

Back to the future for Gulf tourism

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Contact

For centuries, hospitality was built on relationships. The hotelier knew the driver, the guide knew the restaurant, and the host understood that a memorable visit depended not on any single experience, but on how they all worked together.

Modern travel promised to make those connections effortless. Instead, it has often left visitors to assemble the journey themselves: one platform for flights, another for hotels, and more for transport, tickets, restaurants and everything in between. Travel has become a jigsaw, with every missing piece creating friction and a missed opportunity for the destination.

Over the past decade, Gulf destinations have attracted millions of visitors by building iconic landmarks, ambitious infrastructure and some of the world's most recognizable tourism brands. Now, the future of GCC tourism may not be defined by building more, but by taking one of Arab hospitality's oldest strengths and applying it at digital scale: building relationships.

Not just with hotels, airlines or attractions individually, but with the booking, ticketing and mobility platforms that already connect them to millions of customers. Rather than competing with those aggregators, Gulf destinations can bring them together, creating one joined-up journey while allowing every partner to retain its role.

This is the opportunity of a visitor operating system, a platform that takes the scattered jigsaw pieces and puts them together for the traveler, while giving destinations the full picture in terms of customer needs and potential revenue opportunities.

From many bookings

At its simplest, a visitor operating system consumes, whether international or domestic, a platform to discover, plan, book, explore and move around a destination. Today this might be delivered by an app, tomorrow by an AI-powered agent, but behind the technology sits something more valuable and future-proofed: a network of relationships and commercial agreements connecting the fragmented players that already provide hotel rooms, transport, event tickets, restaurant bookings and experiences.

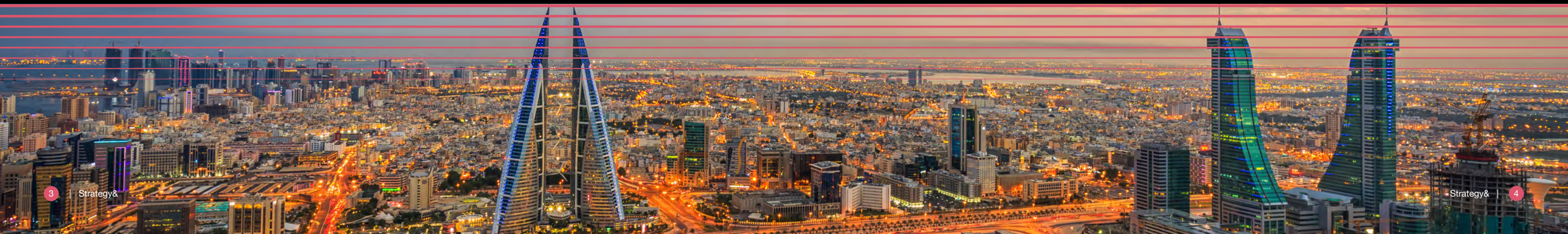
In practical terms, a visitor operating system aggregates the aggregators. It does not need a destination to rebuild or compete with the networks of online travel agents, ticketing platforms and mobility providers. Instead, it connects those established networks and uses them as the foundations of a more complete visitor experience. Imagine a family arriving in a Gulf city. Their hotel reservation becomes the starting point for the rest of their trip. Airport transport, museum tickets, a restaurant, an evening event and even childcare could be personalized around their itinerary, bought together and held in one digital pass or QR code, rather than scattered across multiple apps, emails and confirmation messages.

For the visitor, that means less searching and less administration. For each partner, it creates another opportunity to reach a relevant customer. For the destination, it creates a better chance of turning a hotel booking into a restaurant reservation, an event ticket, a museum visit or an extra night's stay.

to one journey

This is the win-win-win for the tourist, the partner and the destination.

The visitor operating system does not replace platforms people already trust, nor does it turn potential partners into competitors. Rather than cannibalizing the markets Gulf destinations have spent more than a decade building, it complements and connects them. Existing aggregators continue to provide inventory, fulfill bookings and manage their specialist services. The operating system joins the dots around the customer, then creates additional transactions across the wider journey.



A commercial engine, not another app

Aggregators already use referrals, campaigns and other marketing activities to acquire customers. A visitor operating system can work with those existing commercial models, earning fees when a user completes a booking and creating further value by connecting relevant services around it, increasing spending across more categories, and encouraging repeat visits and direct footfall toward experiences that visitors might otherwise miss. This revenue can help fund the platform, support destination marketing and strengthen the wider tourism ecosystem.

It can also support domestic tourism. Residents can use the same platform for events, restaurants, wellness, entertainment and short breaks, creating habits and demand between international travel peaks.

Saudi Arabia demonstrates the scale of that opportunity. The Ministry of Tourism reported:

93.3 million + 29.3 million
domestic tourists inbound tourists

in 2025

A domestic audience of that size is not a secondary market. It can provide regular use, transaction volume and customer insight needed to make a destination platform relevant throughout the year.

Why the Gulf can win

As tourism leaders gather in Dubai for Arabian Travel Market 2026, the conversation is focused on innovation and technology. This year's ATM theme, "Travel 2040: Driving New Frontiers Through Innovation and Technology"[3], reflects how quickly artificial intelligence, digital discovery and changing traveler expectations are reshaping the industry.

But technology may not be the Gulf's most important advantage.

In many global cities, the visitor economy is divided among dozens of unrelated businesses, public bodies and transport operators. Each owns one piece of the experience, but no institution has either the mandate or influence to bring the whole together.

Gulf destinations start from a different position. Governments and state-linked organizations often own, influence or can convene many of the destination's most important assets, including airlines, airports, museums, public transport, cultural institutions and major attractions. That makes it possible to create the critical mass needed for a visitor operating system, before inviting the wider private sector to join.

Abu Dhabi offers a focused example of this logic. Unveiled at Arabian Travel Market 2026, its Islands and Water Sports Guide brings itineraries, activity recommendations, licensed operator listings, protected-area information and an interactive map into one platform covering more than 200 islands.

And in Saudi Arabia, the Nusuk platform, developed for Hajj and Umrah to unify services spread across multiple entities, now serves more than 51 million users in more than 190 countries through over 130 digital services, spanning permits, hotel reservations, transport, integration with air and land travel, smart maps and crowd management. Neither are full examples of a visitor operating system but do show how fragmented partners can be brought together through collaboration across government and industry.





Technologies change. Relationships endure.

Artificial intelligence will inevitably change how visitors discover and buy travel, but whatever technology travelers use in 2040, it does not remove the value of a visitor operating system. The enduring and defensible asset is the network of commercial agreements, inventory access, data-sharing terms, service standards and partner relationships that allows a destination to assemble the journey.

These must be governed carefully. Partners need confidence that the platform will create additional value rather than divert existing customers. Ranking and recommendations must be fair. Data rights must be explicit, and accountability must remain clear when several companies contribute to one journey.

A state-backed or neutral operator can act as the trusted orchestrator, but only if it sets transparent rules, protecting partner economics and ensuring that the destination works as one experience.

Arab hospitality has always been about more than welcoming someone at the door. It is about understanding the guest, anticipating what they may need and ensuring that the right people come together to look after them.

Modern travel has broken that experience into pieces. A visitor operating system gives Gulf destinations the opportunity to put the picture back together.



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Evidence appendix

1. Booking.com Affiliate Partners | Booking.com | Live official program page, accessed 15 September 2026

Supports: The statement that major travel aggregators use affiliate and referral arrangements, and pay commission on qualified bookings. The page also illustrates the breadth of bookable inventory available through one aggregator, including stays, flights, car rentals, attractions and airport taxis.

Official link: <https://partnerships.booking.com/>

Related technical link: <https://developers.booking.com/demand/docs/open-api/3.2/demand-api>

2. Tourism in Numbers | Ministry of Tourism, Kingdom of Saudi Arabia | 2025 data, accessed 15 September 2026

Supports: The 2025 totals of 93.3 million domestic tourists and 29.3 million inbound tourists in Saudi Arabia.

Official link: <https://mt.gov.sa/en/tourism-in-numbers>

Supporting Ministry report: https://cdn.mt.gov.sa/mtweb/prod/uploads/220626_MT_I_Special_report_EN_DIGITAL_f315fd8df3.pdf

3. ATM 2026 set to strengthen partnerships, reinforce confidence and shape the future of global travel | Arabian Travel Market / RX Global | 10 September 2026

Supports: The official ATM 2026 theme, “Travel 2040: Driving New Frontiers Through Innovation and Technology,” and the event’s 14–17 September 2026 timing at Dubai World Trade Centre.

Official link: <https://www.wtm.com/portfolio/en-gb/blog/press-releases/atm-2026-set-to-strengthen-partnerships-and-return-to-dubai.html>

4. Department of Culture and Tourism - Abu Dhabi launches Abu Dhabi Islands and Water Sports Guide | Abu Dhabi Media Office | 14 September 2026

Supports: The description of the guide as a single digital platform combining itineraries, activity recommendations, licensed operator listings, protected-area information, an interactive map and practical coastal guidance across more than 200 islands. The source also confirms that it was developed with government and industry partners and launched to coincide with Arabian Travel Market 2026.

Official link: <https://www.mediaoffice.abudhabi/en/tourism/department-of-culture-and-tourism-abu-dhabi-launches-abu-dhabi-islands-and-water-sports-guide/>

5. Nusuk App Redefines Hajj, Umrah Experience for over 51 Million Users Worldwide | Saudi Press Agency | 22 May 2026

Supports: The statement that Nusuk was developed to unify services previously distributed across multiple entities and now serves more than 51 million users in more than 190 countries through over 130 digital services. The source describes services spanning permits, hotel reservations, transport, integration with air and land travel bookings, smart maps and crowd management.

Official link: <https://www.spa.gov.sa/en/N2595546>
Related official platform: <https://www.nusuk.sa/>