

**DUBAI TO VICTORIA:  
AN EXPLORATORY STUDY OF EMIRATIS  
AND EXPATRIATES**

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## **ABSTRACT**

This research investigates the perception of residents of Dubai, United Arab Emirates (UAE) towards the state of Victoria, Australia as a destination and assesses their knowledge of Victoria's tourism attributes. Focus groups were undertaken with UAE nationals (referred to as Emiratis) and with expatriate residents. In the case of the former group it was found that the previous travel experiences of most respondents involved travelling in family groups with the wife and mother making the key travel-related decisions. The responses appeared to be broadly representative of attitudes prevalent more widely within **their** relevant families. Of the expatriate respondents, all were experienced travellers who had previously visited Australia. A further focus group was comprised of travel agents. All but one had previously visited Australia.

**Key Words: United Arab Emirates, Emiratis, Victoria Inbound, Middle East**

## **BACKGROUND**

The UAE has emerged as an important trading partner for Australia and it has been reported that over 120 Australian companies are established there (Michael and Beeton, 2007). The UAE is Australia's second largest Middle Eastern export market and trading activity involves an increasing range of goods and services across many industries (<http://www.abig-uae.com/trademessage.htm>). This paper is the outcome of a collaboration between researchers in Melbourne, Australia, and Dubai and was prompted by an awareness that government tourism commissions at both a state and commonwealth level in Australia are increasingly aware of the need to understand key Middle-East source markets.

## **OBJECTIVES**

This paper explores the development of the immature but rapidly growing outbound travel market from the UAE to Australia generally and to the State of Victoria in particular and the tourism behaviours, attitudes and decision-making of both Emiratis and expatriate tourists. The views of travel agency owners/managers were investigated in their capacity as key intermediaries towards consumer destination choices, motivations and experiences. Finally, Emiratis and expatriates were asked about the arrangements that they make for travel-related services such as insurance and Australian visas and whether they found this process user-friendly or not.

## **LITERATURE REVIEW**

Tourism to Australia from the Gulf countries to Australia has been increasing at an annual rate of 11.6 percent (Tourism Australia, 2006). A visitor analysis conducted in 2004 concluded that tourists from the Gulf have a high average trip duration (34 nights compared with an average of 27 for all international visitors), high average spend and large average party size (Tourism Australia, 2006). Over the period 2004 – 2006, the Middle East, including UAE, was the world's second fastest growing tourism region after China. A study conducted by the United Nations World Tourism Organisation (UNWTO) in 2004 identified spending of \$12 billion on overseas travel by Arab tourists originating from the nations of the Gulf Co-operation Council (GCC) nations. UAE travellers accounted for over \$4.9 billion of this total, an average of \$1,700 per trip, about \$500 more than average spending by European travellers (Michael and Beeton, 2007).

Travel and Hotel Management magazine published a study in 2008 on the expenditure trends of tourists who vacation in Turkey. The study reveals that tourists from North America, Germany and Arab countries do a lot of shopping and thus spend a lot whereas tourists from Britain, Russia, Spain and Israel spend comparatively less. According to the magazine, Arab tourists, who are famous for their high-spending shopping habits, tend to purchase luxury items such as jewels while in Turkey.

A study conducted by the Government of Malaysia concluded that visitation by Arab tourists was likely to increase by 58 percent in 2005 over the previous year, indicative of rapid growth in this market. (Michael and Beeton, 2007). Consistent with the findings of other studies about Australia inbound travel, the study concluded that Arab tourists stay longer on average and spend more than other visitors. The holiday related expenditures of Arab tourists in Malaysia amounted to \$155 million in 2004. For Malaysian tourism officials, Arab Gulf tourists are among the “quality tourists” who spend an average of U.S. \$ 1,200 per visit and stay an average of eight room nights compared to the average tourist who spends U.S. \$ 700 and stays 6.7 room nights (Sulaiman, 2008). Recent figures have shown that Malaysia is a growing tourism destination for Emiratis, though the flows are not equally balanced. In 2007 the country received 40,000 visitors from the UAE, while 5,600 Malaysians visited the UAE (Anonymous, 2008).

Travel from the UAE to Victoria is an example of an immature but rapidly growing market. A study by King and Choi examined the Korea to Australia market during the early development and examined the applicable industry structure (1999). Another paper examined perceptions of Victoria within the wider Australian context among the Korean travel industry (King and Choi, 1997). It was found that though attractive, Victoria had the characteristics of a secondary market and was constrained by the absence of direct flights.

Ladki, Mikdashi, Fahed and Abbas (2002) found that Arab tourists usually travel as extended families in groups of between 14 and 21, or in slightly smaller groups of younger males (8-12). Trips typically last between 3 to 14 weeks and travellers have a preference for personally prepared home cooked food. These groups have been targeted aggressively by Airlines including Emirates, Gulf Air and Qatar Airways, in light of expectations of travel growth to Australia. Indicative of an expansion of airline seat capacity, Emirates Airlines now flies three times daily into Melbourne, capital of Victoria. Abu-Dhabi based Etihad Airways launched a Sydney service in mid 2007 and

will begin Melbourne flights from March 2009 (Ferguson, 2009). The airline also flies to Brisbane in Queensland (<http://www.etihadairways.com/>).

The latest MasterCard Consumer Lifestyles Survey concluded that the top ten international destinations for UAE travellers were India, Egypt, Australia, Malaysia, Turkey, Syria, UAE, Lebanon, Cyprus and France. It was revealed that UAE residents intended to increase their travel spending rapidly in 2008. Accordingly UAE consumers stated that their travel expenditure would increase from 88 percent to 99 percent. More than half of the respondents to the Lifestyles Survey expected to increase their spending by 10 to 25 percent (Maceda, 2008). In the case of families from the UAE and other Gulf nations, Malaysia has emerged as the most popular destination. For those Australia-bound travellers, Singapore has emerged as the favourite holiday stopover (Libo-on, 2009). According to a Malaysian Airlines executive, the most visited destinations within Malaysia by UAE and Gulf travellers are Kuala Lumpur, Penang, Langkawi and Kota Kinabalu.

The MasterCard survey revealed that around 78 percent of UAE consumers have already made travel plans for summer 2008. Across the Middle East and Levant, 91 percent of those surveyed said they were going to spend more on personal travel than in previous years. About 61 percent of respondents were planning to travel overseas for personal reasons, up from 56 percent in 2006 (Maceda, 2008). Though these indications are symptomatic of rapid growth, it is worth noting that the Global Financial Crisis (GFC) has started to impact upon Dubai as is the case elsewhere, so further growth is likely to be curtailed.

## **PURPOSE OF THE STUDY**

The present exploratory and qualitative study was intended to provide the basis for a subsequent and more detailed quantitative investigation. The aims were:

- Profile tourism flows from UAE to Australia generally and to Victoria in particular.
- Identify any government-related policies and practices (e.g. visa issuance) impacting upon Australia-bound tourism.
- Identify the perceptions of Dubai tourism operators towards Victoria as a destination.
- Highlight the perceptions of UAE outbound operators towards Australian inbound operators.
- Investigate the knowledge and awareness of outbound operators towards Victorian products and tourism attributes.
- Explore any cultural barriers to the development of UAE outbound tourism.

The study addresses the lack of research on the Middle Eastern outbound market and its growing importance for Australia's tourism industry.

## **RESEARCH APPROACH AND METHODS**

Four focus groups were conducted. The focus group membership consisted of

- Two groups of undergraduate students enrolled at Zayed University ([www.zu.ac.ae](http://www.zu.ac.ae)), Dubai (Emiratis).
- Expatriates resident in Dubai and;
- Major travel agents (primarily those involved in marketing Australia across the UAE and other Gulf Cooperation Council nations).

The deliberations of all four groups were recorded and video-taped.

Those participating in the four groups formed for groupings:

- Emiratis who had visited Australia previously
- Emiratis who had not visited Australia
- Expatriates who had visited Australia
- Travel agents

The sample selection was based on the following criteria: those who had visited Australia previously; those who had not visited but were aware of Australia as a destination, and travel agents actively involved in the marketing and sales of Australian travel products.

The travel agent focus group included all of the leading Dubai travel agents involved in the marketing of Australia. The study used a qualitative approach, involving the conduct of focus-groups, a qualitative method of social science research. This approach was adopted with a view to providing a research setting which would allow for clarification of key issues. Qualitative research is a more intrusive and less structured approach than quantitative research. It is widely accepted that qualitative methods are appropriate for the conduct of exploratory research and particularly in the case of relatively new or emerging areas of investigation. This is the case for travel from the UAE to Victoria, where the market is at the early development stage.

Patton (1987) has stressed that in qualitative research, researchers engage in the study of naturally occurring activities and processes. Such activities are “natural” in that they are not deliberately planned or manipulated by the evaluator, as would be the case in an experimental setting. In conducting the type of interviews evident in the present investigation, the researcher enters another person’s world in order to understand the respondent’s perspective. In entering this world it is difficult to form judgements about how people organise themselves and the meanings associated with this without asking questions. According to Patton (1987) *“The purpose of interviewing, ... is to allow us to enter the other person’s perspective.”*

Focus groups have been used in a variety of tourism-related research, including in front-end evaluation studies aimed at researching audience reactions, expectations, attitudes and interest; to uncover general background knowledge (preconceptions and misconceptions) about a topic; in formative evaluation studies; as a tool in strategic planning and stakeholder analysis and feedback; in audience research studies, such as researching selected audience groups and in market research to test advertising and

promotion concepts, consumer motivations and behaviour, perceptions and product satisfaction (Kelly, 2001).

## **MARKET SEGMENTATION**

According to the Dubai Statistics Department, around 2.4 million persons worked in Dubai in 2008, 1.6 million of whom are permanent residents and the remaining 800,000 reside outside Dubai. Expatriates comprise about 80 percent of Dubai's population, which consists predominately of Indians, Pakistanis, Filipinos, Iranians and Arabs of various nationalities. Dubai-based professional expatriates are typically employed in the public sector or by companies which have established local offices, attracted by the various tax and other government inducements. The organisations are diverse and range from international associations (e.g. the International Cricket Federation) to a multiplicity of tourism operators. Some Asian and most western expatriates are accompanied by their families within the Emirates and their children attend international schools. Many send their children overseas to pursue their studies on completion of their high school education.

The pattern of overseas education provision is changing with an increasing number of overseas higher education institutions entering Dubai, including Heriot-Watt, S.P. Jain, Middlesex and Michigan State Universities and Australia's University of Wollongong. Australia is a preferred destination for Dubai-based students seeking an overseas University education, especially in the case of Indian nationals, though increasingly amongst Emiratis. Dubai is attractive to foreigners because of its high expatriate salaries, the absence of income tax, lifestyle and long holidays. There are few opportunities for holidaying within the Emirates and the high summer temperatures ranging from 40-50 degrees add to the appeal of cooler climate destinations. Of the respondents in the present study, nearly all had a holiday during the previous year, mostly to Europe and with over half having travelled to Australia.

The major market segments relevant to Australia are:



- UAE nationals
- Expatriates
- Students

Two of the focus groups consisted of Emirati students studying at Zayed University. It was quickly ascertained that much of their previous travel had been undertaken with their families, so the researchers made an informed assumption that the views which they expressed were broadly representative of those held more widely within the family. The key travel decision-maker was identified as the wife and mother. Some of the expatriate respondents were University staff. All of the expatriate respondents had visited Australia previously and could be classified as experienced travellers. Of the various travel agent respondents all but one had visited Australia previously. It is worth noting that despite having a strong connection with education, the present study was confined to the views of Emiratis and expatriates in Dubai and did not investigate the views of Emiratis currently studying in Australia. Michael, Armstrong and King, (2004) have previously noted that friends and relatives who are visiting students studying in Australia are a potential market segment for Victoria. The emphasis of the current study on students who have opted to remain in Dubai to further their university studies means that the findings emphasize one group of the student population over others.

Prior to their travel, most respondents had used multiple sources to gather information. All had accessed the web and observed that most Australian tourist attractions had websites. Favourable comments were made about the Tourism Australia Website and Australia-based travel agents were viewed as a useful source of information. Student respondents and some expatriates had consulted encyclopaedias. One expatriate found guide books to be useful and cited the Lonely Planet Sydney guide as a good example. Sydney Harbour Bridge was the most frequently cited attraction. Other useful sources of information included the Australian Consulate and the Arab-Australia Chamber of Commerce. In the case of travel undertaken by a Zayed University student group arrangements were made directly by the University which influenced the information

source process to individual participants. Once in Australia, most respondents gathered destination information at the airport, though service personnel such as coach drivers and hotel staff were also cited as valuable sources. Respondents appeared to know little about Melbourne and Victoria, though some expatriates mentioned Melbourne radio as a helpful medium for information about music and entertainment. None referred to television as a source of information.

## **PERCEPTIONS OF VALUE**

Travel agents accounted for most of the travel arrangements for UAE families and individuals. The Emirati respondents generally preferred to travel in family groups and were relatively independent travellers. Few respondents had taken packaged tours of the type offered by Emirates Airlines, partly because of a desire to travel independently and partly because travel agents viewed this option as expensive. Most had travelled with Malaysia, Singapore or Emirates Airlines and opted for direct flights outwards with a Malaysia or Singapore stopover on the return journey.

Emiratis generally booked well in advance and opted for larger apartment-style accommodation with connecting rooms. They were often repeat travellers (one had booked the same Gold Coast apartment for ten consecutive years). The choice of apartment was influenced by word of mouth communication from friends and acquaintances. All respondents expressed a desire for quality accommodation, with Emiratis generally opting for five-star properties. Expatriates tend to arrive at the destination without prior reservations and made accommodation bookings during their travels. Some respondents commented on the high cost of accommodation, though this view was not uniform and others noted the availability of cheaper Eco-lodges and properties emphasizing their environmental credentials. Travel agents reported high levels of satisfaction with the available accommodation. The Australian accommodation ratings system received favourable comment as an indication of consistent high quality provision. According to one respondent: "If it says four stars, I know it is four not three stars". Emirati respondents reported that the costs prevailing in Australia were lower than

in Europe and that Australia generally provided “value for money”. Some expatriates thought that the destination was costlier than anticipated and that hotels were expensive. In terms of length of stay, most visitors spend at least two weeks at the destination, with 3-4 weeks the typical duration, although travel agents reported that one UAE tourist regularly stayed for four months. Many respondents were repeat visitors and all expatriate respondents expressed an intention to revisit.

## **REASONS FOR CHOOSING AUSTRALIA AND VICTORIA**

Figure 1 presents the most frequently mentioned activities and attractions in Victoria. It was found that Emiratis usually travel in family groups of between 7-8 people. A student group from Zayed University had toured Australia on a study trip. Emirati respondents reported that Australia is an attractive destination for families, especially the Gold Coast with its theme parks and associated attractions. Some respondents had previously holidayed in the USA, though Australia was viewed as safer and more welcoming than the USA, particularly since the September 11 terrorist attacks. In the case of the University study tour, Australia was selected because of the relative ease of travel and the opportunity to visit industries relevant to the expanding Dubai economy. Melbourne’s cooler weather and access to the Victorian snowfields had appeal for Emirati respondents. Expatriate respondents generally made individual travel arrangements and travelled with their partners or alone. Travel within Australia was viewed as straightforward, with Australians seen as friendly and helpful. Expatriates particularly enjoyed the various natural attractions.

Across the various respondent groups, Melbourne was rated highly for its shopping and cultural activities. The major reasons for visiting were its cooler weather, accessibility to the Victorian snow fields and (for some expatriates) music and cultural venues such as museums. Melbourne’s Immigration Museum received favourable comment and expatriates also mentioned pub music as a draw card. Emiratis also added that the fauna (e.g. the penguins at Phillip Island Nature Park, koalas and kangaroos) attracted them to visit the Melbourne area. Expatriates were particularly interested in music, evening

entertainment, museums and cultural attractions. The Emiratis had a strong family focus. They went shopping, and took day trips to destinations such as the Great Ocean Road and Phillip Island Nature Park. They were interested in shopping, especially at smaller outlets offering local products. Their other interests included museums, spas, horse riding and the snowfields. They were generally less interested in travelling around the metropolitan area or to suburban shopping malls, to international (e.g. duty free) shops, or experiencing sporting or other events.

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## **MELBOURNE TOURISM HIGHLIGHTS AND LOWLIGHTS**

Expatriate respondents commented favourably on Melbourne’s cultural activities, and about the prospects for spending time outdoors given the limits of such opportunities in Dubai. They were more adventurous than Emirati respondents and stayed overnight in a wide range of non-metropolitan settings, including along the coast. They were impressed with Melbourne’s ‘music scene’ and by the penguins at Phillip Island Nature Park. The Immigration Museum was described as ‘fabulous, best exhibit they had seen’ and the Zoo is “one of the best in the world”. Respondents reported that they felt ‘at home’ in Australia. The most positive experiences were associated with the Australian, with favourable comments made about their friendliness and diversity (compared with Europe and the USA).

Student respondents expressed concern about the lengthy queues encountered by non-Australian residents at passport control and the “circular formation” prevalent at Melbourne Airport which was viewed as difficult to navigate. The dissatisfaction with queuing was also expressed by travel agents. As Muslims with strong family and religious values, Emiratis found it difficult to locate appropriate food, prayer rooms and

mosques. The typical Emirati family is large and groups often extend to ten or more people. The limited provision of assistance with luggage at the airports was perceived as a major difficulty for families and students. Families generally appear to prefer accommodation in large apartments with inter-connecting doors and respondents reported that there was limited availability of this configuration in Melbourne. One student respondent reported that friends had returned to Dubai early following an unpleasant experience in the aftermath of September 11 terrorist attacks.

## **TOURISM OPERATOR RESPONSES AND MARKETING ACTIVITIES**

Most tourism operator respondents specialised in particular market segments, typically Emiratis, expatriates and/or corporate travellers. These respondents provided insights into the needs and perceptions of the various groups. Excellent growth prospects were noted for the market segment consisting of the relatives of university students studying in Australia. One travel agent respondent cited a growth in this market by about 15 percent in each of the two previous years. The Gold Coast accounted for around 70 percent of their Emirati bookings, with Sydney making up a further ten percent and only eight percent coming to Melbourne. It was noted that Emiratis are enthusiastic shoppers and one travel agent reported having arranged unaccompanied baggage weighing two tons for one client group on their return from Australia to Dubai.

Australia was viewed as attractive by travel agents because of its 'freshness' as a destination and value for money. Respondents reported that their Australia-bound business operations were profitable and that their clients were generally happy with the destination experience. The financial return from a single Australian package tour was considered equivalent to roughly four to Malaysia, a popular shorter haul destination. This may be indicative of a high yield and provides an impetus for respondents to persist with this destination. This is a positive omen for Australia's various tourism commissions

and to the various airlines currently engaged in the expansion of air seat capacity to Australia.

Dubai based travel agents reported a close working relationship with Australia's various State and Territory tourism offices, including Tourism Victoria. Respondents noted their participation in the Australian 'Tourism Road Show' and their partnership with government tourism departments in the production of the Destination Directory and Properties Directory consisting primarily of apartments. They reported that 'word of mouth' and personal relationships were key influences in determining the customer choices about destinations and accommodation. At the Australia-wide level, one agent complained about a lack of information and expressed the need for more briefings, staff training sessions and visits to Australia for tour operators. The same respondent expressed a specific need for some audio-visual presentation (e.g. in DVD form) about Australia's history and attractions. From the various travel agent discussions, it was evident that developing an understanding of the needs and wants of different market segments merits further investigation. Travel agency respondents mentioned that about fifteen to eighteen of them would be visiting Australia as part of a familiarization trip covering the Gold Coast, though only a small proportion would visit Melbourne. This is indicative that Melbourne remains a secondary tourism destination despite the substantial air seat capacity which is in place.

## **TOURISM RELATED POLICIES**

Respondents cited the lengthy period required to obtain a tourist visa as a disincentive to visit Australia. It was mentioned that the typical waiting period was 14 to 30 days, compared with two to three days in the case of Europe and the absence of any requirement in the case of New Zealand. The latter, however, was not a preferred destination because there is a perceived shortage of appropriate up-scale accommodation and Emiratis are not interested in the type of adventure tourism product which epitomizes the New Zealand tourism experience. An associated difficulty confronting New Zealand is the requirement for a transit visa for passengers touching down in Australia, even when

they are not disembarking. Since Victoria offers a tourism experience that has some parallels with New Zealand, it has some competitive advantages in these respects. The other accessibility problem highlighted by travel agents was that the Australian consulate no longer issues visas. This task has been outsourced to a private company based in Dubai's crowded and parking-deprived Bank Street area.

Respondents cited Australia's accommodation cancellation policy as another difficulty compared with common European practice. Full payment is required for any cancellation that is made within fourteen days, compared with two to three days in Europe. Few discounted Australian packages were available, except for those provided by Malaysia Airlines. Malaysia and Singapore Airlines were viewed as offering attractively priced in-transit accommodation in Singapore. Respondents claimed that Emirates Airlines does not offer competitively priced packages. This may be because Australia has been a fashionable destination and has been enjoying buoyant demand. These circumstances may have altered subsequent to the conduct of the current study because of the onset of the global financial crisis and the recent expansion of seat capacity. Respondents advocated the provision of increased air capacity to meet growing demand (Emirates has subsequently increased seat capacity for travel to Melbourne). Emiratis also noted the relatively long flying time of 14 hours as a disincentive to travel.

## **CONCLUSIONS AND OPPORTUNITIES FOR FURTHER RESEARCH**

This exploratory study has identified a number of internal or intrinsic factors that stimulate tourism activity from Dubai to Australia and to Victoria in particular, and some tentative conclusions may be reached. Emiratis travel in order to holiday, relax, spend time with their families and shop. Expatriates often travel quite spontaneously and are looking for discovery. The views that were expressed about Melbourne and Victoria were broadly favourable, with typical comments focussing on the friendliness and diversity of the population. Despite visitor reports that Melbourne has interesting cultural and shopping experiences, there was no strong tourism brand image evident for Victoria as a

destination. This is despite the fact that Victoria is viewed as a leader within the Australian market and is a powerful domestic brand.

The study points to the Gold Coast as Australia's best known and most popular resort destination among Dubai travellers, with a number of products offering meeting places and food. UAE travel agents view these features as very suitable for Emiratis. Melbourne's appeal is based on its cooler climate, readily accessible snow fields, cultural activities and shopping. This exploratory study has demonstrated the feasibility of obtaining strategic information to guide future planning to attract tourists from Dubai to Victoria. A comprehensive and quantitative investigation is now required to provide a more complete picture, drawing upon a more representative sample of Dubai's population.



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<http://www.uaeinteract.com>

**Figure 1 – Most Frequently Mentioned Activities and Attractions in Victoria**

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<b>Emiratis</b>	<b>Expatriates</b>
<ul style="list-style-type: none"><li>• Shopping</li><li>• Aquarium</li><li>• Great Ocean Road</li><li>• Snow</li><li>• Animals</li><li>• Museums</li><li>• Spas</li></ul>	<ul style="list-style-type: none"><li>• Outdoor activities</li><li>• Phillip Island Nature Park</li><li>• Music</li><li>• Arts/Culture</li><li>• Immigration and other Museums</li><li>• Melbourne Zoo</li><li>• Boat rides on the Yarra River</li></ul>

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