

GCC Market Snapshot

GCC MARKET OVERVIEW

COUNTRY	POPULATION	ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	MAJOR CITIES	LANGUAGE(S)	CURRENCY
United Arab Emirates	9.4 million	4%	Dubai, Abu Dhabi	Arabic, English	AED
Kingdom of Saudi Arabia	29.4 million	8%	Riyadh, Jeddah, Mecca, Medina, Ad Dammam	Arabic	SAR
Bahrain	1.3 million	4%	Manama, Al Muharraq	Arabic, English, Farsi, Urdu	BHD
Kuwait	3.8 million	3%	Kuwait city	Arabic, English	KWD
Qatar	2.1 million	8%	Doha	Arabic, English	QAR
Oman	3.6 million	5%	Muscat	Arabic, English, Baluchi, Urdu, Indian dialects	OMR



TRAVELLER PROFILE

GCC OUTBOUND TRAVEL

YEAR	2013	2014	2015
NUMBERS	37 million	37 million	38 million
YEAR ON YEAR GROWTH %	51%	0%	3%
VISITOR NUMBERS TO EUROPE	683,900	615,000	723,700
YEAR ON YEAR GROWTH %	29%	(minus) 10%	18%

Purpose of Travel (% share of visits)



Top 5 Destinations to Visit

WORLD WIDE	EUROPE
1. Saudi Arabia	1. United Kingdom
2. Lebanon	2. Germany
3. Oman	3. Switzerland
4. UK	4. Italy
5. Germany	5. Austria

Peak Travel Periods

MONTH	AVERAGE LENGTH OF HOLIDAY
July and August	21 to 42 days
Eid Al Adha Holidays	4 to 10 days

GCC travellers typically travel during the summer months (July & August) due to the extreme heat and during school holidays and Eid Al Fitr al-Adra, holidays based around Ramadan. The average number of leisure trips for UAE residents is approx 3 per year which includes at least one long haul family holiday of 10-15 days.

Booking Lead Times

One month or less



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OUTBOUND TRAVEL TO IRELAND

Tourism Ireland best estimates

MARKET	2013	YoY increase	2014	YoY increase	2015	YoY increase
Middle East	45,000-55,000	16%	50,000-60,000	10%	60,000-70,000	18%

TOURISM IRELAND'S TARGET MARKETS / SEGMENTS

NAME	AGE	PROFILE	% OF TOTAL POPULATION	HOW DO THEY BOOK THEIR HOLIDAY?	ACCOMMODATION TYPE WHILE ON HOLIDAYS	HOW DO THEY LIKE TO TRAVEL WITHIN IRELAND?	KEY REQUIREMENTS FROM IRISH INDUSTRY FOR THIS SEGMENT
UAE Nationals	25+	UAE nationals, couples and families. High spending tourists with a preference for luxury travel.	20%	Strong reliance on traditional travel agents	5 star luxury properties	Self-drive Chauffeur service	<ul style="list-style-type: none"> - Provision of halal food - Privacy is important - Strong emphasis on family activities - Large family & adjoining rooms required - Alcohol should not be promoted - Culture & heritage
Western expats	30+	Western expats residing in UAE, English speaking couples and families who already have a cultural awareness of Ireland.	40%	Increasingly moving towards online booking however, local travel agent influence is still important	3-5 star properties	Self-drive Coach tours	<ul style="list-style-type: none"> - Link up with wider tourism festivals - Strong emphasis on family activities - Good value for money - Touring routes

WEEKLY FLIGHTS & SEATS FROM KEY CITIES IN GCC TO IRELAND

DEPARTURE CITY	NO. OF FLIGHTS PER WEEK	NO. OF SEATS	DIRECT AIRLINES
Abu Dhabi	14 (from April 2017)	4,494	Etihad Airways
Dubai	14	5,200	Emirates

VISA REQUIREMENTS

TO REPUBLIC OF IRELAND

Nationals from Middle East Countries can visit Ireland on a UK General 'C' visa without requiring a separate Irish visa.

TO NORTHERN IRELAND

UK Visa required for GCC Nationals

VISA WAIVER APPLICABLE

Yes

IRELAND'S STRENGTHS AND OPPORTUNITIES FOR TARGET MARKET

IRELAND'S STRENGTHS

1. Visa Waiver Programme
2. 28 direct flights per week to Ireland
3. Ireland's pleasant climate
4. Strong awareness of Ireland among Western expats
5. Strong Irish presence and influential Irish expats with pivotal positions in the UAE

IRELAND'S OPPORTUNITIES

1. St Patrick's month
2. Launch of new Tourism Ireland website
3. Launch of new Ireland Specialists
4. One break, two cities: Ireland's proximity to the UK will encourage GCC nationals to travel to Ireland when visiting London during the summer months
5. Growing importance of social media in UAE

TOP 5 ATTRACTIONS

1. Horseracing/Breeding; and Golf
2. Nature & Scenery: Giant's Causeway, Cliffs of Moher, Wild Atlantic Way, Causeway Coastal Route
3. Culture & Heritage: Blarney Castle, Kilkenny Castle, Ballyfin Estate, Ashford Castle
4. City lifestyle: Afternoon tea, Titanic Belfast, Halfpenny Bridge, Luxury shopping, spa retreats
5. Festivals: St Patrick's Day, Halloween, Traditional Music

WHY GCC VISITORS CHOOSE IRELAND

1. Ireland is visa free for UAE nationals
2. Mild climate
3. Ireland's proximity to the UK
4. Cities, food, luxury accommodation and castles, shopping
5. Scenic landscape and links to Arabic culture



INFLUENCES IN THE TRAVEL JOURNEY FOR GCC MARKET

Word of mouth recommendations, social media influencers and recommendations from traditional travel agents remain popular among GCC travellers.

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ROUTES TO MARKET

TRAVEL TRADE MARKET

TRAVEL TRADE	OVERVIEW
Tour Operators / Wholesalers	10 major tour operators in the GCC with Emirates and Etihad Holidays being the largest.
Travel Agents	Traditional travel agencies are key to the GCC's travel planning process, with over 6,000 agencies across the region.
MICE	A small but growing sector
Online Travel Agents	Very few online travel agents in the market. Local travel agents are increasingly investing in online booking technology
Online direct with airlines & hotels	Popular with Western expats and becoming increasingly popular with GCC visitors

TOP 10 TRAVEL TRADE

TRAVEL TRADE

1. Emirates Holidays
2. Etihad Holidays
3. dnata
4. Kanoo Travel
5. Al Rais Travel
6. Al Tayer Travel
7. Al Rostamani
8. Abu Dhabi Travel Bureau
9. Al Futtaim Travel
10. ITL World Travel & Tourism

CURRENTLY PROGRAMME IRELAND

- Ireland FIT tours and tailor-made packages
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- No Ireland tours, available upon request
- No Ireland tours, available upon request

METASEARCH; PEER REVIEW; GDS

Holiday ME, Kayak, Musafir, Al Rostamani Travel, Travel, Tajawal

MARKETING & COMMUNICATIONS

Promotional & Marketing Opportunities

Promotional activity includes airline and tour operator consumer campaigns, sales missions, travel trade training, itinerary building, familiarisation trips to Ireland and B2B workshops, generating positive publicity for Ireland through media events, press releases and visits to Ireland and digital marketing.

Popular Social Media Platforms

Facebook, Instagram, Twitter, Whatsapp, Snapchat

Popular Search Engines

Google, Yahoo, Bing

MEDIA LANDSCAPE

TOP 5 NEWSPAPERS

- | | |
|-------------------|-------------------|
| English | Arabic |
| 1. Gulf news | 1. Al Ittihad |
| 2. The national | 2. Al Bayan |
| 3. Khaleej Times | 3. Al Khaleej |
| 4. The Gulf Today | 4. Emarat Al Youm |
| 5. 7 days | 5. Al Roeya |

TOP 5 MEDIA CHANNELS FOR TRAVEL TRADE/CONSUMERS

- | | |
|-----------------------------------|----------------------|
| English | Arabic |
| 1. Arabian Travel News | 1. Ara Magazine |
| 2. Business Traveller Middle East | 2. Zahrat Al Khaleej |
| 3. Travel Trade Gazette MENA | 3. Travel Arabia |
| 4. Travel Trade News Middle East | 4. Laha Magazine |
| 5. Travel Plus Middle East | 5. Shabab 20 |

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Servicing GCC Market Visitors

4 Things to consider

- 1** Halal tourism is growing. Ireland is home to a vibrant and growing Muslim community. Over 60,000 Muslims call it home and there is wide availability of Mosques and prayer rooms across the island of Ireland which are easily accessible and welcoming to Muslim visitors.
- 2** Restaurants should offer halal friendly food options.
- 3** Muslim visitors prefer large adjoining rooms such as family suites and alcohol free hotel rooms.
- 4** Accommodation providers can cater to the needs of Muslim tourists by providing copies of the Quran, prayer mats and the direction of Qibla.

Contact Information

Middle East

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