36%	44%	28%
5.1	Go somewhere that provided lots of laid on entertainment/nightlife	46%	53%	38%	39%	58%	31%
4.93	Party	46%	37%	36%	42%	54%	34%
4.89	Get off the beaten track	34%	39%	26%	27%	33%	26%
4.88	To participate in an active pastime or sport	25%	29%	42%	39%	39%	33%
4.88	Fashionable destination	43%	63%	54%	31%	53%	28%
4.87	Get some sun	28%	43%	40%	49%	38%	25%
4.85	Meet and have fun with other tourists	41%	50%	31%	29%	45%	34%
4.79	Meet the locals	28%	0%	36%	28%	55%	21%
4.75	Do something useful like volunteering to help on a project	32%	38%	33%	21%	26%	25%
4.54	Watch a sporting event	50%	35%	27%	26%	37%	28%

Source: VisitBritain/Arkenford 2013

Understanding the market

Chapter 3

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3.1 Structural drivers

- All GCC countries are monarchies. Most took their present day form in the 20th century. Saudi Arabia unified its kingdom in 1932, with an absolute monarchy ruling 13 regions. The UAE became a federation of monarchies in the 1970's, with 6 original states, and a further 7th joining afterwards. Both Kuwait and Bahrain used to be British protectorates until 1961 and 1971 respectively, when constitutional monarchies assumed power. Oman and Qatar were organised as absolute monarchies earlier: Oman's 11 governorates reached their independence from Portuguese rule in 1650, and Qatar's Al Thani family has ruled over its 8 municipalities since the mid-1800s.
- Many differences still exist in the area. For example, while most of their GDPs are reliant on oil and natural gas, the UAE has long since diversified its economy and others have started to do so too.
- All Gulf markets share the same official language, Arabic, and the same majoritarian religion, Islam, with the two most holy Muslim cities sited on Saudi territory. However, immigrants account for about half of the GCC population on average, which means that English is widely spoken.
- The population in the GCC countries is usually concentrated in and around the main cities: residents of urban areas account for 87% of Omanis, 84% of Saudis, 87% of Emiratis, 90% of Bahrainis, 100% of Kuwaitis, and 99% of Qataris (compared to 84% for UK residents).

International migrants account for **about half** of the GCC population

Source: Oxford Economics, CIA World Factbook

3.1 Structural drivers: general market overview

General Market Conditions

- Considering all 6 GCC countries together, the Gulf market would rank as Britain's 9th largest source market in terms of visits, and 2nd most valuable, as of 2019.
- Despite diversification of the Gulf countries' economies in the last few years, overall the GDP of the Gulf region remains dependent on oil and gas.
- Due to the coronavirus pandemic, heavy GDP losses were observed across the GCC, and GDP has been 8% below the counterfactual GDP level without the pandemic.
- Significant disruptions related to GOVID-19 compounded by a sharp fall in oil prices weighed heavily on Bahrain's economy in 2020.
- Kuwait is also still adapting to the twin shocks of COVID-19 and the slump in oil prices that hard-hit its economy and fiscal and external positions.
- Rapid and well coordinated measures limited the spread of COVID-19 in Oman, but lockdown restrictions weighed heavily on economic activity in 2020.
- Qatar's limited interaction with its immediate neighbours at the start of the pandemic somewhat buffered the impact of COVID-19, and the fundamentals for a strong recovery are in place.
- After a deep contraction in 2020, Saudi Arabia's economy is on a recovery path as the national vaccination program gains momentum.
- COVID-19 and its economic fallout were a major shock to the UAE's open economy, and the lingering impact on global travel will hamper the recovery of its tourism industry. However, the delayed Expo 2020 is due to take place in October 2021, and will provide a significant boost to recovery.

GDP per capita PPP

Market	US$, 2021
Bahrain	44,822
Kuwait	39,141
Oman	29,138
Qatar	85,872
Saudi Arabia	48,318
UAE	68,192

Real GDP growth (%)

Indicator	2019	2020	2021	2022
Bahrain	2.1	-5.0	2.2	3.6
Kuwait	-0.6	-8.9	2.5	3.4
Oman	-0.8	-5.8	2.1	3.5
Qatar	0.8	-3.7	2.5	3.6
Saudi Arabia	0.3	-4.1	2.2	4.7
UAE	3.4	-6.1	1.7	6.5

Source: International Passenger Survey by ONS, Oxford Economics, World Bank

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure (2021 estimates unless noted)	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
Total population (m)	1.5	4.3	4.7	2.8	35.9	9.3
Median age (2020)	32.5	36.8	30.6	32.3	31.8	32.6
Population growth rate vs. 2020	0.90%	1.20%	1.89%	1.23%	1.62%	0.62%
Proportion of international migrants (% of total population, 2020)	55.0	72.8	46.5	77.3	38.6	88.1

- Saudi Arabia is the most populated country within the GCC: 61% of Gulf inhabitants are Saudi.
- Over half of the inhabitants of the UAE, Kuwait and Qatar are expats.
- Gulf residents are relatively young on average: median ages rank between 26.2 in Oman and 38.4 years old in UAE, compared to 40.6 in the UK.
- Overall the Middle East saw a 6.8% growth in the number of HNWIs from 2019 to 2020. Individually, two markets from the GCC rank in the top 25 countries for HNWI population. Saudi Arabia is ranked 17th, and Kuwait is ranked 18th. Saudi Arabia recorded growth in HNWI population in 2019-2020, and gained one rank, however Kuwait lost two ranks in the same period.

Source: Oxford Economics, CIA World Factbook, UN Migration report 2020 Highlights, Capgemini World Wealth Report 2021 *HNWIs: stands for High Net Worth Individuals, people whose liquid assets are worth US$1m or over

3.1 Structural drivers: latest domestic developments in the GCC

Saudi Arabia Vision 2030

- In 2016, King Salman bin Abdulaziz Al Saud released Saudi Vision 2030, a plan to reduce Saudi Arabia's dependence on oil, while diversifying its economy and developing public service sectors. Health, education, infrastructure, recreation and tourism are all sectors that the Saudi Vision 2030 aims at growing by leveraging their culture, values, heritage and role among the Arab States, as well as its links with other world regions.
- To develop tourism, Saudi Arabia has launched a Red Sea luxury resort project; the development of a high-end luxury tourism complex, alongside the Neom and AlUla developments. In late 2019, Saudi Arabia introduced an e-visa program, allowing people from 49 countries to visit for a full month stay. Before this point, travellers could only enter for business, visiting acquaintances or for pilgrimage. Travel documentation has also been streamlined – an Umrah visa, which previously took 14 days to process, can now be obtained within 5 minutes.

Dubai 2040 master plan

- The Dubai 2040 Urban Master Plan was unveiled in March 2021 by Dubai Crown Price Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum.
- Among the plan's goals are regenerating older parts of the city, expanding green spaces, and delivering more public transportation, with the aim of making Dubai 'the best city in the world to live in' by 2040.
- There is also a goal to attract more visitors, with land area for hotels and tourist activities planned to increase by 134%.

Abraham Accords

- The Abraham Accords refers to agreements made between Israel and the United States, and the United Arab Emirates.
- The statements, (first signed in 2020), signify the 'normalisation' of relations between the countries.
- The accords opened the door to a much wider range of economic cooperation, including formal investments, between Israel and the UAE. The Abu Dhabi Investment Office was able to open its first overseas branch in Israel, and a number of Kosher restaurants were opened in the UAE to cater to Jewish visitors.

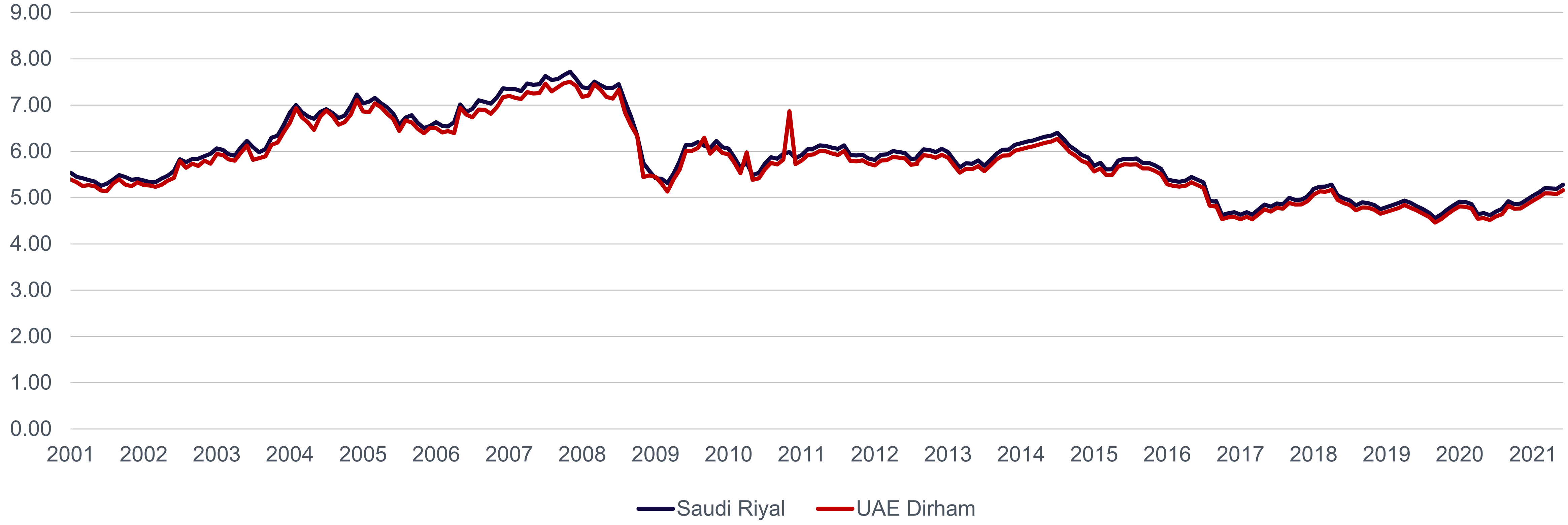
Qatar Blockade

- The Qatar diplomatic crisis began in 2017, when Saudi Arabia, the United Arab Emirates, Bahrain and Egypt severed diplomatic relations with Qatar, and banned Qatar registered planes and ships from utilising their airspace and sea routes, along with Saudi Arabia blocking Qatar's only land crossing.
- In early 2021, Qatar and Saudi Arabia agreed to a resolution of the diplomatic crisis, brokered by Kuwait and the United States. Saudi Arabia has re-opened its border with Qatar and begun the process for reconciliation. With the blockade removed, Qatar Airways will see significant benefits, as they were forced to drop 18 destinations from their network, and saw longer flight times due to detours.

Source: Saudi Vision 2030, ArabNews, GulfBusiness, US Department of State, UAE Government portal, Al Jazeera

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in SAR and AED)



Please find the most up-to-date exchange rate trend based on monthly averages on our website.

Source: Bank of England

3.2 Consumer trends

- When targeting Gulf nationals, it is important to keep in mind the differences between the markets and their cultures.
- Family life is important in these countries, and it is a frequent desire to spend more time with one's family. Religious values are also important. These will influence the way they will travel.
- The Gulf market is a key luxury travel market. Britain is well-regarded and a majority of wealthy Saudis and Emiratis choose Britain among the places they would definitely like to visit. Luxury travellers tend to consider London and Scotland as places where they could get the privacy and high level of attention and service they desire. Britain is also perceived as a great shopping destination for them, which is another key aspect of the ideal luxury holiday.
- The UAE is unique within the GCC for its high proportion, and variety of, expat residents. Research in early 2021 revealed that UK expats in the UAE spend on average 10.7 days on a visit to the UK, and spend on average £1,250 during their trip. To generate an additional £1m in inbound spend, the UK would need to encourage just under 1% of the UAE expat population to spend an extra 4 nights in the UK each year.

86%

of Gulf luxury travellers have Britain on their bucket list

Source: VisitBritain/Kubi Kalloo, VB/Kantar Millward Brown, Oxford Economics

3.2 Consumer trends: luxury travellers pre COVID-19 (1)

Focus on Gulf luxury travellers

- In 2017 VB commissioned Kantar Millward Brown to investigate the motivation and attitudes to holidays of international luxury travellers, including Mass Affluent* and HNWIs** from Saudi Arabia and the UAE.
- If the USA and the UK are top of their mind in terms of considered destinations for a luxury holidays, Spain and the Caribbean also rank high, as the weather is a key factor for choosing a destination. They may need reassurance on visa procedures.
- The UK is seen mostly as comfortable, historical and relaxing. London and Scotland stand out as potential luxury destinations in Britain. One-in-two would like to attend Wimbledon.
- These travellers want to feel relaxed and unique when they go on holiday: more so than other markets, Gulf luxury travellers are looking for personalised, high-standard, exclusive services. The top attribute defining a luxury holiday for them is to have a 'relaxing and hassle-free experience', with HNWIs quoting 'VIP treatment and excellent service' at every touchpoint first. Accommodation is the most important element of their trip and special attention should be given to it. Privacy is key. While in the UK, those travellers are looking for a luxury hotel or stately homes to stay. They would also appreciate high class dining experiences, preferring Michelin-starred restaurants, and shopping is a must, with brands such as Rolls Royce, Harrods, Aston Martin, the Claridge's, Wimbledon or the Chelsea stadium being well-known.
- About three-in-four respondents would look for a 'tailor-made itinerary' and 'authentic experiences', both essential parts of their luxury holidays. Most important for them is to go at their own pace, experiencing what matches their own interests at destinations, in an exclusive way. They would prefer to book experiences once at destination, rather than before.
- Word-of-mouth is key in terms of influences, and planning a holiday is exciting for most. Booking is done quite late, slightly ahead of the general market trend as they want to make sure they will have access to the right transport and accommodation options, preferring packages to booking all trip elements separately. Luxury travel agents are appreciated for booking, liaising with them mostly over the phone through their assistant. Online self-booking is more common among the mass affluent group.
- Only 51% would travel alone, they prefer to travel with their partner, friends and other family members.

86%
have Britain on their bucket list

47%
think 'historical' best describes Britain

London appeals to
72%
as a British luxury destination

62%
think Britain can meet their 'shopping needs'

49%
would dine at a Michelin-star or award-winning restaurant during their luxury holiday

Source: VB/Kantar Millward Brown 2017 research

* Mass Affluent are people with liquid assets valued over $150,000, but below $1 million; ** HNWIs are people with liquid assets valued over $1 million.

3.2 Consumer trends: luxury travellers pre COVID-19 (2)

United Arab Emirates: mature and aspirational market

- The UAE market has a ‘luxury mall’ culture.
- They are familiar with luxury brands, especially with the traditional European brands
- They know what they want, and are into design and the latest trends. Most young Emiratis want a brand that is visible; it is about making their social status recognised.
- Emirati luxury travellers are more likely than the Saudi ones to visit the UK because of the British fashion and car brands (81% vs 73%, and 81% vs 78% respectively).
- They would also be more likely to buy clothing than Saudis.
- Overall, shopping is more important to the Emiratis when they go on holidays than it is for Saudi holidaymakers. They would prefer to visit the flagship stores of the brands they like (56%).

Saudi Arabia: emerging and passive market

- With the latest developments in this country, the luxury consumer is changing as the market opens up.
- Most Saudis are looking for something unique.
- However, they still shop within a limited set of brands and require guidance and support from sales staff.
- Saudi luxury travellers are more likely than Emirati ones to visit the UK because of world-famous British brands and shopping experiences, such as Harrods (73% vs 68% respectively), or hotels and sports venues (68% vs 66%, and 76% vs 73% respectively).
- Overall Saudi travellers prefer to go shopping where a personal shopping experience is offered, or at local luxury department stores (65% and 59% respectively).

Kuwait: mature and assertive market

- Kuwaitis are familiar with brands and like to indulge.
- They know what they want. They have no problem choosing a brand simply because they like it.

Qatar: mature and following market

- Qataris are also quite familiar with luxury brands.
- However, similarly to the Saudis, they appreciate some support and guidance and would follow advice from others.

Source: VB/Kantar Millward Brown 2017 research

* Mass Affluent are people with liquid assets valued over $150,000, but below $1 million; ** HNWIs are people with liquid assets valued over $1 million.

3.2 Consumer trends: UK expats in the UAE

- The UAE is unique within the GCC for its high proportion, and variety of, expat residents. A large number of these are British, and UK expats living in the UAE constituted 31% of visits from this market in 2019. Three quarters of British expats who visit from the UAE come to visit friends and family.
- Research in early 2021 revealed that UK expats in the UAE spend on average 10.7 days on a visit to the UK, and spend on average £1,250 during their trip. To generate an additional £1m in inbound spend, the UK would need to encourage just under 1% of the UAE expat population to spend an extra 4 nights in the UK each year.
- Not every expat is the same. Therefore, research data was used to generate two different expat personas to give a flavour to who this group of travellers are. Read more about the two personas on the next two slides.

For expats living in the UAE, the UK is all about cultural comfort, the diversity of weather and scenery it offers

It has the people that made me who I am	It can be visited anytime of year
The UAE Expat thinks of the people back home when they think of the UK. The people are what make the UK special, and is what make the UK home.	UAE Expats are less bound by season and are more likely to come and visit the UK anytime. 52% visited the UK in the winter, and springtime and autumn time also proving popular. Unlike the majority of tourists, they can be enticed to visit anytime.
It feels safe to visit	**It has landscapes and coastlines**
The UK offers a safety net for our UAE expat. Amongst the different, diverse countries they are visiting, the UK offers a feeling of safety. It is their home, they know where to go, what to do and how to behave. It is reliable.	The UAE does not offer the most diverse range of terrain, boasting beautiful beaches and vast expansive deserts. The UK has greenery, calming walks across serene coastlines and beautiful landscapes that can't be experienced in the UAE.

Source: VisitBritain/Kubi Kalloo research, March-April 2021

3.2 Consumer trends: Expat persona 1 Reluctant Returners

Reluctant Returners like to come home to treat their friends and family, and show them how much they've changed

Who am I?

I'm a risk taker who loves being the centre of attention. I love my home in the UK, but it is a little bit of a chore for me to come all the way back!

What do I think about the UK?

The UK is my home. It's nurturing and homely and offers me an escape from my everyday UAE lifestyle. It's the people I love, who are warm, lovely and welcoming

What do I like to do on holiday?

Other than meeting my friends and family, I look for both gourmet / luxury food and local delicacies. I like to escape my everyday and meet new people whilst on my travels

So what does my UK trip need to have?

It has to include my friends and family, they won't forgive me otherwise! But I want to give back and treat my loved ones to wonderful, memorable experiences. A fancy meal out, or a wild night out; I just want to give them something they'll never forget.

Source: VisitBritain/Kubi Kalloo quantitative research March-April 2021

3.2 Consumer trends: Expat persona 2 Valiant Visitors

Valiant Visitors want to come back to the UK and see their home for all it's worth

Who am I?

I'm settled in the UAE with my partner and/or children. I love my lifestyle out here in the UAE and everything it gives me, but my eyes are starting to turn towards home and all it can offer

What do I think about the UK?

The UK is home. It's made up of the most wonderful people. In the most wonderful settings. The UK is like a great big hug, I just wish my visits weren't so stressful

What do I like to do on holiday?

Other than meeting my friends and family, I look to escape my everyday routine, through visiting coastlines and islands. I want to taste everything the country has to offer, be it the local delicacies, or a little treat

So what does my UK trip need to have?

I won't go unless I see my friends and family. But I want to see them in a relaxed setting, experiencing the beauty of the UK, going at a more relaxed pace

Source: VisitBritain/Kubi Kalloo quantitative research March-April 2021

3.2 Consumer trends: impact of COVID-19 (Saudi Arabia, 1)

Travel Intentions

- Due to the COVID-19 outbreak, Oxford Economics estimates that visits from Saudi Arabia to the UK were down by 72% in 2020 compared with 2019.
- VisitBritain's International Recovery Sentiment tracker (fieldwork 24th March – 5th April 2021) reveals strong travel sentiment from Saudi Arabia, with 86% of respondents 'definitely' or 'probably' considering taking an international leisure in the next 12 months, similar to wave 1.
- Positive sentiment was seen across age groups with but those aged 35-54 years showed the most interest (95%), followed by 18-34s (91%) and then 55+ (60%).
- Around 70% wanted to travel for a holiday and 47% intended to visit friends and relatives on their next trip (vs 34% global average).
- Of those intending to take a trip, only 2% have already booked, and 33% have decided which destination they will go to leaving the majority of travellers still open when it comes to their travel choice.
- The top activators for planning an international trip are an attractive offer, decrease in coronavirus cases at destination and relaxation of visa requirements. Receiving a vaccine and hygiene/safety protocols were also important.
- Saudi travellers in particular were more likely to say they intend to take fewer but longer holidays (76% vs 54% global average). They were also more likely to say that they would book through a travel agent in the current landscape and that they would think more about sustainability and the environmental impact when planning future holidays when compared to the global average.
- At time of fieldwork, Saudi sentiment showed a strong intention to travel as soon as possible with 82% saying they will travel internationally as soon as they get the vaccine and 86% saying they would be happy to comply with testing.

Key activators for an international leisure trip	KSA	All markets
An attractive offer	34%	43%
Decrease in coronavirus cases at destination	34%	34%
Relaxation of visa requirements	31%	32%
Receiving a Covid-19 vaccination	27%	28%
Hygiene and safety protocols in place at destination	25%	34%

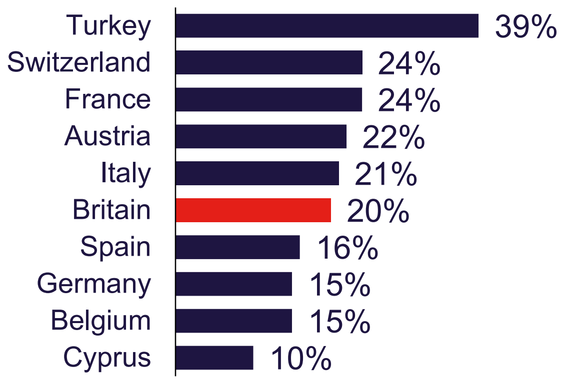
Source: TCI/ VisitBritain/ VisitScotland/ Visit Wales/ London&Partners. Note: Sentiment data is from a tracking study, and results may change in subsequent waves

3.2 Consumer trends: impact of COVID-19 (Saudi Arabia, 2)

Destination planning

- Europe was the most popular region for Saudi travellers' next international leisure trip (33%); however, 26% were considering Africa and 29% were considering the Middle East, suggesting a strong desire to also travel domestically and close to home.
- Within Europe, Britain was the 6th most popular market (20%) with Turkey, Switzerland, France, Austria and Italy ahead. For Saudis considering Britain, England was the popular nation (58%). The North West (39%) was the most popular destination within followed by the East of England (30%) and London (29%).
- At the time of fieldwork, Saudis perceived Scotland (57%) and England (57%) to be the safest nation within Britain when it comes to coronavirus. 54% thought Wales was safe; however, there were more close competitors pushing it further down the list in terms of safety ranking.
- Saudis were open to various booking channels with highest interest in online travel agents, comparison sites, direct with an operator and direct from an official destination website.

Top European destinations*



Travel Preferences

- Travel with spouse/partner is the most popular form of travel (72%), and 39% plan to travel with children under 18 (vs 28% global average).
- 46% of Saudis plan to stay in a hotel but are open to other accommodation. Cruises, boutique hotels, self catered properties were also popular.
- Saudis expressed interest in a wide range of destinations but were most interested in large cities, roaming around and coastlines.
- When it comes to activities during an international trip, Saudis were interested in a multiple but were most interested in visiting iconic attractions, doing outdoor/nature activities and shopping.

Destination types for an international leisure trip

Source: TCI/ VisitBritain/ VisitScotland/ Visit Wales/ London&Partners. Note: Sentiment data is from a tracking study, and results may change in subsequent waves.
*percentages show proportion within those considering a trip to Europe

3.2 Consumer trends: impact of COVID-19 (UAE, 1)

Travel Intentions

- Due to the COVID-19 outbreak, Oxford Economics estimates that visits from the United Arab Emirates to the UK were down by 72% in 2020 compared with 2019.
- VisitBritain's International Recovery Sentiment tracker (fieldwork 24th March – 5th April 2021) reveals strong travel sentiment from the UAE, with 86% of respondents 'definitely' or 'probably' considering taking an international leisure in the next 12 months.
- Positive sentiment was seen across age groups with 100% of those aged 55+ saying they wanted to travel internationally, which was highest across all markets surveyed.
- Around 76% wanted to travel for a holiday but 60% intended to visit friends and relatives on their next trip – the highest across all markets surveyed.
- Of those intending to take a trip, only 5% have already booked, and 36% have decided which destination they will go to, leaving the majority of travellers still open when it comes to their travel choice.
- The top activators for planning an international trip were an attractive offer and relaxation of visa requirements which were similar to the global total. A decrease in coronavirus cases at destination was most important but 9% less than the global average.
- UAE travellers in particular were more likely to say they intend to take fewer but longer holidays (73% vs 54% global average).
- At time of fieldwork, UAE sentiment showed a strong intention to travel in summer 2021 (40% for July and August) as well as 82% saying they will travel internationally as soon as they get the vaccine and 90% saying they would be happy to comply with testing.

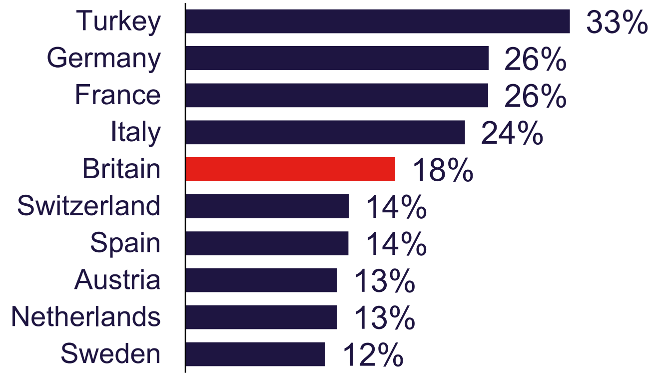
Key activators for an international leisure trip	UAE	All markets
Decrease in coronavirus cases at destination	34%	43%
An attractive offer	34%	34%
Relaxation of visa requirements	32%	32%
Receiving a Covid-19 vaccination	27%	28%
Hygiene and safety protocols in place at destination	27%	34%

3.2 Consumer trends: impact of COVID-19 (UAE, 2)

Destination planning

- Europe was the most popular region for UAE travellers' next international leisure trip (38%); however, 35% were also considering the Middle East, suggesting a strong desire to also travel domestically and close to home.
- Within Europe, Britain was the 5th most popular market (18%) with Turkey, Germany, France and Italy ahead. For Emiratis considering Britain, England was the most popular nation (64%). The North West (45%) was the most popular destination within followed by the East of England (34%) and London (31%).
- At the time of fieldwork, Emiratis perceived Scotland to the safest nation within Britain when it comes to coronavirus, followed by England and then Wales.
- Emiratis were open to various booking channels, with the highest interest being for online travel agents, comparison sites, direct with an operator and direct from an official destination website.

Top European destinations*



Travel Preferences

- Travel with spouse/partner is the most popular form of travel (64%), and 39% plan to travel with children under 18 (vs 28% global average).
- 47% of Emiratis plan to stay in a hotel but are also are open to other accommodation. As a stand out they are less open to private rentals and historic houses but more interested in hostel/university accommodation compared to the average.
- Emiratis are most interested in roaming around, visiting many types of places at a destination (51%) but are also interested in large cities (46%) and destinations with mountains/hills (43%)
- When it comes to activities during an international trip, Emiratis have a wider interest in activities compared to the average. They are most interested in visiting iconic attractions and outdoor nature activities for their next international trip. Shopping and outdoor activities were also of high interest.

Destination types for an international leisure trip

Source: TCI/ VisitBritain/ VisitScotland/ Visit Wales/ London&Partners. Note: Sentiment data is from a tracking study, and results may change in subsequent waves.
*percentages show proportion within those considering a trip to Europe

3.3 Booking and planning

- We will now look at the booking and planning patterns for international holidays for nationals of the two biggest outbound markets in the Gulf, Saudi Arabia and UAE, which will give us an idea of the overall trends for the Gulf.
- Overall, Gulf markets tend to have a short lead-in times in planning and booking their holidays. For example, about 12% of Saudi and Emirati travellers decided to visit Britain within a month of their trip, while only 7% did so on average across 20 source markets.
- Booking is often left to the last minute: 35% of Gulf visitors booked their trip to Britain within a month of visiting, which compares to 21% for the global average.
- While Gulf international travellers are usually quite tech-savvy, they are also more likely than average to pick up their phone or make a face-to-face booking to visit Britain.

Word-of-mouth, **price comparison** and **social media** are the leading influences for Gulf travellers to choose their next destination

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking type	Booking method	GCC	All markets
Travel only	Online	66%	85%
	Face-to-face	29%	10%
	By phone	5%	4%
	Don't know	0%	1%
Accommodation only	Online	43%	70%
	Face-to-face	24%	6%
	By phone	11%	3%
	Did not book/stayed with friends/relatives	17%	18%
	Don't know	5%	2%
Holiday (travel and accommodation)	Online	48%	64%
	Face-to-face	31%	26%
	By phone	20%	8%
	Don't know	1%	1%

- Booking online is less common in the GCC than in many other markets. Only two thirds of transport bookings, when booked independently from accommodation, were made online, compared to the all-market average, 85%.
- GCC visitors are also more likely to book a holiday (both accommodation and travel) face-to-face or over the phone than the global average (31% vs 26% and 20% vs 8% respectively).

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip

Purchase type	Purchase timing	Saudi Arabia	UAE	GCC	All markets
Theatre/ Musical/ Concert tickets	Pre	46%	32%	41%	30%
	During	27%	45%	34%	23%
Sporting event tickets	Pre	43%	44%	44%	24%
	During	18%	40%	26%	11%
Guided sightseeing tours in London	Pre	50%	51%	51%	28%
	During	26%	30%	27%	22%
Guided sightseeing tours outside London	Pre	49%	38%	45%	28%
	During	29%	39%	32%	19%
Tickets/ passes for other tourist attractions	Pre	49%	34%	44%	31%
	During	28%	34%	36%	41%

- Overall, Saudi and Emirati visitors are more likely to have purchased activities to undertake in the UK than the global average. They are also more likely to buy them in advance of the trip rather than during their stay in the UK.
- 74% of visitors from Saudi Arabia and the UAE say they like to carefully plan their holidays before they leave. However, 63% of visitors from these markets also say that they like to be spontaneous and decide on some itinerary details at the last minute.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

VisitBritain VisitEngland

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Saudi Arabia	UAE	GCC	All markets
6+ months	37%	44%	**39%**	45%
3-6 months	35%	30%	**33%**	31%
1-2 months	15%	14%	**14%**	13%
Less than 1 month	6%	10%	**7%**	5%
Don't know	7%	2%	**6%**	3%

Looking at options/prices

Lead time	Saudi Arabia	UAE	GCC	All markets
6+ months	9%	11%	**10%**	21%
3-6 months	28%	23%	**26%**	37%
1-2 months	35%	36%	**35%**	27%
Less than 1 month	20%	25%	**22%**	12%
Don't know	8%	5%	**7%**	4%

Deciding on the destination

Lead time	Saudi Arabia	UAE	GCC	All markets
6+ months	15%	16%	**15%**	32%
3-6 months	39%	46%	**42%**	38%
1-2 months	26%	20%	**24%**	19%
Less than 1 month	12%	14%	**12%**	7%
Don't know	8%	4%	**7%**	3%

Booking the trip

Lead time	Saudi Arabia	UAE	GCC	All markets
6+ months	7%	9%	**8%**	14%
3-6 months	22%	9%	**18%**	32%
1-2 months	27%	20%	**25%**	28%
Less than 1 month	34%	38%	**35%**	21%
Don't know	10%	24%	**15%**	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain: commentary (tables on previous page)

- Overall, visitors from Saudi Arabia and the UAE tend to have shorter lead-in times than most markets.
- UAE visitors start thinking about their trip to Britain even later than those from Saudi Arabia: 10% and 6% respectively started to think about their trip within a month of their departure date.
- Gulf visitors also decided on their destination later than most markets: while 32% across all markets decided to visit Britain 6 months or more in advance of their trips, only 15% of Saudi and Emirati visitors did so in the same timeframe.
- Over a third of them looked at options and prices only 1-2 months before their trips, and over 1-in-5 visitors from the UAE or Saudi Arabia did so in the month of departure itself (compared to 27% and 12% respectively for the all-market average).
- Finally, over a third of bookings to Britain were made by Saudi and Emirati visitors within a month of their trip or less, against 21% on average for previous visitors across all markets.
- Visitors from Saudi Arabia and the UAE are also more likely to book transport and accommodation, when these elements are booked separately, through an intermediary compared to visitors from most other markets.

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

- Mobile internet and social media are the two most useful channels to reach out to the GCC audience. They both are very effective platforms, especially leveraging social media influencers, as trust and recommendations are essential in these markets.
- Internet penetration is very high among residents of the UAE, at 99%, and it is at 96% in Saudi Arabia. Both Emirati and Saudi internet users aged 16-64 use the internet for over 7 hours per day. Mobile phones lead when it comes to web traffic by device in both markets.
- TV is still a very popular media in the GCC, and across the broader Middle East region, TV's market base stands at 50 million. Unlike the rest of the Middle East, the popularity of online TV streaming in the GCC is growing faster than the global average.
- Other traditional media have changed: GCC nationals are more and more likely to consume music, news and video content online.
- Newspapers and magazines have not disappeared, however. They just reach their audience now with the help of their website and other mobile apps and social media accounts.

Digitalisation

of content is key as newspapers, magazines, radio are often read, and listened to online, and even on mobile

Source: OERLive, MidEastMedia, Hootsuite Digital 2021, BBC Media profiles

3.4 Reaching the consumer: print media landscape

- During the latter decades of the 20th century, the Gulf states rapidly expanded their print media, and quality daily newspapers proliferated. Within the GCC, Saudi Arabia has the oldest newspaper tradition. Oman, Qatar, and Bahrain have had successful dailies only since the 1970s.
- There are two pan-Arab, Arabic-language newspapers – Al Hayat and Al Sharq Alawsat (both of which are published in the UK) – which have a strong influence in the wider Arab world, and are regarded for a high standard of reporting and features on Arab issues. Currently, there are no pan-Arab English language newspapers; however, the UAE's English dailies are available in most Middle East countries and their content is considered among the most reputable in the region.
- Most newspapers in the region have their own online edition, such as Gulf News and The National. Many trade-specific portals have come online, including HotelsMiddleEast, which has quickly gained popularity for reporting breaking travel and tourism news before appearing in its monthly publications.
- Main publishing companies in the area are Motivate, ITP Publishing and the Corporate Publishing International (CPI):
- The Arabic version of National Geographic, Business Traveller magazine, the leading magazine for the frequent business traveller, and the luxury travel expert Condé Nast Traveller Middle East are other magazines of interest for travel trends in the region.

UAE newspapers	Other information
Al-Bayan	Arabic daily, Dubai government-owned
Gulf News	Dubai based, English language
Khaleej Times	Private, Dubai based daily, English language
The National	Abu Dhabi based English language daily
Emirates 24/7	English language online publication

Saudi Arabia newspapers	Other information
Al-Watan	Abha-based daily
Al-Riyadh	Riyadh based daily
Okaz	Jeddah-based daily
Al-Jazirah	Riyadh based daily
Al-Sharq	Riyadh based daily
Al-Hayat	Saudi pan Arab daily, based in London
Al-Sharq al-Awsat	Saudi pan-Arab daily, based in London
Arab News	Jeddah based English language daily
Saudi Gazette	Jeddah based English language daily

Source: BBC Media Profiles, Encyclopedia.com

3.4 Reaching the consumer: broadcast media landscape

- TV is still a very popular media in the GCC, and across the broader Middle East region, TV's market base stands at 50 million TV households, dominated by satellite TV. TV in the Middle East has one of the highest shares of media ad spend in the world.
- Unlike the rest of the Middle East, the popularity of online TV streaming in the GCC is growing faster than the global average.
- Scripted content including international movies and Arabic-language TV series remain a key preference. Comedies and thrillers have started to gain more traction. However, there has been a rise in the popularity of talk shows, talent shows, game shows and reality shows over the past few years.
- The UAE is one of the region's key producers of local TV production, alongside Lebanon and Egypt. The local market is becoming distributed among fewer players, yet with more intense competition.
- Morning shows on MBC and Al-Arabiya TV are particularly popular. MBC is one of the market leaders in all general entertainment, news, movies, kids and drama across the Middle East, with people watching it from Morocco to Iraq daily.
- Some local Dubai TV channels have become very popular in the UAE, such as Emirates 24/7, a weekly news programme integrated with a website, and Studio One, a daily lifestyle show in English, on Dubai One.

UAE TV channels	Saudi Arabia TV channels	Kuwait TV channels	Qatar TV channels
Abu Dhabi TV	Saudi One	KTV 1	Alaraby
Ajman TV	Saudi Two	Kuwait Plus	Qatar TV
Sharjah TV	Al Riyadiah	KTV 2	Qatar 2
MBC	Al Ekhbariya	Al Majlis	Dohat Al Quraan
OSN		Al Gurain	beIN Sports
Al-Arabiya		KTV 3	Al Rayyan
Sky News Arabia			Al Kass
Abu Dhabi Media Company			Qatar Today

Top TV streaming services in the GCC

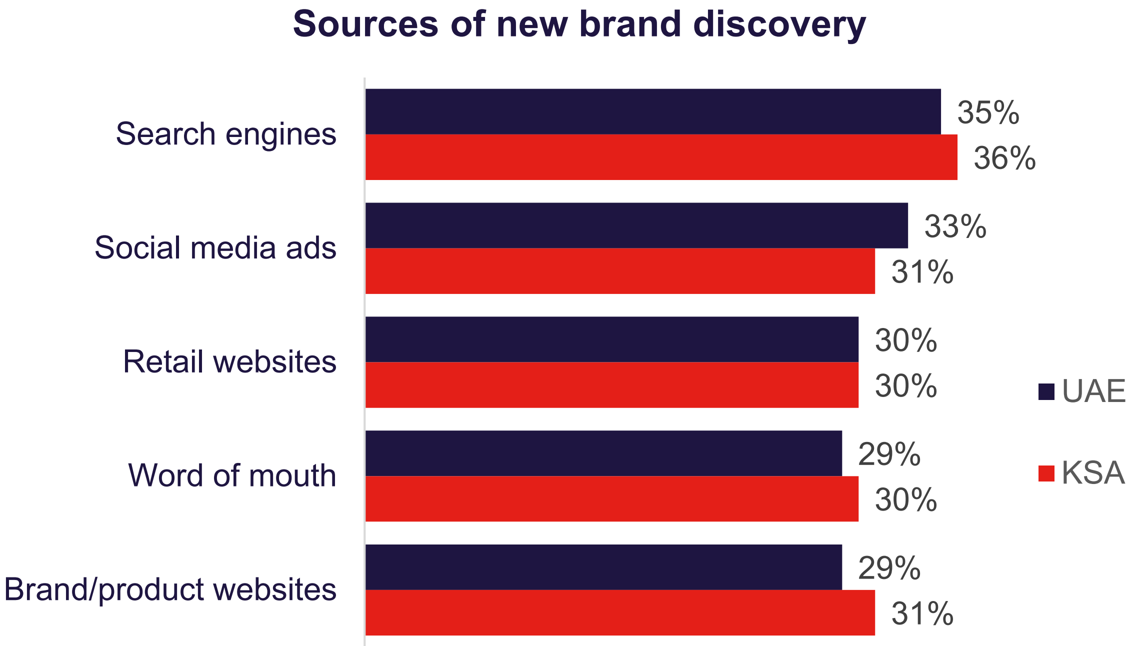
Platform	Other information
Netflix	The platform has 47.4m subscribers in the region
Amazon Prime Video	Launched in the UAE and other parts of the GCC in 2019
Starz Play	Number one in the MENA region and brings a wealth of Arabic content
OSN Streaming	A one stop shop that brings together HBO, Comedy Central, Disney Channel etc. for the GCC

Source: BBC Media Profiles, MidEastMedia, OERLive

3.4 Reaching the consumer: internet and social media (UAE & Saudi Arabia)

- Internet penetration is very high among residents of the UAE, at 99%, and it is at 96% in Saudi Arabia. Both Emirati and Saudi internet users aged 16-64 use the internet for over 7 hours per day; roughly double the time spent watching TV (either broadcast or streaming).
- Mobile phones lead when it comes to web traffic by device in both markets, followed by laptops and desktops.
- Internet users in both markets are most likely to spend their time online watching online videos and vlogs.
- Social media penetration in the UAE was at 99% in early 2021, and 80% in Saudi Arabia. Internet users in both markets have 11 social media accounts on average.
- Due to the coronavirus pandemic, the worth of the travel, mobility and accommodation e-commerce category shrank by 49% in the UAE, and 46% in Saudi Arabia in 2020 vs. 2019.

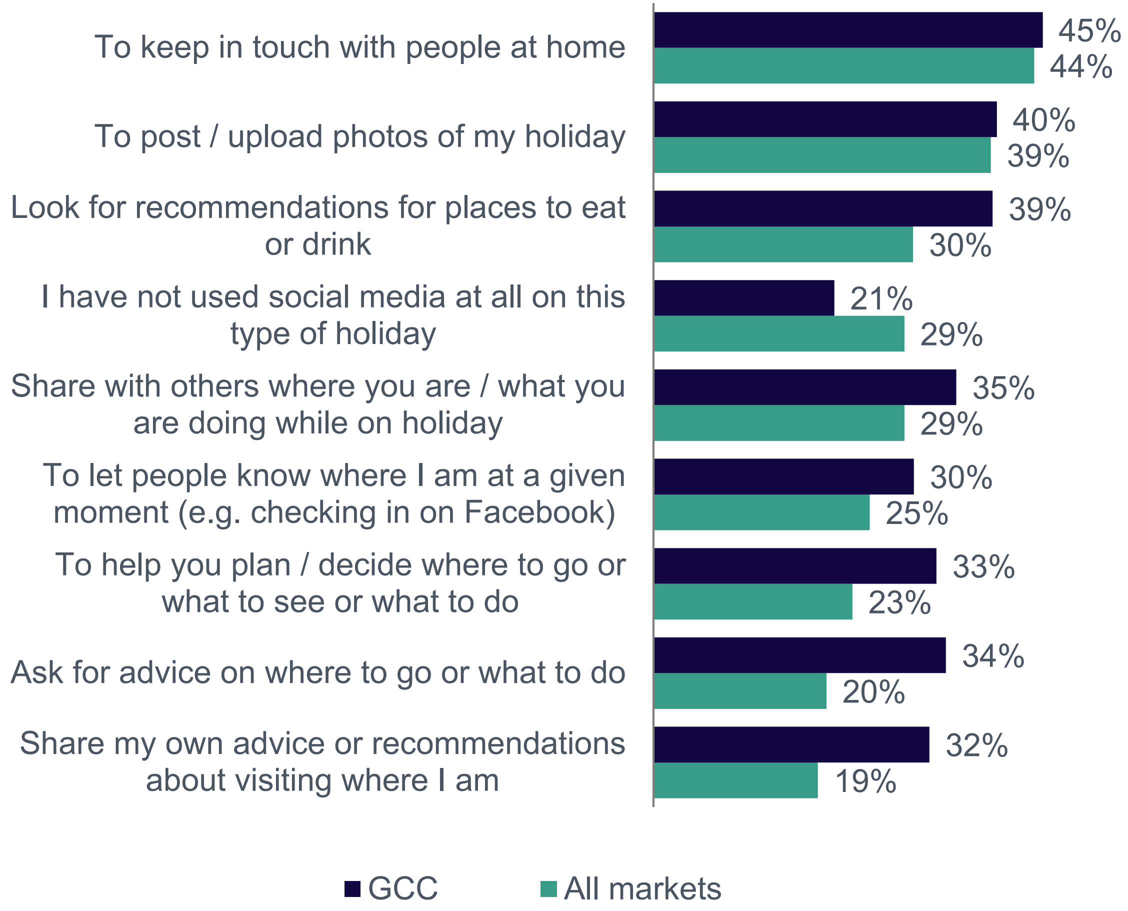
Most used social media platforms UAE	Most used social media platforms KSA
YouTube	YouTube
Facebook	WhatsApp
WhatsApp	Instagram
Instagram	Facebook
Facebook Messenger	Twitter
Twitter	Facebook Messenger
LinkedIn	Snapchat
TikTok	TikTok
Skype	LinkedIn
Snapchat	Pinterest



Source: Hootsuite Digital 2021

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

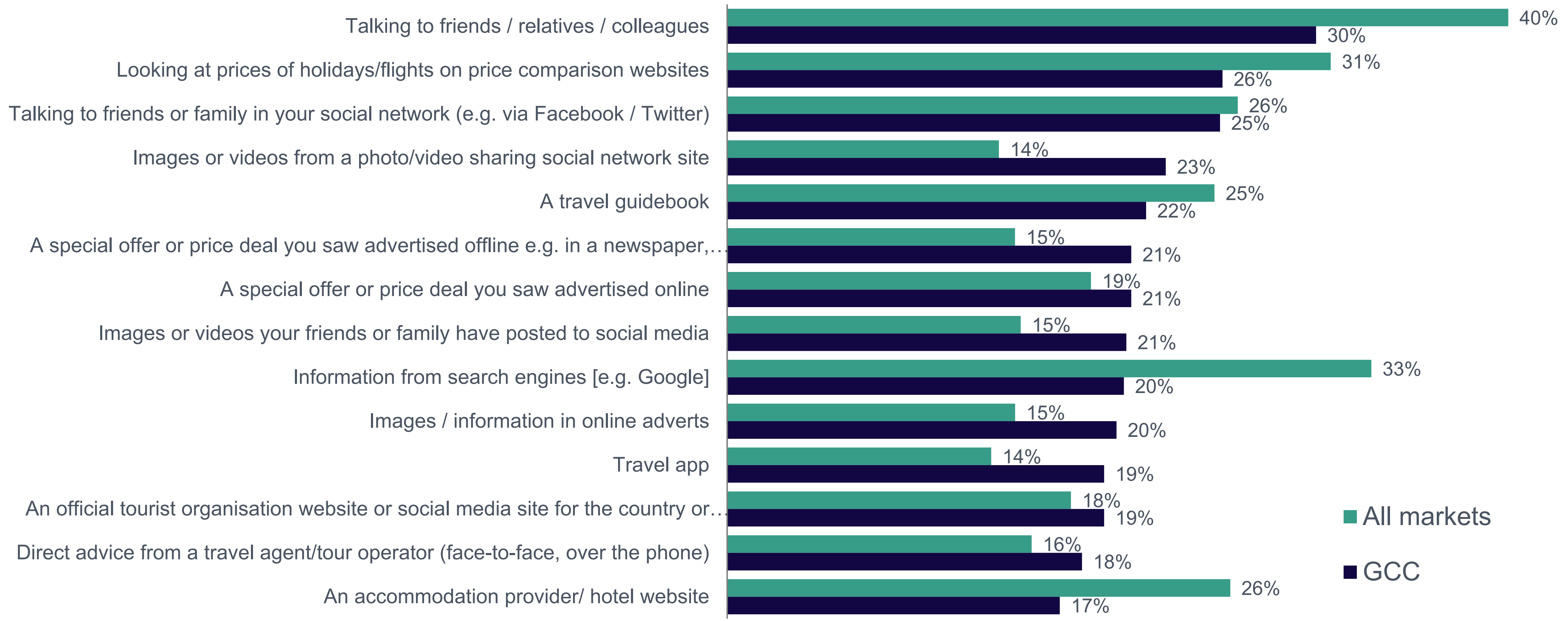


- 79% of GCC travellers state that they use social media on holiday; more than the all-market average of 61%.
- The most popular use of social media while travelling is to keep in touch with people at home. The next most prominent is to upload photos of their holiday, and then to look for recommendations for places to eat or drink.
- GCC travellers are particularly likely to over-index on using social media to ask for advice on where to go or what to do, and to share their own advice and recommendations, suggesting a savviness towards peer input and word of mouth when it comes to planning activities.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?, Statista 2019

3.4 Reaching the consumer: influences (top 14)

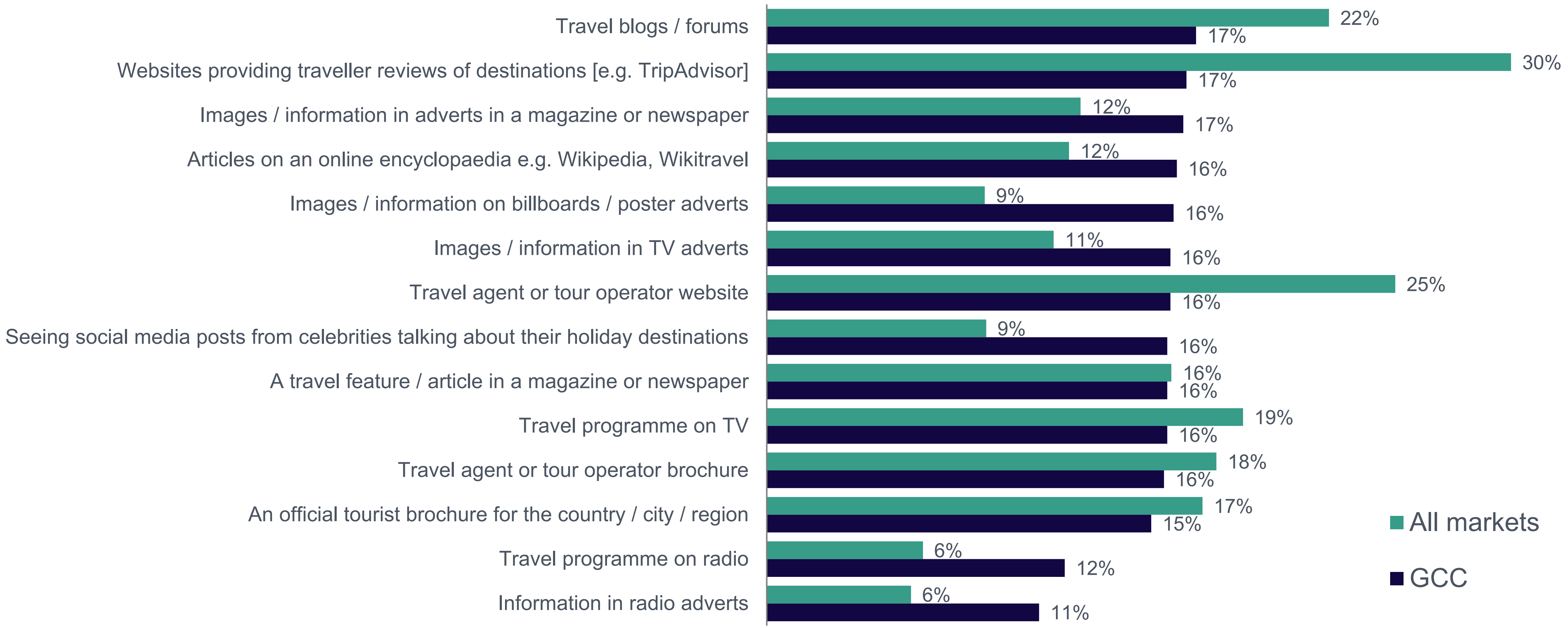
Influences on destination choice – top 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences (bottom 14)

Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

VisitBritain VisitEngland

Access and travel trade

Chapter 4

Getty Images/ Gordon Edgar Images

4.1 Access: key facts

- All GCC visitors departing Britain by air pay £82 in Air Passenger Duty. A standard visitor visa will cost £95 and allow GCC nationals to stay up to 6 months. All visitors from Bahrain and Saudi Arabia need a visa to visit Britain. Kuwaitis, Omanis, Qataris and Emiratis can also apply for a £30 electronic visa waiver for the same stay period.
- In 2019, twelve airlines in total flew directly from the GCC to the UK, including nine Gulf carriers, plus British Airways, Virgin Atlantic and TUI. In addition to direct flights, Royal Brunei Airlines and Qantas used Dubai as a stopover between their countries and the UK.
- Because of their location, the GCC airports had become transit bases for visitors going from Asia and Oceania to Europe. This allowed Emirates, Qatar Airways and Etihad Airways in particular to develop their routes and boost capacity and regional spread to the UK, in 2019 linking on regularly scheduled routes 10 airports in GCC to 10 airports in the UK.

Due to the COVID-19 outbreak, seat capacity between the GCC and the UK was down by 56% in 2020 compared to 2019. Seat capacity in 2021 to date (January-September) is 96% lower than the same period in 2019. However, scheduled seats are set to increase each month towards the end of the year, thanks to more favourable policy conditions for inbound travel.

97%

of GCC visitors travel to the UK by plane

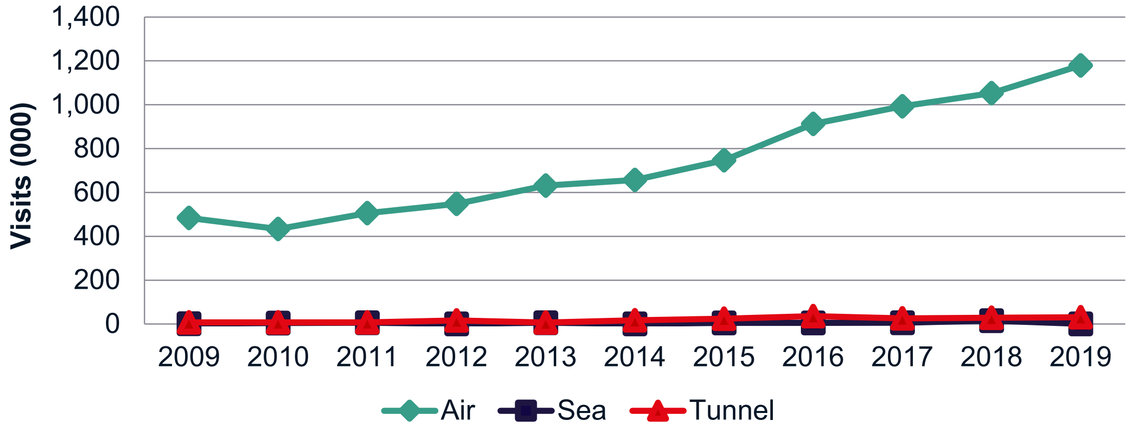
Access to Britain

Measure	2019
Weekly aircraft departures	403
Weekly seat capacity	147,216
Airports with direct routes in the GCC	10
Airports with direct routes in Britain	10

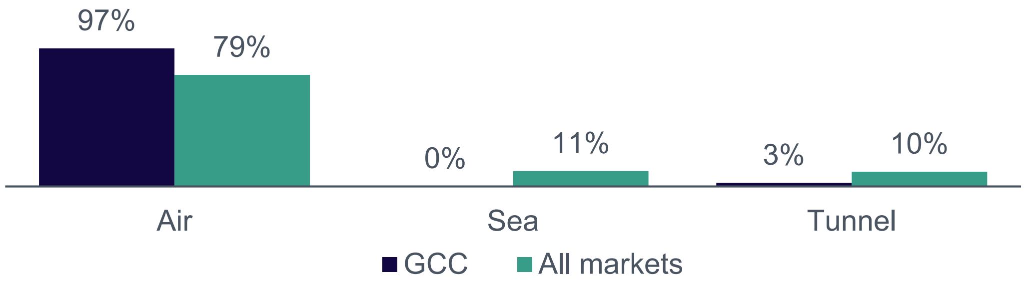
Source: Apex, direct flights only, UK Government

4.1 Access: mode of transport

Visits by mode of transport



Annual share by mode (2019)



Share by mode per market (%) in 2017-2019

Share of visits…	Air	Sea	Tunnel
Bahrain	99%	-	1%
Kuwait	96%	0.1%	3%
Oman	100%	-	-
Qatar	94%	2%	5%
Saudi Arabia	97%	1%	2%
UAE	97%	1%	2%
GCC	**97%**	**1%**	**3%**
All markets	**78%**	**11%**	**11%**

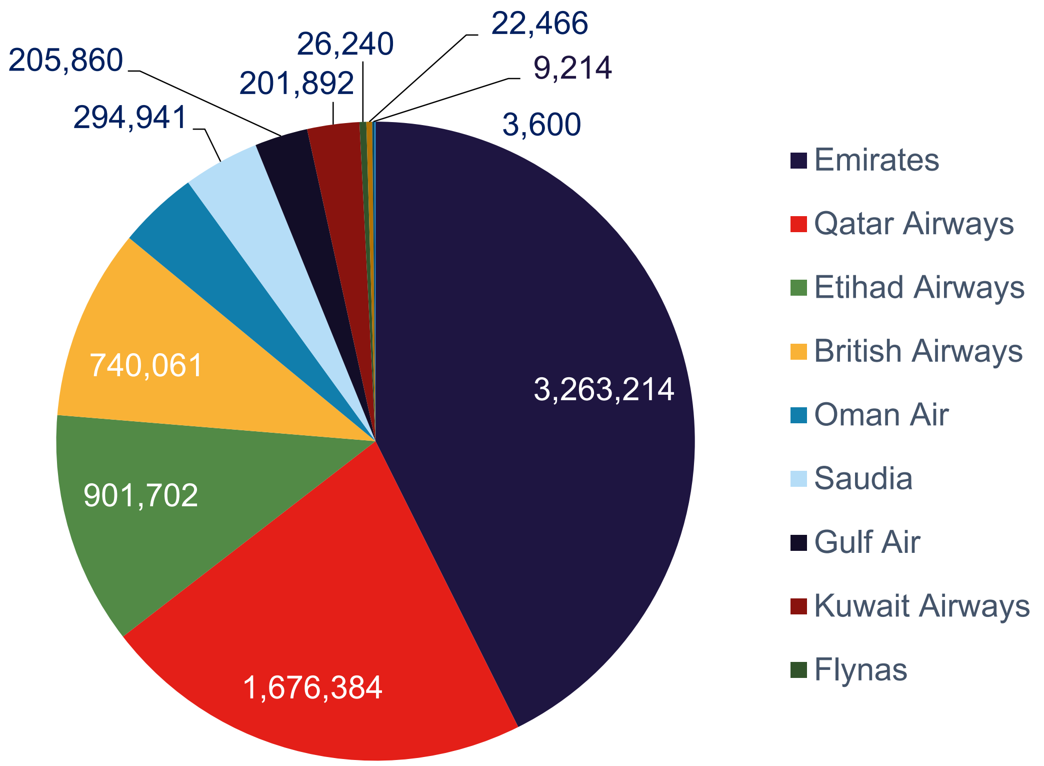
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends

Weekly average seat capacity on direct flights to Britain	2009	2014	2019
Bahrain	7,109	4,358	5,505
Kuwait	3,805	4,052	5,745
Oman	1,654	1,614	6,342
Qatar	10,877	14,378	33,605
Saudi Arabia	6,309	9,039	8,738
UAE	53,790	77,035	87,282
GCC	**83,542**	**110,478**	**147,216**

Airline seat capacity by carrier (2019)

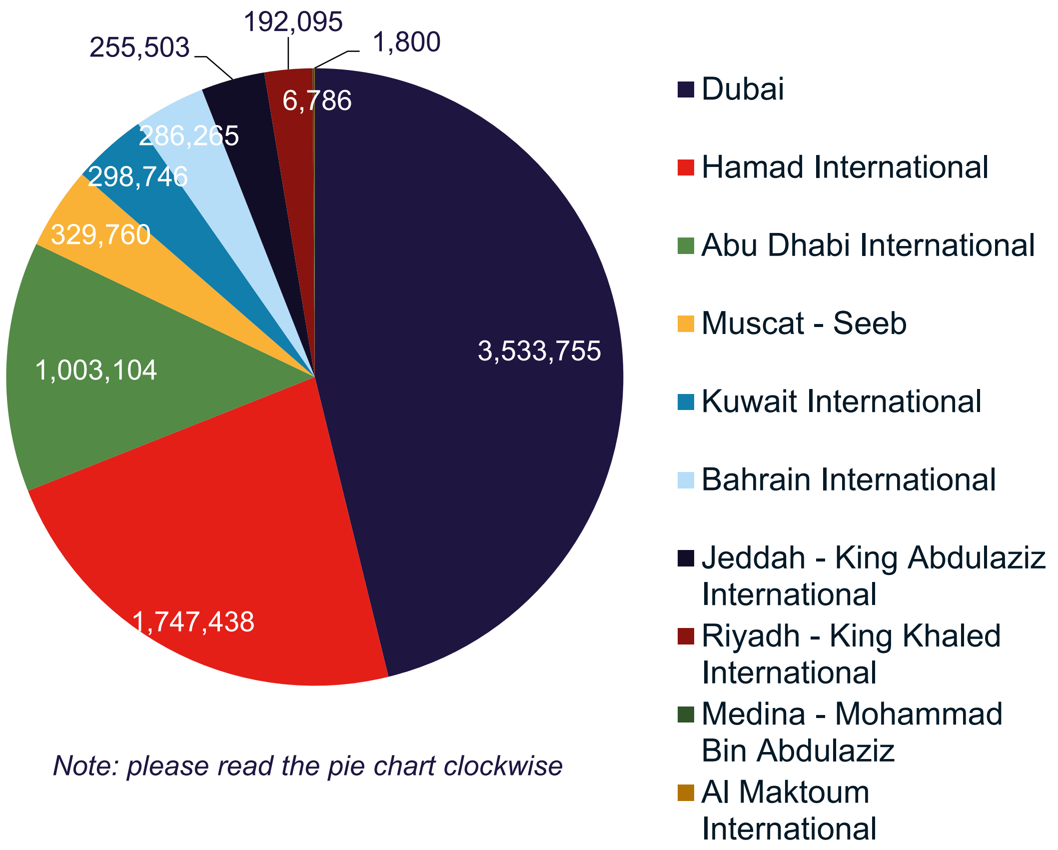


Note: please read the pie chart clockwise

Source: Apex 2019, non-stop flights only

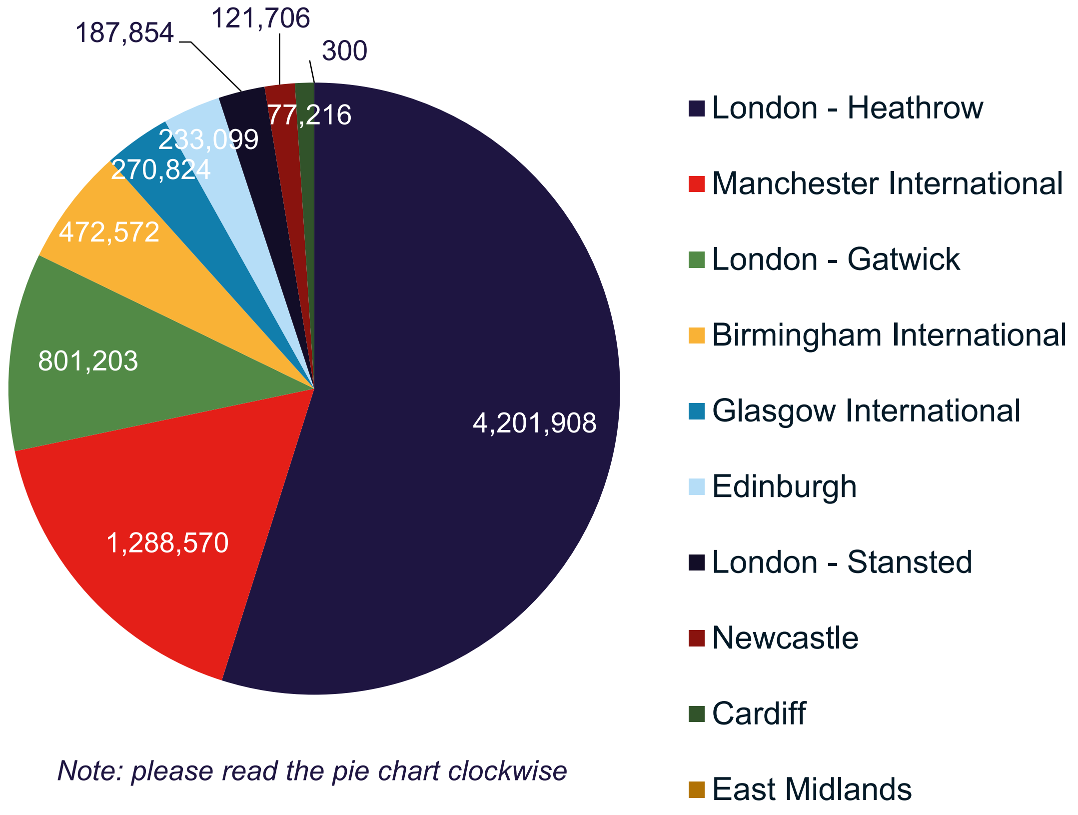
4.1 Access: capacity (2)

Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Destination airport seat capacity (2019)



Note: please read the pie chart clockwise

Source: Apex 2019: non-stop flights only

4.2 Travel trade: general overview

- The Gulf travel trade landscape is quite fragmented. There is not one GCC culture, and each market has its specificities. Getting to know them in advance is well appreciated.
- Most agencies in the Gulf are quite small and operate only in the city or area where they are based. They usually act as ticketing offices, and many have limited knowledge of what is on offer at the destinations they sell. However, some larger, more established travel service companies will have operations in multiple markets and distribute more integrated services.
- The holiday divisions of the main Gulf carriers usually tend to play a wholesaler role, as there are only a handful of them in the GCC.
- When liaising with partners in the Gulf markets, building a trusting relationship is key. Visiting your counterparts in the markets, inviting them to discover your products and services and demonstrating a good understanding of the markets' culture and their differences are important.

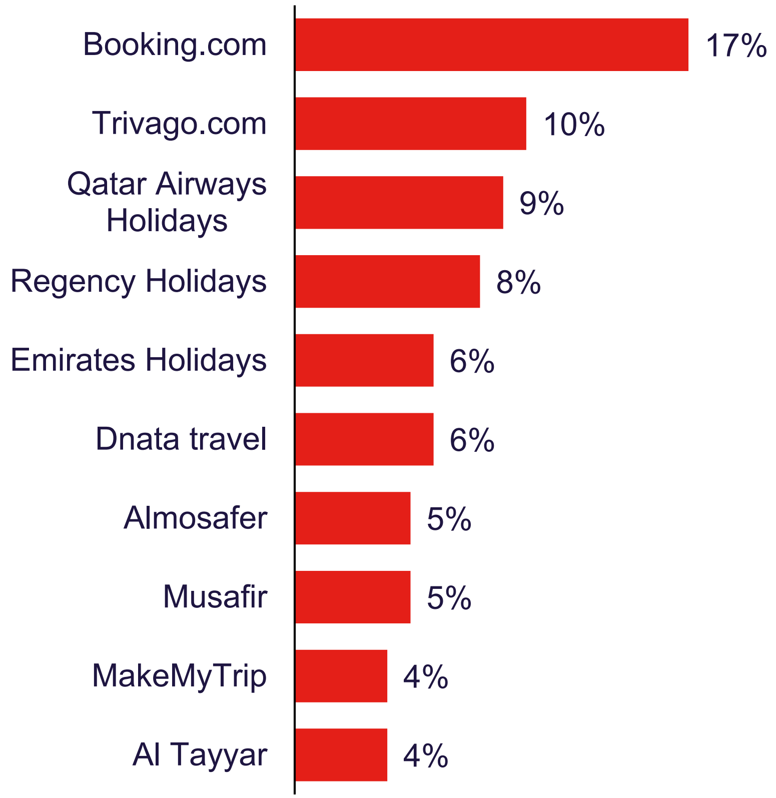
Saudi Arabia and the UAE are in the **top three** tourism markets in the Middle East

4.2 Travel trade landscape

- There are well over 6,000 travel agents and tour operators in the Middle East, of which 60% are concentrated in the three main tourism markets: Egypt, Saudi Arabia and the UAE. Each accounts for between 1,000-1,500 travel agents. The UAE has the main concentration of licensed travel agents: 60% of these are based in Dubai, 20% in Abu Dhabi, and the rest in Sharjah and the Northern Emirates.
- However, in the Gulf area in general, as in the UAE, the majority are small operations and are primarily ticketing agents with a focus on airline ticket sales as their main activity, and limited product knowledge aside from that. By and large, the majority of those travel agencies operate from a single location in their country.
- The larger, more established companies operate in multiple markets within the GCC. They tend to be part of diversified, integrated business groups with activities in multiple areas such as trading, retail, construction, transport, logistics, etc. As a result they are usually financially strong, and have access to some in-house businesses, and almost without any exceptions, would be the General Sales Agent (GSA) for one or more international airlines.
- With only few GCC wholesalers, airlines and their holiday divisions tend to offer this service, with the exception of 10-15 major operators based in the region. Those also operate as retail travel agencies. A number of the largest travel management companies are also general sales agents for international airlines, car rental and hotel groups.
- These markets show a preference for family travel, with a high emphasis on individual tailored arrangements. However, airline and holiday packages are gaining momentum, allowing customers to obtain better value. Consumers can be easily swayed on choosing their holiday provider by even a marginal price difference. As a consequence the market tends to be highly competitive: most agents in the region operate on high volume and low margins.
- On a smaller scale, a number of leading travel agents offer holiday packages through the year, to various destinations. Special efforts are made to promote 2-3 night packages during short breaks such as the Eid Holidays, National Day holidays, the New Year and other long weekends. Travel packages of 7-14 nights duration and longer are usually promoted for summer holiday travel. Gulf travellers have shown a preference so far towards Turkey or Asia for short breaks, and towards Europe for longer periods of time.

4.2 Where to find the trade in the markets

Top of mind travel brands for GCC residents



Focus on the UAE

- The Abu Dhabi Travel and Tourism Agencies Committee (ATTAC), established in 2000 with the support of Civil Aviation department of this emirate, is the largest association of travel agents in the UAE, with over 250 members. Airlines are the main providers of holiday destination products through their holiday divisions:
  - The most prominent is Emirates Holidays (EKH), a division of Emirates Airlines. Its brochure covers over 100 destinations across six continents with a variety of accommodation options.
  - Etihad also set up Etihad holidays in November 2003 with the aim of creating and offering holiday packages to suit a wide range of budgets and tastes. Currently they offer a choice of over 201 hotels and 35 destinations in 17 countries.
  - Several regional and international airlines also promote their destinations and packages in the UAE through travel brochures and catalogues. For example, the Exclusive Travel Group helped Qantas Airways promote luxury outbound travel to New Zealand, Australia and the South Pacific to high net worth travellers based in the GCC markets.
- The largest retail travel service company in the UAE is Dnata. Its specialist leisure division, Dnata Holidays, features a wide choice of destinations and products targeted towards the expat population in the UAE.

Source: Gulf News. Arabian Industry, Middle East Consumer Travel Report 2018

4.2 Travel trade: some practical information

General information

- The GCC is not a single market: take the time to learn about demographic differences across the regions.
- Relationship management is crucial: the GCC travel trade prefer to do business face-to-face, it is not an email-based culture. So it is highly recommended to have regular sales visits to the region in order to develop rapport and trust. Inviting them to experience your products and services first-hand is also appreciated. It is about long-term engagement and commitment, and building that trust above simply pushing business through. A nice gesture would be to acknowledge key holidays in the year (i.e. Ramadan & Eid) and to send them a greeting card – e.g. Eid Mubarak.
- Gulf travel agents expect competitive prices, flexible payment terms and agreement to last-minute changes.

Planning and contracting cycle

- Key times for promotional visits to the region are February through to late May/early June and September through November. Avoid Ramadan, Eid holidays and the summer period beginning end of June through to the middle of September. The working week for government offices, departments and schools in all GCC markets is Sunday through to Thursday.

Trade exhibitions

- Arabian Travel Market (ATM) is universally recognised as the travel industry event for the Middle East and the Pan-Arab world. Serving the whole region, including GCC states, Arabian Travel Market is the premier regional forum for outbound tourism. It is an ideal platform to generate new business leads, raise your company awareness and capitalise on extensive business, networking and educational opportunities. ATM is organised by Reed Exhibitions and takes place at World Trade Centre, Dubai annually in the first week of May.
- The Gulf Incentive, Business Travel & Meetings Exhibition (GIBTM) is the leading event for meetings, incentives and business travel in the GCC Region, unlocking business potential within the Middle East for inbound and outbound business professionals.
- Business Tourism destinations from the Middle East and around the world showcase a diverse range of products and services to enhance any meeting, conference, incentive or business travel booking for corporate, association and agency event planners and buyers. GIBTM is held every year at ADNEC, Abu Dhabi in the last week of March.

4.2 Travel trade: doing business with the Gulf markets (1)

Other practical information

- **Time difference:** GST is the Gulf standard time, and is 4 hours ahead of Britain in winter and 3 hours ahead in the summer (GMT +0400).
- **Climate:** The climate of the GCC countries generally is hot and dry. The hottest months are July and August, when average maximum temperatures reach above 40°C. November to March is the most pleasant weather and reach between 18-30°C.
- **Working days and business hours:** The working week traditionally starts on Sunday and ends on Thursday. Friday and Saturday are the official days of rest, though in the travel trade industry agencies will do shift work so 6 days a week are covered for booking purposes. Friday is the Muslim day of prayer and rest and so scheduling meetings or making phone calls to Muslim colleagues or clients on this day should be avoided. Office hours tend to be 0800-1900 with some agencies still doing a split shift with a break between 1pm and 4pm.
- **Transport:** Getting around is relatively easy with signs in Dubai and most cities are generally in both Arabic and English, as well as the telephone automation system allowing you to choose between the two. Nevertheless once you are outside the cities, you will find that English is not easily understood by rural people. As the Gulf population also includes a large proportion of migrants from South Asian countries, knowledge of Hindi, Urdu, Malayalam, Bengali and Tamil can be quite useful. Taxis are a relatively cheap way to get around in most cities.
- **Clothing:** Do respect the culture of the country you are going to by dressing appropriately. While the UAE is more Westernised than many other Middle Eastern countries, it is still important to dress modestly: men should wear a suit and women ensure their clothing covers their legs and arms. In Saudi Arabia, women should also cover their head for example.
- **Visas:** You may need a visa to visit some of your Gulf working relations. Please do plan in advance, as for example you will need to justify your business appointment when applying for a Saudi visa.

4.2 Travel trade: doing business with the Gulf markets (2)

Meetings & business etiquette

- Meetings should be scheduled with some extra time allocated. Attitudes to time in the GCC are much more relaxed than in many Western cultures. People and relationships are more important than schedules and punctuality. It is not uncommon, therefore, for your Gulf counterparts to arrive late but foreigners are expected to be on time. Meetings are also conducted at a leisurely pace, so longer than what you can be used to.
- Business meetings with Arab clients or colleagues are about building a personal relationship with your counterparts and so it is common meeting start by asking about their families or some polite general conversational topics, before talking business. Invitations to a meal or social event are also common and should be accepted to help building trust.
- It is usual to call business relations by their first names in most cases. If unsure, it is best to get the names and correct form of address of those you will be doing business with beforehand.
- Avoid to plan meetings during the Muslim prayer times or any of the major Islamic holidays, such as Ramadan or Eid.
- During Ramadan, the Islamic month of fasting, Muslims are not permitted to eat, drink or smoke between sunrise and sunset. Muslim hospitality allows that non-Muslims may be invited to eat and drink by their hosts, but it would be best to do so in private, as a sign of respect, with this advice also extending to the consumption of bottled water despite heat.
- There might be other people present in the office or meeting room waiting their turn to meet with the person you are talking to. If you are made to wait when you arrive, it is polite to greet people that may be in the room, take a seat and accept any coffee served until it is your turn.

4.2 Travel trade: GCC holidays

National public holidays

National Holiday	Date in 2021	Observance
New Year's Day	01/01	Bahrain, Kuwait, Oman, Qatar, UAE
National Sports Day	09/02	Qatar
Kuwaiti National Day and Liberation Day	25/02 – 26/02	Kuwait
March bank holiday	07/03	Qatar, Saudi Arabia
Isra'a Wal Miraj/ Leilat al-Meiraj	12/03	Kuwait, UAE, Oman
May Day/ Labour Day	01/05	Bahrain
Ramadan begins	12/04	UAE, Saudi Arabia
Eid-al-Fitr	Between 12/05-13/05	Bahrain, Kuwait, Qatar, UAE (3 days), Oman, Saudi Arabia (4 days)
June Solstice	21/06	Saudi Arabia
Renaissance Day holiday	25/07	Oman
Hajj season begins	11/07	UAE
Arafat Day and Eid-al-Adha	Between 09/07 and 19/08	Bahrain, Qatar, Kuwait (3 days), Oman, Saudi Arabia (3 days), UAE (4 days)
Muharram/ Al-Hijira (Islamic New Year)	09/08-10/08	Bahrain, Kuwait, Oman, UAE
Ashoora	18/08	Bahrain
Saudi National Day	23/09	Saudi Arabia
Omani National Day	18/11	Oman
The Prophet's Birthday	18/10	Bahrain, Kuwait, Oman, UAE
Commemoration Day	30/11	UAE
Emirati National Day	02/12	UAE
Bahraini National Day	16/12	Bahrain
Qatari National Day	18/12	Qatar

Source: Time and Date, Office Holidays, and other official sources

- All calendars in the GCC respect days off around the two main Muslim celebrations: the Eid-al-Fitr (ending of Ramadan) and the Eid-al-Adha (ending of the Hajj), which varies in dates according to the Islamic lunar calendar.
- Weekend runs Friday-Saturday in all GCC countries and used to be on Thursday-Friday.
- The paid holiday allowance varies depending on the market:

- Bahrain: 21 days plus public holidays
- Kuwait: 30 days plus public holidays
- Oman: 30 days plus public holidays
- Qatar: 15 days plus public holidays
- Saudi Arabia: 21 days plus public holidays
- UAE: 30 days plus public holidays

4.3 Caring for the consumer: culture is important, and diverse (1)

Getting your marketing right

- The localisation of your marketing strategy is important for this market. Developing GCC-friendly marketing assets helps a lot in winning over this market. It extends to more than simply accurate translation or your international marketing material. Remember to use a qualified translator; Google translate is not recommended. Arabic-first content and using images that are relevant to the audience are important to respect the market's cultural sensitivity, most of all in Saudi Arabia.
- Be mindful of the type of language or images used in marketing or promotional activities. Imagery for these markets should stay away from showing couples being too close, women with bare shoulders or short clothing.
- There are several agencies that can help with this, who specialize in writing for visitors. It is also worth investing in some still and moving imagery that shows GCC nationals enjoying your product. These are likely to be used much more widely by GCC media and third parties than images of Western customers. Word of mouth is a highly trusted and impactful communication tool, and using local social influencers is a very effective medium to showcase your product or brand.
- However, an expensive campaign or costly print or digital artwork is not necessary as long as the information is in places they can identify and access easily.
- Having an understanding of the norms and expectations is needed for each Gulf market. It should include what welcome and hospitality means to them. Direct recommendations go a long way and so a simple gesture can be a quick win.

4.3 Caring for the consumer: culture is important, and diverse (2)

Cultural differences and similarities within the Gulf

- These countries are very different. UAE alone is diverse: its population is made of a majority of expats – Indians and other Asian nationalities plus Western nationalities.
- For that reason, stereotypes are often misleading. For example, not all GCC visitors require halal food, as many of them may not be Muslim. Experiencing an array of cuisine including local dishes is important to them. And so if it is not essential that the food is halal, it might be preferable to just highlight if it contains alcohol or pork so that they can choose for themselves. Keeping a few vegetarian options will also be useful as many GCC expats come from Asia and may prefer that type of food.
- The UAE tends to be a more open society, while other GCC countries are more traditional, and very family-focused. Trends are changing too. Saudi Arabia is usually seen as quite conservative, though the Saudi Vision 2030 might lead to great changes in the Saudi society with the development of domestic tourism or the re-opening of cinemas for instance.
- GCC nationals are overall comfortable with modern technology: they are highly active on social media, and mobile penetration in this area ranks among the highest globally. Engaging those customers through digital content and reaching out to them on social media are key. Information provided through mobile-friendly websites or apps is appreciated.
- Despite GCC visitors being among the top travel spenders, they still look for a competitive offer: make any added benefits to your product or service clearly visible to add value to yours.

4.3 Caring for the consumer: hospitality tips (1)

Accommodation

- As Gulf tourists often visit with their family, and sometimes their extended family, they will prefer suites and inter-connecting rooms in hotels as they would allow the whole family to stay together, with parents having an easier access to their children.
- Entertainment for the children is important and there is a growing interest in holiday resorts such as Oasis, Center Parcs and Butlins, or themed entertainment parks and resorts.
- In the UK though, research has shown that travellers who did not stay with friends and relatives would more likely prefer to stay at hotels or rent a place for the time of their stay.
- Especially among nationals luxury travellers, luxury five-star hotels and high-quality rentals, such as stately homes are highly appreciated. There is a need for privacy that is very important for that segment. They will also value concierge services as they may need advice and support planning the last elements of their trip such as activities, before their trip or even at destination.
- With London and Manchester being their preferred English destinations for a luxury holiday, city centre locations are the most popular. Air conditioning in London hotels during the summer is a big selling point.
- Staying in alternative forms of accommodation such as cottages and castles in the country can be seen as more adventurous. Gulf travellers, especially nationals, would need to be reassured on easy access from the place where they would stay to city centre facilities, the availability of a private car with chauffeur, and of all modern facilities and technologies.

4.3 Caring for the consumer: hospitality tips (2)

Food and drink

- Dining in restaurants is one of the most popular activities for GCC visitors in the UK. Research shows that visitors in each GCC market are more satisfied with Britain's food and drink offer than the global average (79%): 81% of visitors from Oman, 83% from Saudi Arabia, 87% from the UAE, 92% from Bahrain, 93% from Qatar, and 94% from Kuwait.
- Emirati and Saudi nationals would especially be aware of British baked goods, and interested in trying British cheeses.
- If visitors from the GCC may have very different profiles, they usually sleep and wake up late on holiday, which makes lunch and dinner preferred meals. However, serving late breakfast options outside of usual times will be appreciated. Most are used to an international type of breakfast.
- During meals, Arabs will eat meat dishes as well as drink water or fruit juices. Consuming pork and alcohol are strict Muslim taboos so it is critical to specify which foods contain these, or having Halal options on your menu, providing food (especially meat) made according to the Islamic method.
- Lunch is the main family meal and usually includes rice. Dinner is lighter. Both are taken late (around 2pm and 9-11pm respectively). During Ramadan it would be appreciated if hotels could offer an iftar buffet at sunset for Muslims breaking their fast.
- Tea (served clear, with sugar and the tea bag or leaves still in) and coffee (which is boiled in the Arabic culture) are prominent features of Arabian life. It is considered rude to decline a coffee since the tradition of offering coffee is symbolic of hospitality. When they have had enough tea or coffee and don't wish for a refill, they will turn the cup upside down.

Source: IPS, VisitBritain Food Research 2017

4.3 Caring for the consumer: hospitality tips (3)

Language

- Arabic is the official language in the Gulf countries.
- However, English is widely spoken, especially among the expat community and for business.
- Knowledge of language basics will always be appreciated among Gulf visitors.

Welcome

- The Gulf high-end hotels and airlines have set new standards in terms of hospitality. Those are what Gulf visitors, especially luxury travellers, are used to.
- Making guests feel welcome is very important in the Gulf culture. In the Emirati culture, receiving guests is an honour.
- Offering some dates and non-alcoholic beverages on arrival is well appreciated. So would be to greet them placing your hand on your heart, using the ‘peace upon sign’ instead of shaking hands.

Useful links and further information

Appendix 1

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Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit our page on understanding our customers.

- In the GCC, VisitBritain focuses on two audience segments among the international travellers:
  - **Buzzseekers**
  - **Culture Buffs**

Segments (& global attributes)	**Global market share**	**Market share in GCC**
Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	22%
Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	20%
Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	6%
Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	24%
Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	28%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about the GCC or other inbound markets browse our:

Markets & segments

Inbound research & insights

Inbound COVID-19 sentiment tracker

Or contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- UK Expats in the UAE
- Luxury travellers from the USA, China, and the GCC
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

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Inbound COVID-19 sentiment tracker

Or contact us directly
(Email: research@visitbritain.org)

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the June 2021 update of the 'Global Travel Service' databank.
- **Apex** data was last updated with September 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, July 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July/August 2021 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2006 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Individual inbound market overviews

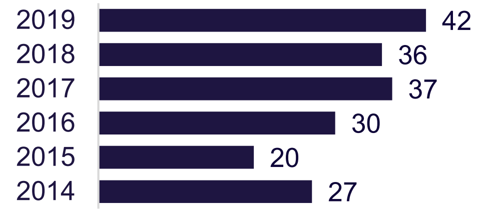
Appendix 2

©VisitBritain/Raymond Carruthers

Market overview: Bahrain

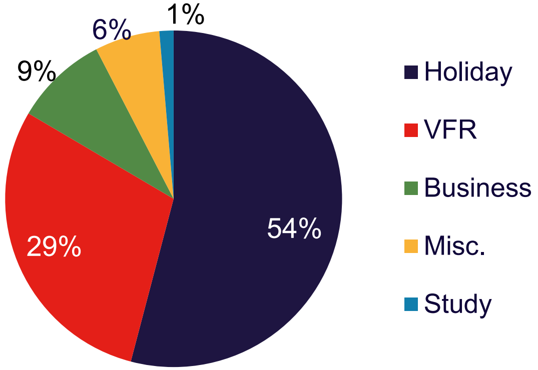
Key statistics (2019)

Visits (000s)



Spend (£m)

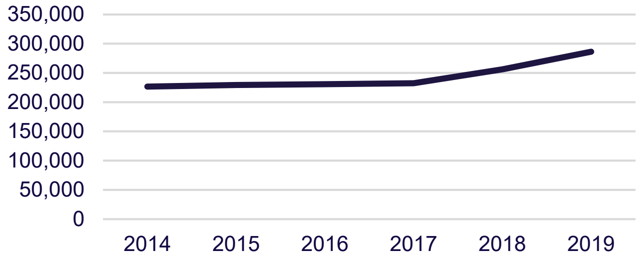
Journey purpose (% visits, 2017-2019)



Note: please read the pie chart clockwise

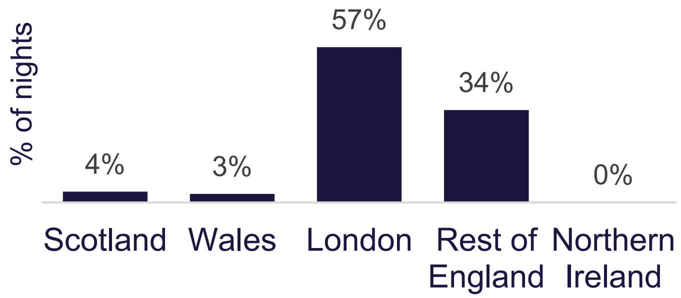
Connectivity (2019)

Departing seats



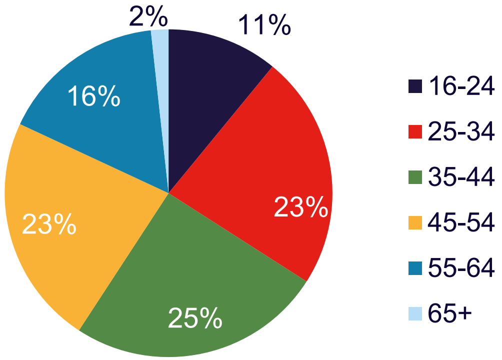
In 2019	
Departure airport	Bahrain International
Arrival airport	London Heathrow

Regional spread (2017-2019)



Visitor profile (2019)

Visitors' age (% visits)



Note: please read the pie chart clockwise

Visitors' nationality (% visits)

Markets	Visitors' nationality %
Bahraini	68%
Other GCC	0%
British	15%
Other nationalities	17%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only), *seasonal flights are not represented

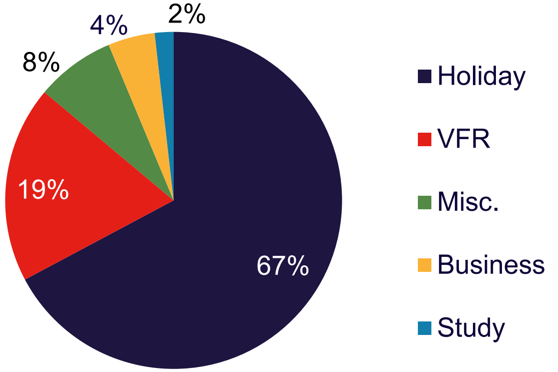
Market overview: Kuwait

Key statistics (2019)

Visits (000s)

Spend (£m)

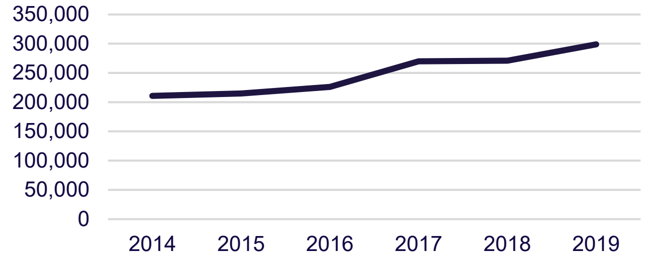
Journey purpose (% visits, 2017-2019)



Note: please read the pie chart clockwise

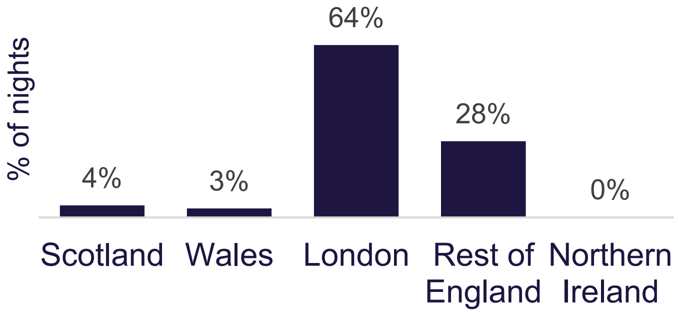
Connectivity (2019)

Departing seats



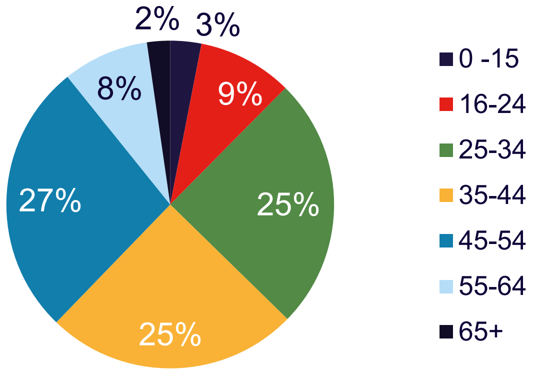
In 2019	
Departure airport	Kuwait International
Arrival airports	London Heathrow London Gatwick

Regional spread (2017-2019)



Visitor profile (2019)

Visitors' age (% visits)



Visitors' nationality (% visits)

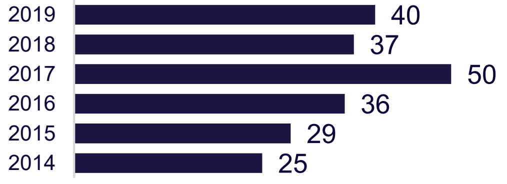
Markets	Visitors' nationality %
Kuwaiti	90%
Other GCC	0%
British	2%
Other nationalities	8%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only), *seasonal flights are not represented

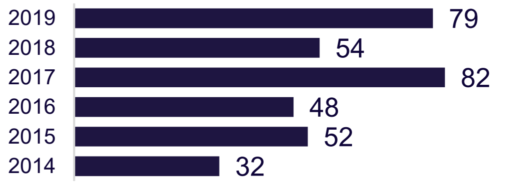
Market overview: Oman

Key statistics (2019)

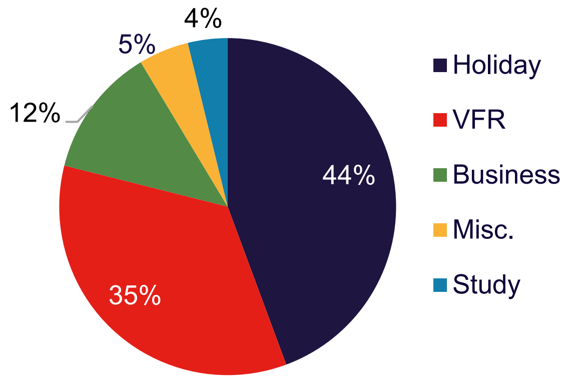
Visits (000s)



Spend (£m)



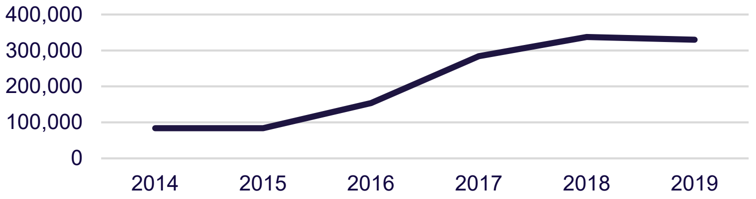
Journey purpose (% visits, 2017-2019)



Note: please read the pie chart clockwise

Connectivity (2019)

Departing seats

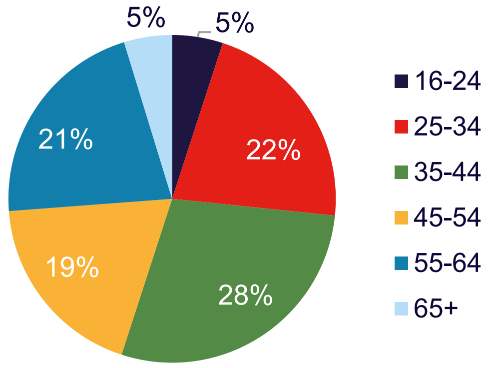


In 2019	
Departure airport	Muscat - Seeb
Arrival airports	Birmingham International East Midlands London Gatwick London Heathrow Manchester International

Regional spread (2017-2019)

Visitor profile (2019)

Visitors' age (% visits)



Note: please read the pie chart clockwise

Visitors' nationality (% visits)

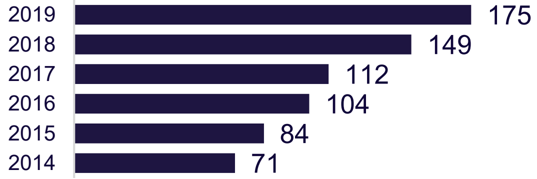
Markets	Visitors' nationality %
Omani	63%
Other GCC	3%
British	19%
Other nationalities	15%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only), *seasonal flights are not represented

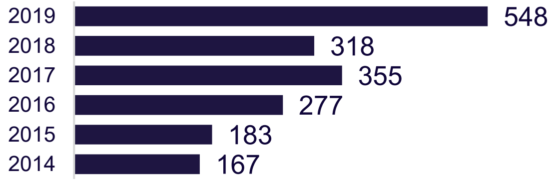
Market overview: Qatar

Key statistics (2019)

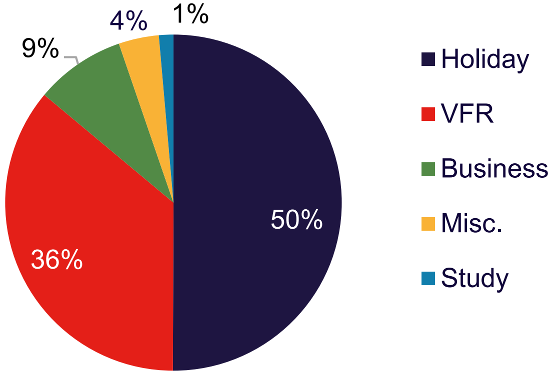
Visits (000s)



Spend (£m)



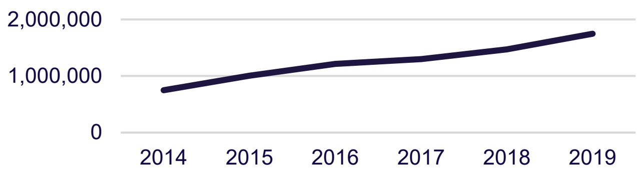
Journey purpose (% visits, 2017-2019)



Note: please read the pie chart clockwise

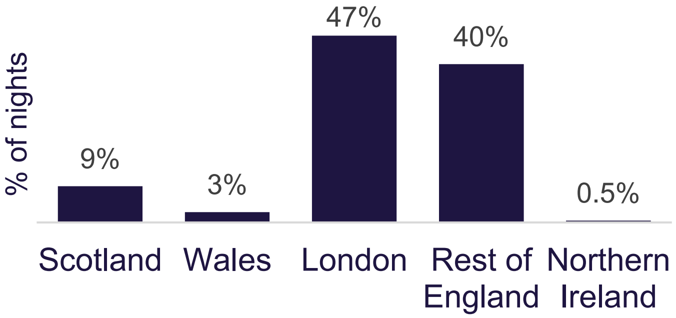
Connectivity (2019)

Departing seats



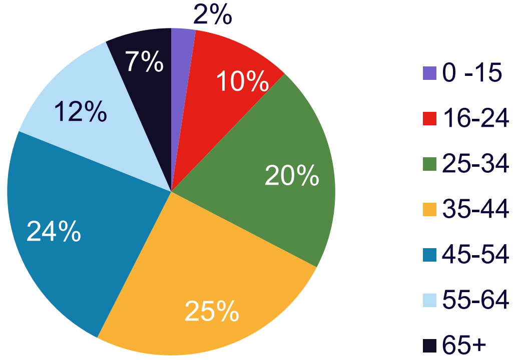
In 2019	
Departure airport	Hamad International
Arrival airports	Birmingham International Cardiff Edinburgh London Gatwick London Heathrow Manchester International

Regional spread (2017-2019)



Visitor profile (2019)

Visitors' age (% visits)



Note: please read the pie chart clockwise

Visitors' nationality (% visits)

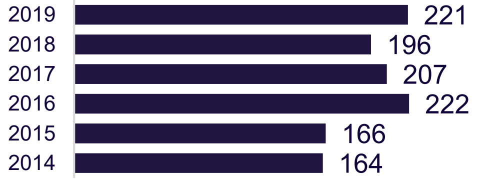
Markets	Visitors' nationality %
Qatari	59%
Other GCC	2%
British	28%
Other nationalities	11%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only), *seasonal flights are not represented

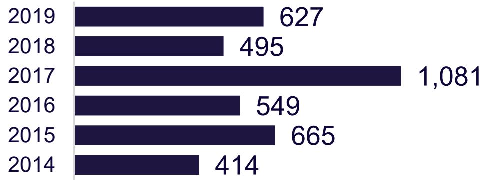
Market overview: Saudi Arabia

Key statistics (2019)

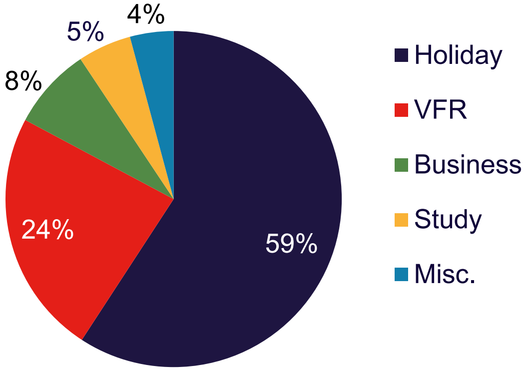
Visits (000s)



Spend (£m)



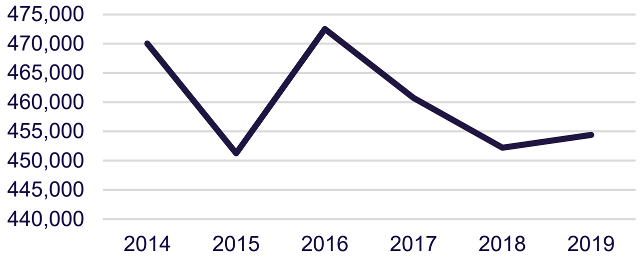
Journey purpose (% visits, 2017-2019)



Note: please read the pie chart clockwise

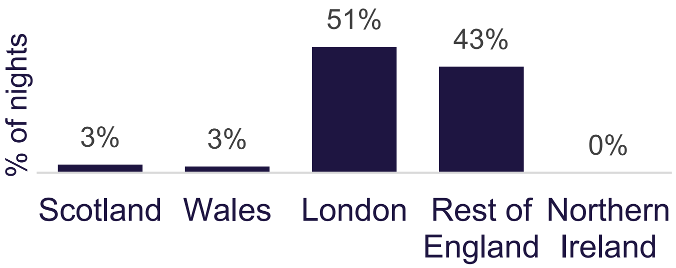
Connectivity (2019)

Departing seats



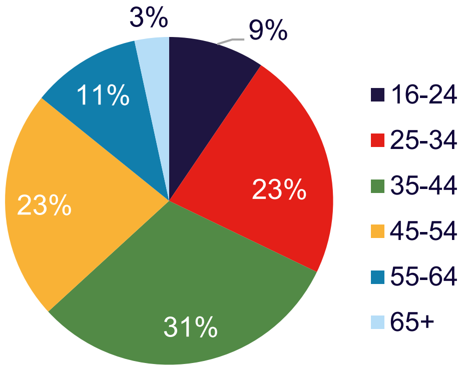
In 2019	
Departure airports	Jeddah Medina Riyadh
Arrival airport	London Heathrow Manchester International

Regional spread (2017-2019)



Visitor profile (2019)

Visitors' age (% visits)



Note: please read the pie chart clockwise

Visitors' nationality (% visits)

Markets	Visitors' nationality %
Saudi	85%
Other GCC	0.2%
British	7%
Other nationalities	7%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only), *seasonal flights are not represented

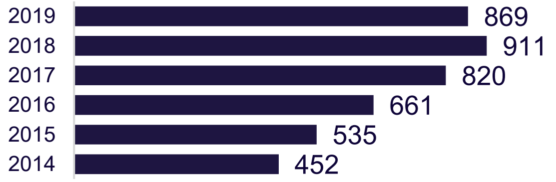
VisitBritain VisitEngland

Market overview: United Arab Emirates

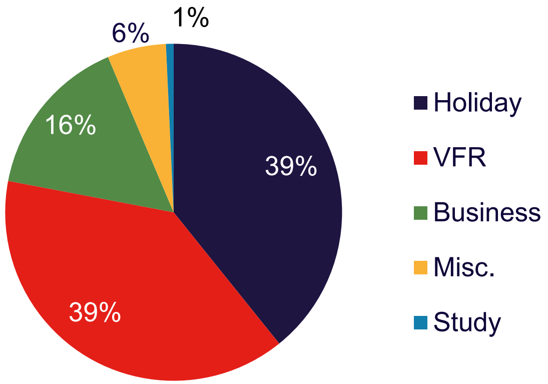
Key statistics (2019)

Visits (000s)

Spend (£m)



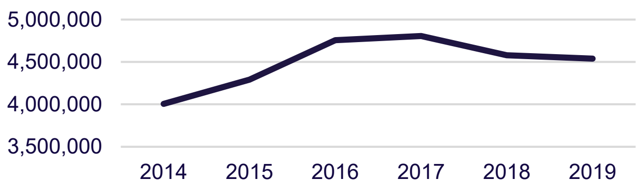
Journey purpose (% visits, 2017-2019)



Note: please read the pie chart clockwise

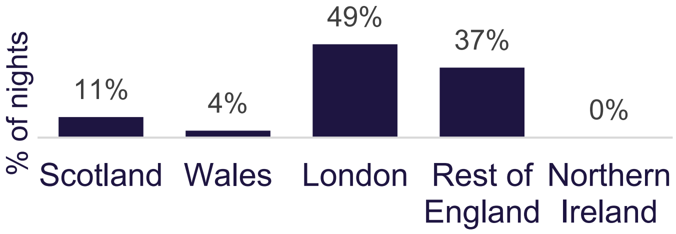
Connectivity (2019)

Departing seats



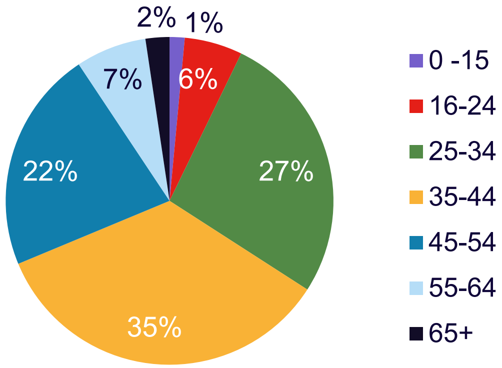
In 2019	
Departure airports	Abu Dhabi International Al Maktoum International Dubai
Arrival airports	London Heathrow Manchester International Birmingham International London Gatwick Edinburgh Glasgow International London Stansted Newcastle

Regional spread (2017-2019)



Visitor profile (2019)

Visitors' age (% visits)



Note: please read the pie chart clockwise

Visitors' nationality (% visits)

Markets	Visitors' nationality %
Emirati	37%
Other GCC	0.5%
British	31%
Other nationalities	31%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only), *seasonal flights are not represented

Market and Trade Profile: GCC

September 2021

Destination Bristol ©Gary Newman