

# VisitBritain GCC

## Tatiana Khoreshok

Country Manager - GCC

[Tatiana.Khoreshok@visitbritain.org](mailto:Tatiana.Khoreshok@visitbritain.org)



## George Christakis

Senior Manager, Travel Trade

[George.Christakis@visitbritain.org](mailto:George.Christakis@visitbritain.org)



# VisitBritain Team - GCC



**Carol Maddison**  
Deputy Director  
APMEA CNEA



**Tatiana Khoreshok**  
Country Manager,  
GCC



**George Christakis**  
Snr Manager  
Travel Trade



Travel Trade and  
Communications Exec.  
(recruiting)



Travel Trade Manager  
KSA  
(currently vacant)



**Mirna Tamimi**  
Communications  
Manager, GCC

The Gulf Cooperation Council (GCC) is made-up of six countries: **Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (UAE)**



**Saudi Arabia**

Size of the prize: 36.4M

Target Audience: Nationals (60%)  
+ affluent expats

Segments: Affluent Families

63% of Saudis under 30 years old



**UAE**

Size of the prize: 9.4 M

Target audience: Nationals (12%) + Expats

Segments: Affluent Arab Families

Arab Younger Gen (21-35yo)

Expats with high level of income



**Kuwait**

Size of the prize: 4.2M

Target Audience: Nationals

Segments: Affluent Families

Younger Gen (21-35yo)



**Qatar**

Size of the prize: 2.8M

Target Audience: Nationals

Segments: Affluent Families

Younger Gen (21-35yo)

**NOTE:** Although a smaller market, FIFA World Cup has elevated our engagement in Qatar to capitalise the major event legacy as well as some striking growth levels.

# Similarities and Differences – Priority Markets



**Saudi Arabia**



**UAE**

- Most conservative within GCC
- Recent social reforms have allowed women basic rights.
- Huge changes in recent years including reopening of cinemas after 35 years, hosting the F1, and attracting major entertainment artists for concerts.
- Alcohol and gambling are still banned.
- Most cosmopolitan country within GCC
- UAE ranked first amongst Gulf countries and sixth globally out of 59 destinations in the list of best countries to live and work
- Tax- free
- Alcohol available
- Host to big entertainment events and music concerts.
- Gambling is still illegal.

## **Unofficial reality:**

- The GCC do enjoy food (halal not essential) and beverages (alcohol, whisky tours, wine tasting) when they travel.
  - Many GCC females prefer to dress in Westernised fashion when in the UK.
    - GCC often frequent casinos and gamble when travelling
  - Male dominated markets but travel based decisions tend to sit with females.

***BUT....we cannot promote this in the market!***

# GCC Economical and Political context

- The Gulf Cooperation Council (GCC) region is estimated to **grow by 1%** in 2023 before picking up again to 3.6 and 3.7 % in 2024 and 2025, respectively
- **The GCC is a priority market for HMG.** In October 2021, the UK launched a consultation on a trade agreement with the GCC, and negotiations began in the summer of 2022.
- **The UK enhanced its relationships with Qatar**, announcing two significant agreements to boost trade and investment.
- **Saudi Arabia** is currently undergoing massive development with major changes working on a number of giga and mega projects including Neom, Red Sea and Diriyah Historic district in Riyadh
- **Israel - Palestine conflict** is affecting the region
- **The UAE** is an enclave of peace and neutrality amongst many politically unstable countries

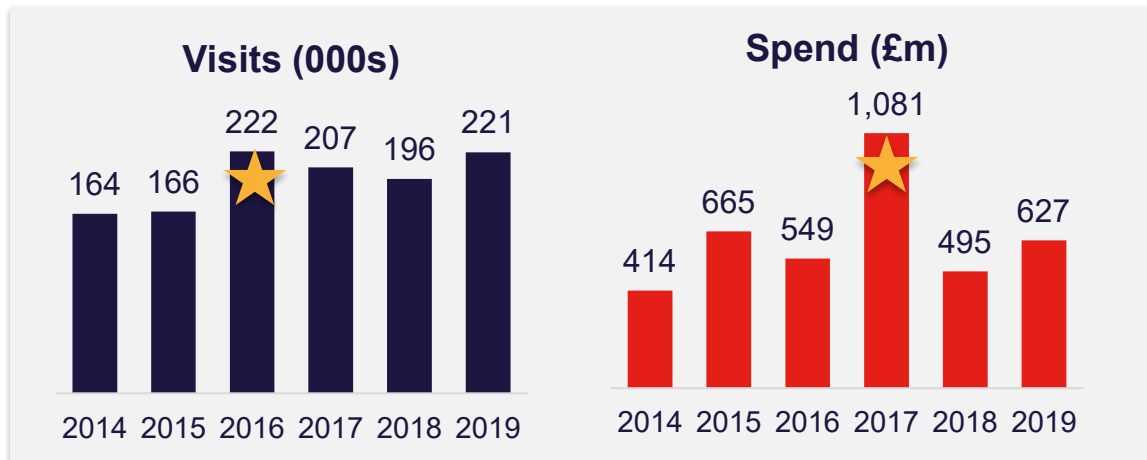
# Economical and Social context

- **Saudi Arabia and the UAE** received a record-breaking **\$40 billion** foreign direct investment in 2022, demonstrating a **58%** increase from the previous year.
- **HNWI financial growth** and population continued to **grow** in Middle East while it declined in Europe, APAC, and North America in 2022.
- Both Saudi Arabia and UAE have programmes of **economic development** diversifying its economies from oil into tourism, renewable energy and technology. Regional travel becomes very competitive
- UAE seeks to launch human **space missions** every three to five years, including a woman astronaut going into space next year.
- **The increasing participation of women** in Saudi Arabia's workforce is expected to boost the country's economy by \$39 billion, or 3.5 per cent, by 2032
- **Key events:** Expo-2030, Saudi World Cup 2034

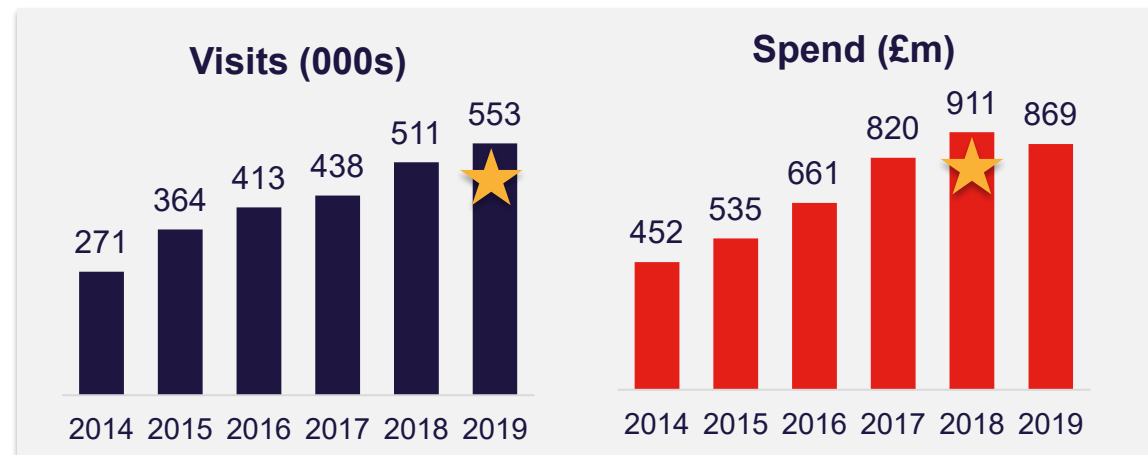


# IPS learnings pre-COVID | A reminder

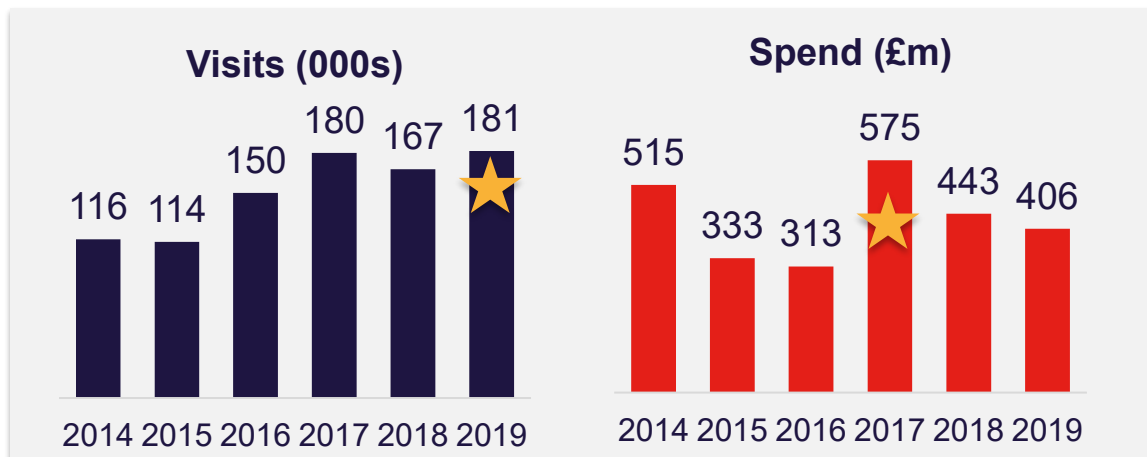
## SAUDI ARABIA



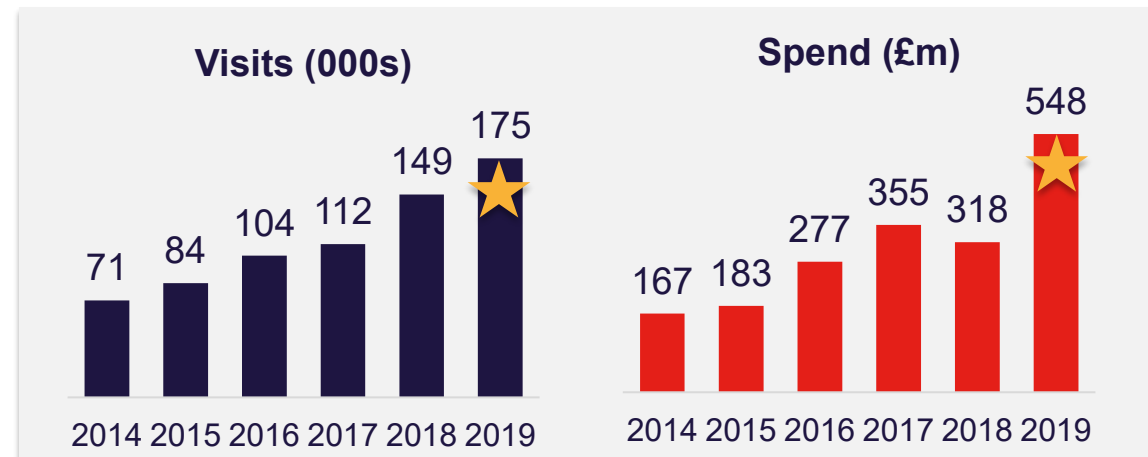
## UNITED ARAB EMIRATES



## KUWAIT



## QATAR



# Market Strategy for VisitBritain

- **UAE and Saudi Arabia** are the focus of the Visit Britain GCC strategy.
- Whilst London remains the popular British destination, with direct flights to **Manchester, Newcastle, Birmingham, Edinburgh, Cardiff and Glasgow** the opportunity is huge.
- We focus on four strategic areas: PR, travel industry engagement, PDP relationships and partnerships.
- We aim to capitalise on unique opportunities in the **GCC by engagement with experience seekers** in the GCC, via consumer marketing campaigns, educating and inspiring the trade, working with FCDO, DBT and British Council and sharing stories with media.
- We will increase **destination and product content through OTA** and meta-search partners and focus on expanding our reach of distribution to entice both repeat and new leisure visitors.





# Spill the tea on GB (Phase 2 – See Things Differently)

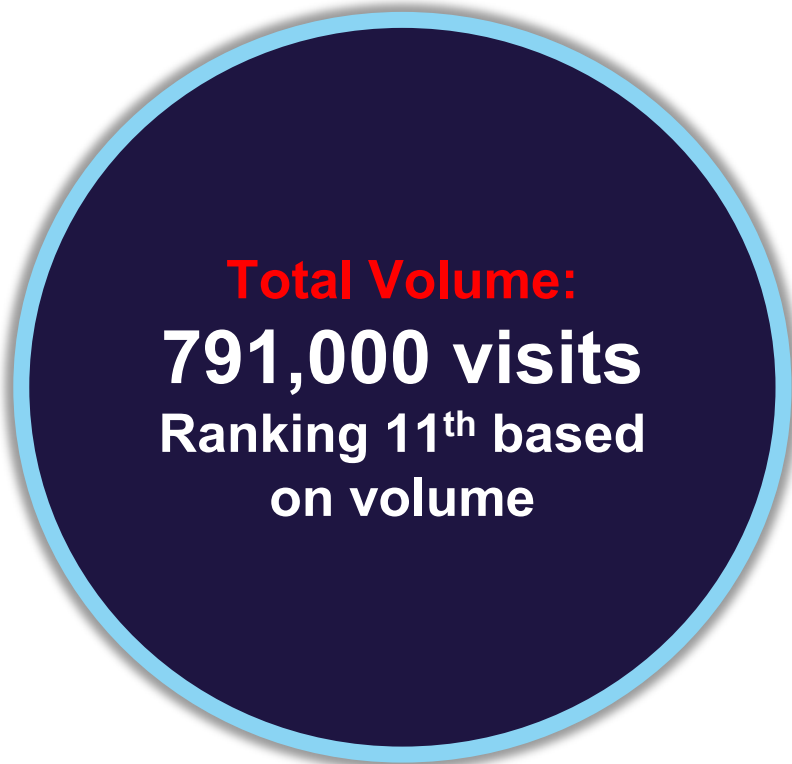




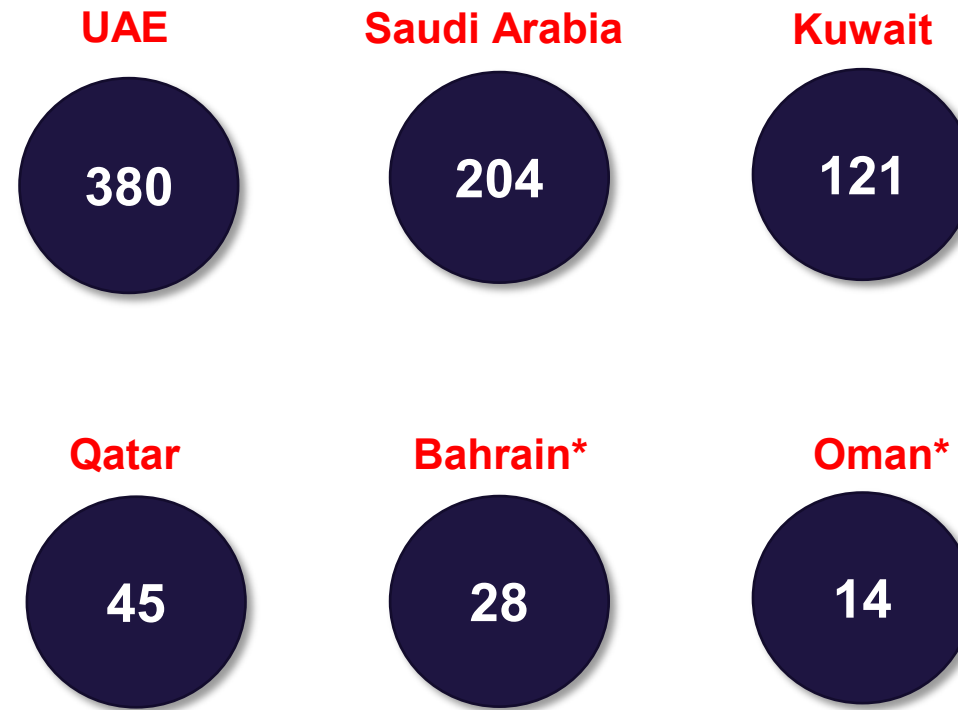
**Looking back at 2022**

# GCC remains a priority market for the UK's visitor economy

The GCC market remain a big part of the UK's inbound visits market given its contribution to the UK travel economy. In terms of volume of visits, GCC recorded 791,000 visits in 2022, reflecting 65% of pre-pandemic levels.



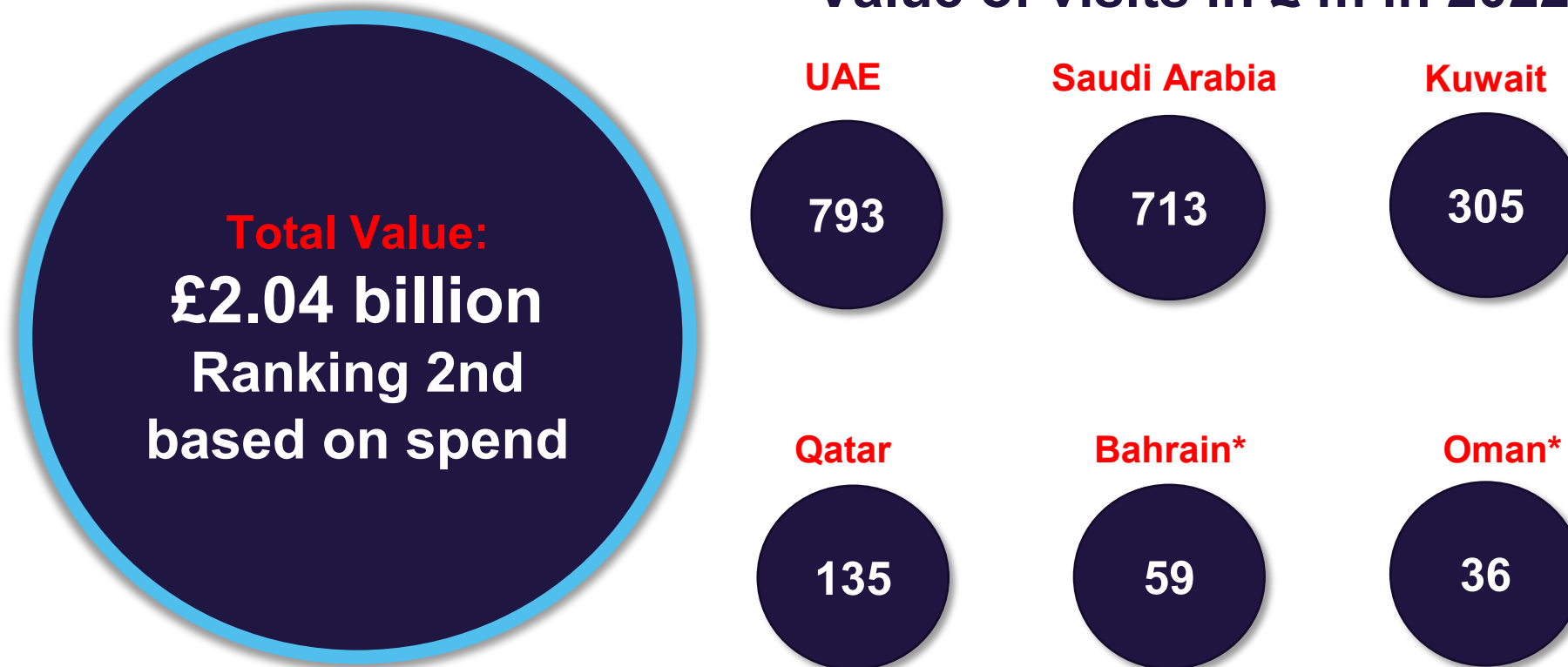
## Volume of visits in 000s in 2022:



# GCC market ranks second largest inbound market by value

GCC visitors expended £2.04 billion in 2022 during their visits to the UK. GCC markets are some of the leading high spenders (especially on holiday visits), evident in their rank as second biggest inbound market by value (total spend).

## Value of visits in £'m in 2022:



Source: International Passenger Survey by ONS, 2022 and 2019. All spend is stated in nominal terms.

\*Small base, please treat as indicative.

# Visits and spends are recovering but still below 2019 level

Visits from GCC market combined reached 65% of 2019 volume while spending recovered faster to 78% of pre-pandemic levels. All GCC markets, individually, are set to catch up with pre-pandemic level for volume of visits and visitor spending by 2025.

Share of 2019 **volume** in 2022:

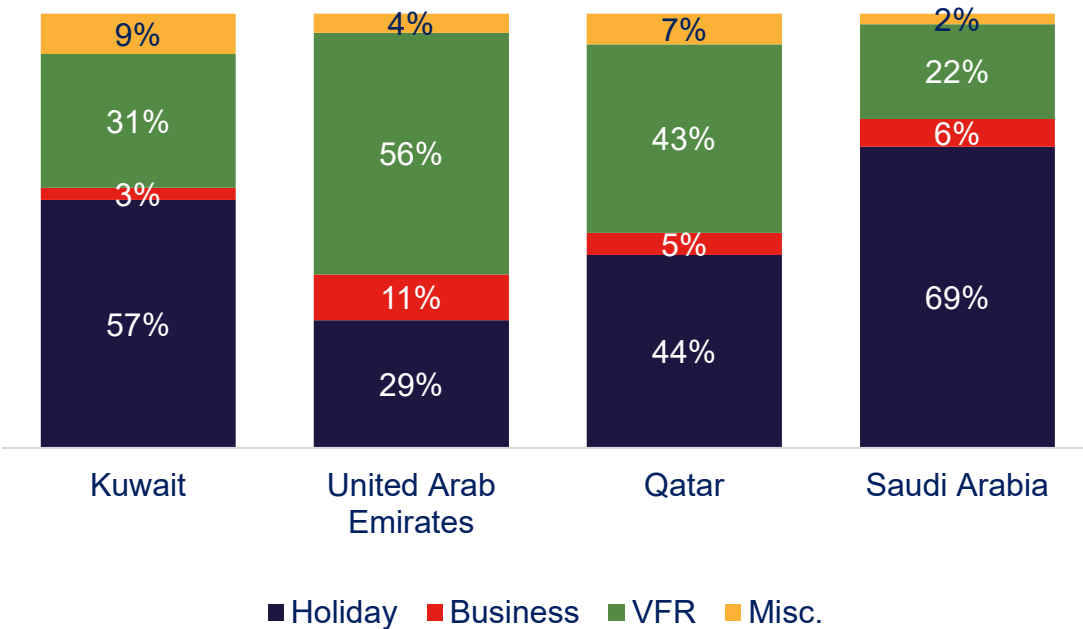
|                        |                     |                   |                            |                     |                      |
|------------------------|---------------------|-------------------|----------------------------|---------------------|----------------------|
| <b>68%</b><br>Bahrain* | <b>35%</b><br>Oman* | <b>69%</b><br>UAE | <b>92%</b><br>Saudi Arabia | <b>26%</b><br>Qatar | <b>67%</b><br>Kuwait |
|------------------------|---------------------|-------------------|----------------------------|---------------------|----------------------|

Share of 2019 **value** in 2022:

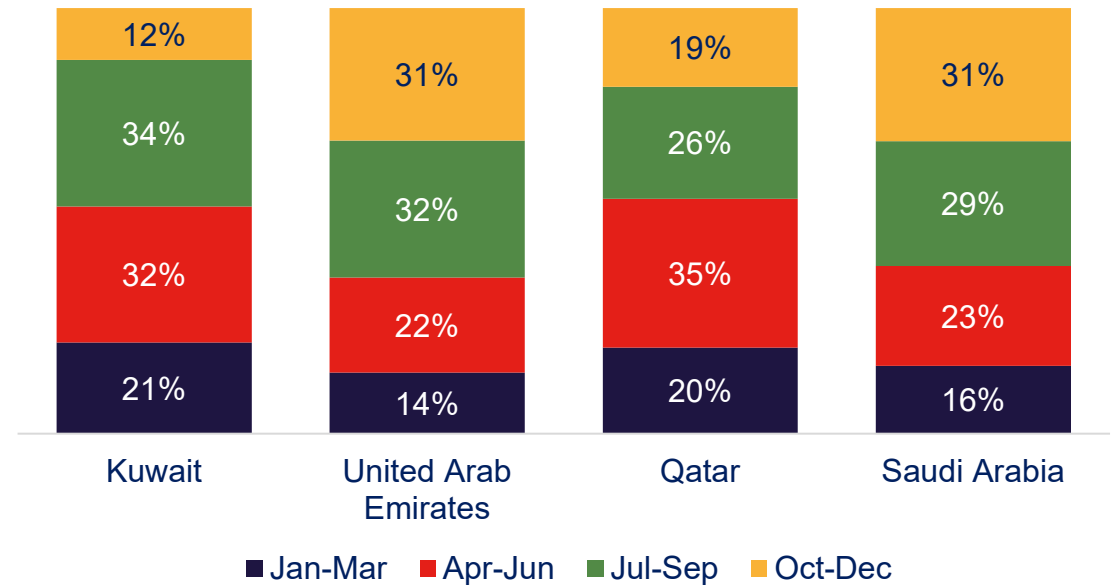
|                        |                     |                   |                             |                     |                      |
|------------------------|---------------------|-------------------|-----------------------------|---------------------|----------------------|
| <b>78%</b><br>Bahrain* | <b>46%</b><br>Oman* | <b>91%</b><br>UAE | <b>114%</b><br>Saudi Arabia | <b>25%</b><br>Qatar | <b>75%</b><br>Kuwait |
|------------------------|---------------------|-------------------|-----------------------------|---------------------|----------------------|

# 44% of GCC visitors are in the UK for holiday purpose, followed by 41% visiting family and friends

Inbound visits for GCC markets by purpose (2022)



Inbound visits for GCC markets by season (2022)



Source: International Passenger Survey by ONS, 2022; VFR stands for those visits made to see family and friends who reside in the UK.



# Regional distribution of GCC visits

GCC visitors are very London-loyal, but the share of visitor nights spent in other areas of England outside the capital has increased compared to prior to the pandemic, with the North country benefitting the most.

| Based on visitor nights | 2019 | 2022 |
|-------------------------|------|------|
| London                  | 46%  | 45%  |
| Rest of England         | 41%  | 47%  |
| North country           | 12%  | 25%  |
| Central England         | 10%  | 9%   |
| Southern England        | 18%  | 13%  |
| Scotland                | 10%  | 5%   |
| Wales*                  | 3%   | 3%   |

Source: International Passenger Survey by ONS, 2019 and 2022. \*Small base, please treat as indicative.

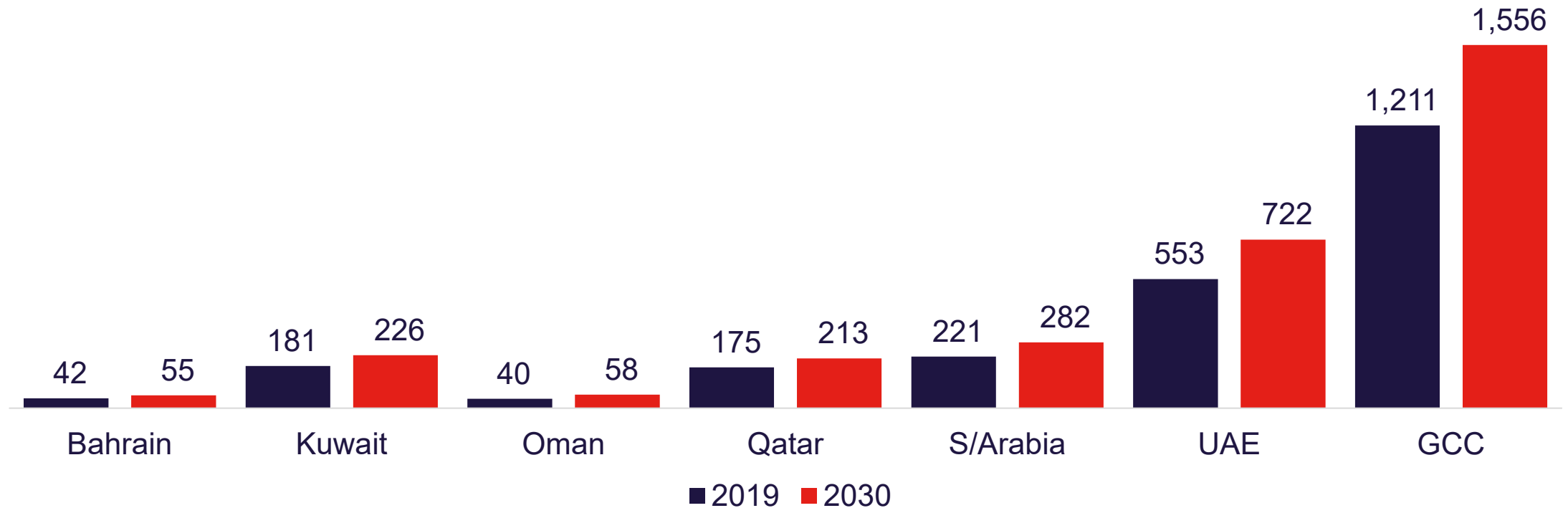
# Looking ahead: 2023 so far and beyond





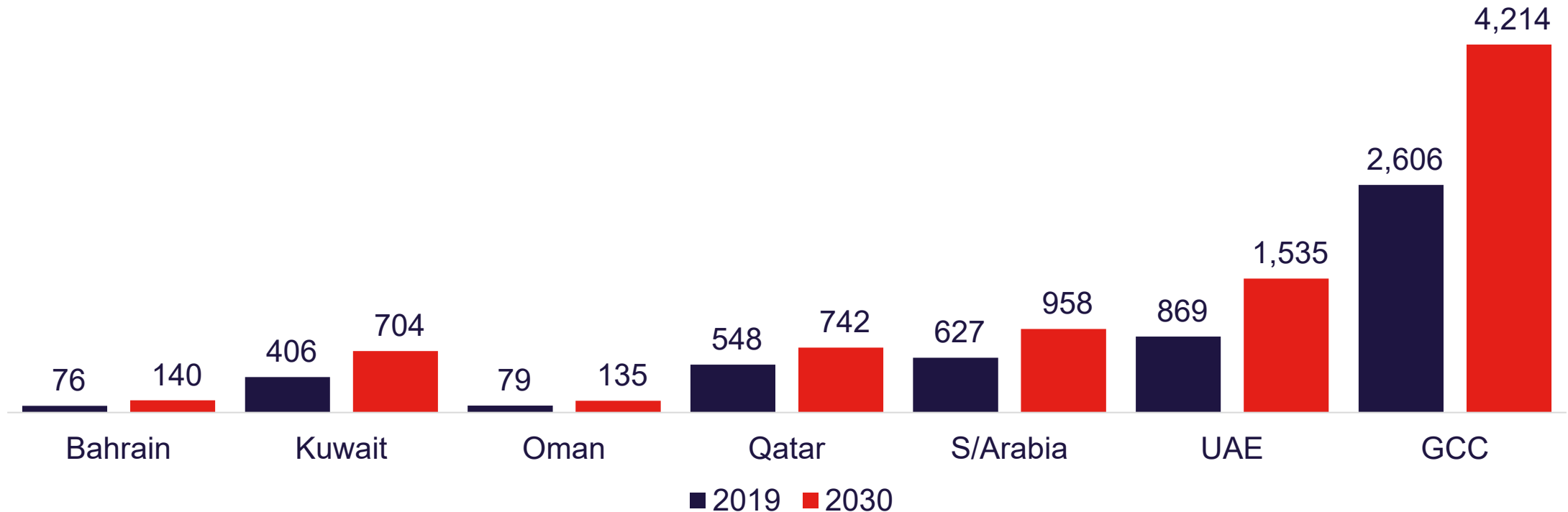
# Growth potential of the GCC markets by 2030

Volume of visits by 2030 by GCC markets ('000)



# Growth potential of the GCC markets by 2030

Value of visits by 2030 by GCC markets ( £ 'million)



Source: International Passenger Survey by ONS 2019. VisitBritain/Oxford Economics forecast as at December 2023. All spend is stated in nominal terms.

# Opportunities and Challenges

## Opportunities

- Leverage UK's culture, history, and heritage to drive more GCC visits.
- Focus on **retail and dining experiences**
- Supporting GCC travellers in their intent to **make sustainable choices** also on holidays.
- Leveraging ETA
- Improved **seat capacity** from Saudi Arabia to bolster inbound visits from GCC.
- Given that GCC holiday travellers are **high spenders**, building on the **growth potential of the GCC markets**

## Challenges

- **Rising inflationary** pressure could tame the desire to visit the UK in the coming months.
- Impact of **Tax-Free shopping** discontinuation
- Limited **luxury** accommodation offering beyond major gateway cities
- **Last-minute** booking behaviour
- Little awareness and familiarity of **destinations beyond London**

# Trade Update & Activities – GCC

## George Christakis





# Perceptions, customer journey and trends

# Top perception by GCC countries

## Saudi Arabia

### Perceptions of Britain\*\* (2022)

The UK ranks within the top 15 out of 60 nations for:



| Ranking | Top perceptions about the UK                             | Saudi Arabia | UAE | Global average |
|---------|--|--------------|-----|----------------|
| 1       | Is a place where I can explore history and heritage      | 55%          | 52% | 57%            |
| 2       | Has an interesting mix of cultures from around the world | 55%          | 50% | 51%            |
| 3       | I can roam around visiting many types of places          | 54%          | 47% | 56%            |
| 4       | There are vibrant towns and cities to explore            | 53%          | 50% | 57%            |
| 5       | Is a mixture of old and new                              | 53%          | 54% | 55%            |
| 6       | It's easy to get around once there                       | 51%          | 48% | 53%            |
| 7       | Has a thriving arts and contemporary culture scene       | 50%          | 47% | 47%            |
| 8       | There is beautiful coast and countryside to explore      | 50%          | 49% | 47%            |
| 9       | Is inclusive and accessible for visitors like me         | 50%          | 49% | 50%            |
| 10      | Offers a lot of different experiences in one destination | 49%          | 48% | 53%            |

## UAE

### Perceptions of Britain\*\*\* (2022)

Top associations with Britain:



Sources: VisitBritain/Kubi Kalloo June 2022

# Top destination by GCC countries



| Top Destination for holiday/short stay | Saudi Arabia | UAE | Global average |
|--|--------------|-----|----------------|
| Britain                                | 46%          | 46% | 46%            |
| USA                                    | 36%          | 32% | 31%            |
| France                                 | 30%          | 33% | 40%            |
| Italy                                  | 27%          | 32% | 39%            |
| Switzerland                            | 23%          | 27% | 22%            |
| Germany                                | 22%          | 27% | 35%            |
| Spain                                  | 21%          | 21% | 37%            |
| Australia                              | 13%          | 20% | 29%            |
| Austria                                | 12%          | 15% | 22%            |
| Ireland                                | 6%           | 13% | 12%            |

## Saudi Arabia

Likelihood to combine Britain with other destinations



Travel only to Britain



Combine a trip to Britain and other places in Europe



Undecided

## UAE

Likelihood to combine Britain with other destinations



Travel only to Britain



Combine a trip to Britain and other places in Europe



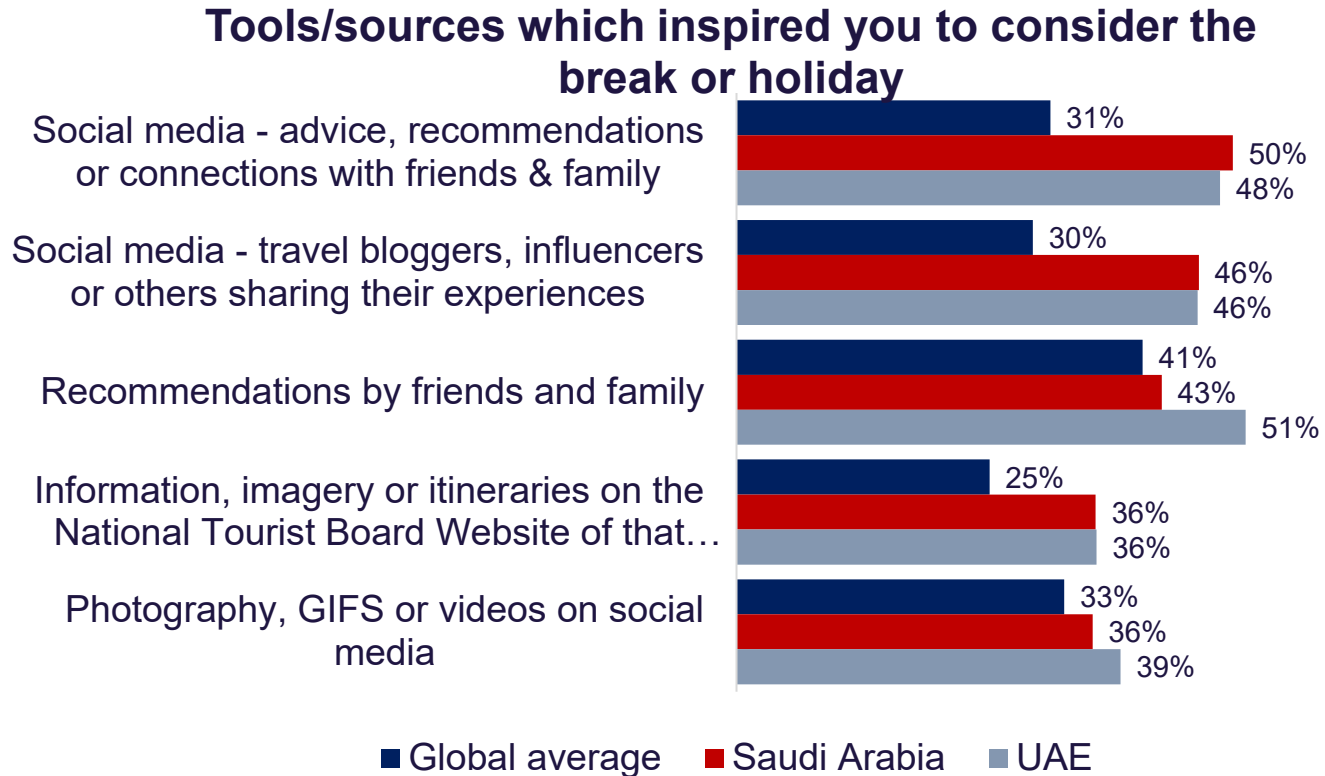
Undecided

# Interested activities during holiday by GCC countries

| Interested activities during holiday               | Saudi Arabia | UAE | Global average |
|--|--------------|-----|----------------|
| Experience coastal places and scenery              | 80%          | 73% | 69%            |
| Experience rural life and scenery                  | 80%          | 70% | 58%            |
| Visit famous/iconic tourist attractions and places | 80%          | 76% | 65%            |
| Visit parks and gardens                            | 79%          | 69% | 57%            |
| Enjoy outdoor walks, hiking or cycling             | 77%          | 69% | 55%            |
| Visit famous shops or shopping streets/centres     | 77%          | 69% | 53%            |
| Explore local food and beverage specialities       | 77%          | 72% | 69%            |
| Visit zoos, aquariums, and wildlife parks          | 74%          | 65% | 49%            |
| Experience city life                               | 74%          | 67% | 56%            |
| Enjoy fine dining experiences                      | 74%          | 66% | 52%            |



# Tools/sources which inspired you to consider the break or holiday



Saudi Arabia



UAE



# Travel Trade Snapshot

- **Fragmented landscape** - over 6,000 agents and tour operators, with the UAE holding the main concentration of licensed agents.
- Most are **relatively small** and only operate in the city/region where they're based.
- Larger companies tend to be part of **integrated business groups** servicing multiple travel and transport sectors.
- Preference for **family travel**, with a high emphasis on individual **tailored arrangements**. Airline/holiday packages are gaining momentum.
- Consumers can be easily swayed on choosing holiday provider by a marginal **price difference**.
- On a smaller scale, many leading travel agents offer packages throughout the year with special **short-break promotions** for Eid Holidays, National Day holidays and other long weekends.
- GCC travellers show preference for Asia and Turkey for short breaks, and **UK/Europe for longer periods** (7nights+).






# Attracting the GCC Market

## Opportunities:

- GCC travel motivators are changing – wanting more **diverse and enriching experiences**
- **Air capacity and frequency** from GCC is strong to London and regional gateways
- **DMCs** are very important (offering complete package) but also direct bookings with value-ads
- **Electronic Travel Authorisation (ETA)**
- Be conscious of **cultural sensitivities** in product experiences e.g. alcohol and halal menus
- **Social Media** and peer-to-peer platforms are key
- Luxury & **VIP experiences**
- Familiarise yourself with **GCC Holiday Calendar**
- **Arabic translations** or Arabic speaking influencers speaking in sales/marketing initiatives is helpful
- Engage in events and road shows across the region e.g. **Arabian Travel Market**
- Invest time to **build relationships** and loyalty



# Electronic Travel Authorisation (ETA)

| BENEFITS            | ETA   | EVW   | STANDARD VISIT VISA   |
|---------------------|---|---|---|
| Cost                | £10   | £30   | £115  |
| Duration            | Valid for 2 years or until passport expires, whichever is sooner                  | Per single trip   | 6 month visa  |
| Multiple Trips      |  |  |  |
| Application Process | Simple App<br>Intuitive<br>Pre-populated using biometrics                         | Apply on Gov.UK   | In person visit to VAC required.<br>Give Passport to UK                             |
| Status              | Non-Visa Nationals  | Visa Nationals  | Visa Nationals  |

# Key Partners

cozmo  
travel

سيرا  
SEERA

Alfaris Travel

ALGHANIM  
سفریات الغانم  
Alghanim Travel

ريجنسي للسياحة والسفرات والسياحة  
REGENCY TRAVEL & TOURS

almatar

فرسان للسفر  
FURSAN TRAVEL

Emirates  
Holidays

wego

NIRVANA  
TRAVEL & TOURISM L.L.C.

Al Rostamani  
TRAVEL AND HOLIDAYS

dnata  
travel

الريس للسياحة و العطلات  
AL RAIS TOURS & HOLIDAYS



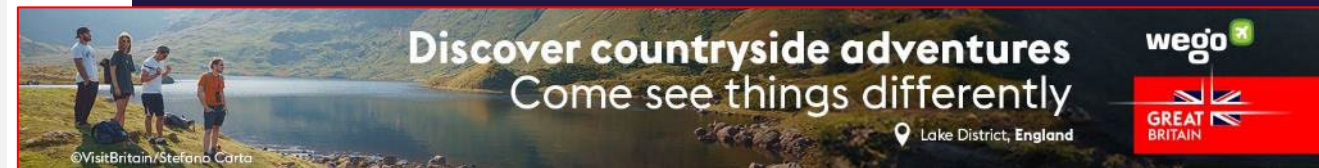
VISIT  
BRITAIN

# Key B2B/B2B2C Activities

- Wego – vibrant cities, wild coastlines, countryside adventures (Dec 23 – May 24)
- Winter Fest Abu Dhabi and Taste of Dubai
- Etihad Airways VIP Famil (Oct 23)
- Showcase Britain + Showcase Britain GCC GWW Fam (Jan 2024)
- Dnata Destination Development Campaign
- Dnata trade fam (Feb 2024)
- GCC ETA roll-out
- Trade Media activities
- GREAT Futures (May 2024)
- Arabian Travel Market (May 2024)

## Ongoing:

- Trade and PR comms (newsletters and media alerts)
- Trade Events, Key Account Management & Training



# Opportunities

- Arabian Travel Market
- Destination Middle East & Asia (Nov 24)
- Famil visits
- Showcase Britain 2025
- Content – travel trade and media comms
- GREAT Futures legacy programme



A scenic landscape photograph showing four hikers standing on a rocky mountain peak, looking out over a vast valley. The hikers are seen from behind, wearing colorful jackets and backpacks. The valley below is filled with rolling hills and a winding river, all bathed in the warm, golden light of a sunset. The sky is a mix of soft pinks, oranges, and blues, with a few wispy clouds and a bright contrail streaking across it.

Thank you

