

Outlook for Travel to Britain

- The outlook for travel to Britain for next three months is favourable with majority of airlines offering reduced rates on seats for period December to February with exception of festive week. January is historically a good month for Emiratis traveling to the sales as Arabic schools are closed for mid-term.

Britain in the News

- On Thursday 12 November a football match at Zayed Sports City took place between Manchester City, owned by Sheikh Mansour bin Zayed and the UAE national team. Civic dignitaries, business chiefs and education leaders from Manchester met their counterparts to strengthen ties in the sporting, cultural, aviation and academic sectors.
- H1N1 (swine) flu is still in the news with the daily Abu Dhabi based newspaper The National running a front page story (22 November) about the first cases of a Tami-flu-resistant strain appearing in Cardiff raising new health fears about the dangers of the virus mutating.
- Sheikh Mohammed bin Rashid Al Maktoum, Ruler of Dubai met Queen Elizabeth II in Windsor in November as well as meeting Gordon Brown to discuss co-operation between UAE and Britain and Middle East peace.

General Market Mood

- Dubai's financial woes have tamed the once independent emirate and forced it closer to Abu Dhabi which holds 90% of the UAE's oil. The global financial crisis that swept into Dubai last year not only put an end to a construction boom but saddled it with \$80 billion of debt.
- Sheikh Mohammed last week demoted three business aides and fired one. All had been pivotal in the debt-fueled expansion of past years, requiring Dubai's rescue with a \$10 billion loan from the UAE central bank.
- Dubai's financial crisis has left many of the Expats concerned about their job security and worried about debt and as a result it is likely they will cut down on long-haul travel and increasingly be looking for value for money at every opportunity.

Consumer Behaviour

- Over the last quarter, short haul leisure trips have increased becoming more popular than long haul.
- Over half of leisure travellers usually travel in a small party size of up to 3 people usually with spouse and young children/ friends rather than with the parents or older children.
- Going on home visits and visiting friends/family are still the most popular types of leisure holiday travel although luxurious holidays, like beach resorts, cruises and romantic trips are expected to become more popular.
- UAE is a very late planning and booking market with almost half plan within 2 months of the trip and almost three quarters book within 2 months.
- Surfing online is the key source of information for choosing airlines, hotels etc. although word of mouth is important when deciding on tours.
- Value for money is a key influencer for accommodation selection and this could be why staying in budget hotels or family/friends' is most popular when on holiday.
- With regard to environmental consciousness in UAE many are still unaware if they pay extra it will offset carbon emissions from air travel and paying extra is still a concept people are not used to in the market.(Yougovsiraj travel tracker 9/9)

Media Matters

- The Times was dramatically pulled off newsstands following a ban over its coverage of Dubai's debt problems; the UK's media barrage of Dubai crisis may impact future coverage on Britain in local media.

Routes and Fares

- Regional carriers such as Emirates, Etihad and Qatar Airways have increased routes and frequencies to the USA. Emirates now flies double daily to New York with daily flights to Los Angeles, San Francisco and Houston with Etihad flying to New York daily and Chicago 6 times a week.
- In anticipation of increased traffic for 2010 FIFA World Cup Etihad Airways has launched flights to Cape Town via its current daily airbus A330 service to Johannesburg; 40,000 South Africans live in the UAE.
- The Middle East is a growing market for Japan (38,380 visitors in 2008, a 6% increase over 2007) therefore Emirates, Etihad and Qatar are all looking to increase access next year.
- UAE based airlines have been unveiling great deals for the Eid Al Adha holiday (26 Nov) and festive period. For example British Airways are offering business class travel for AED8,995 (£1,499) a discount of £500.
- Etihad Holidays are offering 'hot deals' for December travel London for 3 nights £551, Manchester £645 and Malaysia £535.

Business Tourism

- The types of business trips taken have remained the same since the last year with training, visiting potential clients, attending conferences and exploring new markets are trips expected to be taken more over the next year
- Promotions and deals continue to be the strongest drivers for choosing a company to book for trips
- Price, hotel's location and quality are also important when choosing a hotel for business (Yougovsiraj travel tracker 9/9)

Leisure Travel Trade

- A new agency 'Arabian Pacific Tours' has opened in Dubai that is catering to expat clientele offering sporting packages; this offers great potential for VisitBritain to join forces to promote Britain upcoming sporting events.
- To combat the market's distinct lack of knowledge of Britain outside London VisitBritain will launch Britagent to the trade at DEBI in May 2009.
- According to latest IPS figures UAE visitors increased 14% in H1 with holiday traffic up 50%.

Competitor Activity

- A major GCC travel agency, Kanoo Travel has partnered with the Hong Kong Tourism Board to offer travelers across the Gulf a range of holiday packages; primary markets they are targeting are UAE, Saudi Arabia and Bahrain.
- Thailand has exempted visa fees for tourists going there until the end of 2009 to increase visitor's numbers while for airlines landing and parking fees have been hugely reduced. In addition they are offering a 50% discount on entry fees to a large number of attractions.
- Singapore are leveraging their promotions by showcasing premium family-friendly attractions to Middle East-based travellers to boost repeat travellers. (50, 262 travellers in the first half of 2008, visitor numbers grew by 18% over last year's figure). The United Arab Emirates, Qatar, and Iran

were recorded as the top visitor markets in the Middle East for the first six months of the year, posting growth of 23%, 18% and 37% respectively.

- Tourism Malaysia recently exhibited at the Adrenaline Sports Live Exhibition promoting adventure holidays. They are targeting UAE based travellers at the event by advertising a flight time of only 7 hours, an array of adventure sports available in the country, as well as having a large Muslim population.

VisitBritain Activity Update

- On 29 October – '1000' days to go Olympic event in association with PD partners was held at British Embassy in presence of HRH Duke of York and with Danny Crates as guest speaker.
- Classic Britain press trip to London took place 5-8 November in conjunction with British Airways and the Dorchester to complement marketing campaign (4 national dailies Eng/Arabic).
- Journeys of a Lifetime press trip took place in November with Mandarin Oriental and Virgin Atlantic (4 magazines and one national daily).
- Travel trade breakfast forum with 4 prominent agencies to gather market intelligence took place on 25 November.
- Destination Britain & Ireland recruitment under way with first email communication going out to trade on 25 November offering early bird special (15 companies already signed up).

Upcoming activity

- Press trip (Khaleej Times) to Edinburgh with Virgin and Visit Scotland planned for 10-13 December to promote launch of Sherlock Holmes movie in UAE on 24 December.
- Press trip to London with Virgin and Langham Hotel planned for 13-17th December with Abu Dhabi based daily The National with Sherlock Holmes theme.
- Launch of Sherlock Holmes movie promotion on 6 December with Warner Brothers and Cinestar cinemas across UAE - offering exposure in excess of AED80,000 (£15,000) and a direct mail campaign to 70,000+ people.
- Working with Virgin Atlantic and Westfield to launch a luxury campaign in January which will run until May 2009 offering upper class bookers a free VIP card from Westfield. Total cost of campaign £50,000.
- Meeting with MBC TV station in December regarding trip to Britain in first quarter of 2010.
- Meeting with local TV stations in December to discuss opportunities around 2012 Olympics .
- In discussions with Mandarin Oriental and Harrods to do a mini-sales mission to Kuwait and Saudi for local Ladies groups in March 2010.

Who's in Town?

- Andrew Flintoff is currently recuperating from surgery in Dubai and was kind enough to support VisitBritain and our Public Diplomacy partners at our Olympics '1000 days to go' event on 29 October along with HRH Duke of York and Para Olympian Danny Crates.
- Alexandra Wixon from VisitBritain in-house agency to visit Dubai to support tactical creative brief work 6-10 December.