



WANDERLUST

10 Proven Interventions for GCC Destinations to Unlock Priority Source Markets

Tourism is more than just an economic driver—it is a bridge between cultures and a source of personal enrichment and connection. The familiar phrase, “Travel is the only thing you buy that makes you richer”, rings especially true today, as travellers from across the globe continue to prioritize tourism despite rising costs and global challenges.

As destinations navigate a rapidly evolving and increasingly competitive travel landscape, unlocking opportunities in source markets (places and countries that send tourists) requires more than broad outreach—it requires a targeted approach focused on tailored experiences, facilitated accessibility, and effective marketing. Simultaneously, it is essential to stay attuned to global travel segments and overarching industry trends, which provide valuable context and direction for shaping destination strategies.

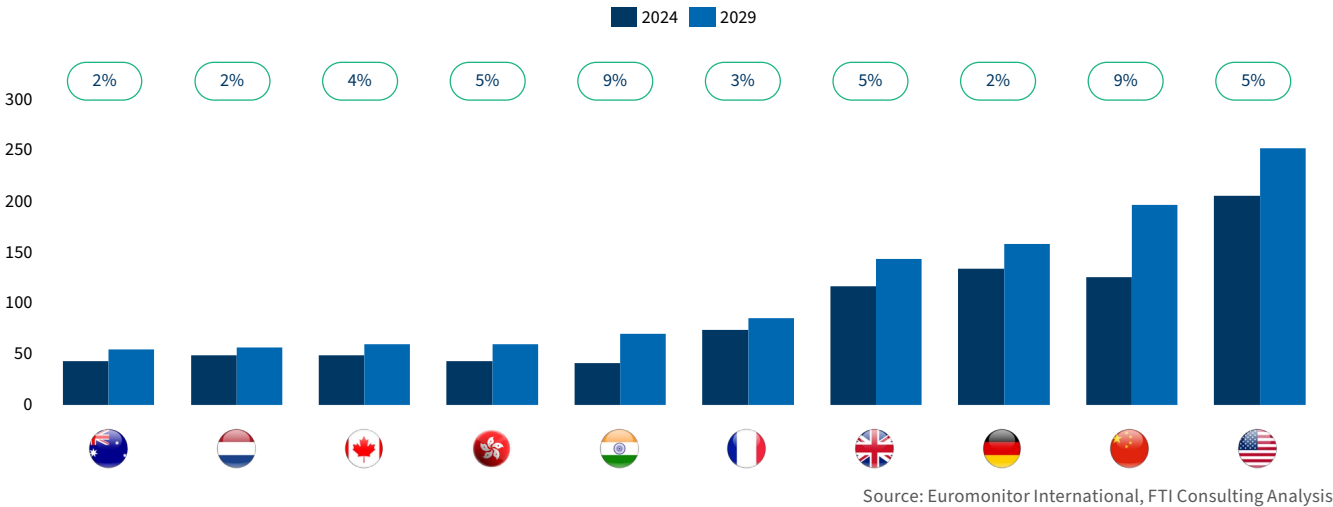
This paper outlines practical strategies for GCC destinations to unlock source markets by aligning tourism efforts with the expectations, behaviors and preferences of target travellers.

Global Outbound Tourism Landscape

International tourism is rebounding strongly following the COVID-19 pandemic, with 1.5 billion trips and a record USD 1.9 trillion in traveller spending in 2024.¹ In 2023, Reuters reported that the tourism sector grew by 12.1% year-on-year—significantly outpacing the global economy’s 2.7% growth—highlighting the industry’s resilience and enduring appeal as travellers continue to seek meaningful global experiences.

Looking ahead, global tourism spend is projected to grow at a 5.4% CAGR through 2029—more than double the pre-pandemic rate of 2.5%. As highlighted in Figure 1, the top five outbound markets (USA, Germany, China, UK, and France) will contribute 35% of global spend, while China and India lead growth at 9% annually, driven by renewed air capacity and rising middle-class travel demand, respectively.

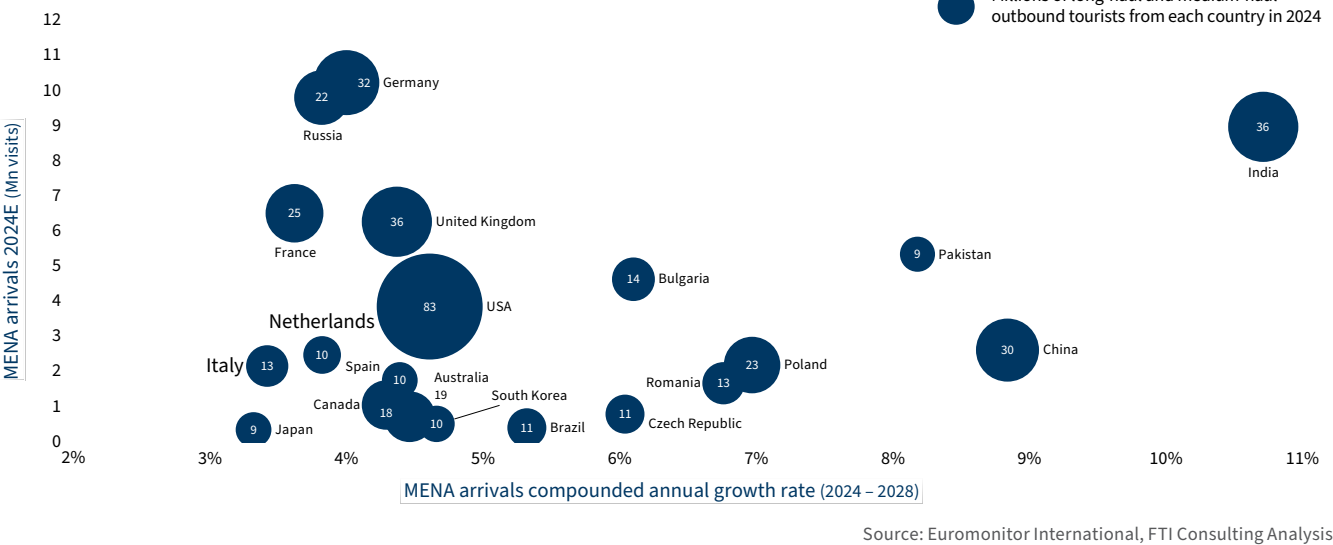
FIGURE 1: TOP 10 SOURCE MARKETS FOR OUTBOUND TOURISM SPENDING 2024-2029
(2024E-2029F, in USD BILLION)



Outbound Travel to the MENA Region

Unlocking tourism potential in MENA requires understanding both volume and growth momentum. Germany, Russia and India are the top source markets by arrivals, while India and China are the fastest-growing, with annual growth rates of 11% and 9%.² MENA attracts a large share of outbound travel from nearby markets like Pakistan, Russia and India, but remains less penetrated in distant markets such as the US, Brazil and Japan—reflecting ongoing accessibility and awareness challenges.

FIGURE 2: MENA ARRIVALS 2024 VOLUME AND 2024-2028 ANNUAL GROWTH RATE



What Matters to Outbound Travellers?

Understanding traveller priorities is essential for designing effective tourism strategies. Globally, travellers tend to prioritize value for money, relaxation and safety, followed by interest in nature, all-inclusive options, quality dining and cultural experiences.³ However, these preferences can vary significantly across different dimensions—particularly by generation and region.

Generational differences are notable: Baby Boomers emphasize affordability, Millennials and Gen X favor family-friendly and all-inclusive options, while Gen Z seeks personalized and unique experiences—often supported financially by parents. Regional variations are equally important. For example, MMGY Global’s data shows that Japanese travellers are budget-conscious, Indian travellers are driven by the desire to explore new destinations, and Chinese travellers prioritize special events and cultural familiarity.⁴ Recognizing these nuances enables destinations to better tailor their strategies to meet the distinct expectations of different traveller segments across source markets.

Unlocking Source Markets: 10 Key Interventions

Unlocking priority source has become increasingly demanding, requiring tailored, seamless and culturally relevant strategies that resonate with travellers' expectations. The WANDERLUST framework introduces 10 targeted interventions designed to help destinations meet these demands and drive meaningful, market-specific growth.

1. Welcome priority source market preferences with curated, relevant experiences

Tourism destinations must recognize that source markets differ widely in their travel preferences, and that effectively attracting visitors requires a nuanced, market-specific approach. Understanding these differences is not only essential for tailoring offerings that resonate with each traveller profile—it also helps determine whether a source market should be prioritized in the first place.

As a one-size-fits-all approach is no longer effective—destinations must adapt their positioning and offerings to align with the unique motivations and expectations of each source market.

For example, prioritizing the Chinese market calls for a fundamentally different strategy than prioritizing French travellers. Chinese tourists typically seek modern, high-end experiences that combine luxury shopping, iconic landmarks and seamless infrastructure. Cities like Paris, Milan and Dubai are especially attractive to Chinese tourists for their global fashion hubs, prestigious hotels and polished urban appeal. In contrast, French travellers tend to value authenticity, cultural depth and local charm. They are drawn to immersive experiences that emphasize heritage, gastronomy and slower-paced exploration—favoring destinations like the Italian countryside, Morocco's historic medinas, or Japan's traditional towns, where they can connect meaningfully with local culture and cuisine (~10 million French tourists to these destinations in 2024).⁵

Even when source markets share similar tourism preferences—such as sun and beach tourism—the specifics of what travellers are looking for can diverge. For example, UK tourists tend to favor budget-friendly, familiar beach holidays with family amenities, often in Spain or Portugal, while Russian tourists seek exclusive, luxury beachfront experiences with longer stays, favoring destinations like Turkey, UAE, or the Maldives. These differences shape not just where tourists go, but also how destinations must position themselves and curate offerings to meet expectations accordingly.

GCC destinations are beginning to tailor their offerings to priority source market-specific preferences—such as the UAE's luxury-focused approach for Chinese travellers and its high-end beach experiences for Russian and European tourists, and Oman's eco-cultural positioning for experience-driven Europeans. The path forward for GCC destinations lies in using insights from priority source markets to create offerings that are not only aligned with traveller expectations but also reflect the unique character and potential of each destination. – whether it's luxury coastal retreats, desert-based adventure tourism or culturally immersive heritage trails.

2. Acknowledge and celebrate cultural nuances through source market dedicated offerings

Leading destinations increasingly integrate cultural elements from key source markets—such as China and India—into permanent and pop-up experiences to build emotional connections with travellers. Examples like Bollywood Parks Dubai, Dubai Mall's Chinatown and Switzerland's Festival of India show how culturally immersive offerings foster familiarity, respect and repeat visitation. In parallel, globally themed events like Oktoberfest in Brazil and the U.S., and American Day in Japan, attract large, diverse audiences by creating shared moments of cultural celebration. These approaches highlight the importance of blending source-market familiarity with globally resonant events to create a stronger emotional connection, driving both first-time visits and repeat demand.

Attracting film and television productions tied to specific source markets is a powerful strategy to boost tourism, as it builds emotional connections and showcases destinations in a relatable way. Switzerland's popularity among Indian tourists has been reinforced by over 200 Bollywood films shot there, while Thailand saw a 66% surge in Chinese arrivals after the release of *Lost in Thailand*. Such productions can significantly increase visibility, trigger travel interest and drive sustained growth from target markets.

The UAE has taken the lead in the GCC for localizing offerings. Dragon Mart in Dubai is the largest Chinese retail trading hub outside mainland China, while the newly opened BAPS Hindu Mandir in Abu Dhabi serves as a major cultural landmark for Indian travellers. Other GCC destinations can leverage their multicultural appeal and event infrastructure to deliver immersive, source market-specific experiences. By collaborating across the region—through joint festivals or multi-location film productions—they can strengthen emotional connections and position the GCC as a unified, culturally attuned tourism destination.

3. Nurture the tourism workforce with market-specific cultural knowledge and skills

Tourism staff plays a vital role in shaping the visitor experience, and having a culturally aware workforce is essential to meeting the expectations of travellers from diverse source markets. Certain markets, such as China and India, tend to have more distinct traveller expectations and cultural nuances that benefit from thoughtful consideration and tailored engagement. From language preferences to cultural sensitivities, well-trained staff can significantly boost visitor satisfaction and destination appeal.

Governments are increasingly recognizing this need and investing in workforce training tailored to priority markets. Programs like Azerbaijan's "China Ready" and Australia's "India Ready" illustrate how national initiatives can build cultural awareness and equip tourism professionals to deliver personalized experiences that resonate with travellers from China, India and beyond.

The private and third sectors (charities, non-governmental organizations (NGOs), social enterprises, and other non-profit organizations) are also stepping up. For example, some U.S.-based hotel chains have introduced training to address the preferences of Middle Eastern and Latin American travellers, including dining options, privacy considerations and bilingual support.⁶ These efforts ensure comfort, respect and relevance for travellers—strengthening emotional connection and encouraging repeat visitation from key markets.

GCC countries have initiated targeted source market training programs. For instance, the "Dubai Way" platform offers courses like "Chinese Traveller Standards," equipping frontline staff with the knowledge to cater effectively to Chinese visitors. However, given the distinct service expectations of key GCC source markets like India, China and Russia, GCC destinations should develop and expand targeted workforce training programs that equip frontline tourism staff with the cultural awareness and practical skills to deliver market-specific, quality experiences.

4. Design seamless payment experiences tailored to visitor expectations

As travel becomes more digital, offering seamless and flexible payment options is key to meeting traveller expectations. Preferences differ by market, with rising use of digital wallets and multi-currency platforms in places like India, Hong Kong and Singapore. Destinations that accommodate these diverse payment methods are able to stay ahead of evolving travel trends.

Additionally, aligning with the specific payment preferences of major source markets—such as US (AMEX cards), China

(WeChat Pay, Alipay), India (UPI, Paytm) and South Korea (Naver Pay, KakaoPay)—is crucial for enhancing destination appeal and traveller satisfaction. Destinations like the UAE, Singapore and Malaysia have taken proactive steps to integrate these systems, simplifying transactions and building trust with key markets.

As certain efforts are already being conducted, GCC countries should continue integrating preferred payment platforms from key source markets across tourism touchpoints to offer a seamless, trusted experience that meets traveller expectations and strengthens competitiveness.

5. Ease entry barriers by simplifying visa policies and processes

Visas are essential for security and regulation, but overly complex policies can discourage potential tourists and limit a destination's competitiveness. Studies by UNWTO and WTTC show that visa facilitation can increase tourist arrivals by 5–25% annually,⁷ as seen in ASEAN, where targeted reforms were projected to add millions of visitors and generate substantial economic benefits. Striking a balance between security and accessibility is key to unlocking global travel potential.

There are four primary approaches to streamline visa policies and processes, as highlighted by the UNWTO and WTTC:

1. Improving access to clear, multilingual information via credible channels
2. Using digital tools to simplify application steps
3. Offering flexible treatment for specific traveller segments like cruise or charter groups
4. Establishing regional agreements to enable easier cross-border movement

Several case studies evidence the positive impact of visa simplification measures on inbound tourism. For example, Azerbaijan's launch of the ASAN eVisa system in 2017 enabled Indian travellers to obtain visas within three days—contributing to a fivefold increase in Indian tourist arrivals by 2019.

Similarly, Greece initiated Visa-on-Arrival program for Turkish Nationals in April 2024, allowing Turkish citizens to visit select Greek islands without a full Schengen visa. By March 2025, over 100,000 visas had been issued under this scheme, significantly increasing Turkish tourist arrivals to these islands.

Additionally, bi-lateral visa waivers like the 2009 agreement between China and Russia for short-duration visits have substantially boosted tourism in both directions, with Hong

Kong seeing a 133% increase in Russian visitors and Russia observing a 184% growth in arrivals from Hong Kong.

GCC countries have made strides in visa reform—In the past years, Saudi Arabia expanded its e-visa program to over 60 countries, Qatar allows visa-free entry to nationals from 102 countries and Oman grants 14-day visa-free stays to over 100 nationalities. Despite this progress, some GCC visa processes remain relatively pricey, complex or allow only single entries. To stay competitive, the region should continue digitizing and harmonizing visa systems, especially for key markets like India and China. Additionally, introducing a unified GCC-wide tourist visa—already in development under the “GCC Grand Tours” initiative—would position the region as a seamless, multi-country travel destination.

6. Reinforce air connectivity to source markets, with expanded capacity, routes and affordability

Air connectivity is a key factor in destination choice, with 85% of travellers from key APAC markets prioritizing destinations with direct flights according to MMGY Travel Intelligence. Expanding routes and increasing flight capacity have driven strong results—for example, Azerbaijan doubled Chinese arrivals with a new Baku-Beijing flight, and Vietnam saw record Indian arrivals after boosting connectivity.

Additionally, low-cost carriers (LCCs) have emerged as game-changers, reshaping the air travel landscape. LLCs now account for a third of global air travel, offering affordable, efficient options that appeal to budget-conscious and sustainability-minded travellers.

For example, Wizz Air Abu Dhabi has significantly boosted affordable travel between the GCC and Europe. In 2024, it operated 19,000+ flights, carried 3.5 million passengers and brought 1.2 million international visitors to Abu Dhabi—contributing 25% to the airport’s point-to-point traffic. Its expanding network to European cities like Belgrade, Larnaca and Tirana underscores its role in strengthening Abu Dhabi’s position as a key tourism hub. With a projected market value of \$440 billion⁸ by 2030 according to Capitol Technology University, LCCs are set to play a key role in making travel more accessible worldwide.

While other GCC countries have established low-cost carriers—such as Flynas in Saudi Arabia and SalamAir in Oman—their networks remain largely focused on the Middle East and Asia. To address gaps in long-haul affordability (particularly to US and Europe), GCC countries should adopt a coordinated air connectivity strategy that expands direct routes and seat capacity from priority markets, while partnering with international LCCs from

Europe and Asia, as demonstrated successfully by Abu Dhabi and Wizz Air partnership.

7. Leverage non-traditional travel partnerships within source markets to expand visitor reach

Traditional partnerships with Tour Operators (TOs), Traditional and Online Travel Agencies (OTAs) and Destination Management Companies (DMCs) remain foundational, with major players like Booking Holdings and Expedia controlling 42% of global OTA bookings.⁹ The travel trade landscape also differs from country to country. In some cases, like India, unlocking the market requires partnering with hundreds of fragmented TOs and TAs, while in more consolidated markets like Germany or France, working with a few dominant operators can provide broader reach.

However, reaching untapped visitor segments requires destinations to go beyond traditional channels and pursue innovative partnerships—particularly those that cater to niche markets and leverage technology to deepen engagement. Expanding collaboration to specialized non-tourism players enables destinations to tap into high-value markets. Thailand, for example, is attracting Indian wedding tourism by partnering with planners in Mumbai and New Delhi, capitalizing on multi-day events that generate significant tourism revenue. Similarly, NEOM’s Sindalah Island in Saudi Arabia partnered with Burgess to position itself as a luxury yachting hub, offering high-end services to attract affluent travellers.

Collaborations with tech powerhouses take this strategy a step further by leveraging technology to deepen consumer insights, integrate into travellers’ daily lives and broaden destination reach. For instance, Tourism New Zealand’s WeChat Mini Program with Tencent delivers tailored content to Chinese tourists, while Singapore has partnered with Alibaba and PhonePe to enhance marketing precision, travel payments and in-market experience for Chinese and Indian visitors.

GCC destinations can expand partnerships with specialized providers—such as luxury yacht charter companies, retail groups and travel tech firms—to accelerate growth in high-potential segments like yachting, shopping, wellness and experiential tourism, aligning with evolving traveller demand and the region’s long-term diversification goals.

8. Upgrade the path to purchase with immersive, localized digital tools

As digital preferences evolve, younger generations—particularly Gen Z and Millennials—are reshaping how travel is researched and booked, driving demand for seamless, tech-enabled experiences that blend physical and digital touchpoints.

By 2024, 67% of travellers globally are expected to book online.¹⁰ In regions such as APAC, the appetite for immersive tools is especially strong: 40% of travellers use AR/VR to preview destinations and 33% to tour hotel rooms, highlighting the growing need for visual and interactive content.¹¹

To meet these expectations, destinations are turning to AI and immersive technologies to personalize and enrich the travel journey. For instance, Thomas Cook introduced immersive 360-degree VR films in select UK, Germany and Belgium locations, allowing customers to experience destinations virtually before booking. Similarly, virtual content such as Switzerland’s live-streamed Alps via Alibaba Taobao and Visit Sweden’s 13-hour Northern Lights stream on WeChat are capturing interest from tech-savvy audiences and sustaining destination awareness—even during travel restrictions.

Equally important is the use of source market-specific digital platforms to deepen engagement. Initiatives like Singapore’s MICE MiniProgram, Italy’s interactive Chinese WeChat map and New Zealand’s China-focused microsite demonstrate how digital tools tailored to local behaviors can drive conversion, referrals and long-term destination appeal.

While GCC tourism efforts remain more focused on traditional marketing channels, there is a clear opportunity to scale up the use of immersive and AI-powered technologies—such as AR/VR previews, personalized planning tools and localized digital platforms—to engage travellers from key markets and convert interest into bookings across the digital journey.

9. Showcase destinations with real and virtual ambassadors relevant to source markets

Celebrity influencers are a powerful asset in destination marketing, combining relatability and aspirational appeal to shape traveller perceptions across global markets. While long-term ambassadors help build sustained brand association and credibility—such as Chris Hemsworth for the UAE or David Beckham for Qatar—short-term campaign guests like Penélope Cruz or Jennifer Aniston for Emirates support high-impact brand-specific promotions like Emirates Airlines.

While Hollywood stars often carry global appeal—frequently used in Western campaigns to target broad international audiences—travellers in APAC markets, such as India and China, tend to respond more strongly to country-specific celebrities who reflect local culture and

values. Campaigns like Abu Dhabi’s “Can’t Wait to Winter,” which featured Bollywood actor Ranveer Singh for India and Liu Yifei for China, demonstrate how culturally relevant endorsements can boost engagement and reinforce destination appeal within a specific market.

An emerging trend is the use of virtual idols to connect with younger, tech-savvy travellers through AI-driven storytelling. Campaigns like Lufthansa’s virtual livestream on Bilibili and Australia’s animated duo “Ruby and Louie” highlight how destinations can even use virtual personas to spark interest.

The GCC has been highly effective in attracting global ambassadors with broad appeal—such as Cristiano Ronaldo in Saudi Arabia and Ryan Reynolds in the UAE—boosting the region’s visibility on the world stage. At the same time, GCC countries are increasingly engaging country-specific stars to connect with key markets on a deeper cultural level. Maintaining this dual approach will be essential to resonating with diverse audiences and unlocking new tourism demand.

10. Time campaigns around source market holidays and travel preferences

Aligning campaigns with source market holidays and cultural preferences is key to capturing peak travel demand and driving conversion as travellers often plan trips around distinct seasonal breaks and festivals, creating clear windows for targeted promotions. Popular travel periods include Thanksgiving in the U.S., Christmas and New Year in the UK, China’s Golden Week and Spring Festival, India’s Diwali and summer holidays and Japan’s Golden Week and Autumn Equinox.

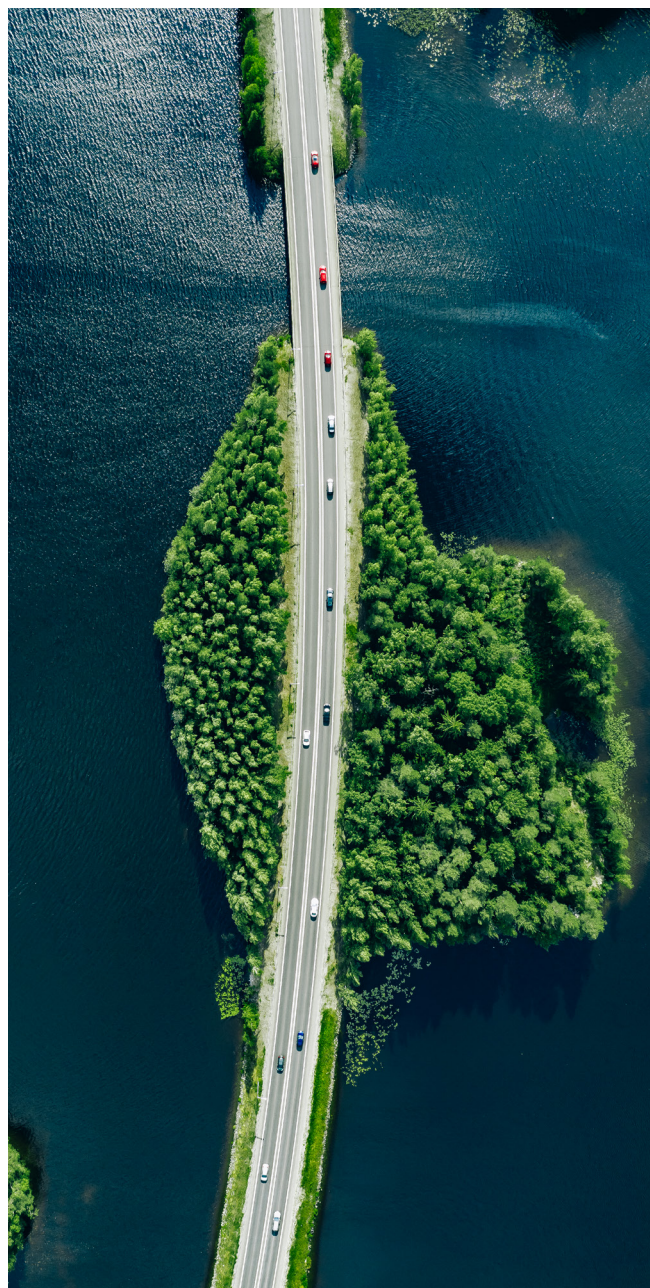
While GCC destinations have begun aligning their marketing calendars with key source market holidays, there is an opportunity to take this further by creating in-destination events and experiences—such as Chinese New Year celebrations or Diwali festivals—that coincide with these peak travel periods. This approach can deepen cultural relevance and attract travellers looking to celebrate abroad. Additionally, the GCC’s mild winter climate, particularly in destinations like Dubai, makes it an ideal escape during the holiday seasons in the U.S. and UK, offering a compelling backdrop for seasonal excursions and tailored experiences.

Conclusion

In an increasingly competitive global tourism market, broad and generic marketing efforts are no longer sufficient. To effectively capture demand from priority source markets, destinations must adopt a more strategic approach—delivering personalized, seamless and culturally attuned experiences that resonate with today's diverse and discerning traveller. Together, the above ten interventions form the WANDERLUST framework—a practical roadmap for GCC destinations to unlock demand and deepen travellers' engagement in key source markets.

To bring this framework to life, strong national enablers are essential—including supportive regulations, targeted investment incentives, strategic partnerships with local and international tourism organizations, advanced travel and digital infrastructure, and coordinated workforce development. Equally important is strong governance and cross-sector collaboration between government and industry partners to ensure agility and alignment.

But beyond strategy, tourism remains a force for connection. When destinations align with the spirit of today's traveller—curious, connected and culturally aware—they do more than attract visitors; they create lasting bonds. With the right national enablers and the WANDERLUST framework in place, GCC countries are well-positioned to turn global curiosity into sustainable tourism growth. After all, wanderlust is more than a framework—it captures the very reason people travel: to explore, connect and feel a sense of belonging.



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