Understanding and engaging with UK expats in the UAE

VisitBritain
Research conducted by Kubi Kalloo in March-April 2021
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Source: VisitBritain/Kubi Kalloo research March-April 2021
Persona graphics sourced from Flaticon
Background

- The United Arab Emirates (UAE) is an important source market for inbound tourism to the UK, ranking 20th for visits among all inbound markets in 2019, and 9th for spend. This market is the source of exceptionally valuable visitors, with the average spend per visit being more than double the all-market average in the same year.

- 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.

- Before this project, this group had not been the subject of specific research from VisitBritain. Sentiment data suggests that post COVID-19, VFR* visitors, who have a pre-existing purpose for visiting the UK, will become an important audience to drive recovery. Some of the most valuable of these visitors are likely to come from the UAE, so it is important to fully understand this audience in order to maximise their future spending potential.

- With this research, we aimed to gather robust numbers to gauge the potential of this audience, as well as get under their skin to understand their attitudes and behaviour in order to inspire strategies to engage with them.

Source: VisitBritain/Kubi Kalloo research, March-April 2021 *visiting friends and relatives
Methodology

Quantitative survey
Fieldwork 18th March – 1st April 2021

300 UK Nationals living residents in any area of the UAE

- Gender / Age / Region lived in the UAE left to fall-out naturally
- Have taken a trip back to the UK to visit friends and family in the past 3 years
- Are all holiday decision makers – solely responsible or jointly responsible

Qualitative in-depth interviews
Fieldwork 26th March – 1st April 2021

8 UK Nationals living residents in any area of the UAE

Sample evenly split between those who are:
- Living alone in the UAE
- Living in the UAE with partner / spouse only
- Living in the UAE with partner / spouse only and children
- Living in the UAE with partner / spouse only but children are at home
- Even split of gender/ age
**Survey sample**

**Gender split**
- 57% Female
- 43% Male

**Age split**
- 18-24: 18%
- 25-34: 48%
- 35-44: 23%
- 45-54: 9%
- 55-64: 2%

**Working status**
- Working: 92%
- Student: 6%
- Not working: 2%
- Other: 0%

**UAE Region split**
- Dubai: 48%
- Abu Dhabi: 34%
- Sharjah: 11%
- Ajman: 2%
- Umm al-Qaiwain: 2%
- Fujairah: 1%
- Ra's al-Khaimah: 1%

**UK region lived**
- London/ Greater London: 43%
- Scotland: 15%
- East Anglia/ East of England: 15%
- Northern Ireland: 13%
- Yorkshire/ Humberside: 4%
- West Midlands: 2%
- Wales: 2%
- East Midlands: 2%
- South East: 1%
- North East: 1%
- South West: 1%
- North West: 1%

**Regions of the UK visited**
- London/ Greater London: 63%
- East Anglia/ East of England: 31%
- Scotland: 27%
- Wales: 16%
- East Midlands: 13%
- Northern Ireland: 13%
- Yorkshire/Humberside: 13%
- North East: 11%
- West Midlands: 8%
- South East: 7%
- North West: 6%
- South West: 4%

**Household income**
- AED11,999: 4%
- AED12,000 – AED15,999: 29%
- AED16,000 – AED19,999: 37%
- AED20,000 – AED39,999: 26%
- AED40,000 – AED59,999: 5%

**Holiday decision making behaviour**
- 52% make most of the decision with spouse/partner/friends
- 48% make most of the decision themselves

**Source:** VisitBritain/Kubi Kalloo research, March-April 2021
How much are UK expats in the UAE worth for UK tourism?
UAE expats spend, on average 10.7 days on a visit to the UK.

They spend, on average £1,250 during their trip.

They spend approximately £117 each day (which is unlikely to include a hotel stay).

This is in comparison to the average international visitor to the UK in 2019 (IPS). While visiting the UK they spend on average 7.1 nights in the UK, spending £696 per visit, and £98 per night.

Source: VisitBritain/Kubi Kalloo, March-April 2021 Quantitative fieldwork; IPS data combined with £60. Spend £30. Where visited and how long
UAE expats spend, on average 10.7 days on a visit to the UK. They spend, on average £1250 during their trip. They spend approximately £117 each day (which is unlikely to include a hotel stay).

Reluctant Returner* expats spend, on average 9.8 days on a visit to the UK. They spend on average £1,000 during their trip.

Valiant Visitor* expats spend, on average 11.5 days on a visit to the UK. They spend on average £1,350 during their trip.

They spend on average £102 each day.

Source: VisitBritain/Kubi Kalloo, March-April 2021; IPS data combined & Quantitative fieldwork: E60. Spend E30. Where visited and how long *More info on personas from slide 16 onwards
How much are UK expats in the UAE worth?

To generate an additional £1m in 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.

Source: VisitBritain/Kubi Kalloo research, March-April 2021
How much more could each UAE expat persona be worth?

If the UK convinces just 1% of visitors like Reluctant Returners to spend 4 days extra in the UK, this could equate to an additional £408,160 in spend.

If the UK convinces just 1% of visitors like Valiant Visitors to spend 4 days extra in the UK, this could equate to an additional £631,088 in spend.

Source: VisitBritain/Kubi Kalloo research, March-April 2021
And what is desire to visit the UK like post COVID-19?

98% of UAE Expats intend to visit the UK either the same amount as they did Pre-COVID (44%) or more (54%) than they did Pre-COVID, suggesting that the UK is top of the UAE Expats’ list to travel to next.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021: E140. Future UK Travel Intentions; Base size n=300
The UK needs to engage Expats differently to how we engage tourists

Tourists
Tourists are engaged by what the UK has to offer as a destination on its own.

The UK needs to be the foreground to their trip

Expats
Expats are coming back to the UK to build and maintain human relationships.

Their friends and family should be in the foreground of their trip with the UK in the background.

Before speaking to them, it’s important to understand the UK’s role is supporting their trip not the singular focus of their trip

Source: VisitBritain/Kubi Kalloo research, March-April 2021
Who am I?

UAE Expat Personas
Why are we using personas?

Not every UAE expat is the same. Their experiences, relationships with the UK and behaviour are likely different. We have used our data to generate two different personas based on demographic and attitudinal statements, that help to give flavour to who UAE Expats are.

Source: VisitBritain/Kubi Kalloo research, March-April 2021
How the Personas were created

A mixed-modal cluster analysis was run amongst our UAE Expat respondents. We aimed to understand their demographic and attitudinal differences, to see how these related to their overall behavioural relationship with the UK and travel behaviour generally. We settled on the following variables as solid explainers of the UAE Expat groups:

- Gender
- Age
- Region living in the UAE
- Holiday decision making behaviour
  - Attitudinal Statements
  - Household income
  - Working status
- Social media usage
- UK Region lived

This created 2 distinct personas which are outlined in the rest of this report.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; A10. Gender; A20. Age; A30. UAE State of residence; B10. Attitudinal Statements; F10. Household income; F20. Working status; F30. Social Media usage; F50. UK Region
Persona 1: Reluctant Returners

Younger than Valiant Visitors (77% 18-34 year old).

Tech savvy (75% willing to invest in new tech) UAE expats who are always on their phone (76% spend a high proportion of time online/on phone).

They are likely to have been in the UAE for between 0-4 years (85%) and either came over to the UAE alone (38%) or moved with their parents / siblings / grandparents (50%).

Which is why they make their travel decisions alone (83%).

This group are keen to get vaccinated, and are dead set on travelling again as soon as they can (84%). And will visit London (85%), The East of England (31%) or Scotland (31%) when they can.

They are likely to be earning between 16,000-19,999AED a month, which makes them slightly less affluent than Valiant Visitors.

They love the life that the UAE offers them, as they are able to earn and save more money than ever before, which they like to spend on weekends away all over the world; holidays filled with action and excitement (62%).

They have, on average, taken 3 holidays in the past 3 years.
They do, however, see their trips back to the UK as a chore (82%), as it takes up a large proportion of their time they could spend travelling elsewhere.

They are less likely to visit the UK on business (41%), but if they do, very few are likely to stay longer on holiday (16% of all Reluctant Returners) or just visit their friends and family (13%).

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; A20. Age; B10. Attitudinal statements; C10. Length of time in UAE; C20. Living with in the UAE; E150. Future UK destination; F10. Household income; B30. Countries visited in the past 3 years; SEG1. Segmentation Questions – Holiday Preference; B50. Business trips to the UK; Base size: Reluctant Returners n=134
Reluctant Returners in detail

Gender split
- 56% Female
- 44% Male

Age split
- 36% 18-24
- 41% 25-34
- 22% 35-44
- 0% 45-54
- 1% 55-64

Working status
- 84% Working
- 13% Student
- 4% Not working
- 0% Other

UAE Region split
- Dubai 49%
- Abu Dhabi 37%
- Sharjah 7%
- Umm al-Qaiwain 4%
- Fujairah 3%
- Ajman 0%
- Ra’s al-Khaimah 0%

UK region lived
- 53% London/ Greater London
- 14% East Anglia/East of England
- 13% Northern Ireland
- 13% Scotland
- 2% North West
- 1% West Midlands
- 1% Yorkshire/Humberside
- 1% East Midlands
- 1% Wales

Regions of the UK visited
- London/ Greater London 67%
- East Anglia/ East of England 29%
- Scotland 25%
- Wales 16%
- Northern Ireland 13%
- East Midlands 9%
- Yorkshire/Humberside 9%
- North East 8%
- West Midlands 7%
- North West 7%
- South East 4%
- South West 3%

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; A10. Gender; A20. Age; F20. Working status; F10. Household income; A50. Holiday decision making behaviour; A30. UAE State of residence; F50. UK Region; A40. Regions of the UK visited (total); Base size: Reluctant Returners n=134
Reluctant Returners will travel as soon as possible. Most likely to the UK; but this is because they feel they should

- I will travel internationally as soon as I can, after I get the vaccine: 84%
- The main reason I travel back to the UK is because I feel I should: 83%
- When I travel back to the UK, I like to visit places that bring back pleasant memories of the past: 78%
- I spend a high proportion of my time online / on my smartphone: 76%
- I’m willing to invest in new technology even though it is more expensive and/or more likely to contain bugs / issues: 75%
- I miss the historical sites that The UK has to offer: 72%
- I will be intending to take fewer, but longer holidays: 69%
- Travelling is one of my passions in life, not just something I feel I have to do: 66%
- When I travel home, I tend to visit new places rather than the places I already know: 66%
- I will leave booking until later / last minute: 60%
- I will favour destinations I have been before, rather than new places: 7%

They miss the UK and what it has to offer, but this perception is not stronger than the need or duty to return home, which is very strong in this group.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; B10. Attitudinal Statements – T2B scores / Reluctant Returners n=134
Reluctant Returners have visited a plethora of different destinations in the past 3 years.

On average Reluctant Returners visit 2.9 countries each year, but they may have visited some countries multiple times.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; B30. Countries visited in past 3 years / Reluctant Returners n=134
And their main, most immediate desire is to visit the UK

72% of those intending to visit the UK want to do this within 2021, suggesting going home is their most direct need.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; B40. Future travel intention / Reluctant Returners n=134
Reluctant Returners are motivated by a wide variety of activities when it comes to travelling.

But one single activity is not enough to entice Reluctant Returners, with this group choosing 10.8 activities on average, suggesting a range of different travel interests.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021: B20. Travel Interest / Reluctant Returners n=134
Reluctant Returners are looking to visit London, the East of England and Scotland as their first priority.

The vast majority of Reluctant Returners are driven by the desire to return to London with only 1-in-5 unlikely to want to visit London on their next trip.

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021: E150. Future UK destination intention / Reluctant Returners n=134
Persona 2: Valiant Visitors

Slightly older (43% 35+) over-index as 35+ years old.

They have been in the UAE for longer than Reluctant Returners (26% 5+ years). They moved over with their families, their spouse (33%) and/or children (30%) and are beginning to see their life as a UAE resident.

They have a clear, positive perception of the UK, and are less likely to see the UK as a place they ‘should’ visit (61%).

More likely to have been vaccinated as of April 2021, and are interested in travelling again as soon as they can (64%), although this desire is not as strong as Reluctant Returners. They will visit London (66%), the East of England (36%) or Scotland (33%) first.

They are slightly more affluent (39% between AED20,000 - AED59,999).

They are travelling around the Gulf and the UAE domestically with their family. This persona has visited, on average, 3 countries in the past 3 years. They want a holiday at a more relaxed, slower pace (54%).

They are setting roots for themselves and their family, growing into not just what travel opportunities the UAE gives them. They are working hard, but playing hard at home.

Less than half of Valiant Visitors visit the UK on business (44%), but if they do they are most likely to visit some friends, family and have a short break (13% of Valiant Visitors), than just stay for business purposes (11%).

Valiant Visitors in detail

Gender split
- 56% Female
- 44% Male

Age split
- 18-24: 4%
- 25-34: 53%
- 35-44: 23%
- 45-54: 17%
- 55-64: 3%

Working status
- Working: 98%
- Student: 0%
- Not working: 1%
- Other: 1%

UAE Region split
- Dubai: 47%
- Abu Dhabi: 33%
- Sharjah: 14%
- Ajman: 4%
- Ra's al-Khaimah: 2%
- Umm al-Qaiwain: 0%
- Fujairah: 0%

UK region lived
- London/Greater London: 34%
- Scotland: 16%
- East Anglia/East of England: 15%
- Northern Ireland: 12%
- Yorkshire/Humberside: 7%
- Wales: 4%
- East Midlands: 3%
- West Midlands: 3%
- South East: 2%
- South West: 2%
- North East: 2%
- North West: 0%

Household income
- AED11,999: 2%
- AED12,000 – AED15,999: 25%
- AED16,000 – AED19,999: 34%
- AED20,000 – AED39,999: 31%
- AED40,000 – AED59,999: 8%

Household decision making behaviour
- 80% make most of the decision with spouse/partner/friends
- 20% make the decision themselves

Source: VisitBritain/Kubi Kalloo Quantitative research; Quantitative fieldwork March-April 2021. A10. Gender; A20. Age; F20. Working status; F10. Household income; A50. Holiday decision making behaviour; A30. UAE State of residence; F50. UK Region; A40. Regions of the UK visited (total); Base size: Valiant Visitors n=166
Valiant Visitors are less intent on travelling as soon as possible compared to Reluctant Returners

- I will travel internationally as soon as I can, after I get the vaccine: 64%
- The main reason I travel back to the UK is because I feel I should: 61%
- I miss the historical sites that The UK has to offer: 59%
- Travelling is one of my passions in life, not just something I feel I have to do: 58%
- When I travel back to the UK, I like to visit places that bring back pleasant memories of the past: 57%
- When I travel home, I tend to visit new places rather than the places I already know: 55%
- I spend a high proportion of my time online / on my smartphone: 49%
- I’m willing to invest in new technology even though it is more expensive and/or more likely to contain bugs / issues: 47%
- I will be intending to take fewer, but longer holidays: 47%
- I will leave booking until later / last minute: 39%
- I will favour destinations I have been before, rather than new places: 11%

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; B10. Attitudinal Statements – T2B scores / Valiant Visitors n=166
Valiant Visitors have visited very slightly more countries than Reluctant Returners in the past 3 years.

On average Valiant Visitors visit 3.2 countries each year. They have been in the UAE slightly longer than Reluctant Returners.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; B30. Countries visited in past 3 years / Valiant Visitors n=166
Valiant Visitors have a strong desire to visit a wide variety of destinations, with the UK most top of mind.

81% of those intending to visit the UK intend to visit the UK in 2021, suggesting going home is their most direct need.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; B40. Future travel intention / Valiant Visitors n=166
Valiant Visitors just want to escape from their lives, amongst their friends and family.

But one single activity is not enough to entice Valiant Visitors, with this group choosing 10.3 activities on average, suggesting a range of different travel interests.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; B20. Travel Interest / Valiant Visitors n=166
Valiant Visitors are looking to visit London, the East of England and Scotland as their first priority.

Their desire to visit London is significantly lower than Reluctant Returners.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021: E150. Future UK destination intention / Valiant Visitors n=166
Reluctant Returners and Valiant Visitors have some alignment with the VisitBritain Buzzseekers segment.

From 2017, VisitBritain carried out a research project to define global audience segments. To learn more about Buzzseekers, and the other segments, visit our page on understanding our customers.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021: Segmentation questions / Reluctant Returners n=134, Valiant Visitors n=166
Reluctant Returners are more tech savvy, and more ‘across’ different social media sites compared to Valiant Visitors

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<tr>
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<th>Reluctant Returners</th>
<th>Valiant Visitors</th>
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<tbody>
<tr>
<td>Instagram</td>
<td>92%</td>
<td>92%</td>
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<td>Facebook</td>
<td>76%</td>
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<td>Reddit</td>
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Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; F30. Social Media Usage / Reluctant Returners n=134; Valiant Visitors n=166
Reluctant Returners are more interested than Valiant Visitors in visiting TV locations on a future trip.

- **I watch TV and or films set in the UK**
  - Total: 86%
  - Persona 1: 88%
  - Persona 2: 84%

- **I am interested in visiting filming locations from British TV / Film in the future (e.g. The Crown / Bridgerton etc.)**
  - Total: 70%
  - Persona 1: 78%
  - Persona 2: 64%

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E80. TV & Film locations [T3B scores]; Total n=300; Reluctant Returners n=134; Valiant Visitors n=166
My new lifestyle!

How is my life going in the UAE?
Reluctant Returners
How did they get here?

38% of Reluctant Returners came to the UAE alone.

A further 50% came with their parents / siblings / grandparents.

Dear diary, I’ve been having a tough time at home. My job is so stressful and I have nothing to show for it. The British weather is getting me down, honestly it’s just so grey all the time. I just need to break the cycle.

Dear diary, I’ve been looking for a job, literally anywhere and in anything, I don’t care at this point. Fingers crossed.

Dear diary, I’ve been offered an opportunity to go to the UAE?! I mean, I’m a risk taker, so I’m going to go for it. I don’t really know much about it, but some of my friends have told me it’s cool – I hope it’s cool.

Dear diary, today is the day, I’ve decided to drop everything and come to the UAE.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; C20. Living with in UAE; Reluctant Returners: N=134; Qualitative In-Depth Interviews
And how is it going?

They have been here for (on the whole) **0-4 years** (85%) meaning they are relatively new to the UAE.

Hi!

Life in the UAE is AMAZING!!!

I love my new life, it’s so cool being “the person that moved to the UAE.”

There is so much to do here, honestly “If you can think of it, the UAE has got it.”

And don’t get me started on the travel! I can spread my wings and fly. I can go for a weekend in Vietnam, Thailand, Malaysia, the Seychelles, even Kenya!!!

I never thought I’d go to these places, let alone for a weekend!

I love my life here. The weather is better. The money is better (I’ve never saved so much in my life!) Honestly, the UAE isn’t as strange as I thought it would be.

I can prioritise fun, and I have had so many brunches it’s insane

The UAE is the key that has unlocked my world

Miss you!

Reluctant Returner

X
Valiant Visitors
How did they get here?

33% of Valiant Visitors came to the UAE with their spouse / partner.

A further 30% came with children.

Dear diary, we need a change. **We’re really struggling** to save anything, and we’re working **SO** hard to get by. All our money goes on **rent** and commuting. Honestly, today; life feels so bleak and tiring.

Dear diary, so….. an opportunity has come up with my job to go **out to the UAE**. We chatted about it over dinner and we’re really entertaining it. We’d **have more to save**, we’d have **better weather** and we’d be looked after better. I think we’re going to do it, you know. I’m going to tell them tomorrow.

Dear diary, you won’t believe this… They want to **fly us out there**, to the UAE, and get a feel for what it’s like. They’re **paying for everything**… I mean, what is there not to love!

Dear diary. Wow. **That was amazing**. They really know how to entice people to come! We said yes. I mean, **after such a welcome**, how could we possibly say no?

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; C20. Living with in UAE; N=166; Qualitative in-depth interviews
And how is it going?

Valiant Visitors differ in their time spent in the UAE

Most have been here for (on the whole) **0-4 years** (74%) with Valiant Visitors over-indexing on residents who have been here for 5+ years (26%).

Hello from the Sunny UAE!

Honestly, the sun is ALWAYS shining here and we’ve got so much saved up!

We’ve just got back from a trip inside the UAE, honestly there are so many nice places here! It’s nice to just see what the country I live in has to offer, you know?

Don’t worry, we’re still travelling just as much as usual, it’s just more relaxing not taking a flight. We’ve still got a few countries left to tick off, which we need to get booked soon!

We’ve actually just got a gardener! Never had a gardener in the UK. And guess what, it’s only £40 a month. I know, I know, it’s not much for the gardener, but the garden has never looked so good.

I do have to say, the supermarkets here are terrible! I honestly just miss Sainsburys.

But it’s relaxing. It’s peaceful. I feel good.

Miss you!

Valiant Visitor

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; C10. Length of time in the UAE; N=166; Qualitative in-depth interviews
And how long will they stay?

**Valiant Visitors in the Past**
If Valiant Visitors came to the UAE alone and met their partner/spouse in the UAE, they have moved from this stage to the following stages.

**Reluctant Returners in the Future**

### Valiant Visitors today
‘I’m really missing home.’

The UK is fondly remembered and has a particular lure as it will ‘always be my home.’ Once this lure becomes too much, they will start to look towards home and visiting as much as possible.

Reluctant Returners are not aware that this will hit them yet.

### Reluctant Returners today
‘Do I have to go back?’

The desire to go elsewhere is currently high. Their life in the UAE affords them luxury, with a heavier pay packet, and more opportunities to travel - why would they waste a trip on the UK?

- **0-4 years**

- **5+ years**

**The desire to start a family**

Some have children in the UAE. Some feel the UAE gives them everything that they need in schooling their kids and makes them feel more attached to the UAE and building their life here. Others are worried that their kids will grow up “not learning how to graft,” and are looking to move back once they’re born, thus want to travel back and experience the UK together.

Some Reluctant Returners use the prospect of having a child as the time to move home.

Source: VisitBritain/Kubi Kalloo Qualitative in-depth Interview research March-April 2021
Length of time in the UAE and who they live with in the UAE

Valiant Visitors have been in the UAE for slightly longer than Reluctant Returners.

Valiant Visitors live with their spouse / partner / kids whilst Reluctant Returners live with family or by themselves.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; C10.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; C20.
My relationship with the UK

How do I feel about the UK?
The UK is all about cultural comfort, the diversity of weather and scenery it offers expats

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<thead>
<tr>
<th>Cultural comfort</th>
<th>Diversity</th>
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<td><strong>It has the people that made me who I am</strong>&lt;br&gt;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 <strong>UK home</strong>. This is stronger amongst Valiant Visitors (70% say it feels welcoming where anyone can belong) compared to Reluctant Returners (54%). Valiant Visitors are more focussed on their network, and think about them more regularly as they have been away from them for longer.</td>
<td><strong>It can be visited anytime of year</strong>&lt;br&gt;UAE Expats are less bound by season and are more likely to come and visit the UK anytime. 52% of Reluctant Returners and Valiant Visitors 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.</td>
</tr>
<tr>
<td><strong>And it feels safe to visit</strong>&lt;br&gt;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.</td>
<td><strong>It has landscapes and coastlines</strong>&lt;br&gt;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.</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; D10. Imagery Statements; Reluctant Returners n=134; Valiant Visitors n=166
How does this differ between Personas?

**Reluctant Returners**

Reluctant Returners have a more muted perception of the UK, believing other destinations have more to offer than the UK. It is seen as a chore to visit after all.

The opportunity is to communicate what the UK has to offer, to strengthen the perception of the UK.

Believes the following perceptions are owned by the UK**

<table>
<thead>
<tr>
<th>Perception</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcoming/ a place where anyone can belong</td>
<td>54%</td>
</tr>
<tr>
<td>Visited any time of year</td>
<td>52%</td>
</tr>
<tr>
<td>Safe for me to visit</td>
<td>40%</td>
</tr>
<tr>
<td>Easy to travel to/ has direct flights</td>
<td>38%</td>
</tr>
<tr>
<td>Has awe-inspiring landscapes that can be…</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Valiant Visitors**

Valiant Visitors have a clearer, more complete picture of what the UK has to offer. They see the UK as less of a chore to visit.

The opportunity here is to further talk up the aspects they know, the peaceful, beautiful coastal areas of the UK.

Believes the following perceptions are owned by the UK**

<table>
<thead>
<tr>
<th>Perception</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcoming/ a place where anyone can belong</td>
<td>* 70%</td>
</tr>
<tr>
<td>Visited any time of year</td>
<td>55%</td>
</tr>
<tr>
<td>Easy to travel around the country</td>
<td>* 45%</td>
</tr>
<tr>
<td>Easy to travel to/ has direct flights</td>
<td>45%</td>
</tr>
<tr>
<td>Peaceful and relaxing</td>
<td>45%</td>
</tr>
<tr>
<td>Beautiful coastal areas to explore</td>
<td>* 43%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; D10. Imagery Statements; Reluctant Returners n=134; Valiant Visitors n=166 **Question asked respondents to match attributes with a range of destinations, meaning that percentages are slightly lower than what would be seen from a question with only the UK listed

*significantly higher than Reluctant Returners at 90% CI
Why do I visit the UK?

What does a trip to the UK look like?
Why do visit the UK?

To visit friends & family

- 81% visit their friends and family on their trip
- 67% only return home to visit their friends and family
- 16% use this trip as an opportunity to stay longer on a trip

And desire is stronger in 2021 because of the separation UAE Expats have felt due to COVID-19

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E70. Activities undertaken; E10. Type of trip; Total sample N=300
Reluctant Returners
Why do I go to the UK?

66% of Reluctant Returner’s trips were solely to visit friends & family

14% of this group stayed longer on this trip to holiday

81% spent quality time with friends or family on their trip

83% go home because they feel they should

49% go home during winter

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E10. Type of trip; E70. Activities undertaken; B10. Attitudinal statements; E20. Date of visitation; Reluctant Returners N=134; Qualitative in-depth interviews
Hey! How’s the UAE?

So much to think about. So much going on. I’ve got so much planned, but nothing planned. I feel like a royal on the tour of a country. Honestly, here is just two days of what I’m up to:

- Lunch with Grandma.
- Pints with Uncle Tim and his boys.
- Curry with the lads.
- Family dinner with Mum.

Don’t get me wrong, I love being the centre of attention, but this is getting really busy. I’ll be happy to be home I’m sure.

I’m starting to get excited though, I’ve missed a good old curry. Not that I can’t get a curry out there, but it’s not a British curry, you know. I want the curry I grew up with.

I can’t wait to show everyone how much I’ve changed!
Where do I stay, for how long, who do I travel with and how much do I spend?

- **Travel alone**: 46%
- **Travel with family friends**: 28%

The lure of travelling alone fuels their love of this persona of ‘The person who lives in the UAE.’

- **Stay with friends/family only**: 63%
- **Split with friends/family and hotels**: 30%

They are more likely to ‘nip back home’
50% of their trips home are for 1-7 nights
The average number of nights 9.9 nights.

Although they aren’t staying in hotels, they are spending a large amount in the UK.
51% of Reluctant Returners spend between £1,001 - £1,500 on a trip to the UK
and a further 20% spending over £1,501
They are earning more money, and they can show their friends and family a good time because of it.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E50. Travel companion; E40. Where stayed; E30. Length of stay; E60. Spend N=134
And how do I plan and book?

**78%**

**tend to plan for 1-2 months,** spending a long time deciding when to come, what window of time to visit, and how long.

**88%**

**The booking process takes less time.** They are more likely to take less than a month.

The booking process

- Book direct with an airline: 45%
- Use online travel agents for booking/planning: 43%
- Use friends/family/word of mouth: 25%
- Use price comparison sites: 23%
- Use travel review sites: 19%
- Use in person travel agents: 16%

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E100. Planning trip; E110 Booking trip; E120. Resources used to plan/book N=134
Reluctant Returners – their last trip to the UK

**Type of trip**
- Solely visiting friends and relatives: 66%
- VFR but stayed longer for a holiday/short break: 14%
- VFR but stayed longer for holiday/short break and business: 12%
- VFR but stayed longer on business: 7%
- Other: 1%

**Date of visitation**
- NET: Winter: 49%
- NET: Spring: 21%
- NET: Summer: 15%
- NET: Autumn: 15%

**Where visited**
- London: 47%
- The East of England (e.g., Cambridge, Norwich, Essex): 16%
- Scotland: 14%
- Northern Ireland: 13%
- Yorkshire & the Humber (e.g., Humber, Leeds, York, Yorkshire Dales): 7%
- Wales: 6%
- The West Midlands (e.g., Birmingham, Stratford upon Avon, Coventry): 4%
- The East Midlands (e.g., Leicester, Derby, Peak District): 1%
- The South West (e.g., Bristol, Bath, Devon, Cornwall): 1%
- The North West (e.g., Manchester, Liverpool, Lake District): 0%
- The South East (e.g., Brighton, Oxford, Kent): 0%
- The North East (e.g., Newcastle, Durham): 0%

**Travel companion**
- I travelled to The UK alone: 46%
- With adult family members (e.g., parents/grandparents): 28%
- With my spouse/partner: 12%
- With my spouse/partner and children: 7%
- With my friends – who are British nationals: 5%
- With my friends – who are not British nationals: 1%
- With my children: 1%
- Other (please specify): 0%

**Where stayed**
- Only with friends/family (at their house): 68%
- A mix of a hotel and friends/family: 30%
- Only in a hotel/commercial stay (B&B/Pub/Hotel): 5%
- Other (please specify): 1%
- A campsite: 0%
- A paid for residential stay (e.g., Airbnb): 0%

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E10. Type of trip; E20. Date of visitation; E30. Where visited; E40. Where stayed; E50. Travel companion
Reluctant Returners mainly come to the UK to satisfy their need to visit their friends and family.

% who actually did an activity they were initially interested in, on their last trip to the UK

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; B20. Travel interest / E70. Activities undertaken; Reluctant Returners n=134
Why do I go to the UK?

68% of Valiant Visitors’ trips were solely to visit friends and family

17% of this group stayed longer on this trip to holiday

80% spent quality time with friends or family on their trip

61% return home because they feel like they should

20% visit the UK during Summer

Dear Diary… It’s time to go home again. Yeah, yeah it’ll be fine. It’s just, you know, staying on floors, sofas and such, it’s just a bit tiring. I wish I could bring the kids, they’d love to see the UK.

But the system works, public holidays in the UAE for me, annual leave for the family. I’m going for 10 days again, and it means I can see everyone. Yes. Everyone.

And anyway, I’m coming home in summer, what else is there to do in the UAE except move from my air conditioned apartment, to my air conditioned car, to my air conditioned office and back. At least the UK will be temperate, and at least a bit different than sweltering heat!

I can’t wait to see everyone! It’s going to be SO nice! It’s been a full year, again! I really should come back more…

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E10. Type of trip; E70. Activities undertaken; B10. Attitudinal statements; E20. Date of visitation; N=166; Qualitative in-depth interviews
What do I do when I’m here?

Other than visiting friends and family, Valiant Visitors like to:

- **Drink wine/ spirits/ beer and visit breweries**: 49%
- **Eat local delicacies**: 42%
- **Experience gourment/ luxury food**: 40%
- **Escape my everyday routine**: 40%

Source: VisitBritain/Kubi Kalloo Quantitative research, March-April 2021; E70. Activities undertaken; In-depth interviews N=166; Qualitative in-depth interviews

Dear Diary…

So what did I do. Well, not a lot really. I just met up with people. All the time. Yeah we visited wine bars and pubs, we went out for dinner, we had this AMAZING meal, and it was just a bit of an escape.

I just sent out this blanket message to people and saw who responded. I didn’t expect so many to respond! I ended up being SO busy. But we did do so many nice things. I just wish I had a bit more time to do things and it wasn’t all so stressful.

All the travelling and the sleeping on floors, it takes it out of you.

It’s about getting the right balance of quality and quantity.
Where do I stay, for how long, who do I travel with and how much do I spend?

They travel back with their spouse/partner

Surprisingly unlikely to travel back with their children (only 39%)... suggesting the trip home is for the spouse/partner.

72% of Valiant Visitors stay only with their friends and family

“It becomes very tricky to stay with friends and families when you have children,” which may be the reason they are left behind.

Length of visit:

70% 7 nights+

Spend

11.4 days in the UK on their trip.

40% spend £1,001 - £1,500

27% spend £1,500+

Willing to spend on their trip in the UK.

Not interested in saving costs.

More likely to spend the money to enjoy themselves with their friends and family.

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E50. Travel companion; E40. Where stayed; E30. Length of stay; E60. Spend N=166; Qualitative in-depth interviews
And how do I plan and book?

71% spend between 3 weeks and 2 months planning their trip home... But it can be shorter, with 18% completing their planning in 2 weeks.

88% The booking process takes them approximately less than a month to get everything booked for their trip.

- 84% Book direct with an airline
- 53% Use in person travel agents
- 26% Use destination websites to plan their trip
- 23% Use their friends/family to plan their trip

Hey guys! Anyone know any new places that you that you really want to go in the area? Our treat x

Can’t wait 😊 who are you booking with? You should be using a price comparison site!

Yes Mum, I know price comparison sites exist, but we get points with Emirates that we use on other trips. We tried with Wego but it was only a bit cheaper. Don’t worry we can afford it x

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E100. Planning trip; E110 Booking trip; E120. Resources used to plan/book N=166; qualitative in-depth interviews
Valiant Visitors – their last trip to the UK

### Type of trip

<table>
<thead>
<tr>
<th>Type of Trip</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solely visiting friends and relatives</td>
<td>68%</td>
</tr>
<tr>
<td>VFR but stayed longer for a holiday/short break</td>
<td>17%</td>
</tr>
<tr>
<td>VFR but stayed longer on business</td>
<td>8%</td>
</tr>
<tr>
<td>VFR but stayed longer for holiday/short break and business</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Date of visitation

<table>
<thead>
<tr>
<th>Date of Visit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET: Winter</td>
<td>52%</td>
</tr>
<tr>
<td>NET: Summer</td>
<td>20%</td>
</tr>
<tr>
<td>NET: Spring</td>
<td>15%</td>
</tr>
<tr>
<td>NET: Autumn</td>
<td>13%</td>
</tr>
</tbody>
</table>

### Where visited

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>43%</td>
</tr>
<tr>
<td>The East of England (e.g. Cambridge, Norwich, Essex)</td>
<td>20%</td>
</tr>
<tr>
<td>Scotland</td>
<td>17%</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber (e.g. Humber, Leeds, York, Yorkshire Dales)</td>
<td>9%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>7%</td>
</tr>
<tr>
<td>Wales</td>
<td>4%</td>
</tr>
<tr>
<td>The East Midlands (e.g. Leicester, Derby, Peak District)</td>
<td>2%</td>
</tr>
<tr>
<td>The West Midlands (e.g. Birmingham, Stratford upon Avon, Coventry)</td>
<td>1%</td>
</tr>
<tr>
<td>The North West (e.g. Manchester, Liverpool, Lake District)</td>
<td>1%</td>
</tr>
<tr>
<td>The South East (e.g. Brighton, Oxford, Kent)</td>
<td>1%</td>
</tr>
<tr>
<td>The South West (e.g. Bristol, Bath, Devon, Cornwall)</td>
<td>1%</td>
</tr>
<tr>
<td>The North East (e.g. Newcastle, Durham)</td>
<td>1%</td>
</tr>
</tbody>
</table>

###travel companion

<table>
<thead>
<tr>
<th>Travel Companion</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>With my spouse/partner</td>
<td>33%</td>
</tr>
<tr>
<td>I travelled to The UK alone</td>
<td>25%</td>
</tr>
<tr>
<td>With adult family members (e.g. parents/grandparents)</td>
<td>14%</td>
</tr>
<tr>
<td>With my spouse/partner and children</td>
<td>14%</td>
</tr>
<tr>
<td>With my children</td>
<td>8%</td>
</tr>
<tr>
<td>With my friends – who are British nationals</td>
<td>5%</td>
</tr>
<tr>
<td>With my friends – who are not British nationals</td>
<td>2%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Where stayed

<table>
<thead>
<tr>
<th>Where Stayed</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only with friends / family (at their house)</td>
<td>73%</td>
</tr>
<tr>
<td>A mix of a hotel and friends / family</td>
<td>19%</td>
</tr>
<tr>
<td>Only in a hotel / commercial stay (B&amp;B / Pub / Hotel)</td>
<td>9%</td>
</tr>
<tr>
<td>A paid for residential stay (e.g., Airbnb)</td>
<td>3%</td>
</tr>
<tr>
<td>A campsite</td>
<td>0%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; E10. Type of trip; E20. Date of visitation; E30. Where visited; E40. Where stayed; E50. Travel companion
Valiant Visitors escape their everyday routine in the UK, alongside their friends and family

% who actually did an activity they were initially interested in, on their last trip to the UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Interest</th>
<th>Undertaken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spend quality time with friends or family</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Escape my everyday routine</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Experience a culture different to my own</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Eat local delicacies and island foods</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Meet new people on my travels</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Visit spas, wellness activities</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Visit tropical beaches</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Visit art exhibitions</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Visit music concerts, shows, festivals</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Attend music concerts, shows, festivals</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Attend distinctive national events</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Attend road trips</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Attend outdoor recreational pursuits, e.g., camping</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Attend a significant sporting event</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>High-end retail</td>
<td>80%</td>
<td></td>
</tr>
<tr>
<td>View films, television</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Visit filming locations</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Visit heritage locations</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>See wildlife in their natural habitat</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Enjoy the great outdoors</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Experience night life (e.g., bars, nightclubs)</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Experience luxury (e.g., high-end retail)</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Experience traditional buildings / stateries</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>View ancient / traditional buildings / stateries</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Educational experience / learning new skills</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Participate in a recreational sporting event</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Experience some adventure / thrill</td>
<td>79%</td>
<td></td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo Quantitative research March-April 2021; B20. Travel interest / E70. Activities undertaken; Valiant Visitors n=166
What does the UK mean to me?

What themes do I respond to?
What captivates me?

Expats in the UAE respond to the UK’s culture. In the UAE, they are living an idyllic lifestyle where they are never left wanting. They aren’t captivated by activities. They are lured by home. It is not just nostalgia. It is more nuanced than just nostalgia for the place they left behind.

It’s a motivation for a lifestyle they used to live by; an ethos. Capturing that ethos is key to capturing their interest.

“If I want to go skydiving at a moments notice, within a few clicks I could do it.”

“There’s so much to do, I’m spoilt for choice.”

Source: VisitBritain/Kubi Kalloo research March-April 2021; N=166
What does the UK mean to UAE expats?

The people that make the UK what it is.

We can't get this in the UAE

It could be the UK, it could be anywhere as well.

It is the UK, but not the UK that easily springs to mind

The attributes least associated with the UK specifically

% selecting image represents UK

Source: VisitBritain/Kubi Kalloo quantitative research March-April 2021; D20. Implicit Imagery Task; n=300; Qualitative in-depth interviews
What best represents the UK for Reluctant Returners?

My friends and family, they are the UK to me

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>33%</td>
<td>A Sunday Roast style meal reminds them of 'Family', 'the warmth I feel back home,' it makes them 'miss our traditional way of making food'; it creates smells that remind them of home, and as one person put it 'it depicts the warmth I feel back home.'</td>
</tr>
<tr>
<td>25%</td>
<td>The friends embracing images remind them of all their friends and family back home. It makes them picture their trips back 'the first thing I do when I am back home is spend time with friends' and that 'weekends in the UK are so special. It makes me nostalgic.' It reminds of their friends, of the memories they've created in the UK, and makes them think of what they will do when they get home.</td>
</tr>
<tr>
<td>25%</td>
<td>Friends embracing remind them of family activities, of the 'warm community inside the UK,' of 'love,' and of 'memories of friends.' It creates a loving, thoughtful image of the UK.</td>
</tr>
<tr>
<td>21%</td>
<td>The pint by the fire reminds is a quintessential British image. It 'reminds me of the long nights of chit chat and laughter.' It is cosy, and reminds people of the nightlife of the UK.</td>
</tr>
<tr>
<td>20%</td>
<td>And the balloons with happy faces remind them that 'People in UK are lovely and always smiling', it reminds them of the humour and the people of the UK. It makes people think of happiness and joy, which makes them think of the UK.</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo quantitative research March-April 2021; D20. Implicit Imagery Task: Reluctant Returners n=134; detailing % selecting this image as representing the UK
What best represents the UK for Valiant Visitors?

My friends and family, they are the UK to me

33% Friends drinking outside
   reminds them of ‘Friends… It
   reminds me of how my friends
   welcome me when I am back in
   the UK.’ It’s all about the
   welcome, the image they hold
   when they step off the plane,
   because ‘spending time with my
   friends is one of my priorities
   when I am back home.’

30% The Sunday Roast meal is a
   positive reminder of their family.
   It ‘reminds me of my mother’s
   cooking back at home.’ And it
   can’t be replicated as they have
   ‘never found any like the taste
   and smell of UK food.’
   Supermarkets are also a
   particular pain point for the UAE
   Expat.

27% A pint by the fire reminds
   people of the way it used to be
   ‘Drink… our night was never
   complete without drinking.’ And
   this is an important image for
   people, ‘it’s one of my favourite
   parts of the UK.’

27% Friends embracing, like the
   friends drinking outside, reminds
   of the kindness of people. It
   gives them FOMO, they miss the
   togetherness and the feeling of
   belonging.

25% And the old TV reminds them
   of the TV culture in the UK, it
   reminds them that ‘old is gold,’
   and gives them a nostalgic
   image of ‘family gatherings on
   comedy shows’.

Source: VisitBritain/Kubi Kalloo quantitative research March-April 2021 D20. Implicit Imagery Task D20. Implicit Imagery Task: Valiant Visitors n=166; detailing % selecting this image as representing the UK
So what do they respond to?

• UK Expats in the UAE responds to imagery relating to the warm, welcoming people that make the UK their home. Their experience in the UAE is idyllic. They can do anything they want, whenever they want. But the people they left behind: that is the UK to them.

• So to them, the UK is not about the history, the nature, the nostalgic place that they left behind. It is the people, and capturing the place where they can truly reconnect with those people is key to enticing a longer stay in the UK.

Source: VisitBritain/Kubi Kalloo research March-April 2021
What opportunities exist?
To summarise each persona
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; N=134
Valiant Visitors want to come home 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; N=166
How does the UK tourism industry use this information?
Strategy ideas to engage this audience
Focus on new memories, not the UK they left behind

The UAE Expat, in both cases, made the decision to leave the UK behind. Don’t think about nostalgia, which puts the UK in the past, think about, creating and maintaining *new* memories.

Source: VisitBritain/Kubi Kalloo research March-April 2021
Encourage UK Expats in the UAE to:

Re|Generate

Source: VisitBritain/Kubi Kalloo research March-April 2021
It’s all about fuelling the version of oneself that the UAE Expat left behind. Without their personal relationships, their old UK persona does not exist. Forging the new version of themselves cannot happen without appealing to their old identity.

Source: VisitBritain/Kubi Kalloo research March-April 2021
Nurturing and growing one’s relationships is invigorating for the UAE expat. The new version of oneself, forged in the UAE, has no friends at home. But the old version does. Generating a combined person that maintains their loved relationships at home, whilst fuelling their new identity in the UAE is key to unlocking desire in the UK leisure break.

Source: VisitBritain/Kubi Kalloo research March-April 2021
Encourage your UK Expats to:

Re|Generate

It’s important to create the right conditions to allow UAE Expats to **renew** existing relationships and **forge** new memories. Your job is to provide the place for regeneration.

Source: VisitBritain/Kubi Kalloo research March-April 2021
But keep in mind the following golden rules

- Focus on the people, not the places. They can go anywhere from the UAE, but they can't get the people from the UK anywhere else.

- Focus on relaxation and escape, rather than hustle and bustle. The UAE Expat trip back home is chaotic and stressful, when really they need to escape.

- Focus on emotions, through warmth and compassion. They don’t miss the UK for its attractions so tap into the emotions that are felt amongst these people; finally seeing their friends again.

Source: VisitBritain/Kubi Kalloo research March-April 2021
Understanding and engaging with UK expats in the UAE

VisitBritain
Research conducted by Kubi Kalloo in March-April 2021