

Oman Qatar KSA Kuwait UAE Bahrain

GCC Market Overview

MENA Tourism Travel Trends 2024 – spending closer to home within the region



Tourism spending shares shift closer to home

In 2024, travelers leaving the MENA region are increasingly strategic with where and when they travel.

With North America's relatively higher prices, travelers from the MENA region are increasingly reallocating their lodging spend closer to home within the region with an increase share of lodging sales by 2 percentage points in 2024 over 2019.

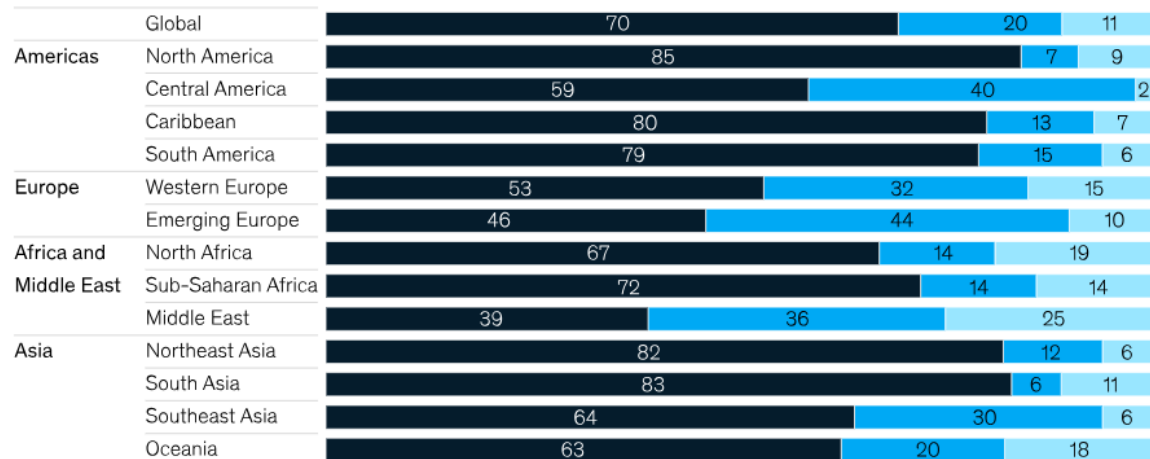
According to Mastercard Economics Institute analysis, MENA travelers are shopping far more for apparel intra-regionally, with an approximate 10 percentage point increase in the share of clothing spend within the Middle East.

Intraregional Travel is the second-largest opportunity after domestic travel, and is growing

Source of travel by region,¹ % of incoming travel

■ Domestic ■ Intraregional ■ Interregional

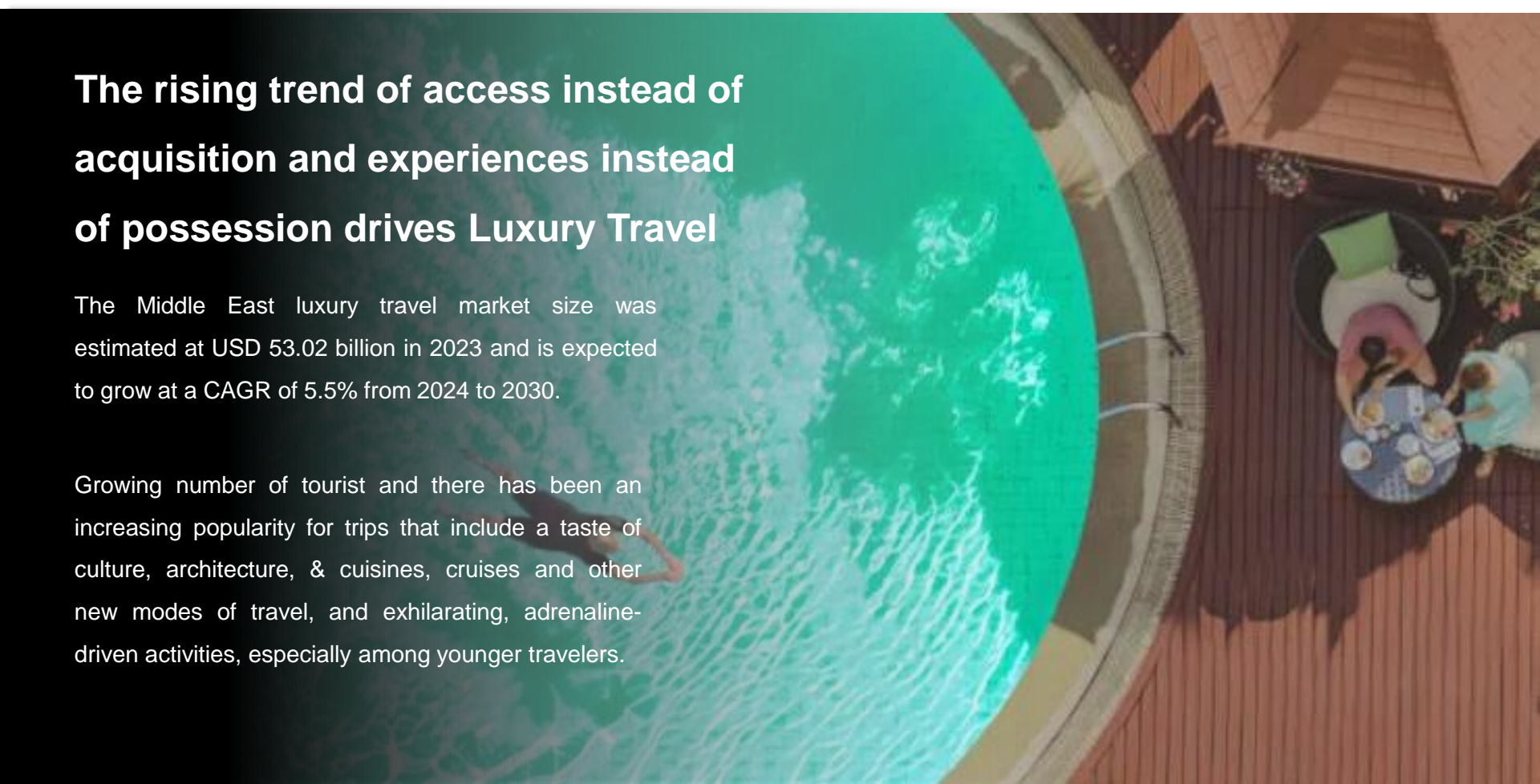
2030 projected



The rising trend of access instead of acquisition and experiences instead of possession drives Luxury Travel

The Middle East luxury travel market size was estimated at USD 53.02 billion in 2023 and is expected to grow at a CAGR of 5.5% from 2024 to 2030.

Growing number of tourist and there has been an increasing popularity for trips that include a taste of culture, architecture, & cuisines, cruises and other new modes of travel, and exhilarating, adrenaline-driven activities, especially among younger travelers.



GCC Market Overview: Demographics

Country	Capital City	Population (Million)	Population % by Citizens	Population % by Foreign Residents
Bahrain	Manama	1.5	47%	53%
Kuwait	Kuwait City	4.4	30%	70%
Oman	Muscat	4.6	54%	46%
Qatar	Doha	2.9	14%	86%
Saudi Arabia	Riyadh	36.4	63%	37%



- The GCC's demographics are characterized by a young and fast-growing population (Median age of 25- 27 years)
- A key characteristic of the GCC population is the skew towards males (61%) than females (39%), reflecting the large male migrant labour force that lives and works in the region.
- Saudi Arabia has the largest population, accounting for 60% share of the total GCC population, followed by the United Arab Emirates (17%), Oman (9%), Kuwait (7%), Qatar (4%) and Bahrain (3%).

GCC Outbound Travel Outlook 2025



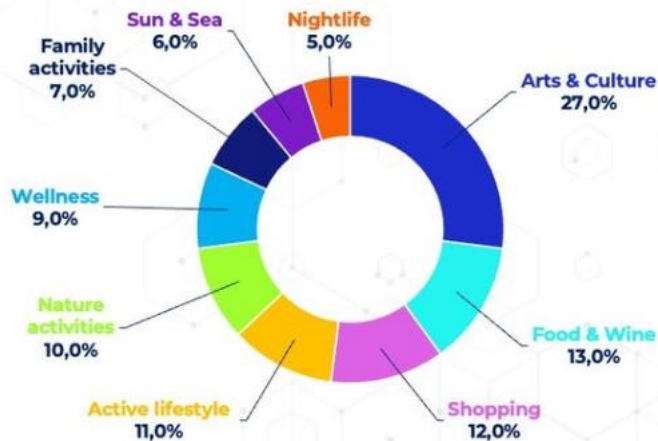
The GCC Outbound Tourism market is estimated to be valued at USD 75.89 billion in 2024 and is expected to reach USD 127.55 billion by 2031.
CAGR: 7.7% (2024-2031)

Opportunities	Drivers	Restraints
New Destination Exploration	Increasing disposable Incomes	Political Instability
Growing tourism infrastructure of destinations	Government policies encouraging tourism	Stringent Visa Policies of destinations

GCC Inbound & Outbound Key Travel Trends

CULTURAL DISCOVERY, THE MAIN DRIVER FOR VISITING GCC DESTINATIONS

Main motivations to visit GCC destinations (January to June 2024)



The GCC Inbound Key Characteristics:

Average length of stay in GCC: **3.46 days**

Key Drivers for Foreigners Visitation:

- Culture & Arts (27%), Gastronomy (13%) and Active Wellbeing Pursuits (30%).
- Safety & Climate

The GCC Outbound Key Characteristics:

Average length of outbound stay: **4.2 days**

Key Drivers for Outbound Visitation:

- Culture & Arts (25%), Gastronomy (12%) and Active Wellbeing Pursuits (36%).
- Direct connectivity & Safety

GCC Traveller – Notable Outbound Travel Traits



Ideal Consumer target segments in the GCC



**Arab
Locals**

- Prefers Luxury, high-end travel and convenience
- Safety and security is the main factor for choosing travel destination
- High spending capacity
- Highly influenced by family, word of mouth, social media and popular trends while choosing a destination



Expats

- Seeking new international destinations
- Opportunities for experiential travel
- Highly influenced by travel package pricing, promotions and social media trends while choosing a destination

GCC traveller segments



Family travelers: Middle East travelers like to take at least one trip every year as a family, if not more. Often, family travel includes not only one's family but is rather more multi-generational, including grandparents, cousins, and siblings. Though bookings are often made for each of these family units separately, they all meet at the destination and stay together.



Weekend travelers: These are more frequent travelers and use every long weekend opportunity to travel and explore destinations at shorter distances. They are looking for a quick break from the routine & mundane of life. They travel with their families or friends and enjoy nightlife, sightseeing, and indulging in shopping.



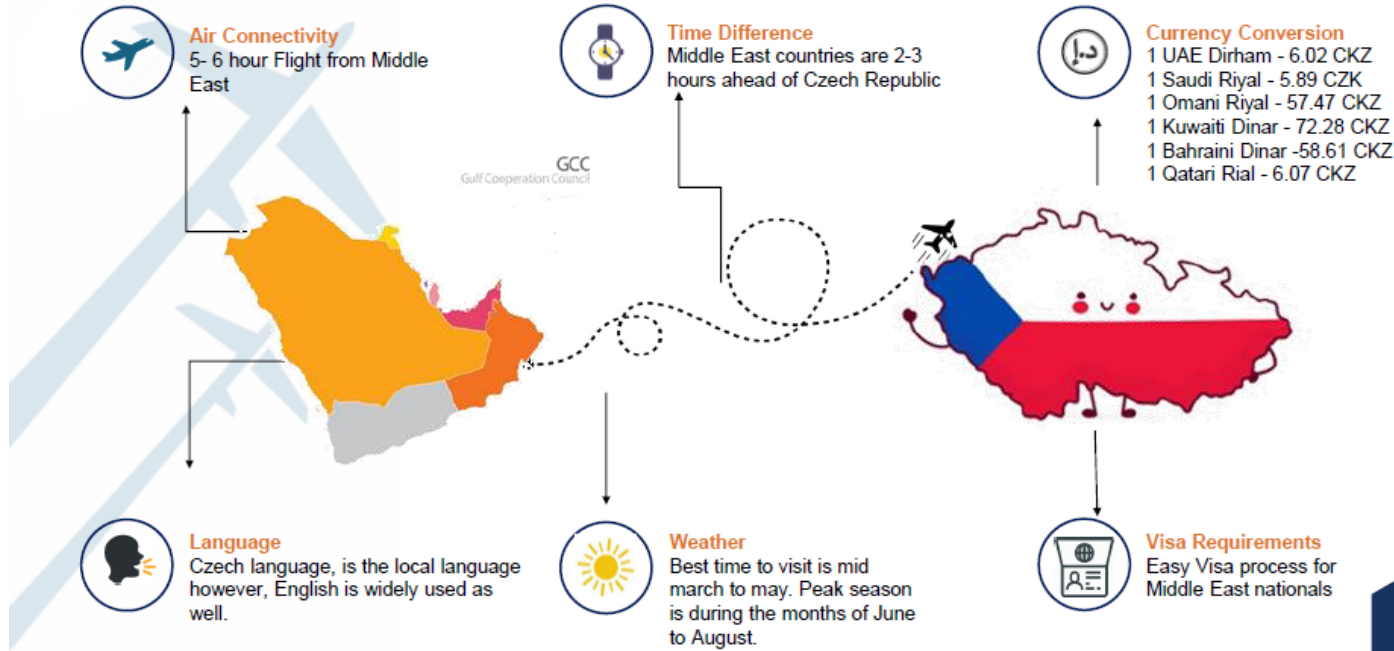
Niche: These travel for sports, adventure, events and festivals and Czechia is the perfect match offering all these experiences. These travel to either participate or attend a specific event or activity such as a sports tournament, music festival, art exhibition etc.



Residents: These are individuals who are citizens of other countries who reside & work in Dubai, they travel for various reasons and a major large segments of the UAE population. They travel for business, weekend trips, sports, events etc.

Czechia for GCC Travellers

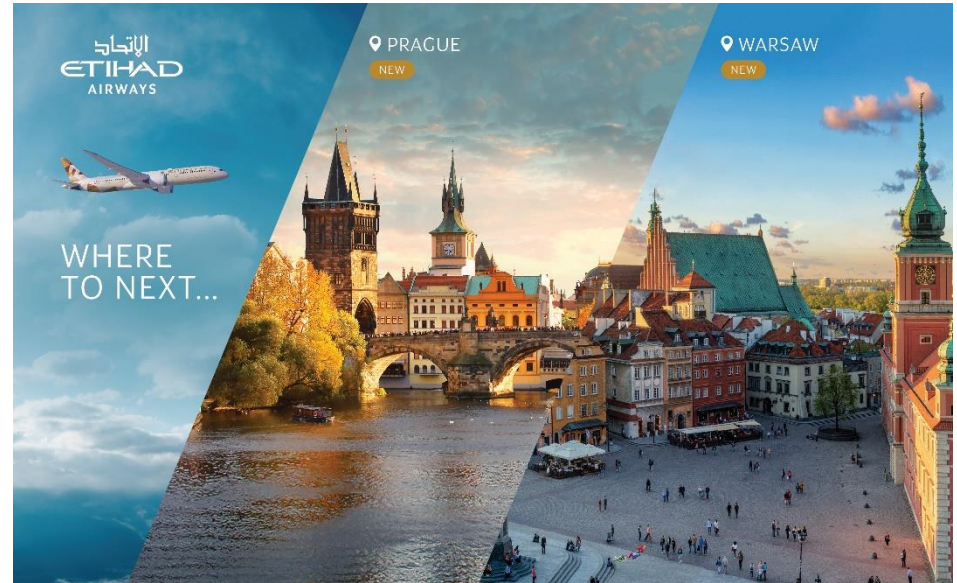
In 2024 1Q-3Q, **28,063** and **17,856** guests arrived from KSA (4.57 days) and UAE (3.70 days) respectively ([Tourdata](#))



Airline Connectivity

Czechia is connected very well in the GCC region through main local airlines

- Emirates Airline
- Etihad Airways (from June 2025)
- Qatar Airways
- Flydubai
- Smartwings
- Air Arabia
- Flynas- seasonal
- Jazeera- seasonal
- Salam Air- seasonal



Key Products promoted in the GCC

- Spa & Wellness
- Family Holiday
- Adventure & Outdoor
- Christmas Markets
- Shopping
- MICE
- Niche experiences – Golf
- Winter Activities



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Prague 18 Jul 2022 23 Jul 2022 1 Room, 2 Adults, 0 Children Search

Search hotel name... Book with free cancellation and get a full refund in case your plans change Filter by free cancellation

Price


- Total for stay
- Avg. price per night

AED 729 AED 32,902

Popular filters

- Free cancellation (409)
- COVID-19 safety info (331)
- Breakfast included (222)

Availability



Augustine, a Luxury Collection Hotel, Prague

★★★★★ Hotel

Letenská 12/33

◆ 2.7 km from city center of Prague

Free Cancellation Breakfast

COVID-19 safety info

Superb 9.5

186 Guest reviews


SAVE 24%

AED 10,674 **AED 8,111**

Total for 5 nights (incl. VAT)

Price includes breakfast

See rooms >



Mandarin Oriental, Prague ★★★★★ Hotel

Nebovidská 458/1

◆ 2.5 km from city center of Prague

Free Cancellation

COVID-19 safety info


Superb 9.5

434 Guest reviews

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Strategy to promote Czechia in the market

Primary Audience

- Family
- Millennials
- Honeymooners
- Wellness



Secondary Audience

- MICE

Strategy to promote Czechia in the market



Market Development - Trade



onata travel



Roadshows

Trade Co-ops

Trade Fams

Trade Workshops

Destination Training

Market Development – Media and PR



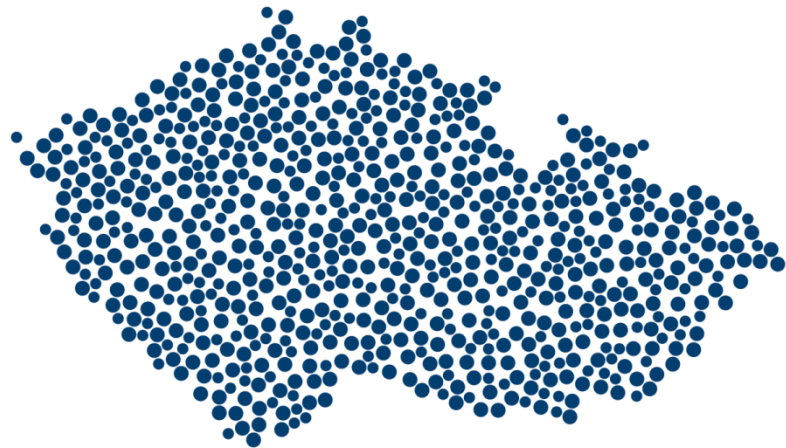
Khaleej Times



Condé Nast
Traveller
MIDDLE EAST



البيان
Al Bayan



Work done in the GCC market- 2024

Unexpected Wellbeing Campaign Launch & Promotions in 2024 – Arab Traveller & Dar Al Khaleej



التشويق - تطلق حملة رافاهية مبتكرة لإعادة تعريفها بالسياحة النشطة
VisitCzechia
 حملة رافاهية غير متوقعة، تهدف إلى تعريف العرب بالسياحة النشطة في التشيك. الحملة تركز على الجوانب الصحية والرفاهية للسياحة، مثل التسلق، ركوب الدراجات، والتجارب الطبيعية. الحملة تستهدف الجمهور العربي في الإمارات، قطر، والسعودية، من خلال وسائل التواصل الاجتماعي، المدونات، والبريد الإلكتروني. الحملة هي جزء من استراتيجية VisitCzechia لتوسيع نطاقها في الشرق الأوسط.



السياحة النشطة في التشيك
 تشيكيا هي وجهة مثالية للسياحة النشطة، مع مجموعة متنوعة من الأنشطة التي تناسب جميع المستويات. من التسلق والتجارب الطبيعية إلى ركوب الدراجات والتجارب الثقافية، تشيكيا توفر كل شيء لتجعل رحلتك مثيرة وممتعة. انضم إلى VisitCzechia لتكتشف المزيد عن السياحة النشطة في التشيك.

منذ انطلاقة الحملة، تم تحقيق نجاحات كبيرة في زيادة الوعي بالسياحة النشطة في التشيك بين الجمهور العربي. الحملة حققت تغطية واسعة في وسائل الإعلام العربية، مما ساهم في جذب المزيد من السياح العرب إلى التشيك. كما تم تعزيز صورة التشيك كوجهة سياحية متنوعة ومتعددة الاستخدامات.



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Coverage Breakdown				
No	Publication	Headline	Date	Reach
1	CEO ME Arabic	لعل تتلحق سياحة التجارب والأنشطة البدنية	4.3.2024	30,000
2	Akhhbar Elysyaha	سياحة تشيك تطلق حملة رافاهية مبتكرة لإعادة التعريف بلقطاع	4.3.2024	56,640
3	Business News ME	هيئة السياحة التشيكية تطلق حملة رافاهية مبتكرة لإعادة التعريف بالسياحة النشطة	4.3.2024	71,280
4	UAE Press Center	هيئة السياحة التشيكية تطلق حملة رافاهية مبتكرة لإعادة التعريف بالسياحة النشطة	4.3.2024	33,430
5	Travel and Markets	VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	11,300
6	Your Press Center	VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	15,300
7	Web Release	#VisitCzechia Launches Innovative Wellbeing Campaign To Redefine Active Tourism	4.3.2024	70,140
8	ME News 247	#VisitCzechia Launches Innovative Wellbeing Campaign To Redefine Active Tourism	4.3.2024	73,020
9	UAE News 247	#VisitCzechia Launches Innovative Wellbeing Campaign To Redefine Active Tourism	4.3.2024	721,530
10	Techit Up ME	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	35,500
11	Zawya	هيئة السياحة التشيكية تطلق حملة رافاهية مبتكرة لإعادة التعريف بالسياحة النشطة	4.3.2024	11,382,390
12	I Heart Emirates	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	19,000
13	Daily Guardian	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	11,000
14	Times of Emirates	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	14,300
15	Maa Gulf	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	47,460
17	Eatn Stays, Arabic	هيئة السياحة التشيكية تطلق حملة رافاهية مبتكرة لإعادة التعريف بالسياحة النشطة	4.3.2024	530,880
18	Eatn Stays, English	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	530,880
19	Executive-bulletin	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	64,770
20	One Ville News	#VisitCzechia's Wellbeing Campaign	4.3.2024	5,000
21	One Ville News, Twitter	VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	22,000
22	Techitup ME, Twitter	Redefine active travel as #VisitCzechia launches an innovative campaign to	4.3.2024	37,000
23	Middle East News 247, Twitter	#VisitCzechia Launches Innovative Wellbeing Campaign to Redefine Active Tourism	4.3.2024	97,000
Total Reach				13,897,820

Participation at Arabian Travel Market, May 2024



9 Czech exhibitors, over 46,000 industry professionals representing over 160 countries, more than 33 000 in 4 days

Participation at Riyadh Travel Fair, May 2024



8 Czech exhibitors, over 30 000 visitors over 3 days

Travel Trade Networking Evening at Czech Embassy, Riyadh, May 2024









9 Czech companies, 55 domestic TO, OTA nad medias


Czechia Travel Trade Day Media and Trade Coverage – 4 TO and 1 media

Czechia

Czechia rolls out the red carpet for Middle Eastern travellers

By Keith J Fernandez | July 2024 | 632

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Czech Republic 16 Jul 2024 20 Jul 2024 1 Room, 2 Adults, 0 Children Search

Star Rating

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- Unrated (54)

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Czechia Spa Fam Trip for Saudi Arabia Agents 2024 (8 TO)



Spa fam trip

August 9. – 14., 2024

Day 1 Friday 9th Aug Tree of Life, **Řečice**

Departure from Riyadh/Jeddah/Dammam
 14:30 Arrival to Prague, meeting Barbara Abdolov
 Transfer from Prague Airport to Lázně **Řečice** – **Tree of Life**, a unique rehabilitation and spa centre in the heart of nature
 16:00 Accommodation at the **Tree of Life**
 Side inspection and treatments, free time
 Dinner at the Tree of Life



Time:
 GMT+1 (Central European Time)

Communication:
 The representative access code for the Czech Republic is +420

Currency:
 Czech Koruna (CZK)
 1 USD = 23.7 CZK
 1 EUR = 22.2 CZK

Language:
 Czech (with a few)

Consent:
 Consent to participate in the trip
 +420 721 541 018

Day 2, Saturday 10th Lázně **Řečice** + **Teplice**

Breakfast at the hotel
 Visit **Institute of Comprehensive Rehabilitation in Lázně Řečice**
 Lunch at the Tree of Life
 14:00 transfer to Teplice (approx. 2.5 hours)
 17:00 Accommodation at the **spa hotel Beethoven**
 Site inspection of **Lázně Teplice** and free time for wellness
 20:00 Dinner at the **Café Restaurant Beethoven**

Day 3, Sunday 11th Teplice + **Jáchymov** + **Mariánské Lázně**

Breakfast at the hotel
 09:30 transfer to **Jáchymov** (approx. 1.5 hours)
 Site inspection **Radium Palace Hotel** + presentation of radon therapy
 Lunch in **Jáchymov**.

After lunch transfer to **Mariánské Lázně** (approx. 1.5h) Preliminary time of arrival to **Mariánské Lázně** 15:30
 Accommodation **Falkensteiner Spa Resort Mariánské Lázně**
 Site inspection and free time for wellness
 Dinner at the hotel **Falkensteiner**



Day 4, Monday 12th Mariánské Lázně + **Karlovy Vary**

Breakfast at the hotel **Falkensteiner**
 9:00 Transfer to **Zlatá Huť**, site inspection **Želví Lázně, Diana Spa, Želví Lázně**
 11:00 Transfer from **Želví Lázně** to **Karlovy Vary** (approx. 1h)
 Check in **Thermal**
 12:30 Walking city tour with lunch at the Diana
 Afternoon site inspection of **Thermal** and free time for **Spa**
 Dinner at the **Thermal**



Day 5, Tuesday 13th Karlovy Vary + **Prague**

9:00 after breakfast check out and transfer to **Grandhotel Pupp** for site inspection (approx. 15min)
 10:30 transfer to Prague (approx. 2.5h), check in **The Mirror**
 13:30 transfer for lunch to the **Jaffa Restaurant** (end of minibuses transport services)
 Guided city tour with shopping at the end – transfer from city to the biggest Outlet shop in Prague **Fashion arena**. Side inspection of VIP premises and praying room, free time.
 19:00 dinner at the **Fashion Arena Outlet** shopping afterwards transfer to the hotel.

Day 6, Wednesday 14th

Breakfast at the hotel
 Check-out (luggage at the hotel storeroom) and free time
 12:30 transfer to Prague airport for departure at 13:30

Important information

- CzechTourism is not responsible for possible accidents and injuries of tour participants, does not reimburse them for travel insurance or related costs.
- Accommodation, transfers, meals and other activities listed in the program are covered. Other additional costs such as the use of taxis, minibuses, alcohol etc. are not covered by the organizer.
- CzechTourism reserves the right to change the program due to the current situation.

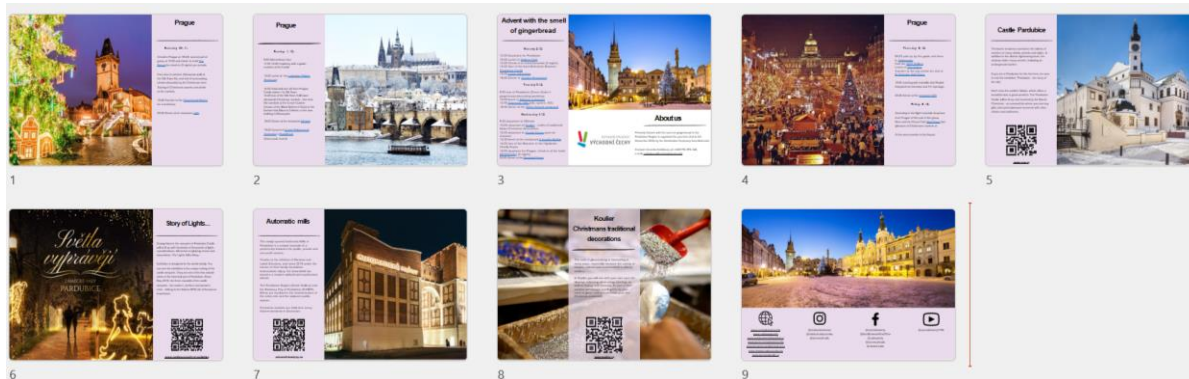
More information about the Czech Republic

www.visitczechia.com
www.visitczechia.com Karlovy Vary Region

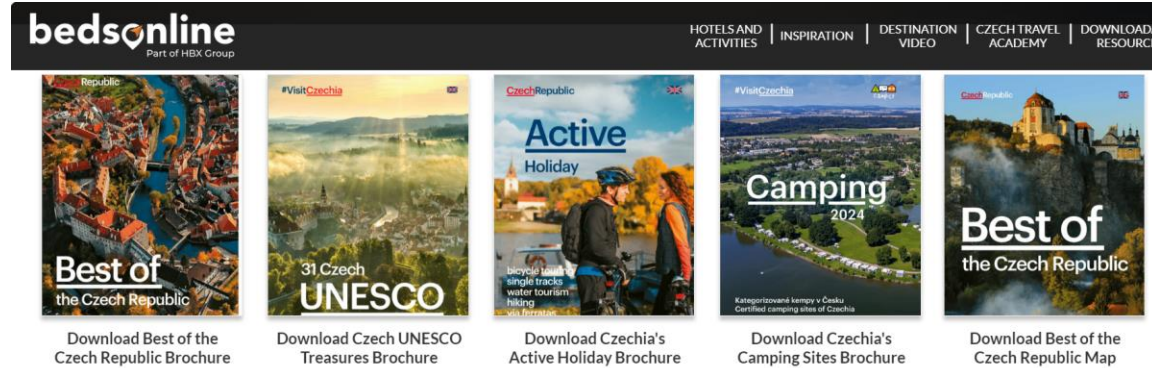


#VisitCzechia

Czechia Advent Press Trip from GCC 2024 (4 media, 2 influencers)



Hotel Beds B2B Campaign 2024



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- 31 Czech UNESCO**
Download Czech UNESCO Treasures Brochure
- Active Holiday**
Download Czechia's Active Holiday Brochure
- Camping 2024**
Download Czechia's Camping Sites Brochure
- Best of the Czech Republic**
Download Best of the Czech Republic Map

- Timeline: June to Aug 2024
- Markets: GCC markets
- Audience: +8.000 travel advisors in GCC on our retail platform Bedsonline.com
- PAX increase to Czechia: 2.500 PAX. This is +25% versus 2023 record year.



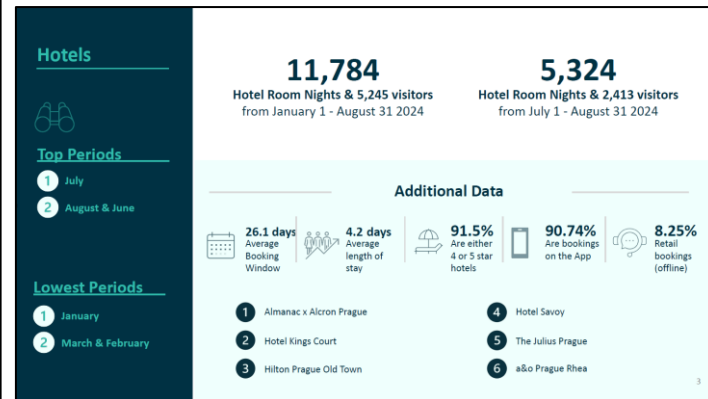
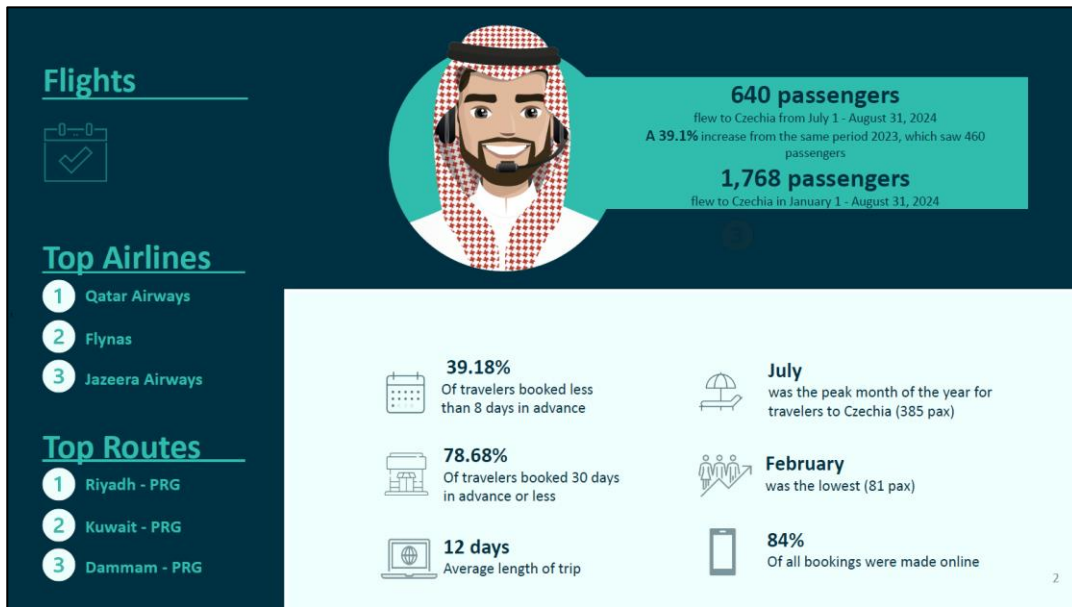
Wego Middle East Digital Campaign 2024



Deliverables:

- On Wego Display Ads (Web and App): 600,000 impressions
- Off Wego Display Ads (Web): 142,857 impressions
- Social Media: Image/Video Posts 700,000 impressions
- EDMs: 1 Email 300,000 impressions
- Article: 2 Articles
- PR Campaign

Czechia Campaign with Al Mosafer, Saudi Arabia



Czechia Campaign with AI Musafir.com, UAE



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Featured Packages:

- AirArabia: Fly from Abu Dhabi
- Czech Republic Packages: Your Czech Adventure Awaits...**
- Innsbruck Tour Packages: Explore Innsbruck...

From AED 7,099

From AED 3,499

Carousel

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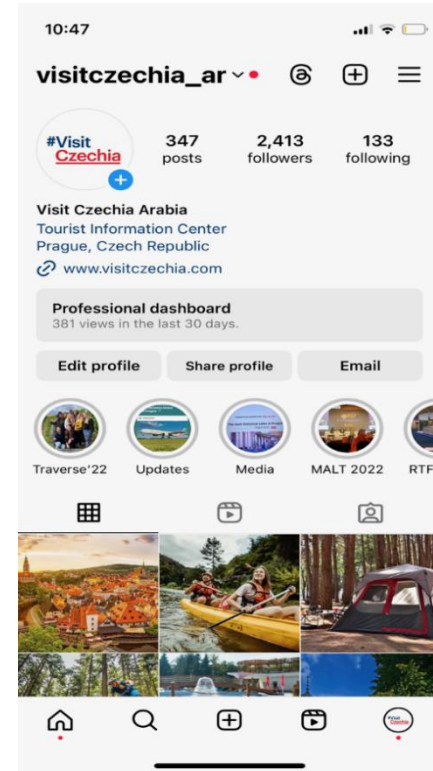
Public Relations and Social Media Amplification in Middle East



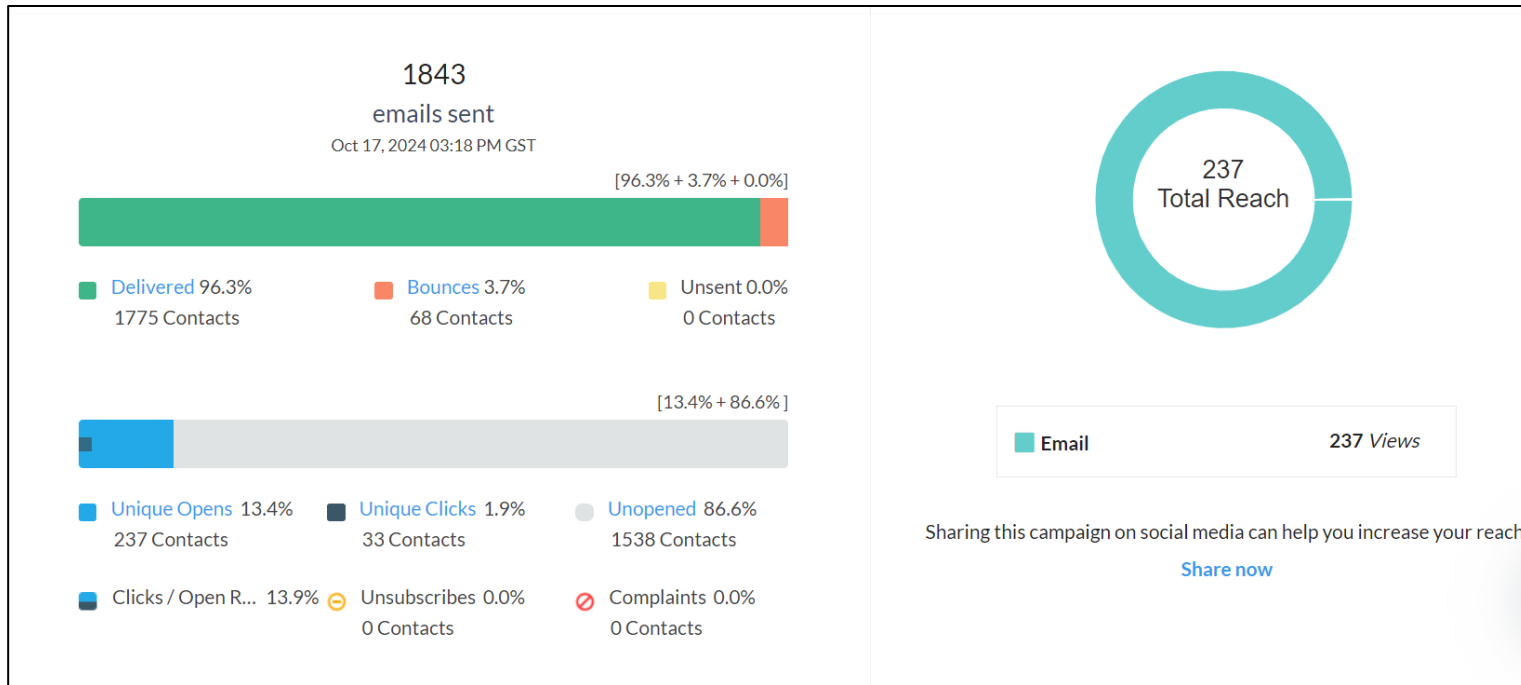
Czechia Prepares for Record-Breaking Tourism Season in 2024

Czech Tourist Authority, 24 July 2024– Czechia is gearing up for another remarkable tourism season, set to surpass last year's record-breaking visitor numbers. With over 22 million tourists in 2023, this year promises even greater numbers, strengthening the country's status as a premier European destination. Prague, the capital city, is at the heart of this tourism boom, attracting visitors from all over the world with its rich history, stunning architecture, and vibrant cultural scene.

Throughout July and August, Prague anticipates welcoming over 1.5 million tourists, marking a significant increase from previous years and underscoring its growing charm as a must-visit city in Europe. Visitors flock to Prague not only for its iconic landmarks such as Prague Castle and Charles Bridge but also for its dynamic arts scene, bustling markets, and world-class dining options.



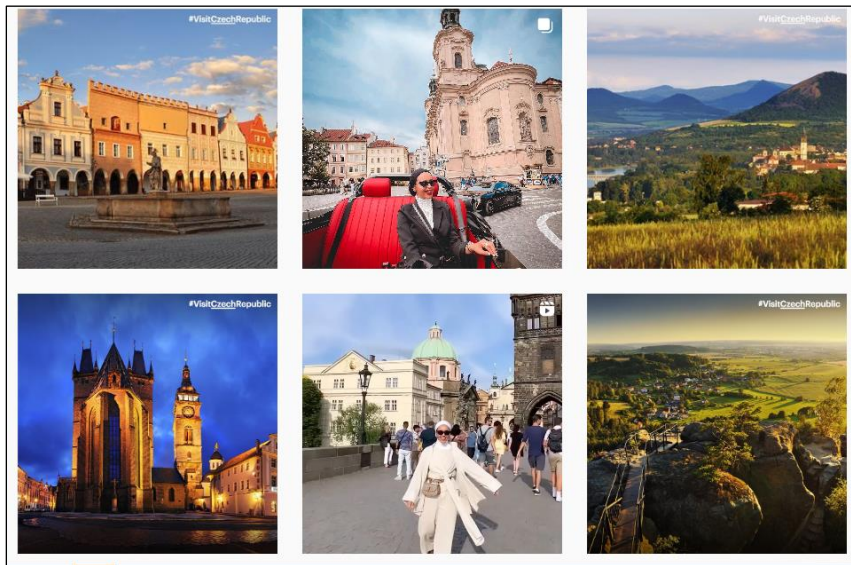
#VisitCzechia Monthly Trade Newsletters



Social Media



1,824 IG followers



Ads	Artwork	Delivery level	Platform	Attribution setting	Result type	Results	Reach	Impressions
Czech awareness; New Traffic Ad		ad	instagram	7-day click or 1-day view	views		105090	135035
New Traffic Ad - Copy		ad	instagram	7-day click or 1-day view	Link clicks	162	54241	71007
New Traffic Ad - Copy		ad	instagram	7-day click or 1-day view	Link clicks	158	51521	57029
New Traffic Ad		ad	instagram	7-day click or 1-day view	Link clicks	176	39744	52031
New Traffic Ad - Copy		ad	instagram	7-day click or 1-day view	Link clicks	97	44977	49299
New Traffic Ad		ad	instagram	7-day click or 1-day view	Link clicks	140	32249	45774

Upcoming Activities for 2025 (budget 3,5 mil CZK)

Appointment of Czech Tourism Representation office in Middle East, Israel, India

- February 2025

Czechia Roadshow Qatar, Kuwait, Oman

- 7 April – 11 April 2025

Arabian Travel Market + B2B workshop (V4)

- 28 April – 1 May 2025

B2B workshop in Riyadh (V4)

- preliminary 4 May 2025

Fam/PressTrips and OTA campaigns

- Q2 – Q4 2025 Dates TBC

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