INSIGHT | OUT

Middle East Consumer Travel Report 2018

March 2018

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A Custom Report Commissioned by:

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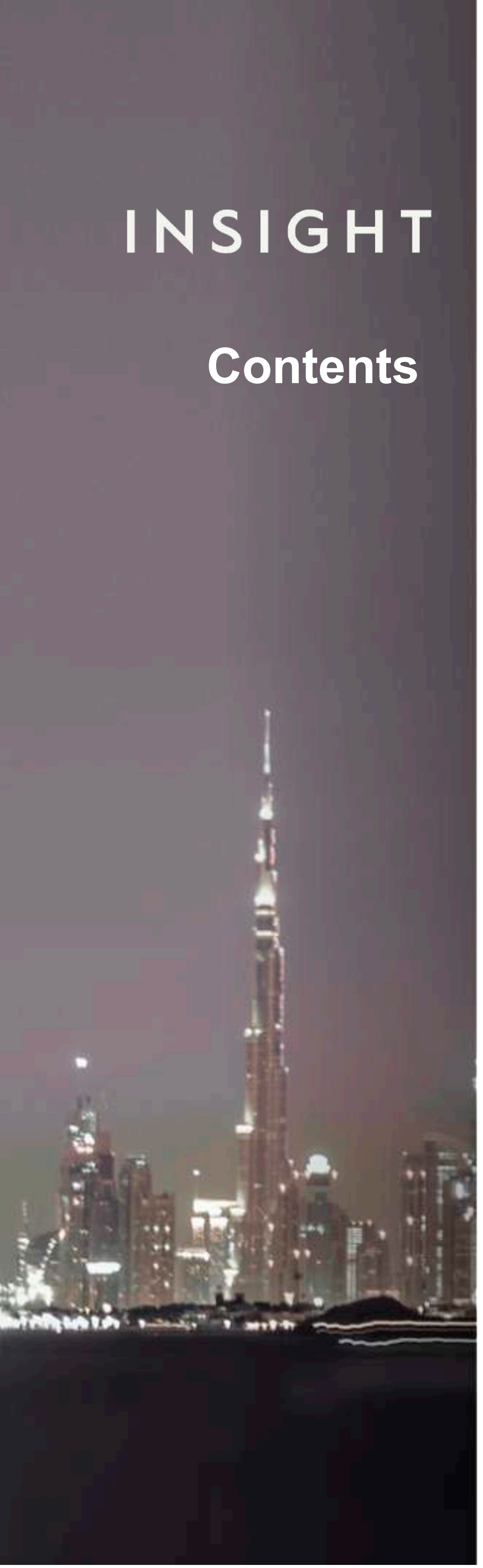

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Contents

Sub-region specifics:
1. Egypt
2. GCC
3. Levant

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Field Agencies

Ipsos — **Quantitative Surveys**

ARCHERS Research & Brand Consultancy — **Focus Groups**

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Introduction

- Business Objectives
- Research Objectives
- Research Methodology

Business Objectives

Construct an insights-driven ME consumer purchase journey for travel products and services.

By better understanding the key moments of truth and problem areas throughout the journey as well as the best way to connect with Middle East customers at each touchpoint and win in the marketplace

01

Customer

The who, how, when & why during a purchase journey

02

Supply Chain

The supply chain's role and influence in the purchase process

03

Journey gaps

Build of the purchase journey map with clear evaluation of problem and gap areas

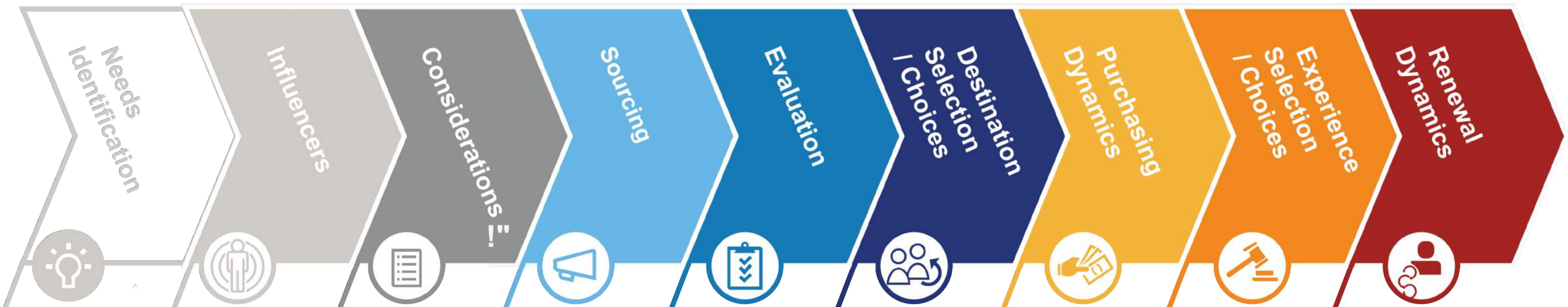
04

Messaging

Build up of rational and emotional messaging across the purchase journey and respective activation plan

Research Objectives across the Purchase Journey

Pre-purchase preparation | **Purchase** | **Post-purchase**



Needs Identification
- What is the 'trigger'?
- How (and when) are needs identified?
- What are the key stakeholders' 'unmet needs', desires, pain-points, barriers / drivers of tech adoption

Influencers
- What are their roles & responsibilities?
- How do customers/travel providers interact?
- What makes customers "tick"?
- Who has the budget?

Considerations
- Are there any dependencies (VFF, business, health)?
- Budgeting for travel?
- What are the budget thresholds?
- Buying cycles (holiday seasons)?
- When are decisions made?

Sourcing
- What type of information is sought and where?
- What are the sources?
- What channels are used for sourcing

Evaluation
- How does the product, destination & activity evaluation process work?
- How is "value" measured?
- Most important benefits?
- Long-haul?
- Short-haul?

Destination Selection / Choices
- How do they perceive a destination?
- What are the likes/dislikes?
- What are the emotions that made them wanted to visit?
- What type of education materials, and type of advertising/sales tools they need from suppliers?
- How does the evaluation process work?

Purchasing Dynamics
- Who makes the final decision?
- What "cuts the deal?"
- Is there an emotional connection to the final decision?
- How is the purchase process in the household?
- How does the purchase process vary by channel?

Experience Selection / Choices
- Are customers satisfied?
- What are the delight areas? Pain points? Unmet needs?
- How is user experience measured?
- Technical / payment support

Renewal Dynamics
- How do we make it back to the consideration set?
- Are they loyal to a specific supplier/ intermediary? Why? How?

Research Methodology

DESK RESEARCH

100+

Analysis of existing reports articles and databases

TRAVEL TRADE INTERVIEWS

23

Interviews with trade executives

Tour Operators, Regional & Global OTAs, Travel Agencies and TMCs across 9 countries.

CONSUMER FOCUS GROUP DISCUSSIONS

6

Focus group discussions held in 3 key markets (UAE, KSA, Egypt)

FG by Archers

UAE : National Males
UAE : Arab Males
UAE : Western Mix
KSA: National Females
KSA: National Males
Egypt : National Females

QUANTITATIVE QUESTIONNAIRE

1953

Interviews with travel customers carried out across 9 countries

Survey by IPSOS

Face to face and online surveys providing a representative sample of the defined region.

ANALYSIS

Triangulation of market, travel trade & research findings

Disclaimers

- All numbers are reported as percentages
- Base has been added where applicable
- Un-prompted questions resulted in additional travel providers not initially included in the study being stated by respondents. For example in ‘Top of Mind’ travel brands

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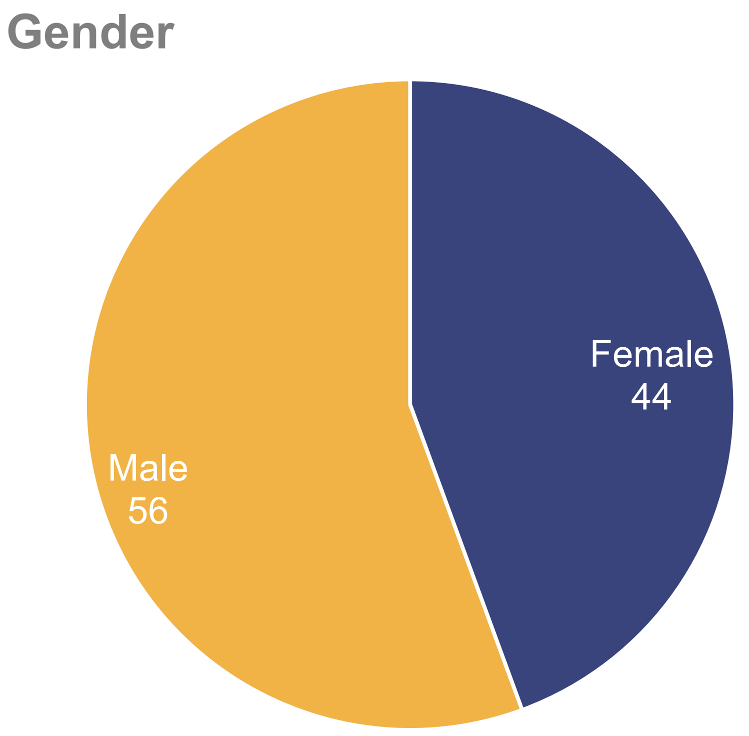
Traveller’s demographics

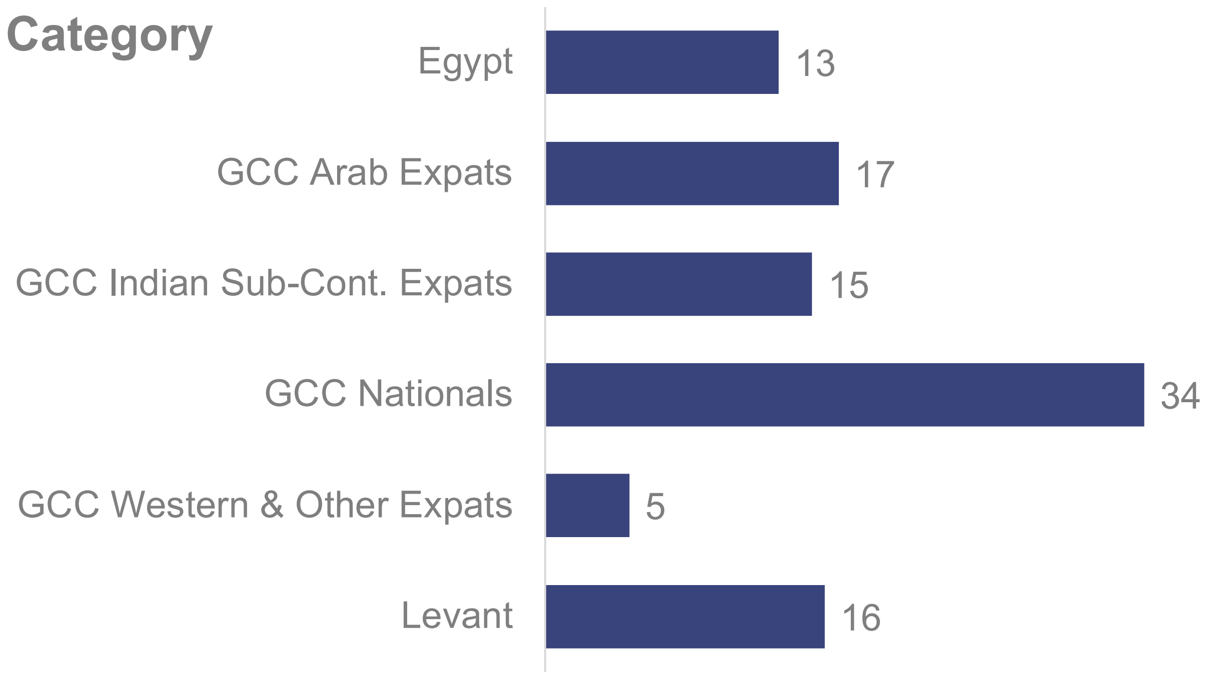
“We love travelling. Our journeys begin in our tech-savvy twenties when we are happy travelling alone or with friends regionally.

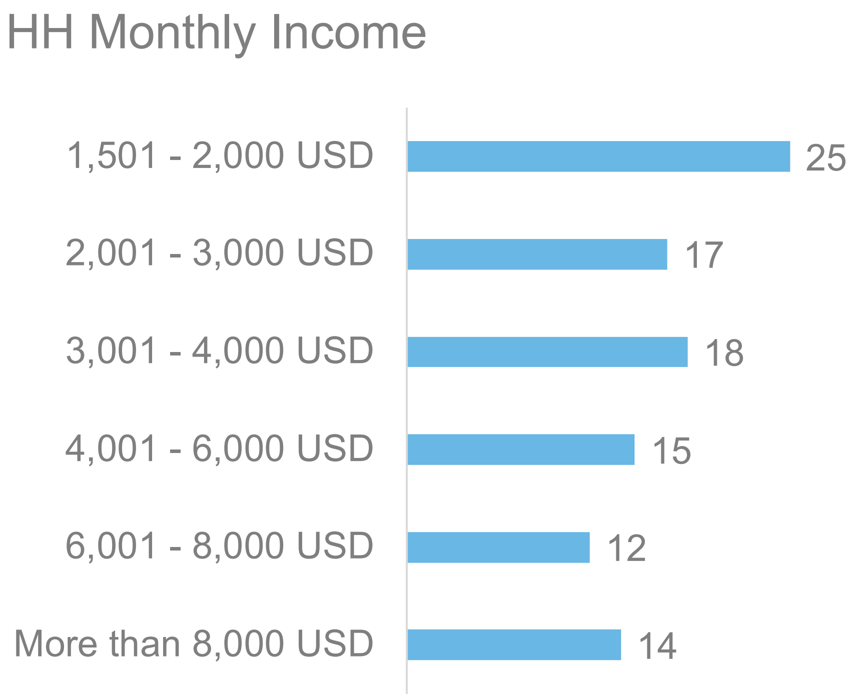
As we grow into families we are happiest travelling with other families to international destinations.

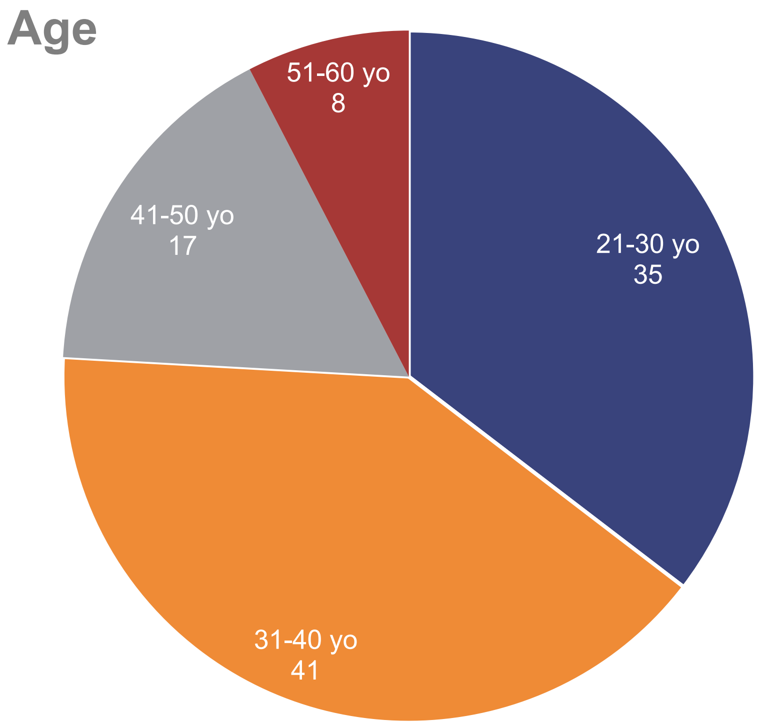
Technology has completely changed the way we research and book travel”

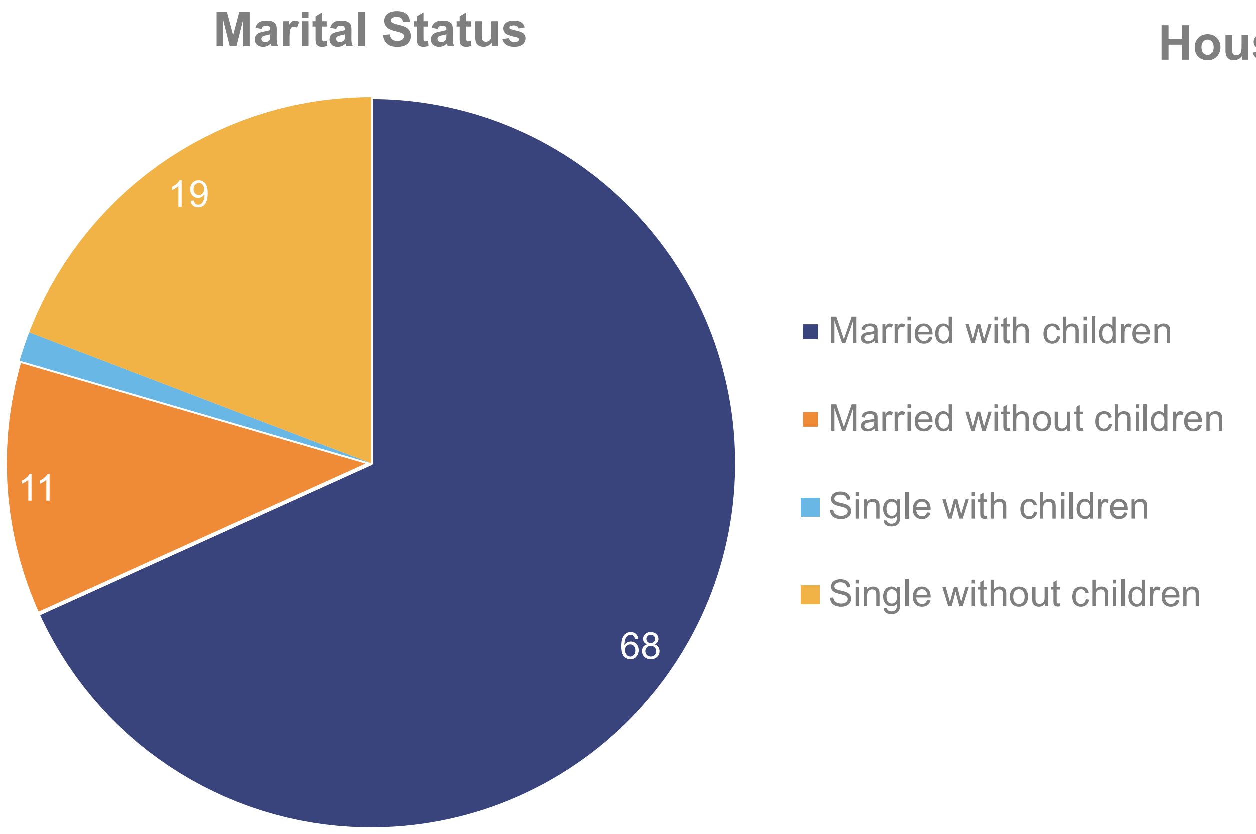
Sample Composition

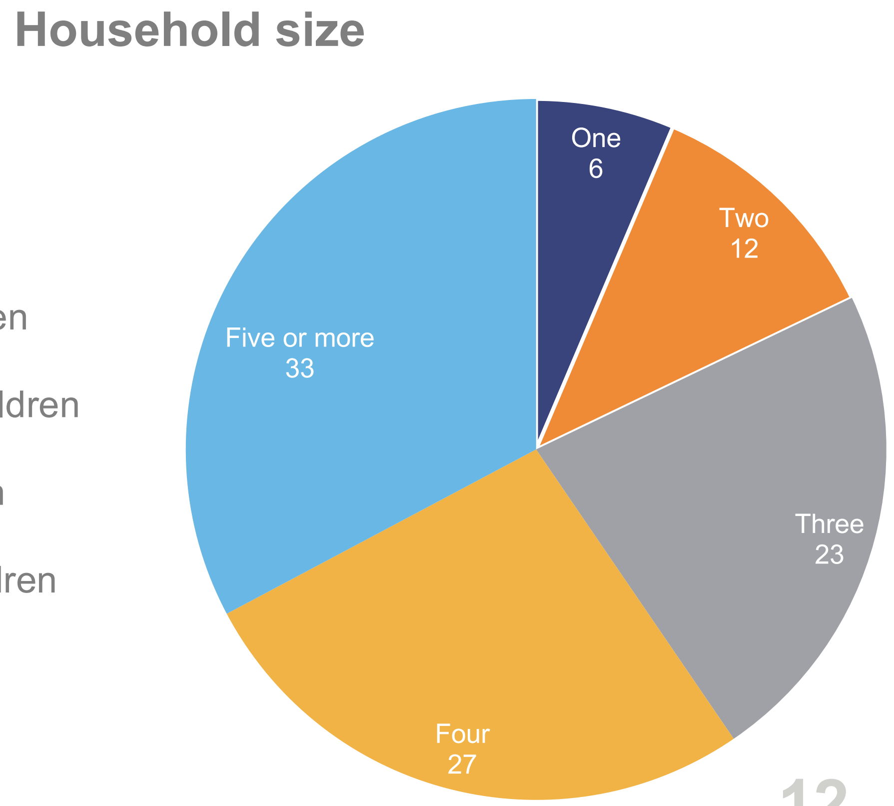








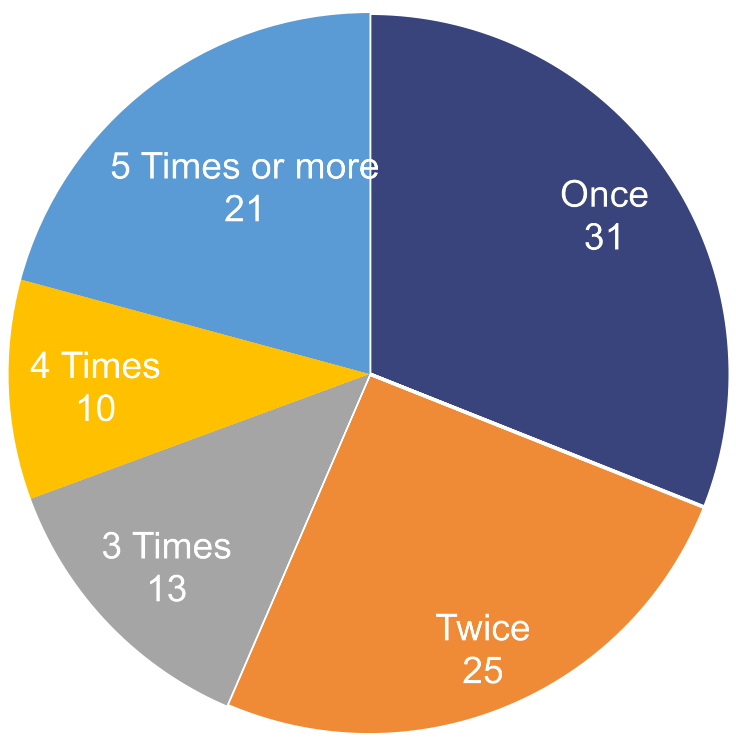




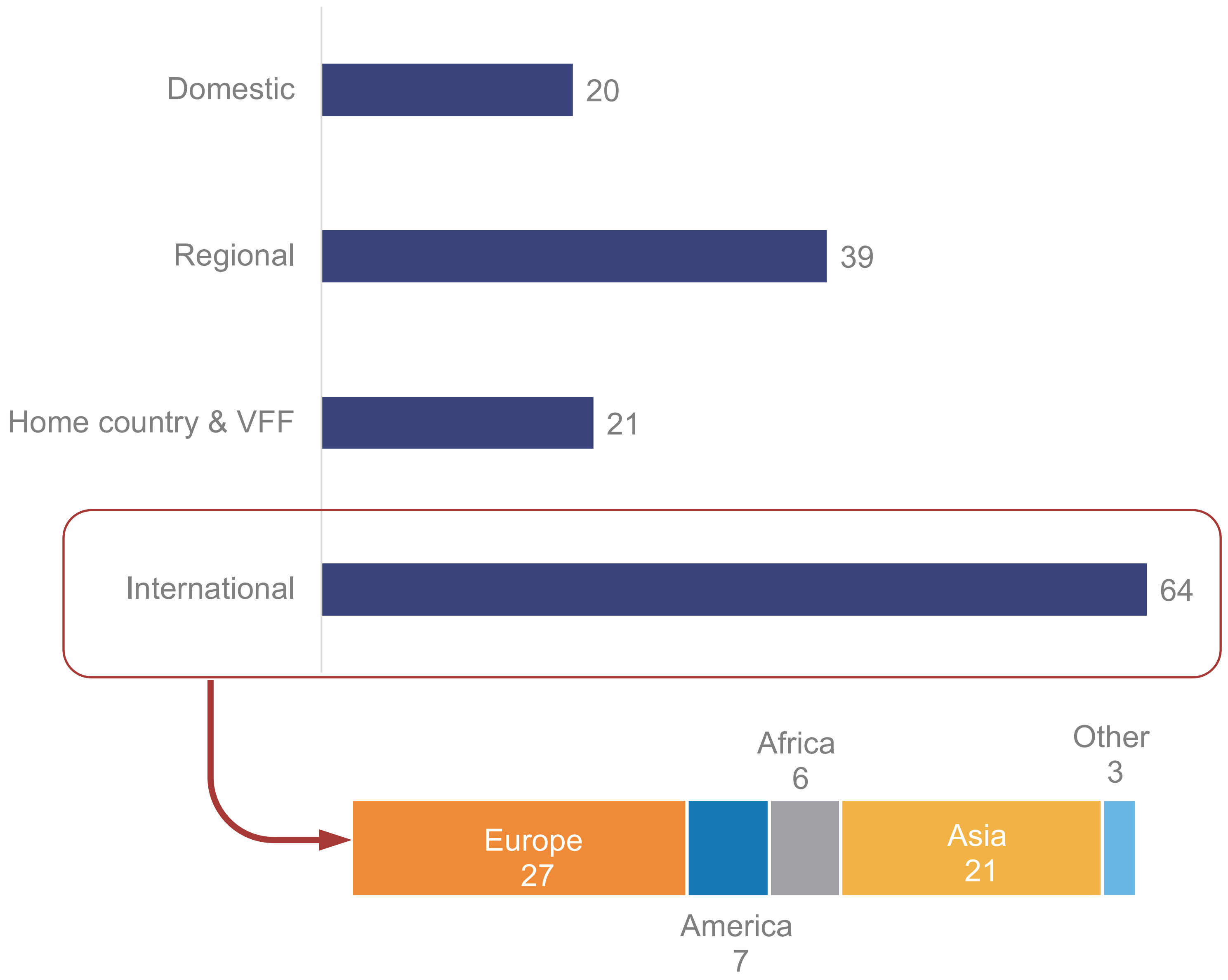
Travel

Multiple Answers

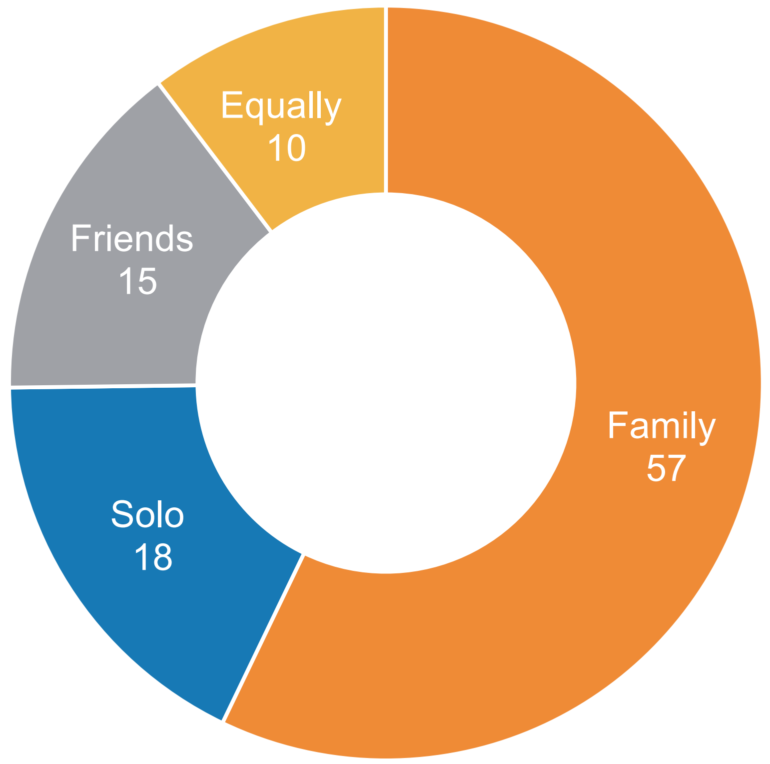
Frequency



Destination

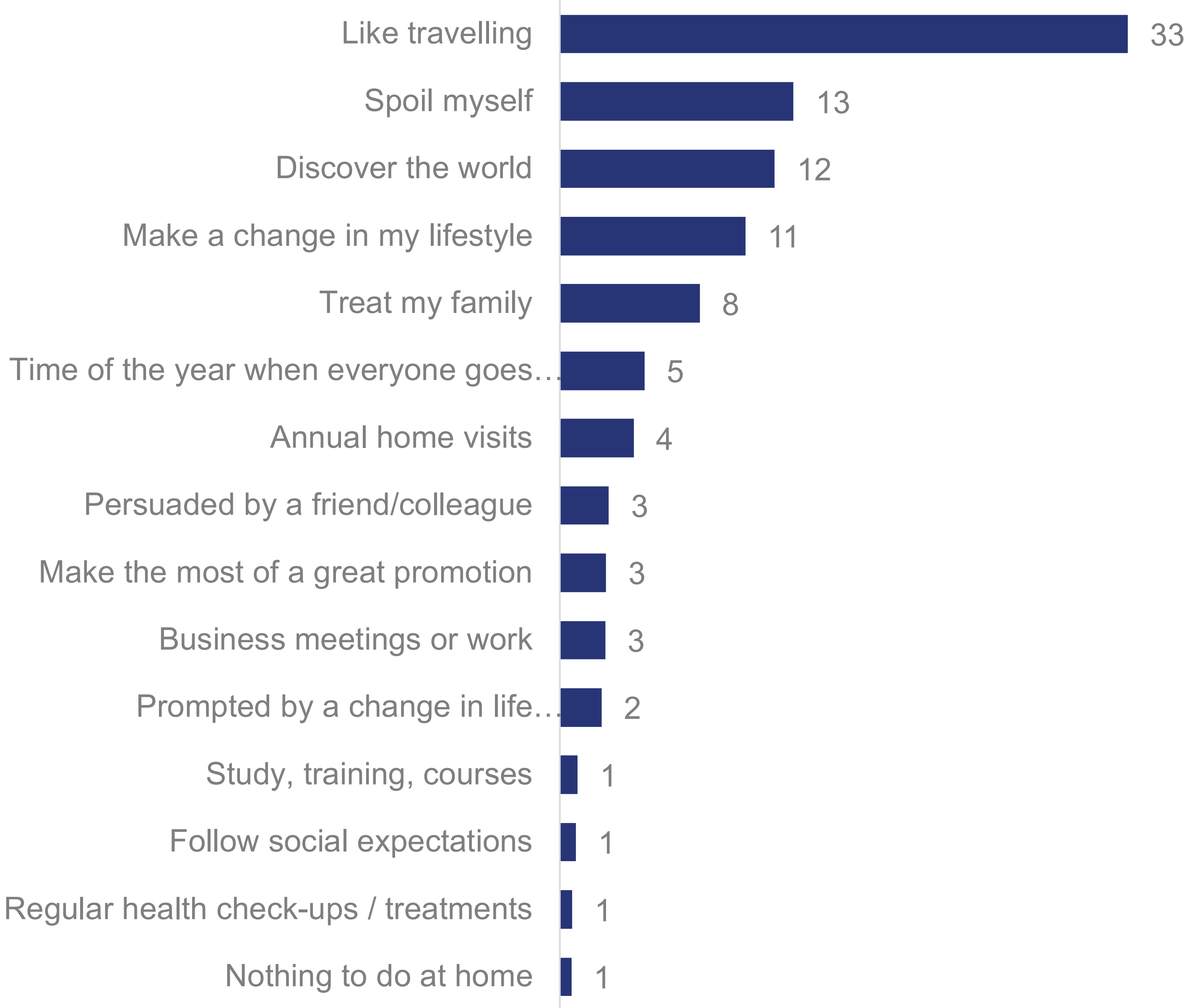


Companionship

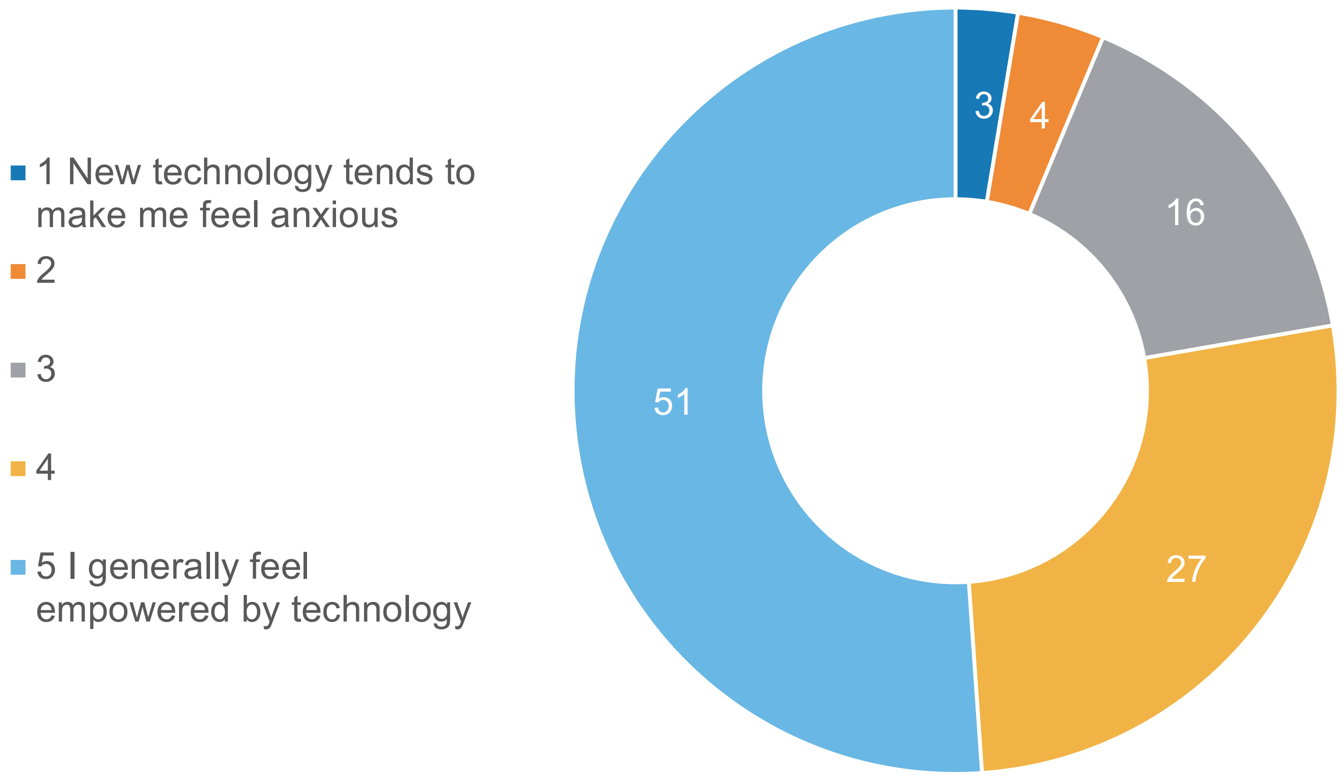


Mindset When Booking Travel

Motive for travelling



Tech savviness

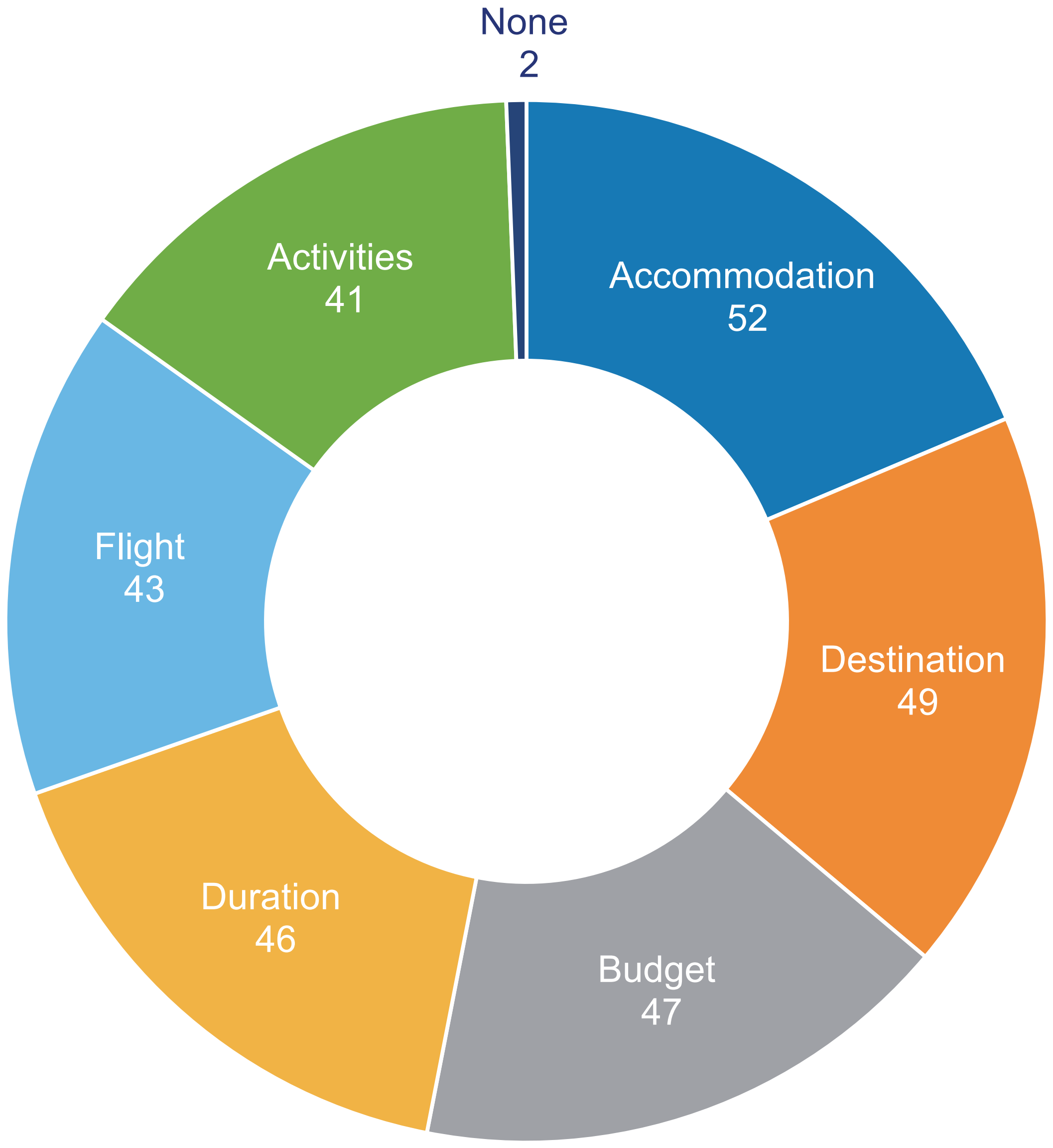


Scale from 1-5, 5 being most tech savvy

Mindset When Booking Travel

Exploration

Pre-Determination



OPEN 52 **COMMITTED** 48

Traveller's Demographics Summary

- The sample categories were defined based on the surveys, travel trade interviews and focus group findings.
  - Levant and Egypt have a limited percentage of expatriate population however display different travel habits throughout the journey
  - GCC is split into 3 homogenous groups of travelers: GCC nationals, non-GCC Arab expatriates and Western & other expats
- The age split highlights that the 21 to 40 year old travelers represent 75% of the regional travellers
- Based on the life cycle, until their late 20's, they travel as couples or groups of friends (14.8% travel mostly with friends)
- 68% are married with children which confirms the companionship ratio of 57.1% travelling as families. With a household-size statistic of 27% having 4 people and 33% being households of 5 people or more, and in correlation with the feedback from the travel executive interviews, it is indicative that Arab Nationals appreciate travelling as groups of 2 or 3 families. It appears that family trips can be assimilated to small groups

Traveller's Demographics Summary …Cont.

- The household size in the region is high with 33% of households having 5 or more people which impacts their travel habits as seen later in the report
- 64% of respondents confirmed travelling out of region (excluding home country) in the last 12 months
- 57% of respondents travelled less than 3 times during the period. The international trips were mainly split between Europe (27%) and Asia (21%)
- From a mindset point of view, most of the travellers consider themselves as tech-savvy (51% feel that technology empowers them)
- Travelling is perceived as a positive activity and 33% of the respondents like it, or see travel as a treat to themselves (13%) or their family (8%). 12% travel to discover the world and 11% to make a change in their lifestyle
- 52% of travellers like to take the opportunity to explore and search ideas, options and good deals before making up their mind. The other 48% organize their trip with a much more determined mindset and agenda. 49% of the travellers know where they want to go, 47% have decided on their budget and more than 52% know where they are going to stay

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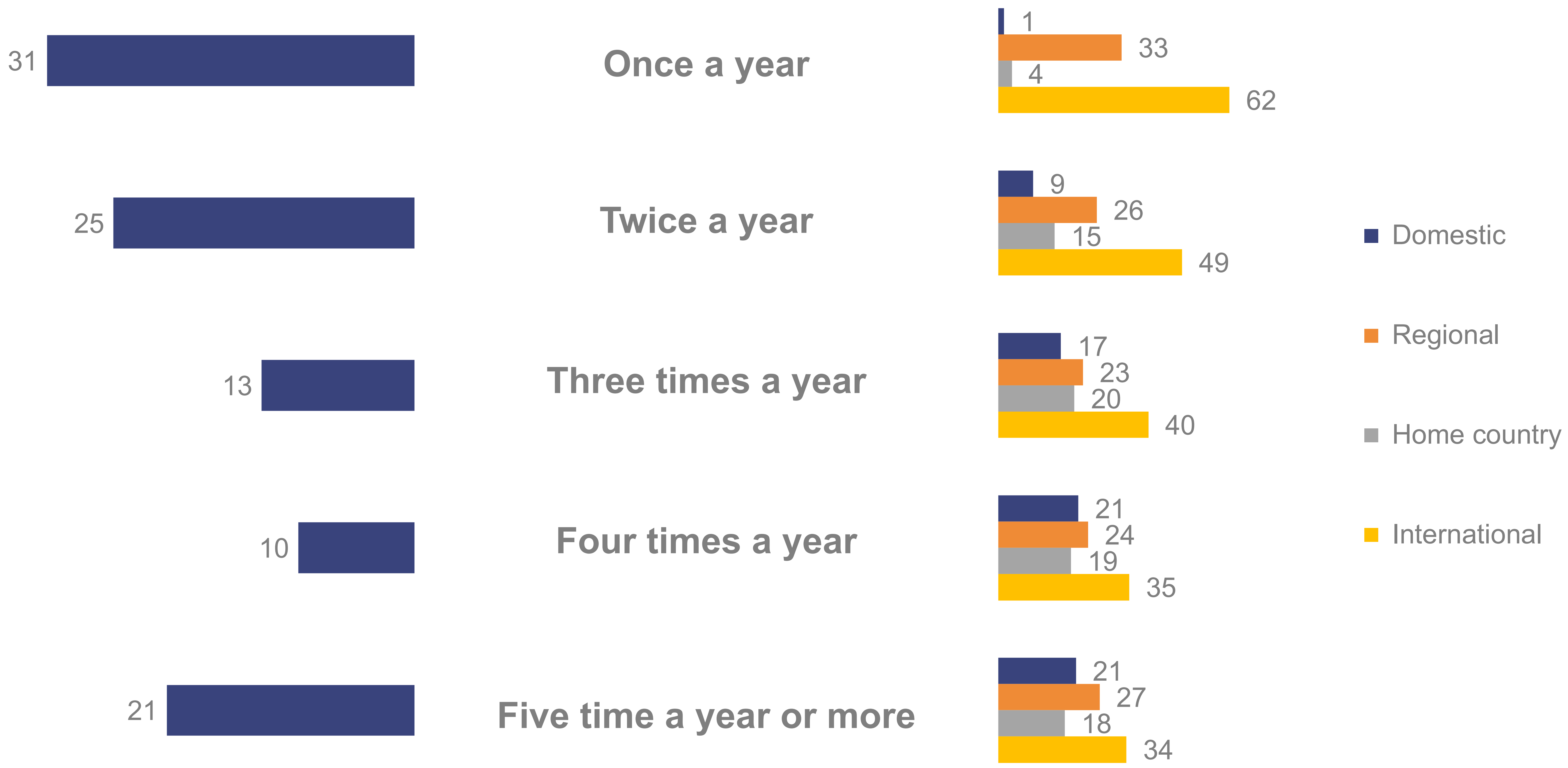
Travel Patterns

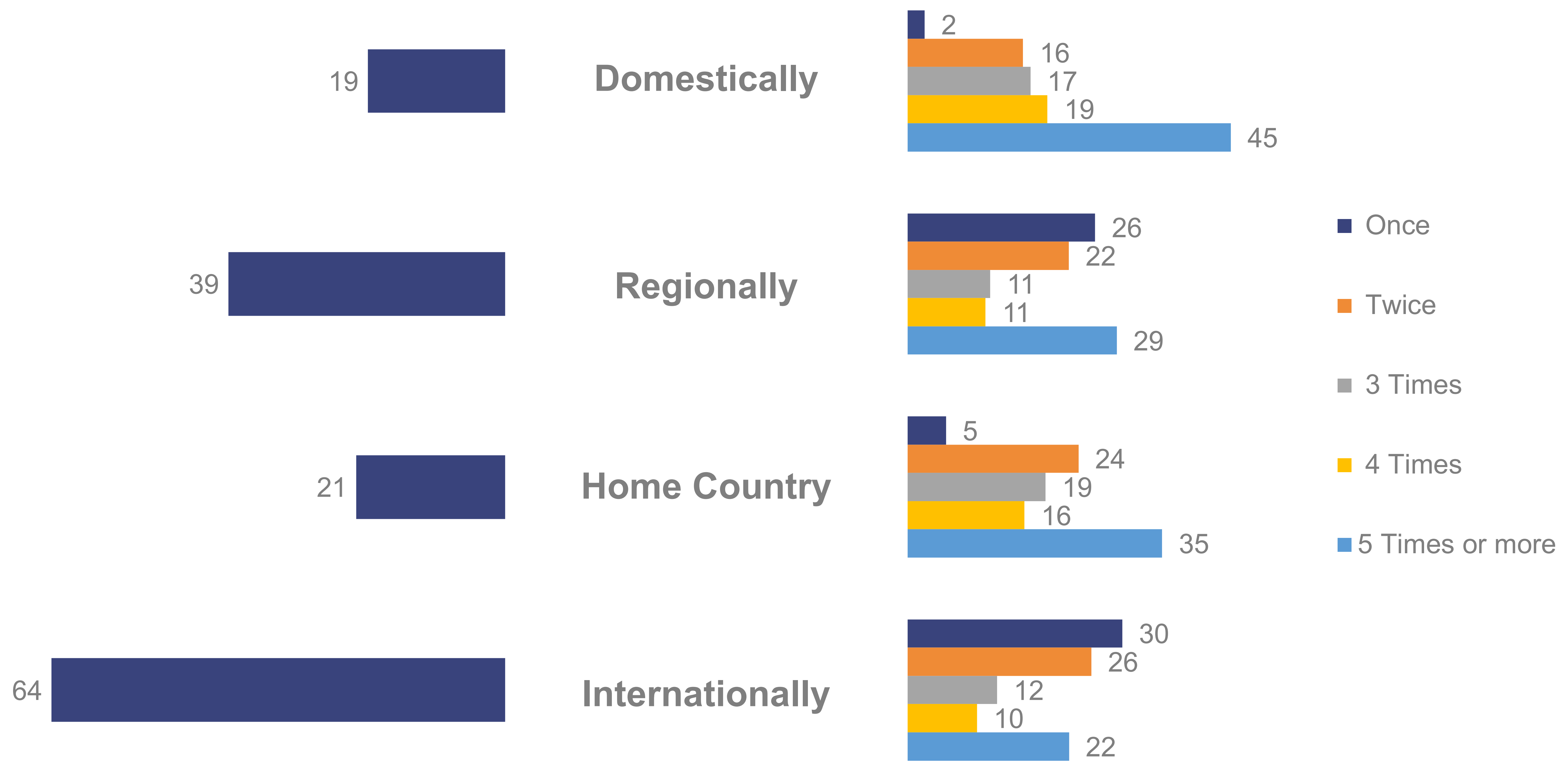
- By Frequency
- By Destination
- By Origin
- Frequency & Destination
- Destinations: Long, Short, Domestic
- Duration & Seasonality
- Destination & Duration
- Domestic
- Type of Vacations

By Frequency



Base: Frequency

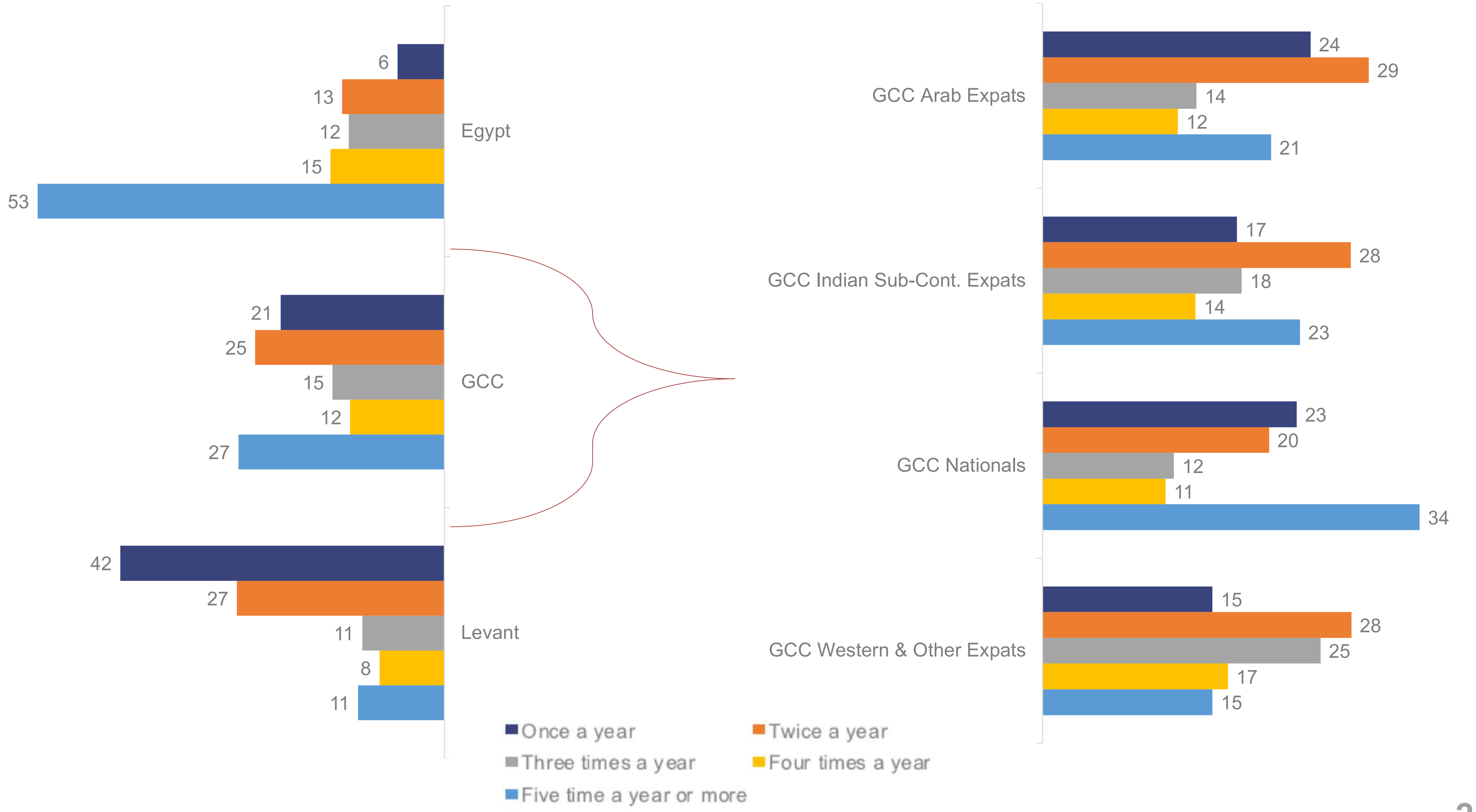
By Destination



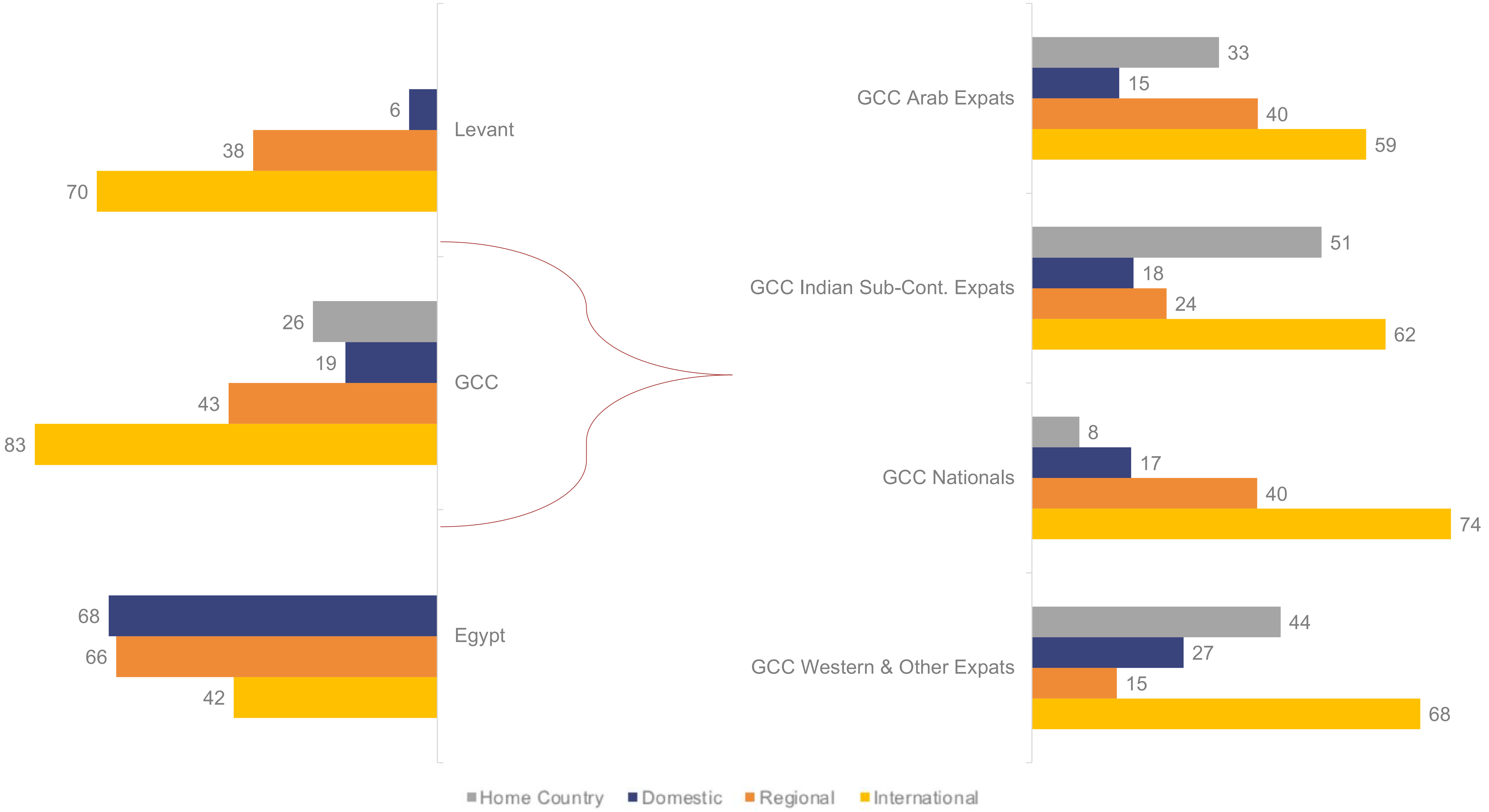
Multiple Answers

Base: Destination

Travel Frequency by Origin



Travel Destinations by Origin



Multiple Answers

“We are a region that loves to travel and international destinations tick our biggest box

Most of us travel at least twice a year but five times or more isn’t unusual for a market that thrives on travel, regionally and internationally”

Frequency & Destination

- The frequency of travel relates to all type of travel including business trips
- The 31% of respondents only travelling once a year choose international destinations for that trip (62%). The 21% who travel the most (5+ times a year) are the travellers visiting their home country (35%) and travelling domestically (45%)
  - GCC Nationals is the category of population travelling the most internationally 34% of them travelling 5+ times each year
  - Egypt residents are the ones traveling the most often with 53% travelling 5 times or more however 47% travel domestically and 66% regionally with less international travel
  - In Levant, 42% of the travellers make a trip once a year however 70% choose international destinations
  - 53% of GCC Arab expats are travelling once or twice a year however 59% travel internationally
  - GCC Indian & Subcontinent expats and GCC Western & Other expats are the ones travelling home most often 51% and 44% respectively. Respectively, they also travel 62% and 68% to international destinations. Travel executive interviews also confirmed that expatriates going "home", sometimes combine it with a trip overseas (South East or Far East Asia for Indian nationals for instance)

Destinations

- When choosing the destination for vacations there are several very clear criteria for Middle East travellers that were mentioned most often during Travel Trade interviews:
  - Safety: This is a major concern for all travellers, however during Focus groups, it became apparent that safety was viewed as the direct responsibility of the Male for the rest of the family for Arab Nationals
  - Nature & Weather: Luxury and green landscapes are definitely attracting Middle East travellers along with cooler temperatures in summer
  - Multiple activities suitable for the household: Travellers are cautious about the destination being able to cater for all family members and children in particular. Availability of entertainment parks, shopping, choice of restaurants for foodies, sightseeing and other cultural activities, are part of the criteria for selection of the destination
  - Warmth & friendliness of the host country: The emergence or success of some Asian destinations e.g Thailand relate to the nature of the warmth and sincerity of the people/culture. Middle East travellers need to feel ‘welcomed’. Some European cities are perceived negatively in this respect
  - Budget: Clearly a criteria at all touch points of the journey. Budget triggers most of the decisions for all Middle East travellers irrespective of their nationality or country of residence

Based on qualitative research

Destination…Cont.

- New airlines and increased low cost carrier (LCC) routes are supporting the emergence of new destinations
- Visa agreements promoted by word of mouth is also supporting new destinations
- Business trips are generally intra-regional (based on travel trade interviews)
- Some travellers prefer to return to the same destination frequently as is the case for GCC Nationals re-visiting European capital cities, or for all travellers visiting Dubai. In the case of the European capitals, they are perceived as “home away from homes” while Dubai is seen as a regional and convenient hub where travellers can enjoy multiple activities and have fun
- Couples are generally more flexible on destination and advice. With more than two travellers, there is less opportunity to influence destination as many parties have to be in agreement

Duration & Seasonality

- The fragmentation of annual leave (69% travel more than once a year) into several shorter trips generally results in extended weekends or staycations in the GCC, domestic trips (Saudi, Levant and Egypt), and 1 or 2 longer ones internationally
- Short trips are often taken on the occasion of public holiday weekends such as Eid Al Fitr, Eid Al Adha, National Days or simple weekend breaks and vary between 2 and 4 nights
- Longer trips (5 to 10 nights minimum) are dependent on the country of residence and are taken during the summer, end of year festive season and Easter / Spring school break (Egypt and GCC Western Expats mainly)

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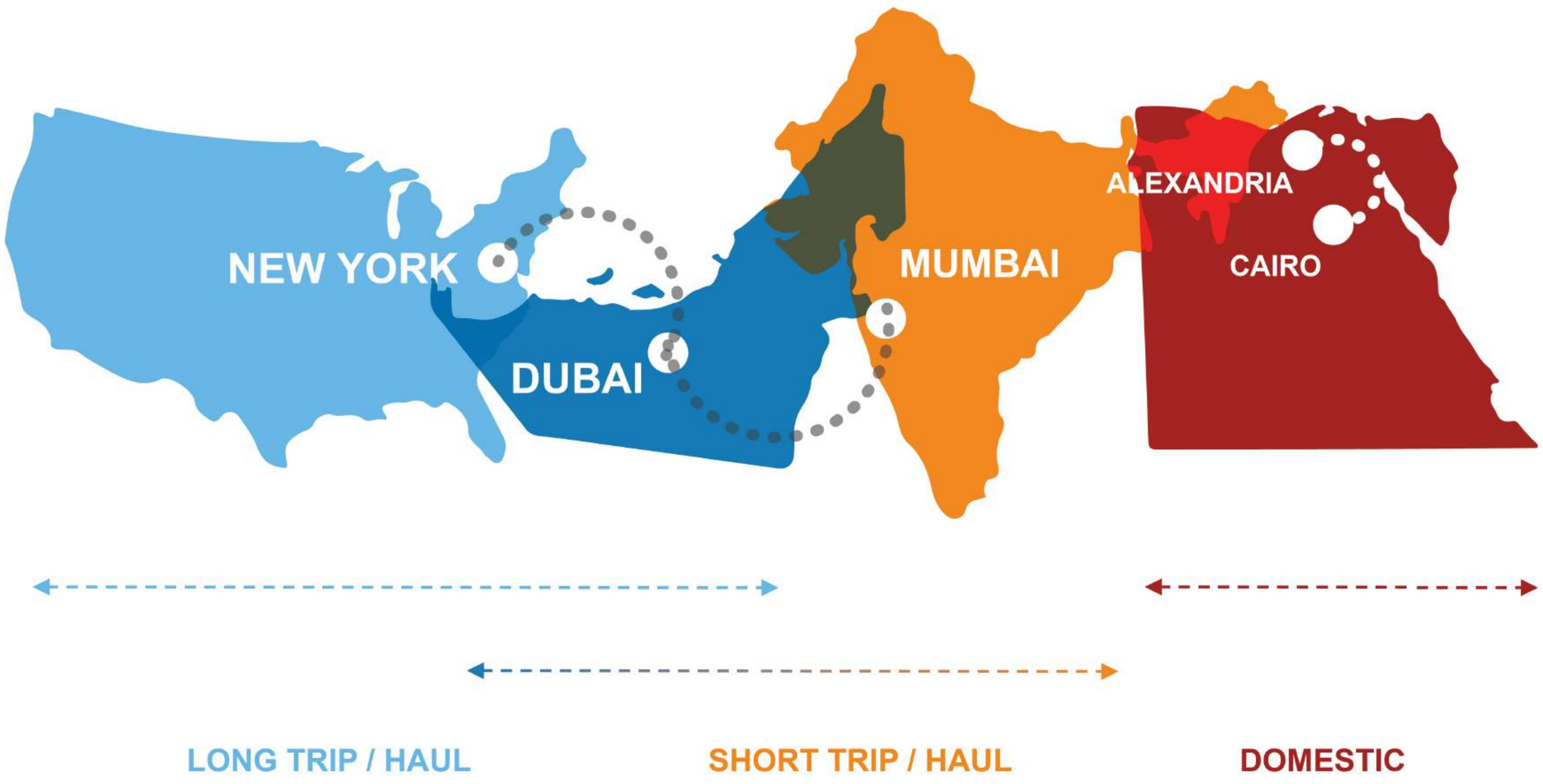
Destinations & Duration

The Most Visitied Destinations



LONG TRIP / HAUL

- **Europe:**

  London, Paris, Barcelona are the favourites of the travellers for the wide choice of activities: shopping, sight-seeing and cultural visits. Marbella was also mentioned for its seaside and port

  London remains the 1st destination of a ME traveller visiting Europe

  France is often mentioned as an easy destination to obtain Schengen visas compared to Spain or Italy

  Greece for Egyptians

- **Far East & South East Asia:**

  Thailand, Malaysia & Indonesia are among favourites as summer breaks by Families, both traditional and adventurous travellers certainly find suitable activities there. Japan, HK, Singapore are emerging

- **Americas:**

  Appreciated by GCC Nationals, New York will be the 1st destination visited.

SHORT TRIP / HAUL

- **Intra-region:**

  Dubai continues to lead as regional / short haul / weekend destination

  GCC Western expats like Jordan & Oman, while Saudis like Bahrain or Kuwait when they don't go to Dubai

  Muslim residents of all groups will also perform Umrah & Hajj in Saudi (Shias from Bahrain or Saudi will go to Iraq / Iran)

- **Central Asia:**

  Georgia, Azerbaijan, Armenia benefit from LCC routes, visa agreements & competitive pricing

- **Balkan countries:**

  Turkey, Bosnia Herzegovina and Croatia

  Turkey has for long been part of the ME traveller's favourites despite the recent years of political unrest and terror attacks

- **India Subcontinent**

  India, Sri Lanka are praised mostly by GCC Western expats

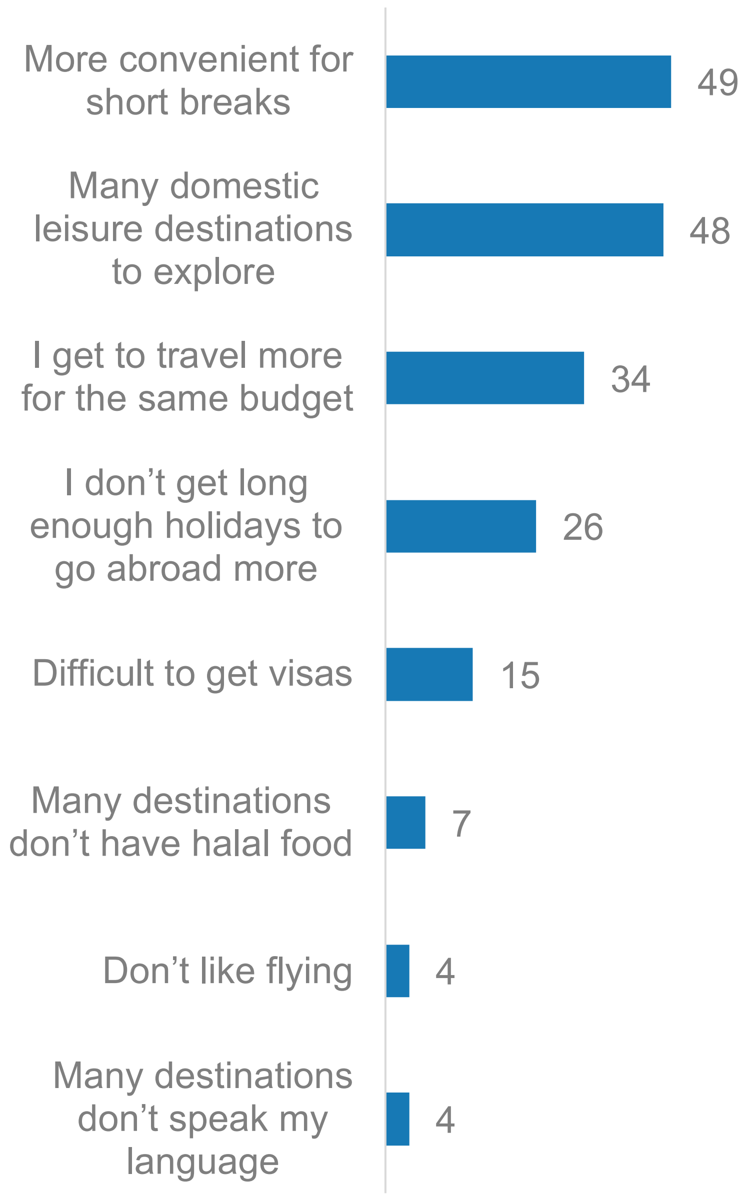
- **Indian Ocean**

DOMESTIC

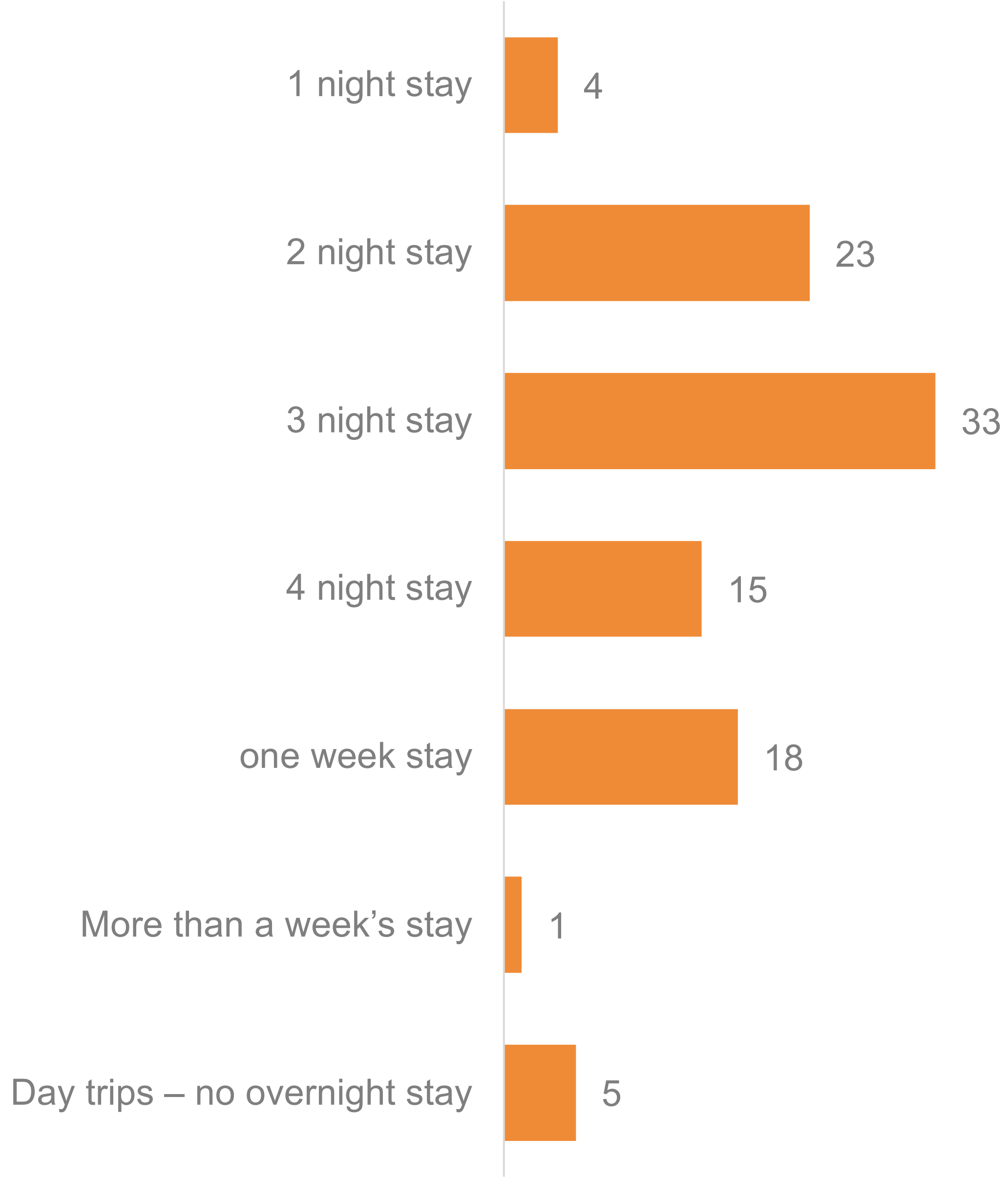
- **Levant, Egypt and Saudi Arabia** give their residents the opportunity to enjoy domestic breaks
- In Saudi, the Holy Cities of Makkah and Madinah are of course regularly visited by local pilgrims. Eastern provinces and Jeddah are also part of the Saudis favourite domestic destinations
- In Egypt: Alexandria, Luxor, Aswan and the Red Sea
- UAE: **Staycations** from strong to stronger with diversity of offerings and multi destinations

Domestic Travel

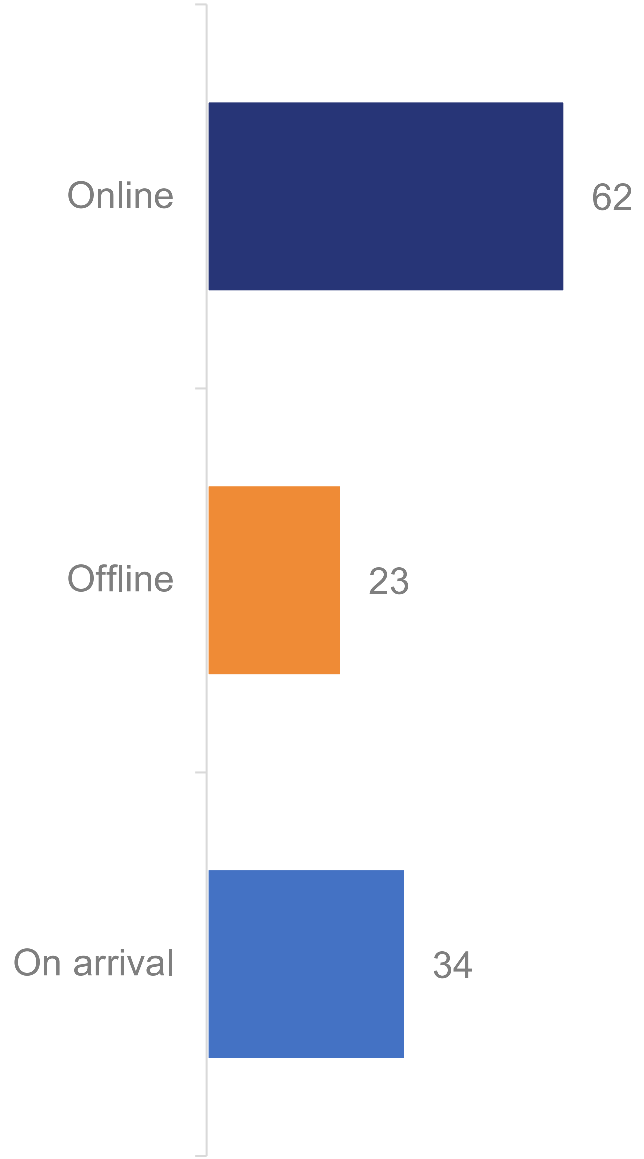
Reasons



Duration



Payment



Base: Domestic Travellers

Multiple Answers

Type of Vacations

- The same individual might have various types of vacations during the year: Family, Romantic, with friends break etc
- Arab Nationals (GCC Nationals, GCC Arab expats, Levant or Egypt categories) wives will not travel alone apart from visiting family members. Gents however might take breaks locally with friends (Desert safari, amusement parks, road trips, Dubai / Bahrain break)
- If on a family trip, activities for children will be a focus
- Among the youngest age group, couples and friends trips might be more adventurous (new destination, activities), and requiring less planning effort
- Travel trade interview respondents also confirmed a growing interest by travellers for cruise offers

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Traveller's Awareness, Mindset & Search Points

Traveller's Awareness

Active Awareness

Top-of-Mind Awareness

Online Search Points

Offline Search Points

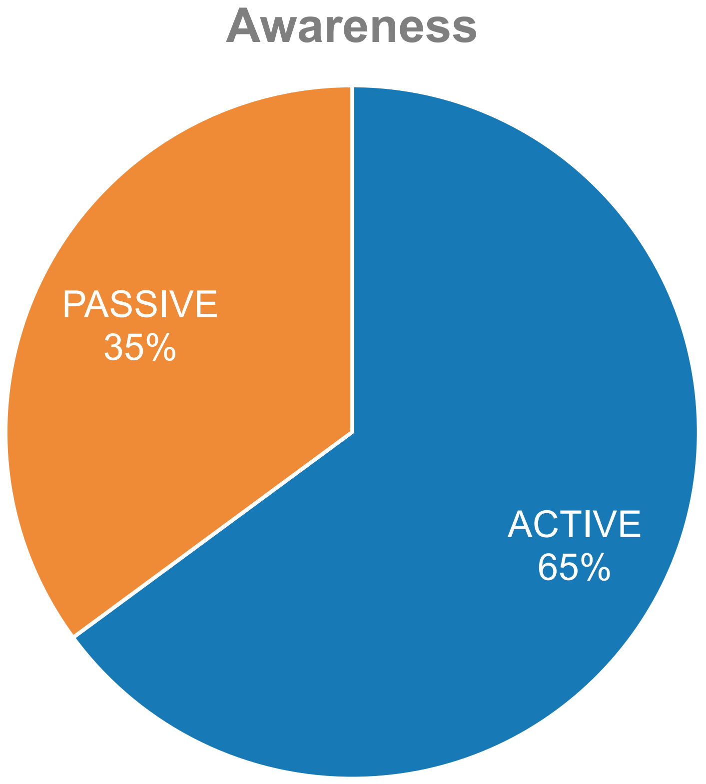
Search Points

Decision Process: Who Decides?

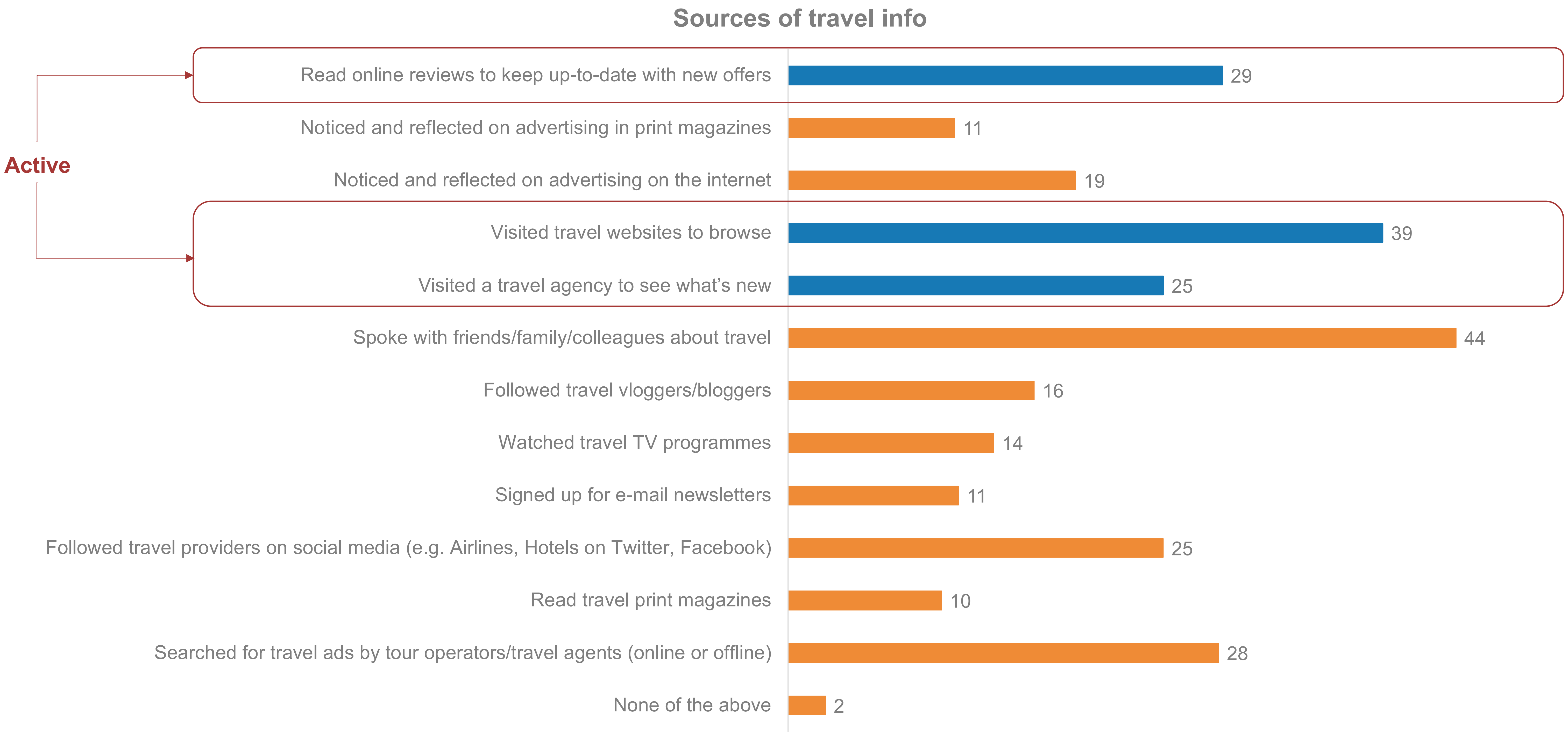
Source of Travel Information

A traveller's cognizance about a potential destination and its related activities is generally a result of combining Active and Passive points of awareness:

- **Active**
  - Search online during the dreaming phase: TripAdvisor, Trivago, (Online) Travel Agencies, Loyalty program offers (Hotels or Airlines)
  - Word of mouth (Family & Friends, Colleagues, older generations seeking advice from the younger generation)
- **Passive**
  - Social media influencers such as bloggers / v-loggers
  - Social media pages from OTA or Travel Agencies (Instagram, SnapChat, YouTube for example)
  - TV programs (documentaries) on Al Jazeera, ART and Discovery to name a few
  - Celebrities travelling
  - Traditional direct marketing such as e-mailing, newsletters (Groupon, Cobone)



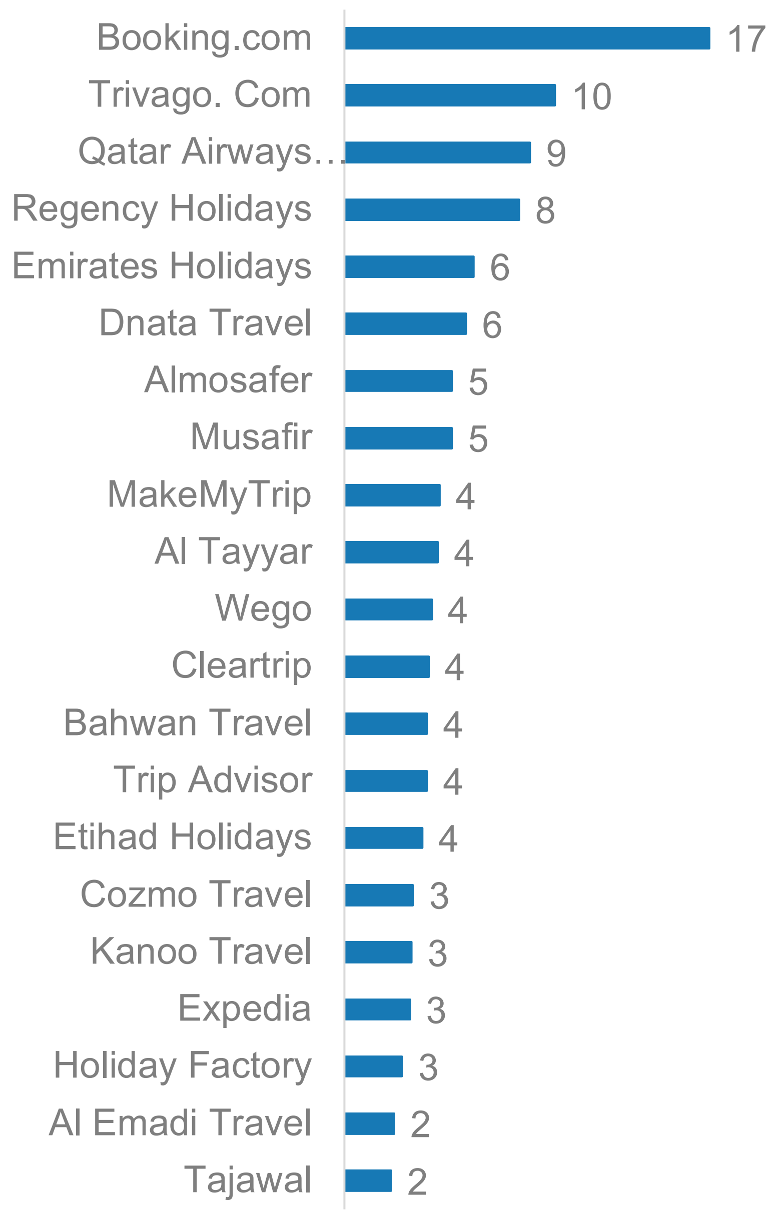
Sourcing Travel Information



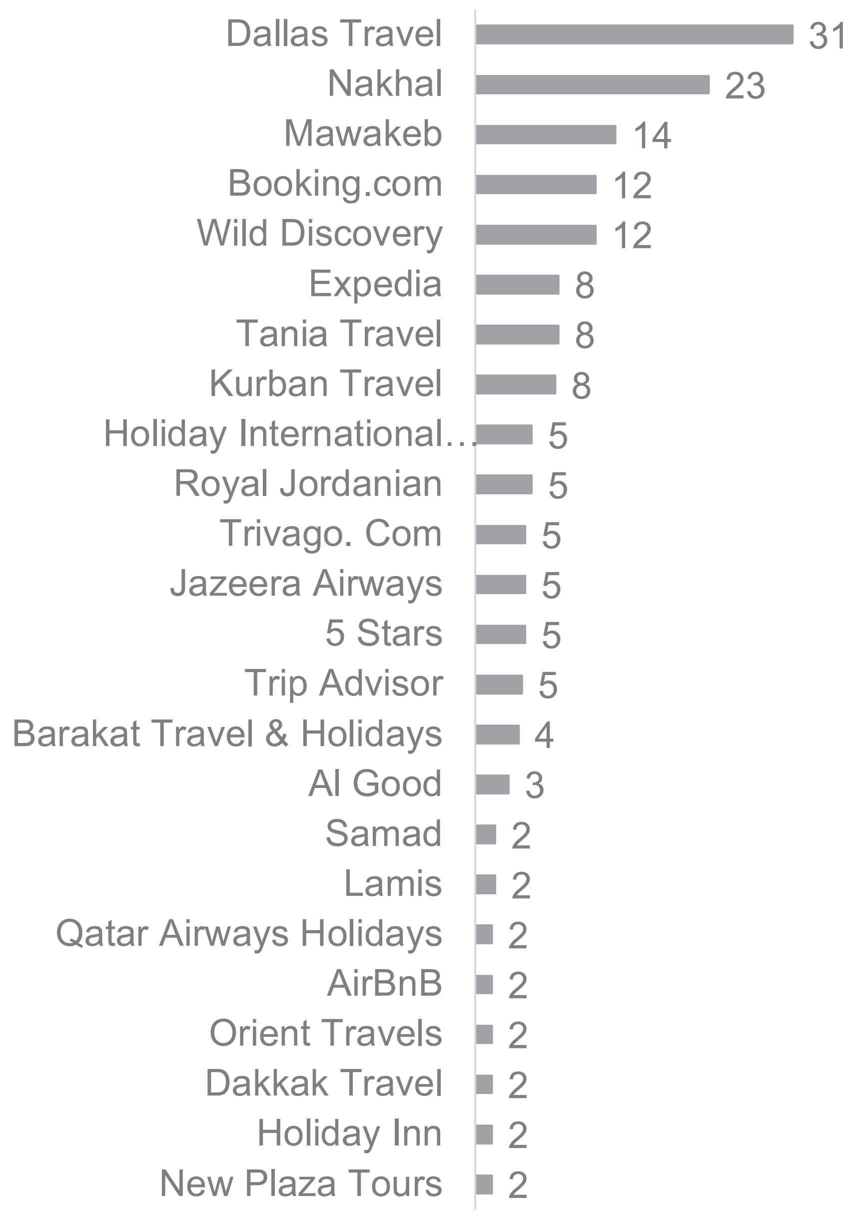
Travel Brands That First Come to Mind…

Egypt

GCC

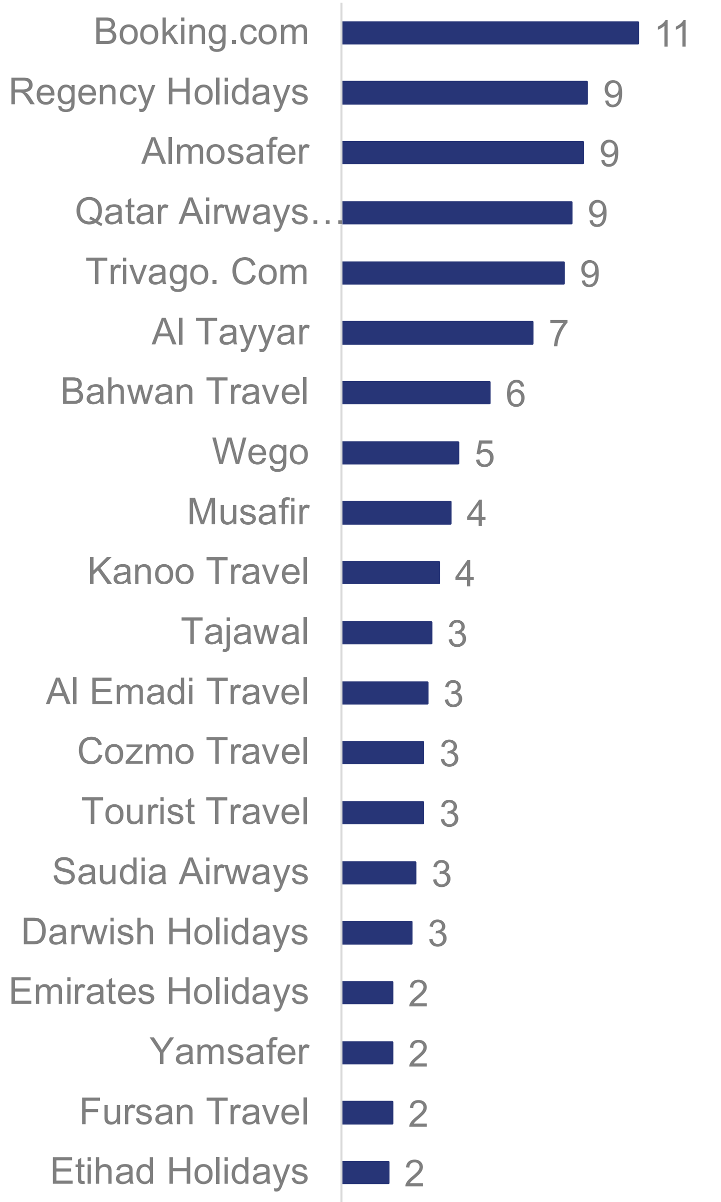


Levant

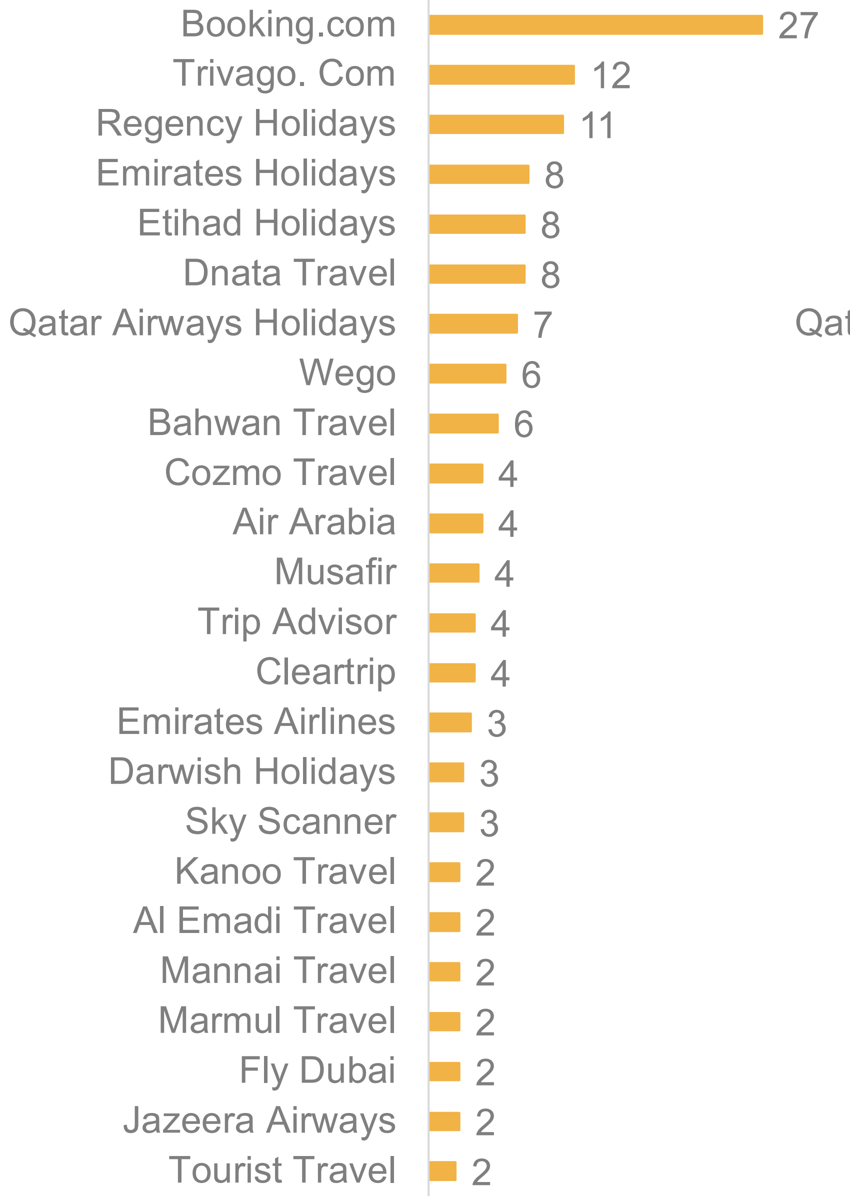


Top-of-Mind Brands

GCC Nationals

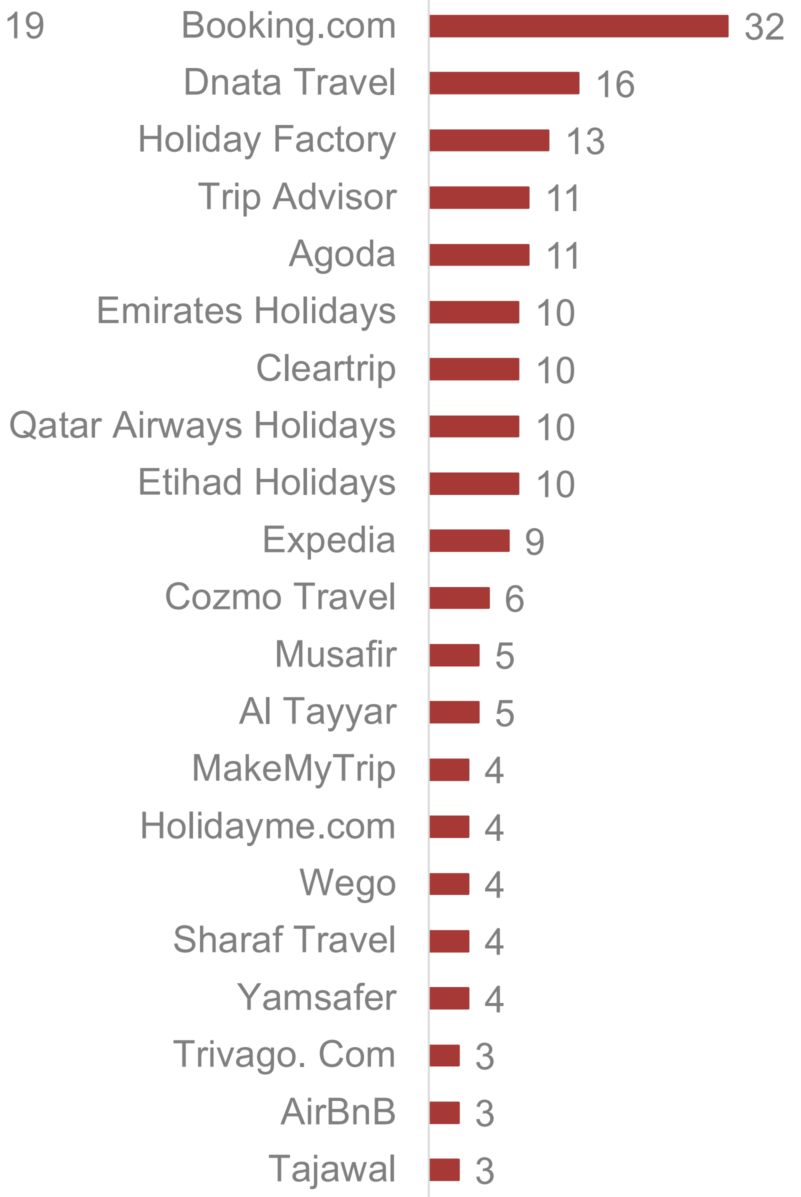


GCC Arab Expats



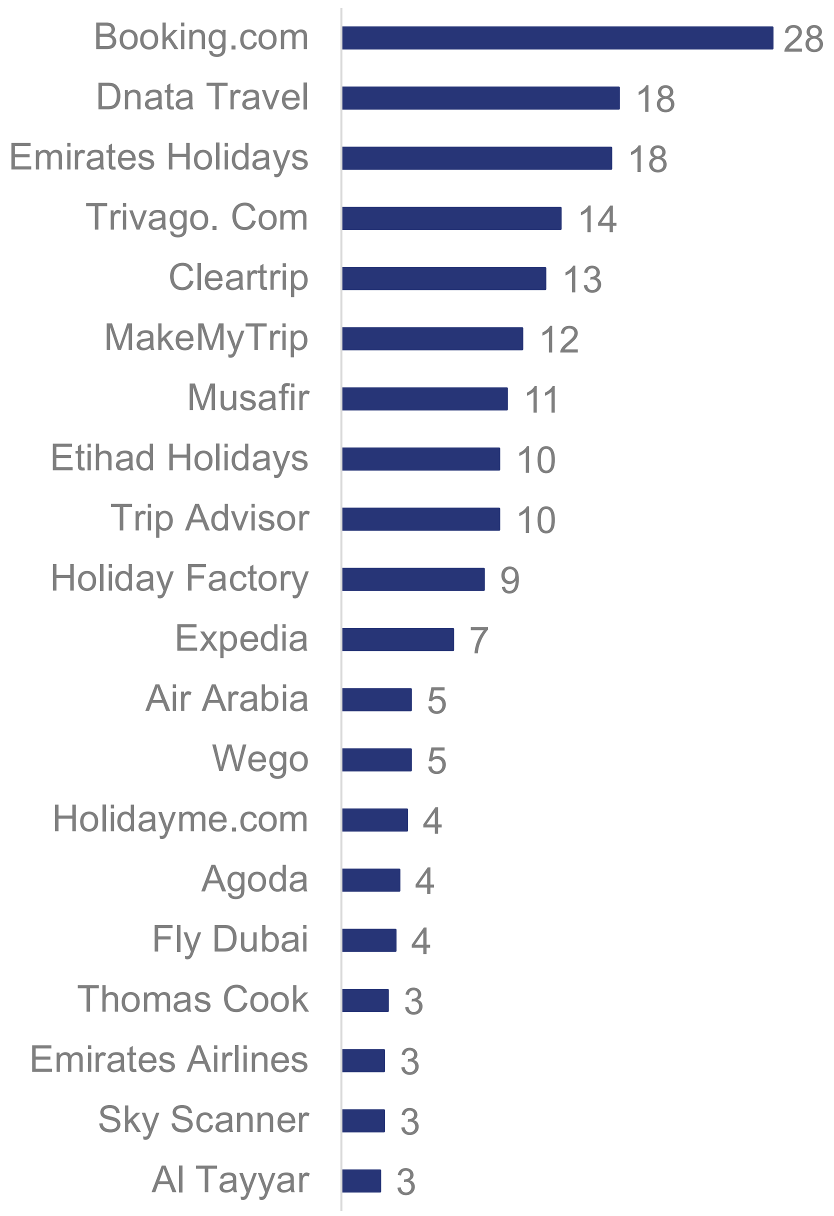
GCC Indian Sub-Cont. Expats

GCC Western & Other Expats

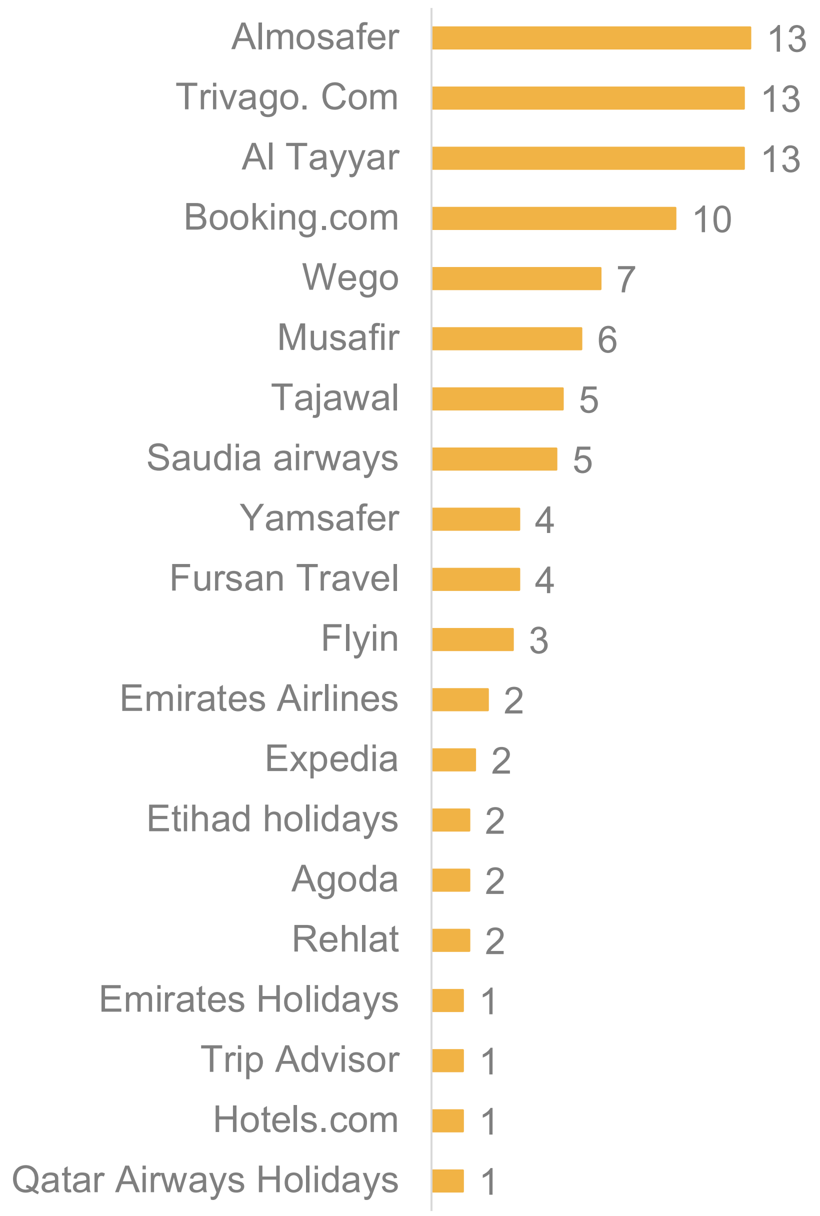


Top-of-Mind Brands by Country of Residence

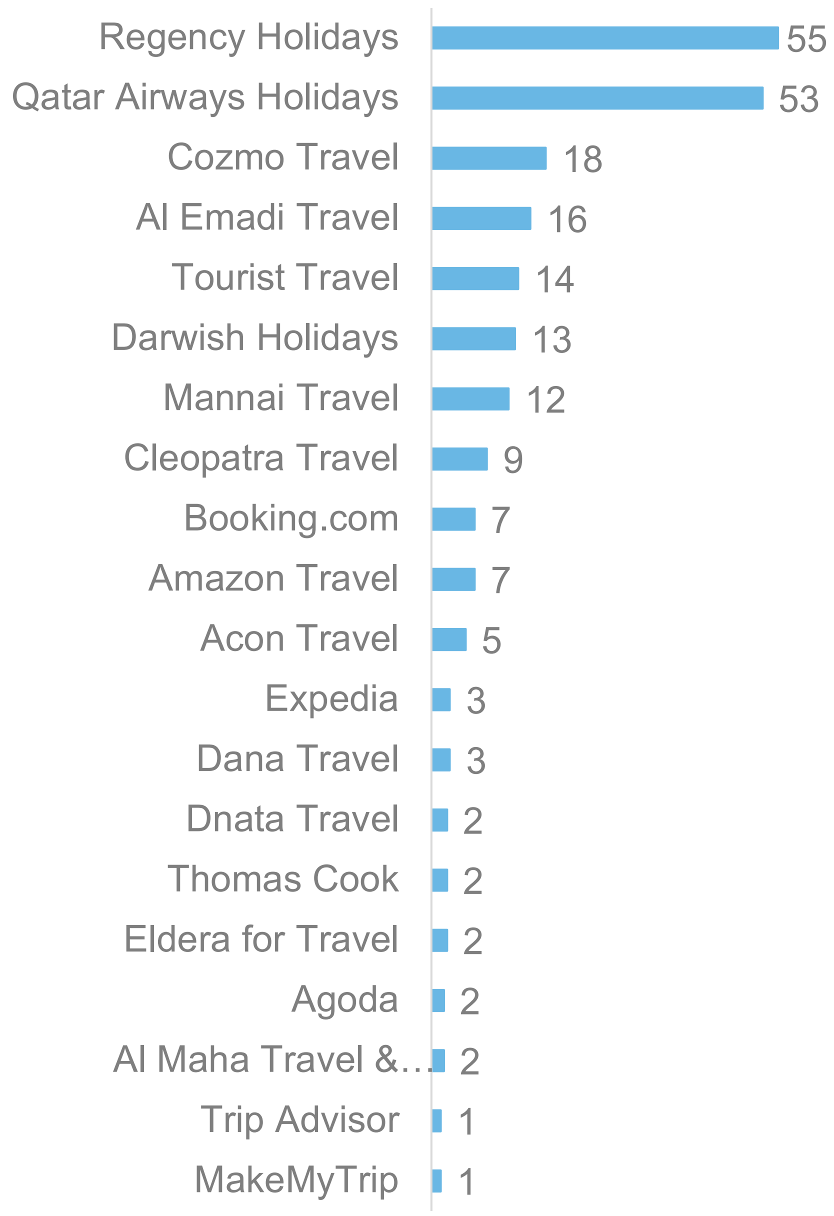
UAE



KSA

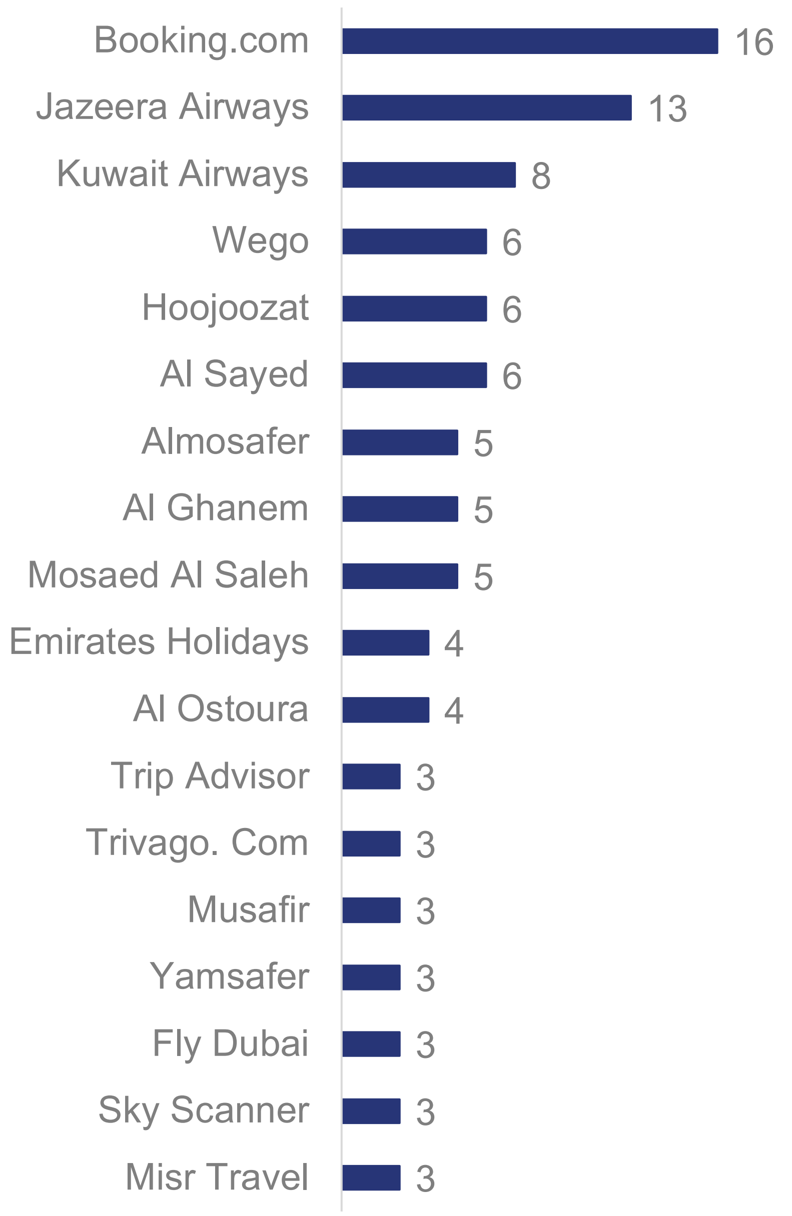


QATAR

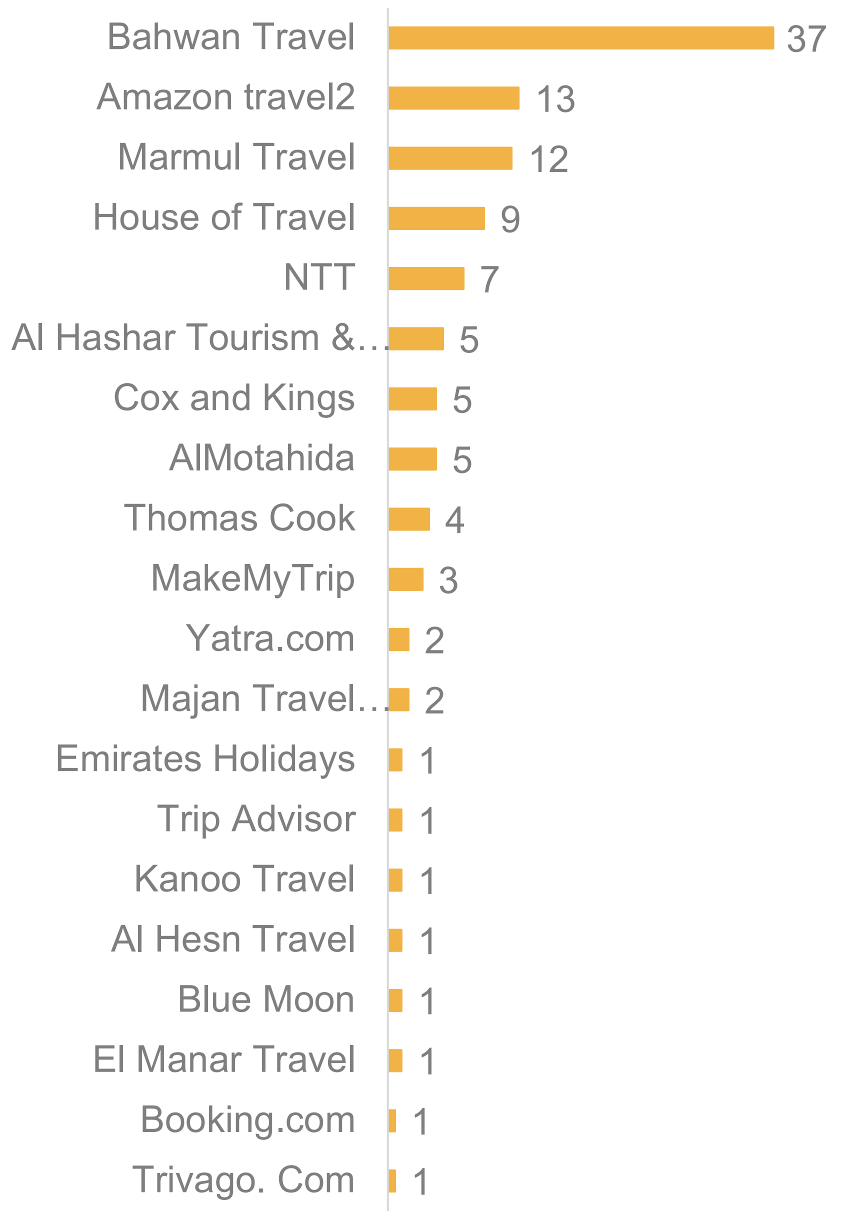


Top-of-Mind brands by Country of Residence

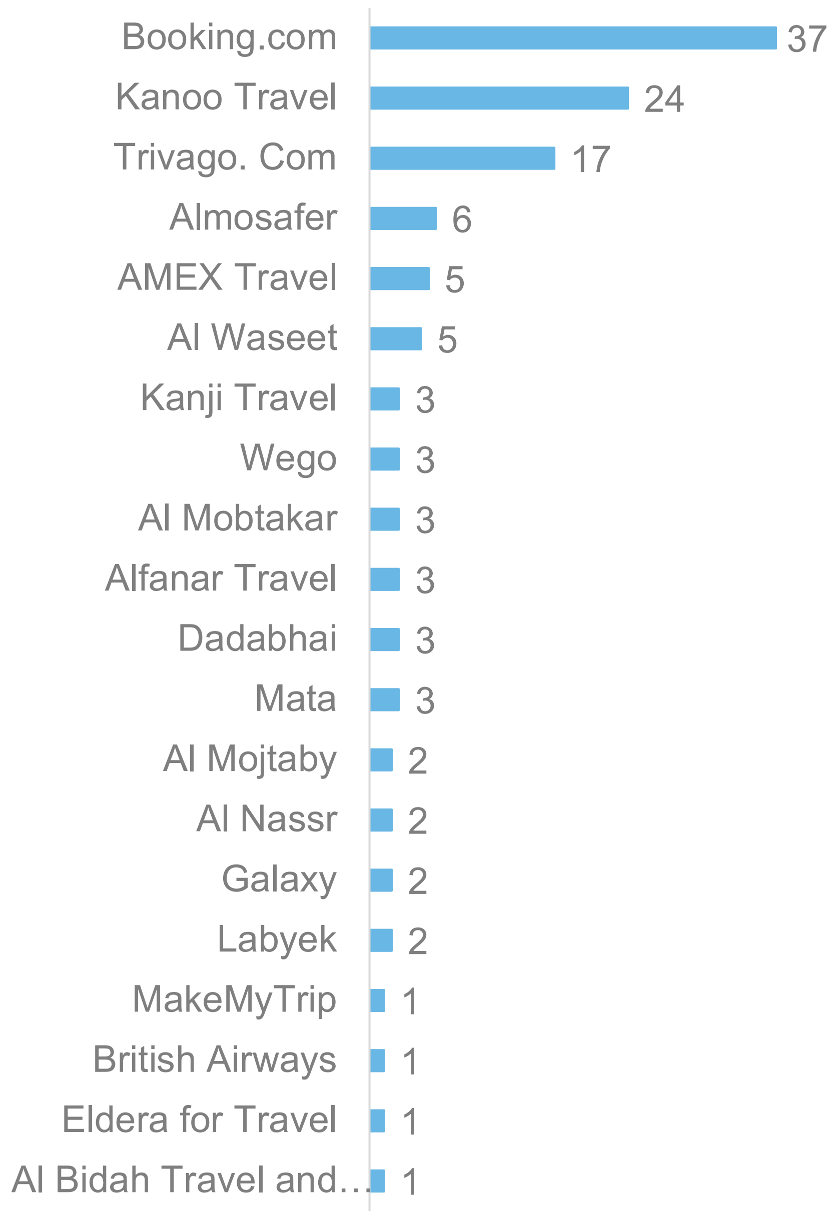
Kuwait



Oman



Bahrain



Top-of-Mind Awareness

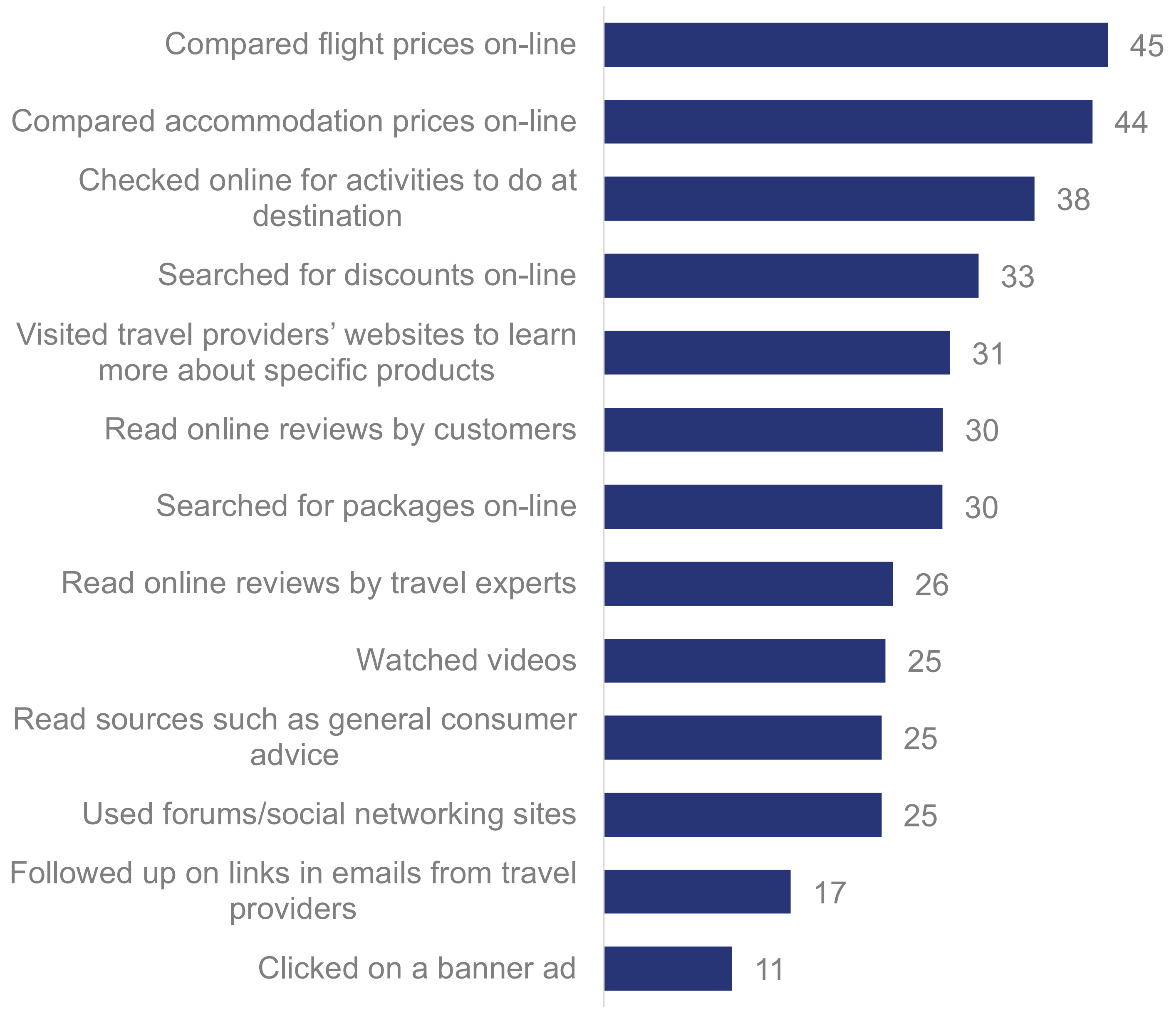
- These are the un-prompted travel brands identified by the survey respondents
- If on the overall sample, Booking.com and Trivago lead as travel site of reference with respectively 17% and 9% of the respondents sharing their name in the list of their preferences, tour operators such as Qatar Holidays & Emirates Holidays, and a regional OTA such as Mosafer are part of the top 10
- Traditional travel agents that have adapted their business models and created hybrid or stand-alone on-line platforms win big in the region
- In Egypt, the national carrier overtakes Booking.com and Trivago taking the 1st place ranking on the list
- In Levant, the top 3 identifies regional operators (Dallas Travel, Nakhal and Mawakeb) and Booking.com only ranks as number 4, Expedia as number 6 and Trivago 11th
- In GCC, Booking.com takes the lead in all categories except with GCC Expats from Indian Subcontinent for which Make My Trip (HQ in India) is the primary point of reference

“Booking.com is a household name that we all associate with travel but we are most comfortable working with home-grown brands.

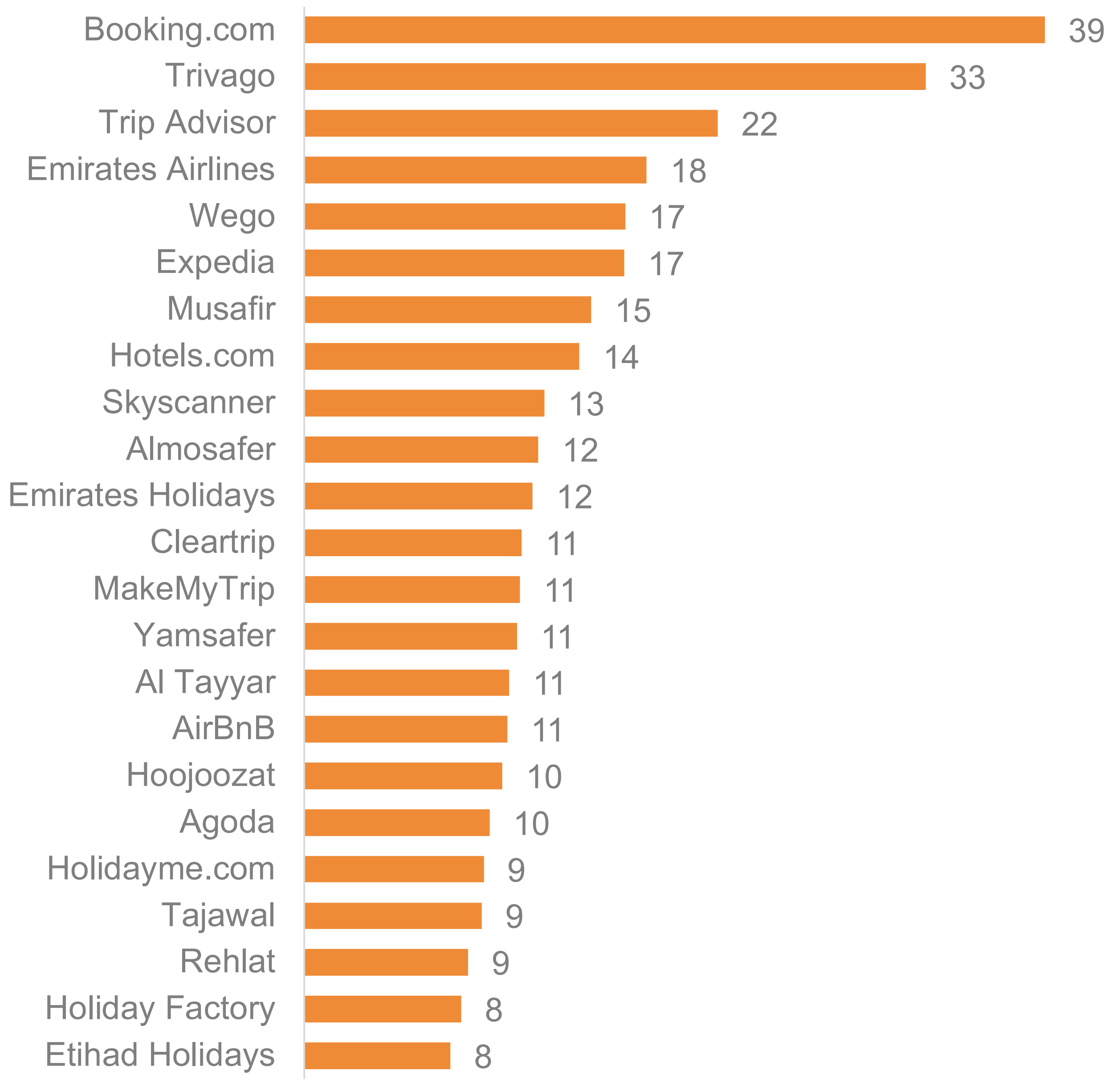
Unlock our DNA and enjoy our loyalty and following regionally and internationally”

Online Search Points

Process

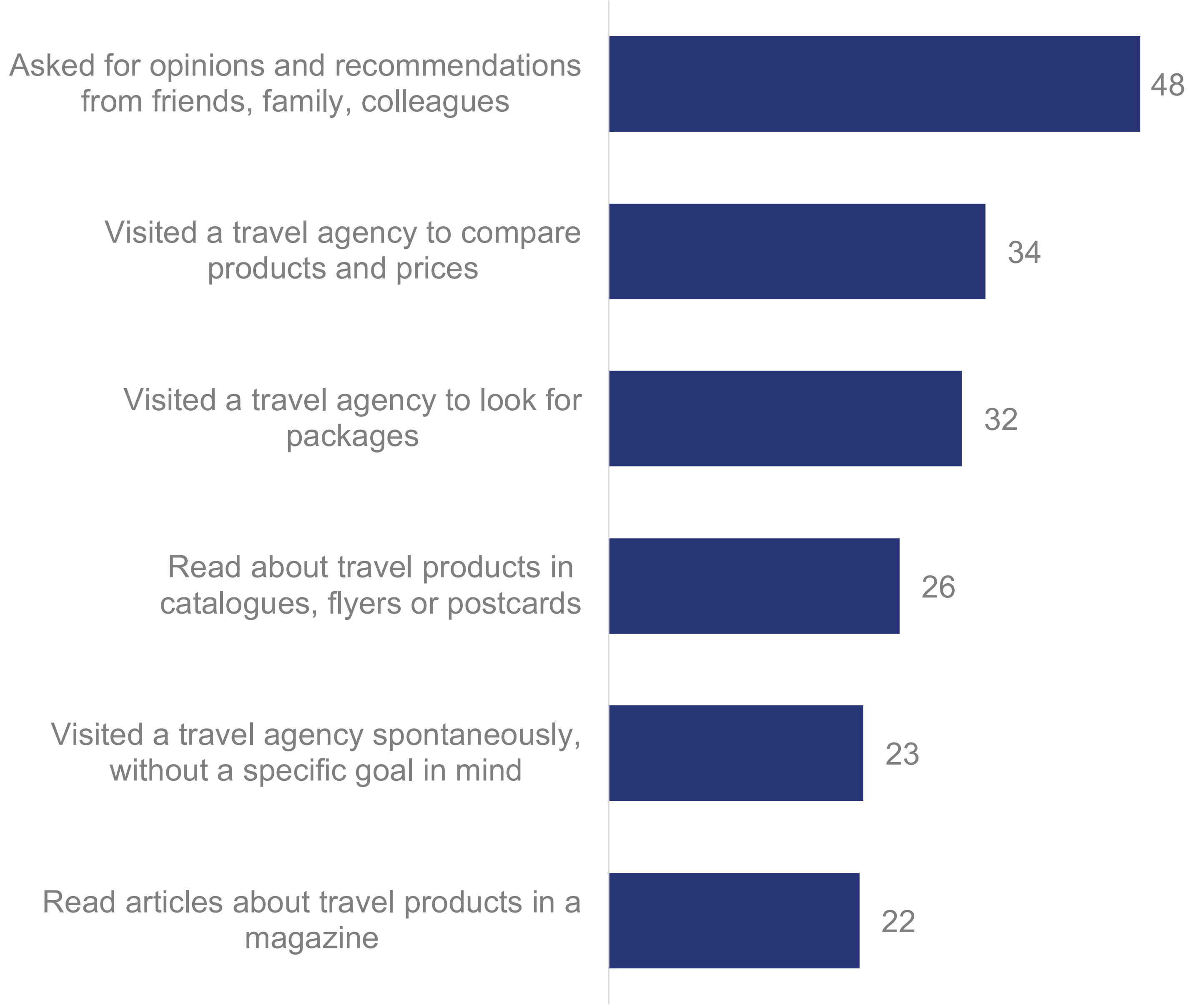


Top websites

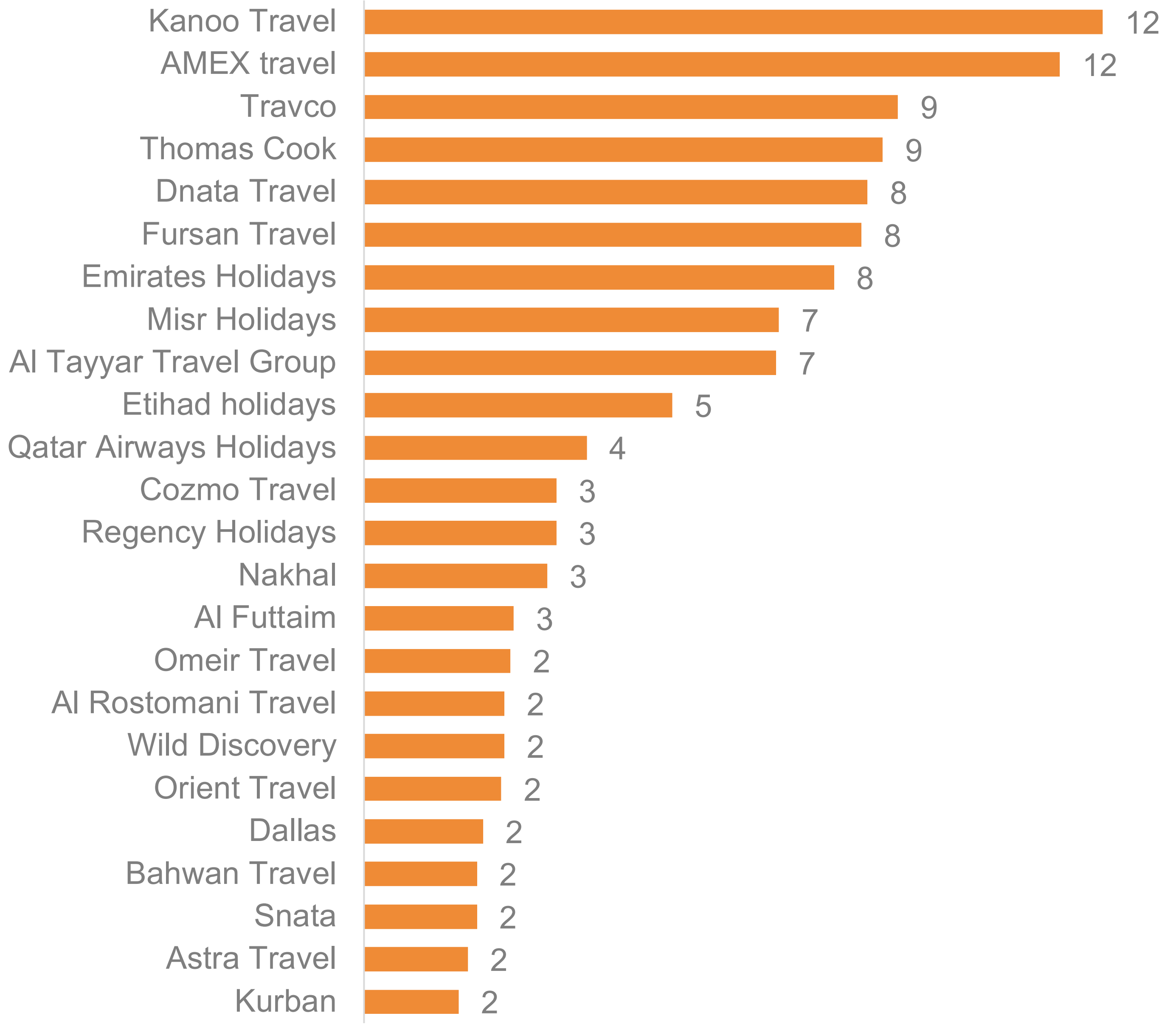


Offline Search Points

Process



Top Agents



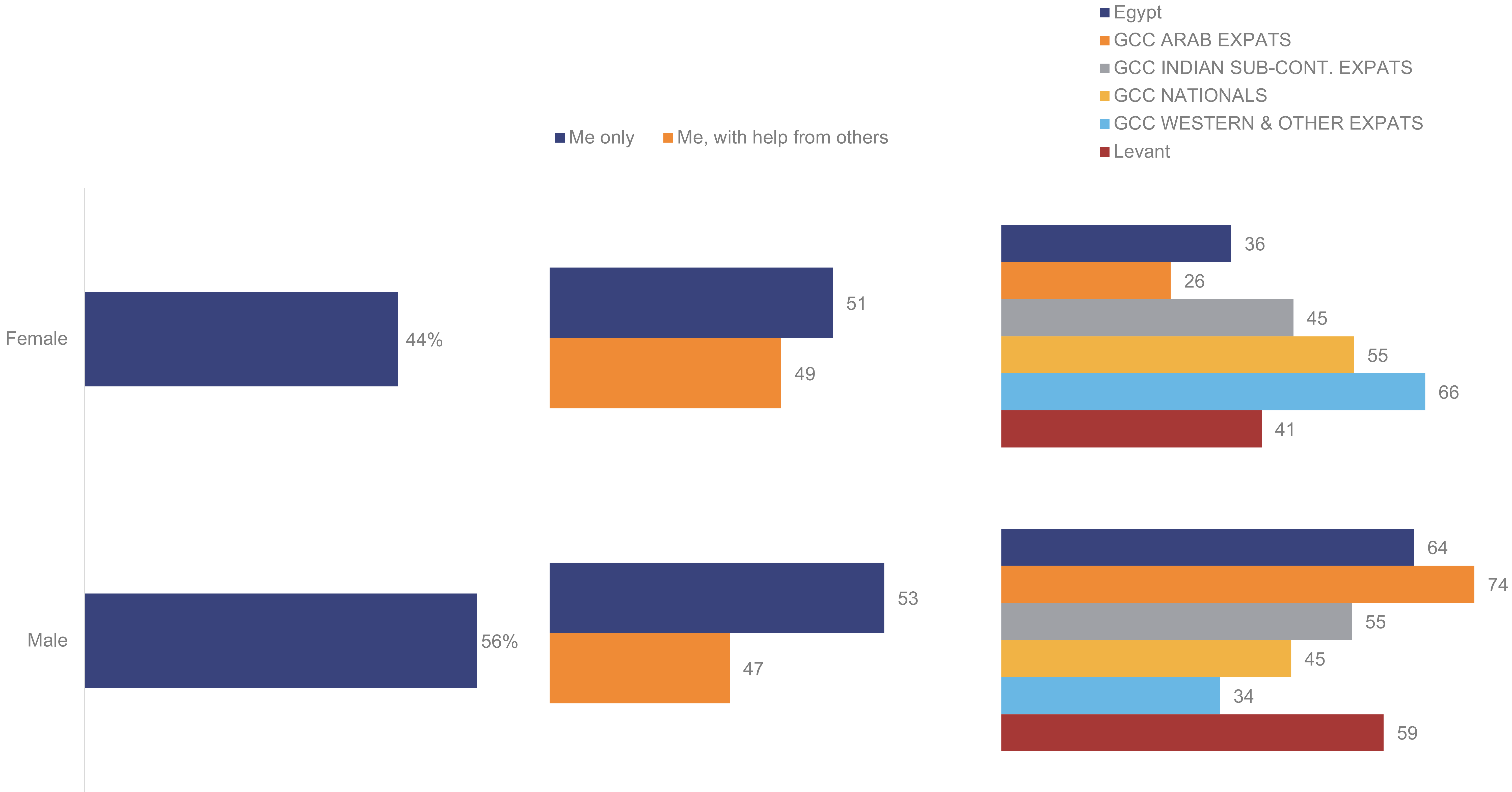
Search Points

- Booking.com, the first global OTA to localize content into Arabic, is used as an online search point by 39% of respondents
- Trivago which conducted extensive offline awareness advertisement campaigns in the region in the last 12 months, is the 2nd online search point and first meta search site used by 33% of respondents.
- It overtakes TripAdvisor (used by 22% of the respondents) which is not as widely used by Arabic speakers since only the desktop version offers Arabic language and the number of Arabic reviews is limited compared to booking.com
- Wego used by 17% of the respondents has been focusing on the Saudi & Egyptian market for several years now
- Emirates Airlines used by 18% of the respondents, is the 1st (regional) airline mentioned while Musafir, the first regional OTA with 15% of respondents. These results are influenced by the split of the sample surveyed
- Traditional Travel Agencies used appear to be very country specific

Decision Making Process:

Who Decides?

Decision Process: Who Decides?



Decision Process: Who Decides?

- If 53% of the males surveyed answered they were the sole decision maker for the vacation planning & booking, this is clearly and highly influenced by GCC Arab Expats (74%), Egypt (64%) and Levant (59%) respondents
- GCC Western & Other expats (34%) and GCC Nationals (45%) are more reliant on the female input
- Arab Nationals, females are pivotal in the process. They decide or massively influence the choice of destination, activities and shortlist hotels. They are in charge of the search phase. Gents will then set budget and quite often are the booker as most travel executives met confirmed
- For GCC Westerners and other expat groups, both ladies and gents tend to decide together
- For all categories, in the case of families, children influence directly or indirectly the decision. Parents select based on their needs and wishes, especially when they are young

“Don’t talk to me….appeal to my children and talk to my female partner.

I may book, as well as pay but she knows us best. She is our travel planner”

INSIGHT OUT

Influencers

Friends, Family & Colleagues

Social Media & Influencers

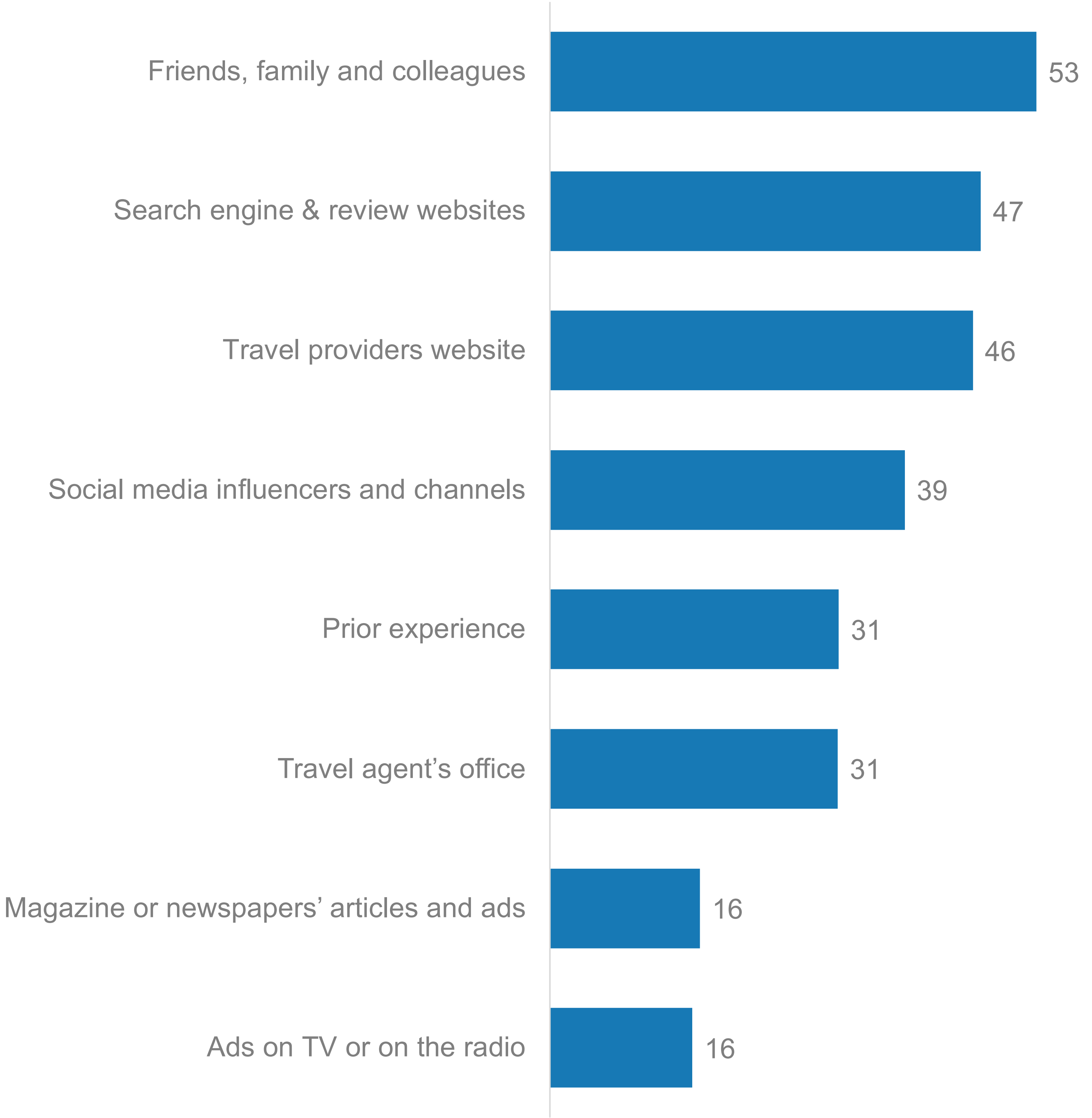
Offline Communication

Suppliers & Travel Agents

Influencers

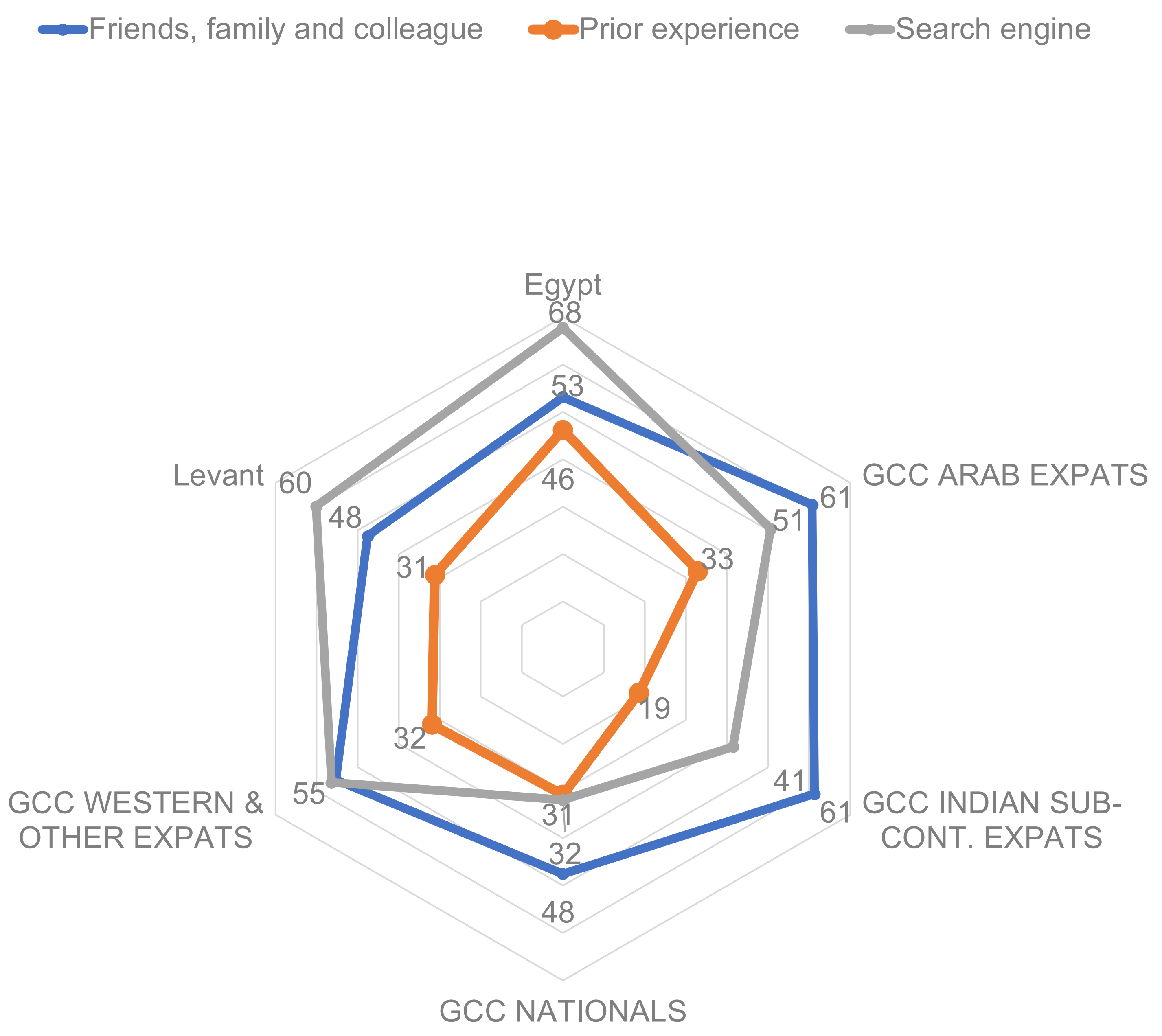
Influencers

- Besides the information collected during their active search process, some key stakeholders will influence the travellers choice in regards to the Destination, Activities, Flight, Accommodation etc
- 53% of respondents admitted being influenced by Friends, Family & Colleagues
- 46% are influenced by travel providers online sites, 47% by search engines and review sites
- Only 31% were influenced by the Travel Agent



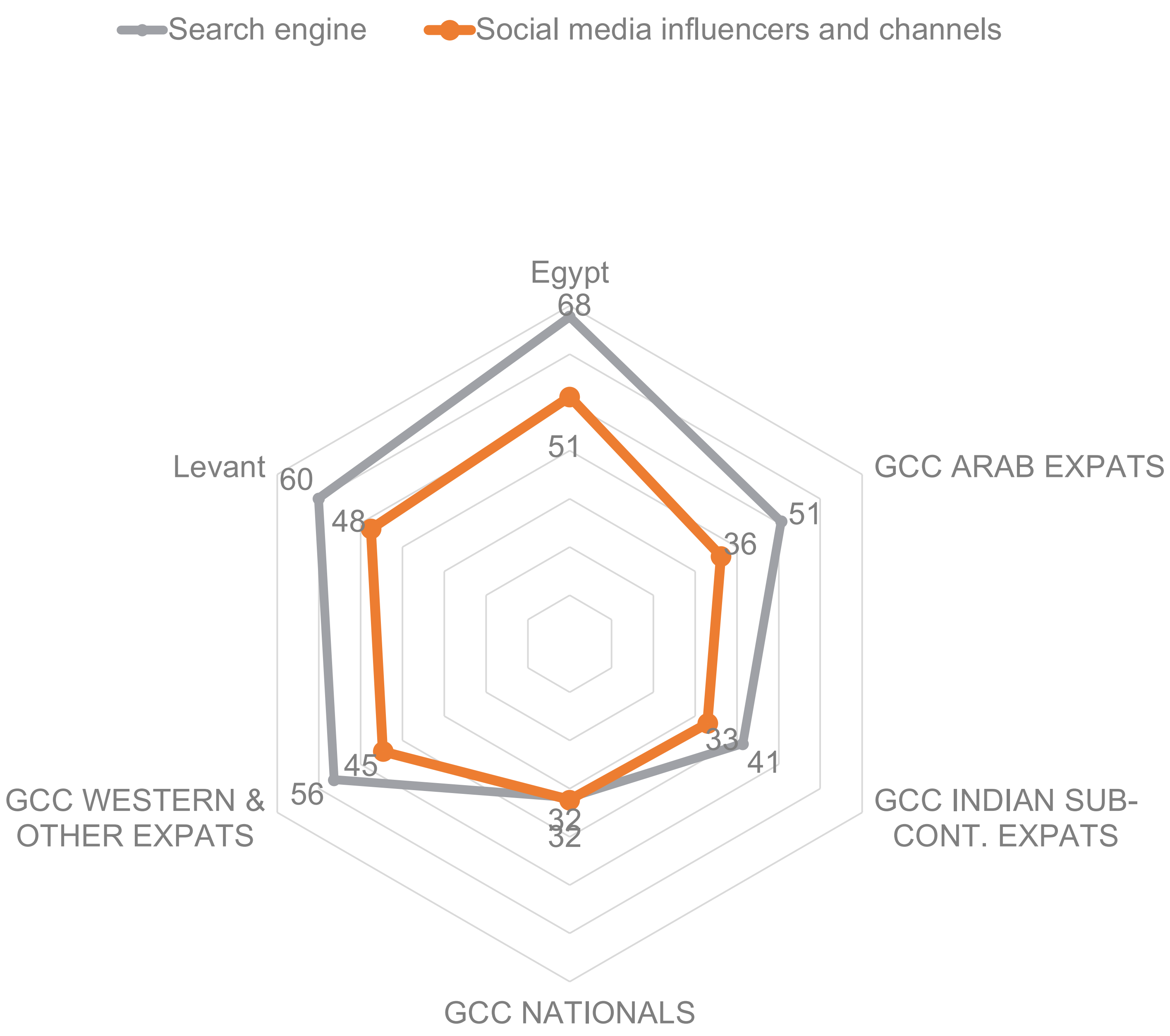
Friends, Family and Colleagues

- For GCC Nationals, GCC Arab expats, GCC Indian Subcontinent, the FF&C influence is more impactful than search engine reviews
- FF&C will influence the choice of destination, activities, and hotels. One satisfied family will refer another family
- Influence penetrates different age groups. Younger generation will influence the older ones seeking advice
- When looking at reviews, focus is on those in Arabic (though still limited) and from similar demographics to choose hotels and activities
- Only recent reviews from peers, in native language and from trusted sites (Trivago, TripAdvisor, Booking, Mosafer) are considered
- For GCC Western & Other expats, Egypt and Levant, reviews are more important than FF&C



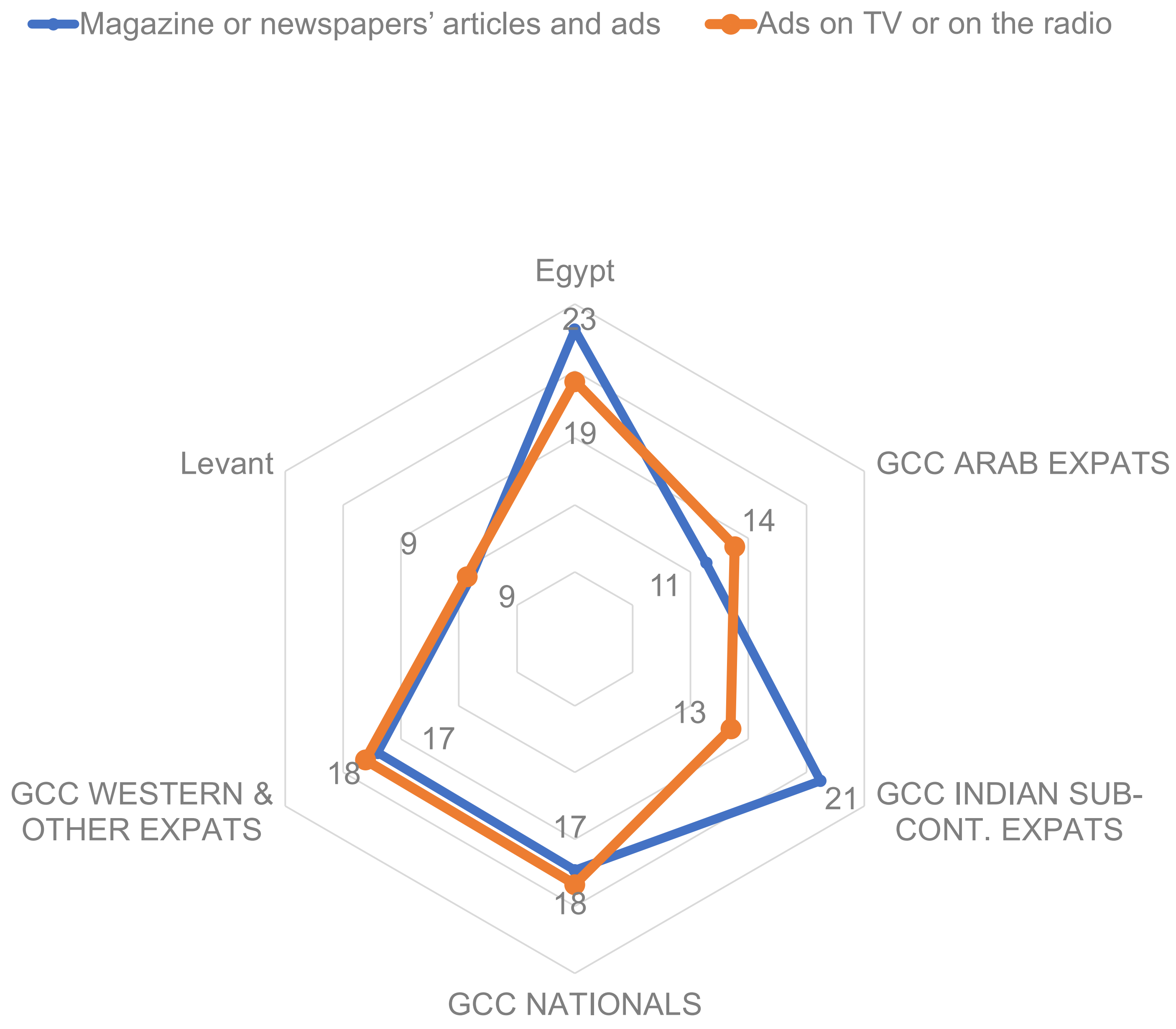
Social Media and Influencers

- Social media and social influencers such as v-loggers are considered however not always trusted which explains the lower weighting in the process
- Travellers suspect that social influencers opinions are biased as paid by hotels or destinations, negatively impacting their credibility
- From a platform point of view, Facebook is still in use however Instagram and Snapchat are growing quickly and potentially overtook Facebook in some categories and age groups
- SnapChat is key in Saudi especially among the 21-30 years old sector
- Travel videos are watched on Youtube and Instagram



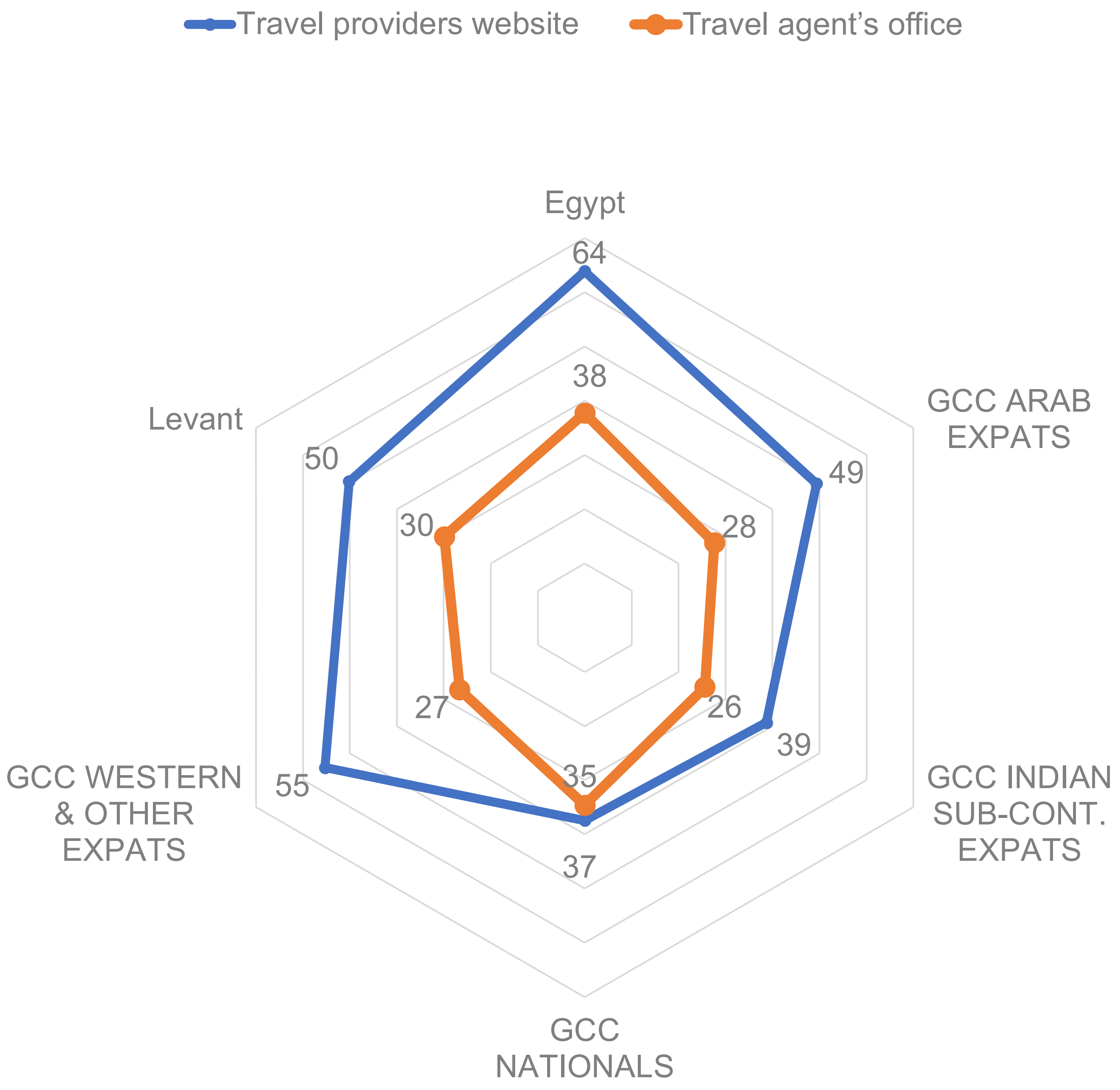
Offline Communication

- Offline communication is now marginal and more related to passive awareness and influence
- It contributes to the promotion of a destination and activities at the dreaming phase
- All the Offline atrial is now more inspirational even if not evenly important across categories
- TV and radio advertising is less effective in the Levant region
- Print advertising is most effective for the Egypt and GCC Indian sub-continent nationals



Suppliers & Travel Agents

- Travellers will mostly visit a travel site or a travel agency ready to book. They have already made up their mind or have a shortlist of destinations based on FF&C
- At this point in the journey it is less relevant to physically visit a travel agent and remote interactions with a call center or live chat of an OTA is adequate
- For the travellers who still visit a travel agency, they are generally seeking advice on their shortlisted destinations, or customization of a package
- The more complex a trip is, the more important and relevant a visit to a Travel Agent becomes



Suppliers & Travel Agents

- Where no choice is established, based on the type of vacation desired and budget, travel agents will help
- Travellers will reach out to several travel agents for the fastest response, with the most reliable information and will book with the one who had an interesting suggestion of activity for instance
- Couples are generally quite flexible on destination and advice. More than two travellers become harder to influence
- Over time, some travellers develop a trusted relationship with their travel agent who can make recommendations that are carefully considered

"The Agent must understand the needs and adopt a consultative approach. The job of the Agent is to package the client's requirements at best within the defined budget."

Quote from Trade Interview

I | O

“Today we need experiential advice not destination advice. We can use an app or search the web for getaway destinations, run cost comparisons and book.

What we cannot do well is construct complex itineraries for our family groups and difficult travel plans”

INSIGHT OUT

Considerations

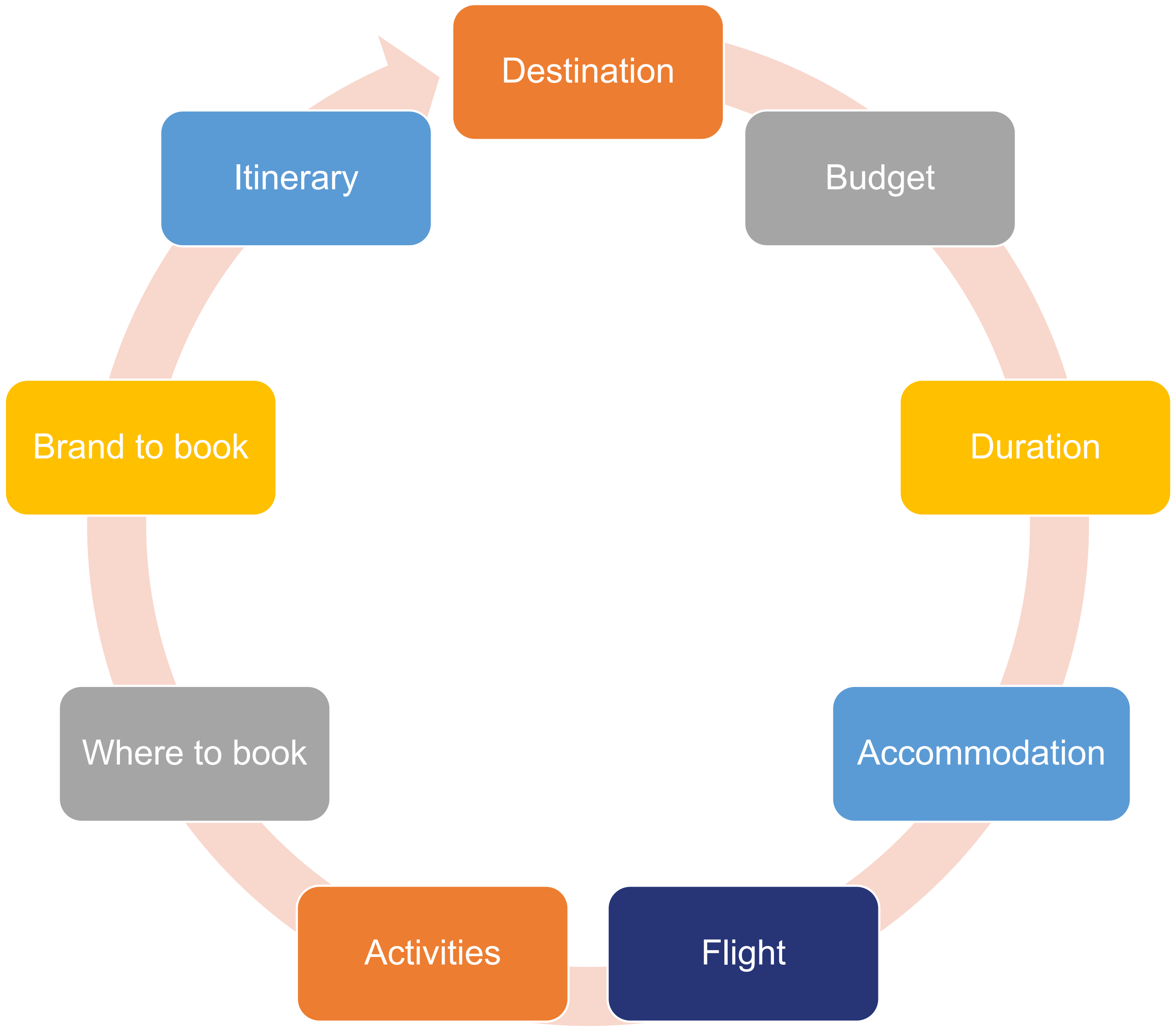
General Considerations

Geopolitics and negative perception of the Destination

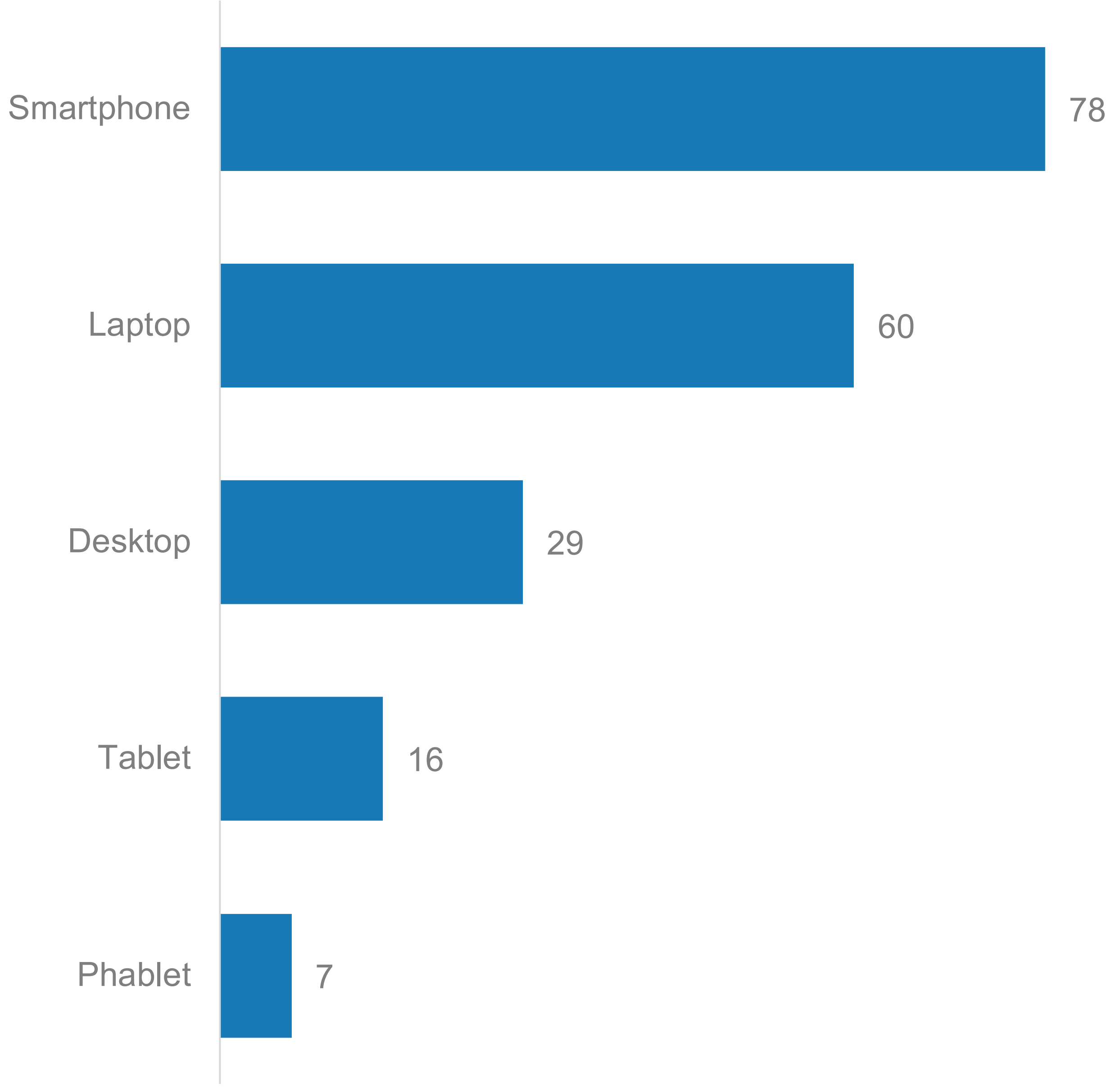
Visa requirements

General Considerations

Decision cycle



Device used for search



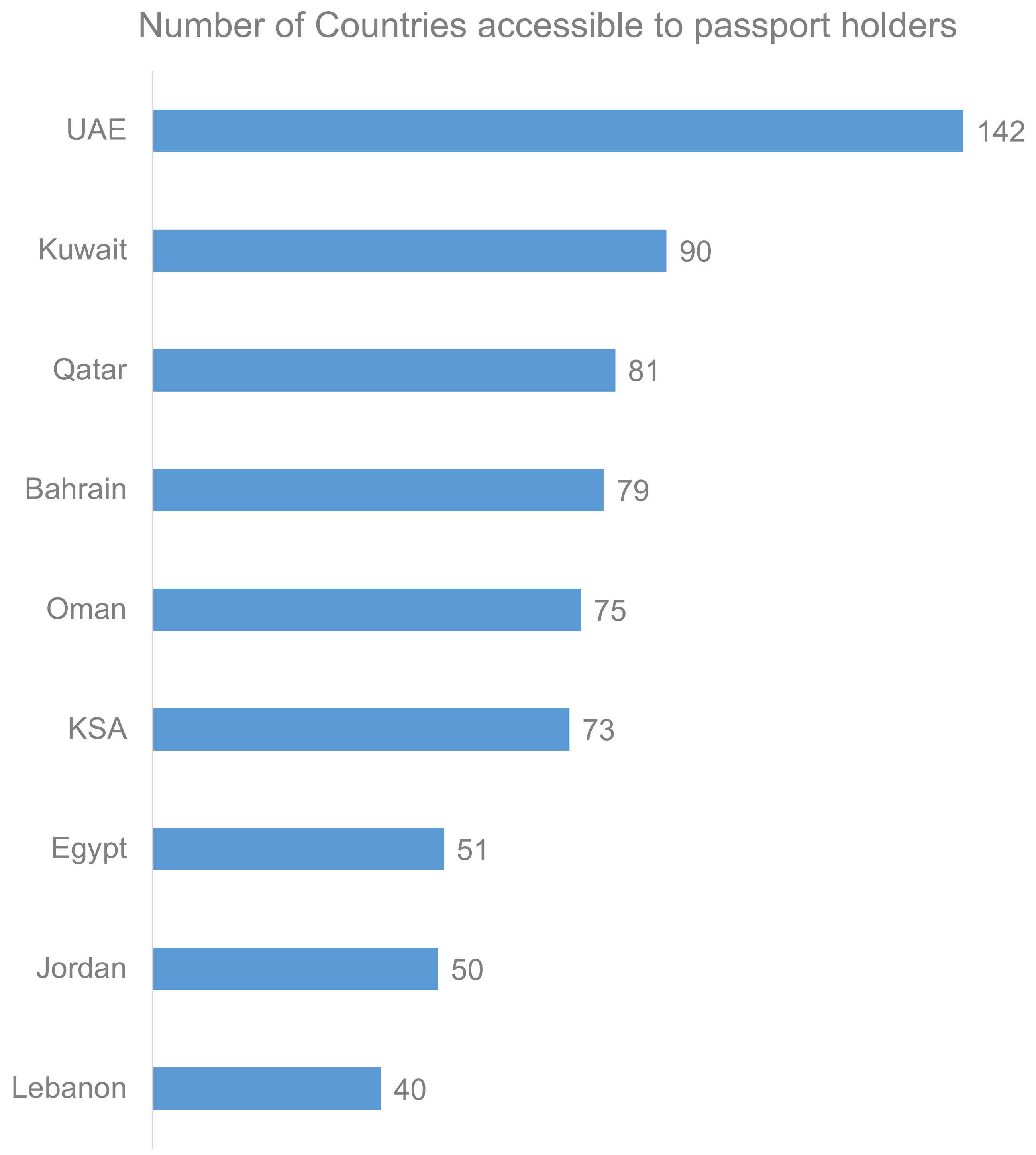
Multiple Answers

Geo-Politics and Negative Perception of the Destination

- Linked to the importance of safety and security like all travellers, Middle East travellers are concerned about the risk linked to geo-politics issues
- Middle East travellers show a certain resilience and are quick to resume travel plans. An example is the European capital cities after terror attacks or Turkey after political unrest and Lebanon for which travel bans or restrictions will advise travellers not to fly there
- Safety and security becomes a more crucial consideration for married men. They feel highly responsible and accountable for the safety of their wife and children

> "When I travel with my family, I try to be more careful in choices because I am responsible for their safety, and this differs when I travel with friends where we can take part in wider and more adventurous activities."
>
> *Focus Group Respondent*

Visa Requirements



- Visas are a key consideration for travellers
- They influence the short-listed destinations and the lead time involved in the preparation of a trip as well as the budget
- It influences the third-party used to make the booking: in some cases, travellers will decide to book via a travel agent in order to get assistance with the visa process

- UAE nationals do not require visas for most countries. They are the only GCC passport-holders with easy access to Europe and US
- KSA, Qatar, Kuwait, Bahrain & Oman nationals require visas for Europe and US but not to for South East Asia
- Egypt, Lebanon & Jordan nationals require visas for most countries
- Indian nationals are in a similar situation since they can travel to 58 countries (South East Asia mainly) without visas
- Sri Lankan and Pakistan nationals are much more restricted
- In the GCC Western & Others expats group situations are varied: Most Western with Schengen passports can enter over 140 countries without visa, 112 for Russians including SE Asia but not Europe, Filipinos can enter 60 countries

INSIGHT | OUT

Evaluation

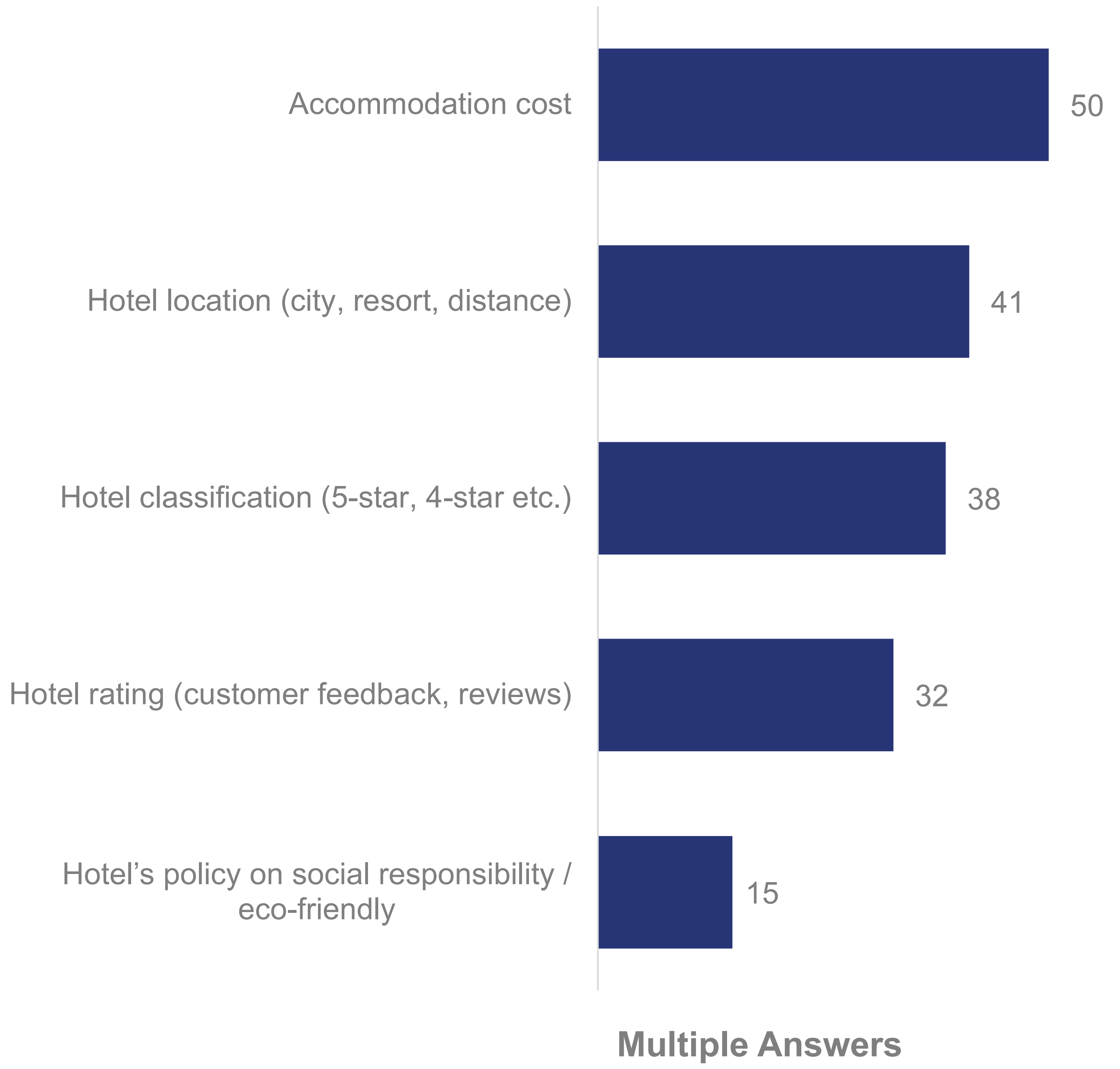
- Budget
- Destination evaluation
- Hotels
- Flights
- Activities considerations
- Activities
- Food options
- Price comparison
- Search Cycle vs. Effort

Budget

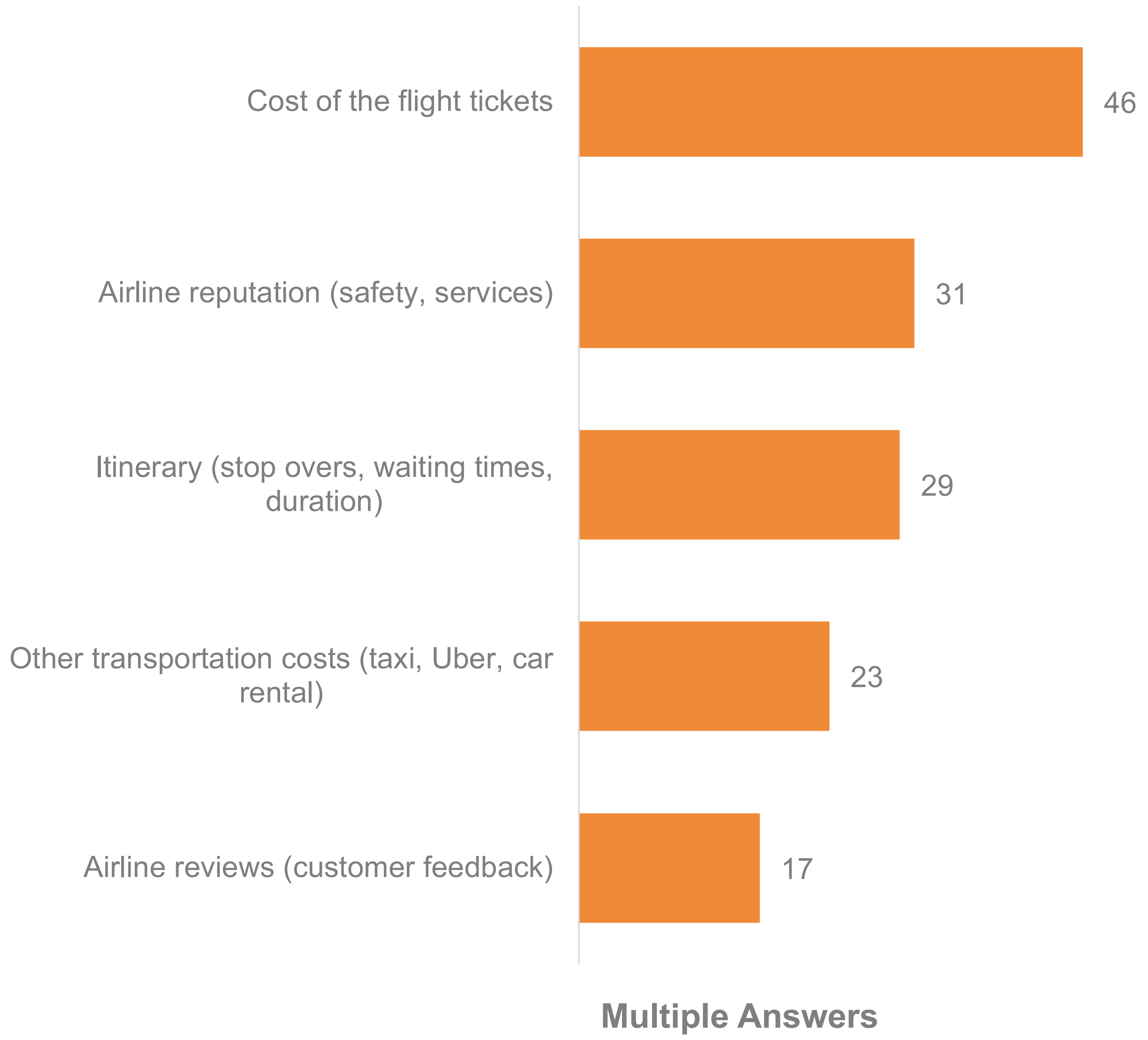
- Budget is discussed at all points of the journey however defined after the destination is selected. In a region that likes to travels, spending less per trip means, increase in frequency
- **Accommodation:** Cost is the first evaluation point when selecting accommodation as mentioned by 50% of respondents
- **Flights:** Similarly, 46% of respondents placed the airline ticket cost as main criteria when choosing the flights
- **Activities:** Still placed as 1st criteria, cost of activities is nevertheless only mentioned by 34% of the respondents
- **Others:** 23% of respondents consider other travel associated transportation costs such as airport transfers, taxis etc

Destination Evaluation

Accommodation



Transportation



Hotels

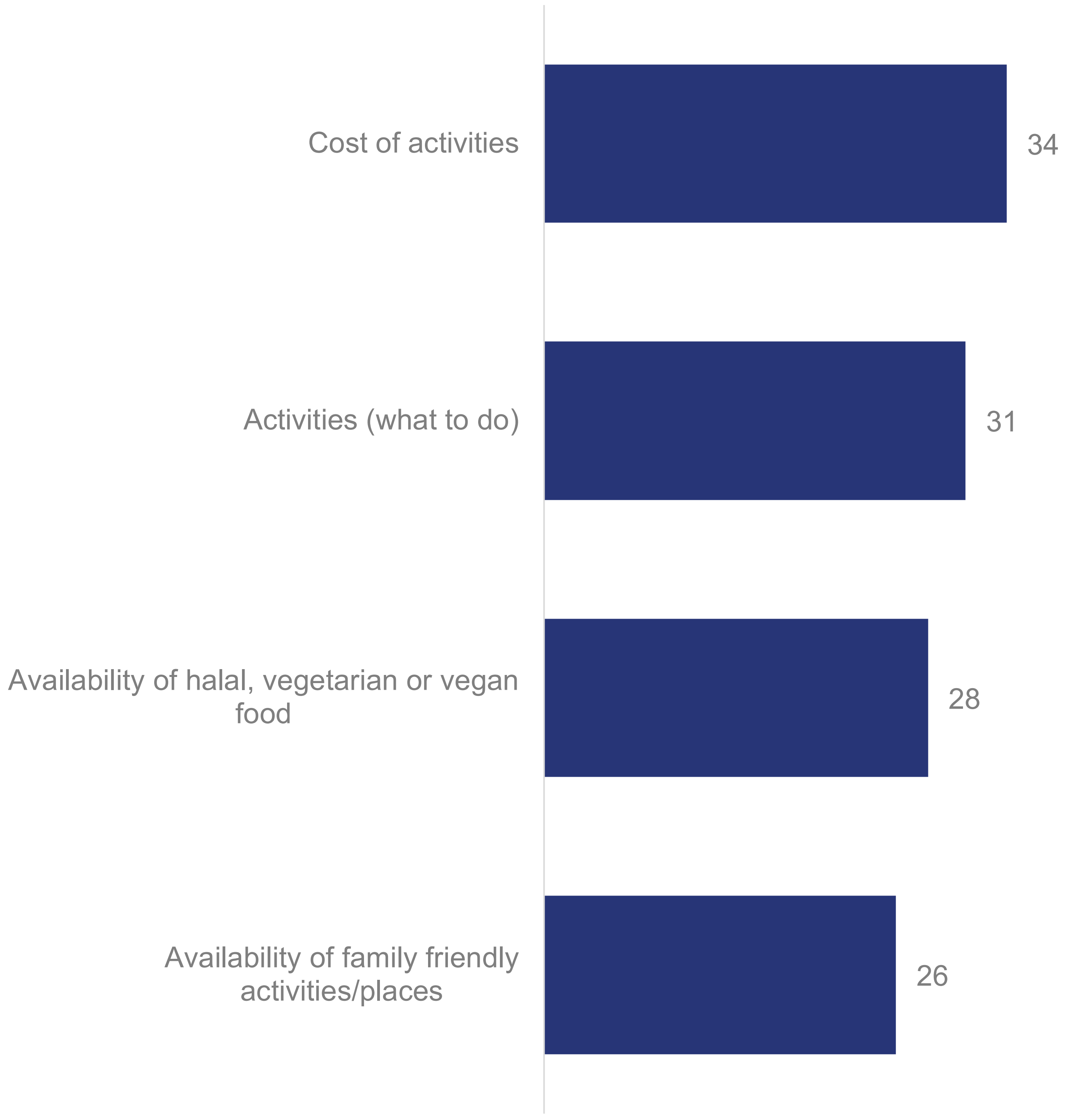
- The location of the hotel is a key concern for 41% of respondents. Proximity to landmarks, transportation facilities but also a safe environment / location support their responses
- 38% look at the official hotel classification to make their choice
- Ratings and reviews are mentioned by 32% of respondents. Travellers trust their peers and will select reviews of past travellers to whom they can most relate (type of vacation, families, cultural background, language of the review). Poor hotel reviews will result in the exclusion of the hotel on their shortlist
- Branding and loyalty programs (an opportunity to be awarded points or redeem some earned during business trips) contribute to their evaluation process
- For business trips in particular, the location of the hotel was the primary criteria even ahead of the cost
- Eco friendly and social responsibility criteria are only highlighted by 15% of the respondents as a significant factor in their evaluation as confirmed in travel trade interviews and focus group discussions

Flights

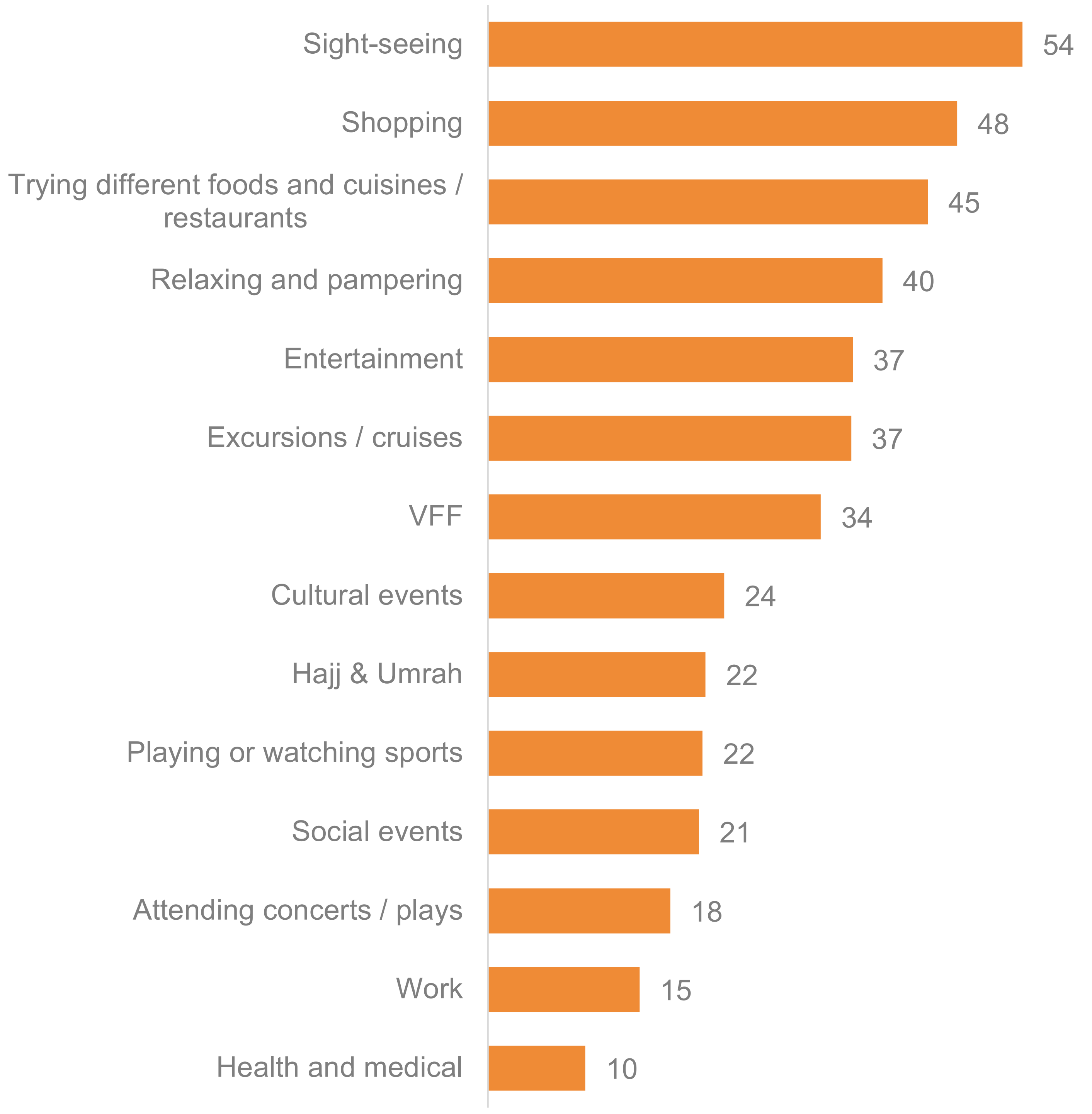
- The airline reputation, its services and associated safety record is evaluated by 31% of respondents. Reviews are only viewed by 17% reflecting a commoditization of air transportation. Hotels are much more complex to choose than flights
- The itinerary is more important since 29% of travellers highlight the duration of a stop-over, or trip will influence their decision
- Direct flights are a preferred choice however an in-direct service might be considered if the cost saving justifies the inconvenience or is seen as an added benefit when a stop-over can be added to the trip
- Similarly for hotels, loyalty programs might influence the choice of the airlines (awarded points or redemption opportunities)
- All traveller groups have a preference for the economy cabin. GCC Nationals though are more likely to book premium cabins

Based on qualitative research

Activity Considerations



Multiple Answers



Multiple Answers

Activities

- Activities available at the destination are a criteria for 31% of respondents. 26% of respondents are specifically concerned about family-friendly places and activities which confirms the influence of females and children indirectly in the decision process.
- Activities are chosen after the destination however in some instances dictate the choice of destination itself as it is the case for Hajj / Umrah, Visiting Family & Friends, Business trips, Health & Medical trips
- Interest in activities are mainly to discover a destination such as sightseeing (54%) trying different food (45%), excursions & cruises (37%). Shopping is the 2nd most popular activity (48%) of respondents, while relaxation and pampering is mentioned by 40% of respondents
- Some travellers prefer booking activities as part of packages to manage budget more carefully and are delighted to find a tour guide who can speak Arabic for instance

I | O

“We want so much more from our holidays.

Activities that will excite our families are essential
for making memories when we travel”

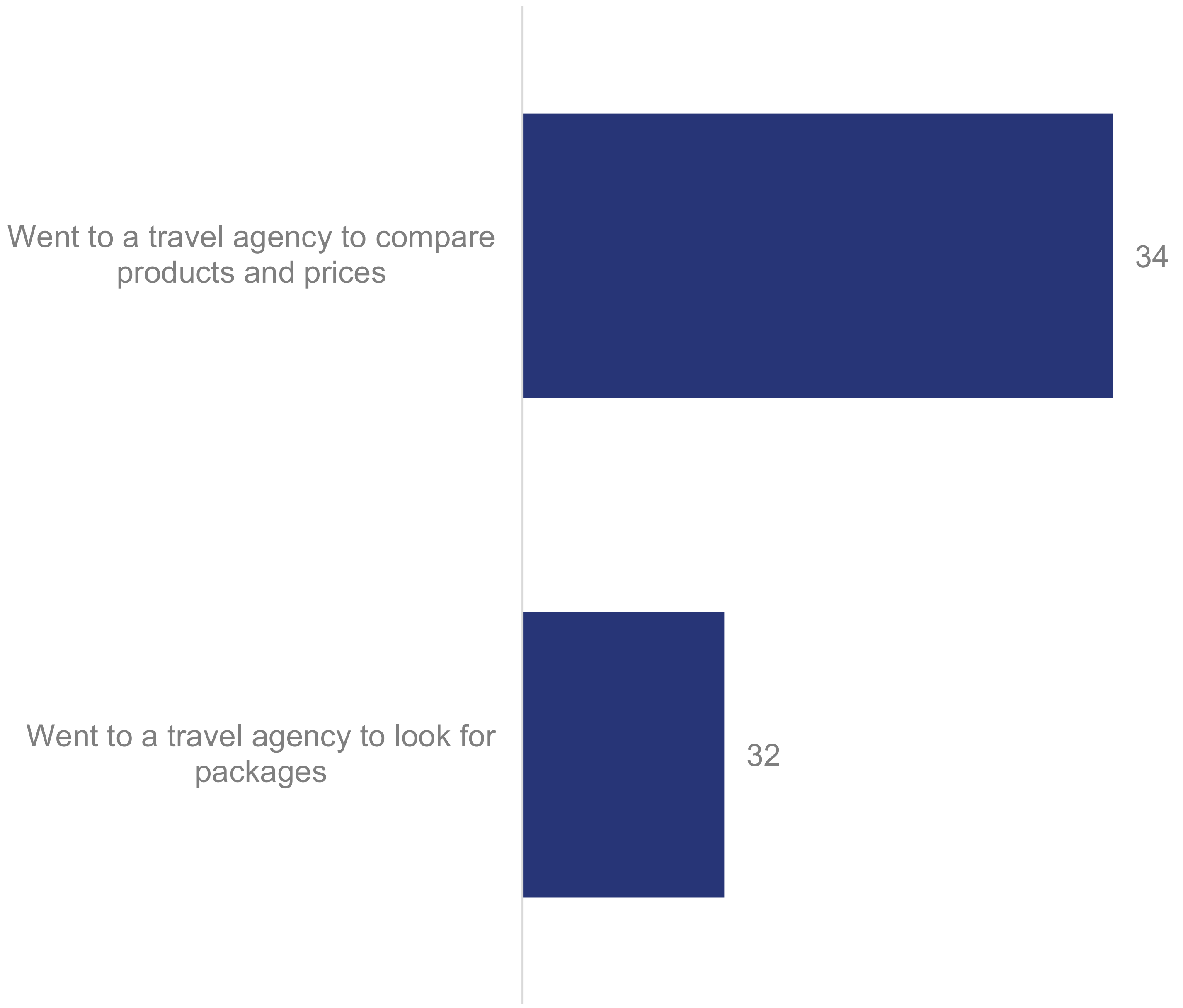
Food Options

- Only 28% of the overall sample mentioned that the availability of Halal, Vegetarian or Vegan food was a criteria for them
- This was confirmed during trade interviews & focus groups
- Considered as a “nice to have” only, overall the pleasure of discovering new destinations is a more important factor in evaluation of the destination

> “I will enjoy myself even if I eat biscuits”
>
> Saudi Ladies –
>
> Focus group respondent

Price Comparison

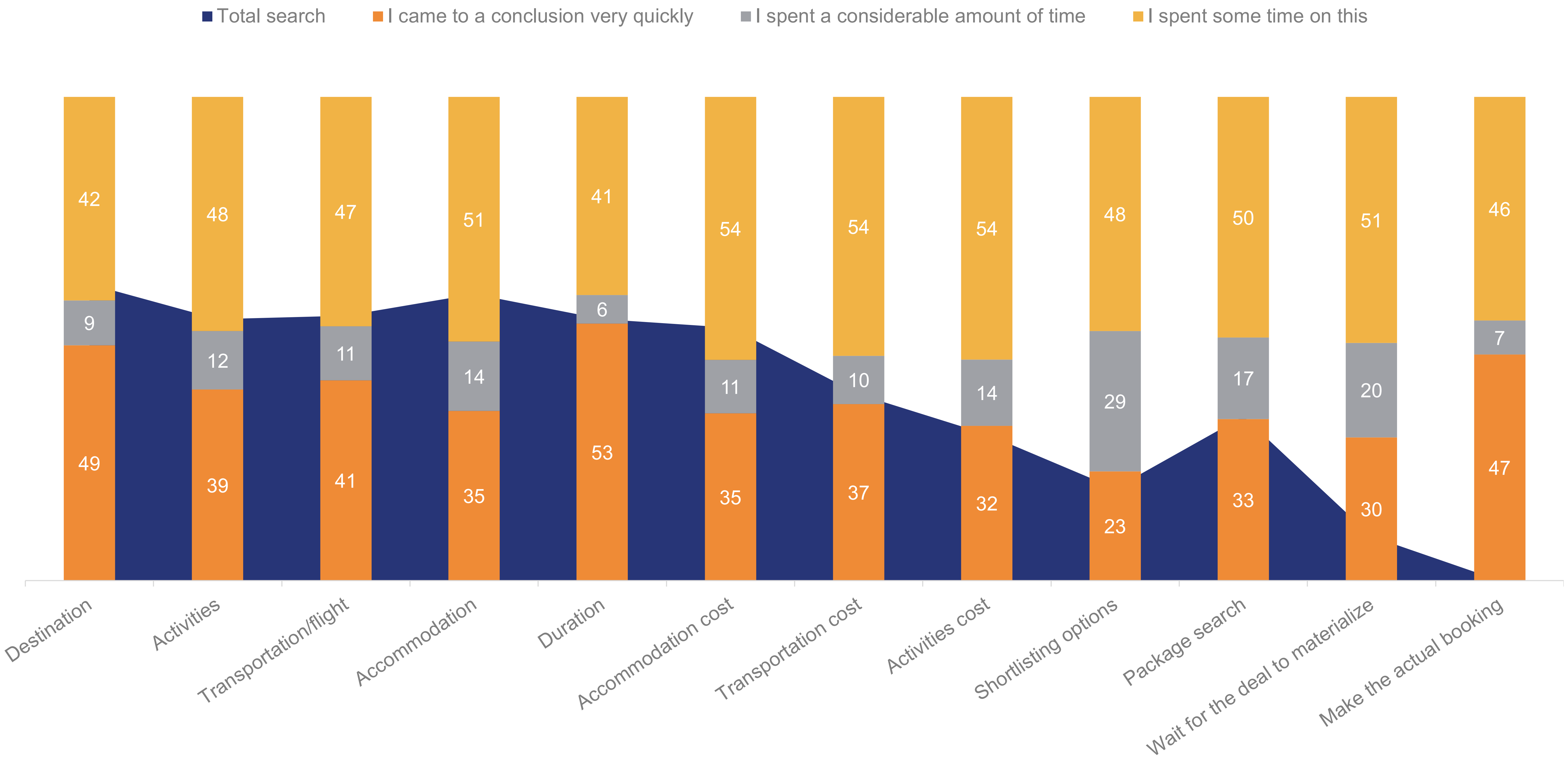
Online search	Offline search



Price Comparison

- Price comparison is a key component of the traveller’s evaluation process
- Comparison can be conducted by the same individual online or offline and independently of the final booking method. Travel trade interviews confirmed that quite regularly shoppers evaluate a given price at the retail branch of the travel agent with an OTA on their Mobile, and potentially customize a package accordingly
- Online trusted sites are used to compare other providers i.e.: Booking.com, Flyin, Mosafer, Tajawal, Skyscanner, or brand.com are the ones used by travellers (based on travel trade interviews and focus group discussions)
- Online, 33% of respondents search for discounts, 45% compared flights online and 44% compared hotel prices
- Packages are compared offline / online: 34% of the respondents visited a travel agency to compare product and prices

Search Cycle vs. Time Spent



Search Cycle vs. Effort

- Searching for the best value / cost takes a significant amount of time and effort for travellers
- The amount of choice and options online / offline can be overwhelming. 29% spent a considerable time shortlisting options, 48% spent some time
- Searching or waiting for a package or an attractive deal to materialize appeared time consuming (respectively 17% and 20% of the respondents spent a considerable amount of time on these)
- Searching for accommodation, activities and related costs are the key components of the evaluations and represent a large part of the effort
- Travellers are prepared to put in time and efforts to secure the best value and destination

INSIGHT | OUT

Booking & Experience

Reconsideration vs. Commitment

Search vs. Booking

Actual Booking

Choosing Packages

Packages Components

Packages & Related Components

Journey Duration

Post Booking

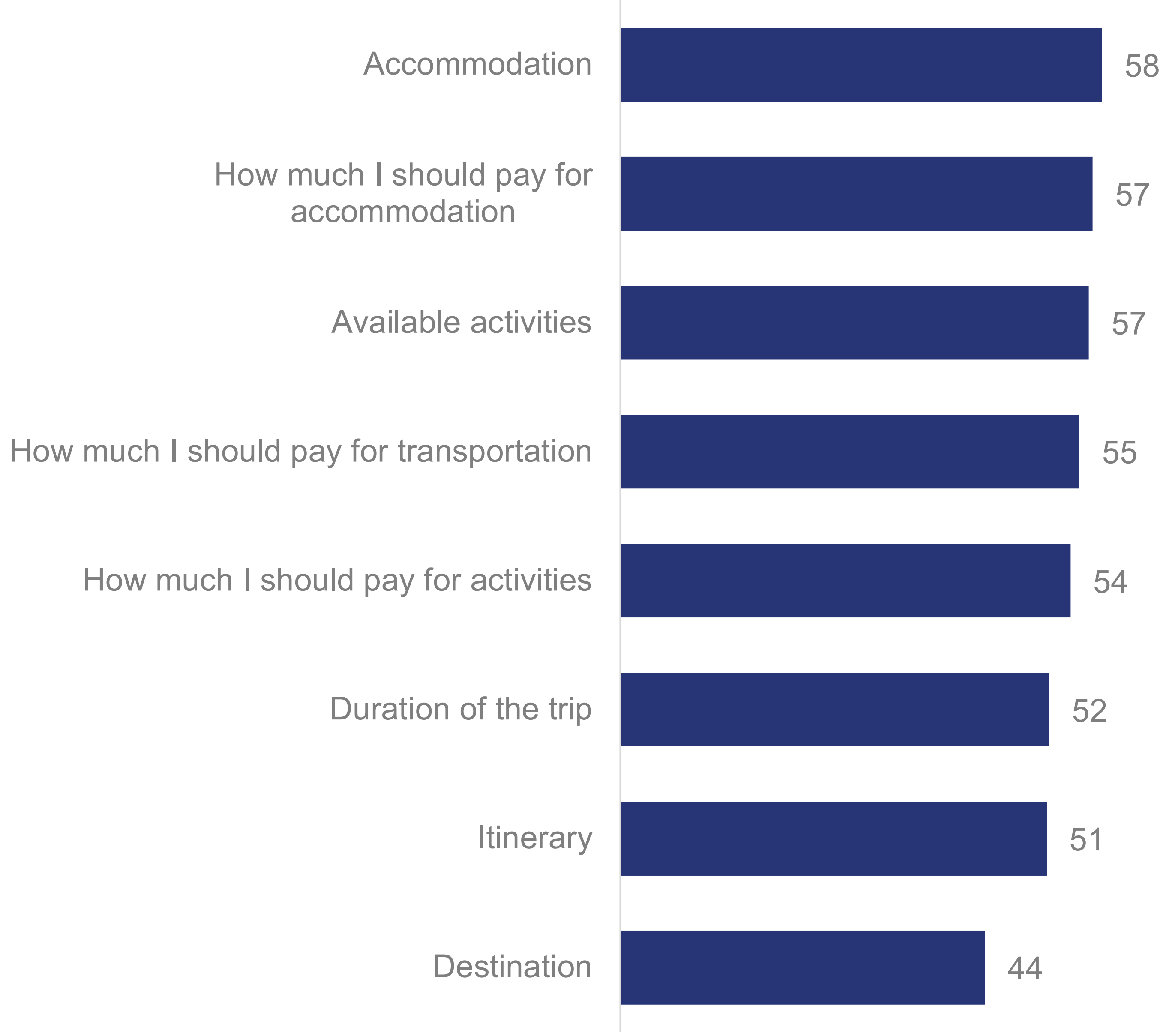
Journey Gaps

Experience & Sharing

Reconsideration vs. Commitment

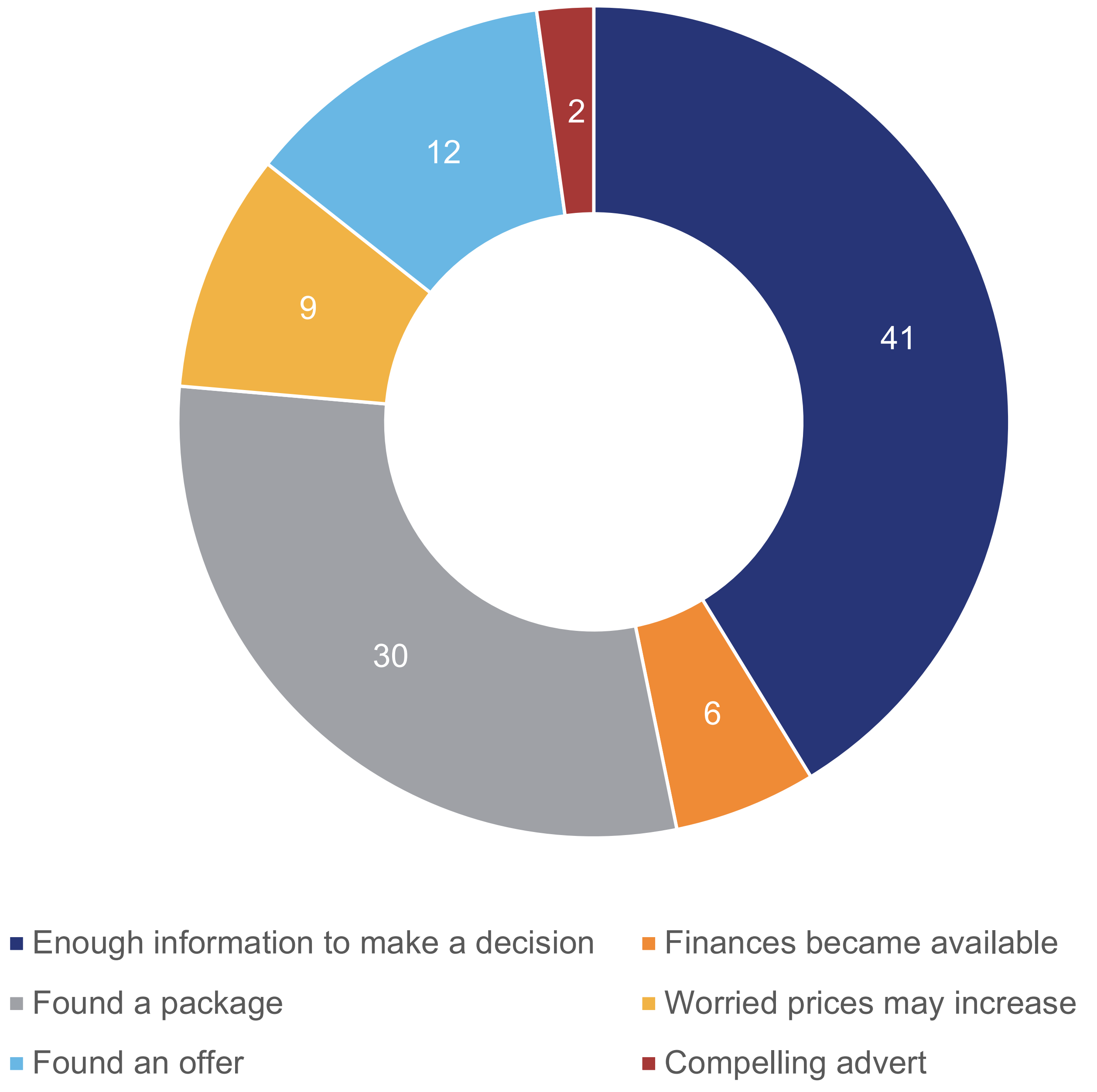
Change of mind

(during the process of search)



Multiple Answers

Trigger for making the booking



Reconsideration vs. Commitment

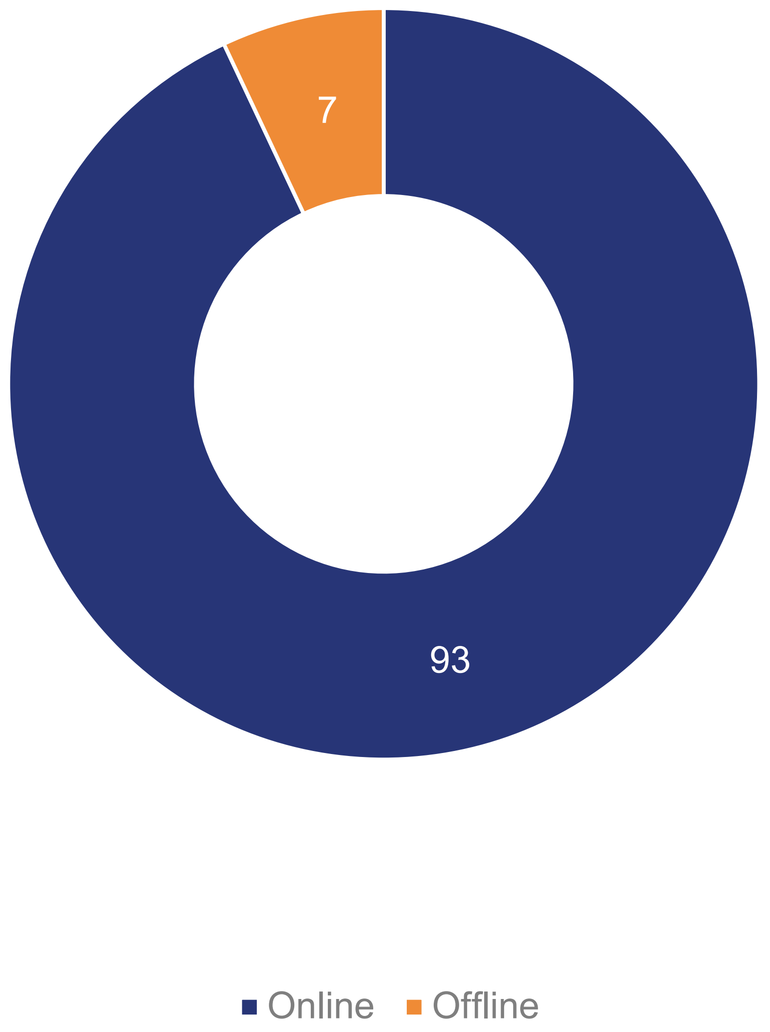
- Hesitations are quite normal during an emotional journey that is organizing and booking a trip
- Selecting accommodation is seen as one of the most complex parts of the journey: there are many choices and considerations, and the impact of choosing the wrong one can impact the stay / trip
- It explains why 58% of respondents changed their choice of accommodation during the process, or 57% changed the budget allocated for accommodation during the process – many opting for a better accommodation with an increased cost
- A similar approach for activities: 57% changed planned activities during the process, 54% changed the budget allocated to activities during the process

‘Sometimes I find a cheaper hotel online after I have made our booking. I will then ask our travel agent to make the changes and If they cannot, I simply end up booking online ’

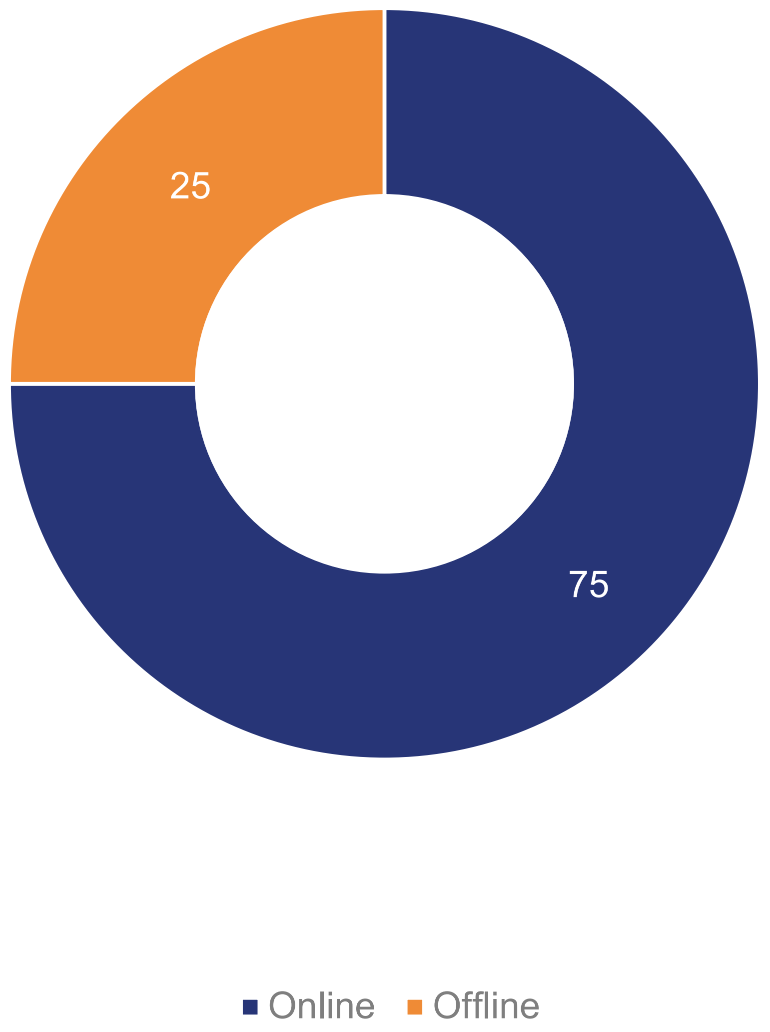
UAE Nationals
Focus Group Respondent

Leisure Travel… How?

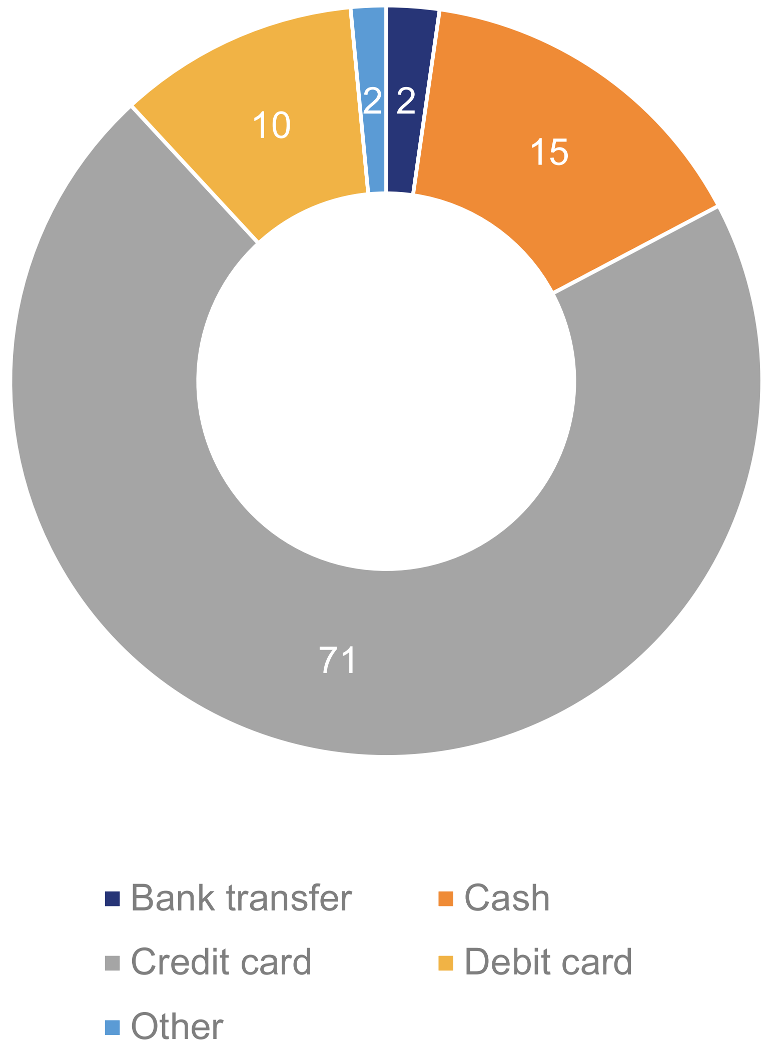
Search



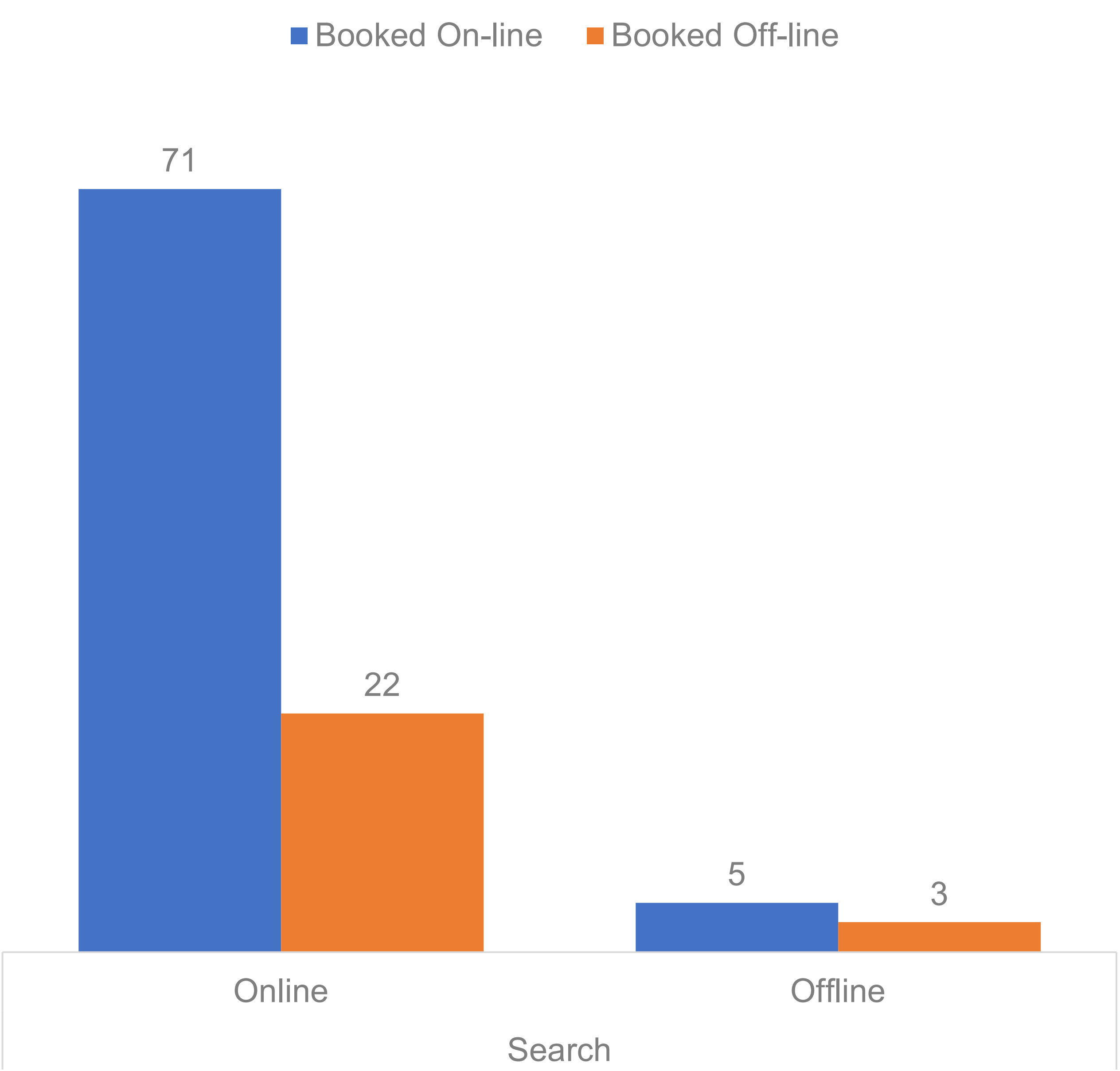
Book



Pay



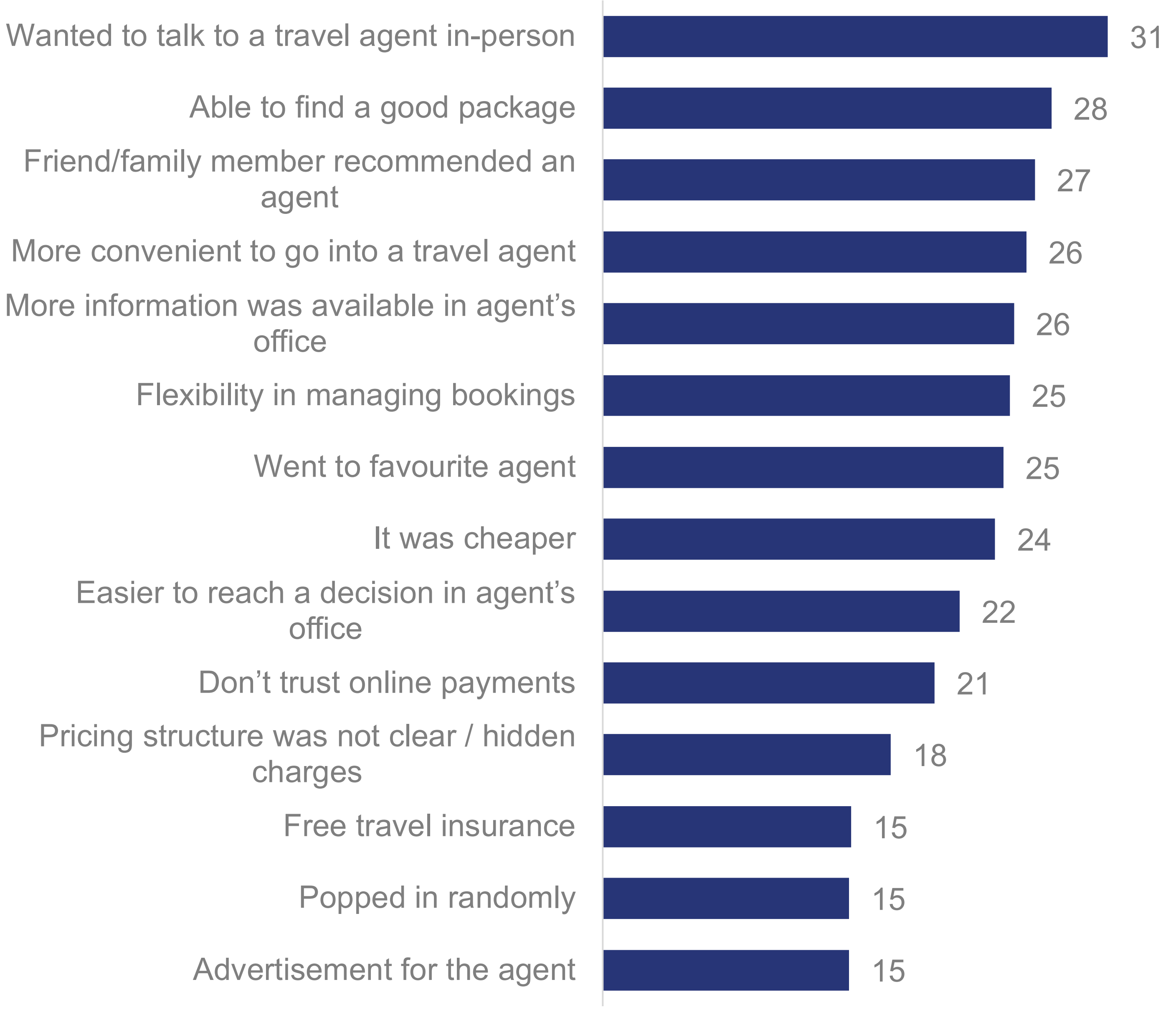
Search & Booking – Online vs. Offline



- 31% of respondents who had searched online booked offline as they preferred a face to face interaction. Trade executives interviewed are conscious of this and many are providing customers with instant and direct communication; toll free Live Chat, Social media live stream, to assist the process and re-connect with the traveller
- 28% of respondents who had searched online eventually booked offline as they found a package matching their needs. Packages are seen as a great opportunity to manage budgets however require customization which does not appear to be easy online
- 27% of the respondents who had searched online eventually booked offline following a recommendation most likely from FF&C showing once more the importance of word of mouth and peer recommendation in the region
- For the few who had searched offline and decided to book online, it appears that 100% sited better value and 90% that it was more convenient as reasons

Search vs. Booking

Searched online but booked offline

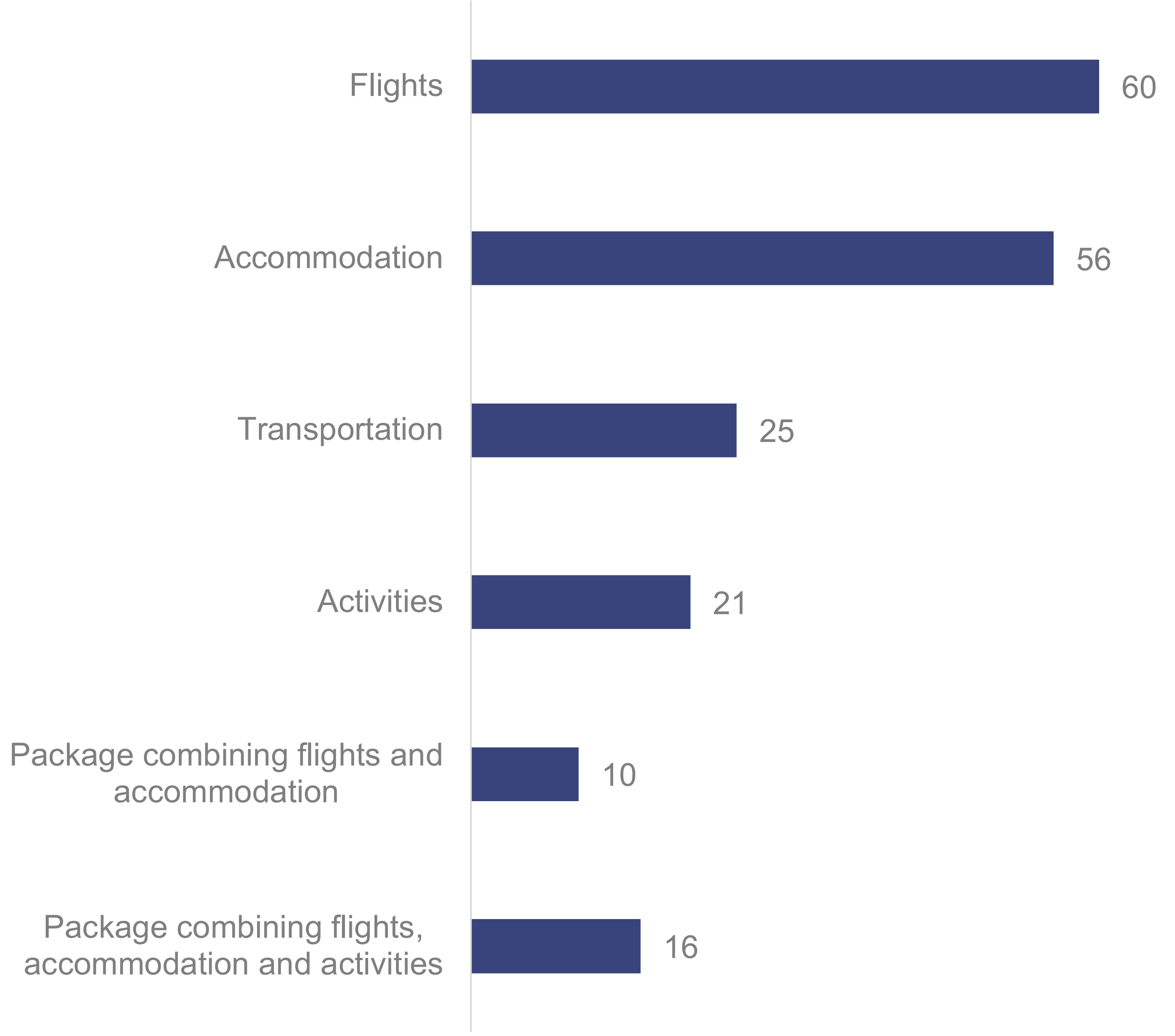


Searched offline but booked online

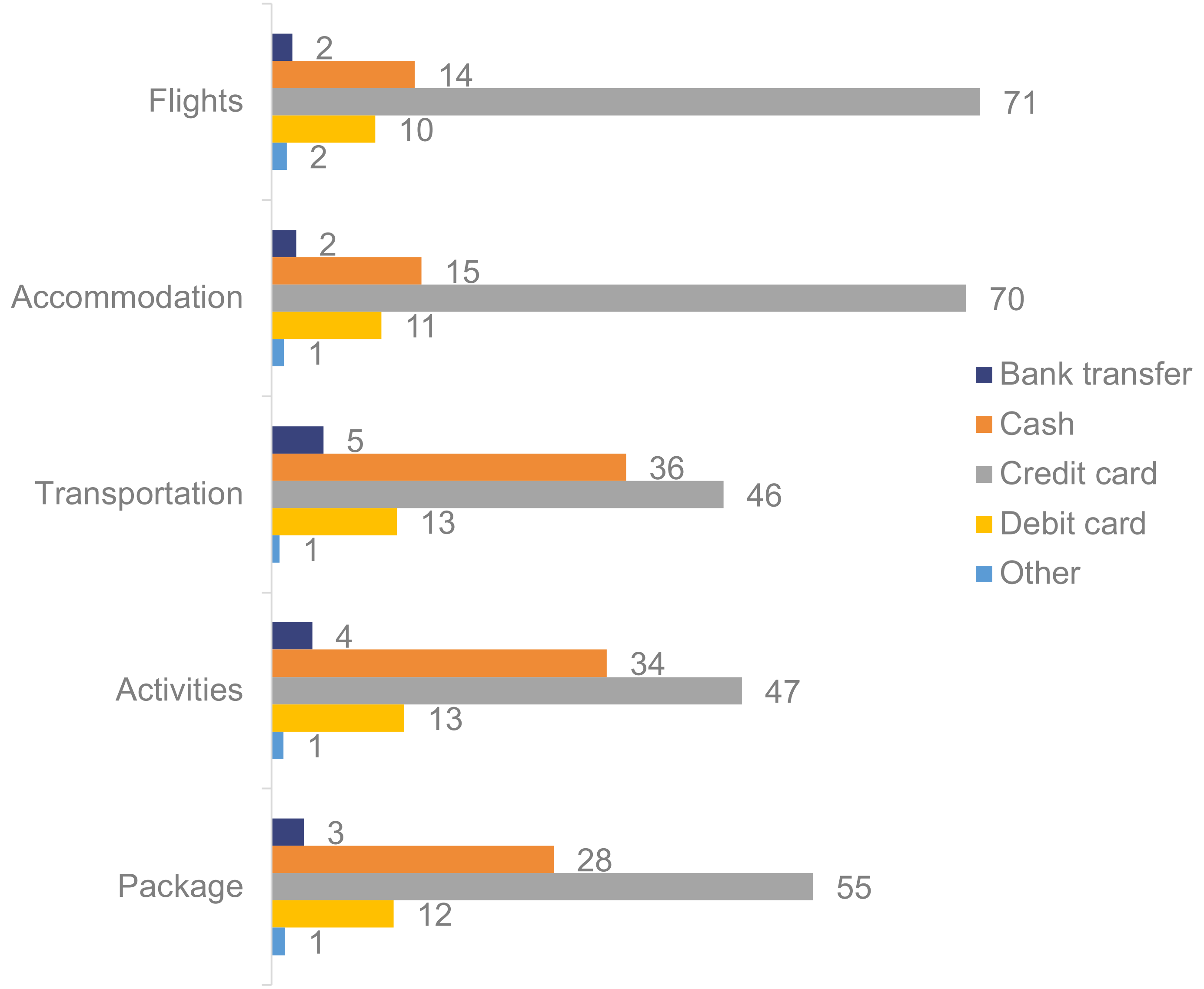
Small base

Actual Booking

Component booked



Payment method



Actual Booking

- Packages are still quite limited in the region with only 16% of respondents booking multiple components
- Packages consist of pre-determined packages or dynamic packages sold online which enables the traveler to select various components
- Only 25% of respondents booked transportation and 21% of respondents booked activities as these two components are generally booked once in the destination. Depends on many factors including cost-savings, seeing choices in resort etc
- Payment for all segments is mostly by credit card (71% for flights and 70% for accommodation) although the share for on destination components is reduced since 36% of the transportation and 34% of the activities are actually paid in cash
- The success of Booking.com reflects the preference for accommodation payments at the hotel vs. online. Credit cards are used as a guarantee only online
- Successful tour operators or agents with retail branches have installed ATM’s on their premises

I | O

“Marketing needs to be mobile if you want our attention.

To hold our attention, don’t just be present. Uncover our style and adapt!”

10

Packages

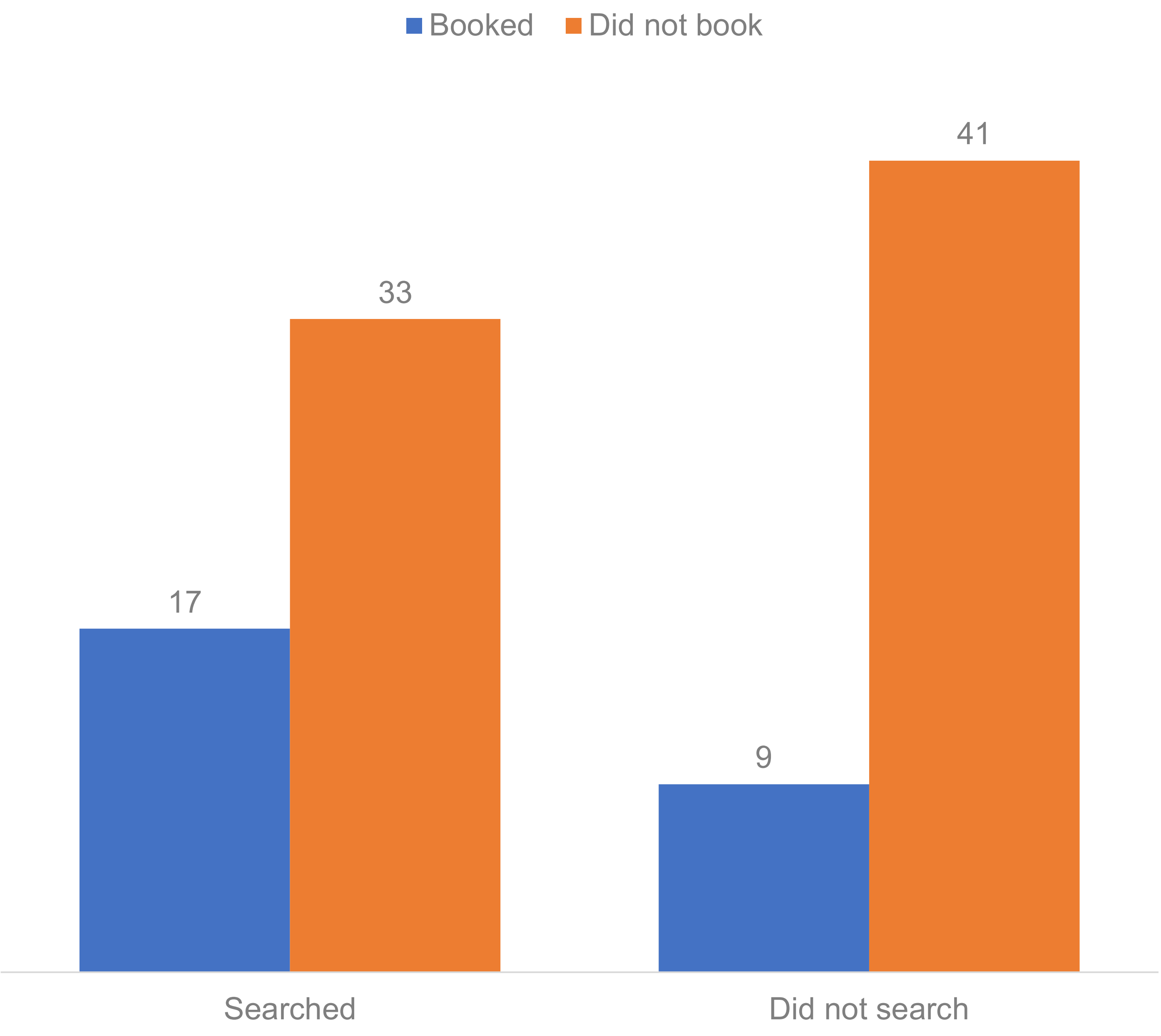
Package Serach vs. Booking

Choosing Packages

Package Component

Package Search vs. Booking

- Packages market opportunity in the region is 74% and what prompts booking is total price
- Whilst they do search only 17% end up booking
- Packages are chosen for cost reasons (48% of respondents), convenience (43%) and inspirational elements (42%)
- With regards to pricing, packages aren't just perceived as better value but a better way to manage budgets especially for families
- Those who didn't opt for a package could not find one suiting their needs: 43% thought it was not convenient and 46% were not interested in some of the package components



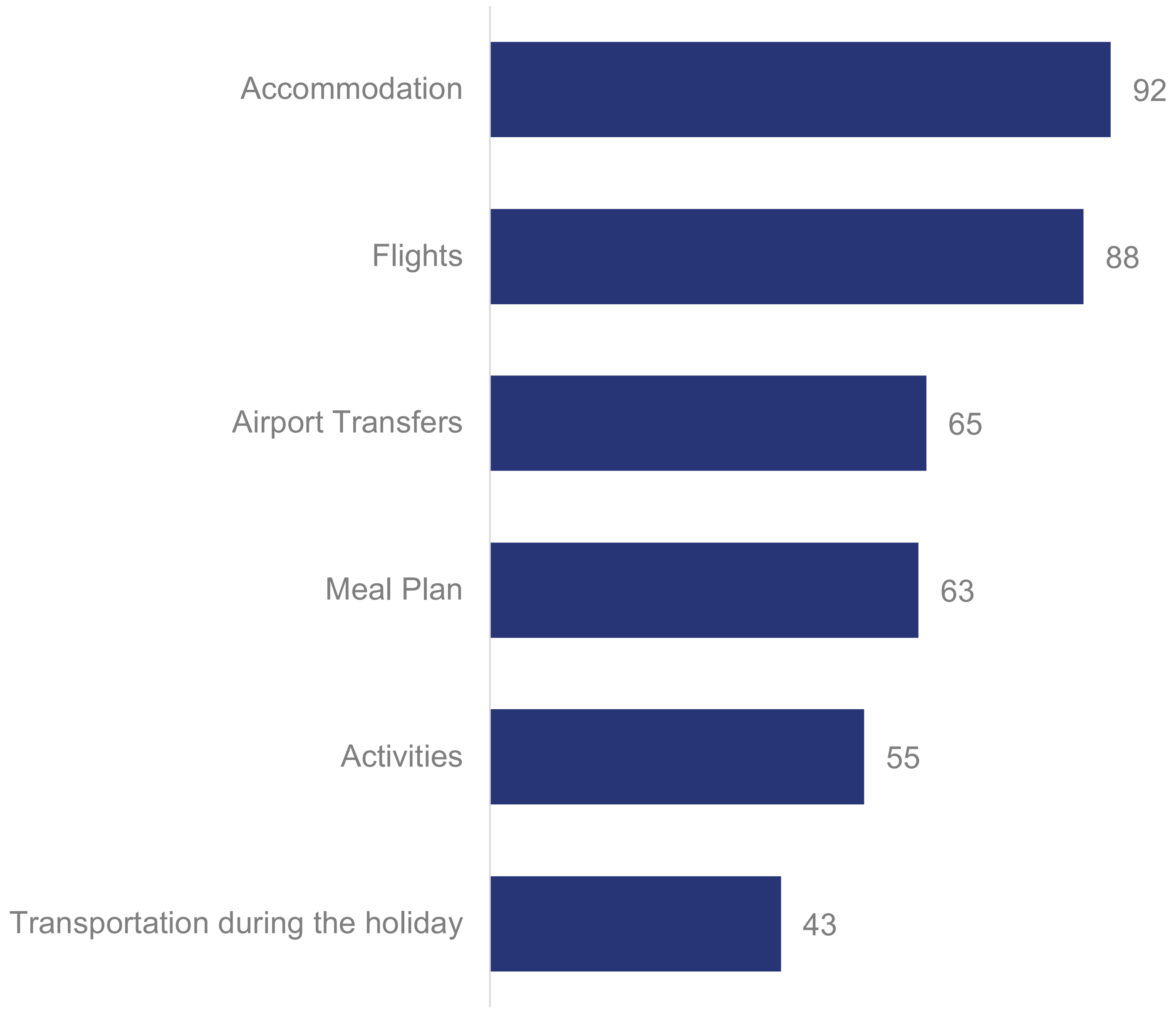
Choosing Packages

… to Package

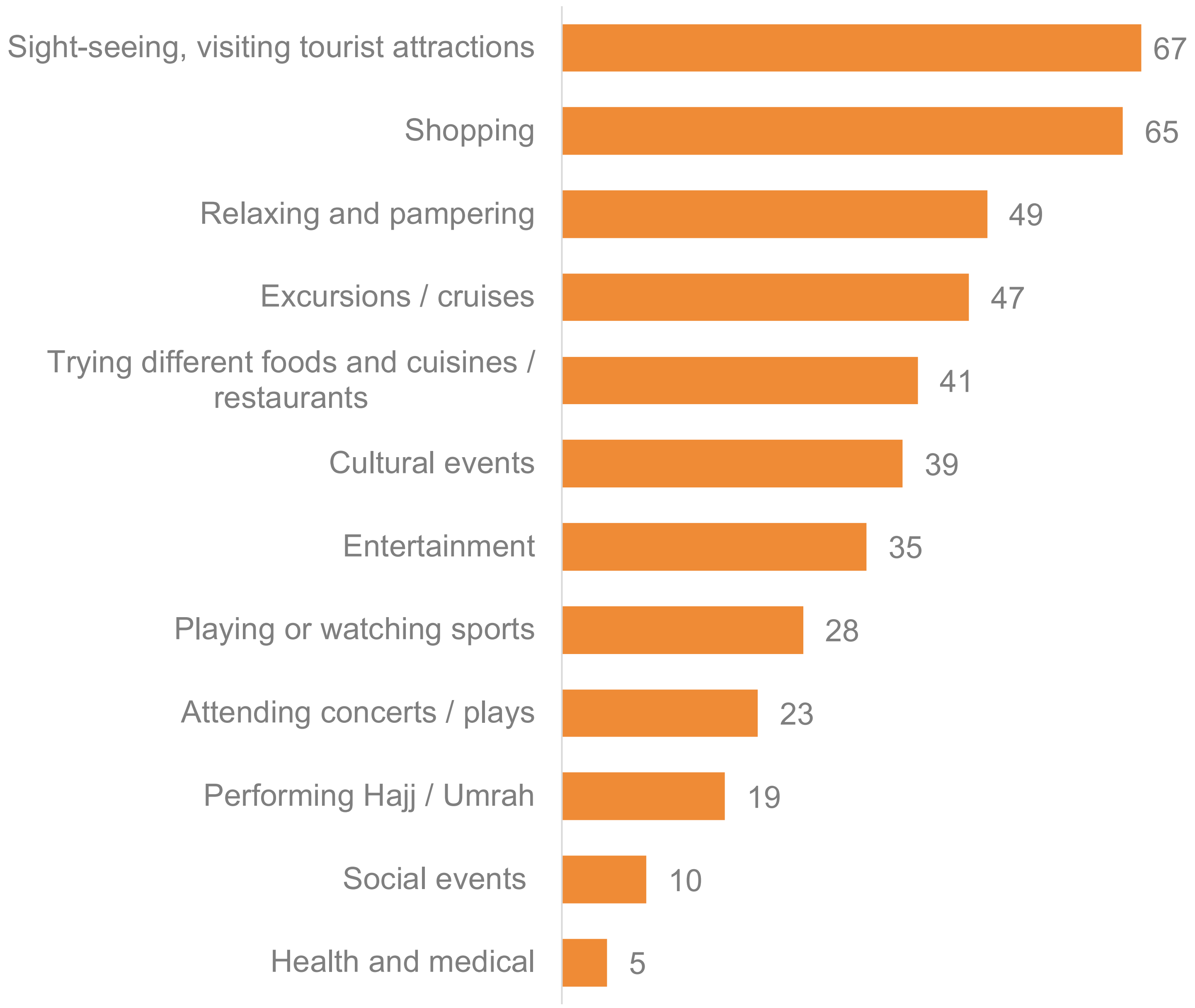
… not to Package

Package Components

Components



Activities



Packages

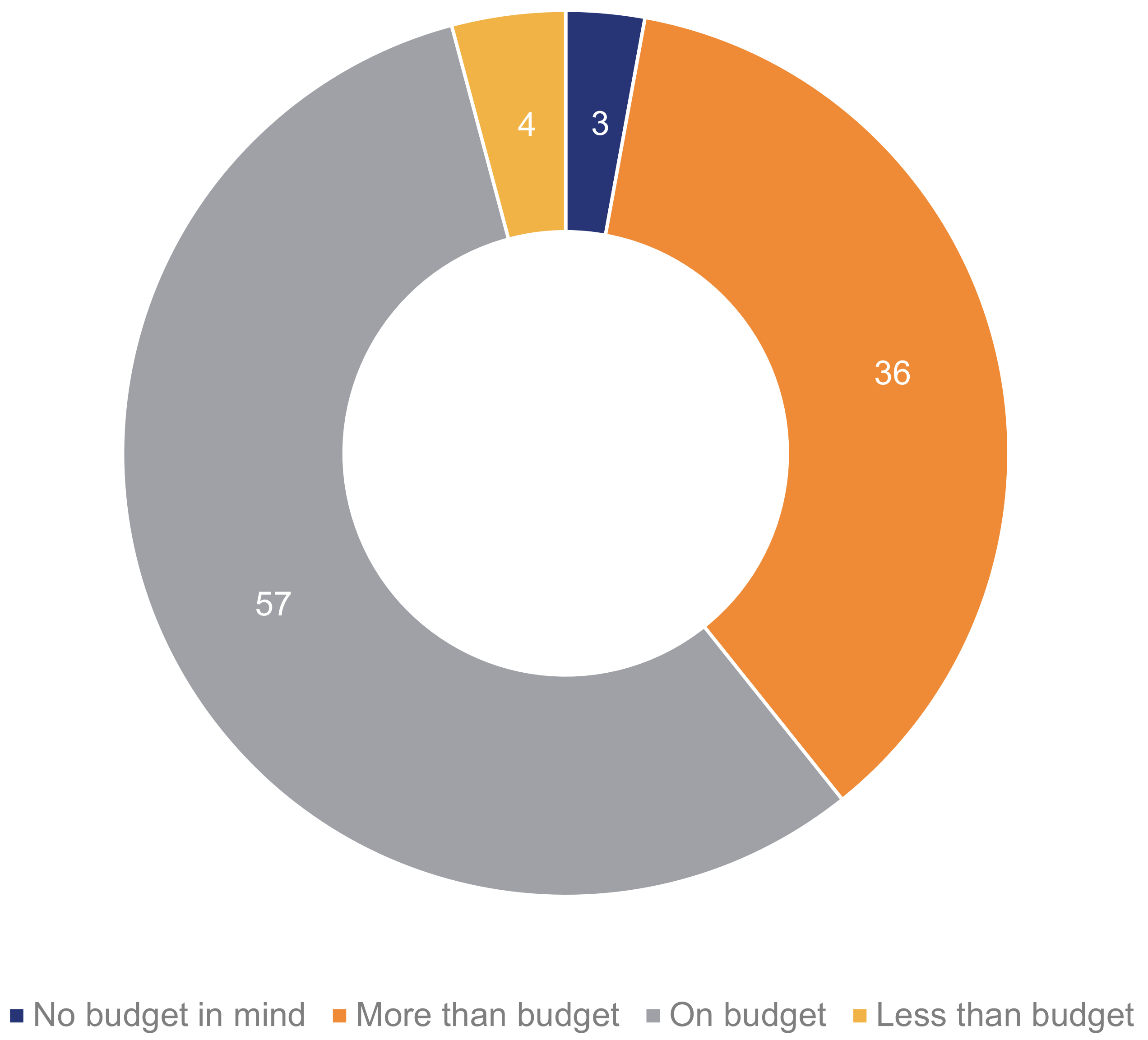
- Packages are mainly advertised online or in catalogues as a source of inspiration. Holiday makers will then be offered an opportunity to customize the package during face to face interactions or during remote / online interactions (call center prompted at the early stage of the online search)
- Above a 4-day trip, customization is generally required (itinerary, number of nights, activities or accommodation). Preset packages are suitable for short / last minute trips, they tend to be chosen from a cost and convenience perspective (Central Asia, Balkans). They are not always suitable for small groups / multi-families
- Packages can include multiple cities and can have a very complex itinerary. Packages remove the complexity and are easy to book for the traveler discovering the destination for the first time (safaris, tours in Europe with cultural guided visits, Australia, Iceland etc). In these instances, the package is chosen to compensate for the lack of expertise of the traveler
- Other Packages can be a single destination however conveniently taking care of flights, airport transfers, accommodation full / half board as is the case for many Indian Ocean resort stays
- To perform Hajj or Umrah non-GCC national travellers must book a package, while GCC nationals book via packages purely for the convenience

I | O

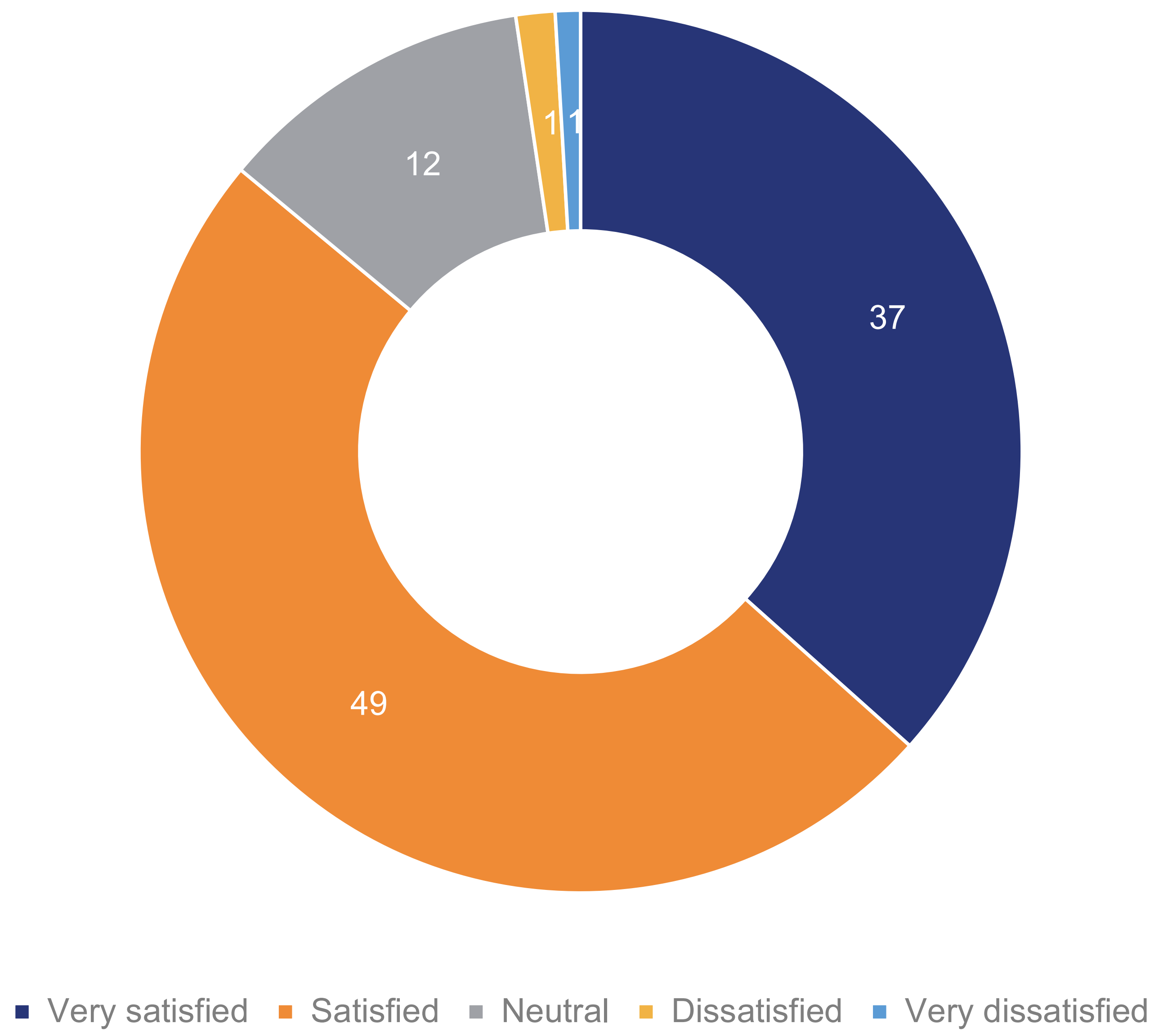
“We understand the value of packages and want the freedom to customize them to suit our individual needs and requirements"

Post-Booking

Amount Spent



General Satisfaction

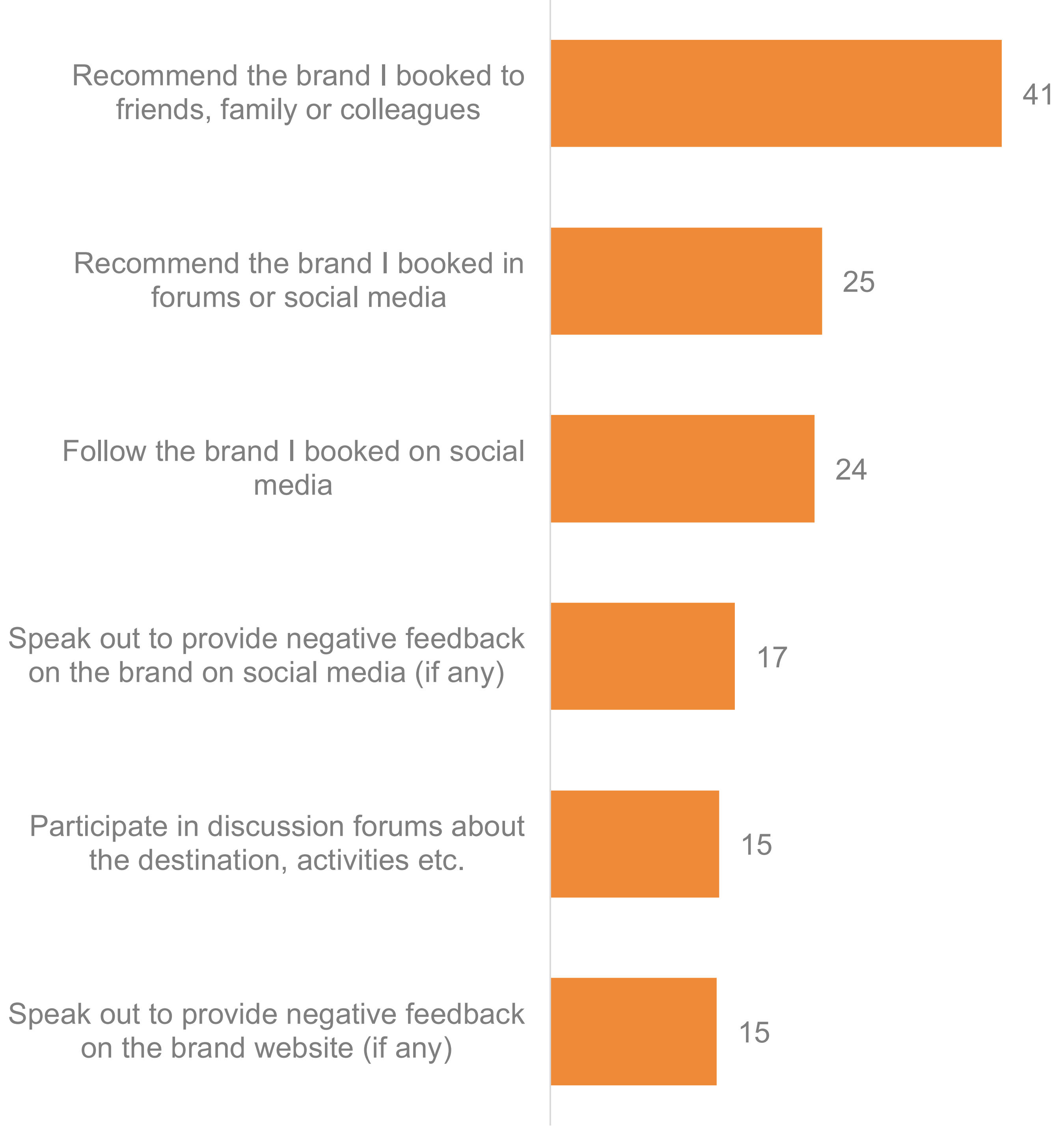


Journey Gaps

- As seen in the post booking feedback charts, 49% of respondents were satisfied and 37% very satisfied with the trip booked
- 57% had stayed within their budget and 36% had exceeded their budget
- Hesitation and uncertainty generally occur at the early stages of the journey caused by a number of factors; Lack of trust in the content (online), an overwhelming amount of choice and options and lack of transparency in the provided information (hotel description)
- A lack of trust turns into hesitation before booking with pre-payment or on non-refundable offers
- Travel experts are trying to assist travellers with support desks, call centres, live chats etc. Most of the interactions are in Arabic based on feedback provided.
- Fundamentally “online” with human presence and physical contact will always be the preferred option. The second preference would be “online” with human presence / interaction (live chats etc) or lastly “online” only

Experiences & Feedback

- 41% confirm sharing feedback post-trip with their Friends, Family and Colleagues, repeating the cycle
- Only 25% recommend a brand booked/enjoyed on social media, while 17% will share negative feedback on social media
- In the event of a negative experience, 15% will speak out on the brand website of the supplier



INSIGHT | OUT

Business Travel

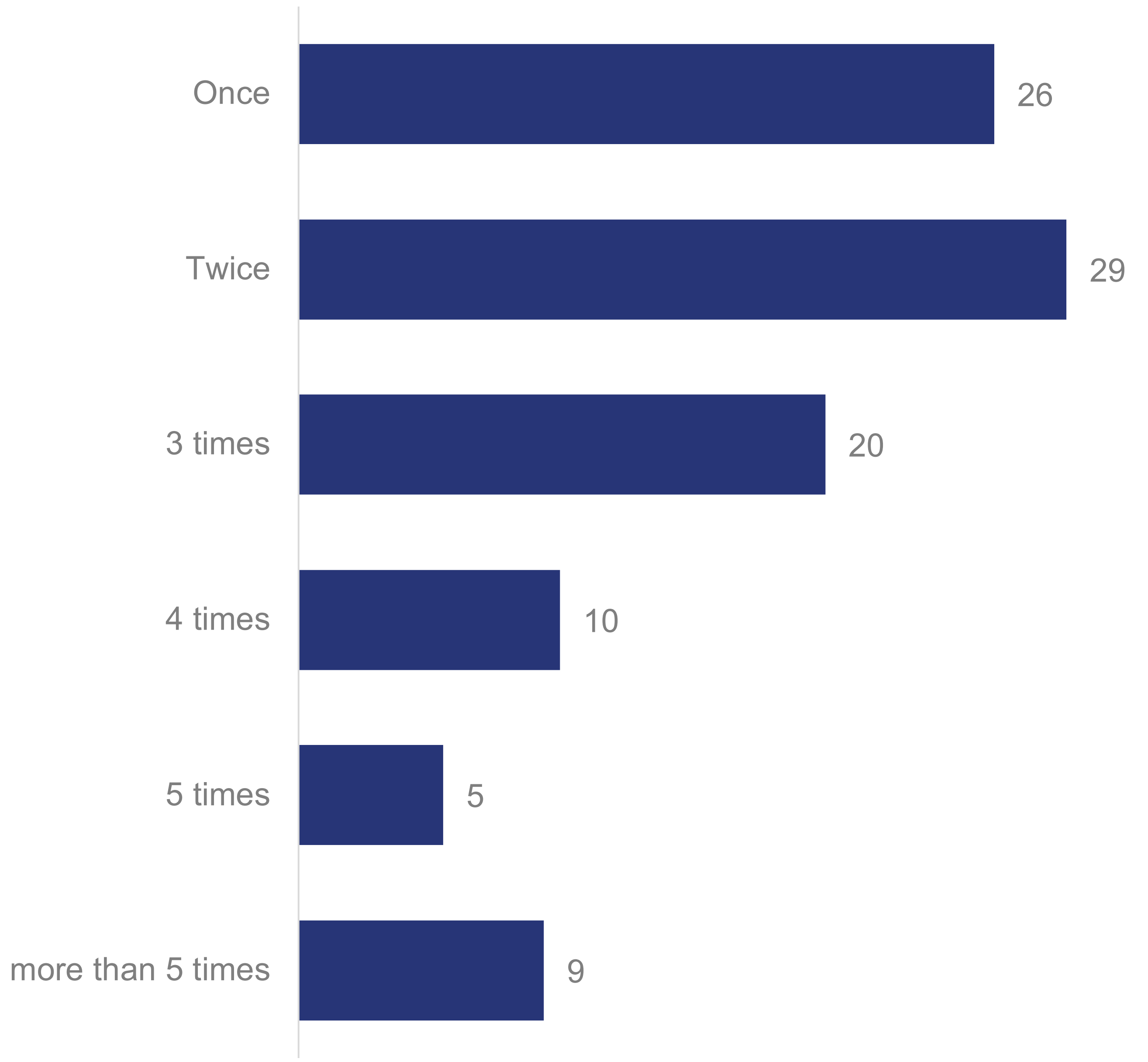
Who?

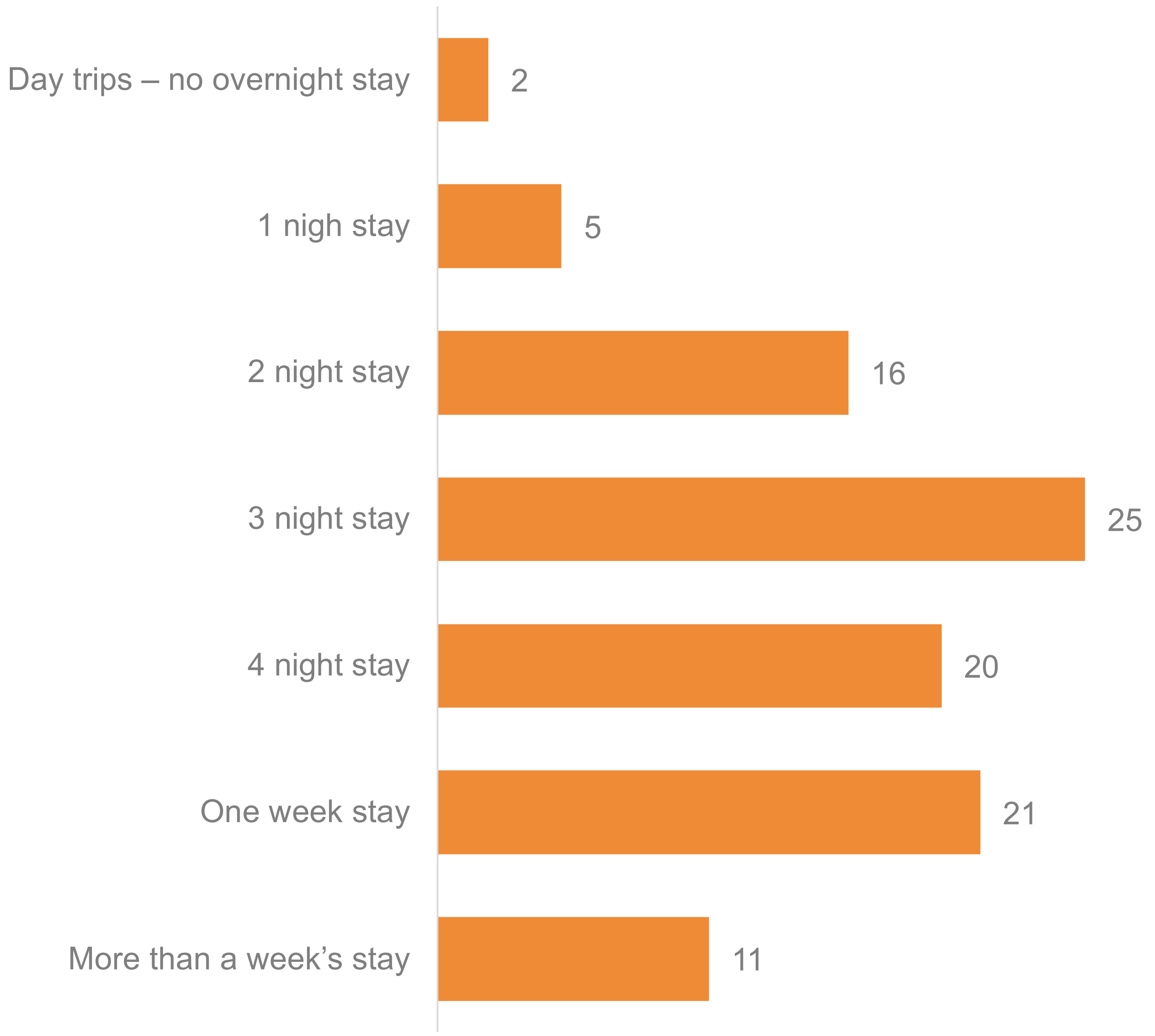
How?

Booking?

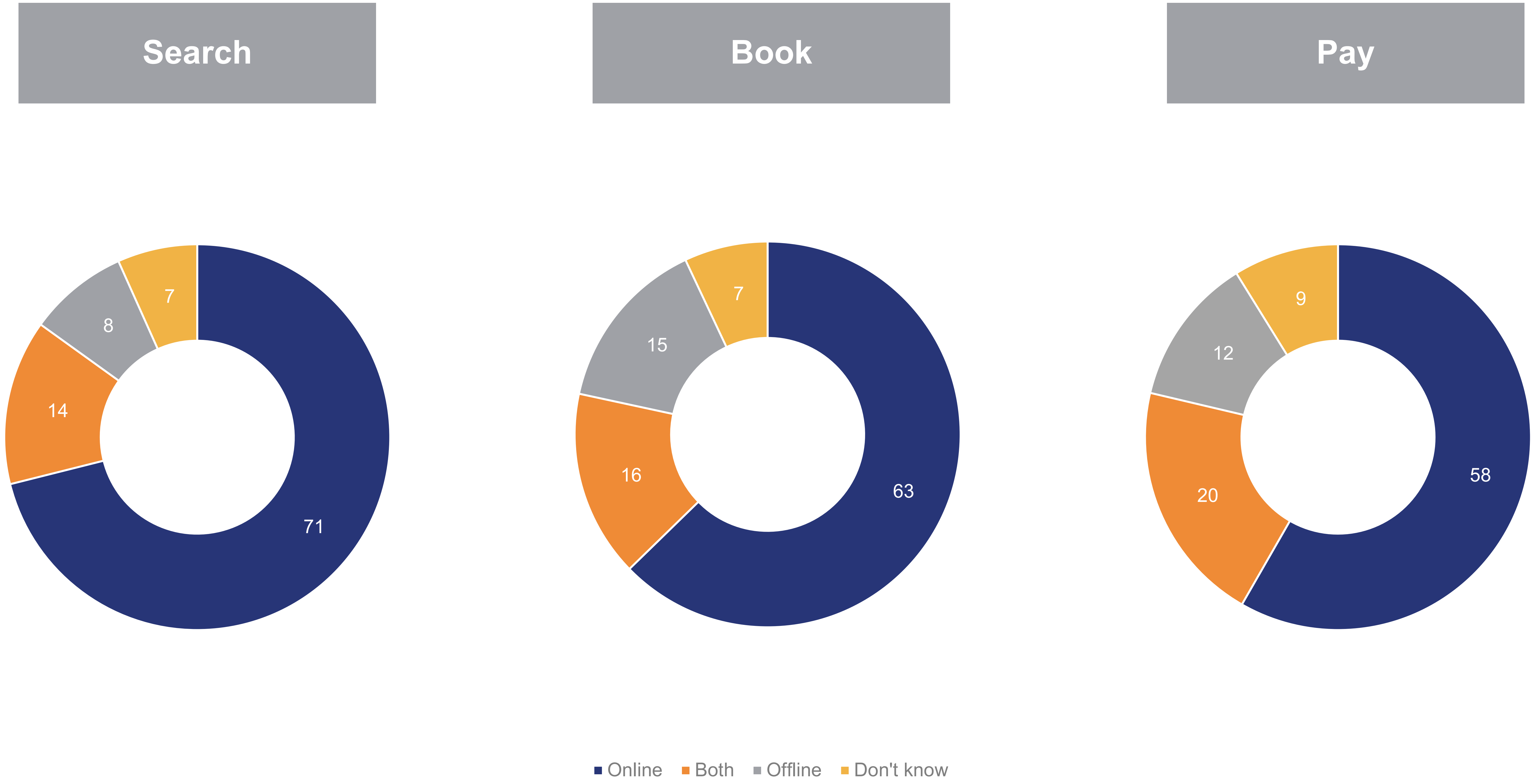
Business Travel

Frequency	Duration

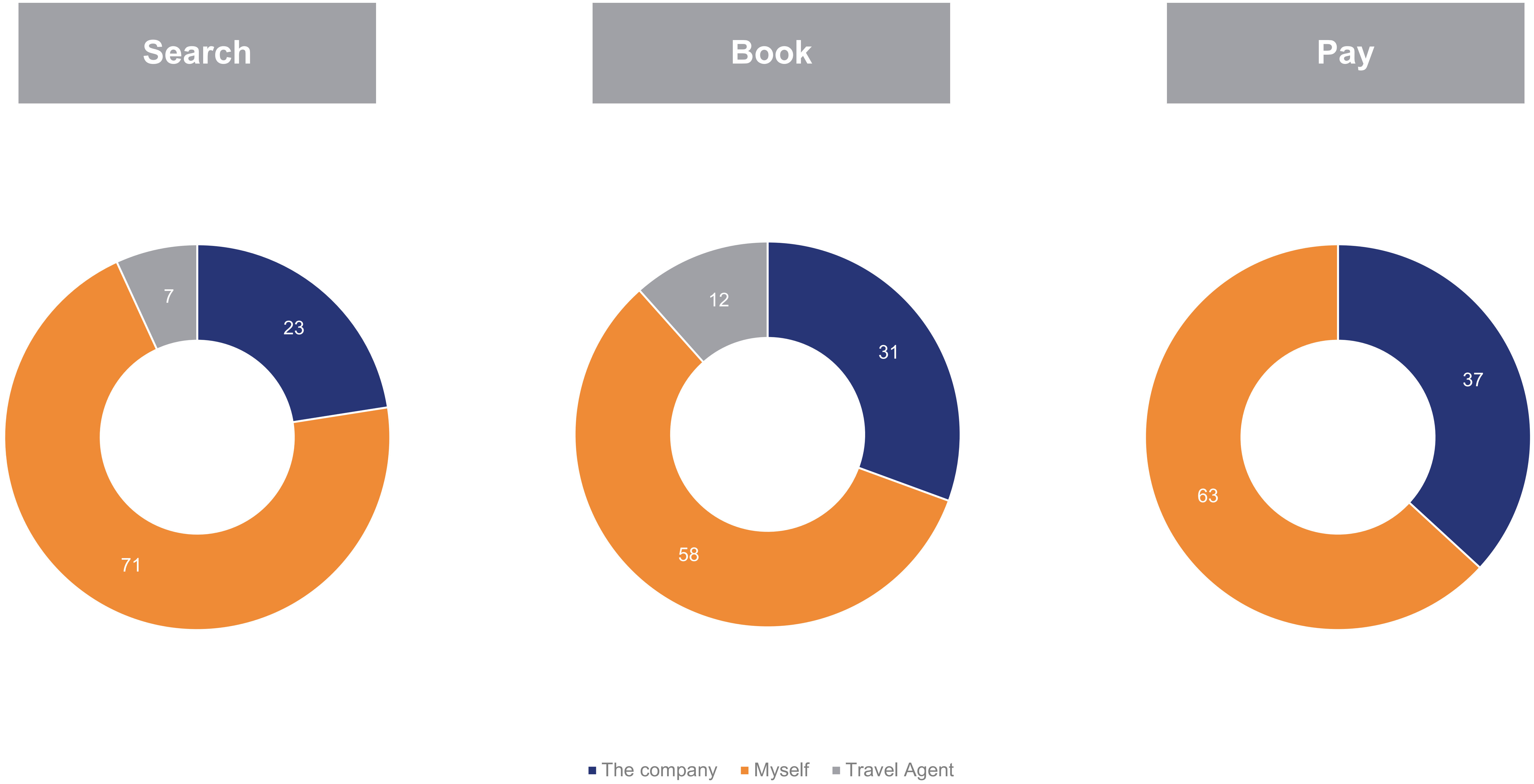




Business Travel… How?



Business Travel… How?



Business Travel

- 55% of respondents travelled for business less than 3 times in the last 12 months
- Business travelers report that they search, book and pay online themselves for business trips. Interviews conducted with TMCs confirm these statistics, since most of the Middle East based companies have a limited travel policy (generally limited to restrictions based on hierarchy or cabin type per duration of a trip). Very few have corporate rates with airlines and therefore business executives book based on price
- TMCs contracted by companies provide self-booking tools allowing them to check rates and book their B-Leisure extensions easily
- Low cost carriers are more and more successful with business trips since the focus is on timings and cost. Most of the trips being intra-regional, LCCs might often appear as the most convenient choice
- For hotels, location is ranked as the 1st most important criteria followed by price. Sometimes, a star rating is defined in the company's travel policy

Business Travel Duration

- 45% were 3 to 4 night stays and only 2% reported a day trip without an over night stay. Companies are trying to control travel costs and tend to replace business travel when feasible with teleconferencing
- The duration of the journey varies depending on the type of trip, number of participants, destination, nationality and season
- The longer the trip and the more people involved, the greater lead time is required, also impacted by visa requirements (Indian Subcontinent expats -planning 3 months in advance)
- GCC – Arab expats would plan between 1 and 4 months prior to departure for long trip / hauls and 1 week ahead for short ones. For long trips / hauls, from search to booking, an average of 2 to 3 weeks is standard
- Interviews and focus group discussions highlighted the increasing though difficult to measure impact of “B-Leisure”. Depending on destination visited, seasonality and duration, some travellers extend business trips and sometimes bring a spouse and children along for an additional few days

INSIGHT OUT

Marketing Personas

We all reside in the region, but our needs are very different. Meet us …

Ahmed (GCC National)

Nasser (GCC National)

Priya (GCC Indian Subcontinent Expat)

Matt (GCC Western/Others Expat)

Reem (GCC Arab Expat)

Michael (GCC Western/Others Expat)

Rania (Egypt)

Wassim (Levant)

Ahmad

- Ahmad is a 28 year- old Saudi national living in Riyadh. Married with 2 children (3 years and 1 years old), he is a full- time employee
- He travels 2 times each year for leisure mostly with his family however he might also travel for a weekend with his friends in the region
- He likes to travel and likes discovering new destinations
- His wife takes care of arranging the family trip and she is preparing a trip to Japan for the cherry blossom season -they heard a lot about it from friends who went last year
- Two weeks ago, Ahmed went to Dubai with a couple of friends to unwind. He was in charge of the trip planning. He knows what he wants and had it all sorted in few days: Flynas tickets booked online and the 4-star hotel booked on Booking.com in the Marina
- Not much else had to be planned, once there they enjoyed good restaurants, tried the new zip-line and shared some fun shots with friends back home

Nasser

- Nasser is a 35 year-old Emirati from Dubai, educated in UK. He is self- employed and married with one 4 year old child
- He travels 3 times each year with his family. He likes to travel to discover the world and spoil his family
- Last summer, they went to Paris and Tuscany
- Based on the suggestions of his wife, they arranged a package with Emirates Holidays. Flights, accommodation, tickets to Disneyland and a 4 day tour in Tuscany
- It was convenient and easy to book with Emirates Holidays since the trip involved many logistics and not speaking Italian would have been a challenge, although they knew pretty much what they wanted
- In Paris, they enjoyed some shopping and Disneyland. In Italy, they loved site-seeing and the great food
- Upon their return, they recommended Italy to Nasser’s brother and he might go this summer with a group of relatives

Priya

- Priya is a 32 year- old Indian expat living in Muscat since she was a teen. She is now married with 2 children (15 & 13) and a full-time home maker
- She travels with her husband and children once a year
- She is planning for a 10 day tour in Europe this summer. Children are now of an age to visit these places
- Priya and her husband decided together though she did the search. She considers herself quite tech savvy and enjoys taking time to search for the best options for her family
- She shortlisted Paris (easier for the visas as per her friends experience), London, Amsterdam and Rome. She looked at MakeMyTrip options, compared a few hotels on Booking.com and Trivago, looked at things to do on TripAdvisor before shortlisting these capitals. She decided to wait for a couple of weeks to book as summer offers will certainly be published mid April. She will go ahead as she will need to apply for their Schengen visas
- Cautious of the budget, she is targeting 3 and 4-star hotels
- Hopefully, they will make memories to share with Family & Friends

Matt

- Matt is a 40 year-old South African expat living in Doha. He is married without children
- He travels 3 times each year including one business trip in the region
- One of the trips is dedicated to a visit home where he stays with relatives
- He also visits other destinations. Recently they decided to treat themselves and enjoyed a 3 night break in an Indian Ocean 5-star resort
- They decided on the Sunday, shopped together online, and booked a Qatar Airways offer on the Monday with departure on the Wednesday evening
- Next trip could be in Thailand, a popular choice and people are friendly, it is relaxing, there is good food and it has a beautiful tropical climate
- They will start looking in few weeks when they decide when to take leave in the Summer since they can easily book flights and hotels online

Reem

- Reem is a newly married Jordanian expat living in Abu Dhabi, 27 years old, she works full-time
- She travels 3 times a year for leisure, most of the time in the region or Asia (easy and good value)
- She is the one to carry out the initial research and then decides with her husband based on the budget he has defined
- Traveling is an opportunity to treat herself and companion
- In general, she knows where she wants to go and does a speedy online search. She enlists advice from Travel Agencies before finalizing her shortlist. Agents are helpful as the choice online can be overwhelming
- For the next trip, she heard a lot about Georgia and looked at Holidayme, Emirates and Etihad Holidays. They are all well-known and safe choices and she will also certainly ask her friends who used Holidayme recently
- They normally stay in 4-star hotels but she is not too sure about the itinerary and quality of the hotels. She will do a hotel shortlist after choosing the agent and look at pictures and reviews on Booking.com and Mosafer.
- She will discuss it next week with her husband as they plan to go before Ramadan

Michael

- Michael is a 32 year-old Filipino living in Dubai with his wife and their 2 children (4 and 1 year old) since 10 years
- He is a full-time executive and travels 3 times a year including some staycations – sometimes with friends, a trip home with an extension to Asia
- He likes discovering the world and decided with his wife that this summer they will stop for 1 week in Hong Kong on their way to Manila.
- Discovering different destinations on route home is standard practice and they visit a new destination every year
- Prior to that, they will go for a relaxing weekend in a Ras Al Khaimah 4-star resort this coming Thursday
- He heard a radio ad and saw some Cobone newsletters also mentioning a new resort in Fujairah so may compare offers between the two destinations
- They are quite tech savvy and will research good deals on Booking.com tonight.

Rania

- Rania is Egyptian, living in Cairo. 28 years old, she is married with 2 children (6 and 4 years old) and a full-time employee
- She travels 4 times a year including a business trip (training) in the region. For leisure, she travels mostly with her family
- They drive to other Egyptian cities such as Alexandria for short breaks and last year, they flew to Athens and the Greek islands with her sisters family. They stayed at 4-star hotels she had found online
- Since she likes to explore options she is in charge of the search, however her husband manages the booking
- They wanted to book a package online but didn't really find what they needed as traveling with 9 people including 5 children is complex. They eventually booked with Misr Holidays and customized accommodation in hotels with family rooms. Additionally Misr helped them to book a guide for a day in Athens to visit landmarks, then they went shopping and followed recommendations of other travellers on site
- Upon return, Rania and her sister wrote reviews and shared their impressions with Family & Friends

Wassim

- Wassim is a 38 year- old Lebanese national and lives in Beirut with his wife and 2 children (12 and 9 years old)
- A full-time employee, he travels 3 times a year; once in the region and then to Europe or Americas
- This summer, Wassim is thinking of going back to Canada since Wassim's brother lives in Toronto. The family may spend a few days in the countryside and he leaves organization to his wife and sister-in-law to manage: she knows what kind of activities he and the children enjoy
- They generally stay in 4- and 5-star hotels as he likes traveling and it is always a great opportunity to spoil his family
- Once she shows him what she has found, he will most likely book online for the accommodation and rent a car once there
- Effectively, only the flight tickets will be booked in advance to secure the best offers which he is monitoring on Skyscanner

I | O

"Do you recognize us?

Do you understand our concerns? Motivations? Challenges?

What do our individual journey's look like?"

INSIGHT | OUT

Messaging / Marketing recommendations

Messaging / Marketing Recommendations

- The messaging will differ depending on demographic segment, season and stage of life which will influence the type of trip and type of booking (package or not, multi city or stay). Marketing challenge is to communicate on multiple offers to the same individual
- Messaging should target ladies more often than currently done since they are the ones in charge of the search especially when it is about Family or Couple trips
- For these family trips, especially for Arab travelers (Levant, Egypt, GCC Nationals or GCC Arab expats) planning to control budget, and consider the safety of the travelers is essential
- On the other hand, friends getaways mean freedom, and absence of responsibility, no planning required
- The segmentation is a daily concern and goes beyond segmentation. Moving away from Mass segmentation to Semi-Mass down to “Segment-of-One”. There is a necessity to micro reach clients to be extra relevant in marketing campaigns, touch points and offering. In that context, communicating on Packages is crucial since these are seen by travellers as difficult to customize and addressing masses instead of them as individuals

Messaging / Marketing Recommendations

- During focus group discussions, some GCC Nationals shared the negative impact of over ad campaigns. Receiving too many ads and offers clouds their judgement and makes them doubtful
- Traditional Marketing still contribute to awareness and must continue as it contributes to the passive awareness which is important in the dreaming phase
- The active awareness mostly comes from online and Social Media sharing. Platforms used are more Instagram, SnapChat and YouTube in the region. Facebook and Twitter are losing momentum
- From a digital marketing point of view, differentiating native language is certainly a must and top of the funnel
- Campaigns must be on Mobile if not already
- Trust is one of the biggest obstacles and sources of hesitation in the process. It explains the FF&C importance compared to Reviews or biased Social influencers
- Reviews are crucial however must be relevant / peer related and recent to gain the trust of the traveller

INSIGHT | OUT

Sub-Group Specific

- Egypt
- GCC
- Levant

I | O

10

Egypt

Key Findings

Sub-group specific charts

Key Findings – Egypt

- 86% of respondents are 21 to 40 years old, 66% are married with children (2 or 3 children)
- Frequent travellers with 53% travelling 5+ times a year
- Social with 49% of respondents travelling with families, friends or as multi-families forming smaller groups
- Global with 42% travel internationally. Asia leading at 17% followed by Europe at 14%. Turkey & Lebanon are the 1st destinations followed by traditional European capitals such as Paris, Barcelona, Athens.
- Domestic and regional travel is key for Egyptians with 66% travelling regionally (mainly Dubai or Lebanon) and 68% travelling domestically
- The diverse destination offerings with options for limited budget, provide domestic travellers good pretext for short breaks (38% stay 3 nights on domestic trips).
- They simply like travelling as mentioned by 34% of the respondents

Total Population	**97.5M**
Male : Female	**51:49**
Internet Penetration	**49%**
Mobile Penetration	**60%**
Socio Economic Class (A&B)	**12.2%**

Source:
Population: UN World Population Prospects: 2017 Revision
Internet: Internet World Stats 2017
Mobile: GSM Association 2016
SEC: Euro monitor National Statistics 2017

Key Findings - Egypt

- Egyptians are empowered by technology and believe they are tech savvy as confirmed by 59% of the respondents with travel search dominated by online at 69%
- 59% take their time to shop for best options and deals for their trip and 73% actively search for information (both offline and online)
- Egyptians see themselves as tech & online savvy with 97% of search online and 69% booked online. Trivago, Booking.com, Emirates Airlines and Trip Advisor sites visited first
- When thinking travel, Egypt Air, Booking.com, Trivago, Misr Travel and Emirates Airlines are the top brands that come to mind
- Males are the decision makers in general (53% of male respondents confirm being the sole decision makers) and 56% of female respondents decide with others help
- To satisfy their need and frequency of travel, budget is first to be considered and would influence selection of destination and other travel services
- When selecting hotels, 4- and 5-star hotels with the best deals are their choice, with Millennium, Rotana, and Marriott sited as top brands that come to mind. Apartments are requested when traveling to Dubai since they know the destination very well. Free Wifi, location & availability of online information and clear photos are key selection criteria

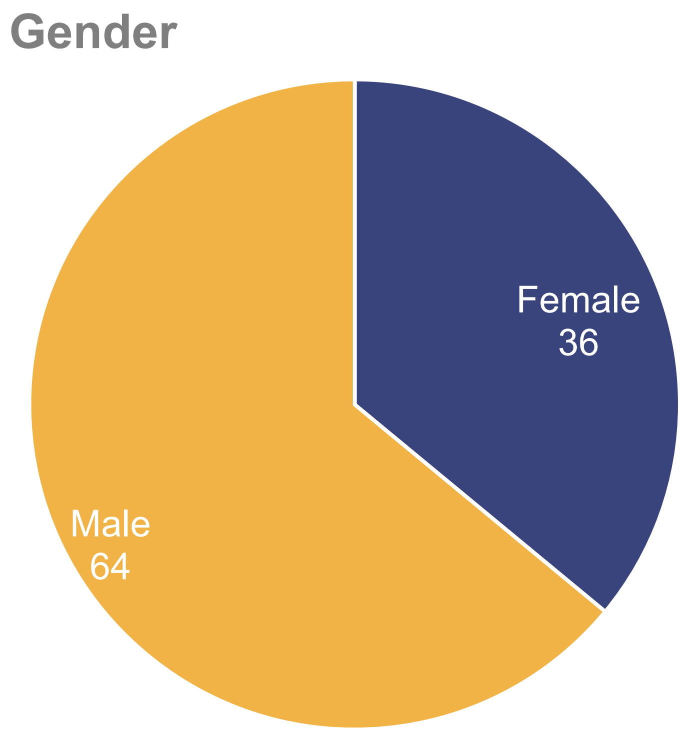
Key Findings - Egypt

- For Airlines- Emirates, Etihad and Egypt Air are the top brands that come to mind and selection is purely price driven
- International travel is well planned 2-4 months ahead of trip and cannot be spontaneous due to visa requirements. Regional and domestic travel is spontaneous and can be booked as short as 4 days ahead
- The availability of Halal Food was mentioned by 41% of the respondents as a criteria (vs. 28% at a regional level)
- 34% of Egyptian residents / nationals read online reviews (vs. 30% at a regional level) and 47% asked for FF&C recommendations (vs. 48% at a regional level)
- Egyptian travellers read <u>and</u> share more than the rest of the region post-trip

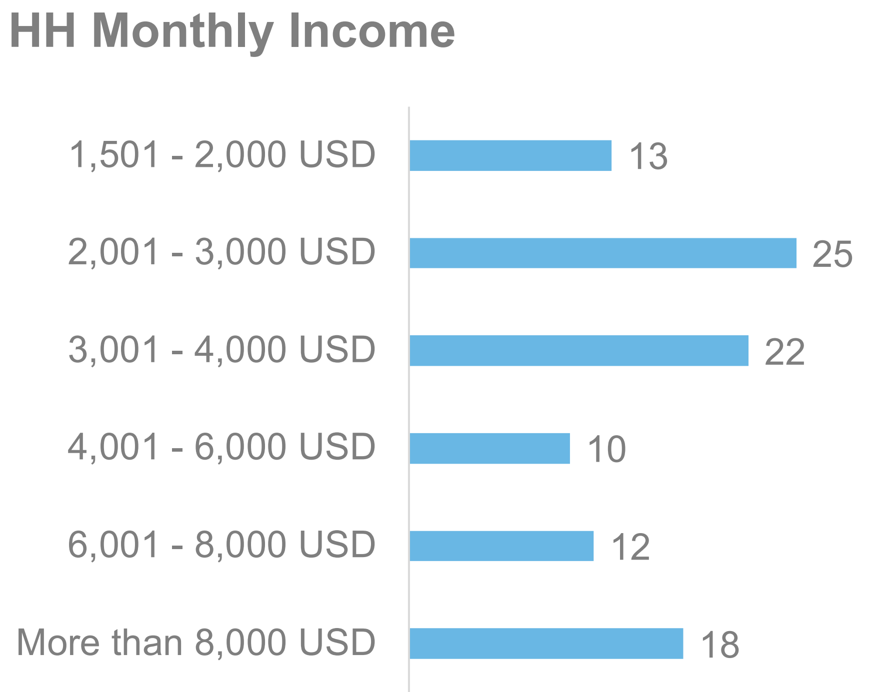
" I read and write reviews. If had issues with someone in particular, I will # hashtag him. If I had a problem with a hotel, I # hashtag its name on my Facebook page."

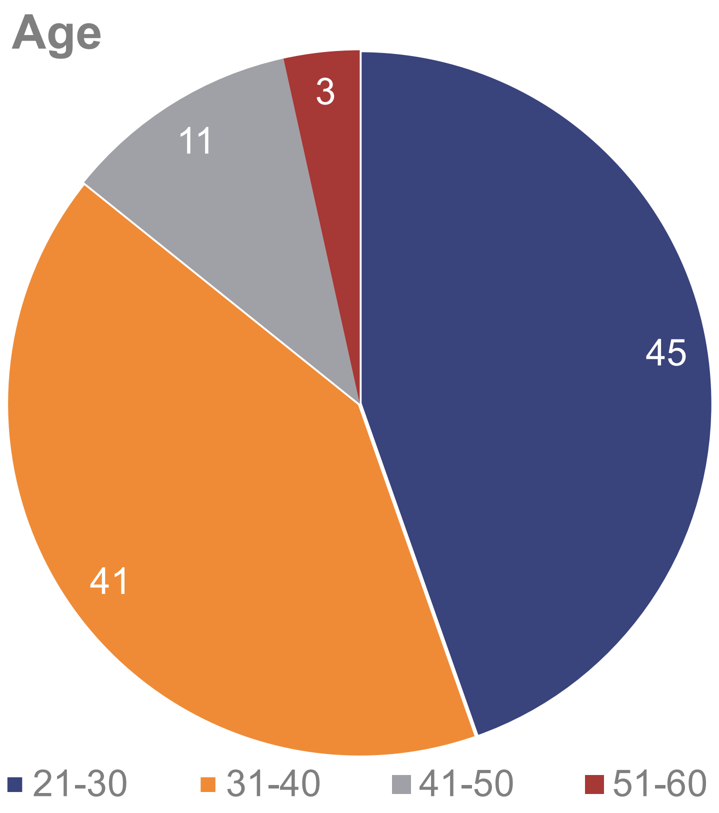
Egyptian lady respondent
Focus Groups

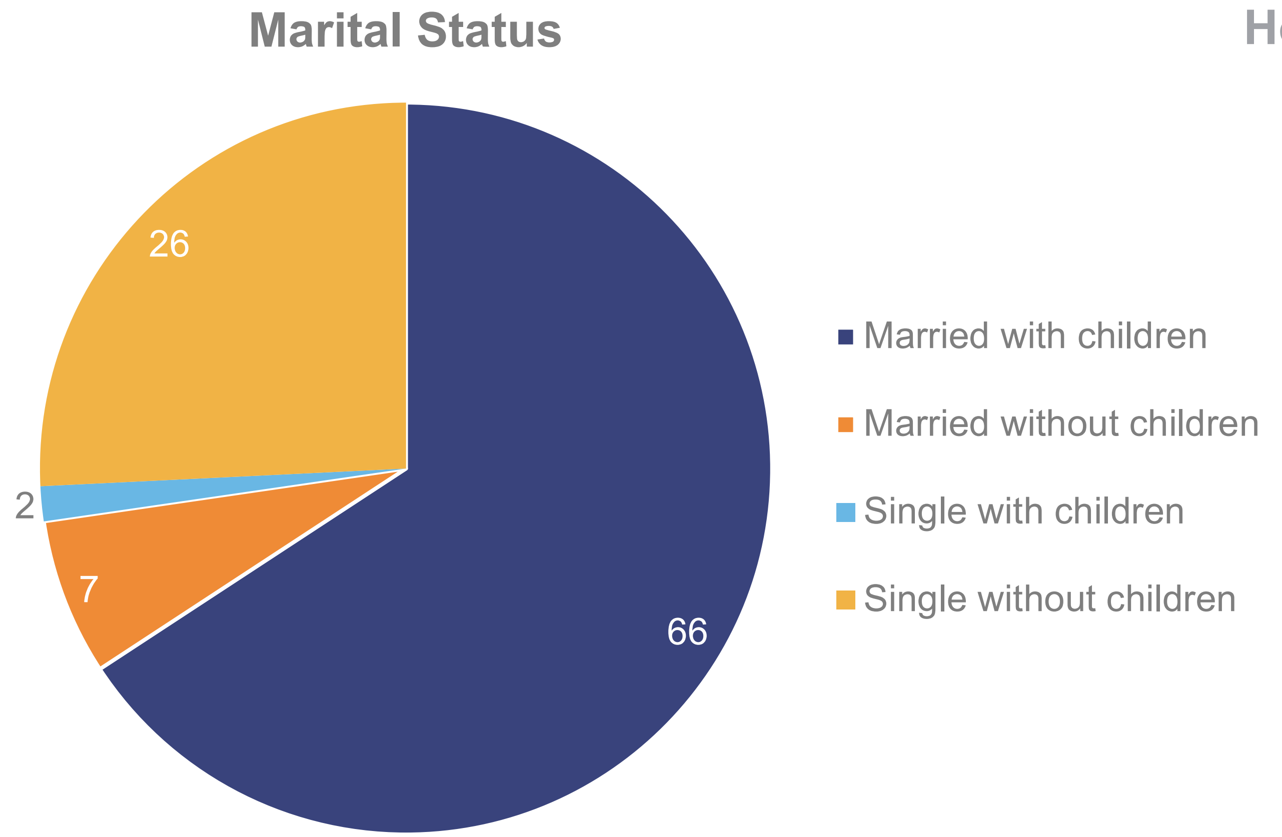
Sample Composition

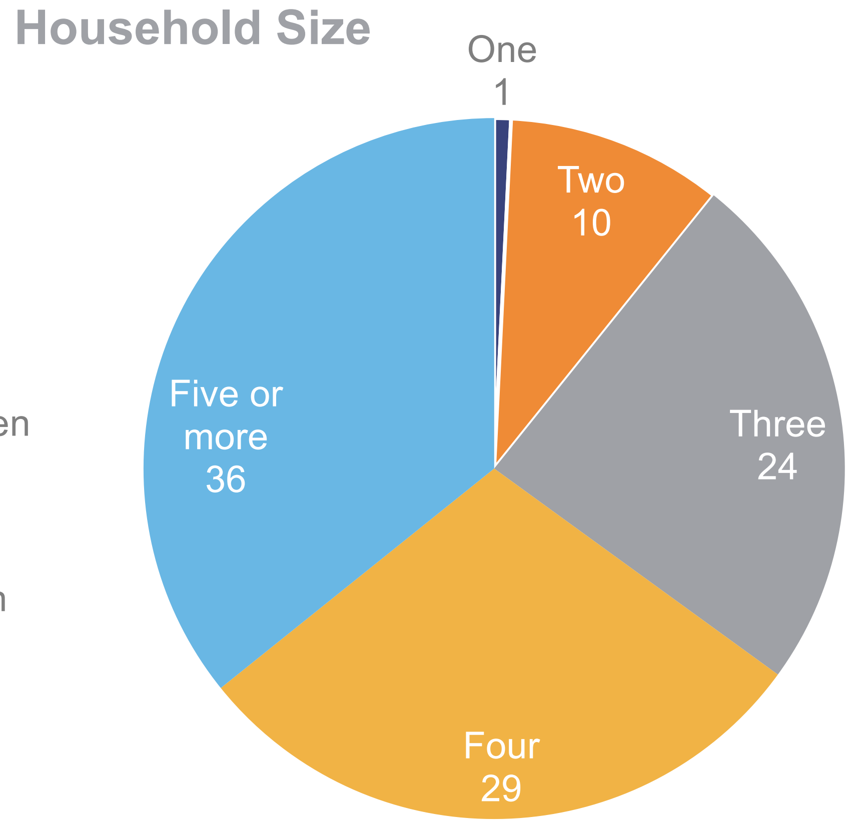


86% of respondents are 21 to 40 years old
66% of respondents are married with children
(2 or 3 children)





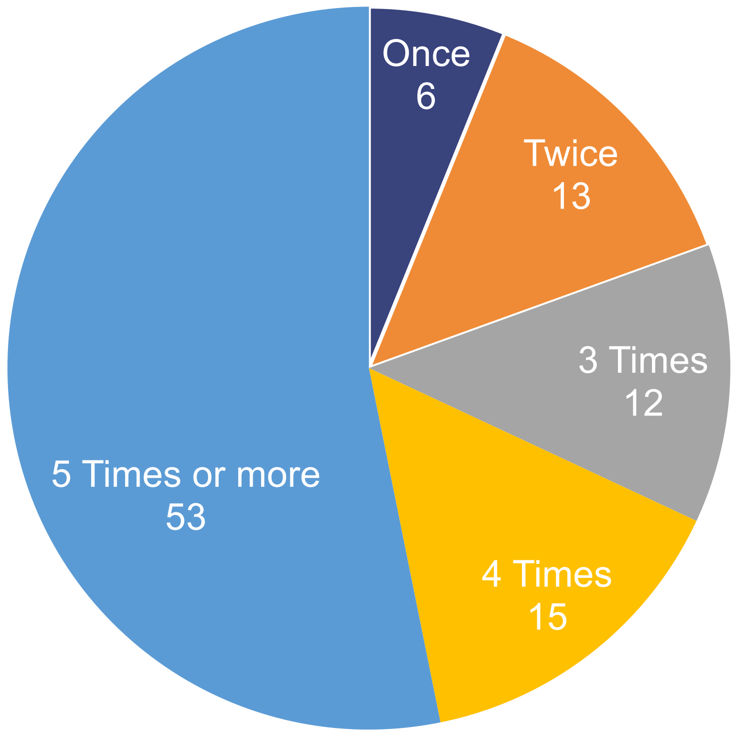




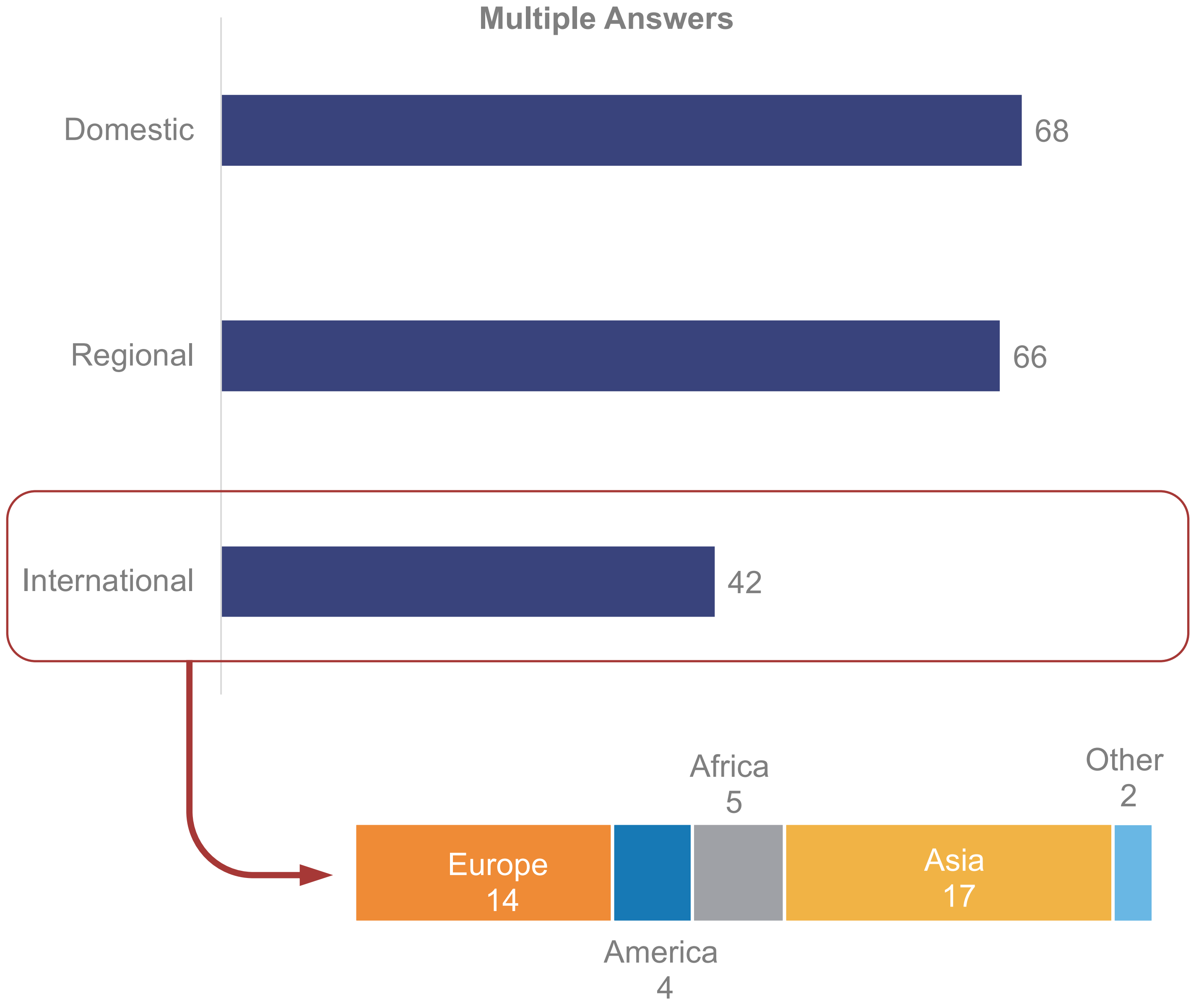
Travel

Frequent with 53% traveling 5 times +.
Social with 65% travelling with family and friends
Global with 42% travelling internationally

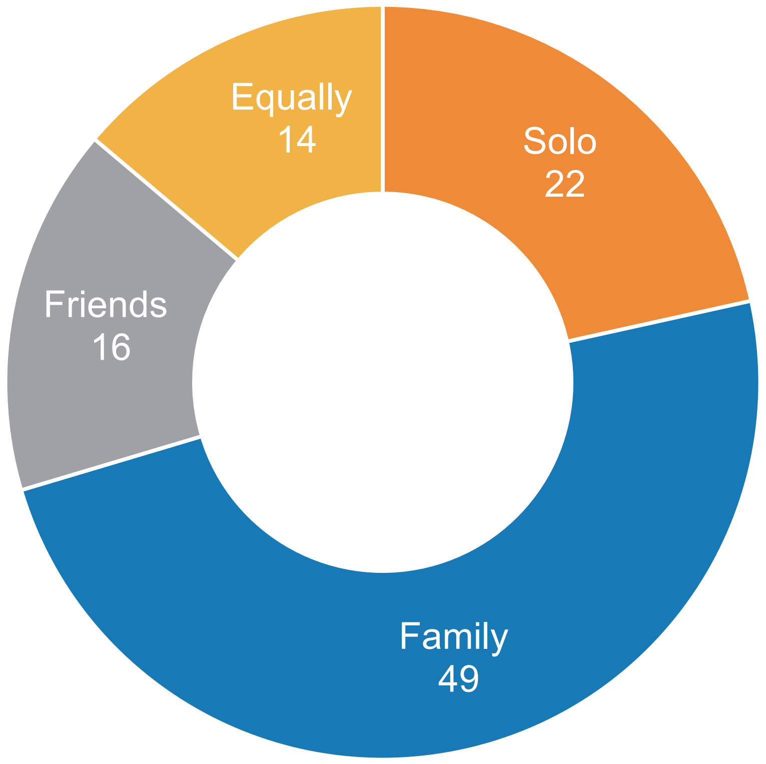
Frequency



Destination

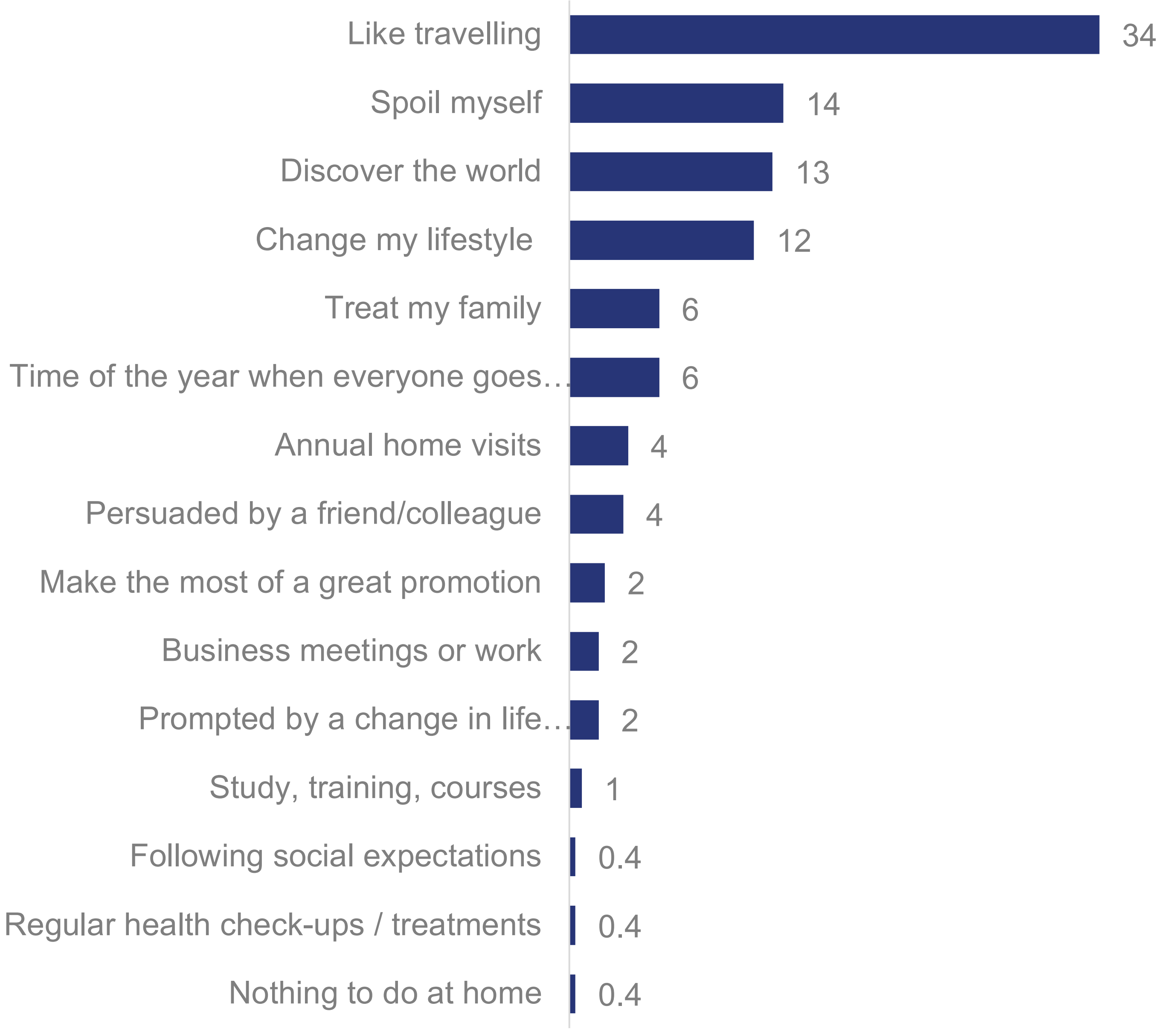


Companionship

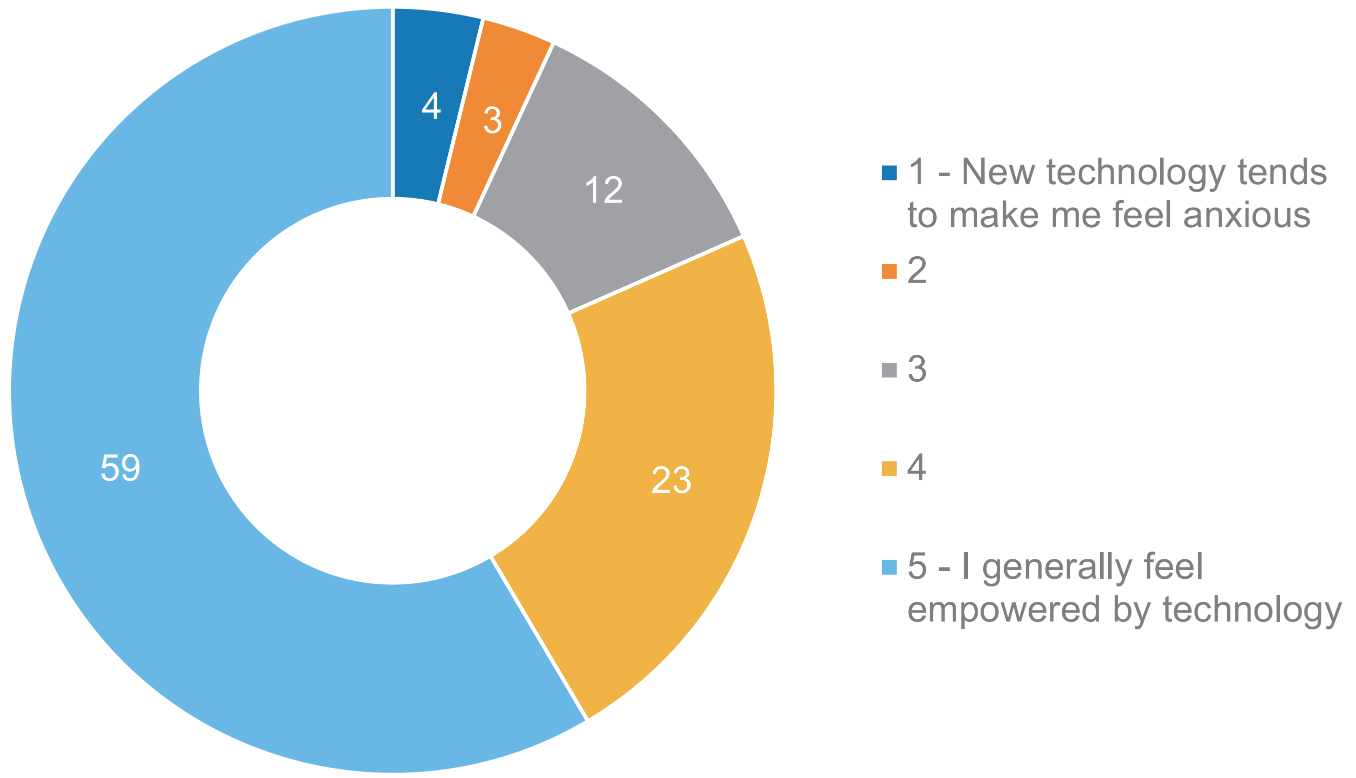


Mindset When Booking Travel

Motive for travelling

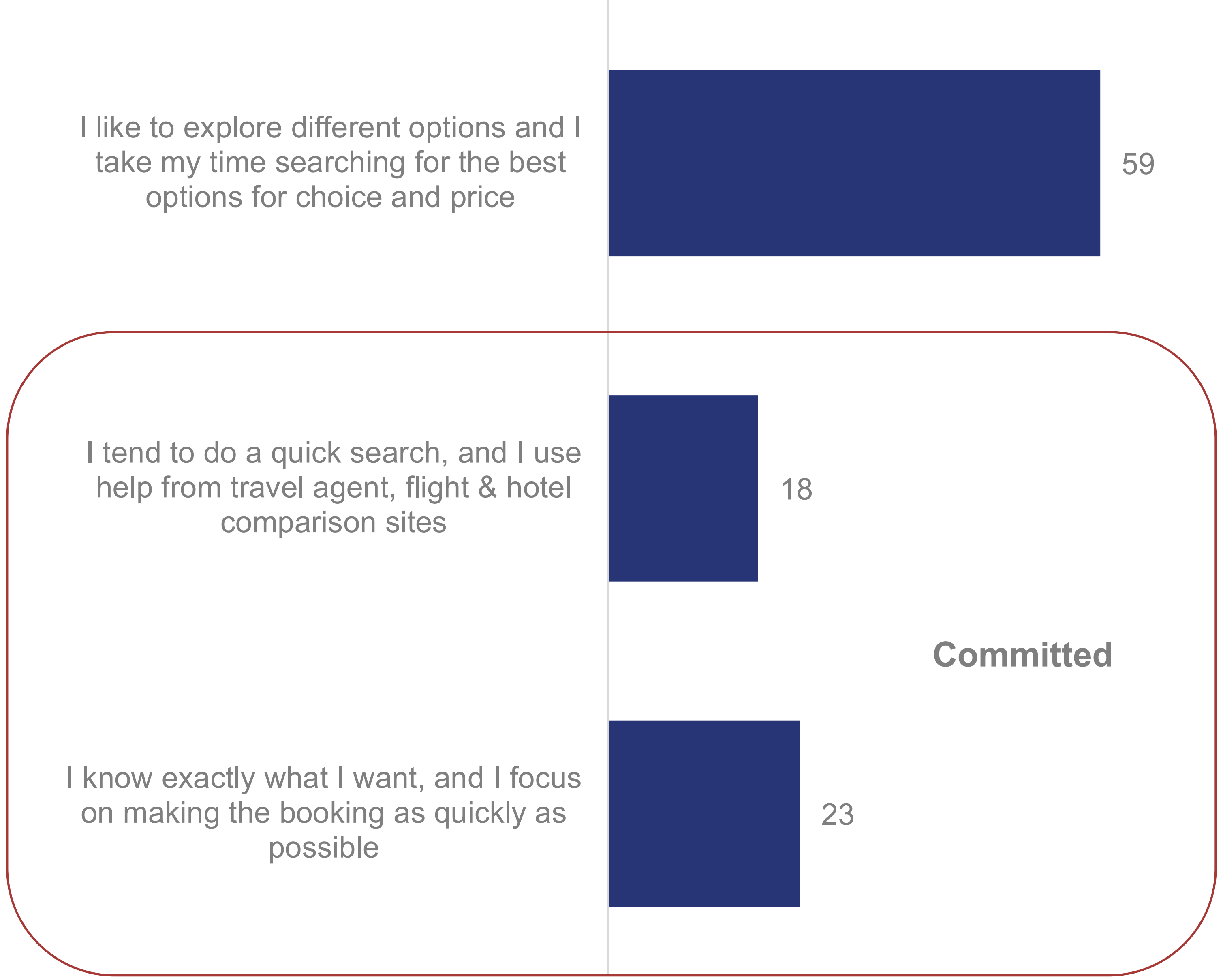


Tech savviness

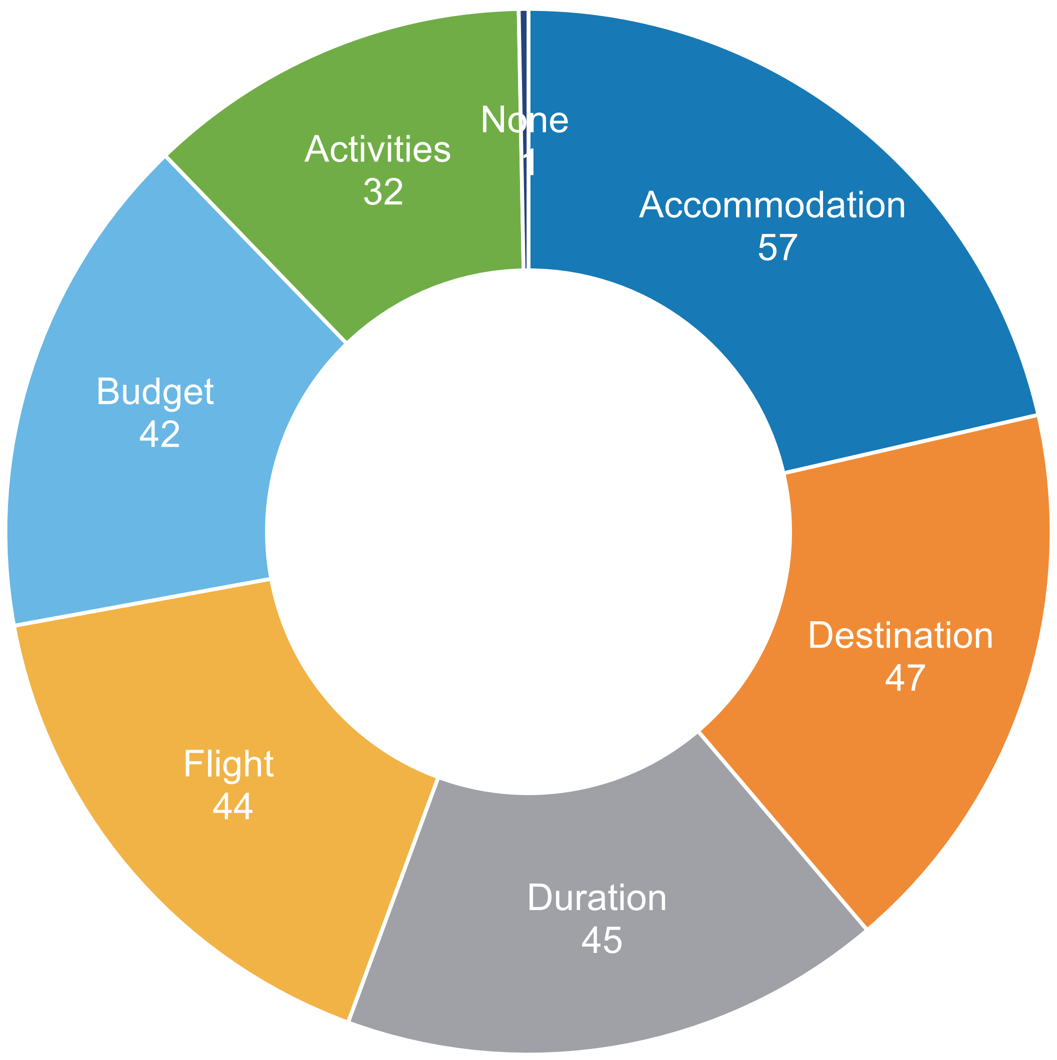


Mindset When Booking Travel

Exploration

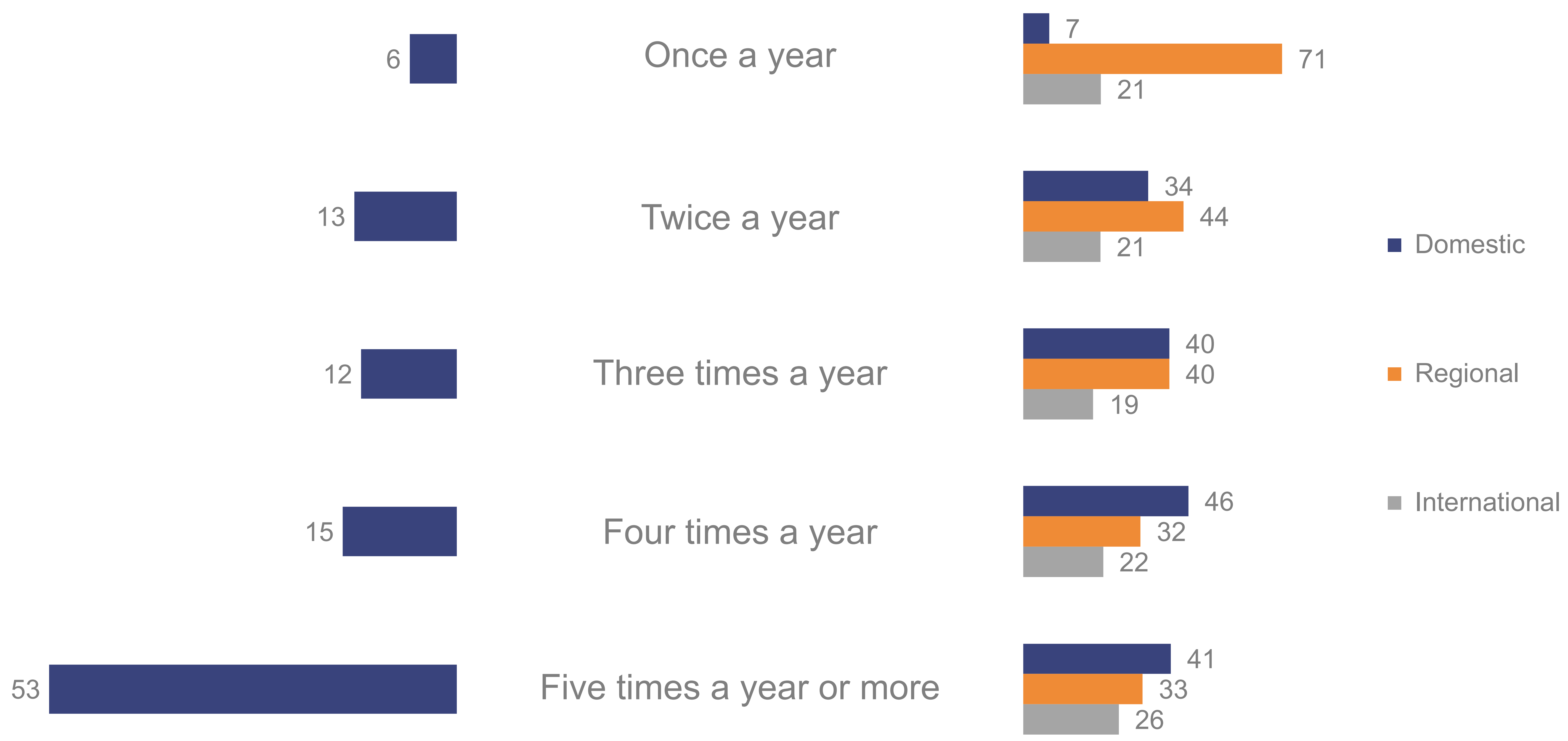


Pre-Determination



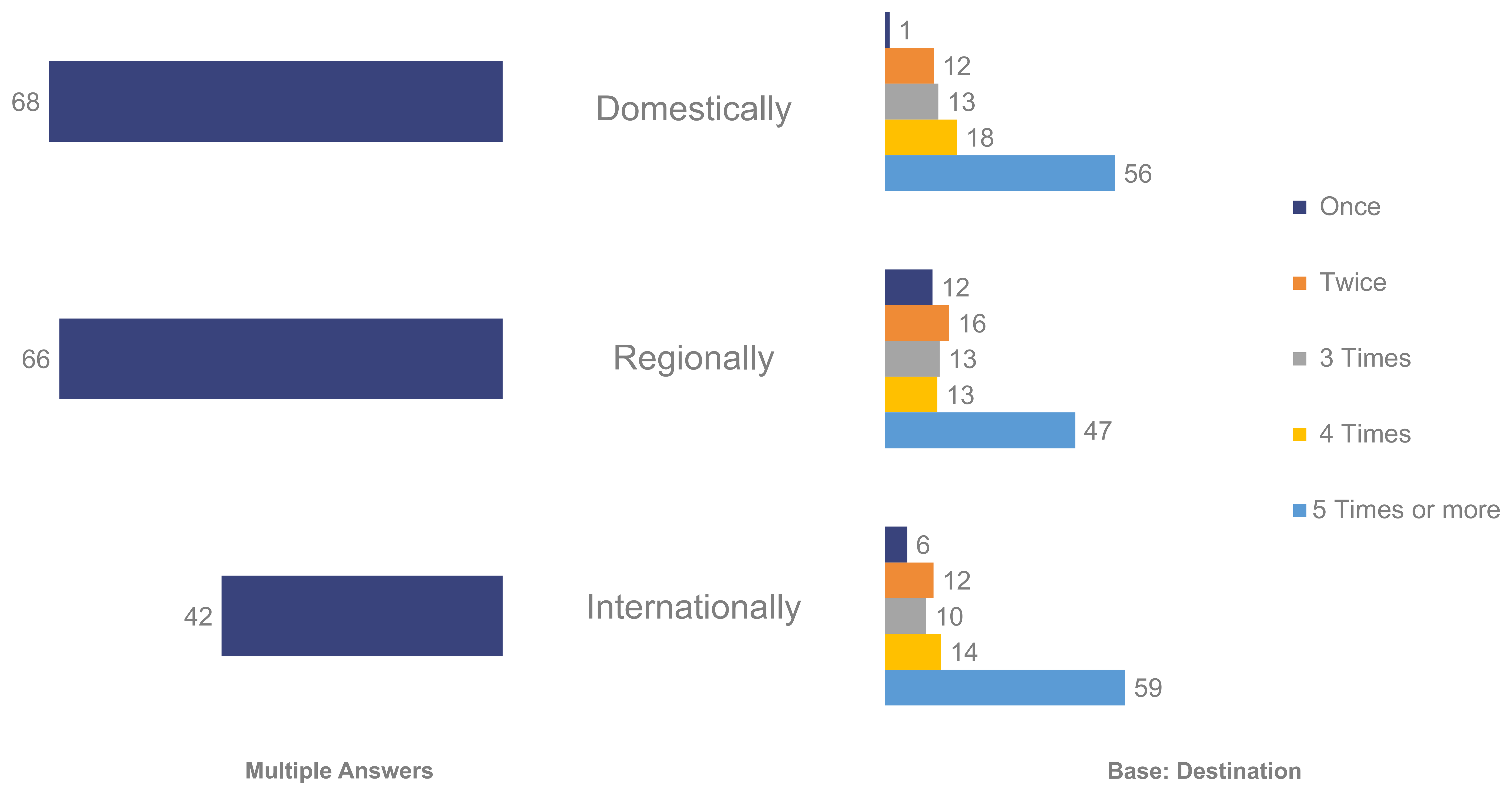
OPEN 59 **COMMITTED 41**

Travel Patterns by Frequency



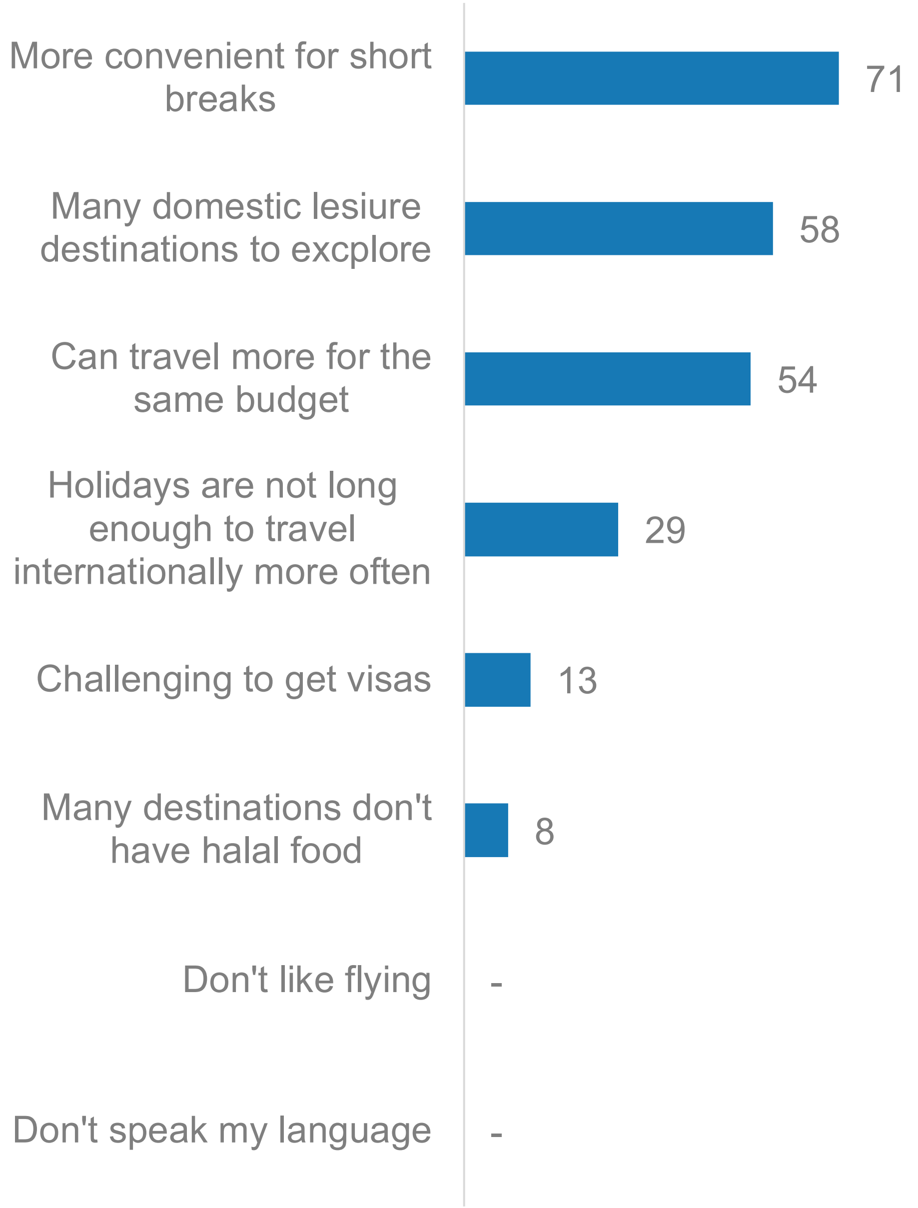
Base: Frequency

Travel Patterns by Destination



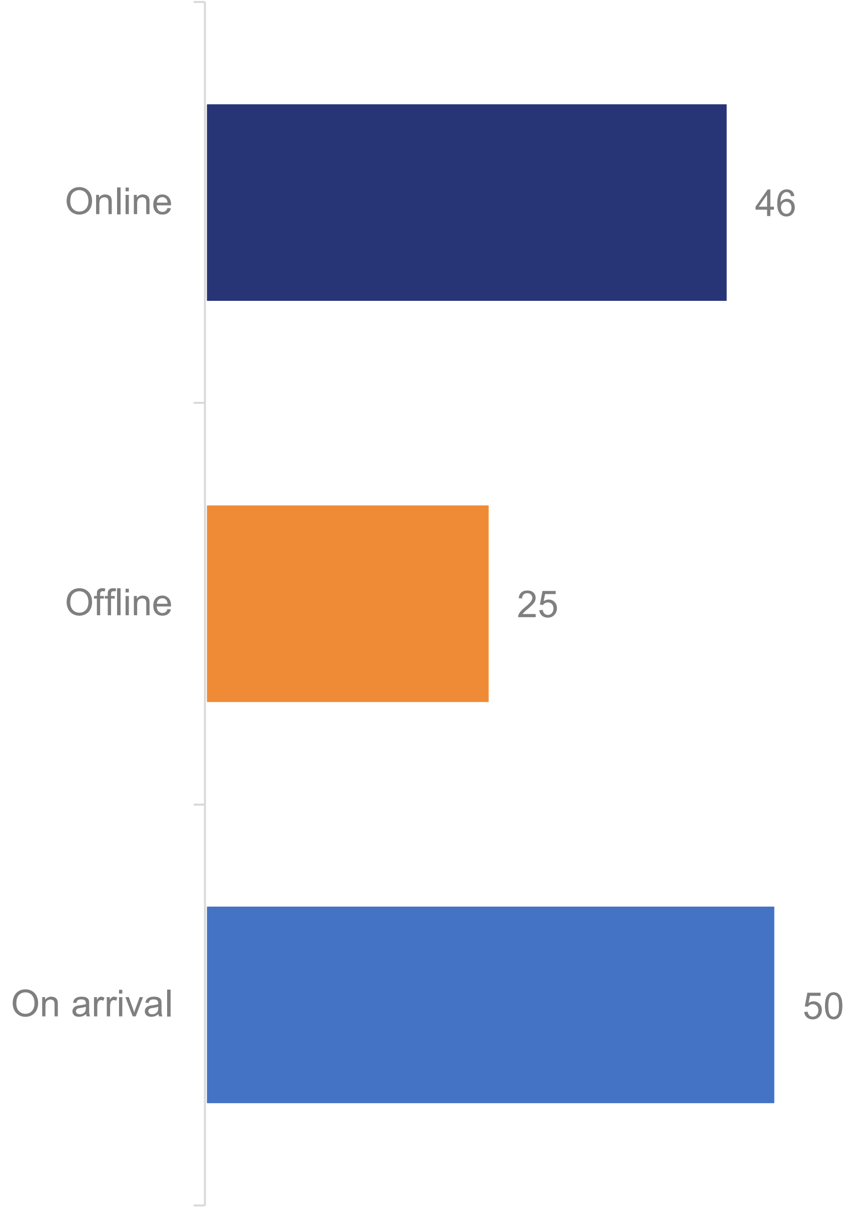
Domestic Travel

Reasons



Duration

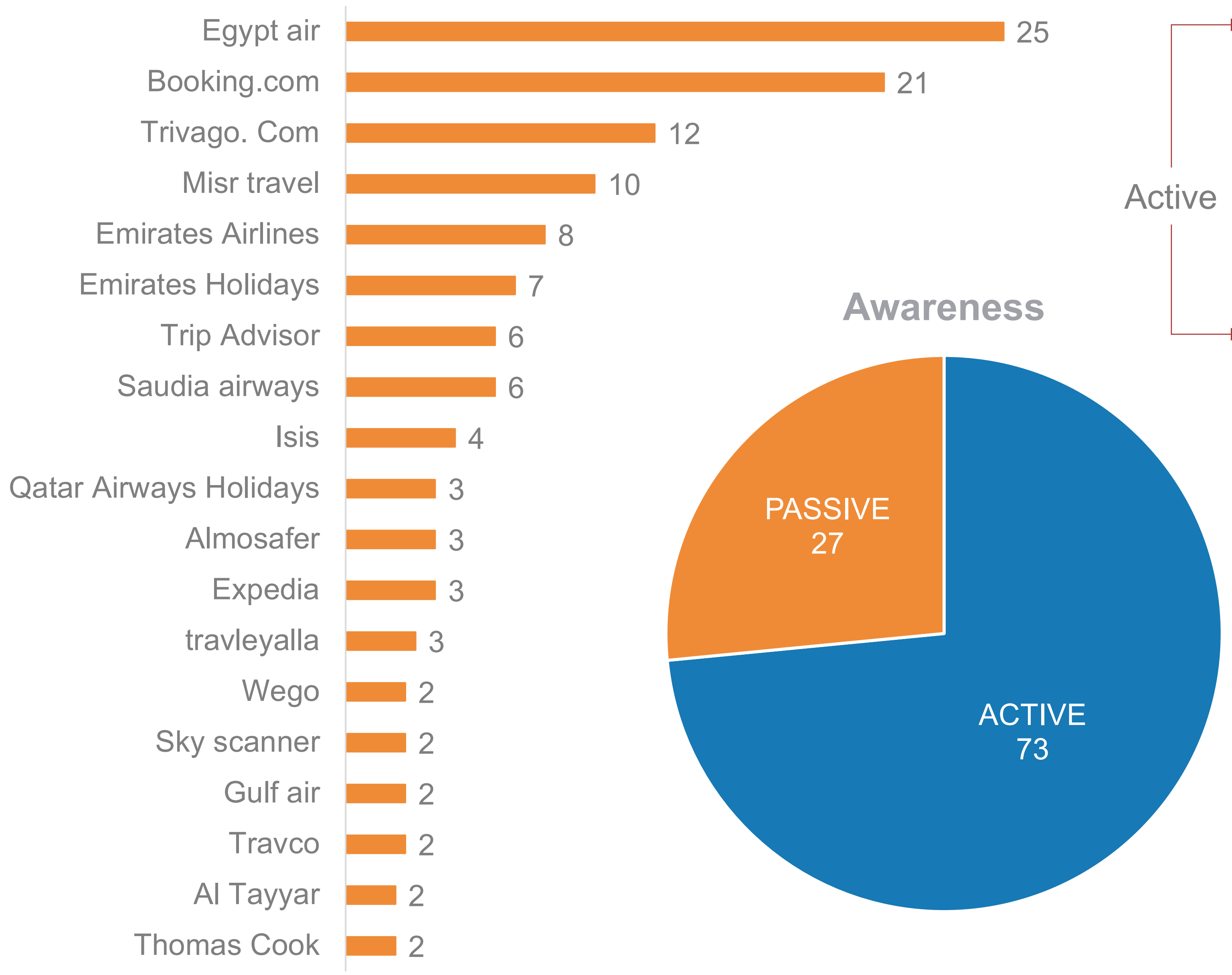
Payment



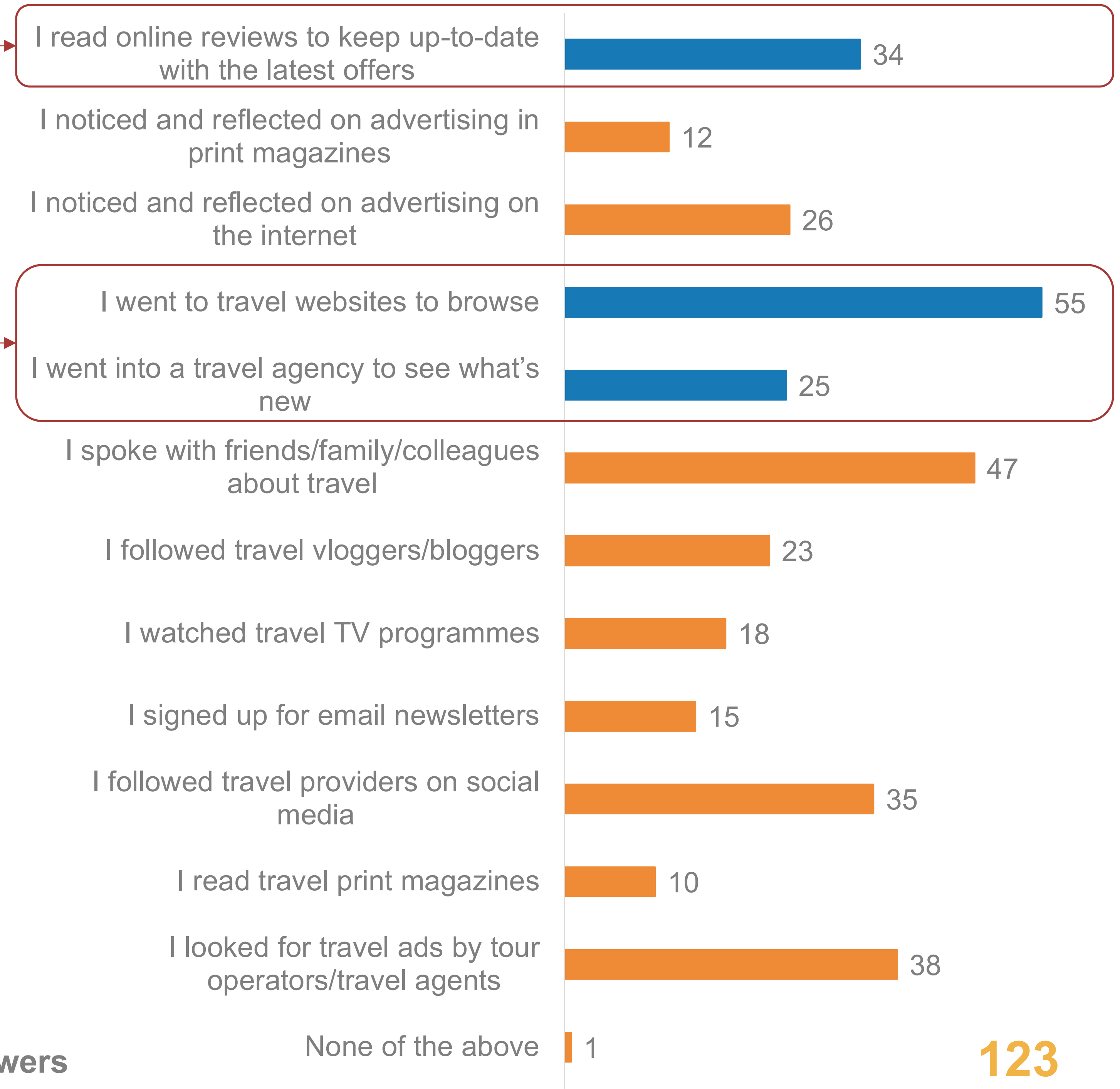
Multiple Answers

Awareness

Top-of-Mind



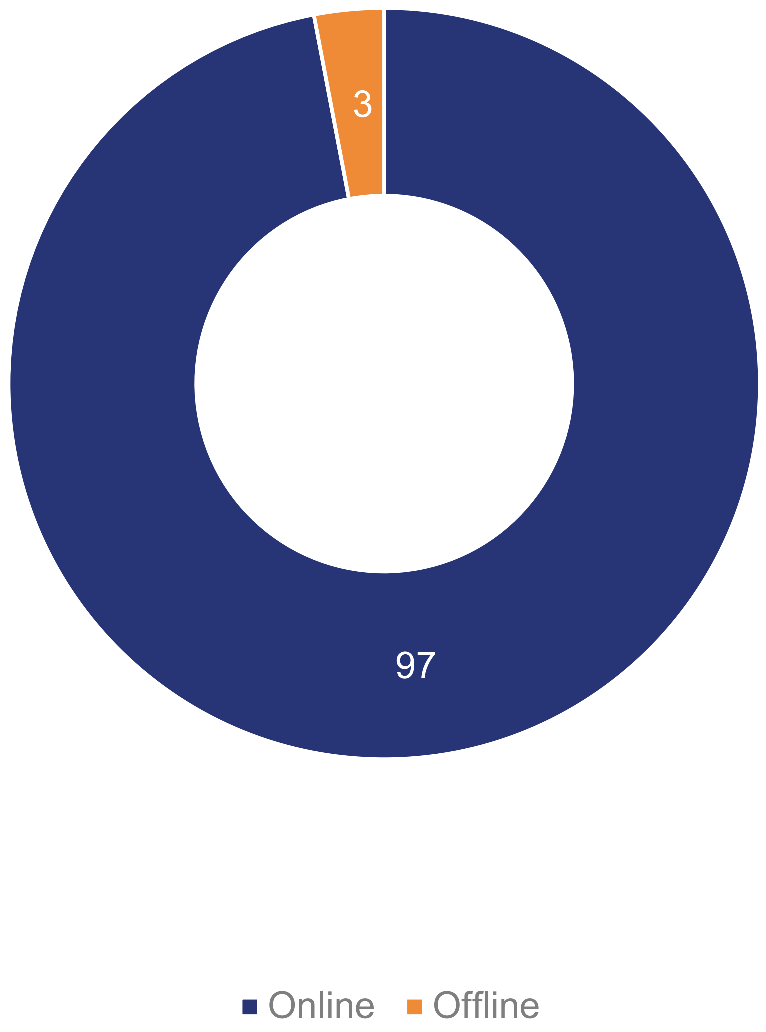
Sources of travel info



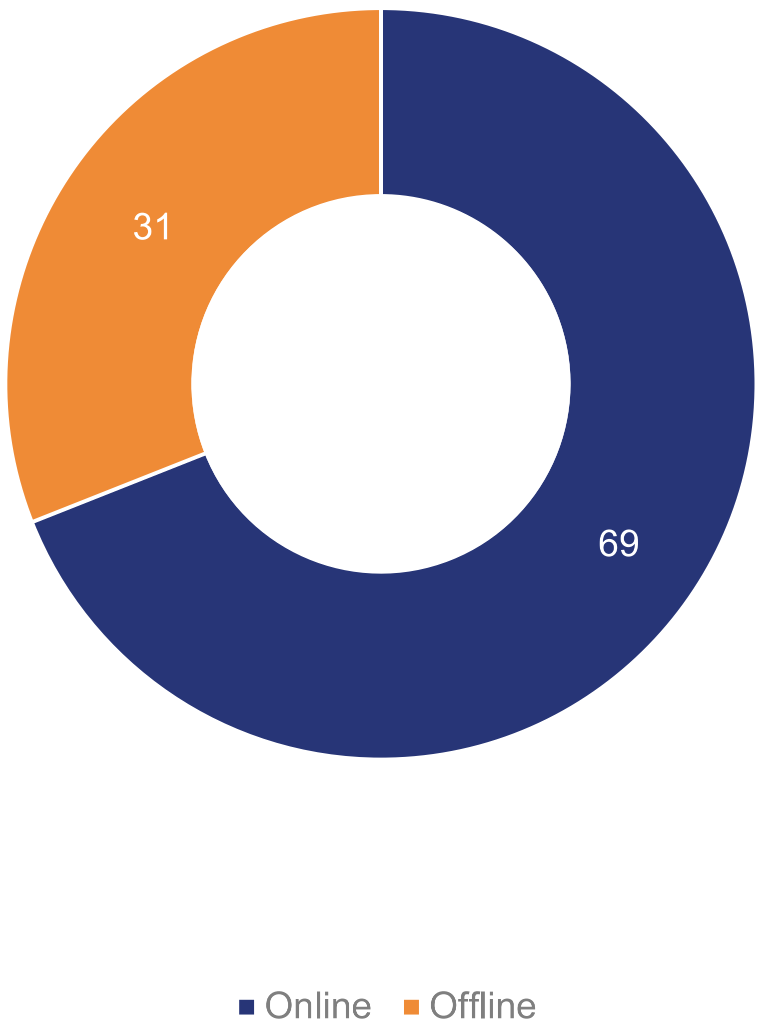
Multiple Answers

Leisure Travel… How?

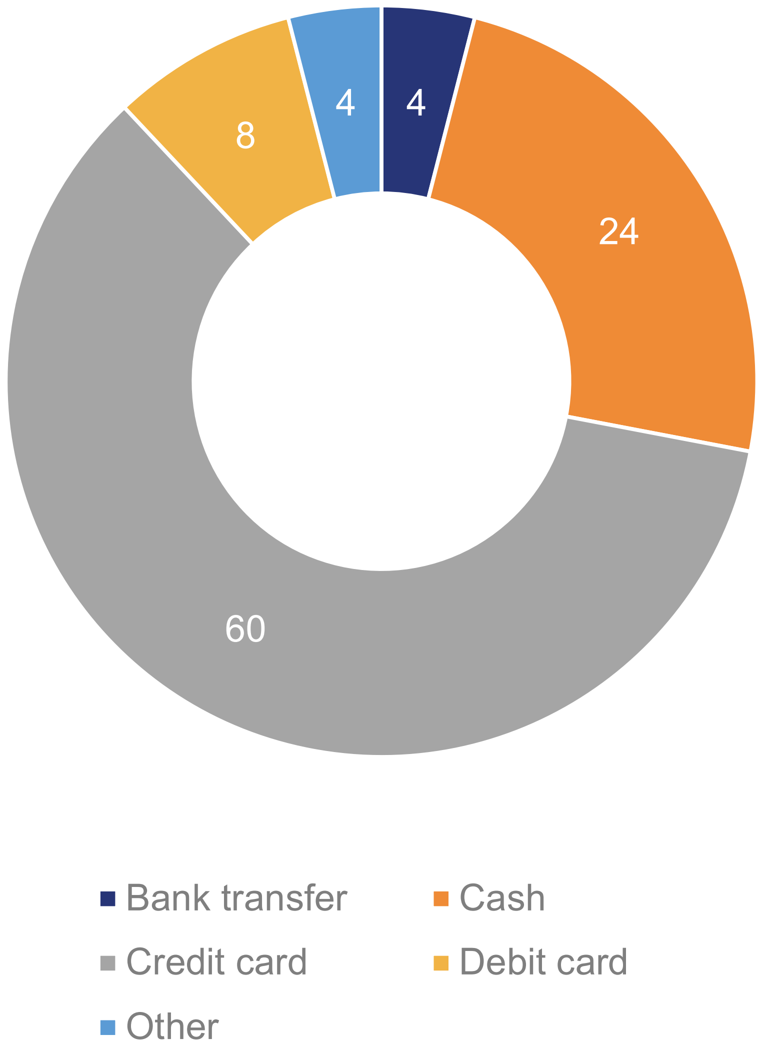
Search



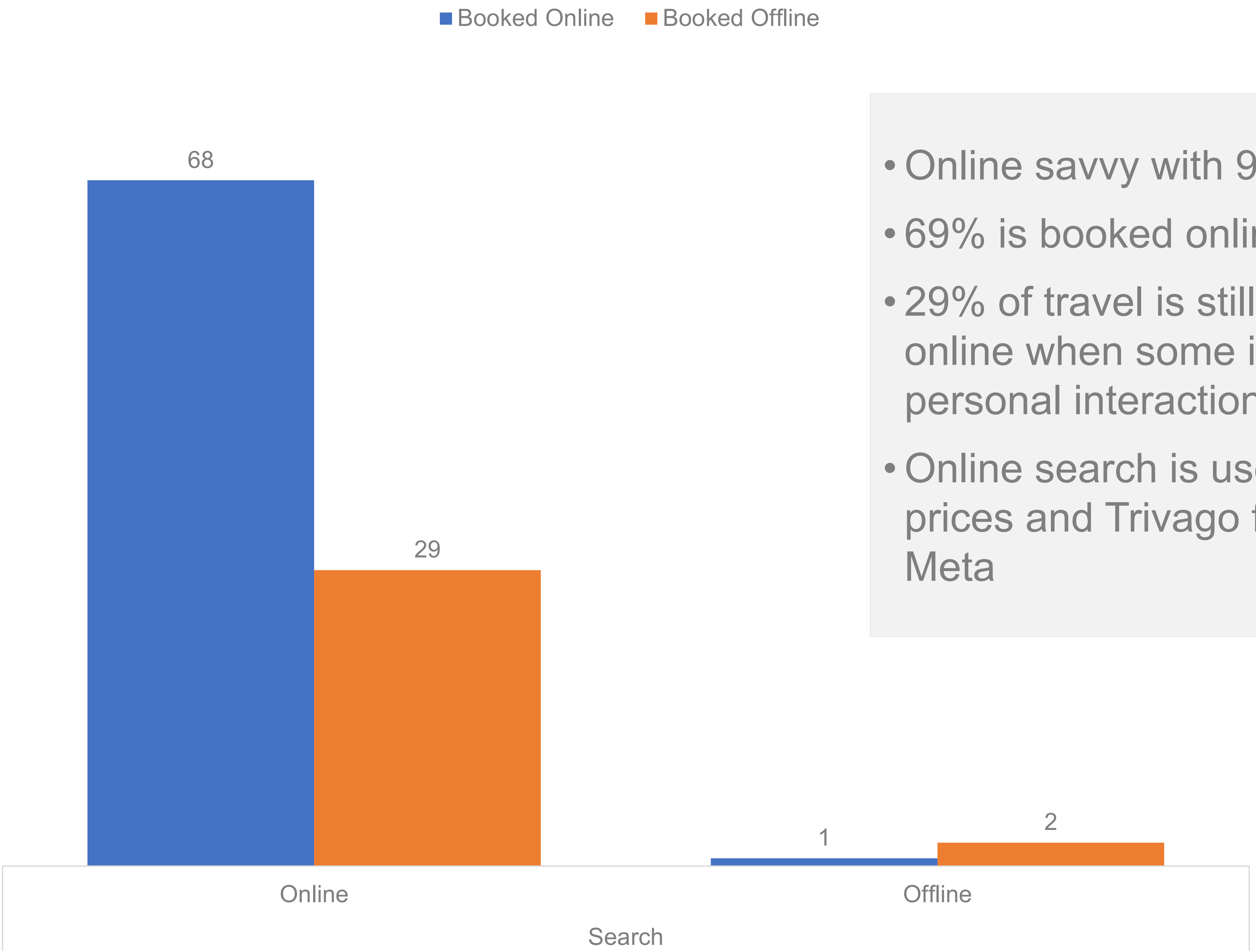
Book



Pay

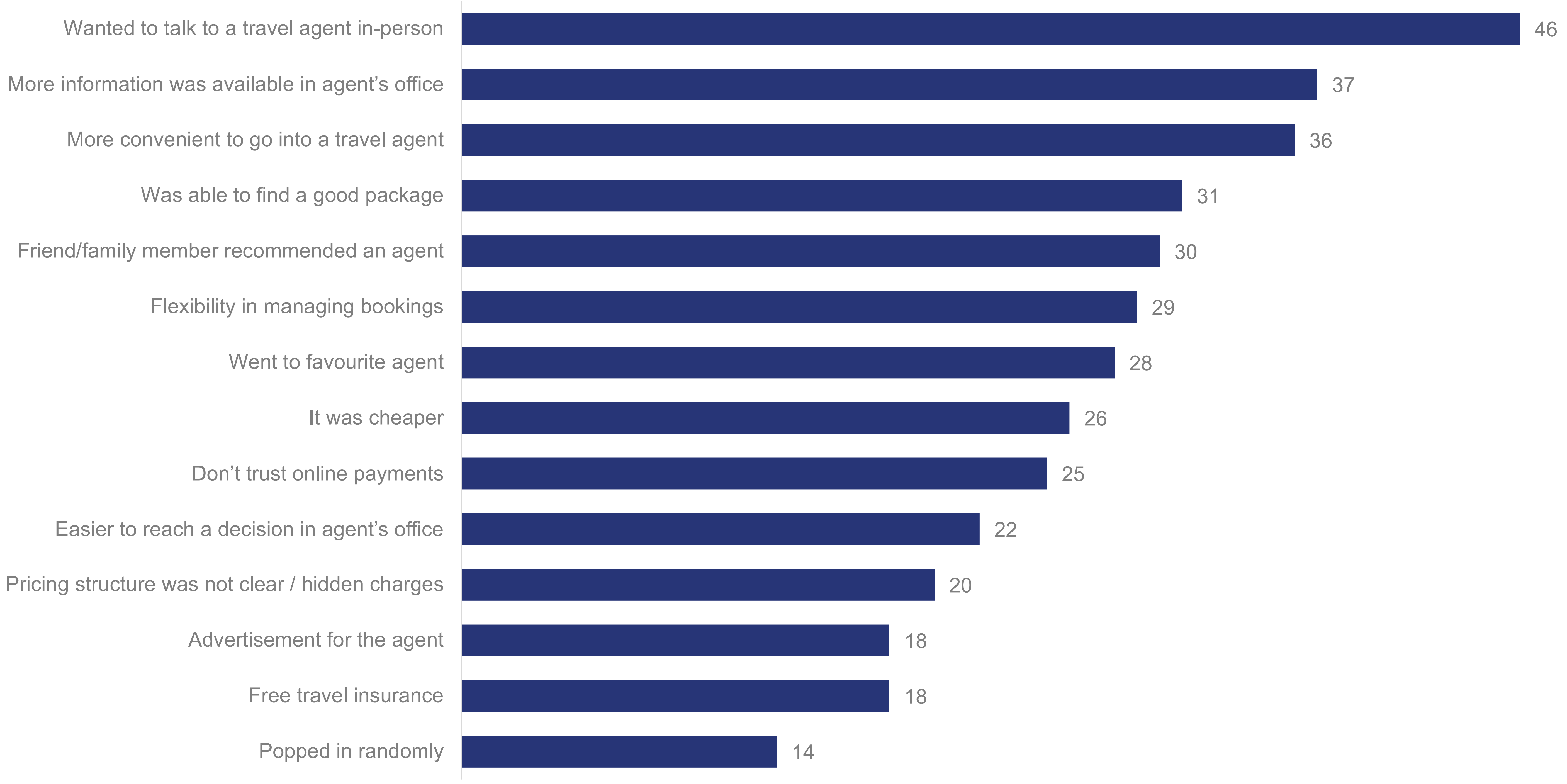


Search & Booking – Online vs. Offline



- Online savvy with 97% of searches conducted online
- 69% is booked online
- 29% of travel is still booked offline but mostly searched online when some information is missing or needs a personal interaction
- Online search is used for shopping and comparing prices and Trivago followed by Skyscanner leads in Meta

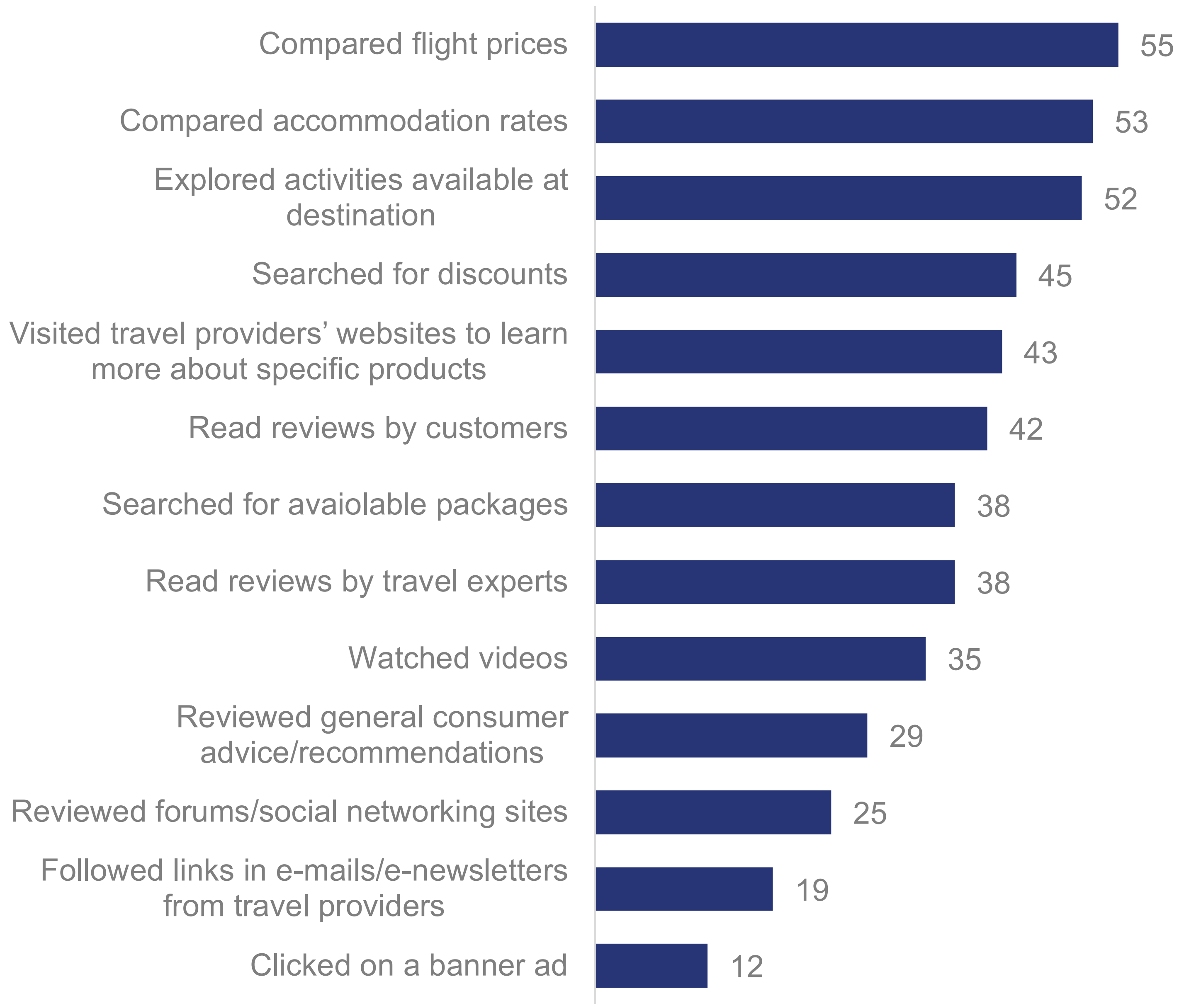
Searched Online but Booked Offline



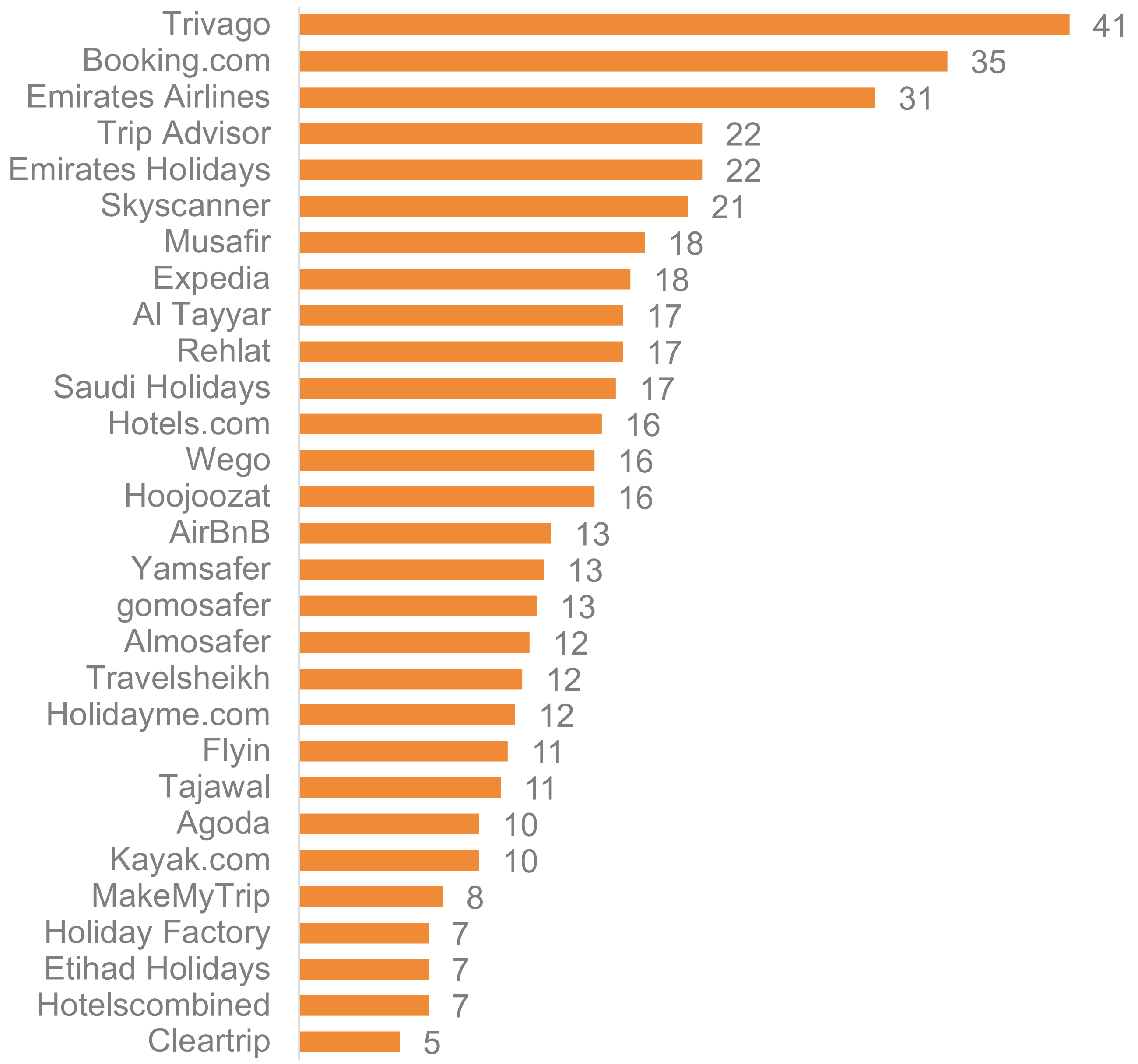
Multiple Answers

Online Search Points

Process



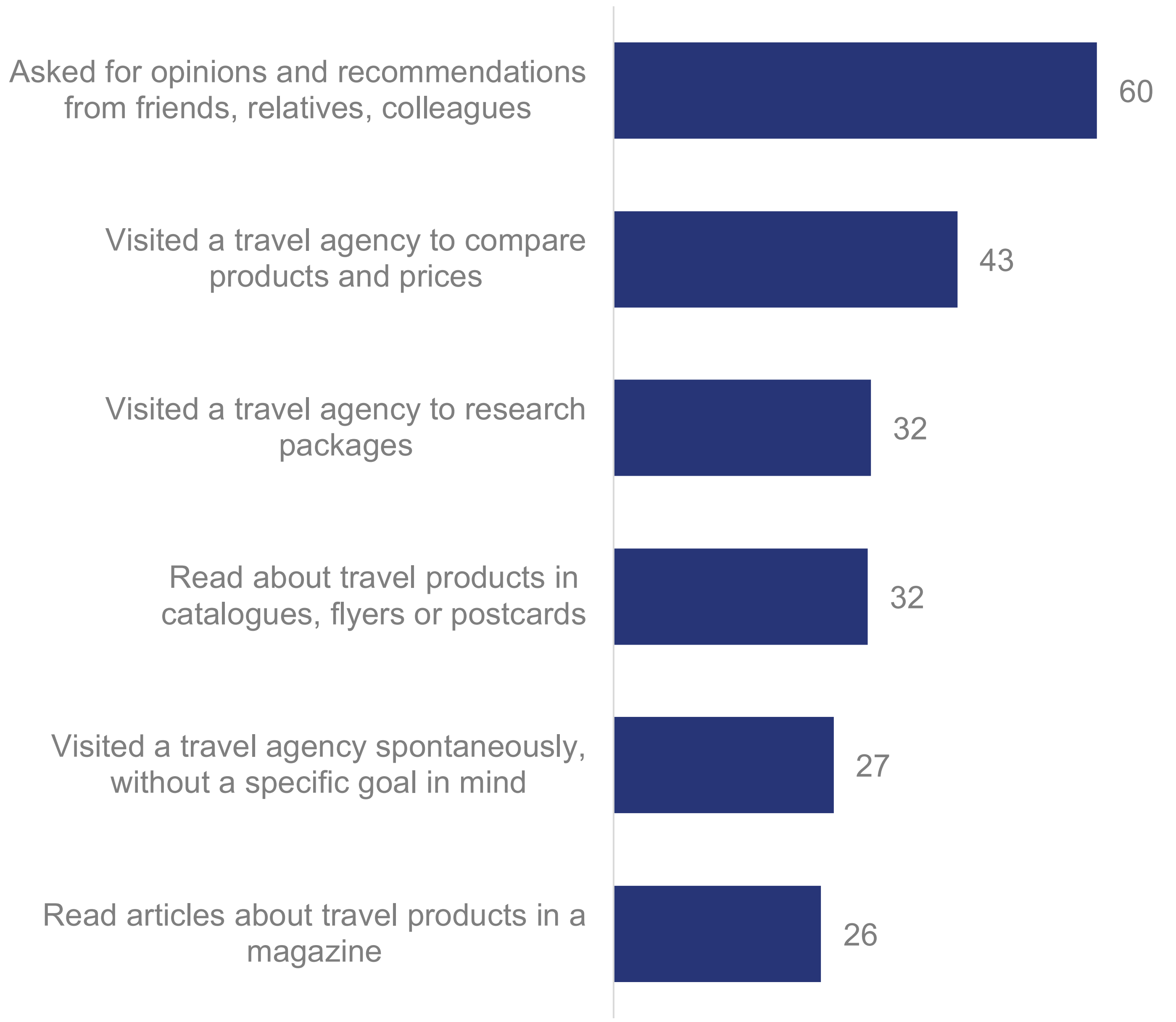
Top websites



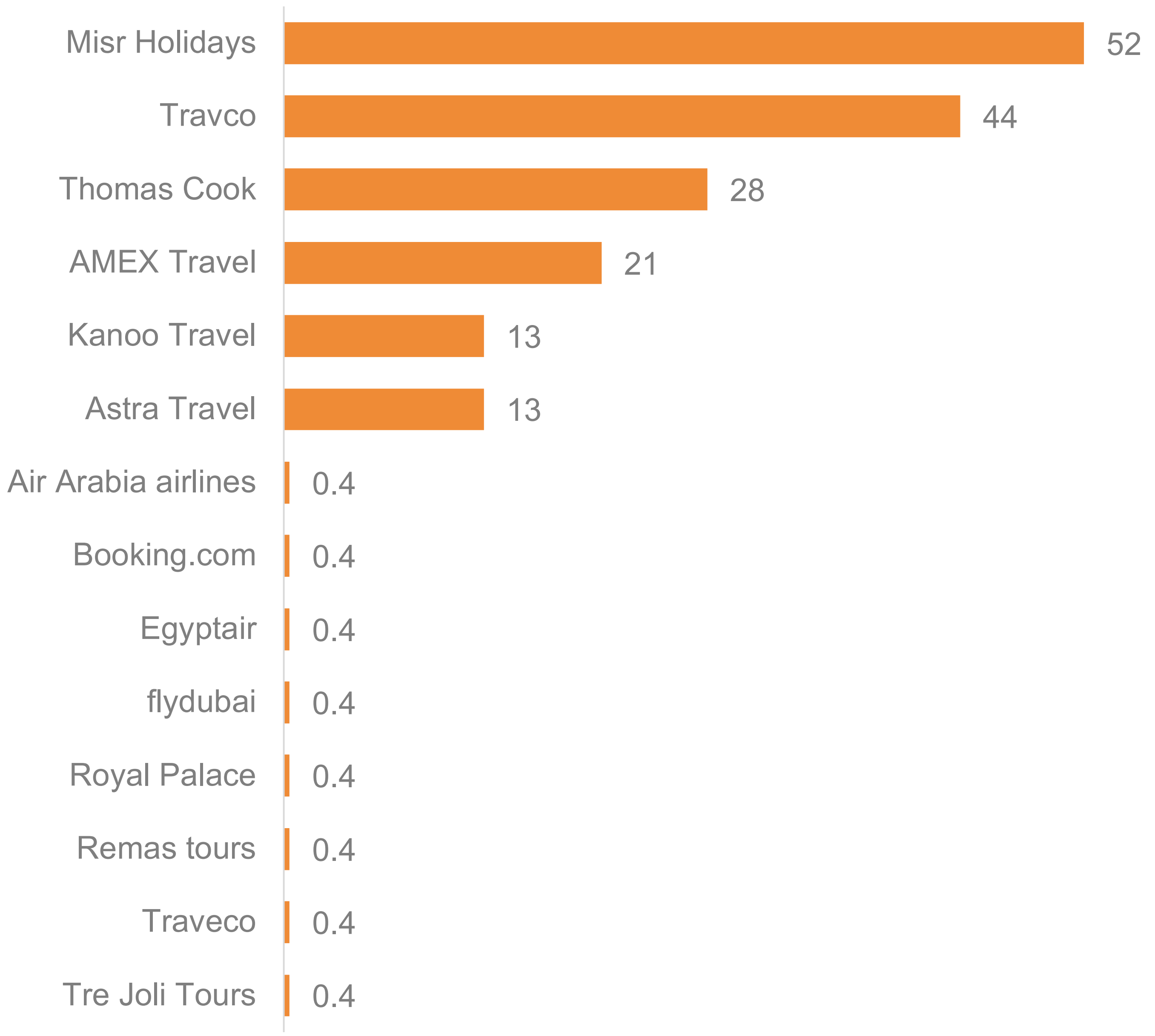
Multiple Answers

Offline Search Points

Process

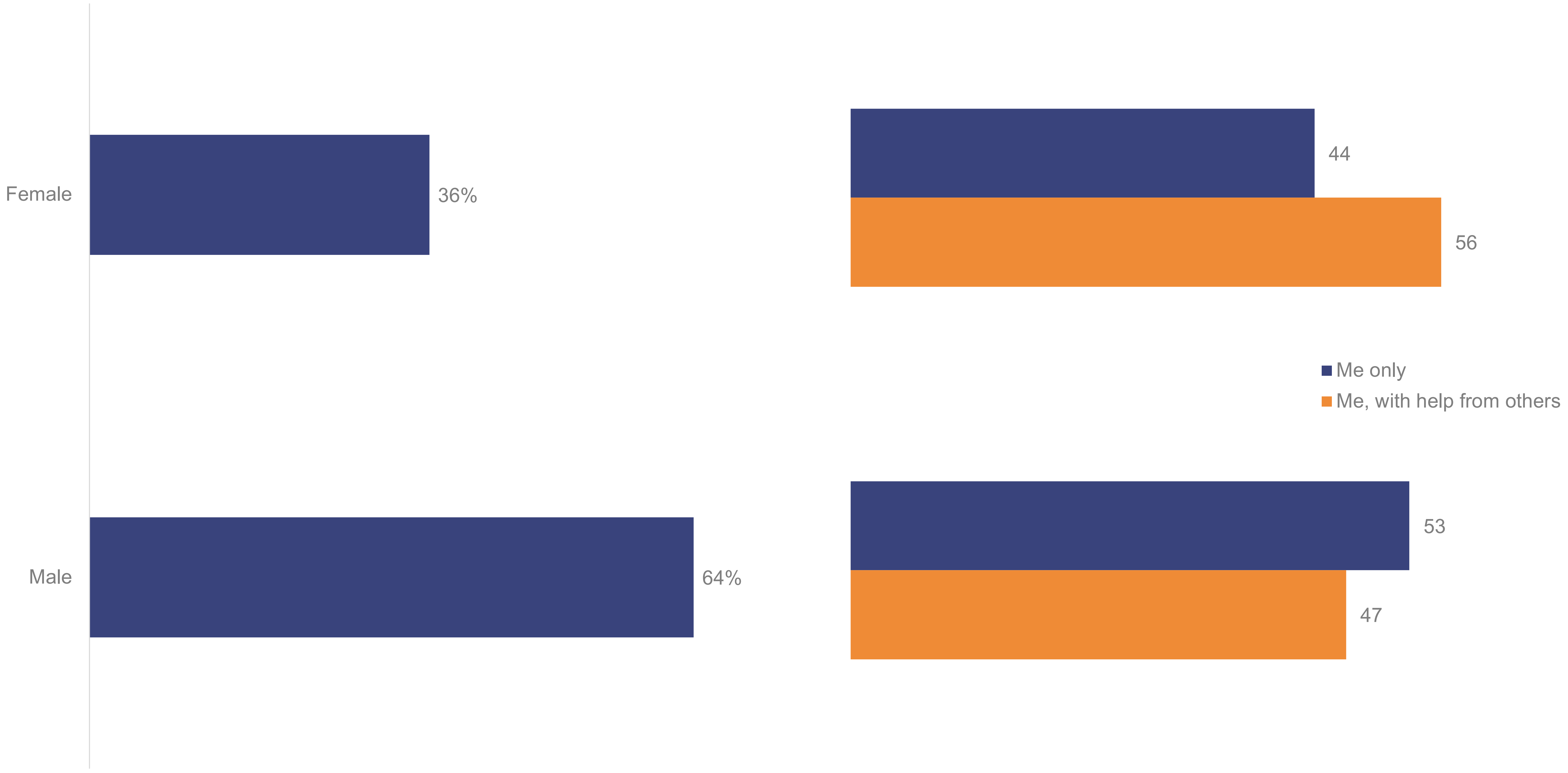


Top Agents



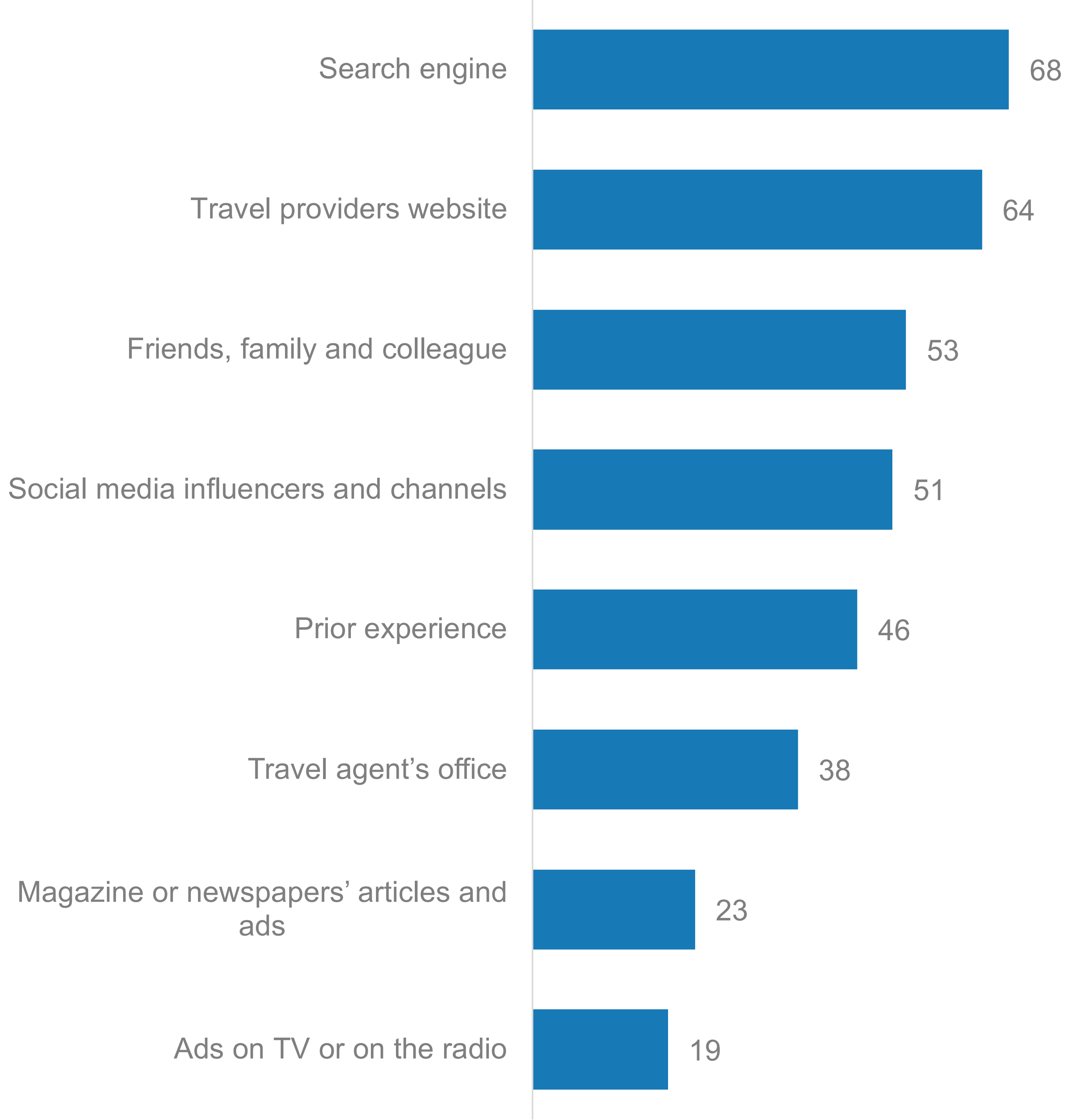
Multiple Answers

Decision Process: Who Decides?



Influencers

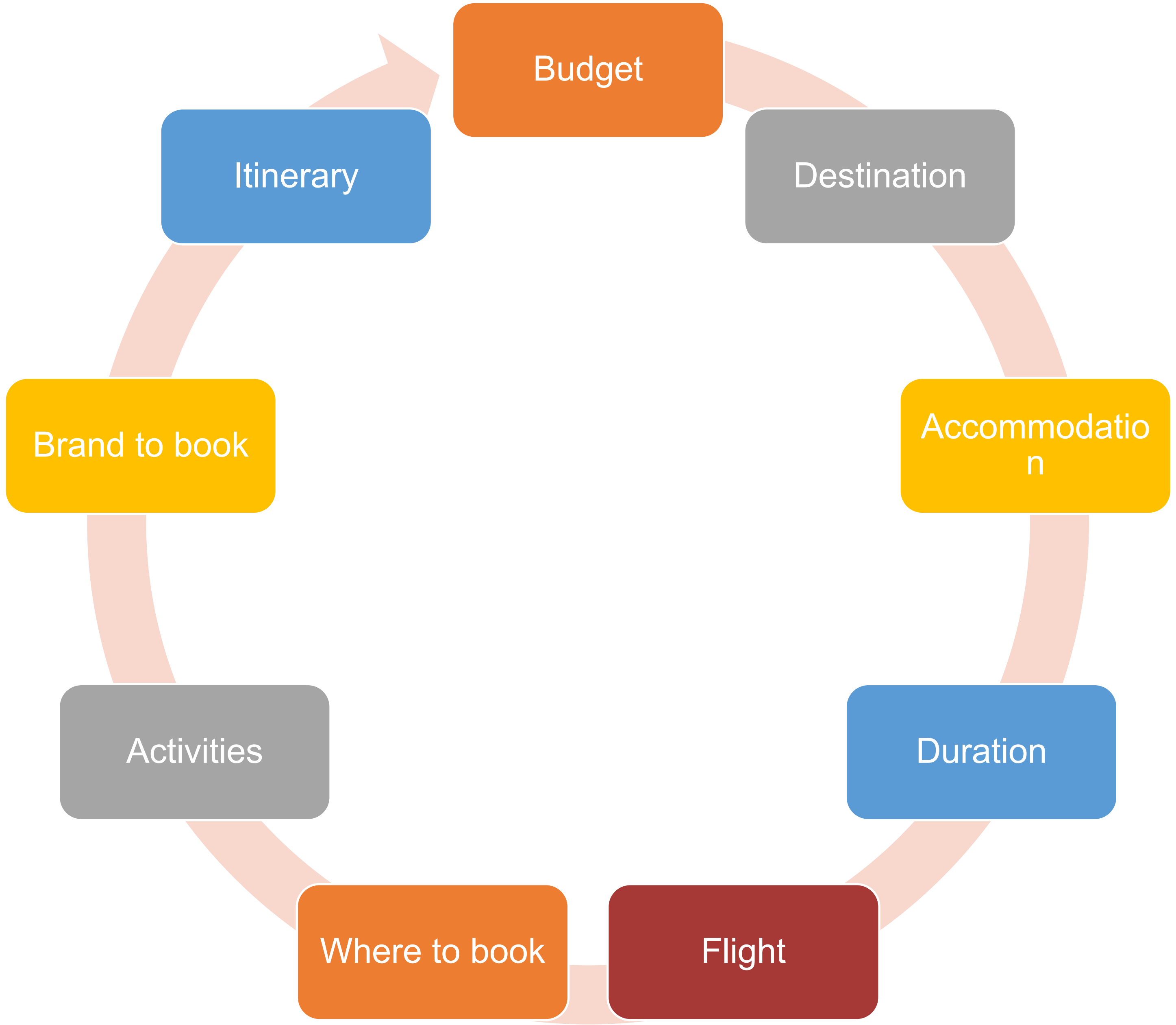
- In addition to the information collected during their active search process, some key stakeholders will influence the travellers choice in regards to the Destination, Activities, Flight, Accommodation etc)
- 64% (vs. 46% at a Regional level) are influenced by Travel providers, 68% (vs. 47% at regional level) by Search engines and review sites
- 53% of respondents admitted to being influenced by Friends, Family & Colleagues
- 38% were influenced by the Travel Agent
- Offline marketing both ATL and BTL are of low impact vs online and personal interaction – in line with region



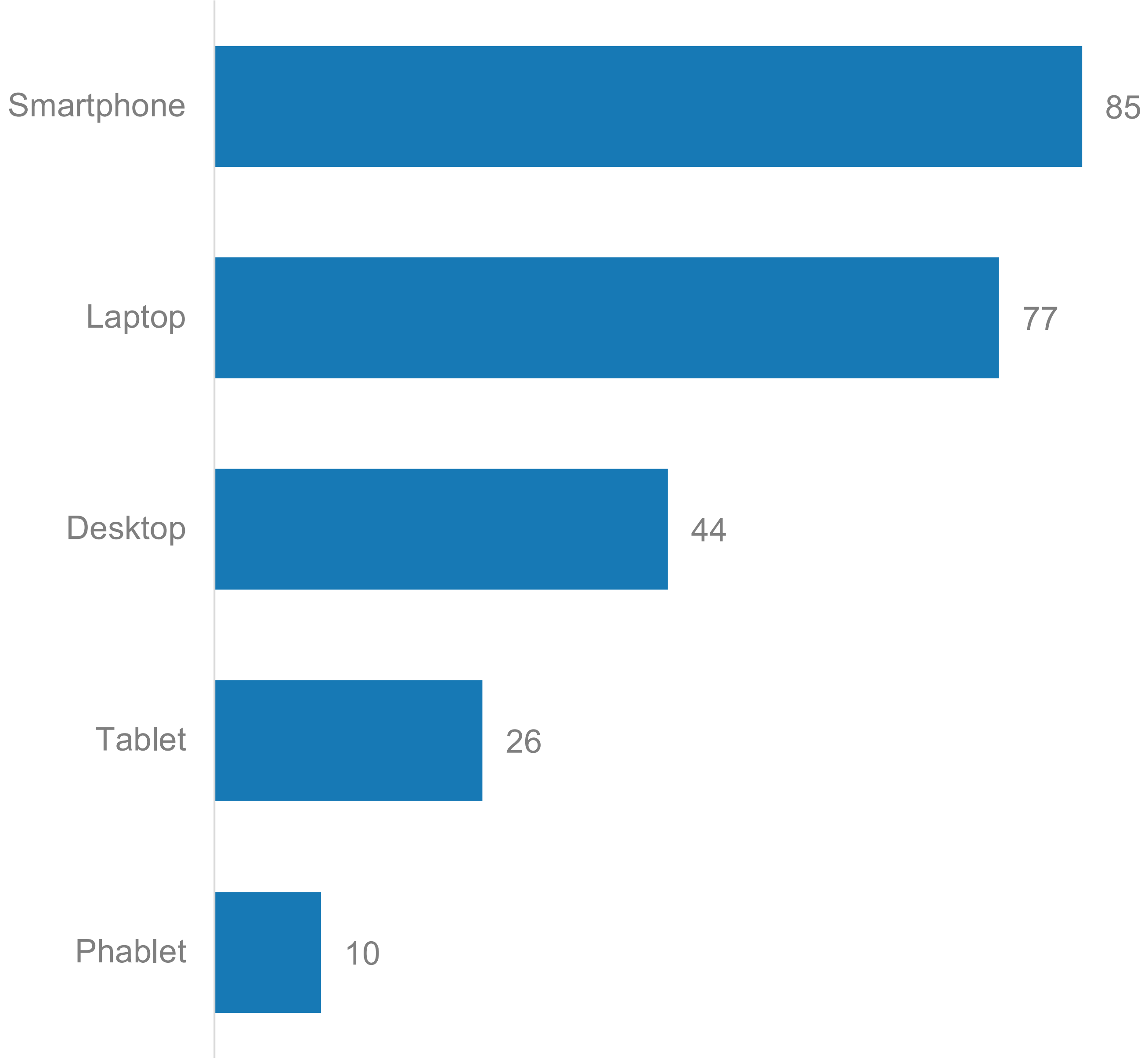
Multiple Answers

General Considerations

Decision cycle



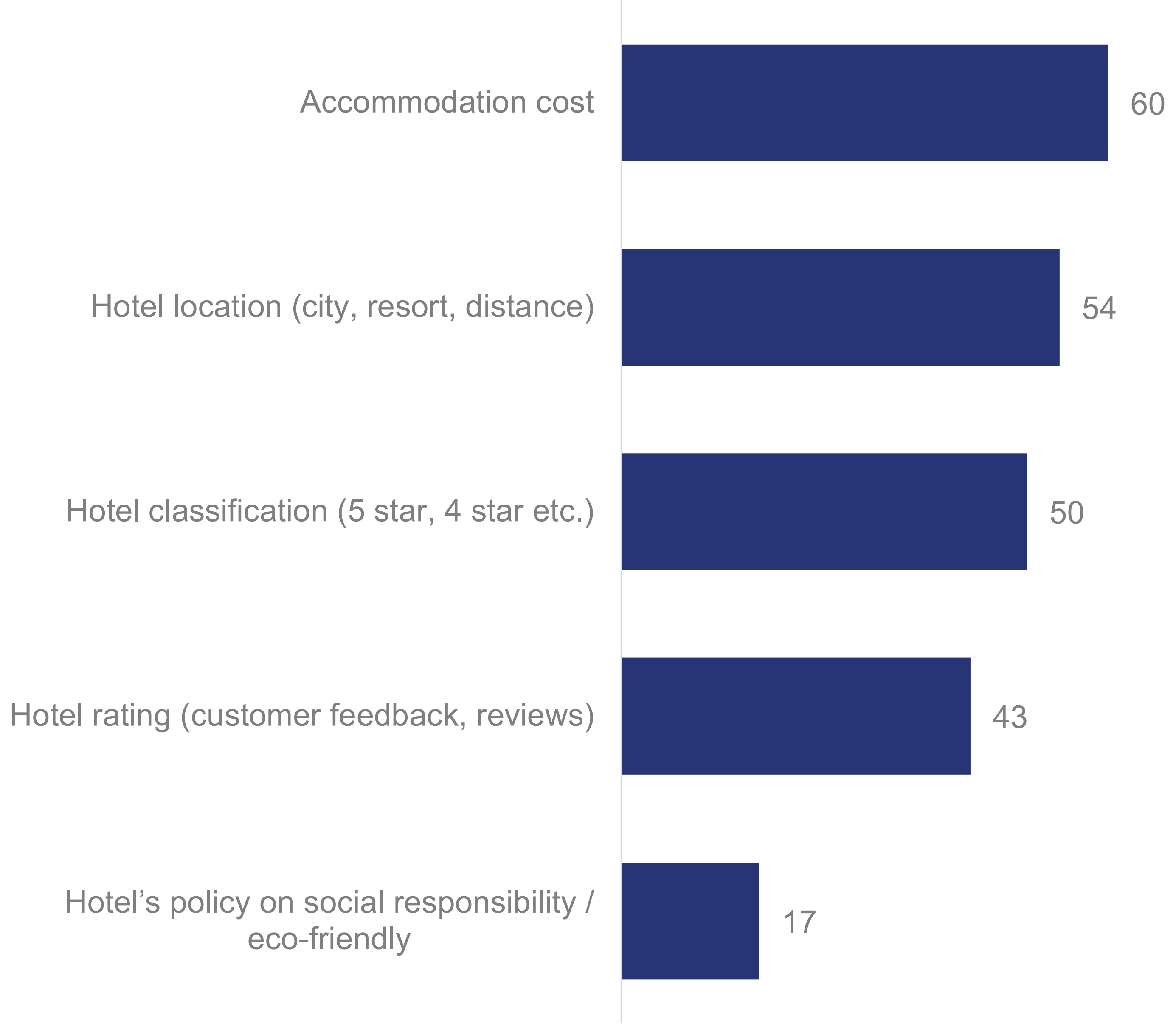
Device used for search

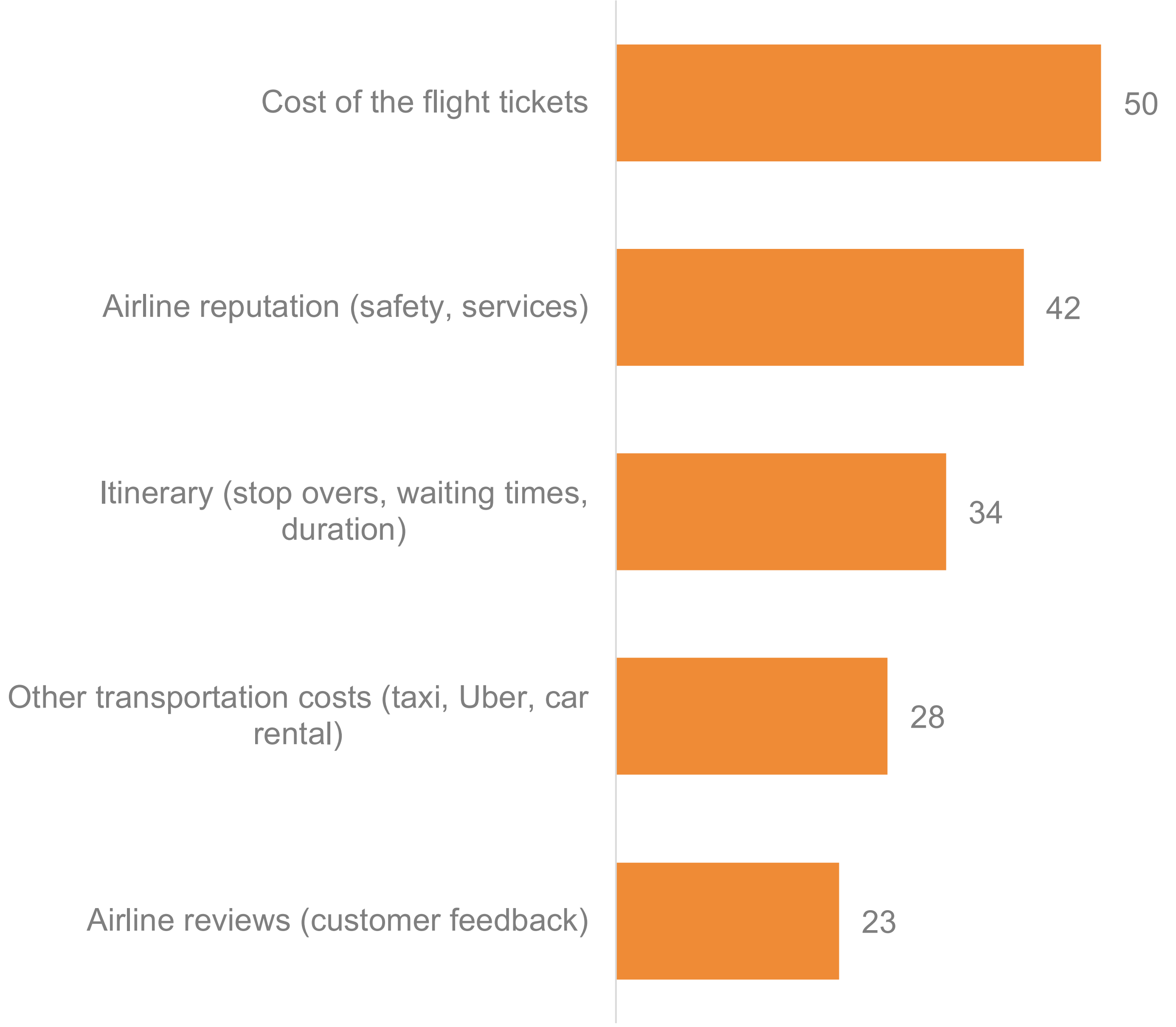


Multiple Answers

Destination Evaluation

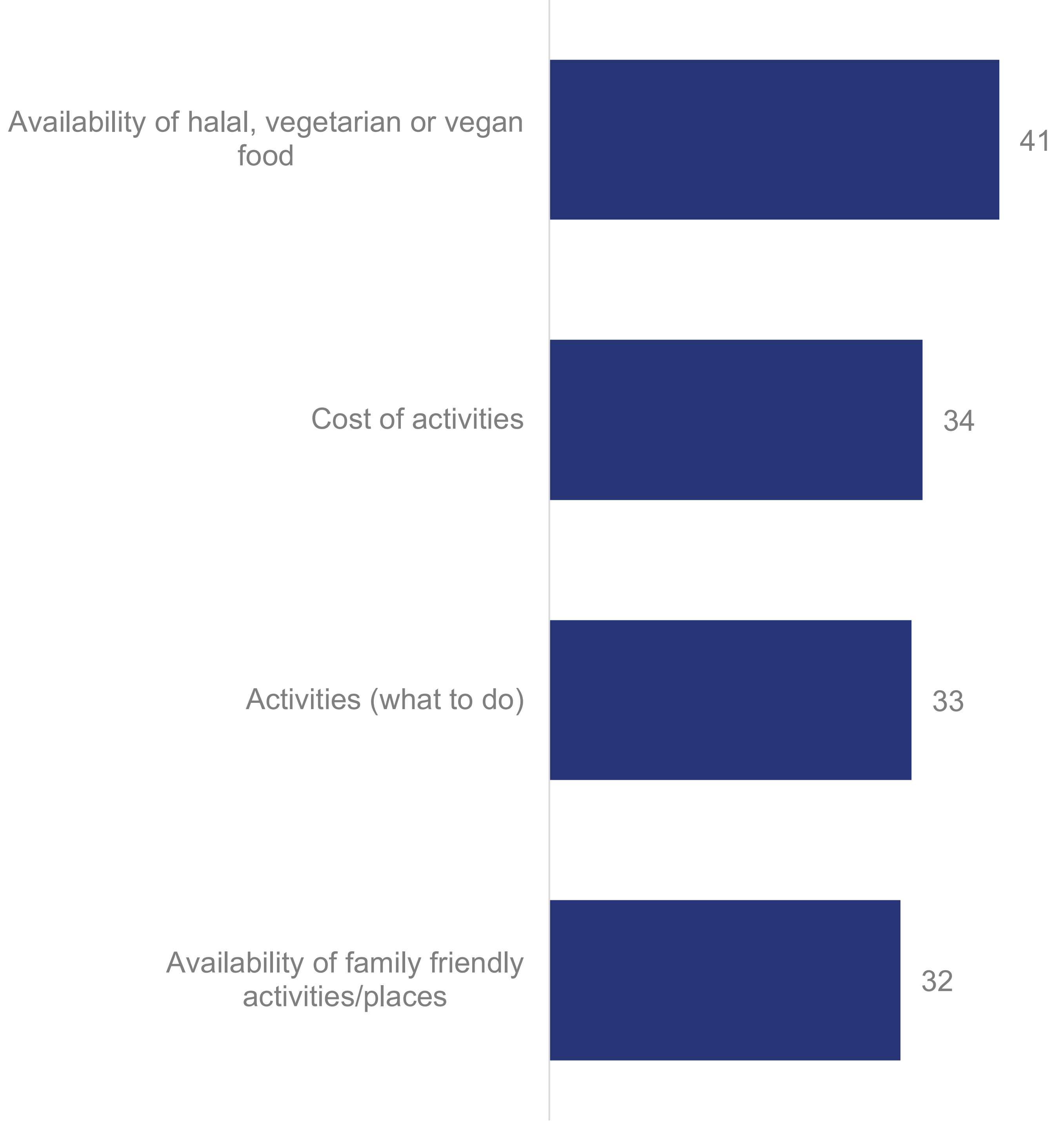
Accommodation	Transportation

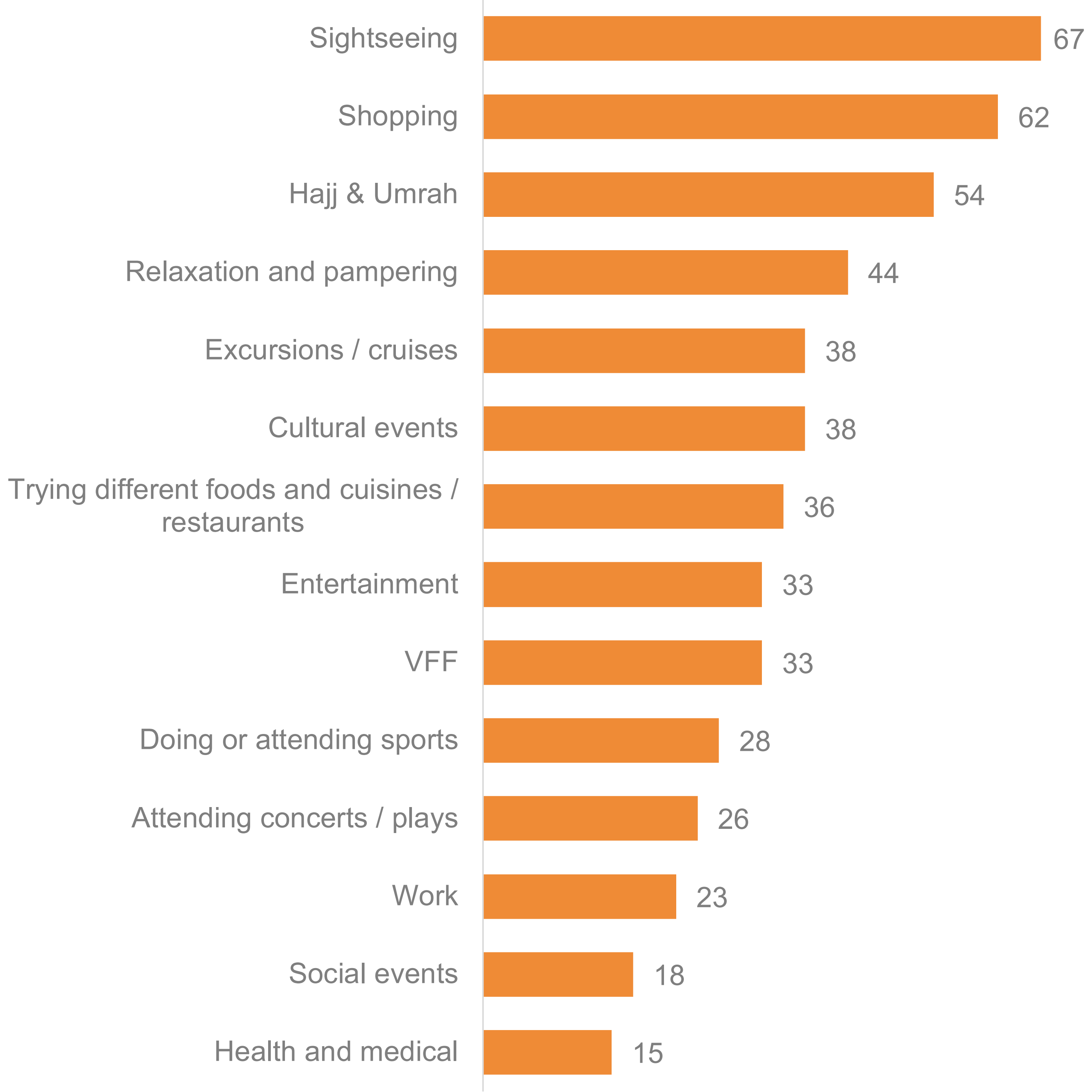




Multiple Answers

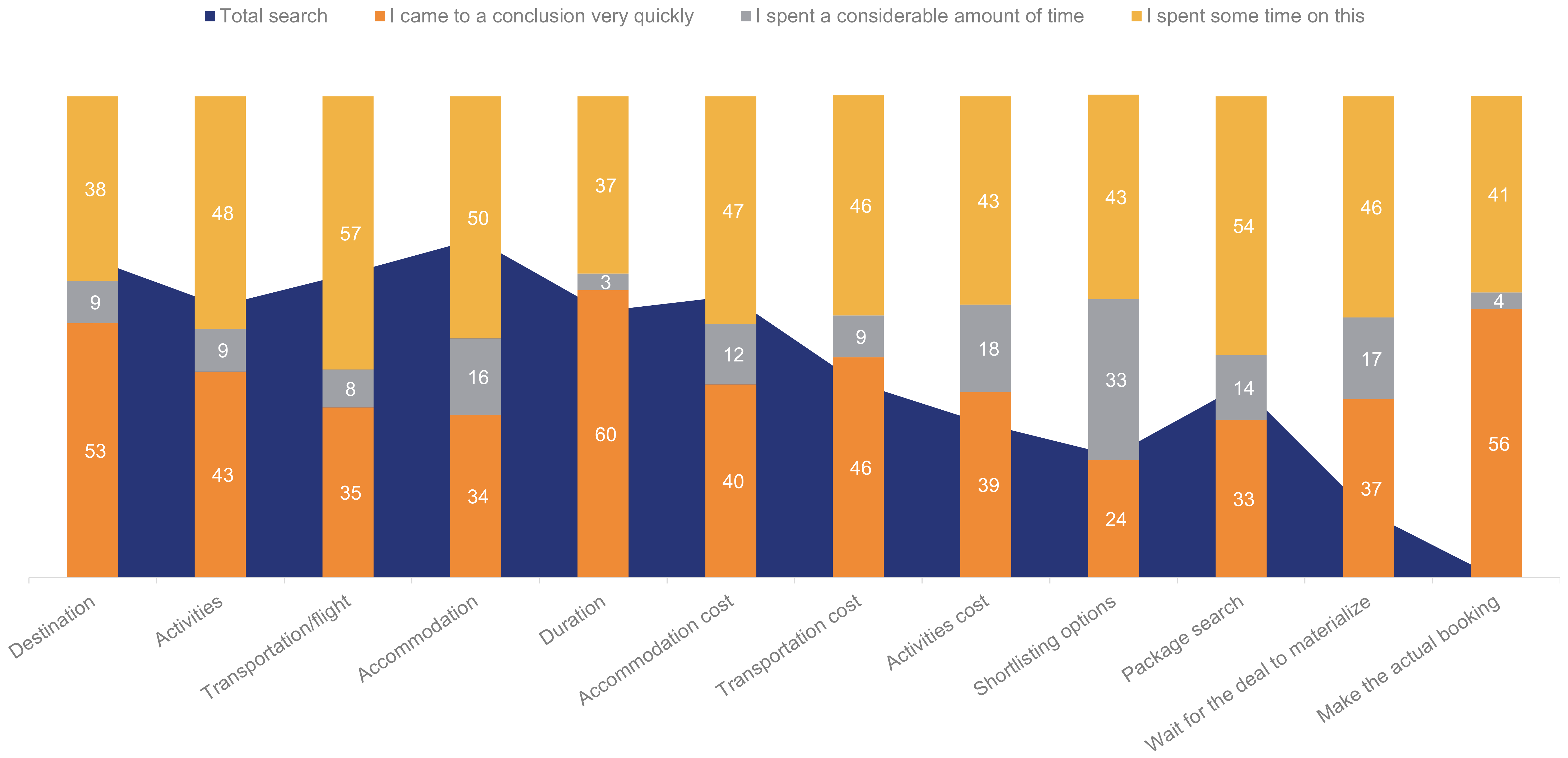
Activities Considerations





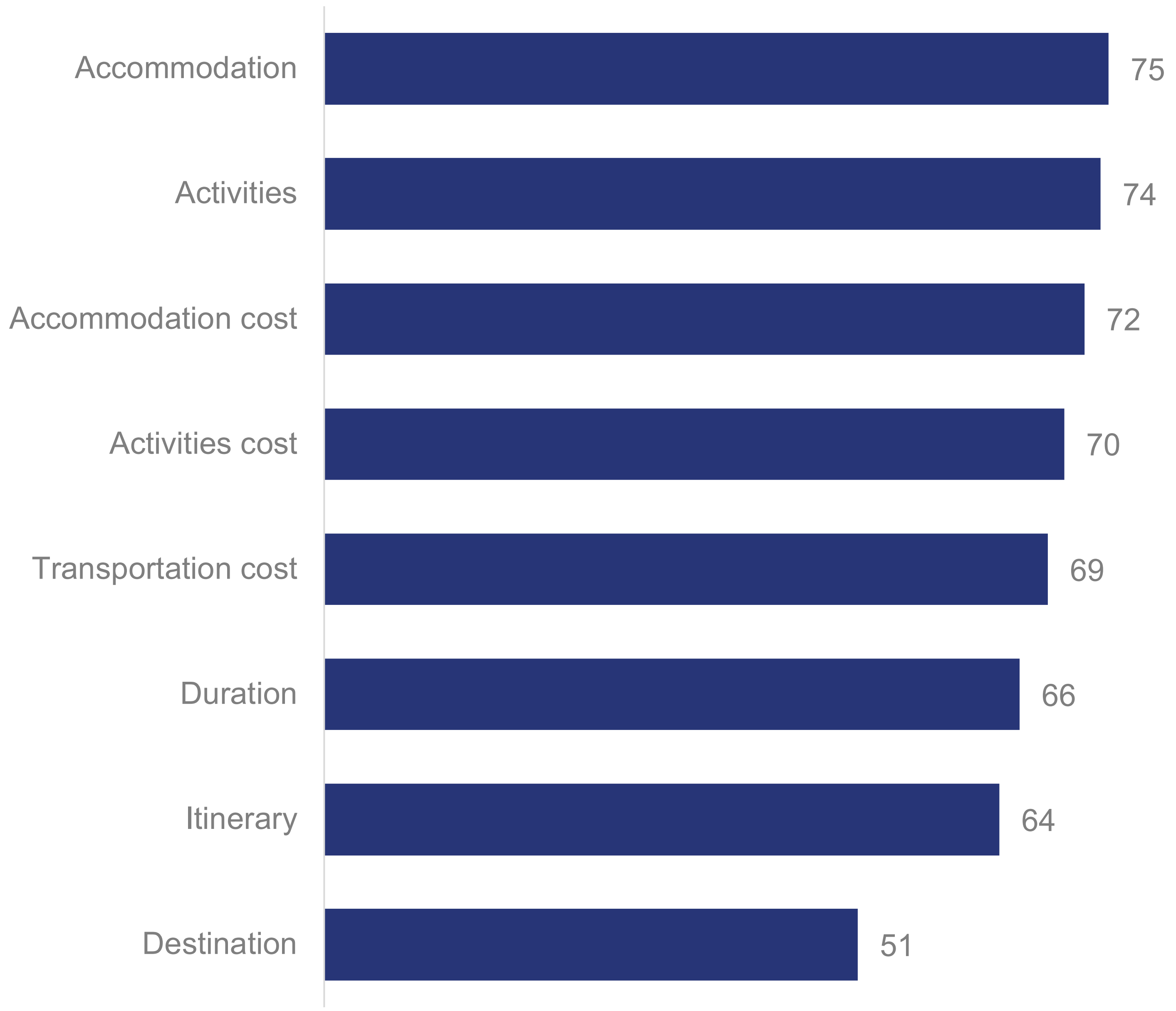
Multiple Answers

Search Cycle vs. Time Spent

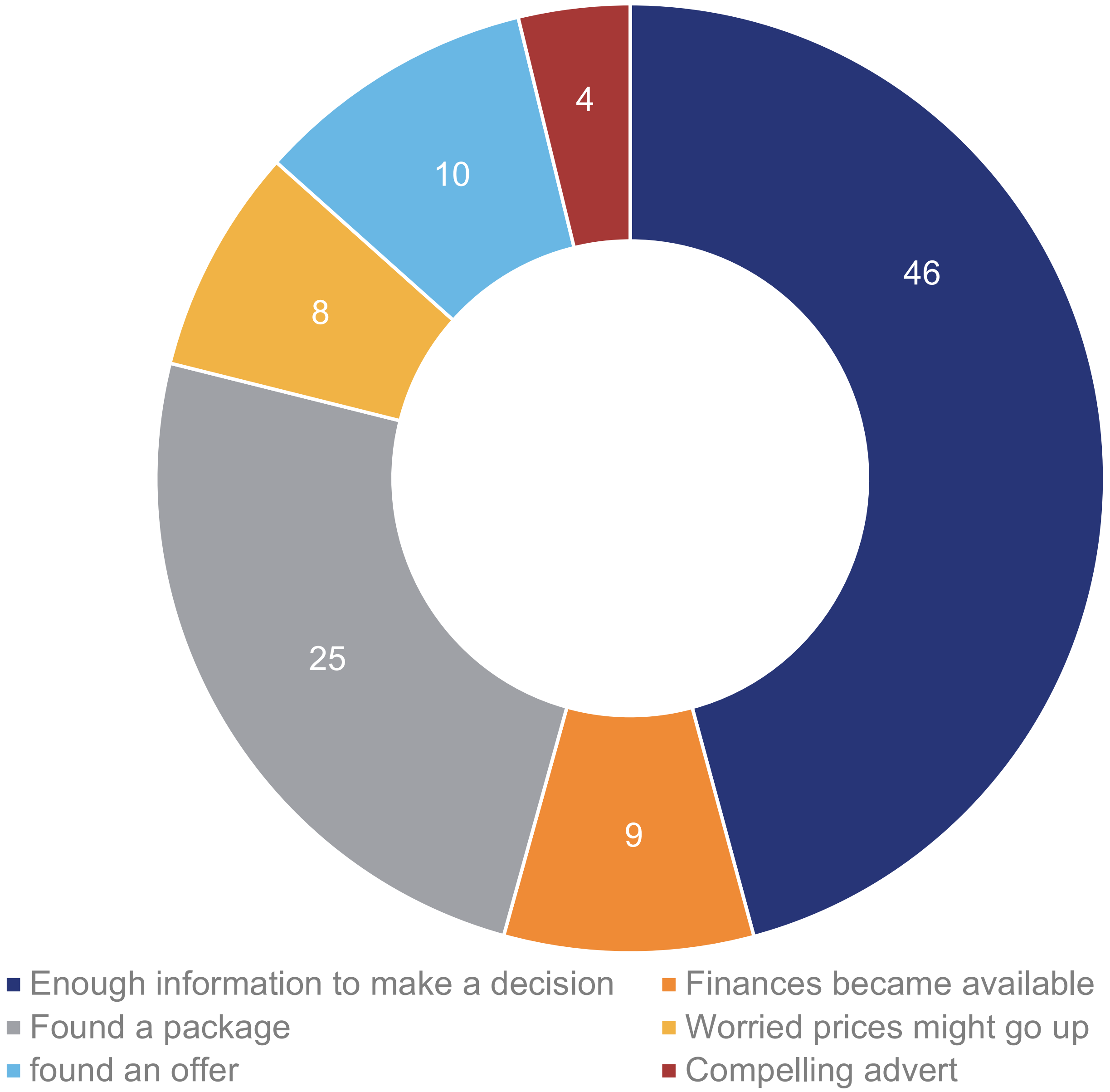


Reconsideration vs. Commitment

Change of mind
(during the process of search)



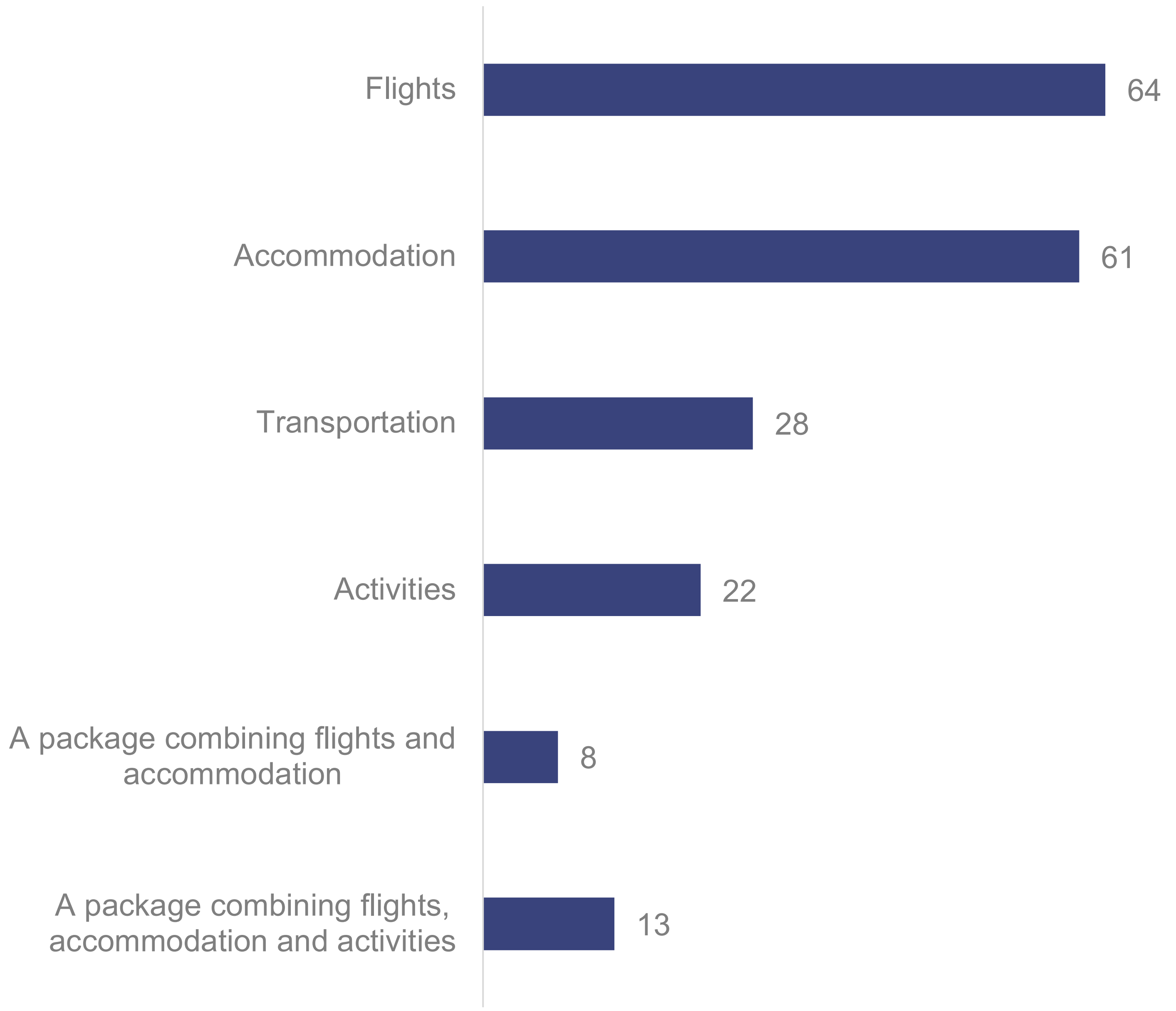
Trigger for making the booking



Multiple Answers

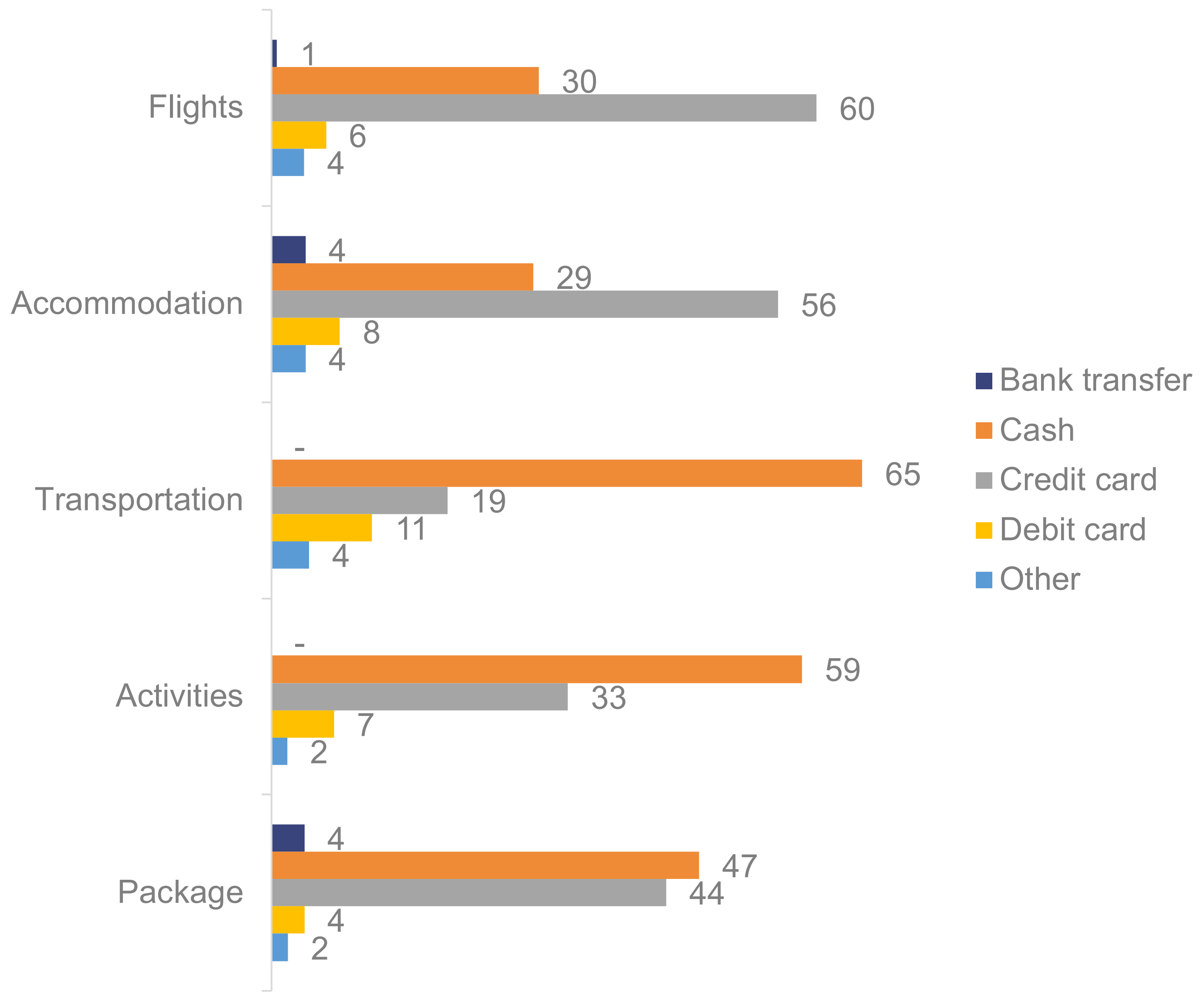
Actual Booking

Element booked



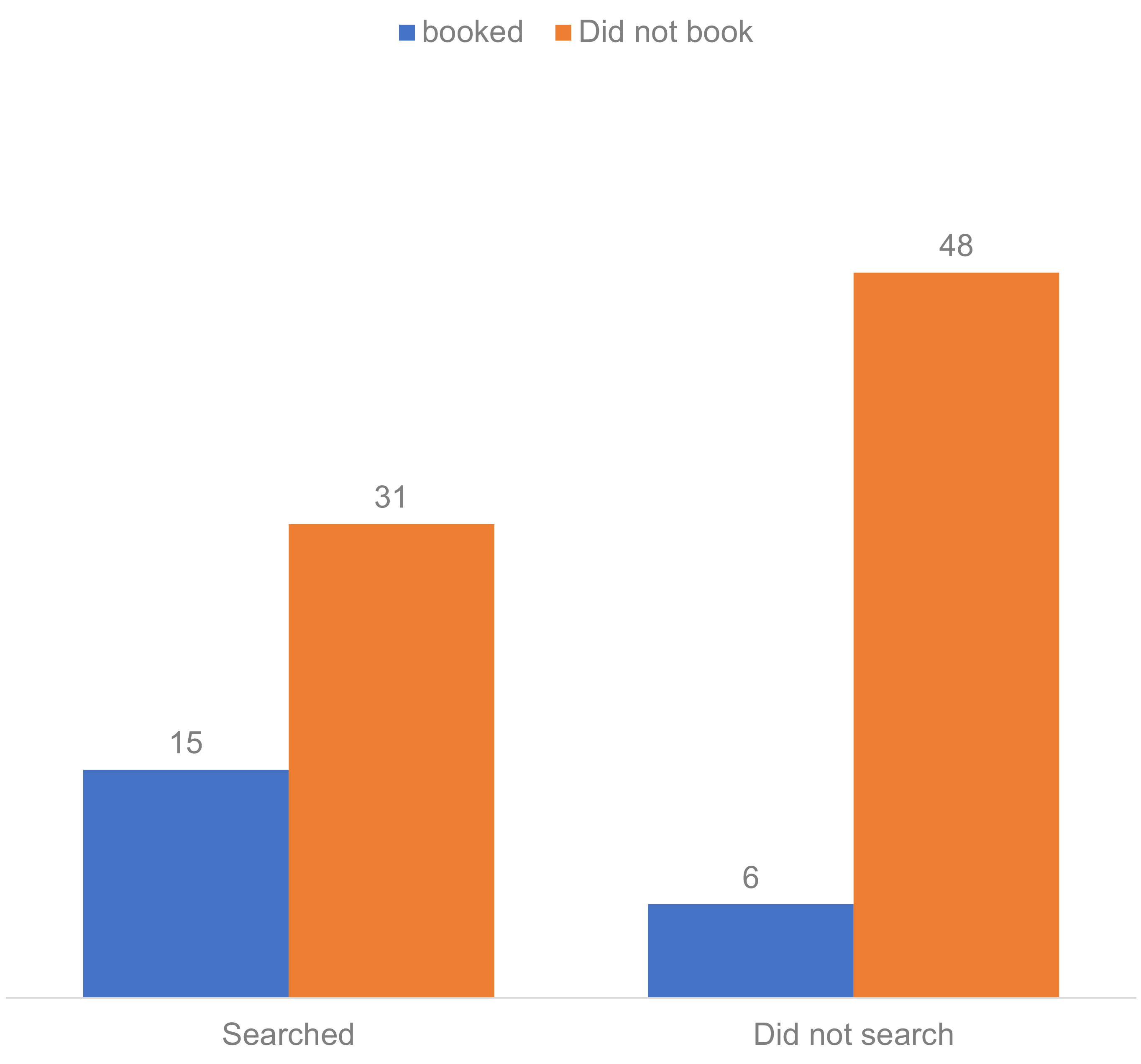
Multiple Answers

Payment method



Package Search vs. Booking

- Only 21% of leisure trips are booked as a package with air and hotel as key components (vs. 26% for the region)
- Pre-defined & restricted leisure packages are what steer 54% of travellers away from booking a package
- Add-on activities are what encouraged 71% of travellers to book
- Sightseeing, shopping and pampering are what most travellers are seeking– in line with region
- Packages booked for Hajj and Umrah is a given for Egyptian travellers



Choosing Packages

… to Package

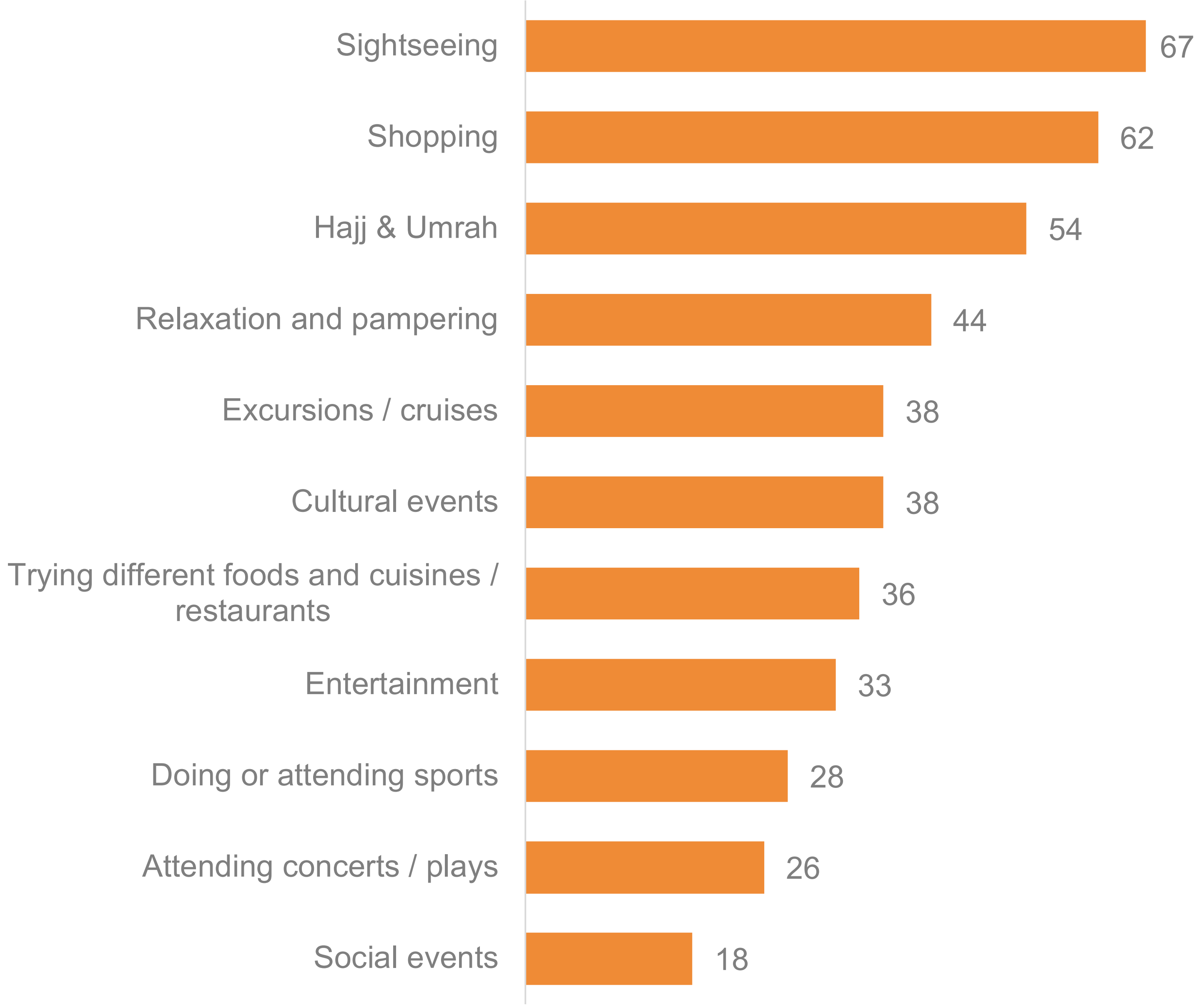
… not to Package

Multiple Answers

Package Components

Components

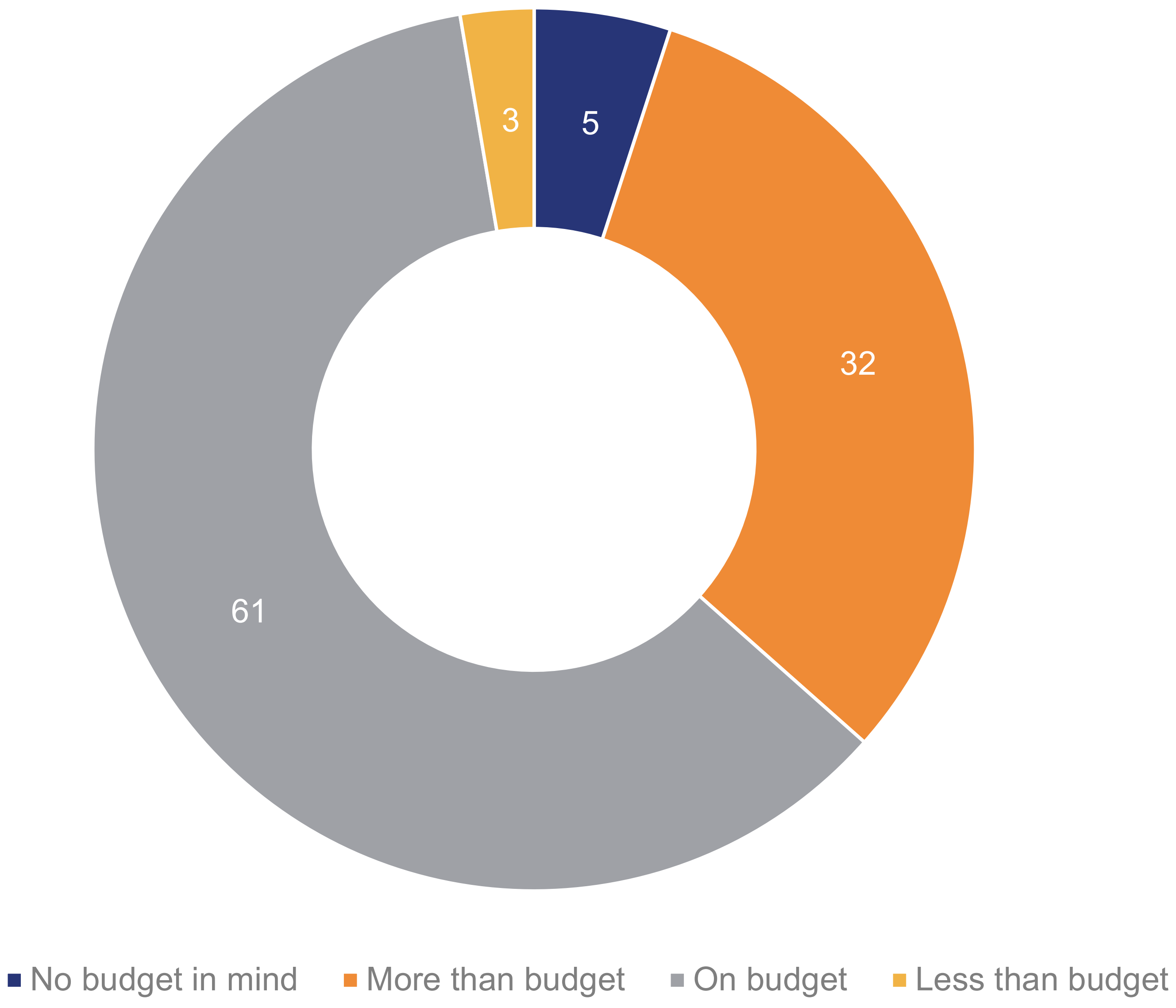
Activities



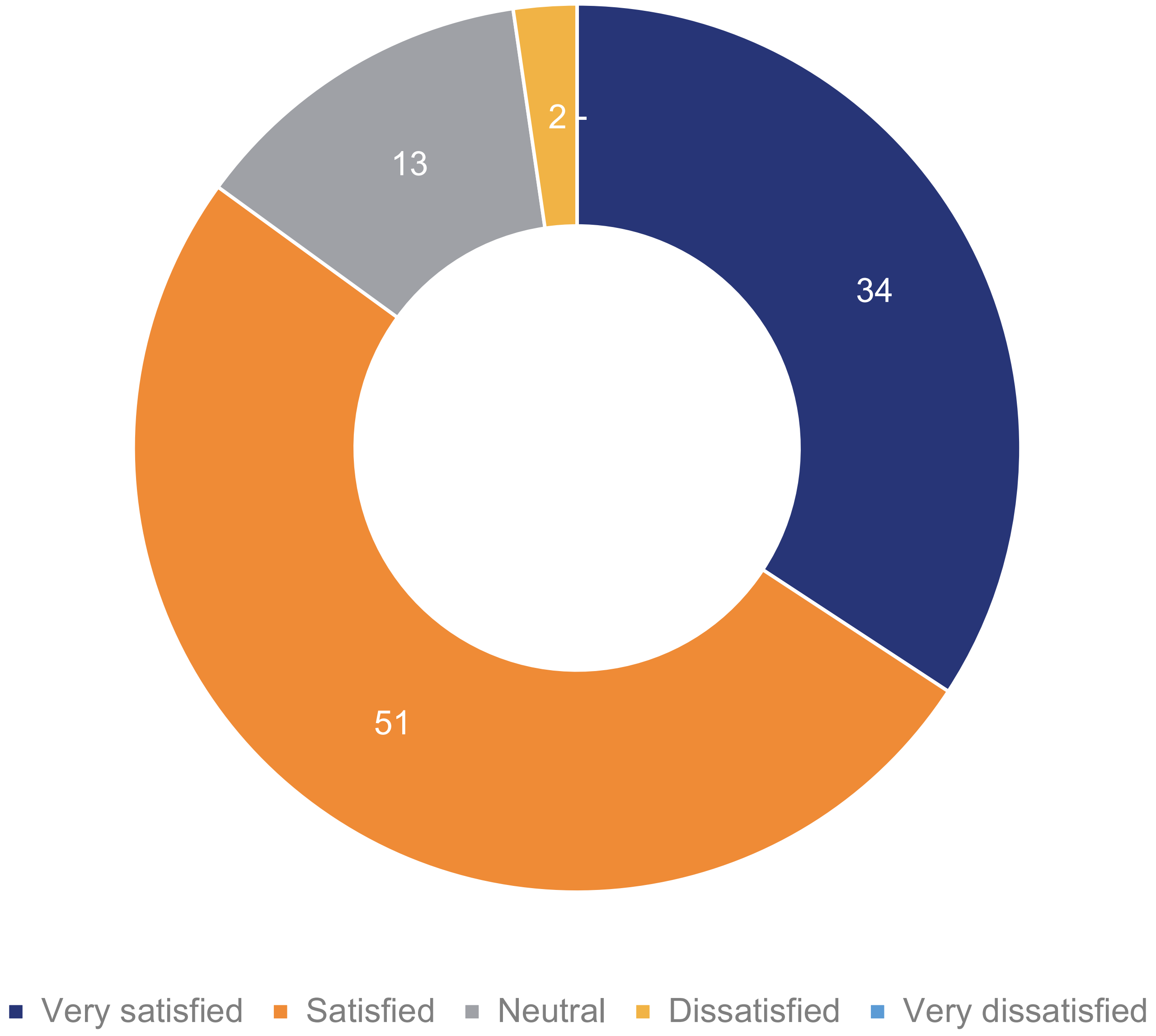
Multiple Answers

Post-Booking

Amount Spent



General Satisfaction with the leisure booking



Experience & Sharing

- 50% (vs. 41% for the overall region) confirm sharing feedback post trip with their FF&C repeating the cycle
- 50% recommend a brand booked on social media (vs. 25% at regional level), while 27% will share negative feedback on social media (vs. 17% at regional level)
- In the event of negative experience, 27% (vs. 15% at a regional level) will speak out on the brand website of the supplier

Multiple Answers

Business Travel

Pattern

How?

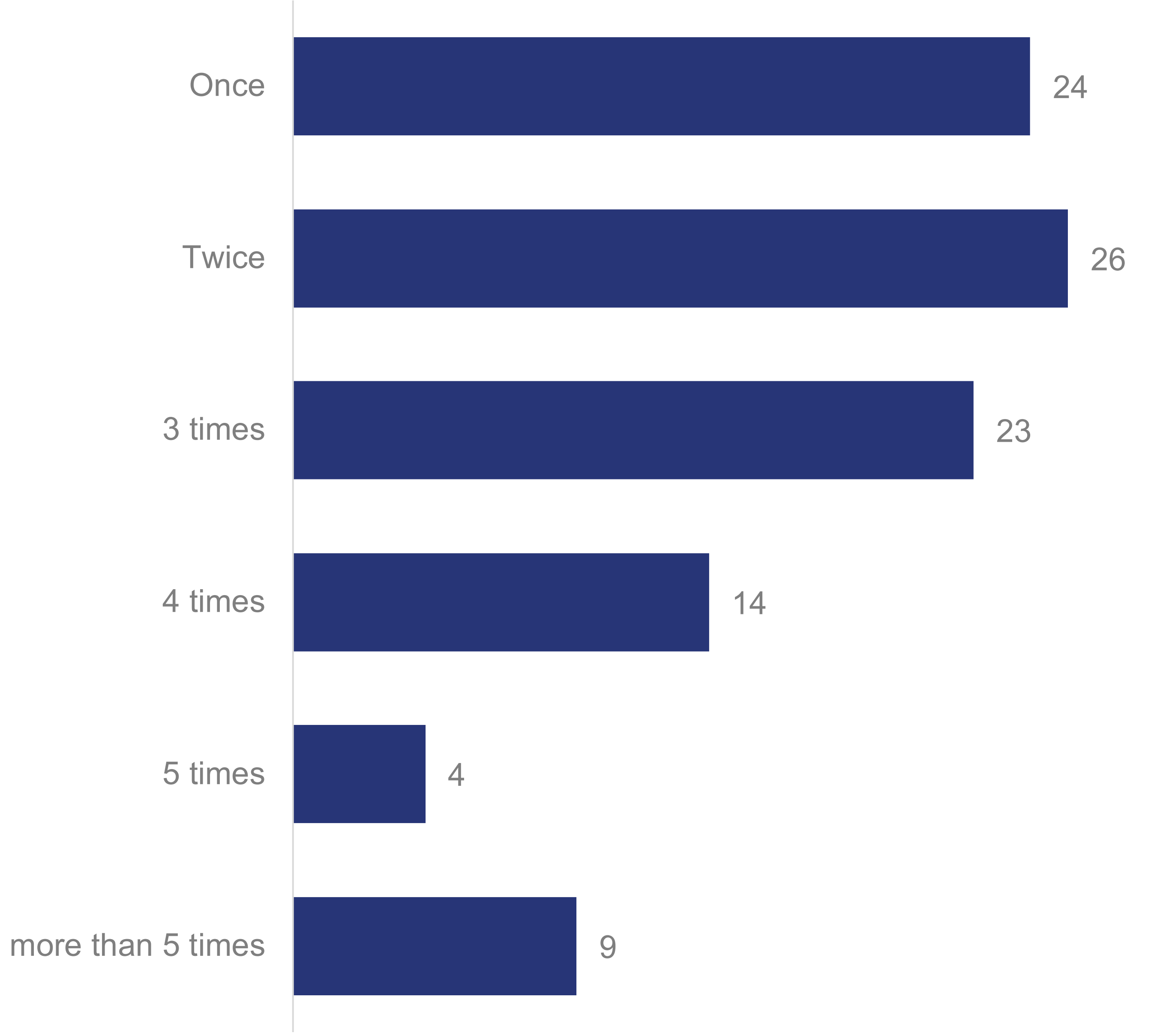
Who?

Highlights Emerging from Study

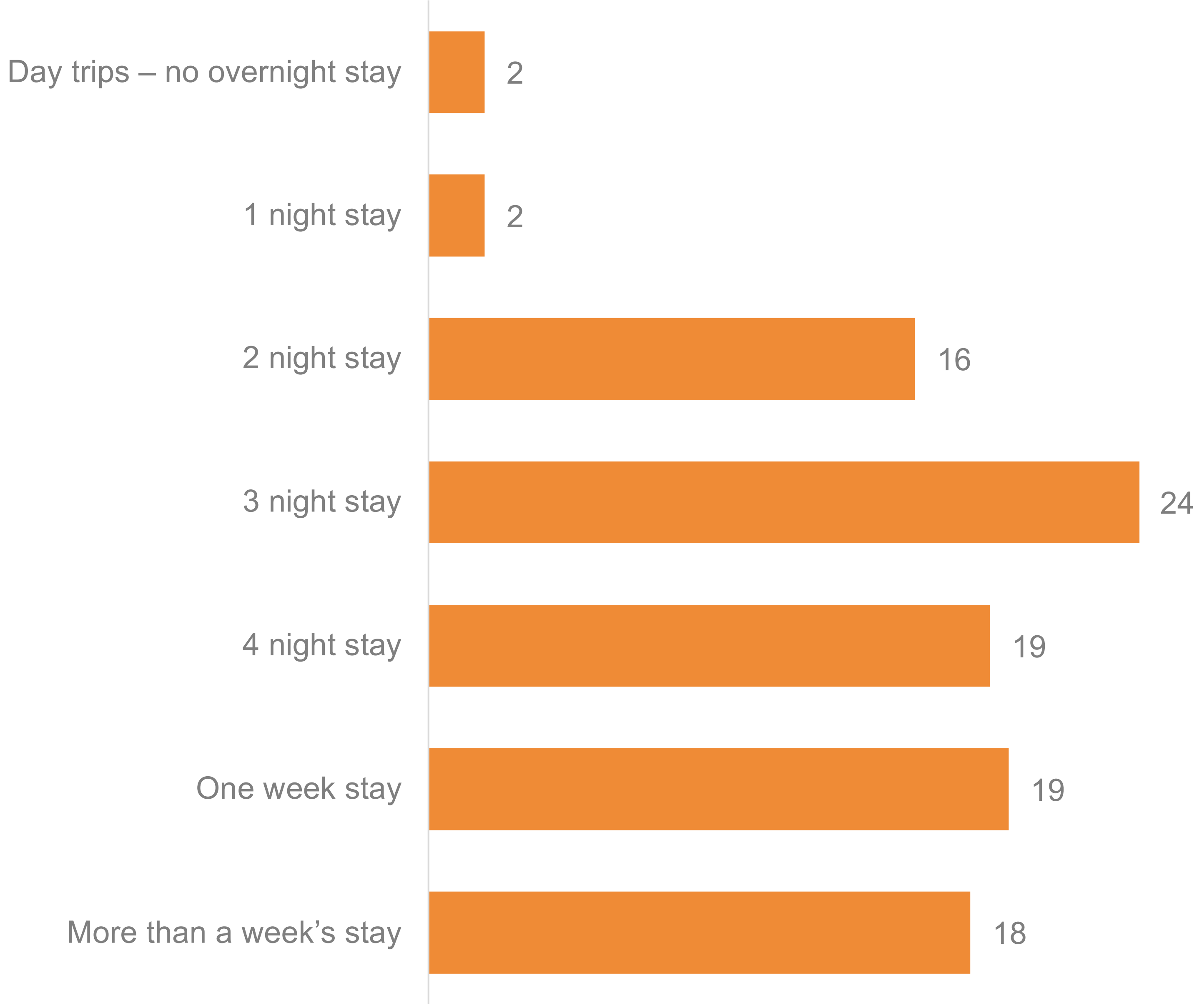
- 63% travel between 2-4 times per year for business with an average length of stay of 3 nights (24% of total travel)
- 56% of business travel has extended length of stay of 4-7 nights
- Online is still key for search at 64% but of less importance for booking (57%)
- 42% of business travel is booked by company and travel agents but 58% is booked by the traveller direct

Business Travel

Frequency

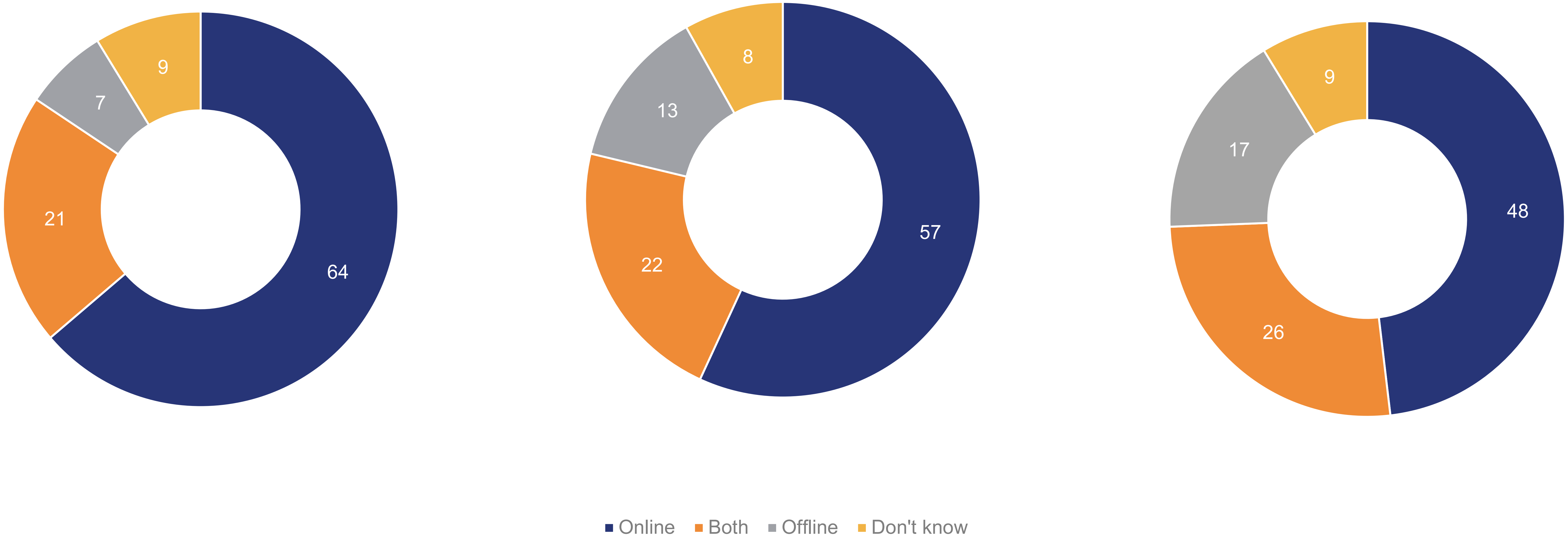


Duration



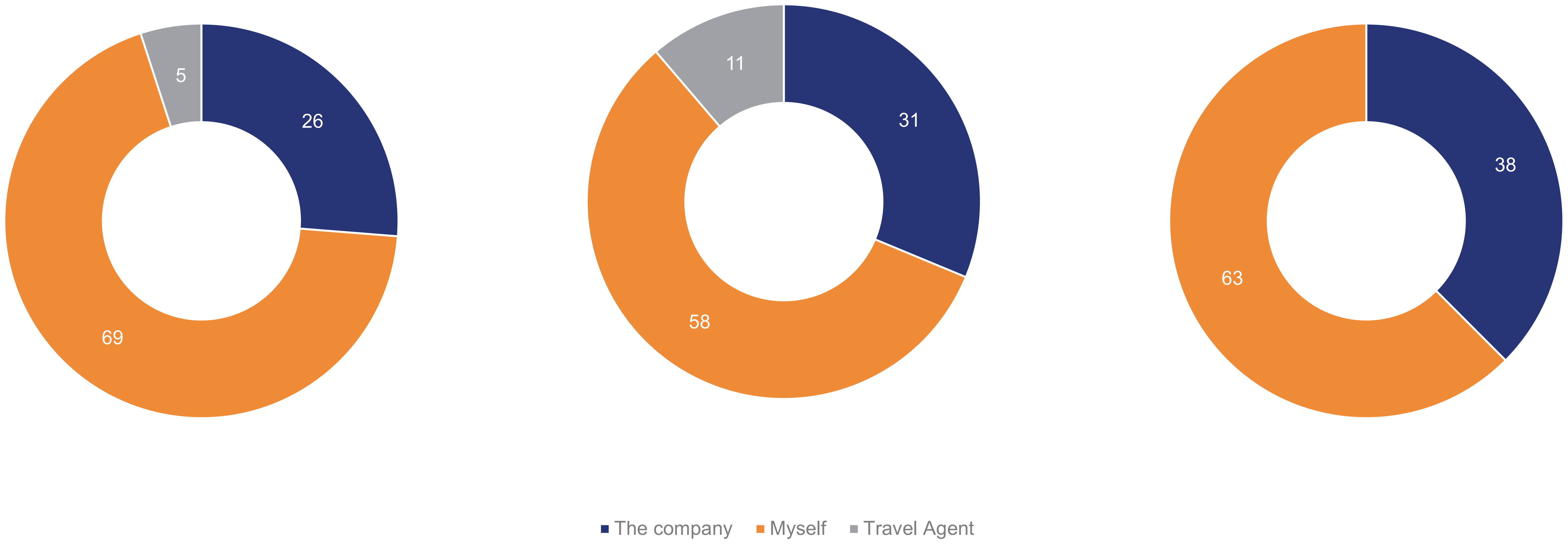
Business Travel… How?

Search | **Book** | **Pay**



Business Travel… Who?

Search | **Book** | **Pay**



GCC

Key Findings

Sub-group specific charts

Key Findings – GCC Overall

- 76% of GCC respondents are between 21 and 40 years old, 73% are married with children
- In Saudi, the most frequent travellers are 30-45 years old, while in Kuwait, the age group is 25-35 years old
- 54% of respondents travelled 3+ times a year however 83% went to international destinations compared to 64% on the regional sample
- 62% mentioned travelling with their family (vs. 57% for the overall region) which implies a small group as confirmed by travel trade interviews; that Arab nationals appreciated travelling as groups of 2 or 3 families
- Due to the high expat population in the Gulf, 26% of total travel is back home

Total Population	**55.2M**
Male : Female	**61:39**
Internet Penetration	**76%**
Mobile Penetration	**77%**
Socio Economic Class (A&B)	**15%**

Source:
Population: UN World Population Prospects: 2017 Revision
Internet: Internet World Stats 2017
Mobile: GSM Association 2016
SEC: Euro monitor National Statistics 2017 (Exc Oman)

Key Findings – GCC Overall

- 83% travel internationally vs. 64% for the region driven by nationals who are the most frequent travellers in the GCC (34% travelling 5+ times a year) and the ones travelling the most internationally with 74% of respondents
- Trade interviews confirmed a rise in short trips by Saudis (age 30-40 years)
- Arab Expats pay much more attention to FF&C feedback and recommendations (53%) than the other sub-groups (38% for GCC Nationals for example)
- From focus groups discussions we learned that nationals have limited trust in online ratings and general information. They tend to trust other sites more from a content point of view: Booking.com & Mosafer were mentioned. They tend to believe information is biased. UAE Nationals interviewed actually confessed to trusting only the reviews of Saudi travellers
- The Top-of-Mind travel sites used for searching and booking are highly influenced by the language spoken by the respondents and region of origin
- Wego for example which focused on Arabic content and campaigns ranks #3 for GCC Nationals and Arab Expats on the booking sites. Similar situation for MakeMyTrip (#1 top of mind awareness for India Sub-continent Expats, and #2 for booking) and Cleartrip (#4 of the used sites) both headquartered in India have a success

Key Findings – GCC Overall

- The Travel Agents used for booking are also influenced by the nationality and country of residence of the expats
- For Social media and other traditional media influence, focus group discussion respondents highlighted the below:
  - GCC Nationals: Instagram, SnapChat, Twitter, well-known websites such as "Arab Travellers" and "Al Rahhala" and few bloggers. TV programs (documentaries) on Al Jazeera, ART and Discovery. Few admitted following Agent e-mails such as Groupon and Cobone
  - GCC Western & Others and Indian Subcontinent Expats mentioned Facebook, Instagram, YouTube and Radio
- The Decision process differs per Sub-group:
  - Ladies are taking the lead in the GCC Nationals group: 63% of the female group respondents are the sole decision makers
  - Ladies are also taking the lead in the Western & Other Expats group since 55% of the female group respondents are the sole decision maker
  - In GCC Indian subcontinent expat group, the decision is actually shared: 63% of the female respondents decided with others and 57% of the male respondents decided with others
  - Gents are taking the lead in the Arab Expats group since 59% of the male group respondents are the sole decision makers

Key Findings – GCC Overall

- This was aligned and confirmed during focus group discussions: Gents decide on budget but ladies do the research and convince their husband or decide on the destination, itinerary and activities
- Budget in general comes later in the decision process for Western / Other Expats and GCC Nationals than for Arab and Indian Subcontinent Expats
- Surprisingly if this reflects in the evaluation of the Accommodation there are some variations for Western & Others subgroup for the evaluation of Activities and Flights since respondents seem to focus on the cost attached to these verticals in a higher proportion

" My husband and I decide together where and what we want to do.

He has to define the budget for the trip but then trust my selection"

Saudi Lady Respondent
Focus Group

Key Findings – GCC Overall

Accommodation preference will vary between sub-groups:

- GCC Nationals are mainly booking 4- or 5-star hotels especially for family trips abroad (it can be a 3-star for a domestic trip and a motel for a friends break). There is a rise in demand for villas and apartments often booked via Booking.com
- Hotel classification or branding is also key for GCC Nationals. They will look at reviews and pictures from Booking.com and Mosafer and book there since they also trust their online reviews and payment is upon checkout from the hotel offering increased flexibility for changing or cancelling reservation. Location is also important but more from a safety point of view
- GCC Arab Expats are cautious about the choice of the hotel and its location (41%) and classification (41%). Once married, they travel with family in “safe” places i.e. in line with their traditions. It results in a choice of 4 and 5-star branded hotels such as Hilton or Intercontinental. The criteria they look for is WIFI, children’s facilities, cleanliness, laundry and pool and would certainly avoid clubs and bars
- In GCC Western/Other Expats subgroup, Europeans are quite adventurous and have no issues booking a 3 or 4-star property for short trips. They place the experience over the comfort (no issue camping). They will choose branded hotels to use awarded points during business trips. Otherwise, the decision is based on location mainly (47%). Alternatively to hotels, if they travel with friends they might look at villas and apartments

Key Findings – GCC Overall

- For choice of flights, they all look at cost and wouldn't mind flying Low Cost, however Westerns & Other Expats are cautious of the itinerary (45% vs. 29% for the overall sample)
- Activities and specifically Family friendly activities are a key concern for Western & Others Expats group
- During Focus group discussions, it appeared the GCC Arab expats would be delighted to have Arab tour guides. They would also book activities online
- Availability of Halal or Vegetarian / Vegan food is considered by 31% of the Arab Expats, 28% of the GCC Nationals and 26% of the Indian Subcontinent Expats
- From an activity perspective, it is quite diverse depending on the subgroup:
  - Shopping leads for 70% of the GCC Nationals mentioning it vs. 17 of the Western & Other Expats group
  - Western & Other Expats rank sightseeing in the first position with 61% of respondents listing it
  - Arab Expats 67% highlighted sightseeing followed by Excursions and Cruises (56%)
  - Indian Subcontinent Expats prefer site-seeing too (63%) however rank Shopping as number 2 with 56% of respondents highlighting it
- The Search Cycle vs. Time spent differs a lot per Subgroup. GCC Indian Subcontinent and Western & Other Expats take a lot of time looking for options on all components of the trip compared to GCC Nationals and Arab Expats

Key Findings – GCC Overall

- Payment by Credit card is not an issue for any of the subgroups
- Packages still struggle to find the right audience and it seems vendors and respondents needs are disconnected: 55% of the GCC National group feel packages included too many items, while 53% of the Western & Others expats felt that the price wasn't sufficiently enticing
- GCC Arab Expats and GCC Nationals look at Packages when traveling on an itinerary or for the first time in a destination as a safe and convenient approach especially from a budget point of view (can contain the budget with pre-booked activities), as per focus group discussions. They would be encouraged to book packages if given significant discounts
- The need for customization is required when traveling as a group of relatives as packages sometimes appear too complicated to suit to their needs

"We, Arabs, like to have offers, we like coupons and discounts"

Focus group respondent

Key Findings – GCC Overall

- From a Journey point of view, when not limited by Visa regulations, they all tend to book last minute:
  - GCC Nationals are known for their walk-in approach with Hotels on extended weekends (Saudi Domestic, Bahrain, Qatar, UAE destinations). A Saudi domestic trip might be booked 2-5 days prior (except Umrah or Hajj). International trips, can some times be booked 3 weeks in advance however in most cases it is about 1.5 weeks prior to departure
  - GCC Arab expats require a bit longer generally influenced by the visas. 4 to 1 months prior for a long trip, or 1 week for short trips
  - In general, and more specifically for GCC Nationals and Arab Expats family vacations require planning. When travelling with friends, there can be much more improvisation and a feeling of freedom overtakes the need for planning
  - GCC Indian subcontinent expats will require a longer lead time (3 months ahead for long trip) depending on the visa requirements
  - GCC Western & Other Expats are not so homogenous depending on visa requirements. That being said, the lead time prior to departure for a couple of Westerns travelling to Indian Ocean can be 3 days. For longer trips involving a multi-city tour it can take much longer as they like planning

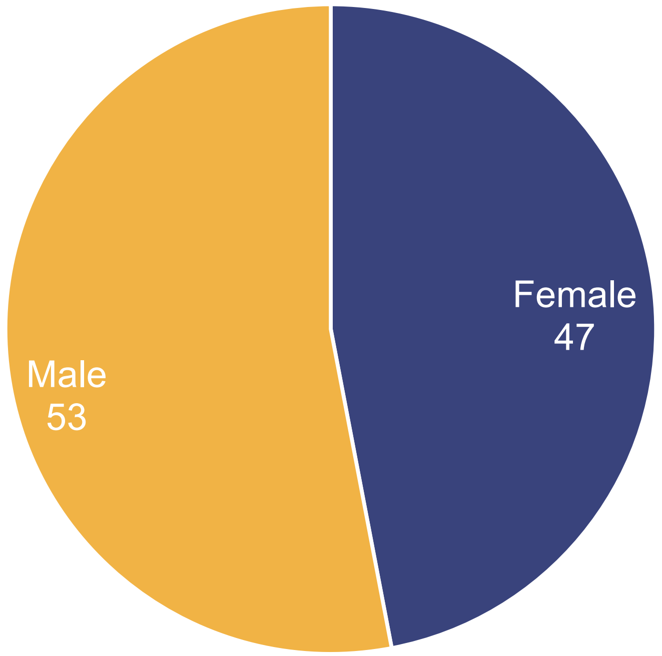
Key Findings – GCC Overall

- In regards to the sharing phase, they will share on similar channels that were visited in the inspiration phase for social media:
  - For GCC National, Instagram, SnapChat, and Twitter lead
  - For the GCC Western & Indian Subcontinent Expats, the highlighted social media were Facebook & Instagram

> "If they request and I am really happy with services, I do it and will share or write a review"
>
> GCC Western/Indian Continent Focus Group

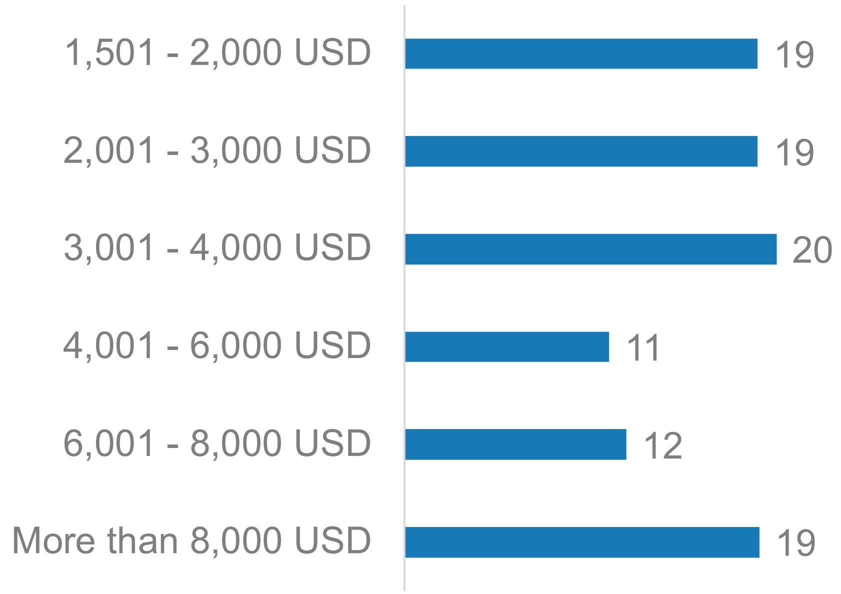
Sample Composition

Gender

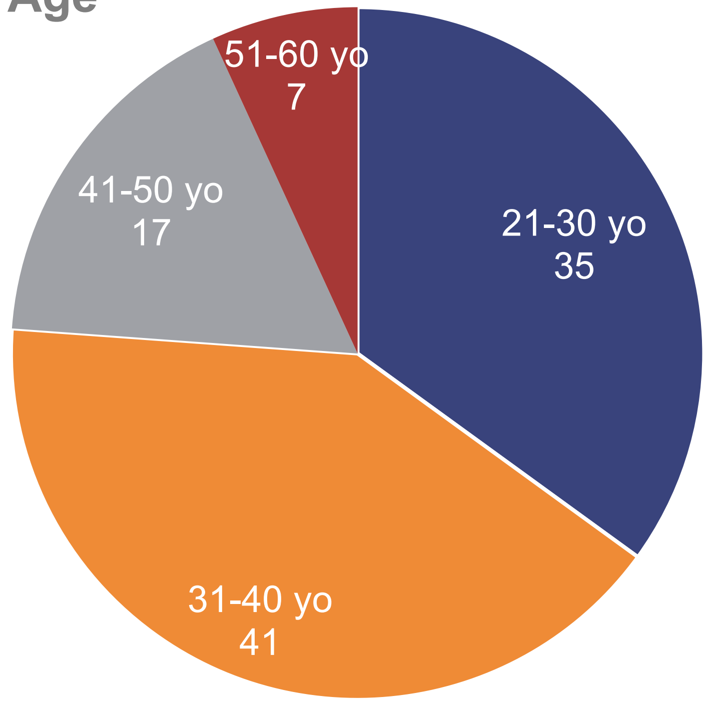


76% of the respondents are between 21 and 40 years old,
73% are Married with children.

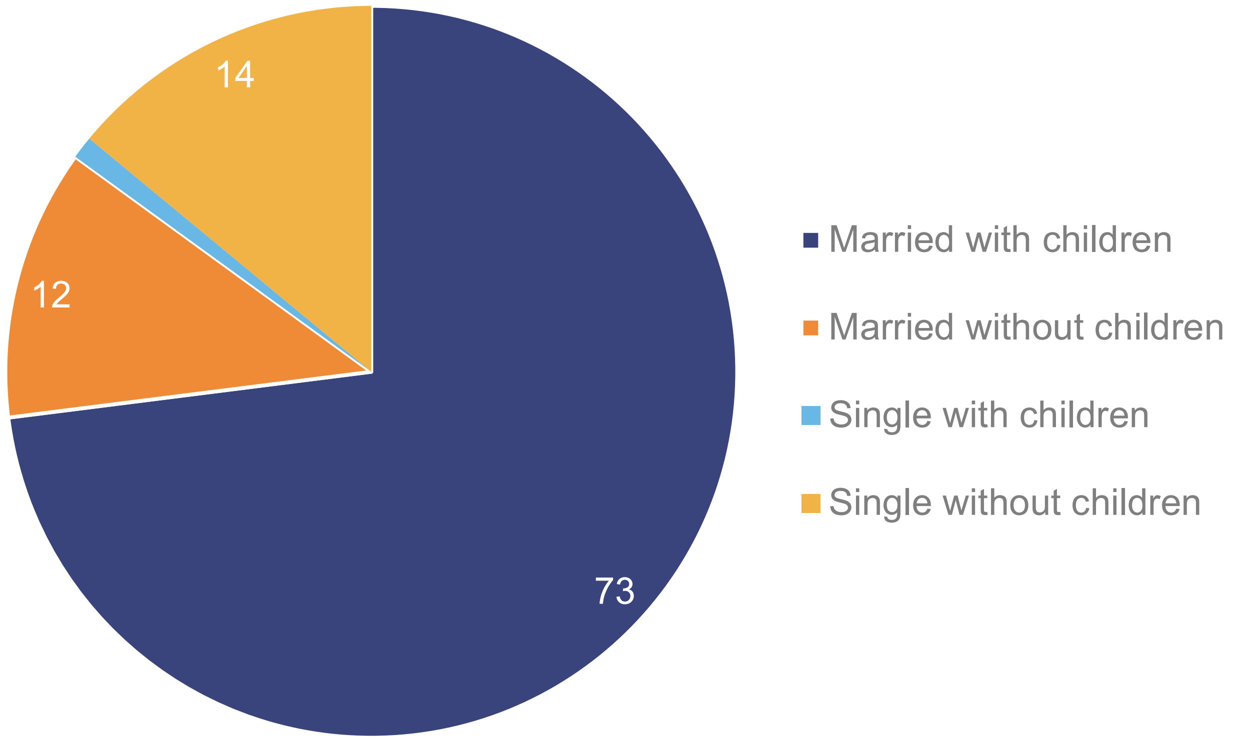
HH Monthly Income



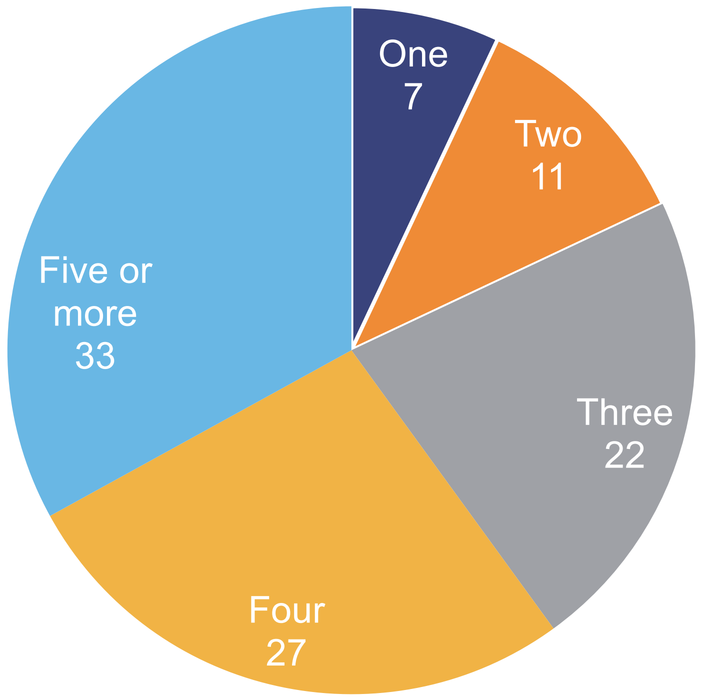
Age



Marital Status



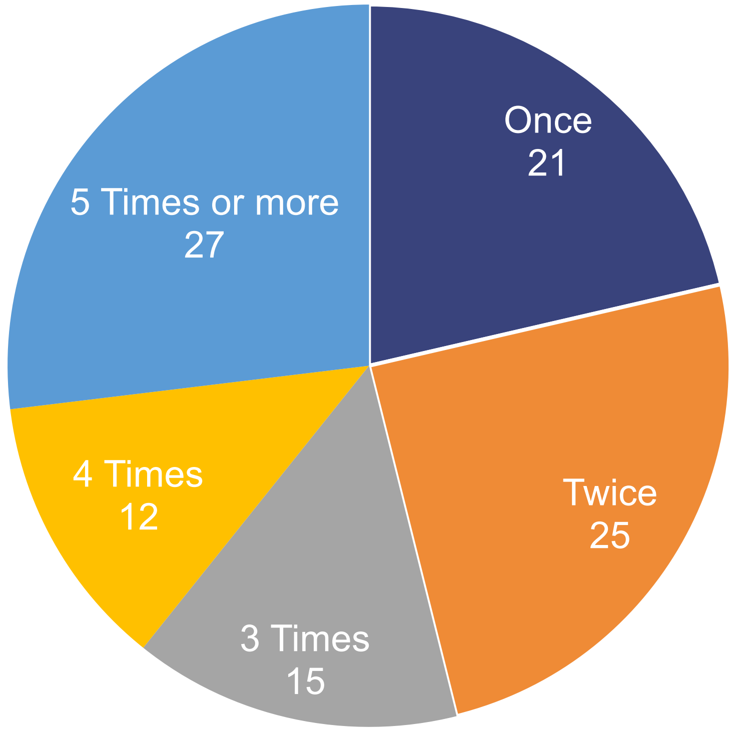
Household size



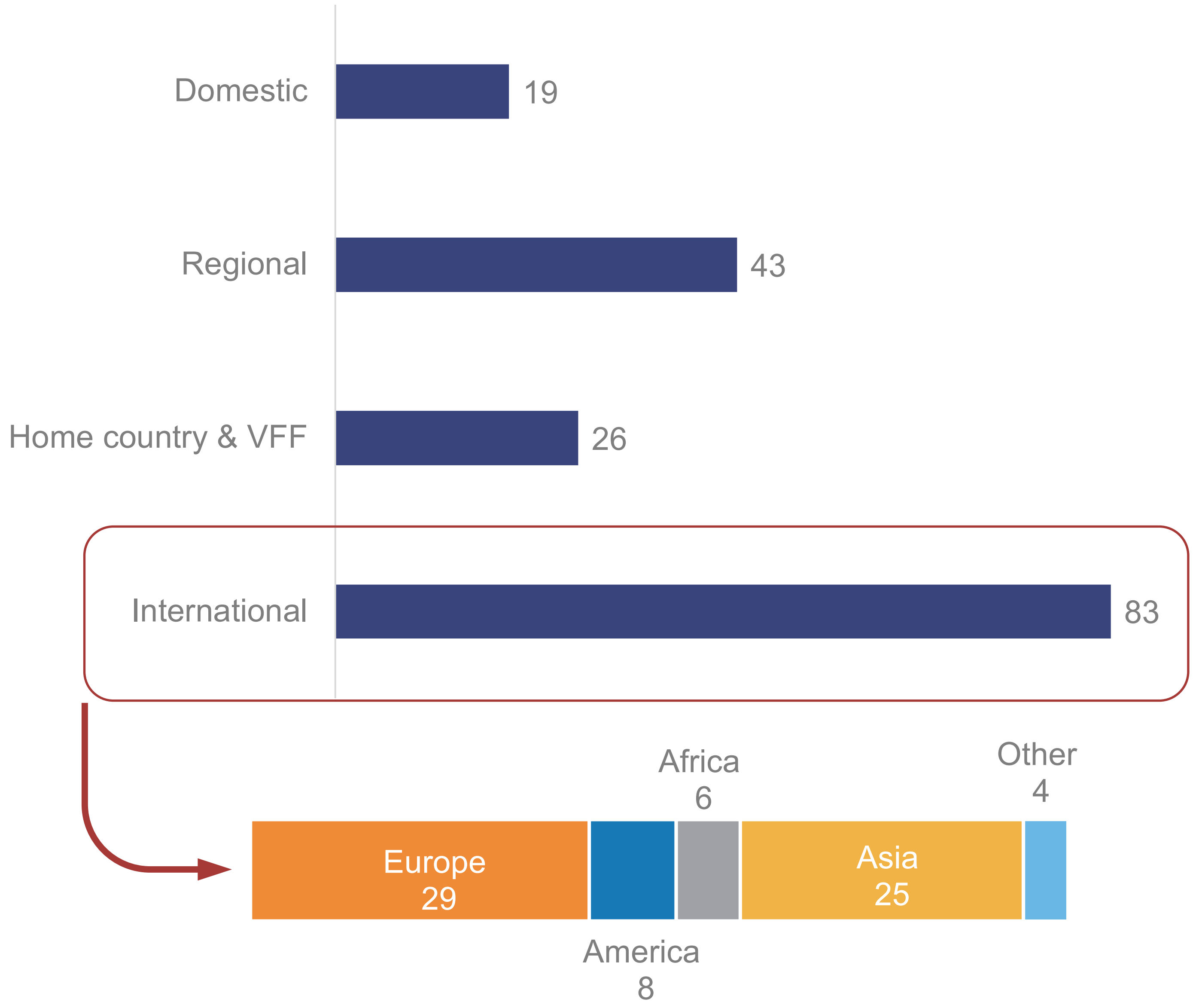
Travel

Frequent with 54% traveling 3 times +.
Social with 62% travelling with family and friends
Global with 83% travelling internationally

Frequency

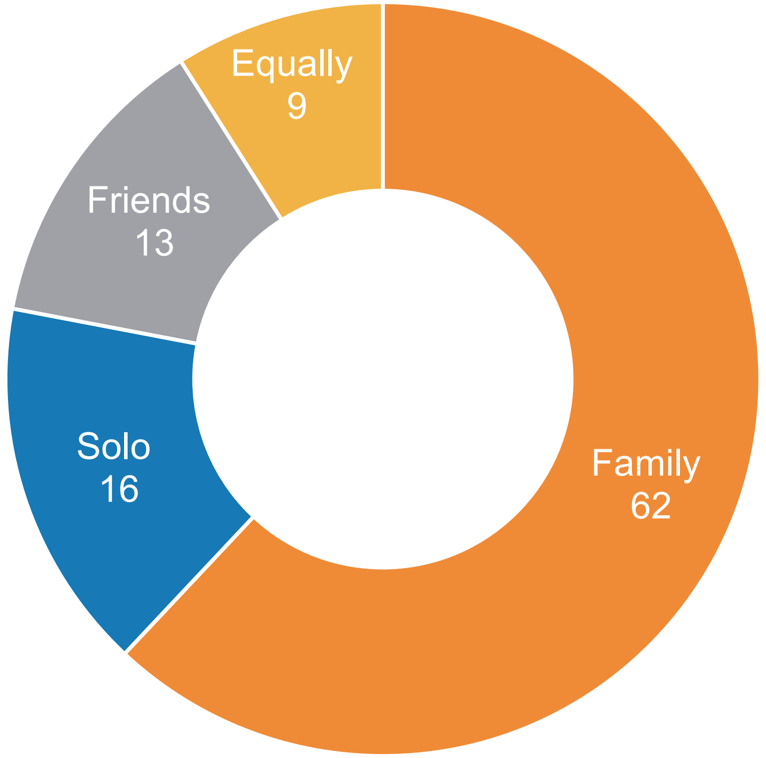


Destination



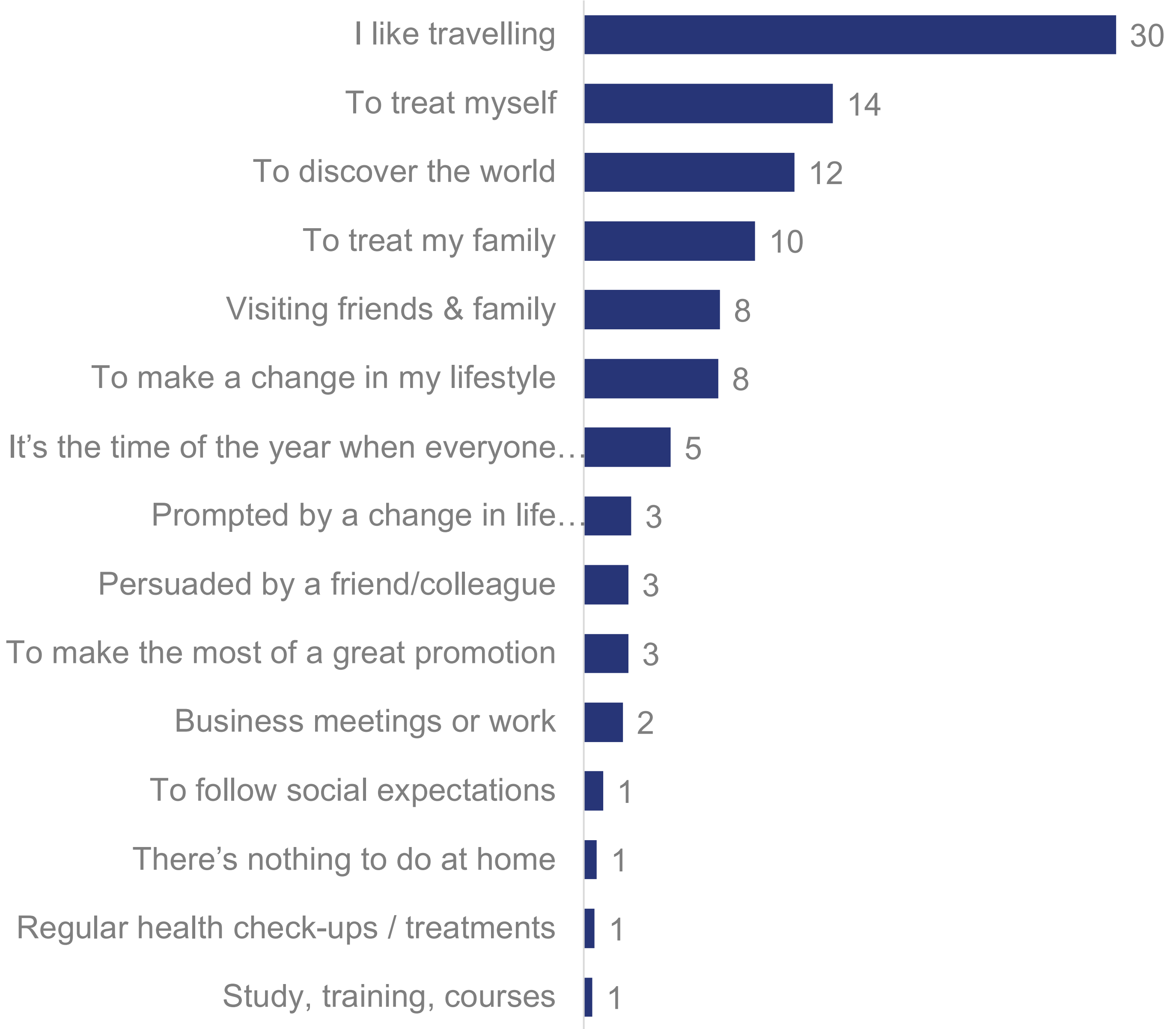
Multiple Answers

Companionship

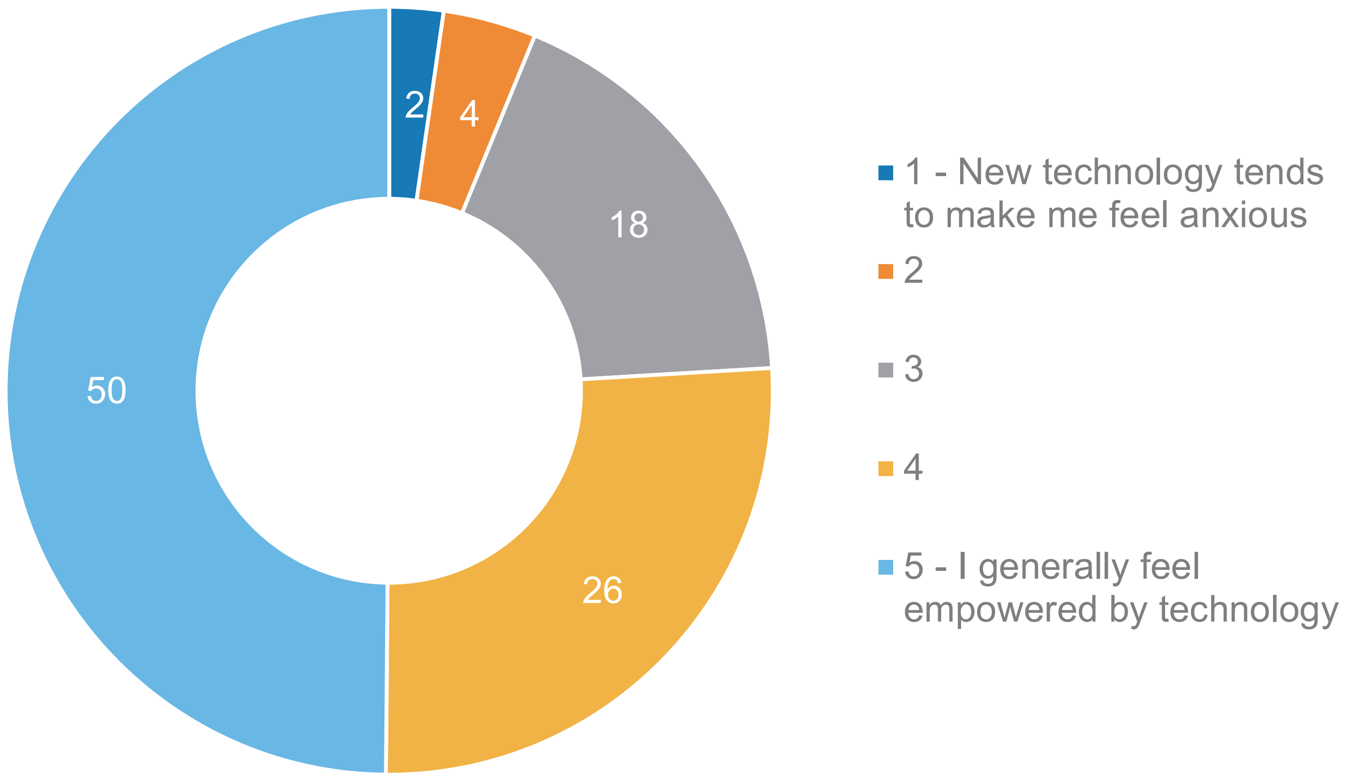


Mindset When Booking Travel

Motive for travelling



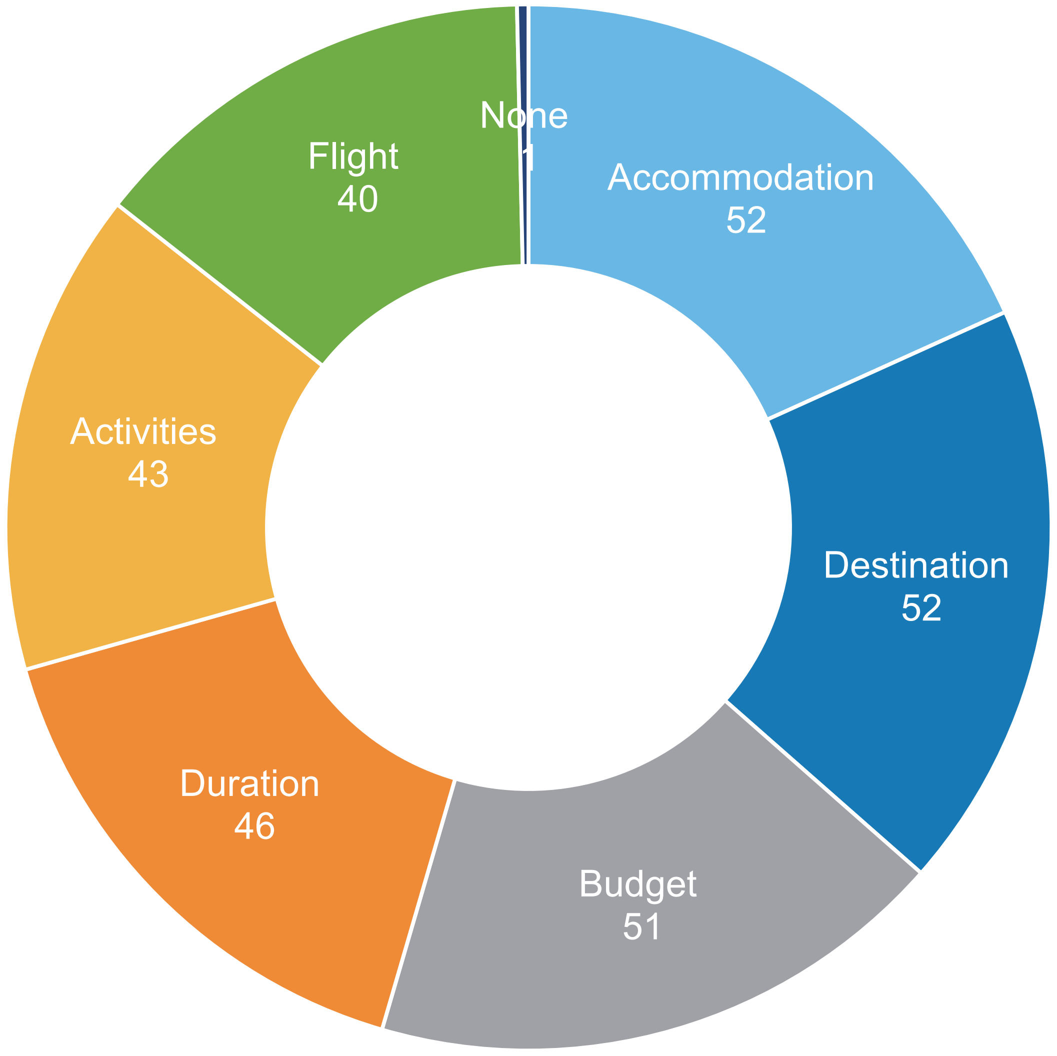
Tech savviness



Mindset When Booking Travel

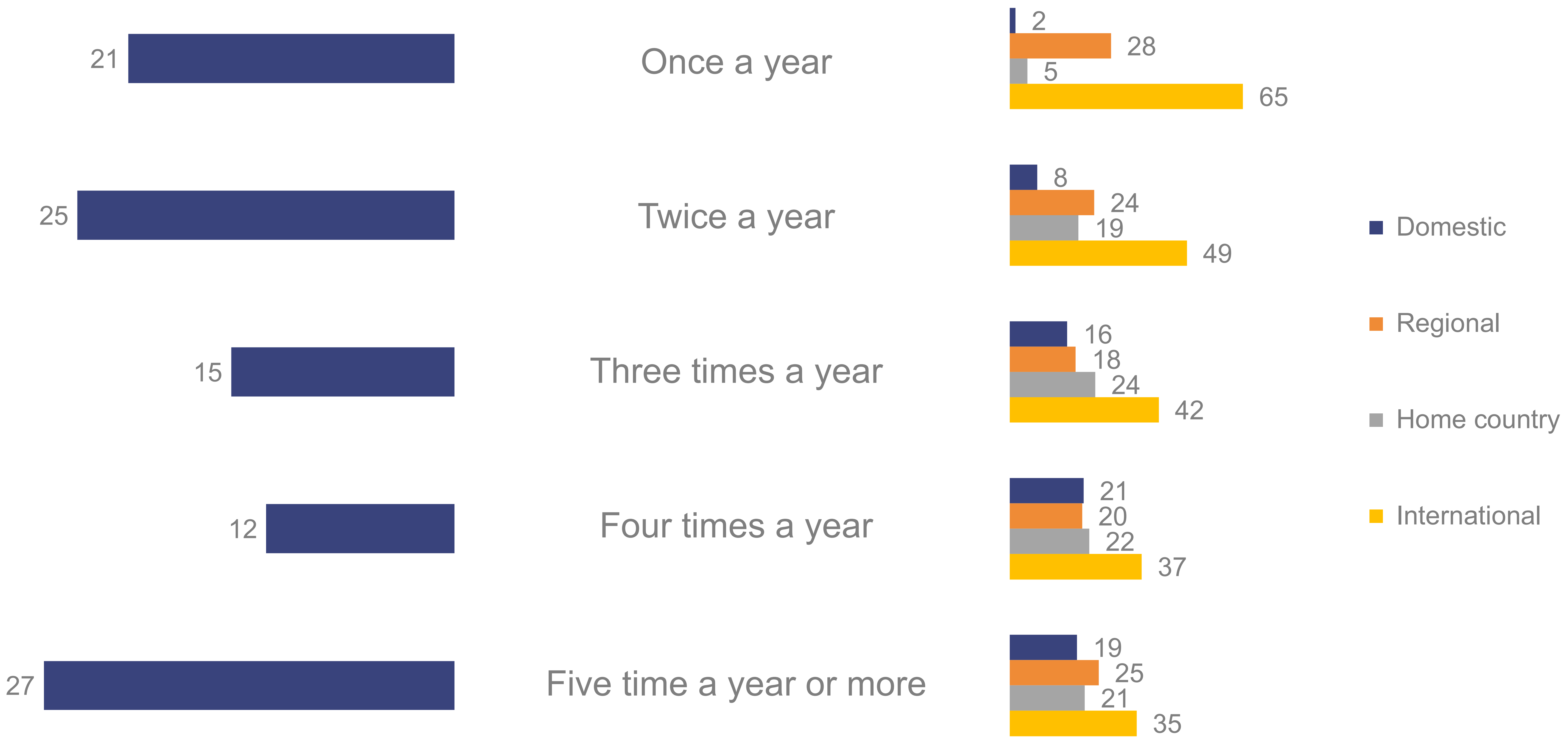
Exploration

Pre-Determination



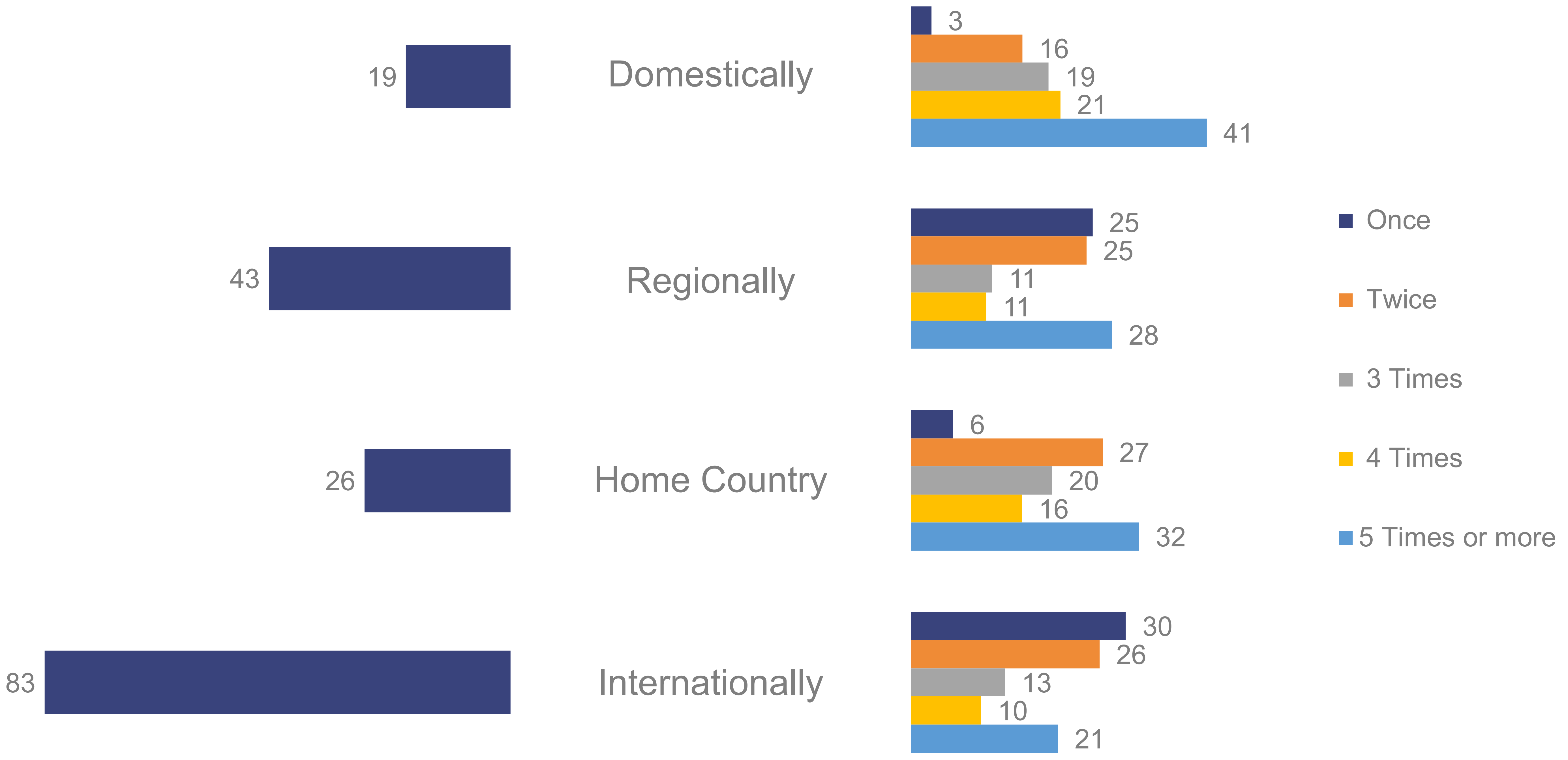
OPEN 53 **COMMITTED** 47

Travel Patterns by Frequency



Base: Frequency

Travel Patterns by Destination

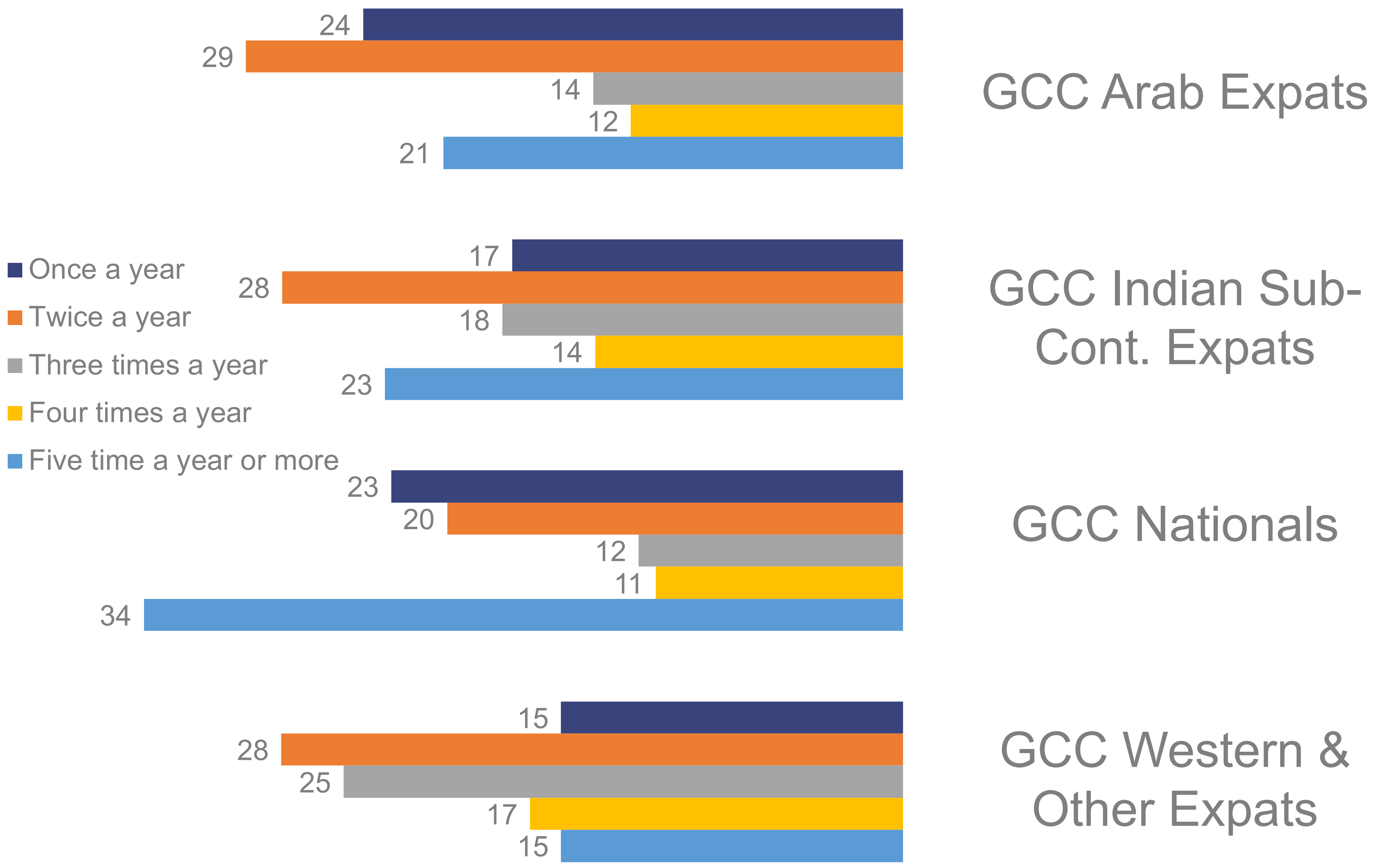


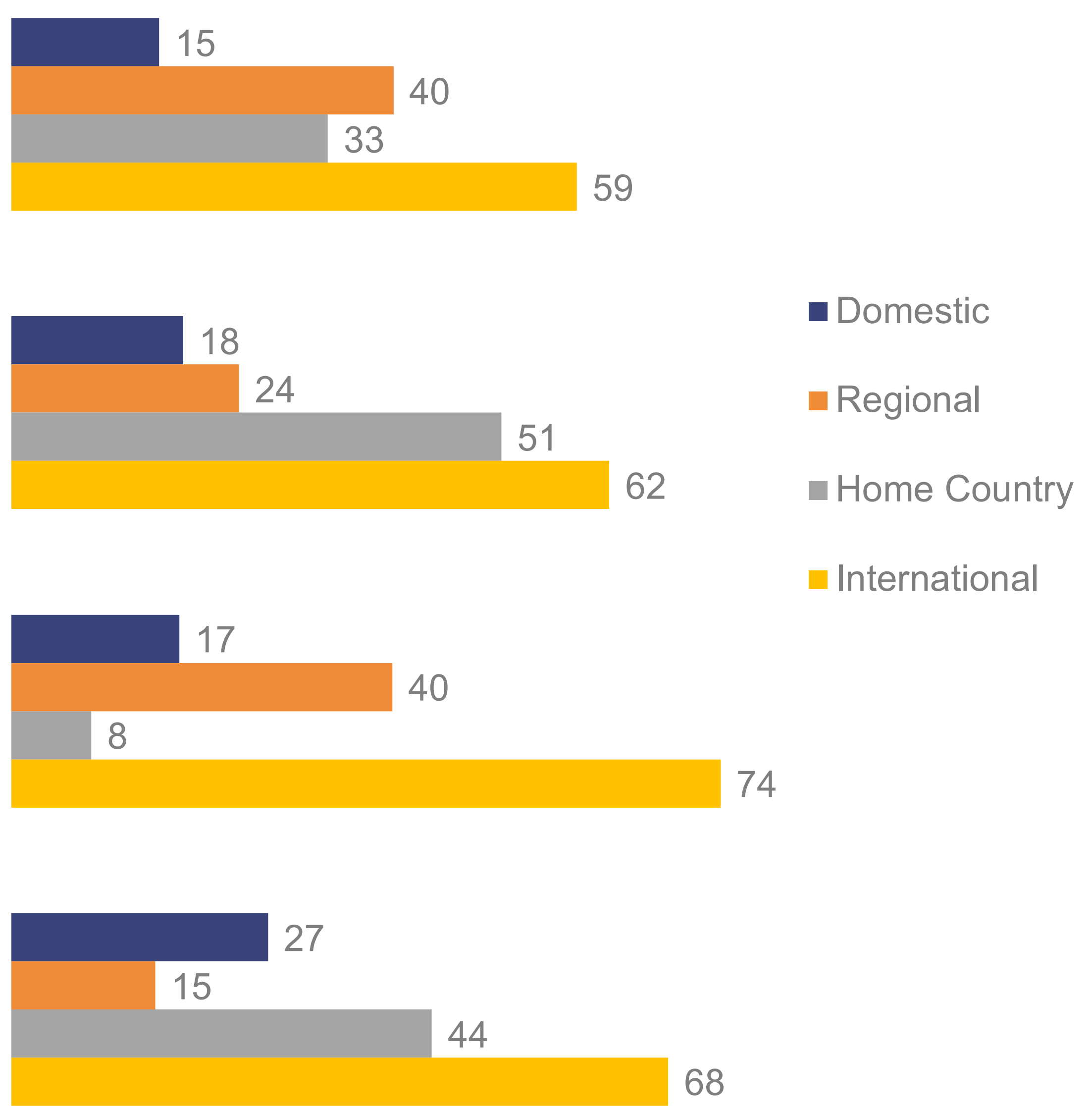
Multiple Answers

Base: Destination

By Origin

Frequency	Destination

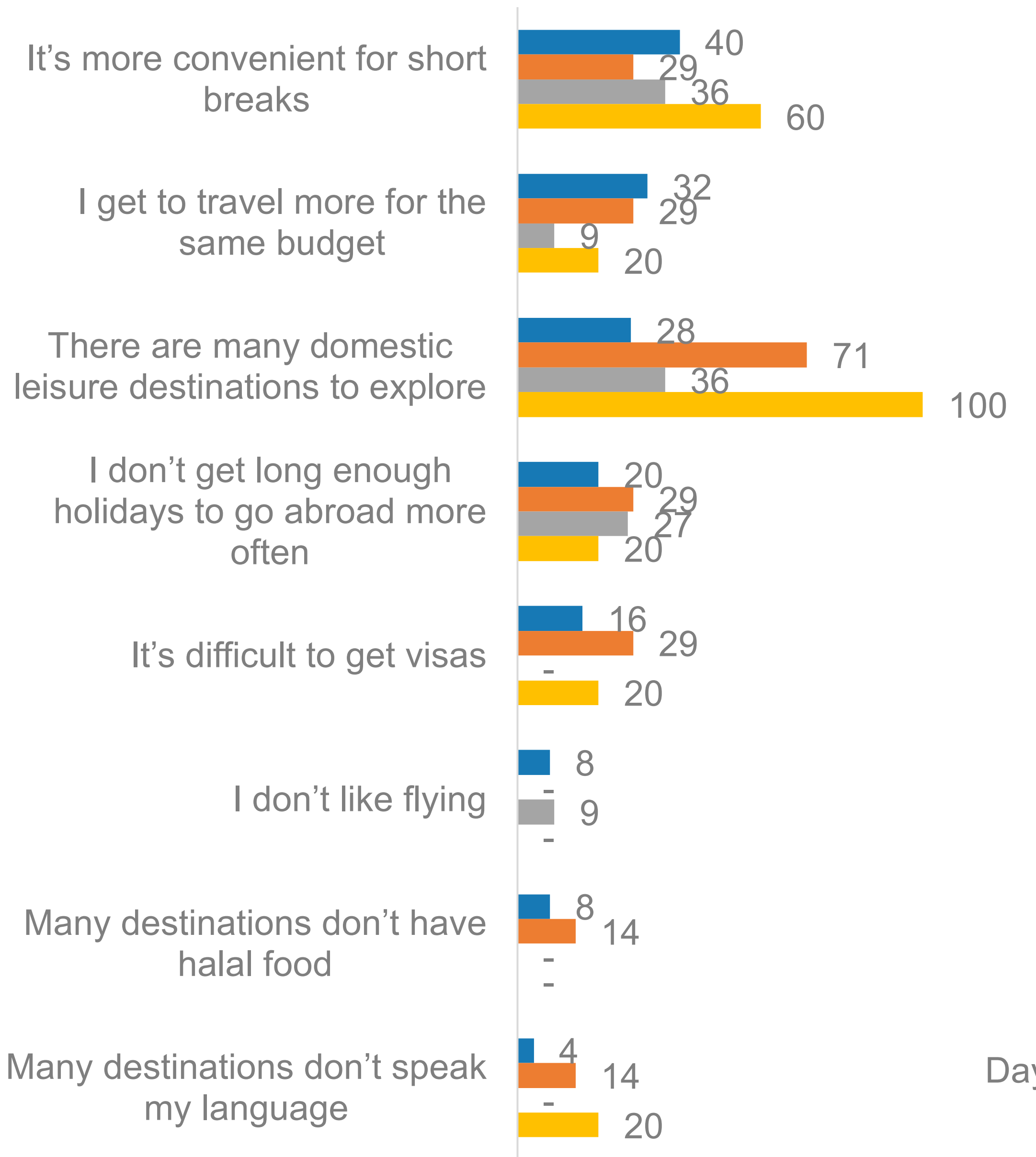




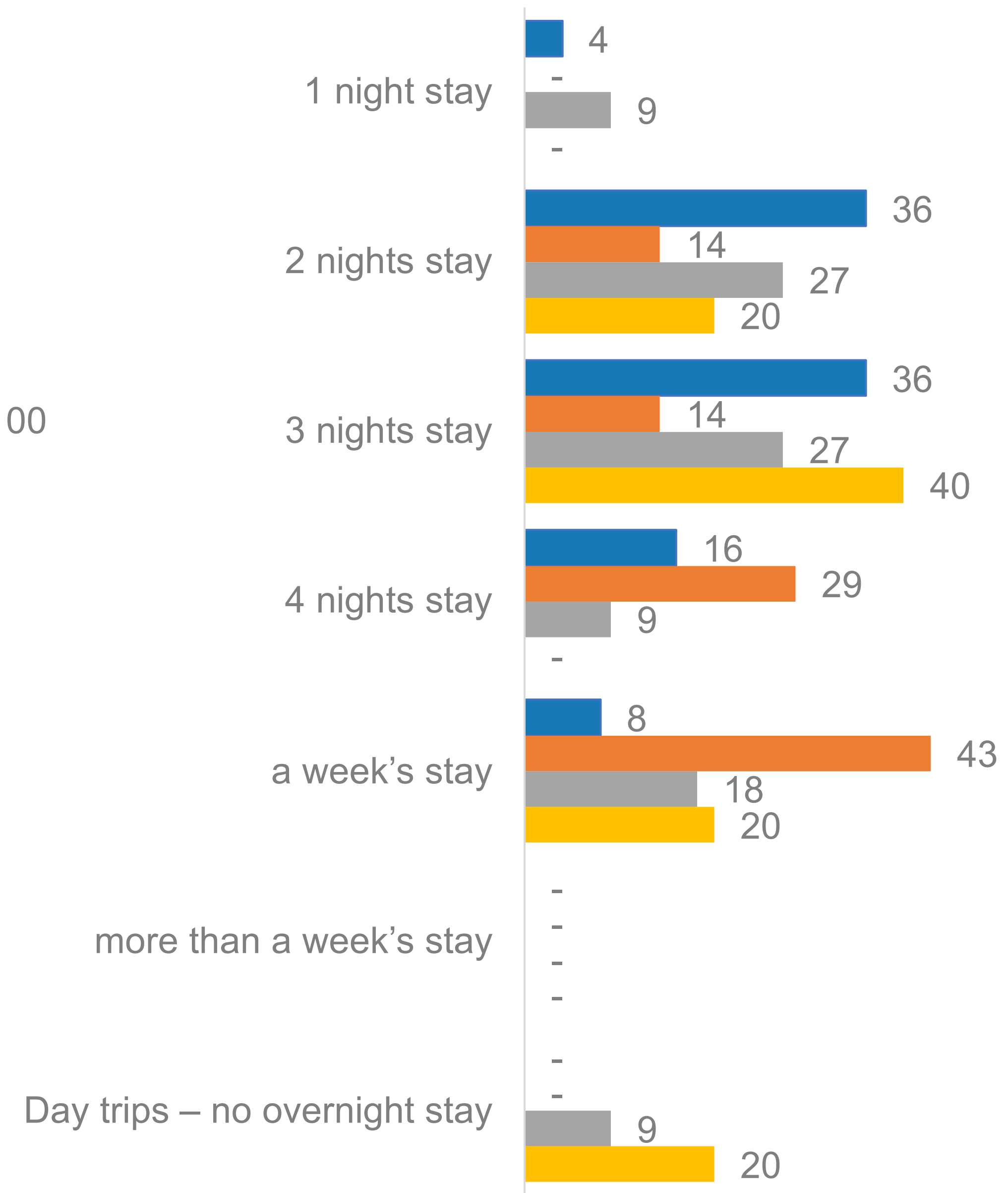
Multiple Answers

Domestic Travel

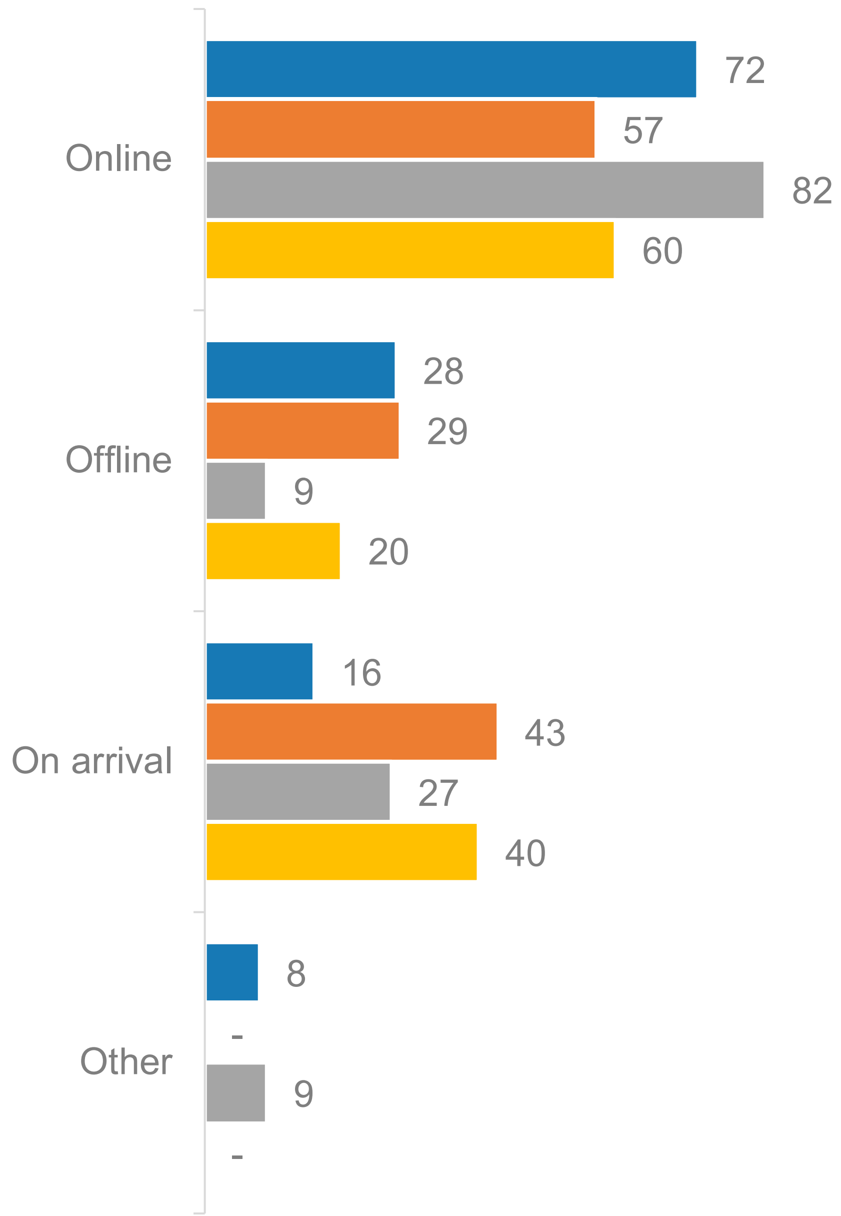
Reasons



Duration



Payment

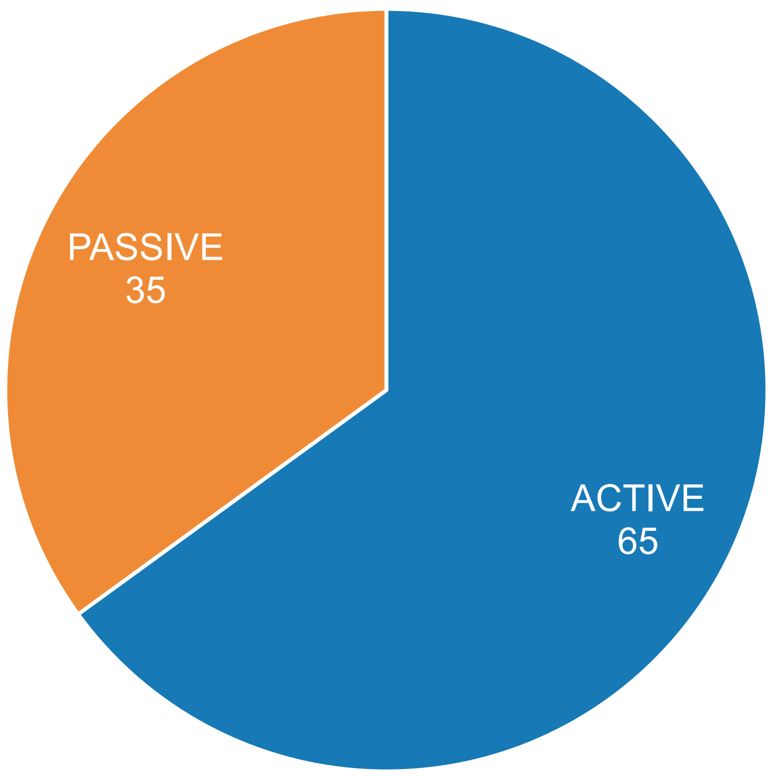


■ GCC Naitonals ■ GCC Arab Expats
■ GCC Indian Sub-Cont. Expats ■ GCC Western & Other Expats

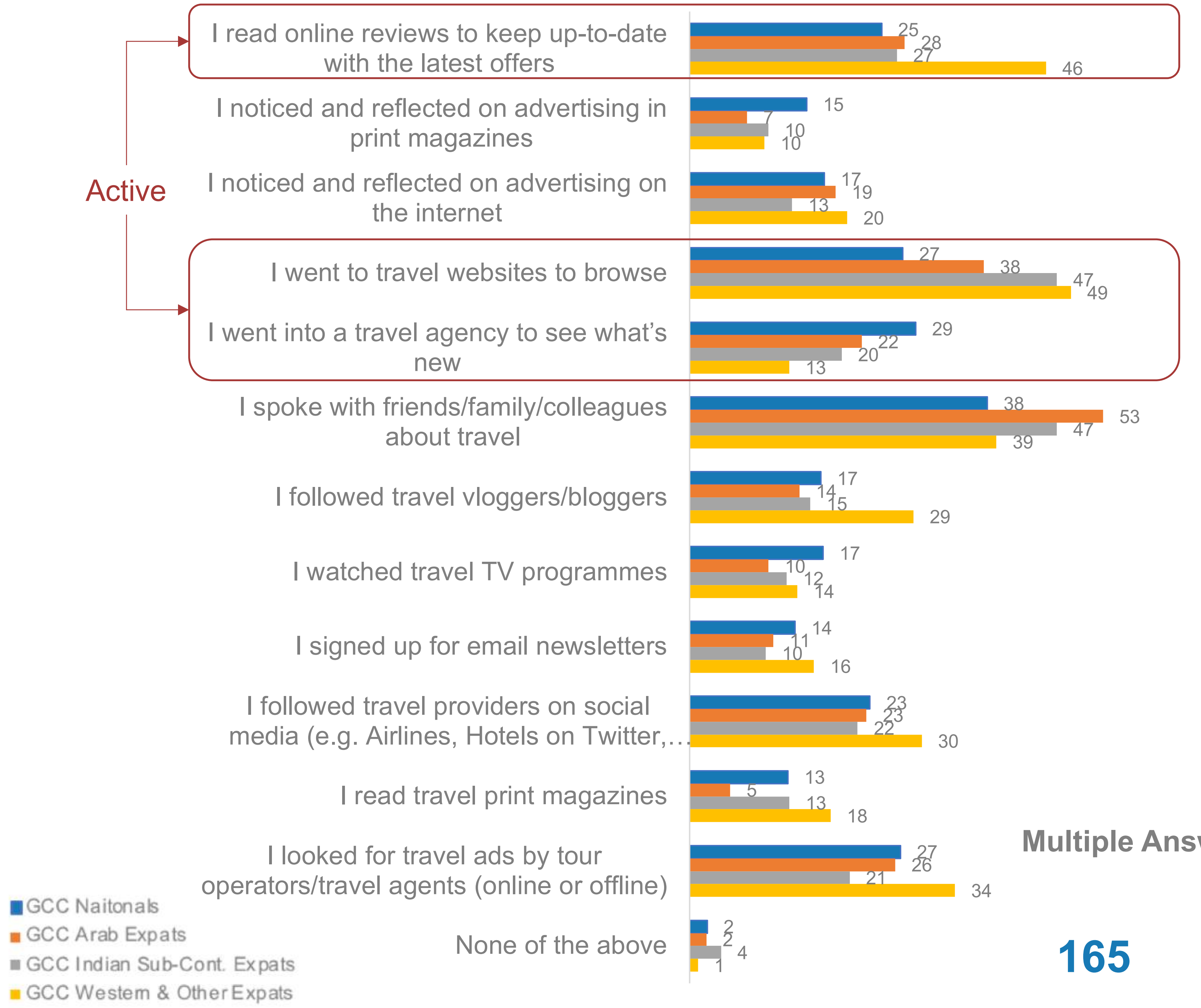
Multiple Answers

Awareness

Awareness



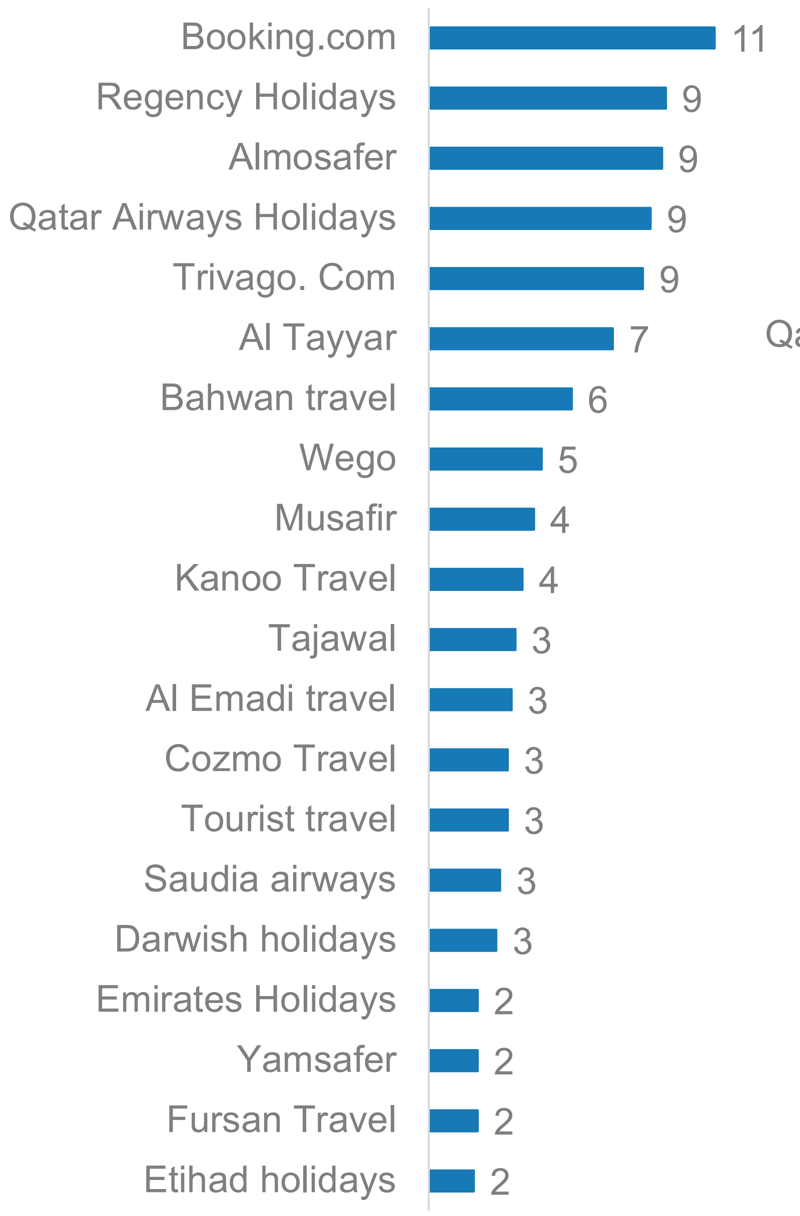
Sources of travel info



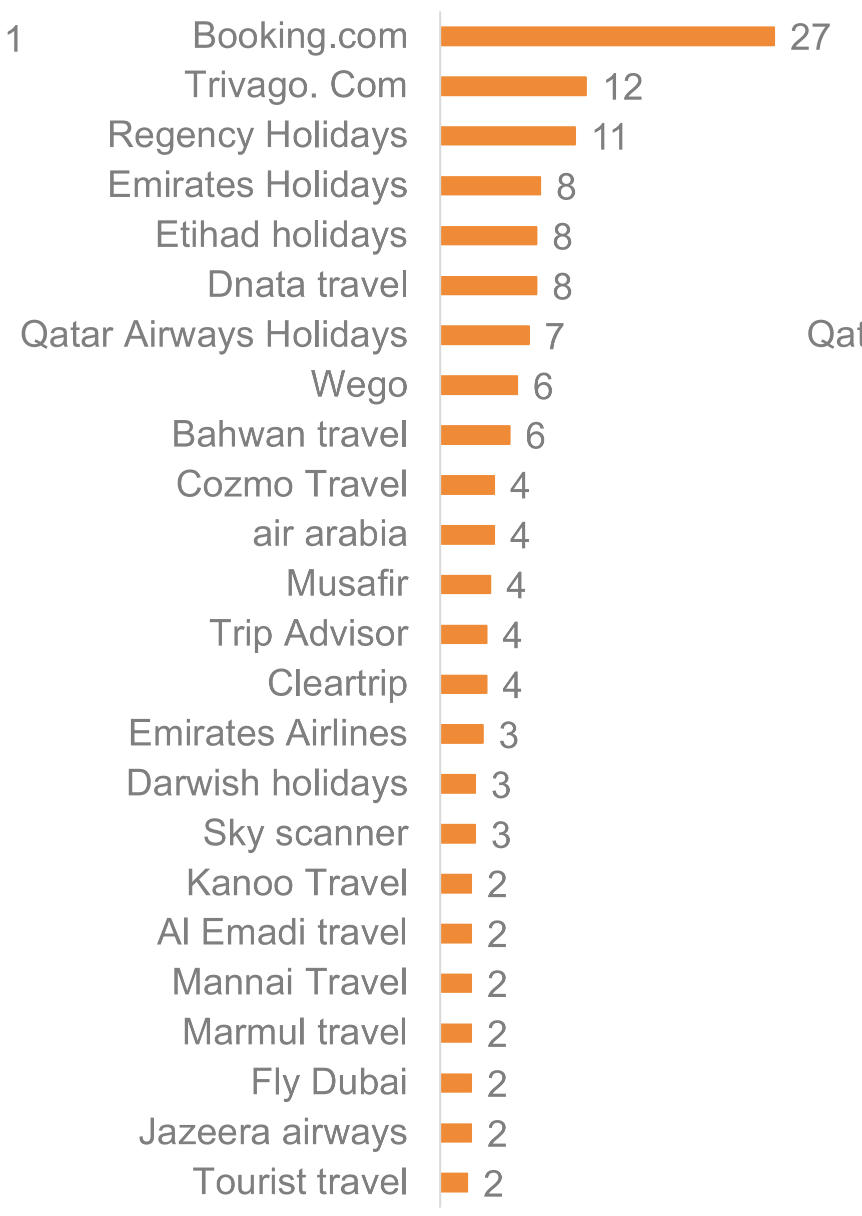
Multiple Answers

Top-of-Mind Awareness

GCC Nationals

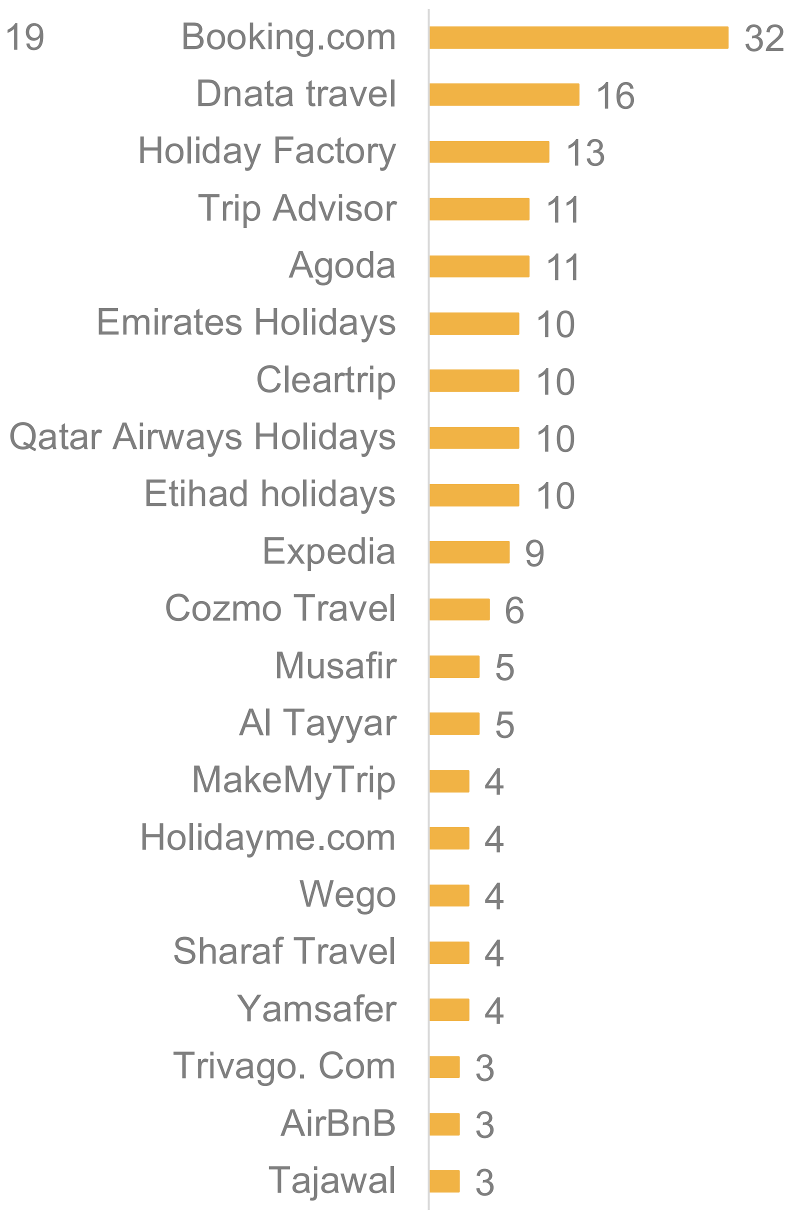


GCC Arab Expats

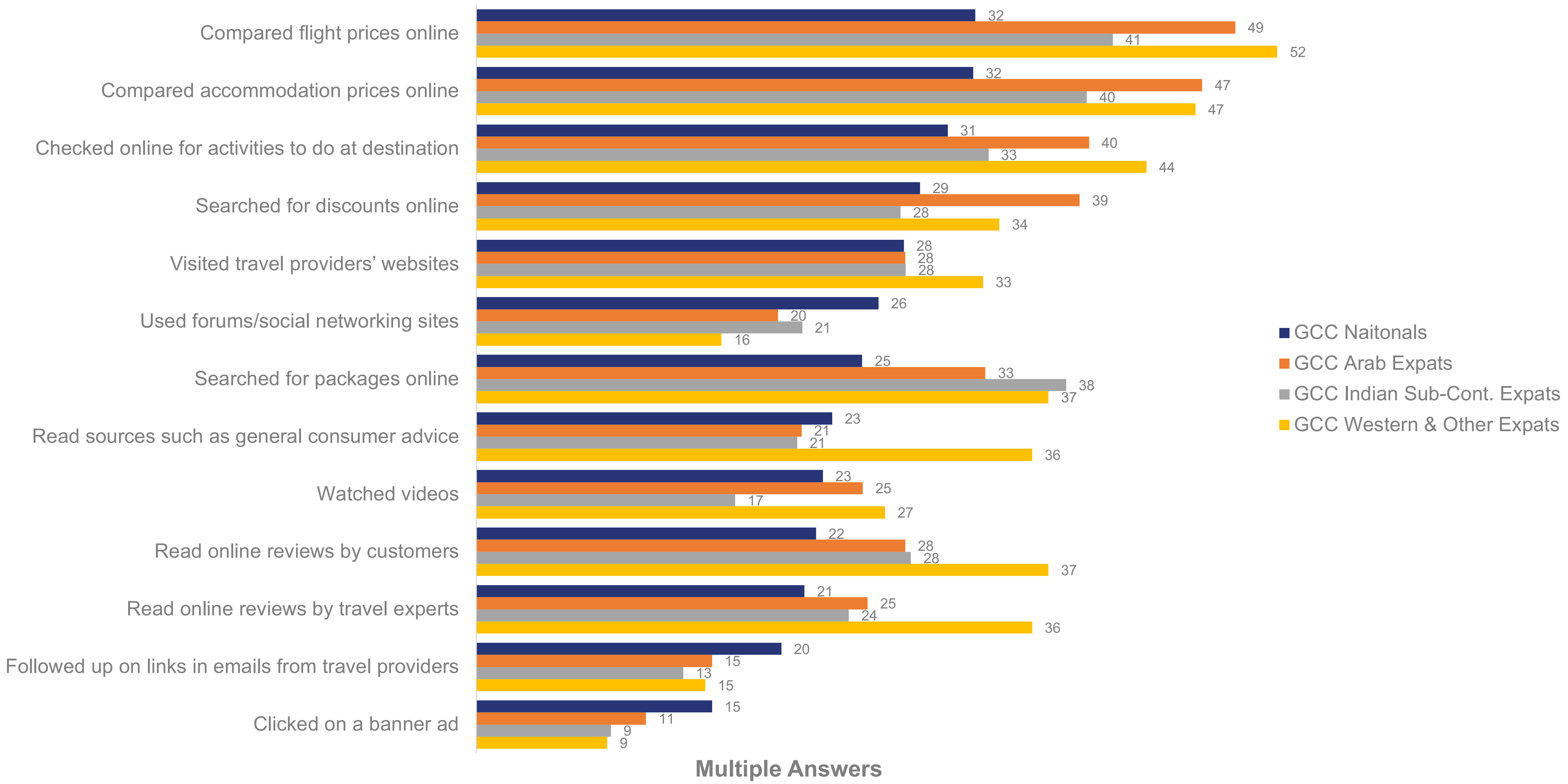


GCC Indian Sub-Cont. Expats

GCC Western & Other Expats

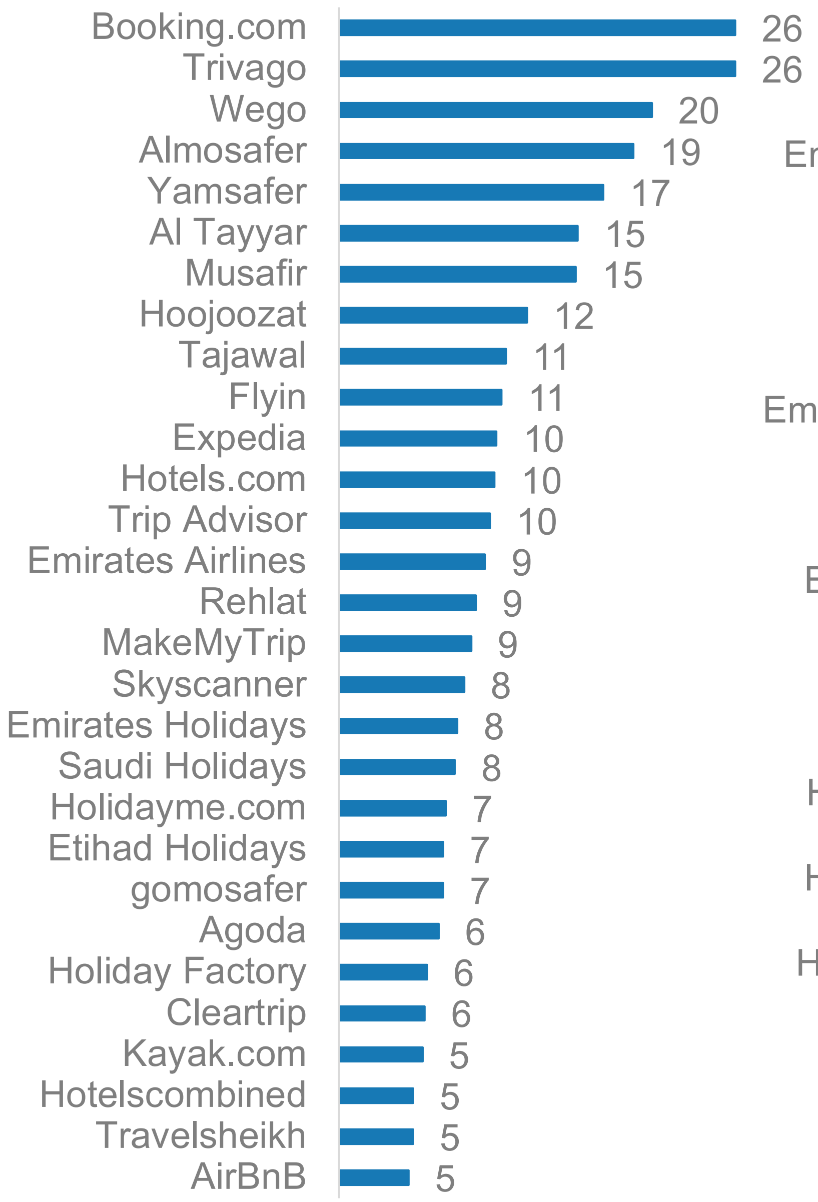


Online Search Points

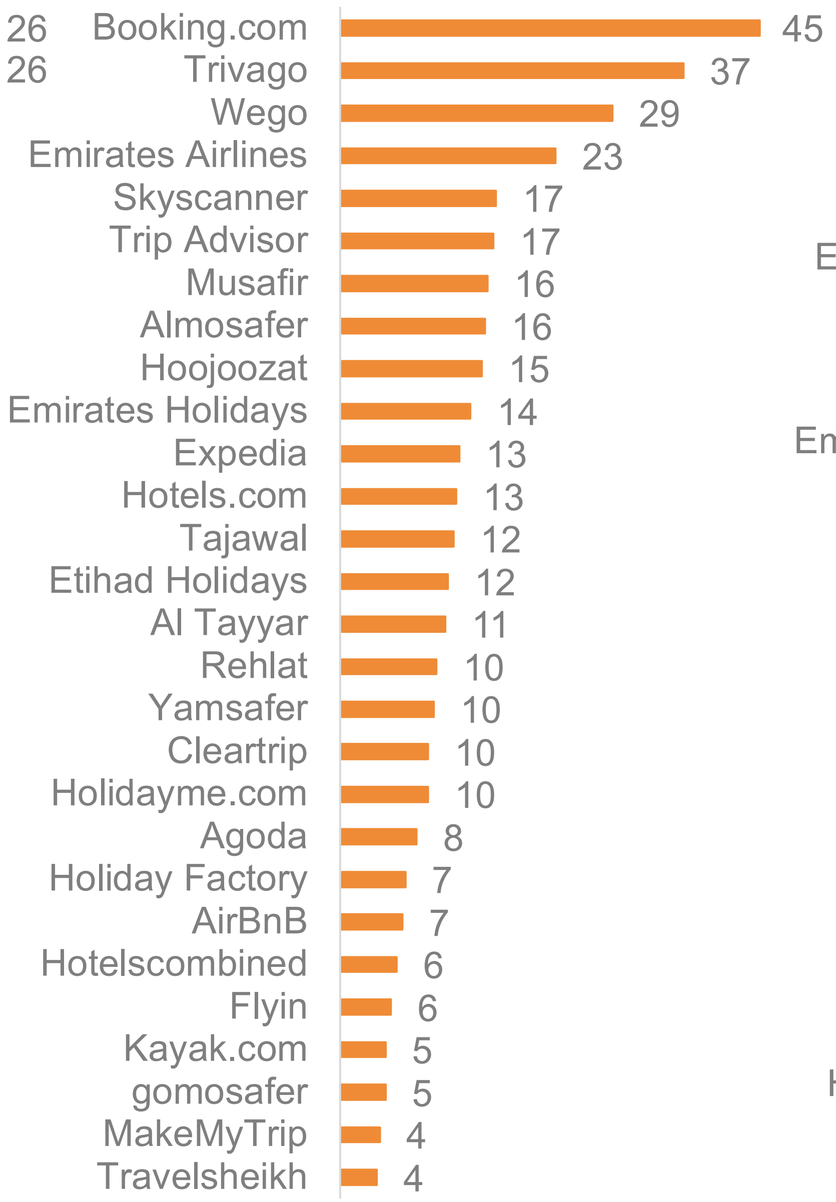


Top Websites Used for Booking

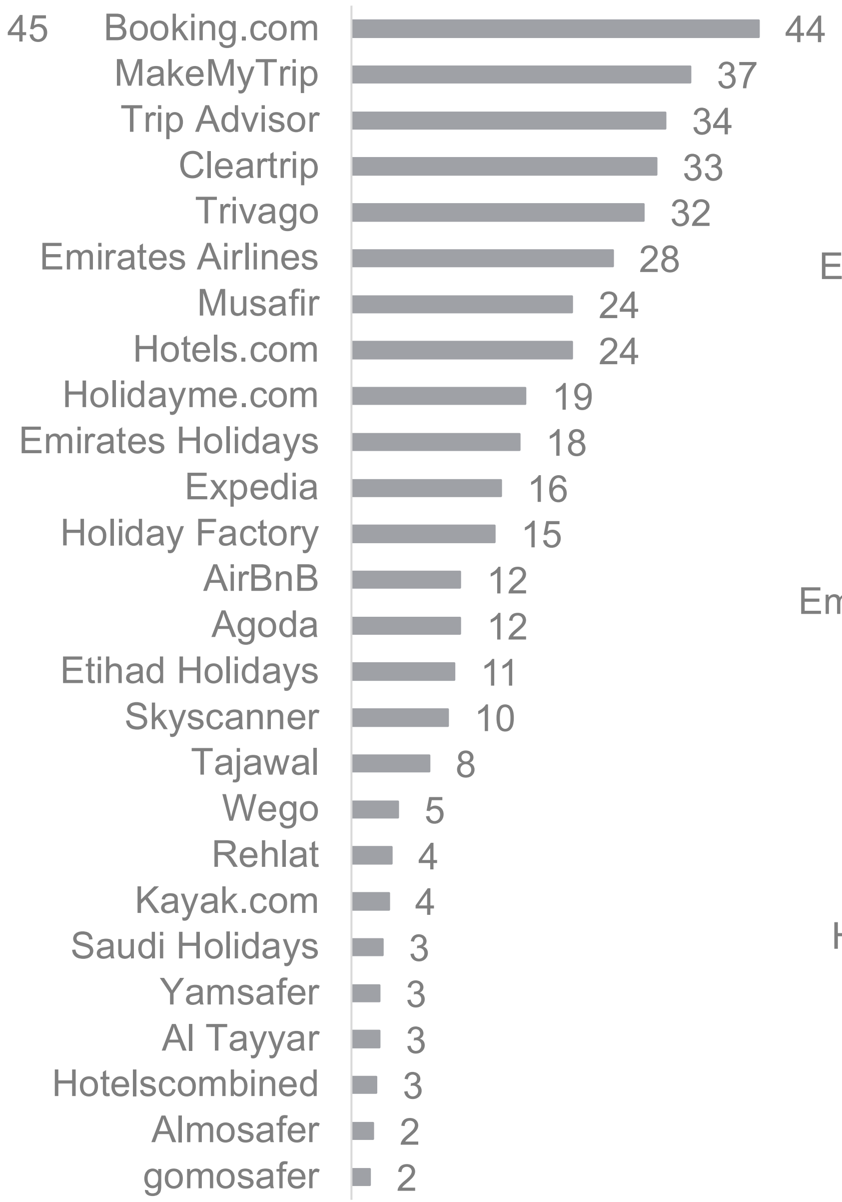
GCC Nationals



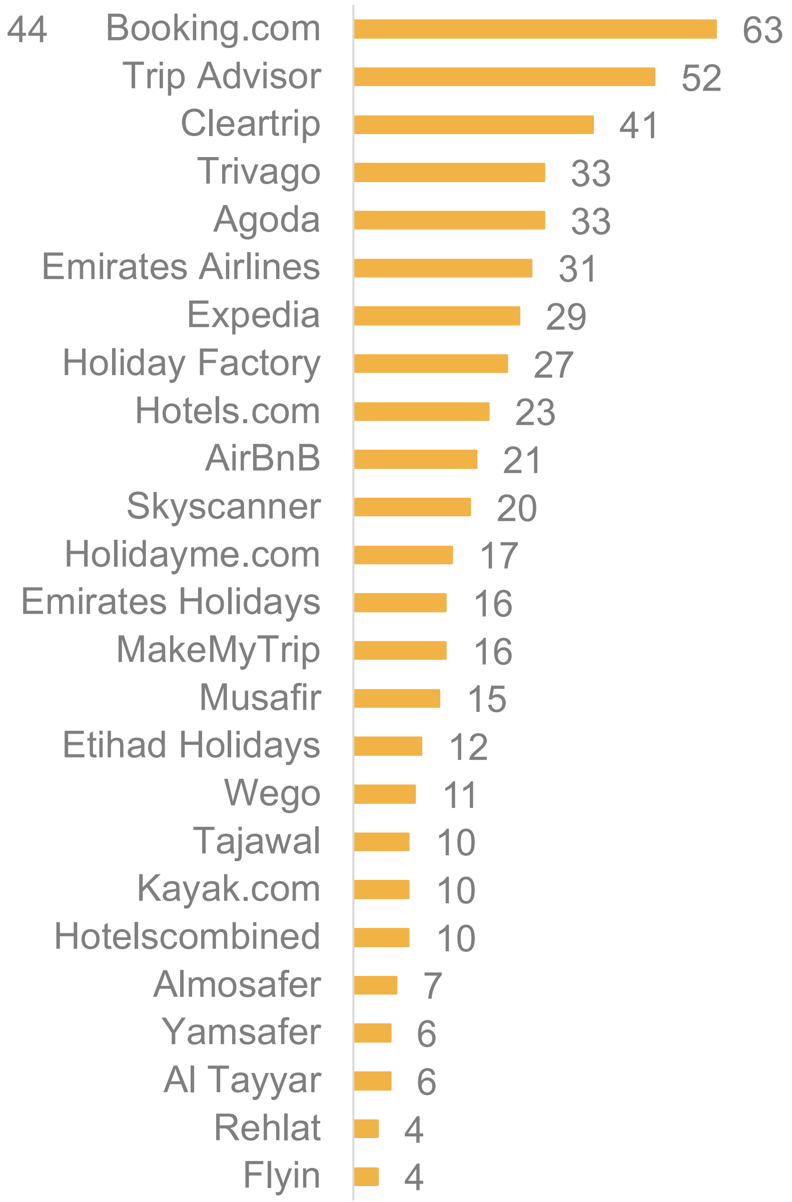
GCC Arab Expats



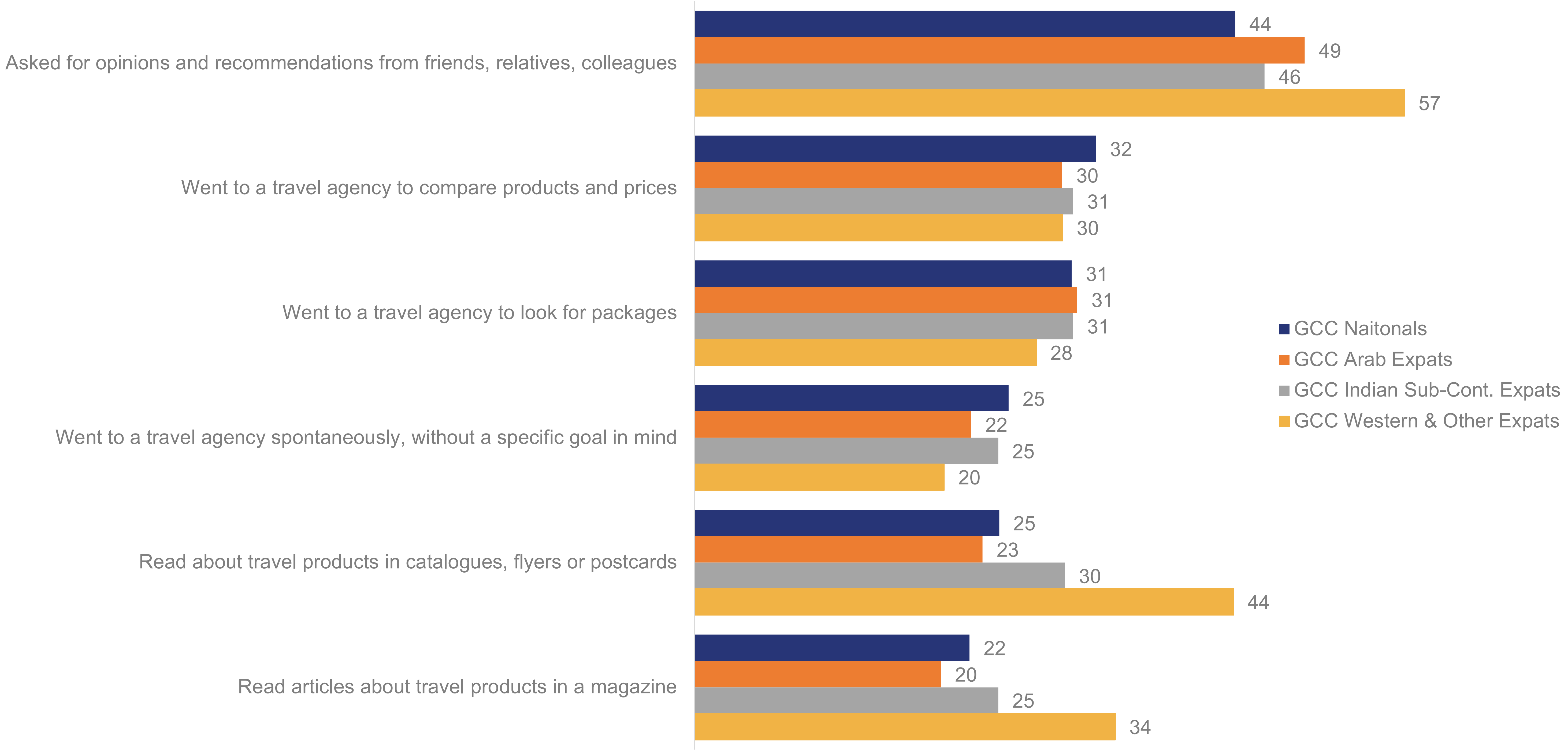
GCC Indian Sub-Cont. Expats



GCC Western & Other Expats



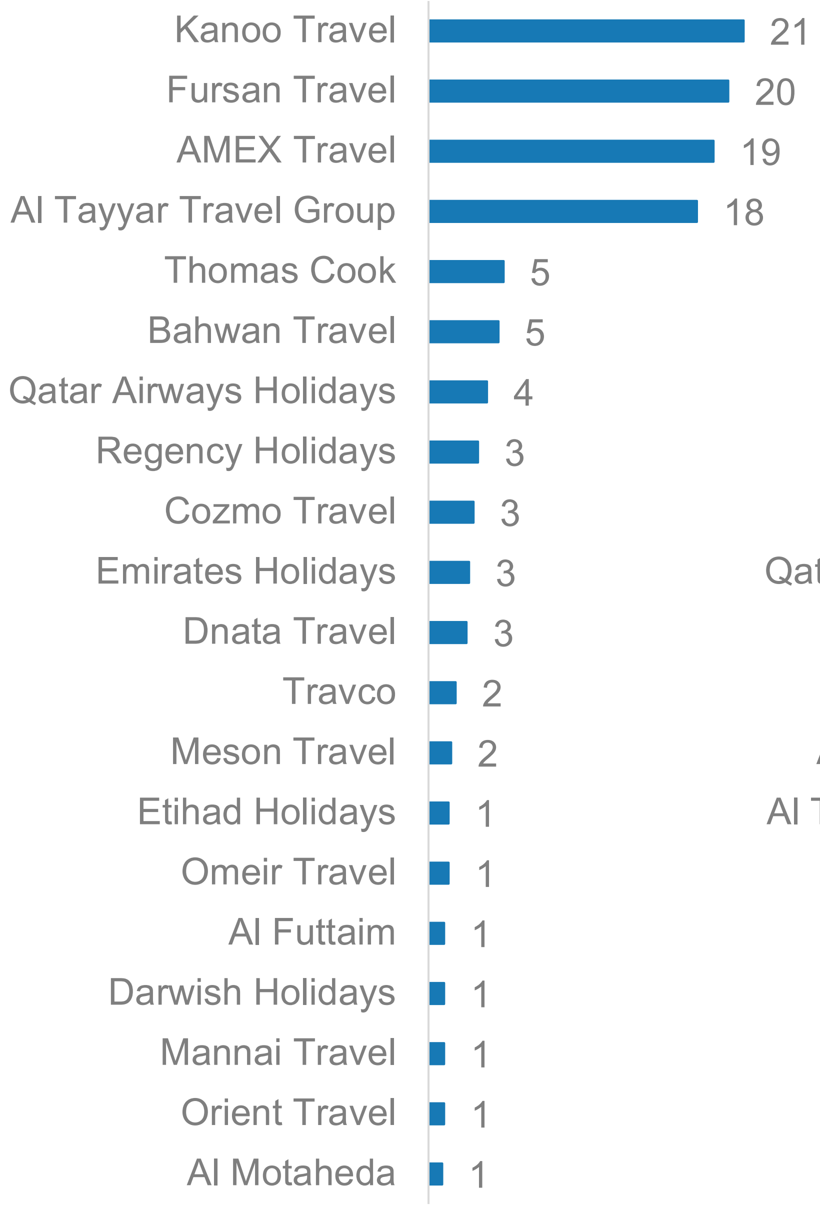
Offline Search Points



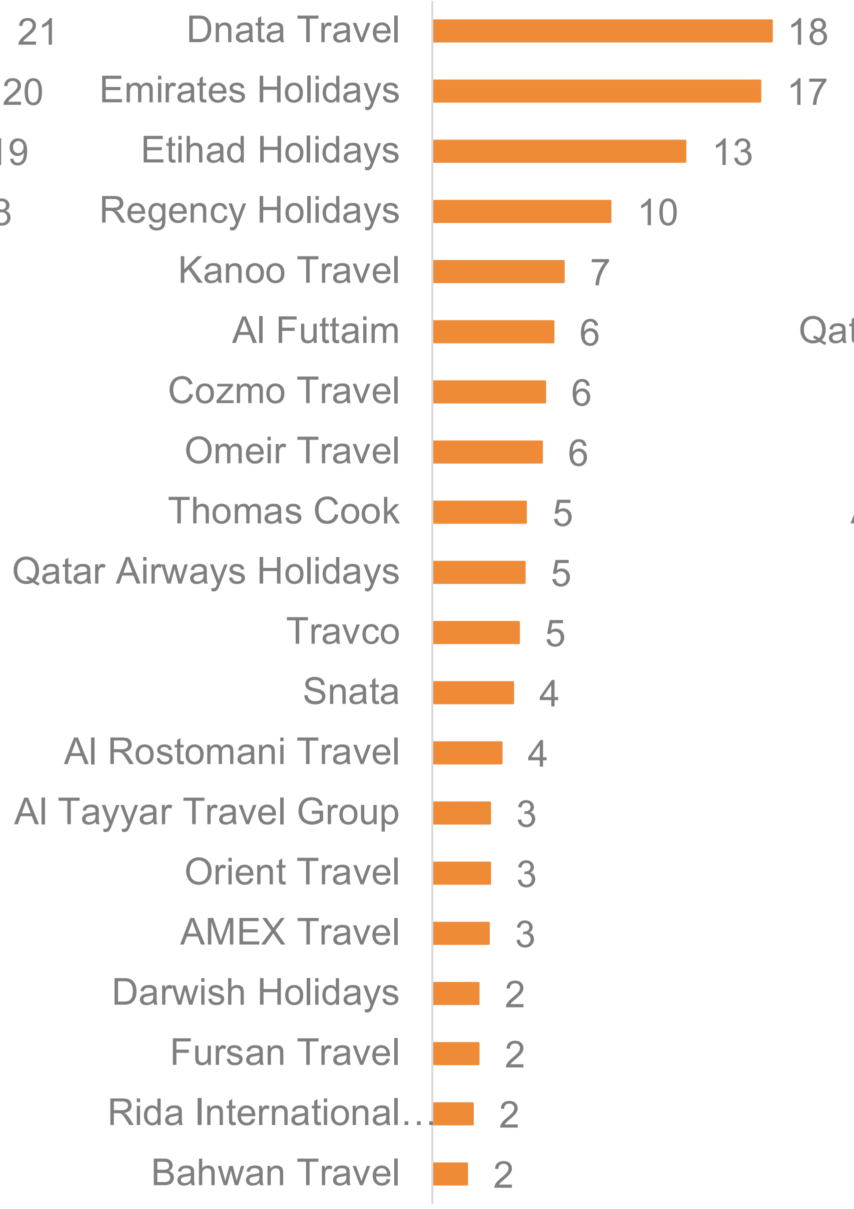
Multiple Answers

Top Travel Agents Used for Booking

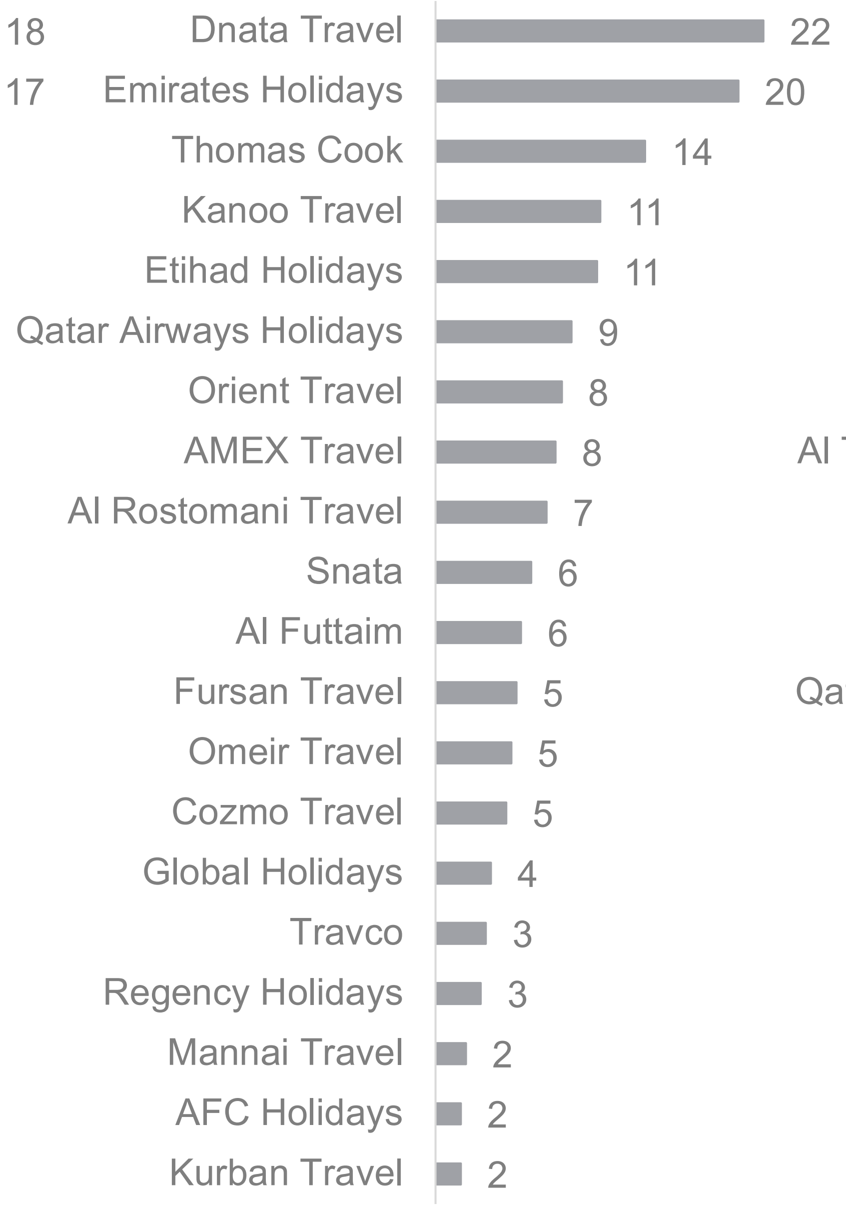
GCC Nationals



GCC Arab Expats

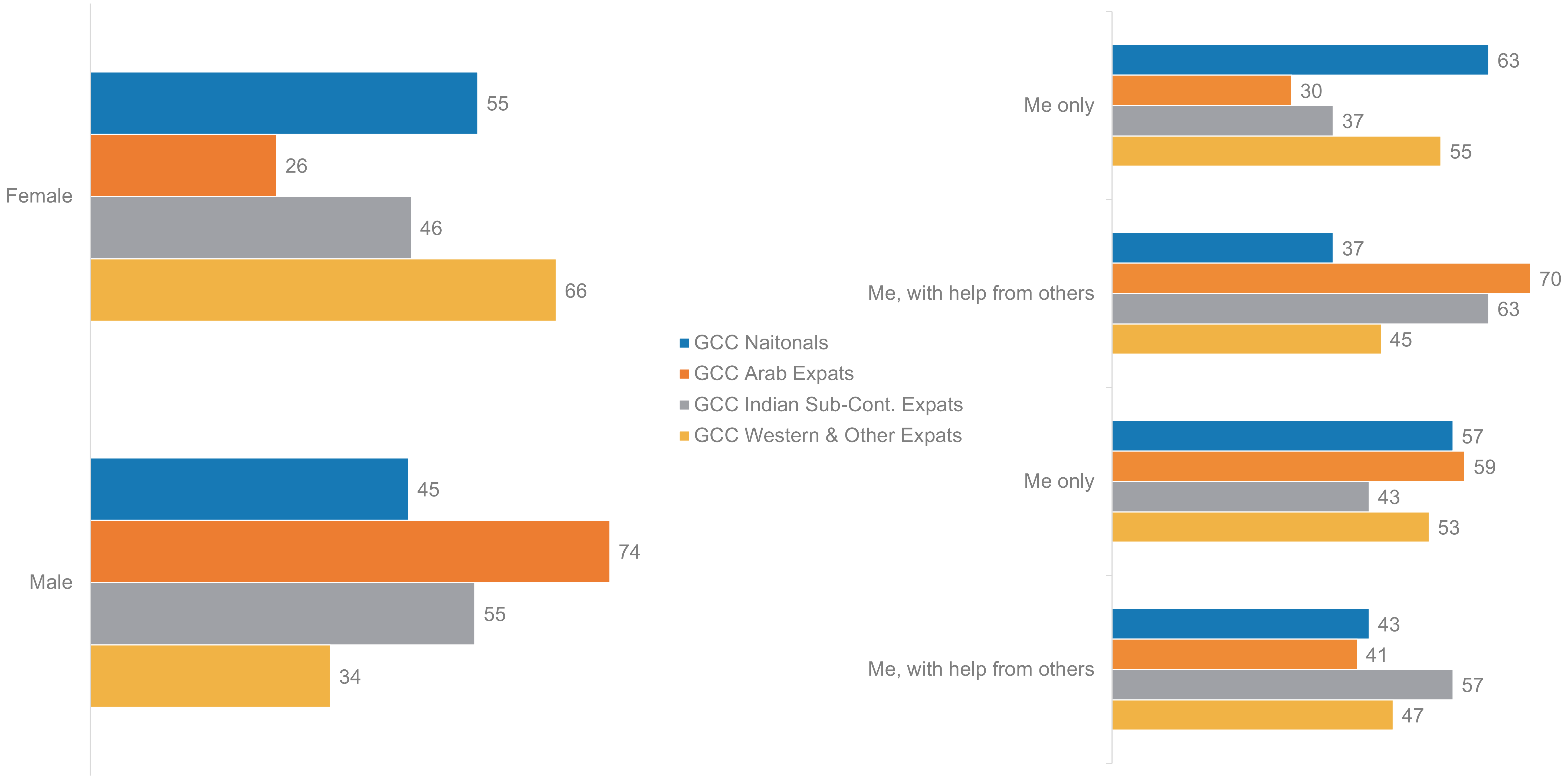


GCC Indian Sub-Cont. Expats



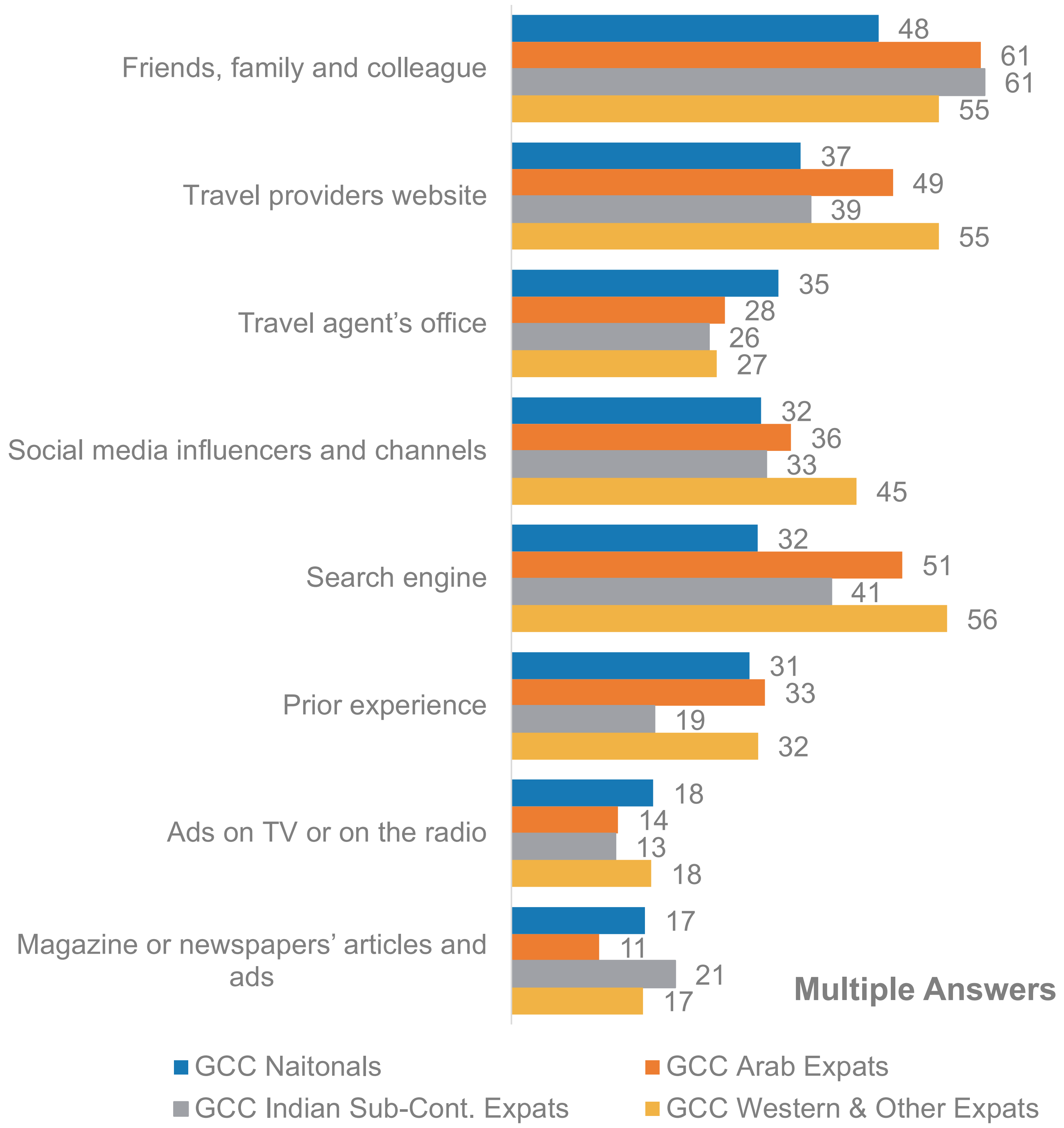
GCC Western & Other Expats

Decision Process: Who Decides?



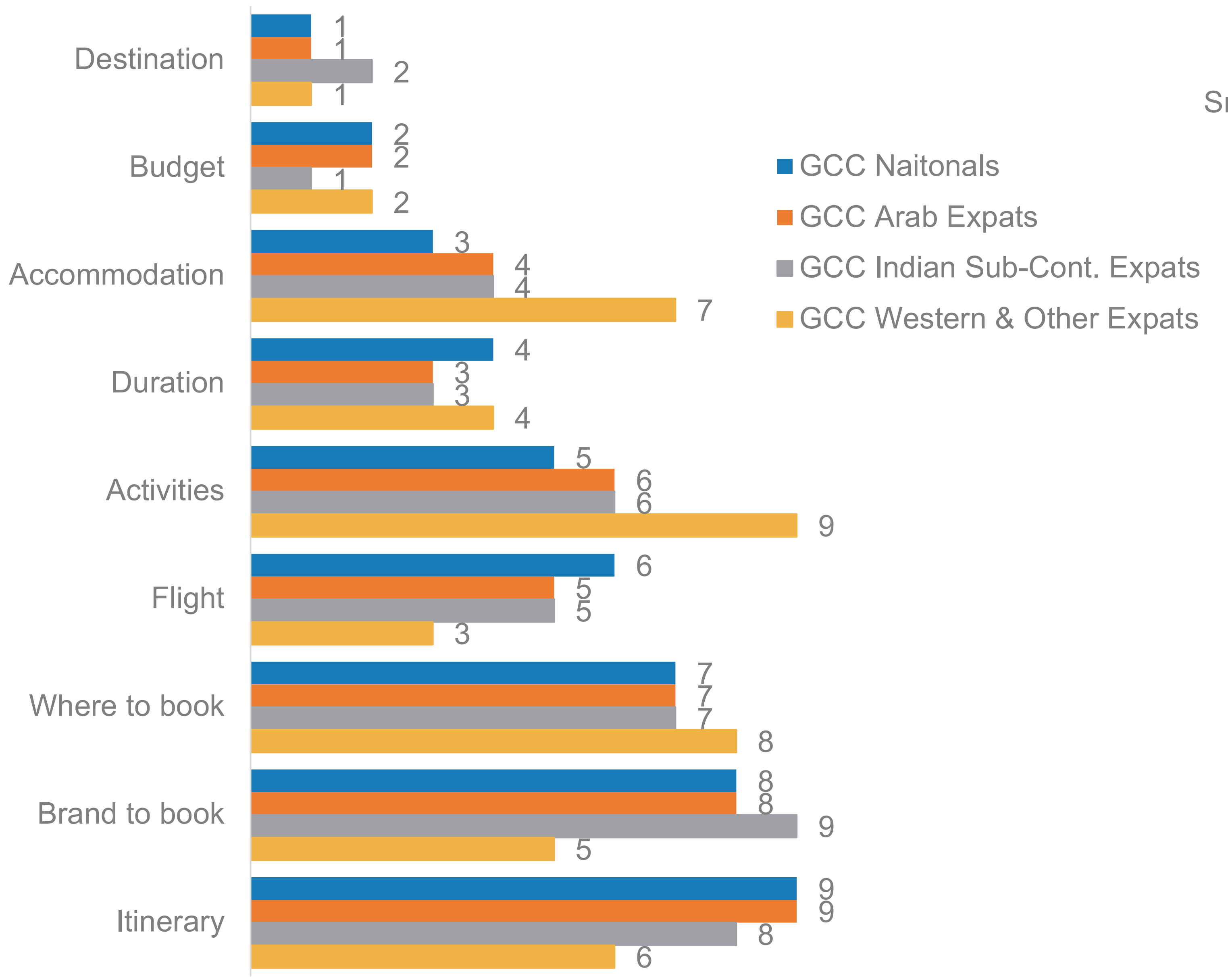
Influencers

- 61% of the Arab and Indian Subcontinent Expats admitted to being influenced by Friends, Family & Colleagues (vs. 53% of the overall sample). For Nationals this was only 48%
- 55% of the Western & Other Expats and 49% of the Arab Expats are influenced by Travel providers sites (vs. 46% of the overall sample)
- 56% of the Western & Others Expats and 51% of the Arab Expats are influenced by Search Engines (vs. 46% of the overall sample)
- Nationals are slightly more influenced by Travel Agents since 35% admit being influenced by Agents vs. 31% on the overall sample

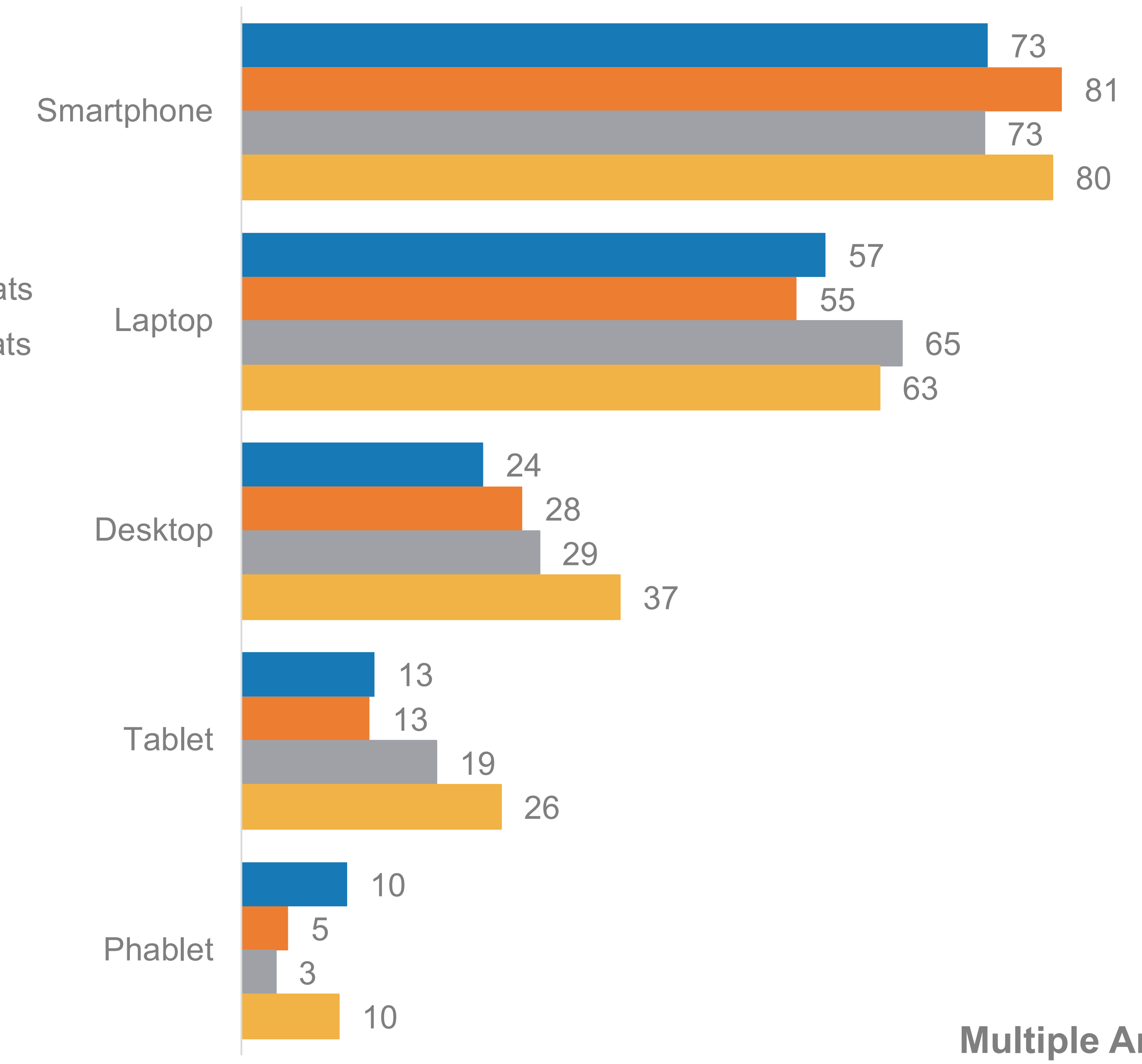


General Considerations

Decision cycle



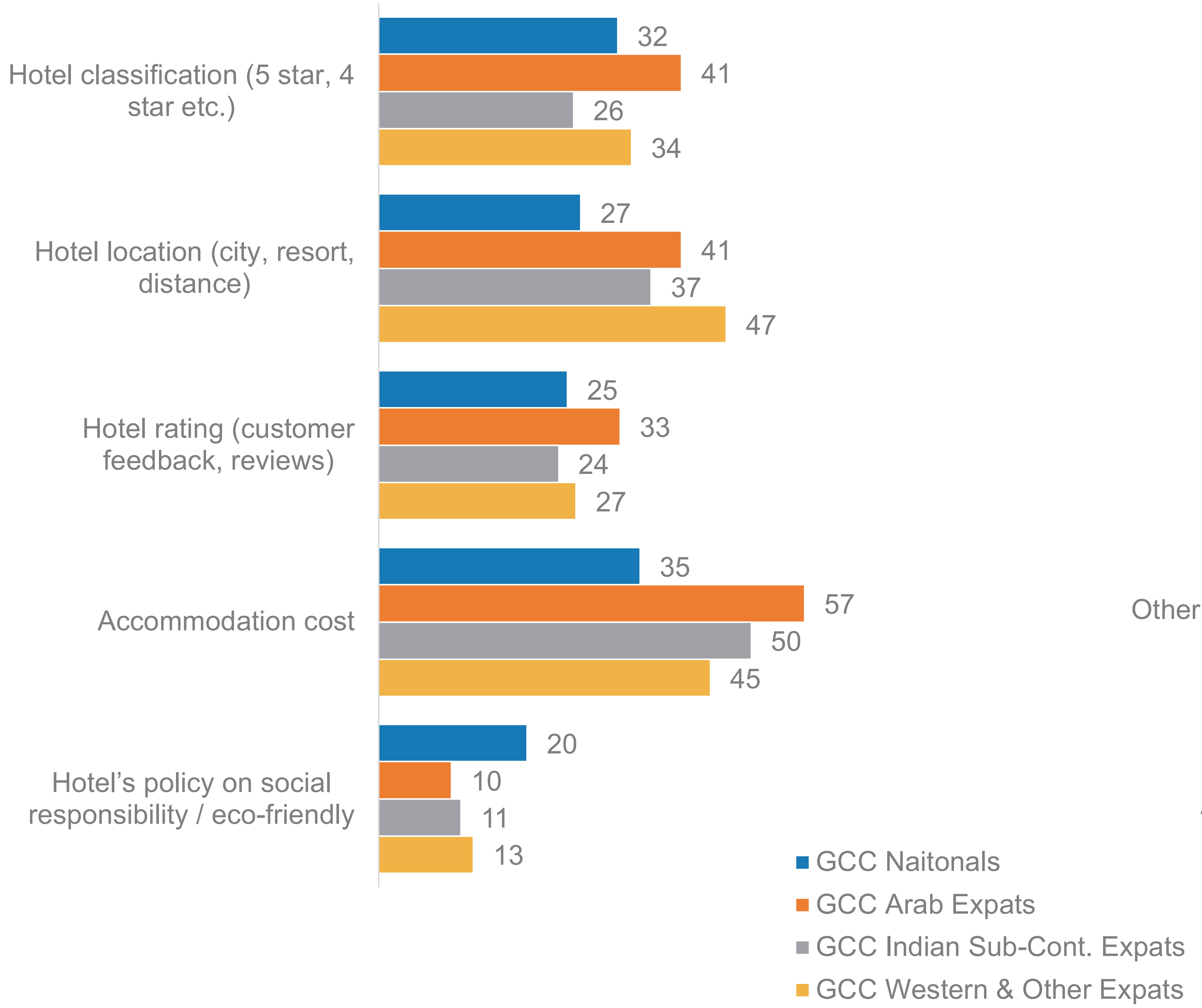
Device used for search



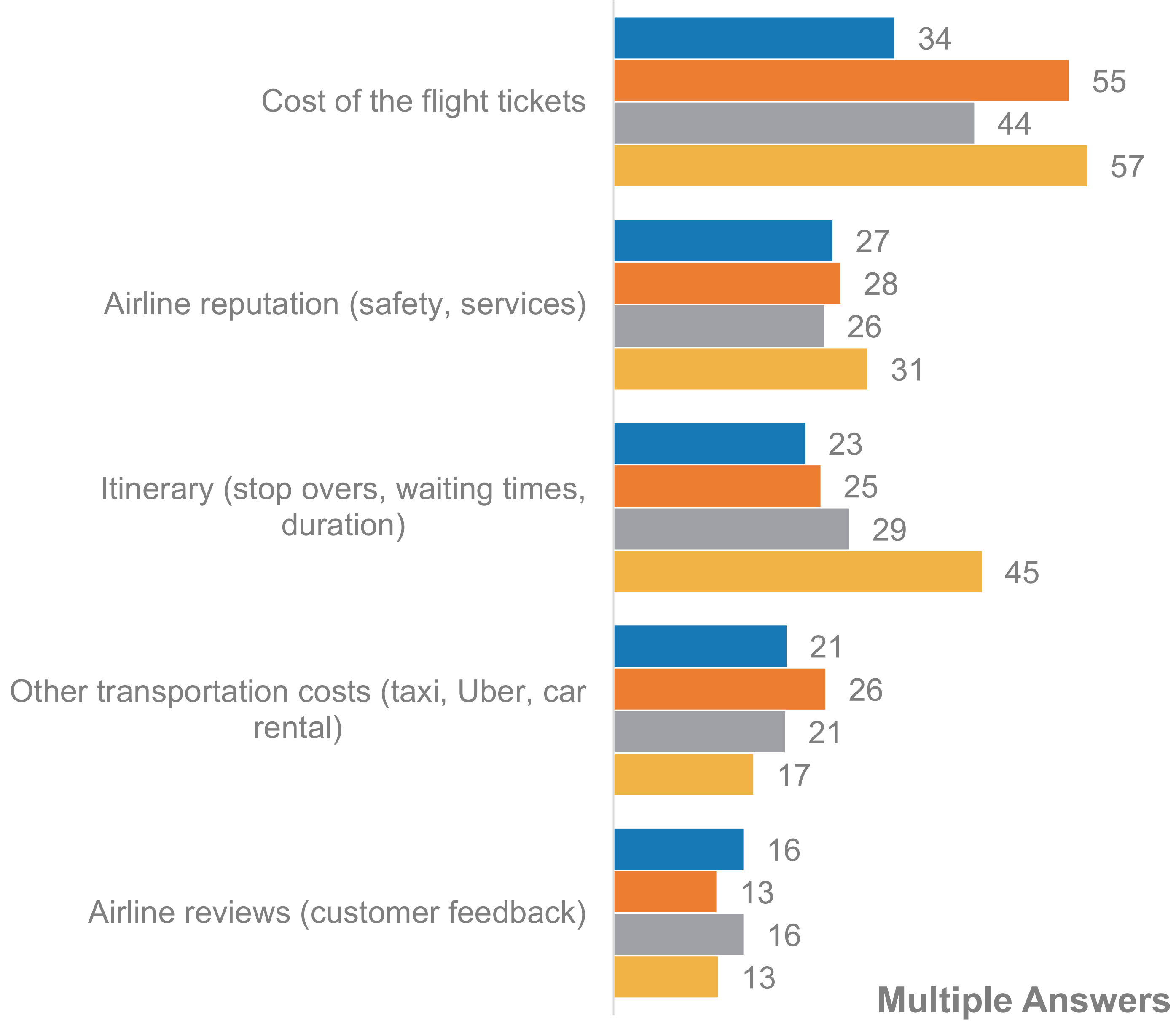
Multiple Answers

Destination Evaluation

Accommodation

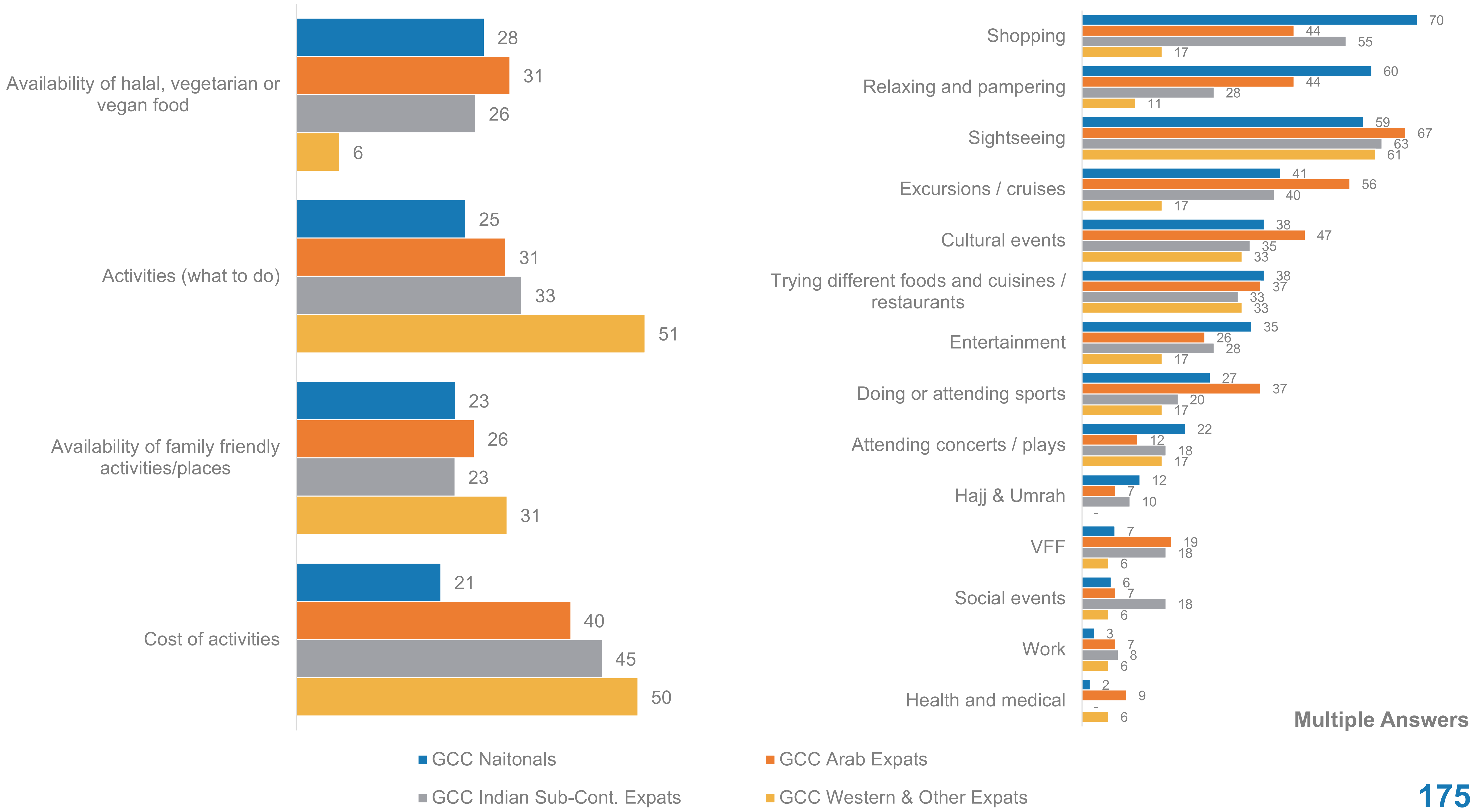


Transportation

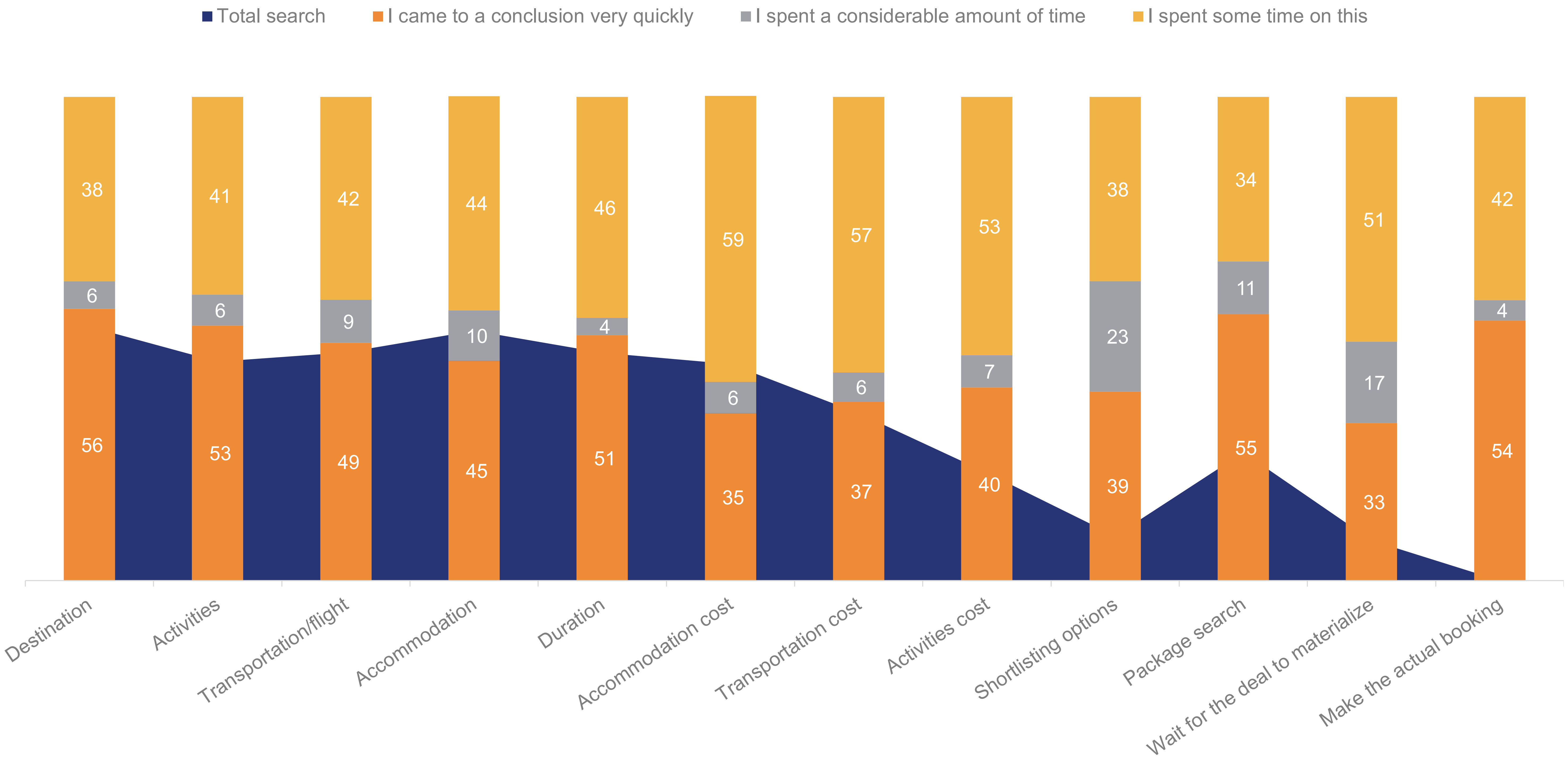


Multiple Answers

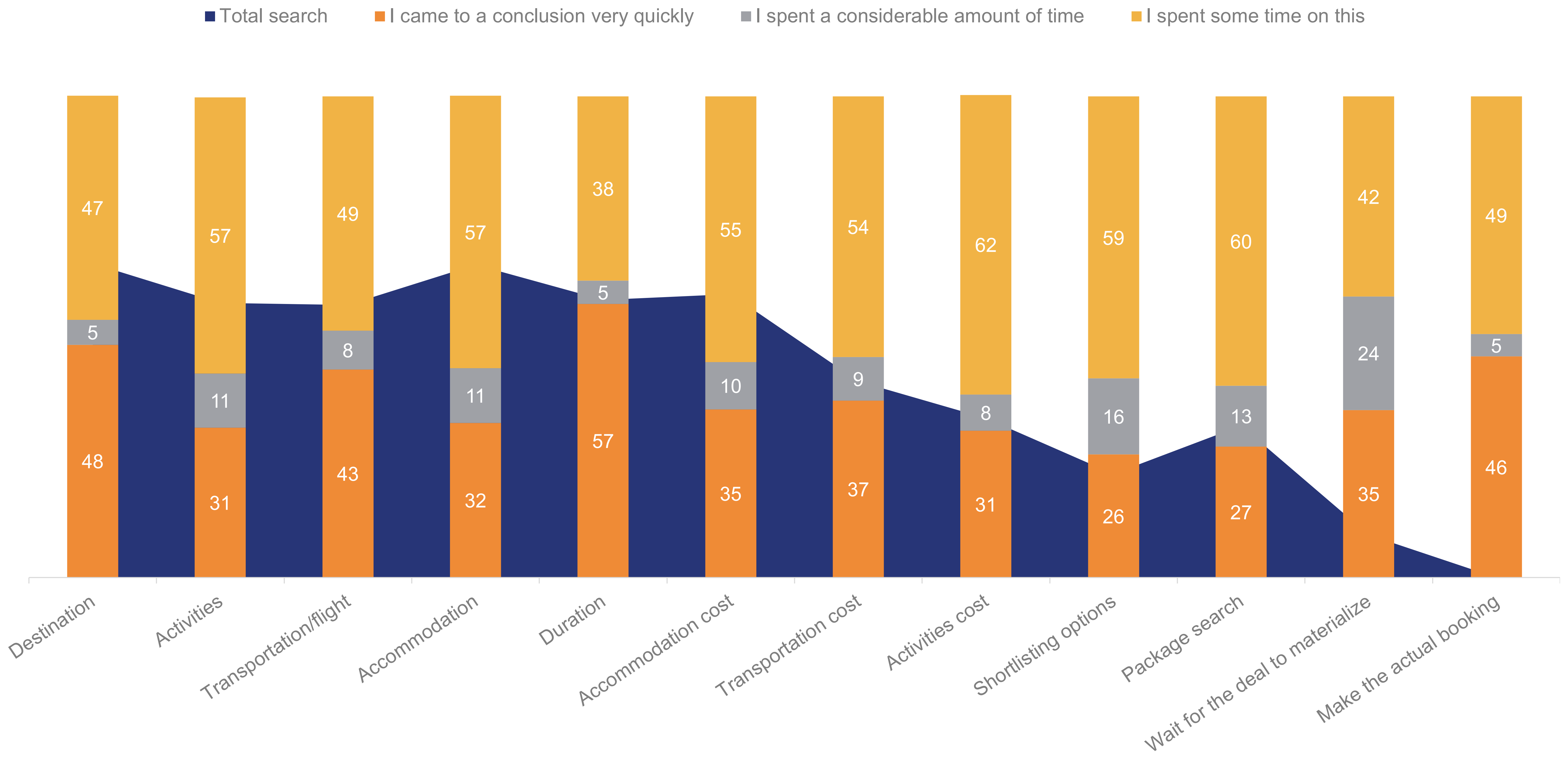
Activities Considerations



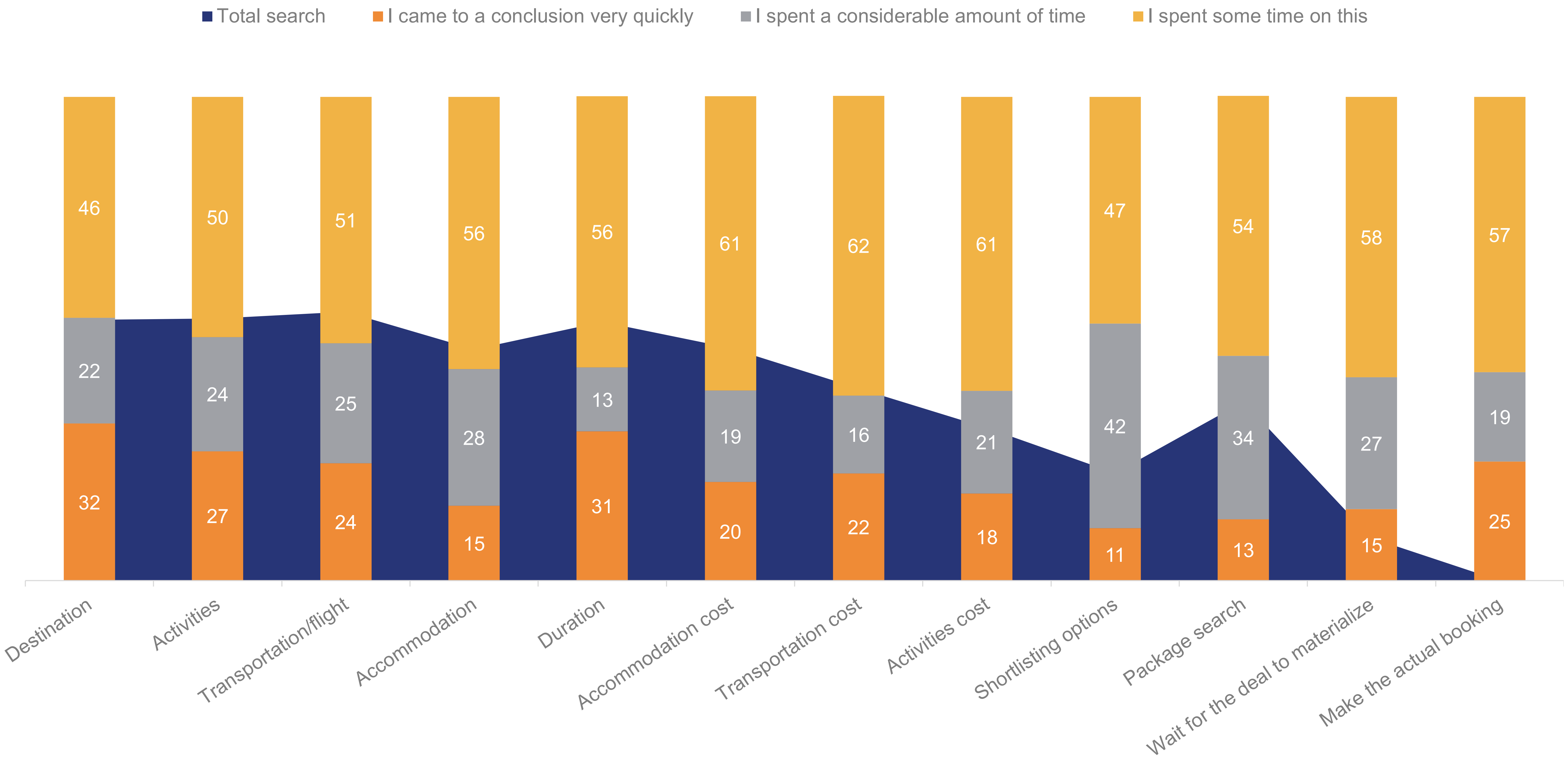
Search Cycle vs. Time Spent (GCC Nationals)



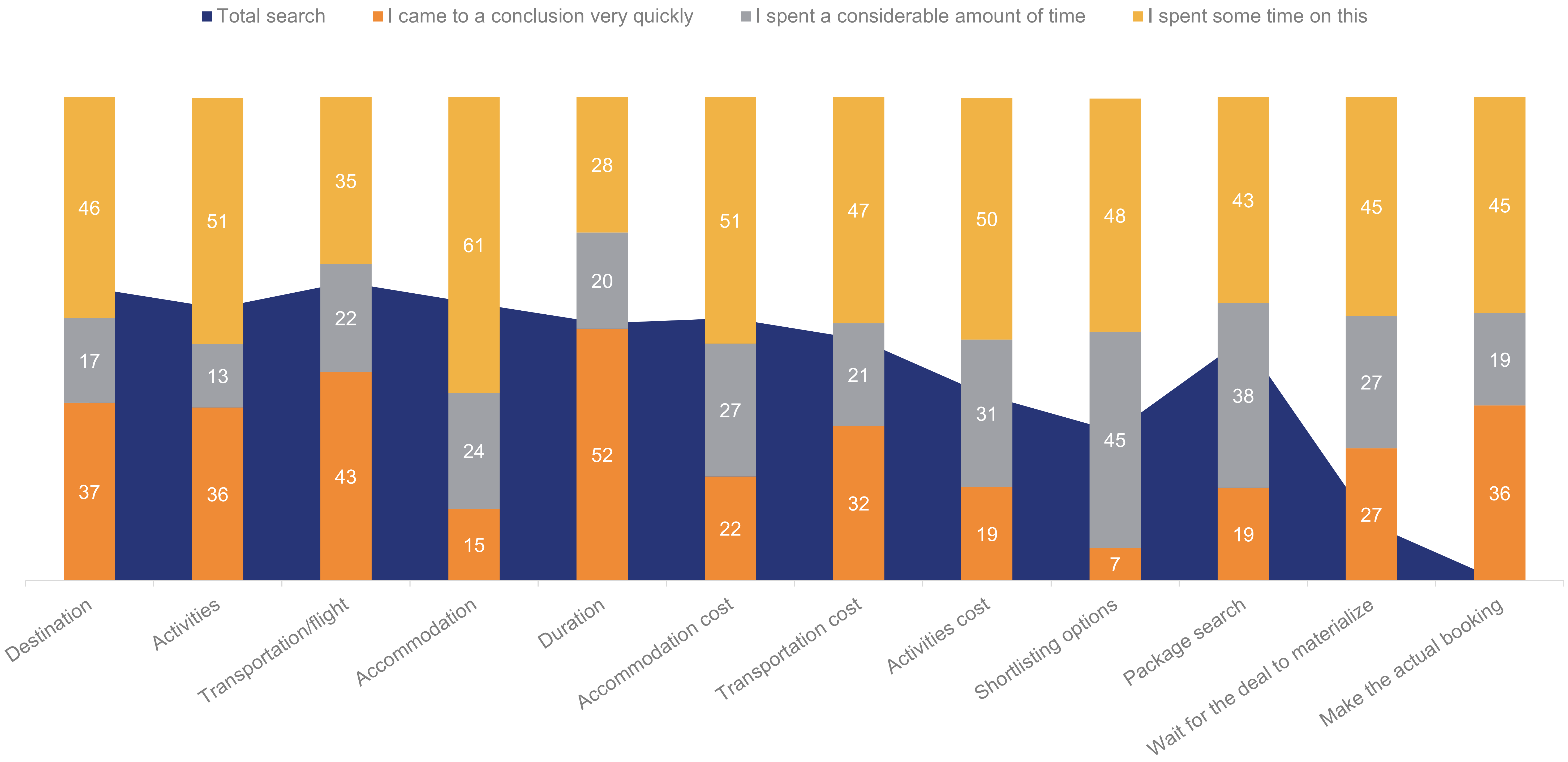
Search Cycle vs. Time Spent (GCC Arab Expats)



Search Cycle vs. Time Spent (GCC Indian Sub-Cont. Expats)



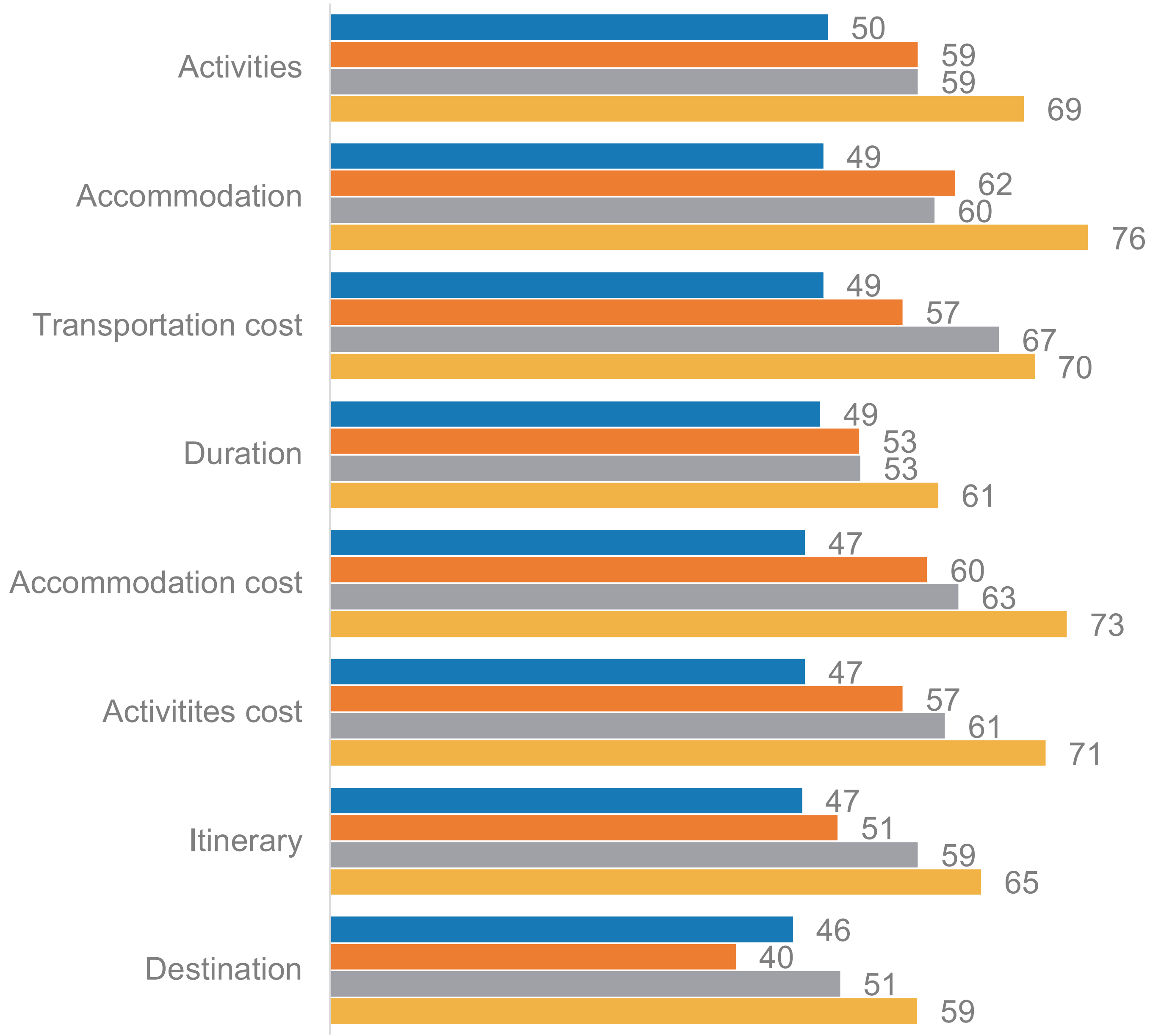
Search Cycle vs. Time Spent (GCC Western & Other Expats)



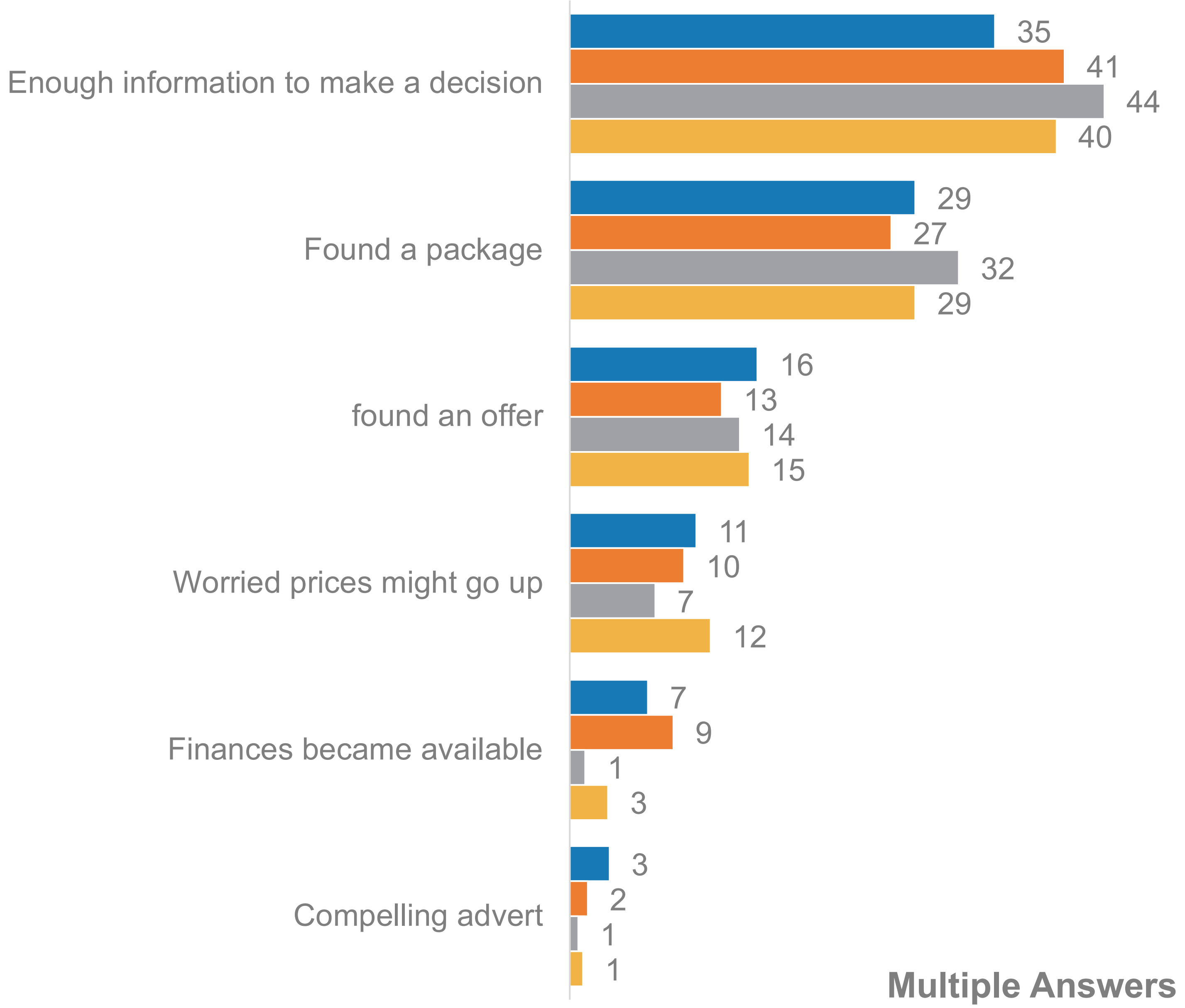
Reconsideration vs. Commitment

Change of mind

(during the process of search)



Trigger for making the booking

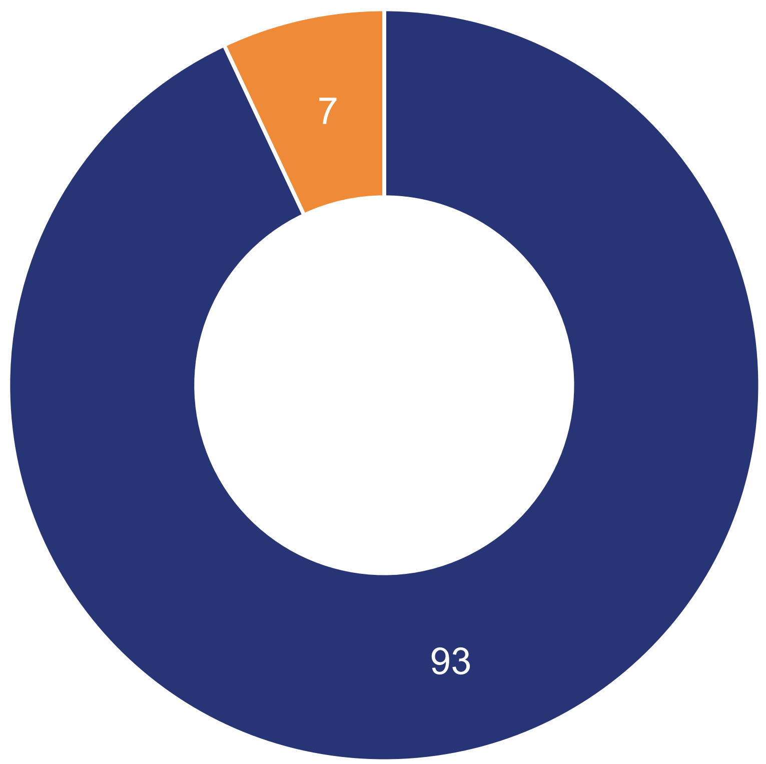


Multiple Answers

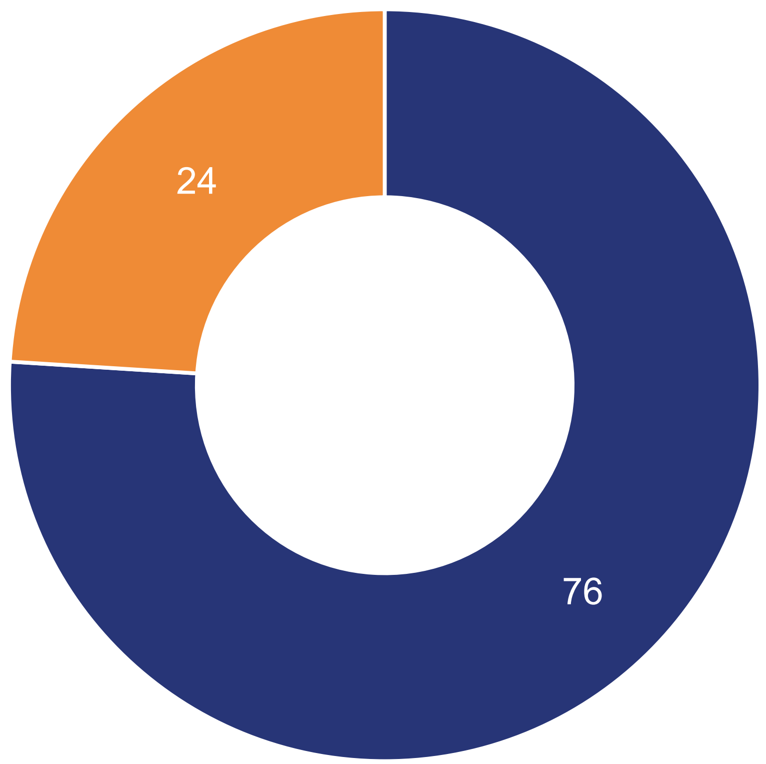
GCC Naitonals
GCC Arab Expats
GCC Indian Sub-Cont. Expats
GCC Western & Other Expats

Leisure Travel… How?

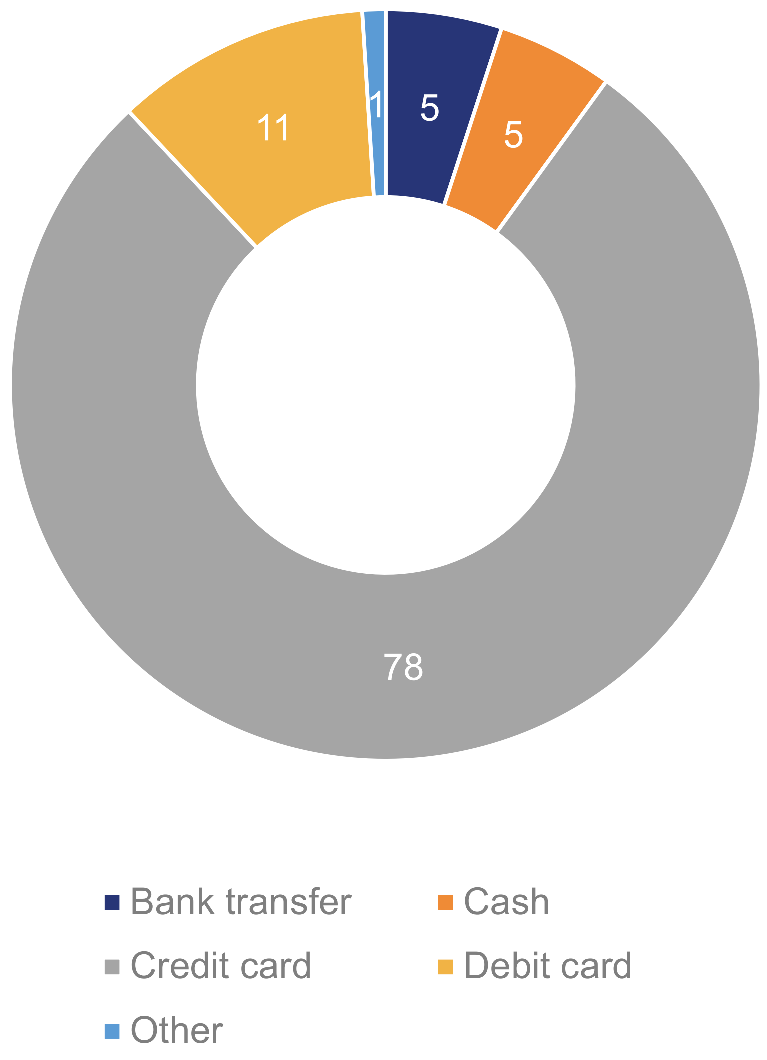
Search



Book

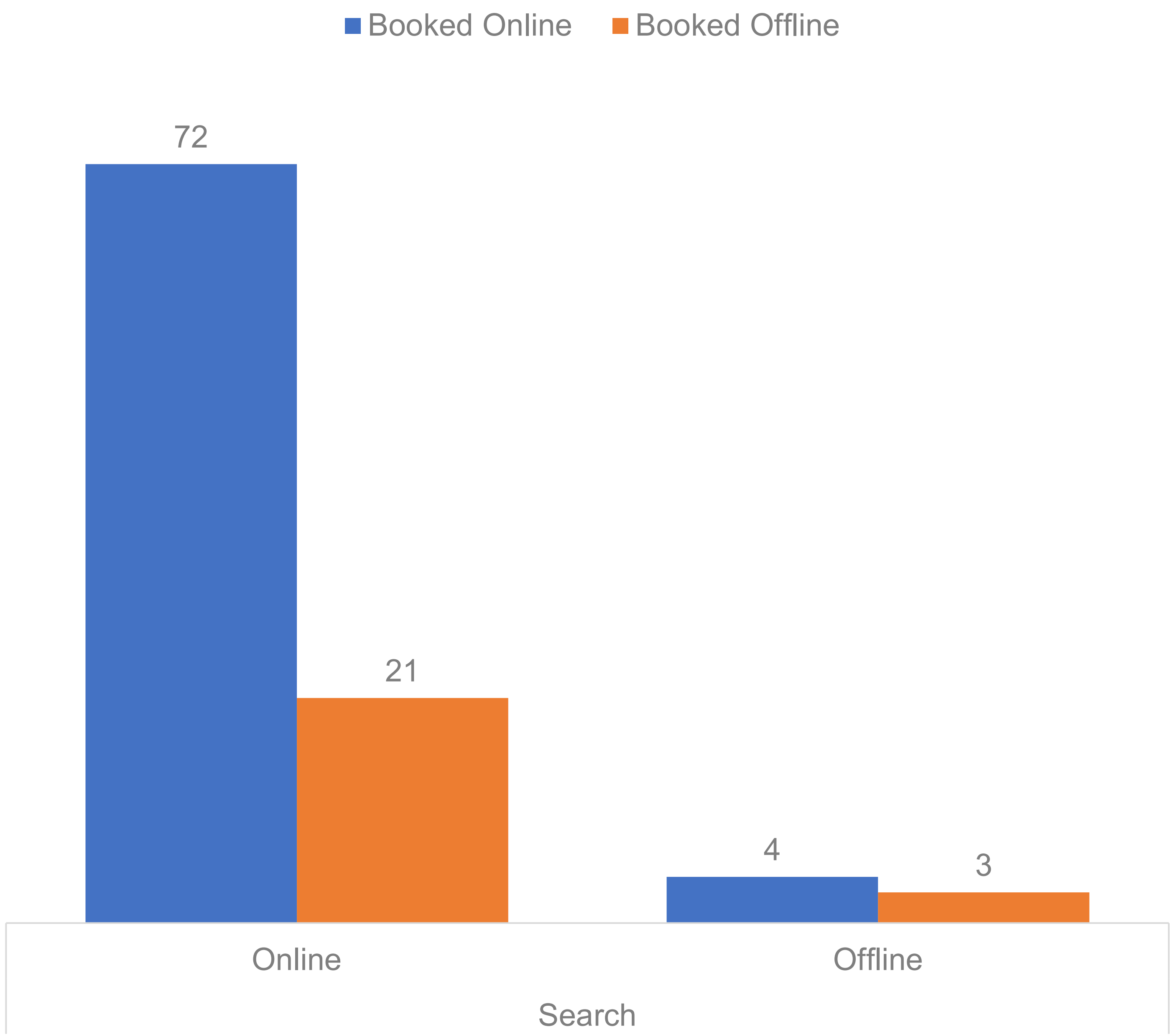


Pay



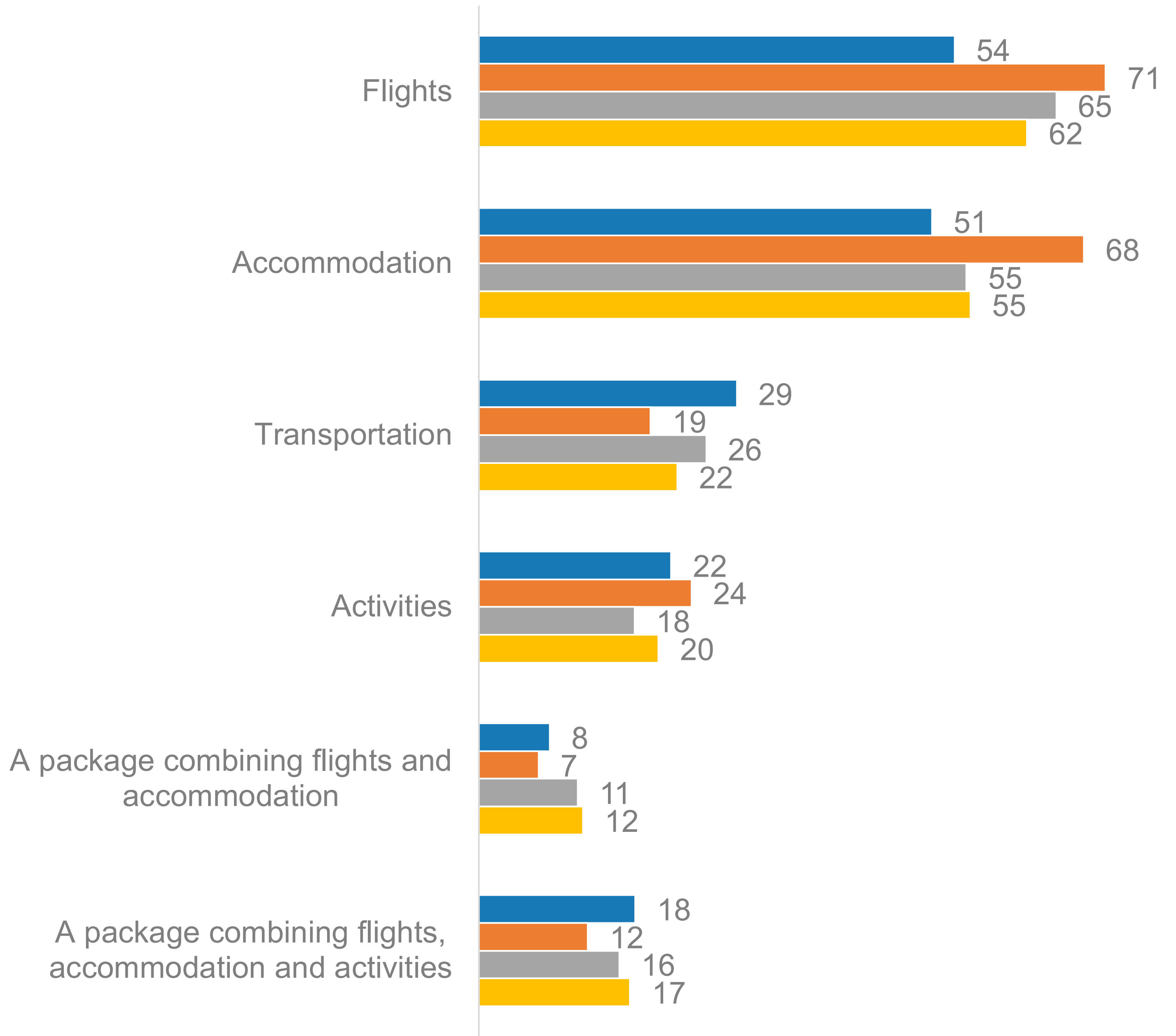
Search & Booking – Online vs. Offline

- Online savvy with 93% of search conducted online
- 72% is booked online, mainly for hotel and air, packages are booked online less frequently
- 21% of travel is still booked offline but mostly researched online
- Online search is used for shopping and comparing prices and Trivago followed by Skyscanner leads in Meta

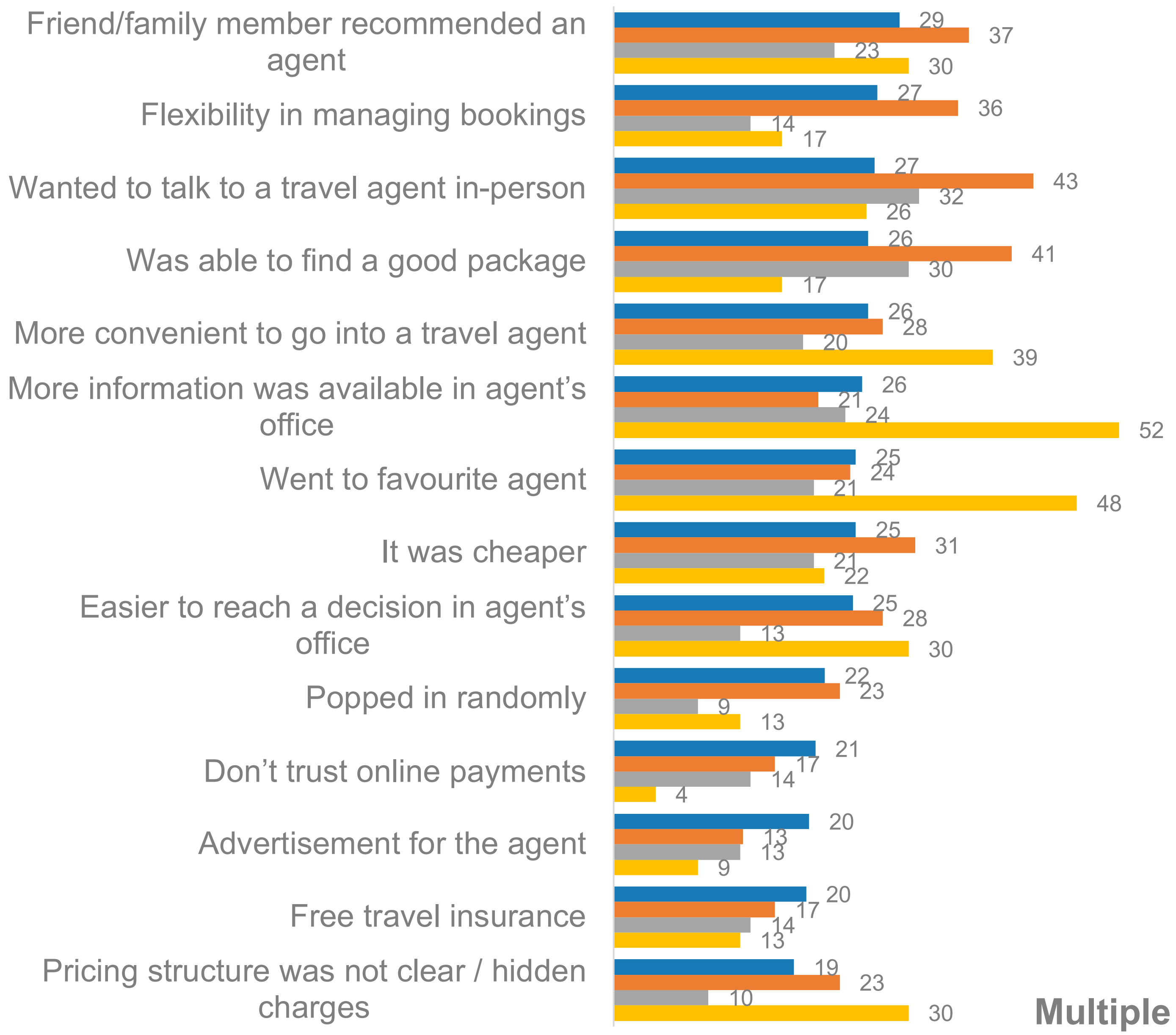


Actual Booking

Element booked



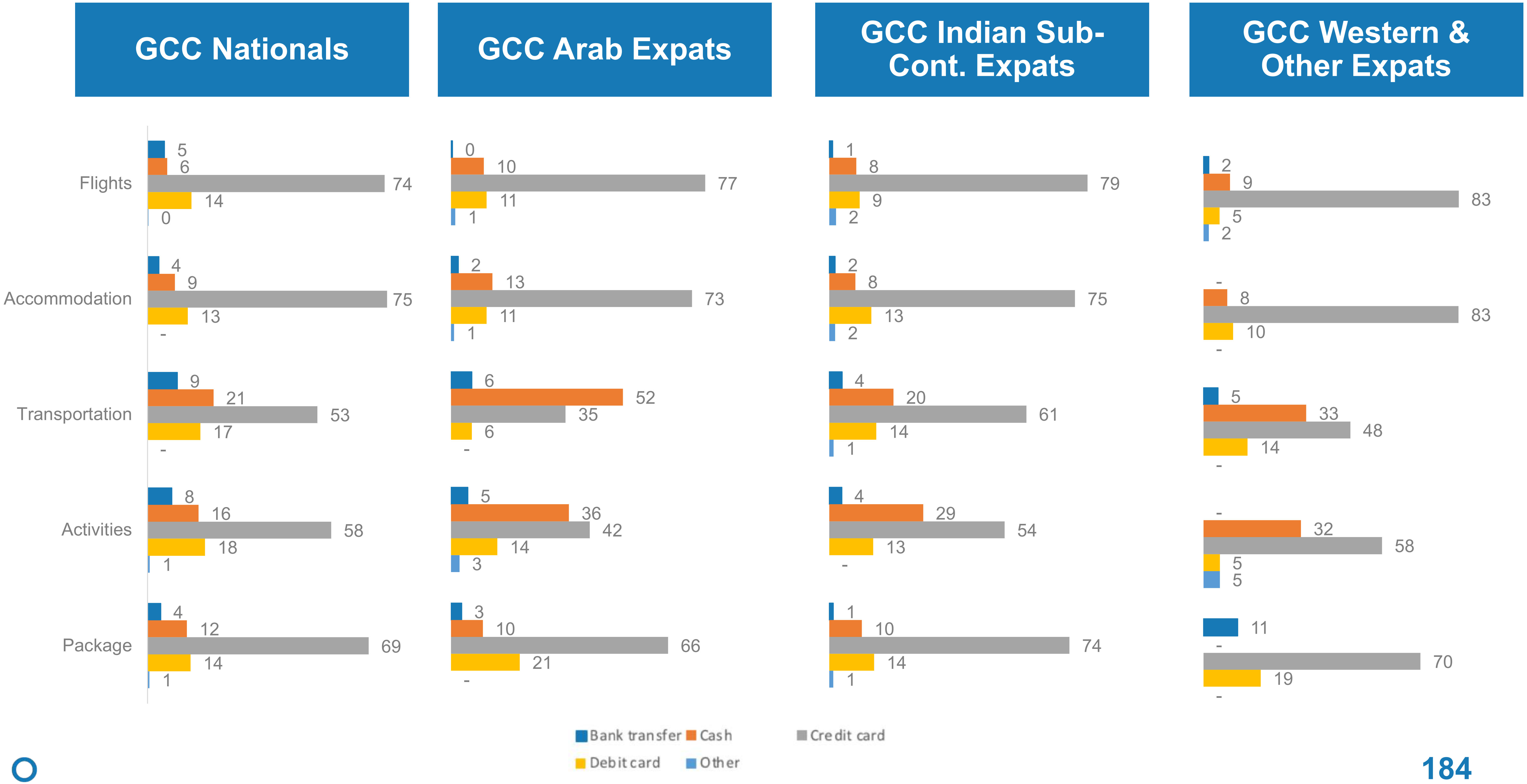
Searched online but booked offline



Multiple Answers

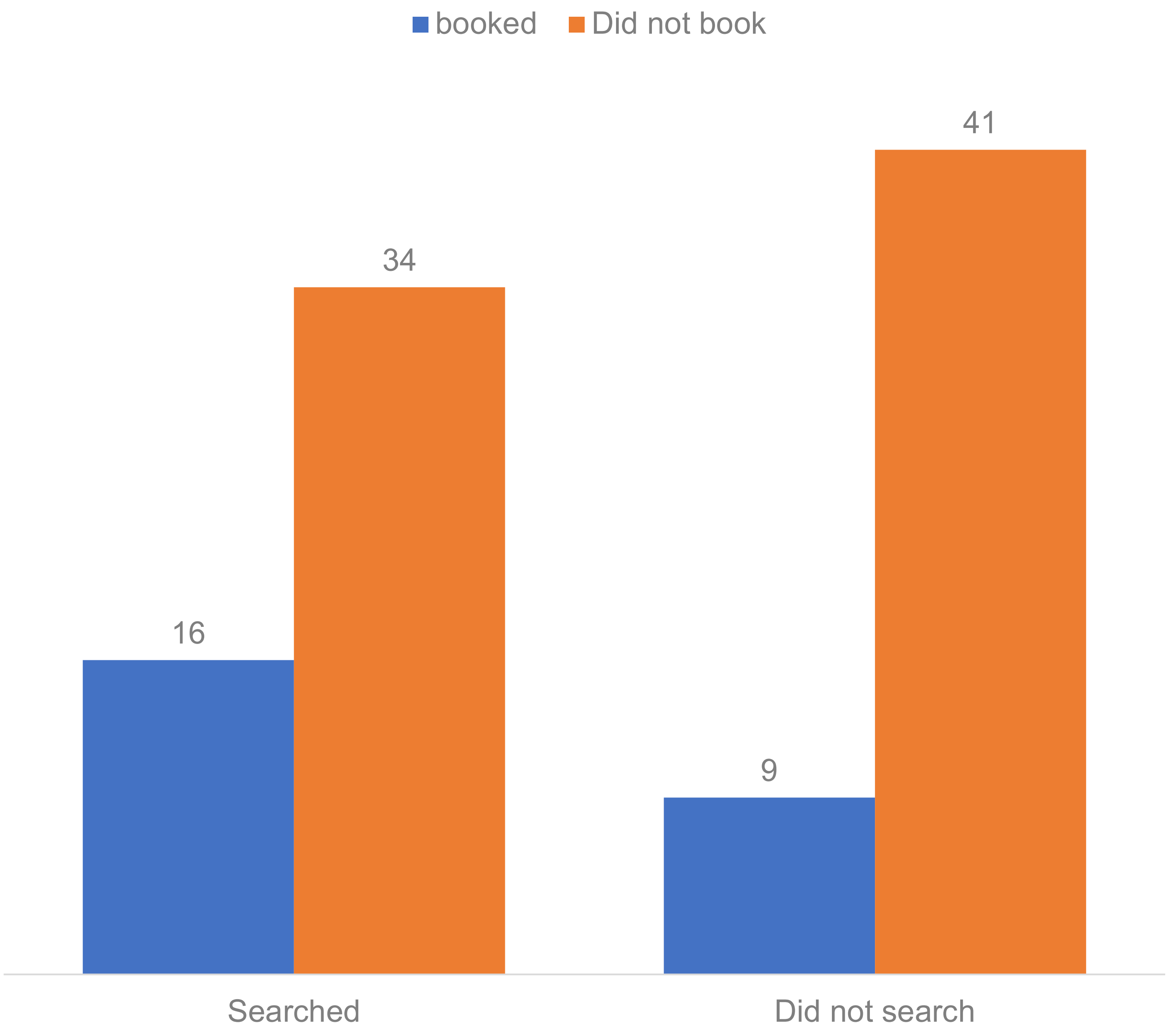
GCC Naitonals
GCC Arab Expats
GCC Indian Sub-Cont. Expats
GCC Western & Other Expats

Payment Method for Booked Elements



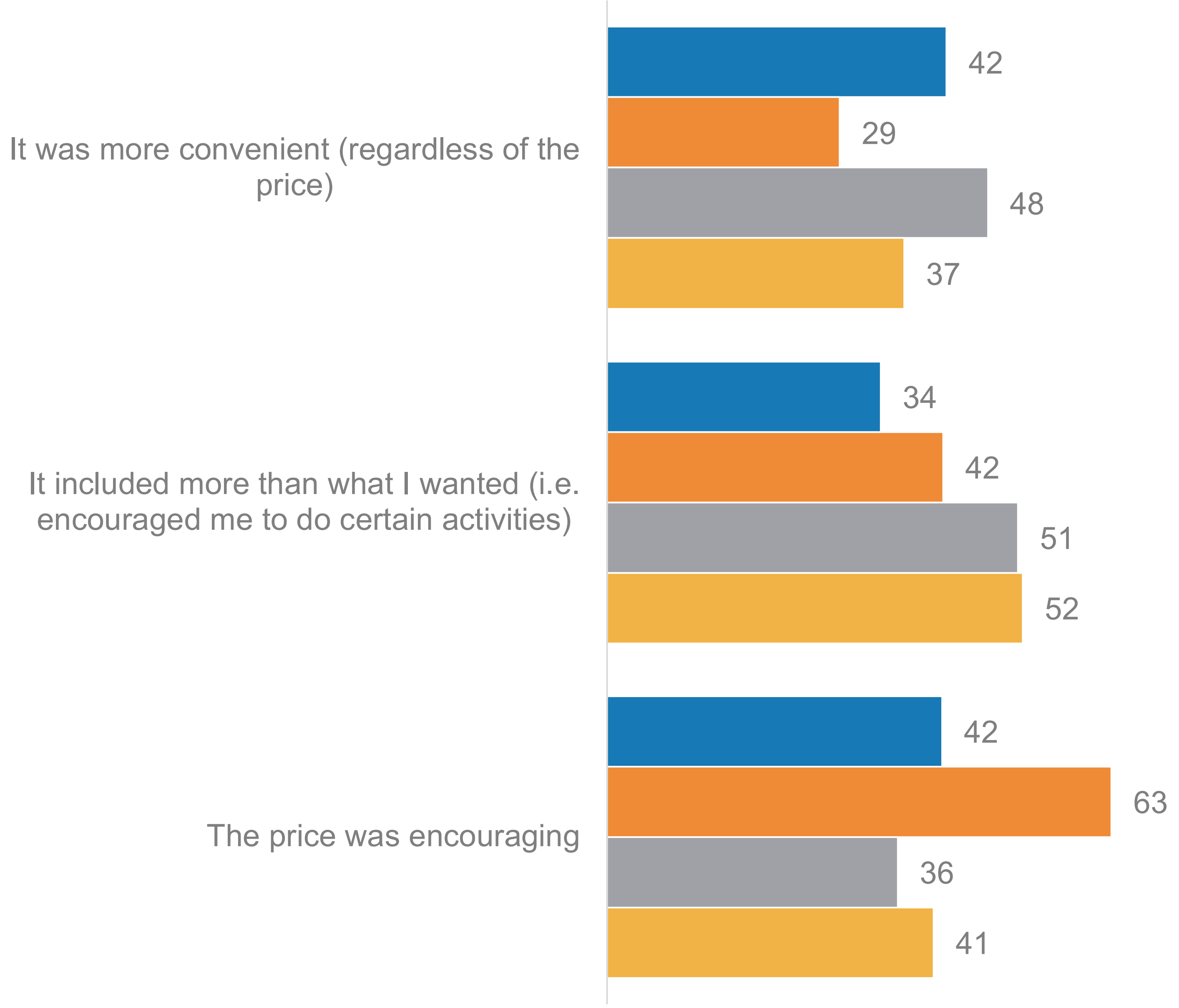
Package Search vs. Booking

- Market for packages at 59% (booked &/or shared)
- 55% of GCC Nationals felt the Package components were too many
- Add on activities are what encouraged respectively 51% and 52% of the GCC Indian Subcontinent and GCC Western & Others expats of to book
- Sightseeing, shopping and pampering self is what GCC Nationals traveller mostly seek while GCC Western & Other expats appear to be foodies focused on site-seeing and cultural events

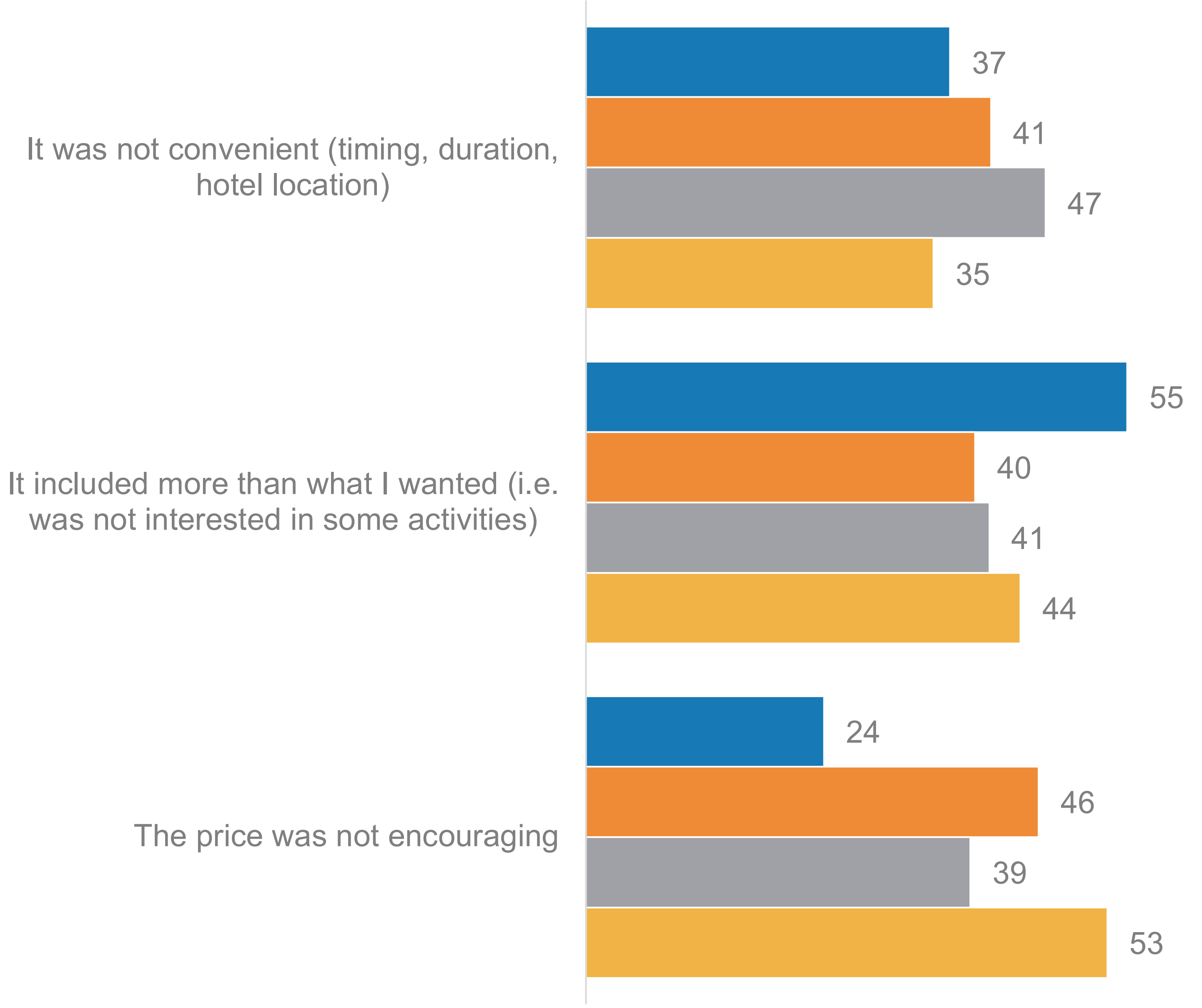


Choosing Packages

… to Package



… not to Package

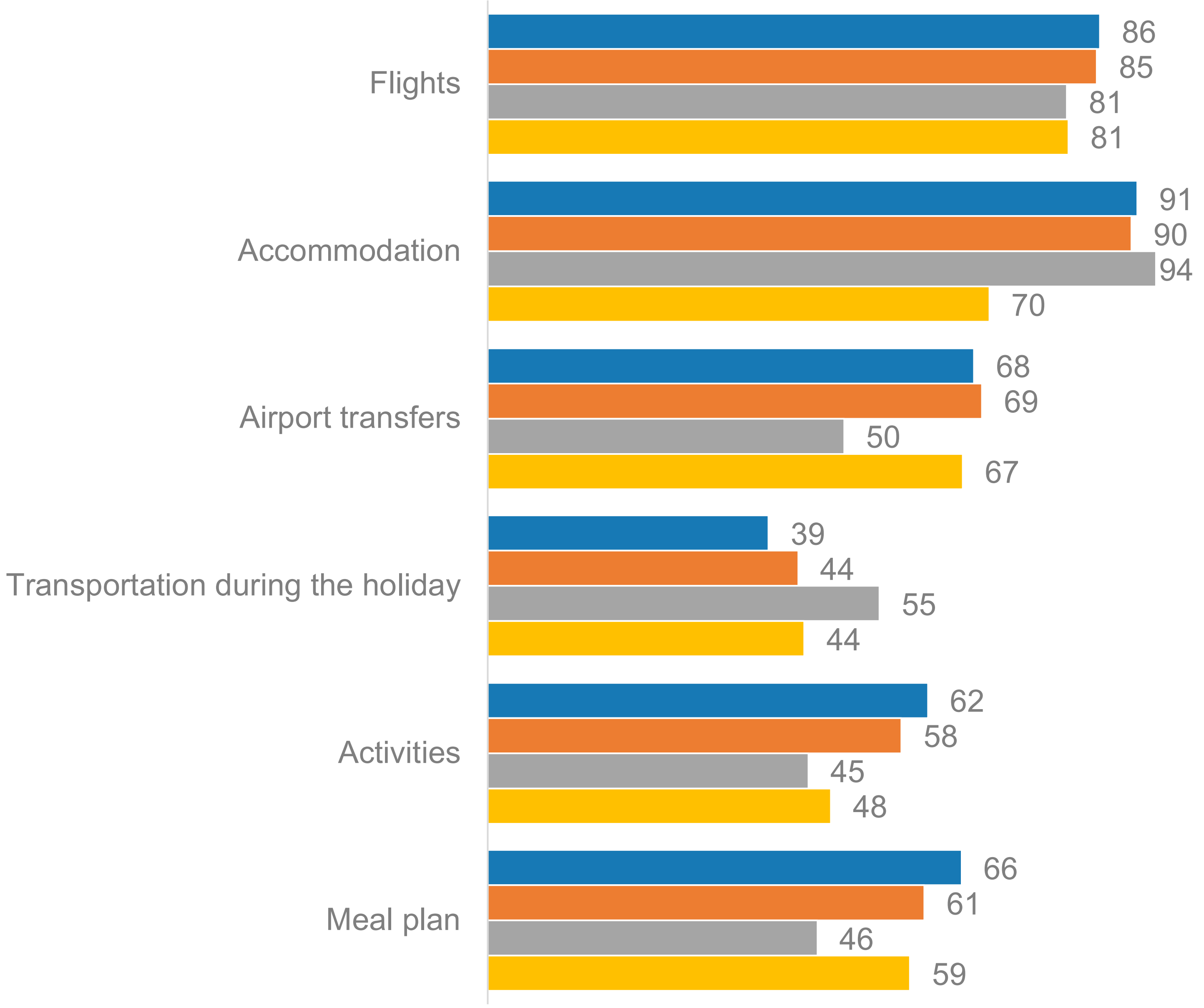


Multiple Answers

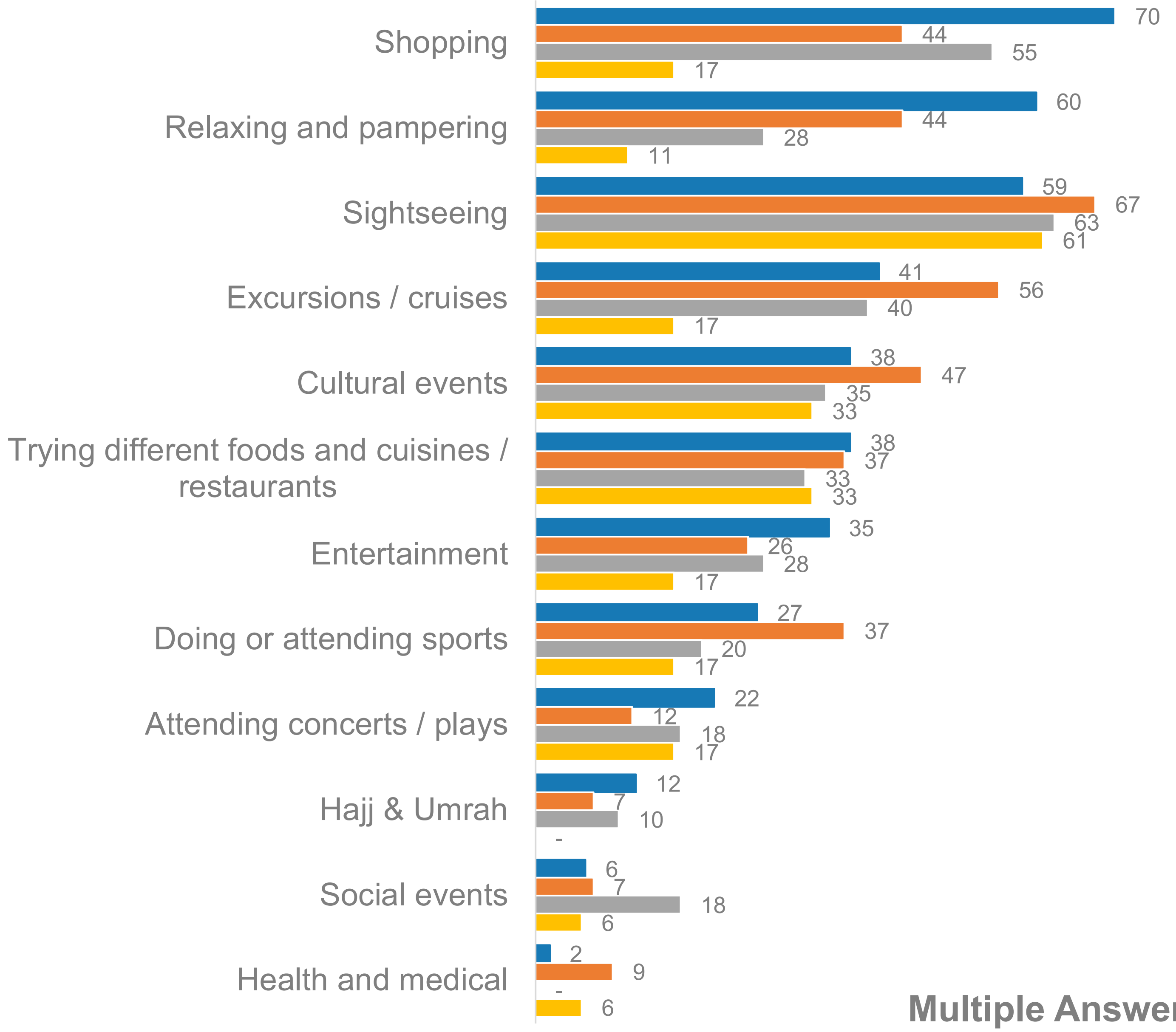
■ GCC Naitonals ■ GCC Arab Expats
■ GCC Indian Sub-Cont. Expats ■ GCC Western & Other Expats

Package Components

Components



Activities

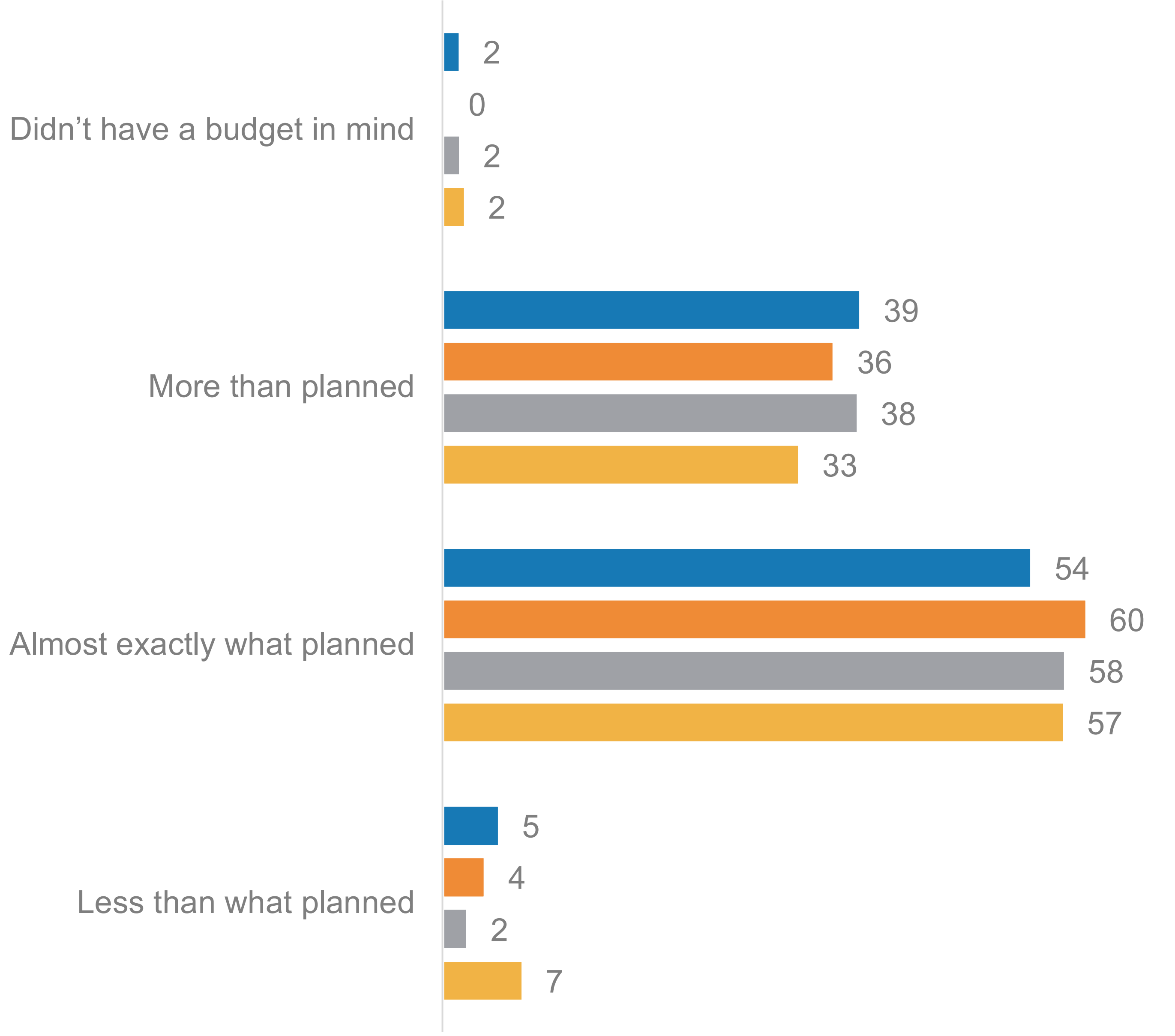


Multiple Answers

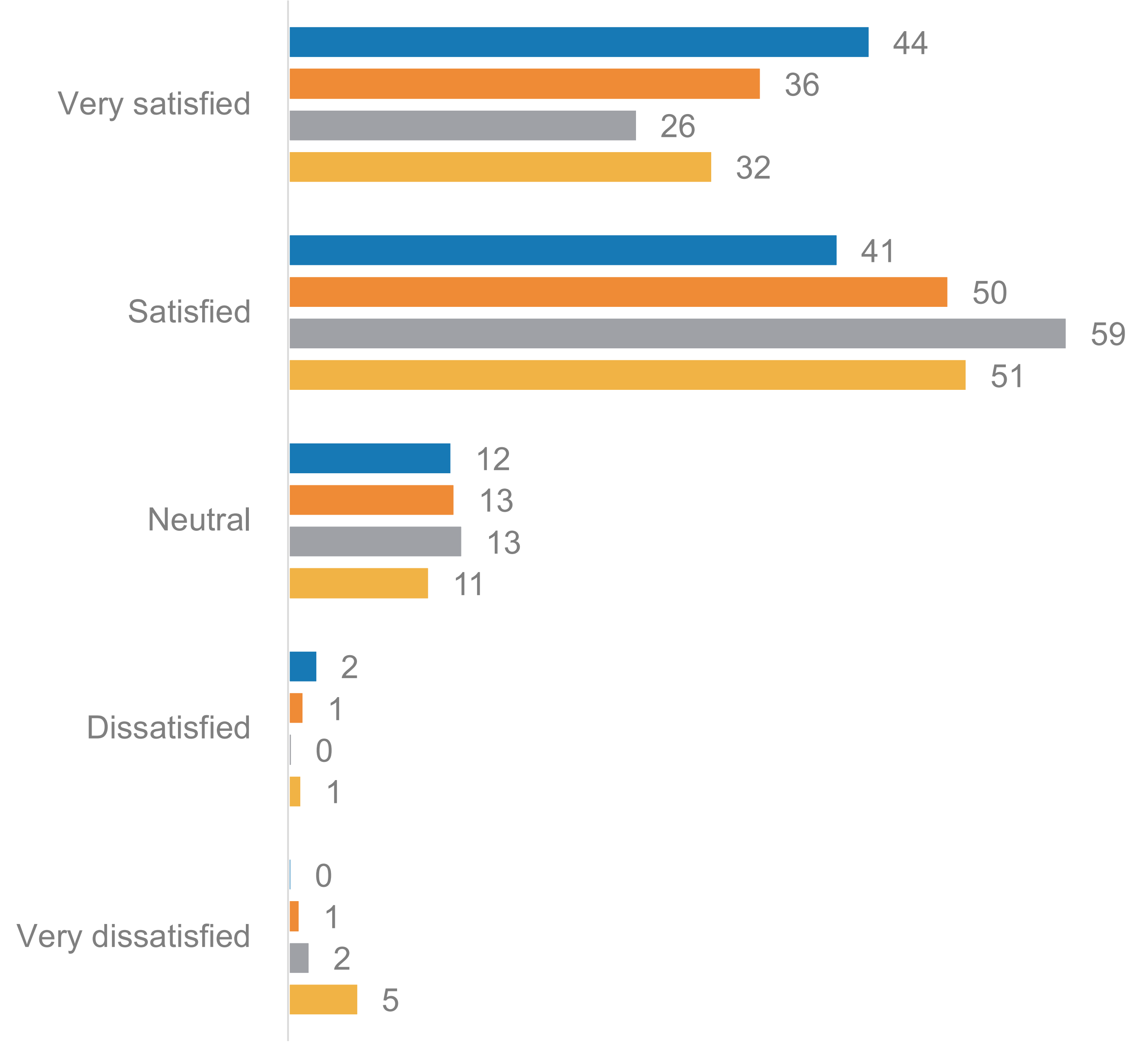
- GCC Naitonals
- GCC Arab Expats
- GCC Indian Sub-Cont. Expats
- GCC Western & Other Expats

Post-Booking

Amount Spent



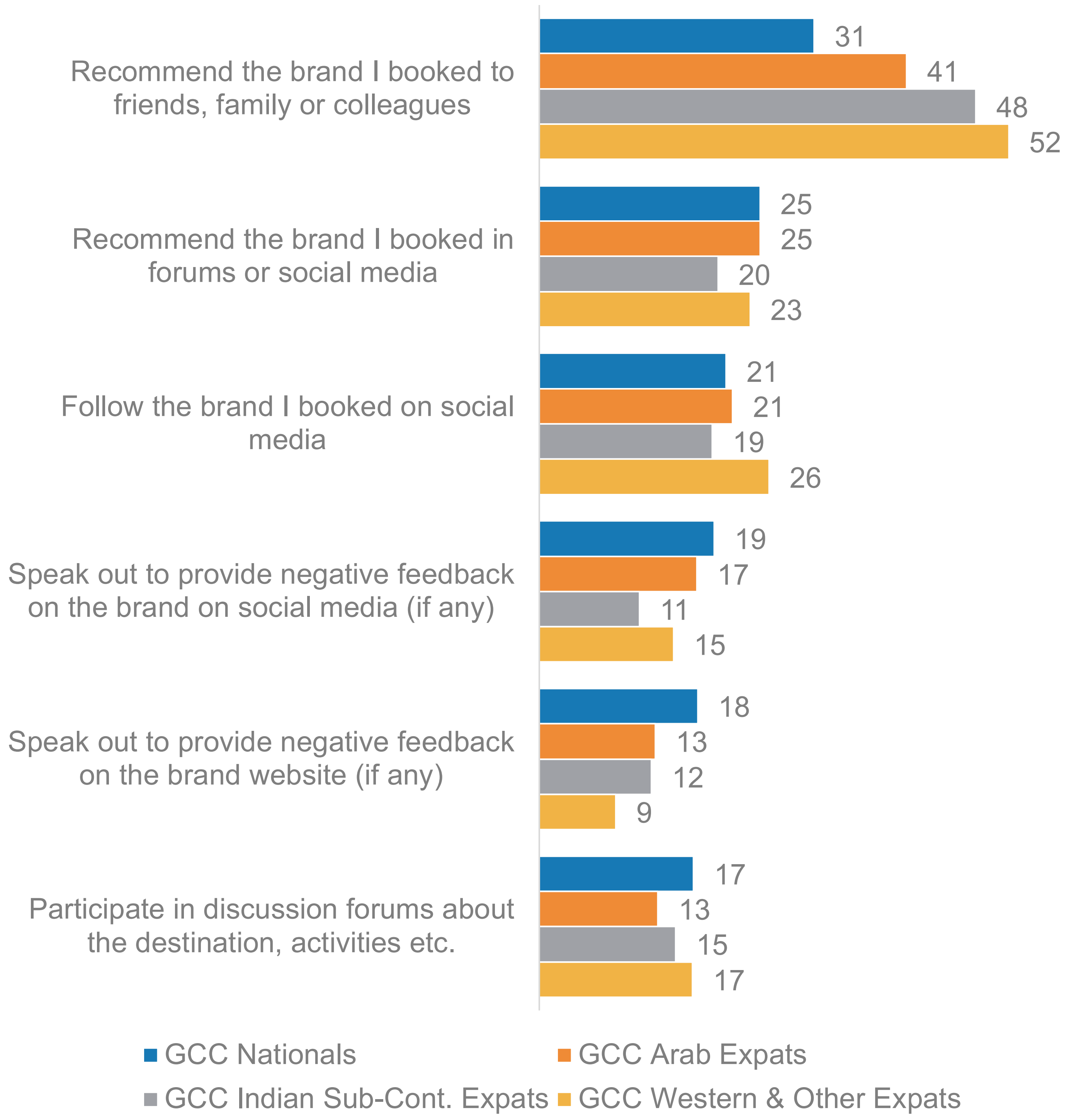
General Satisfaction with the leisure booking



GCC Naitonals
GCC Arab Expats
GCC Indian Sub-Cont. Expats
GCC Western & Other Expats

Experience & Sharing

- Indian Subcontinent expats (48%) and Westerns/Other Expats (52%) are more likely to make recommendations post trip to their FF&C
- Arab Expats and GCC Nationals are more likely than the other sub groups to make recommendations through Social media



Multiple Answers

I | O

Business Travel

Pattern

How?

Who?

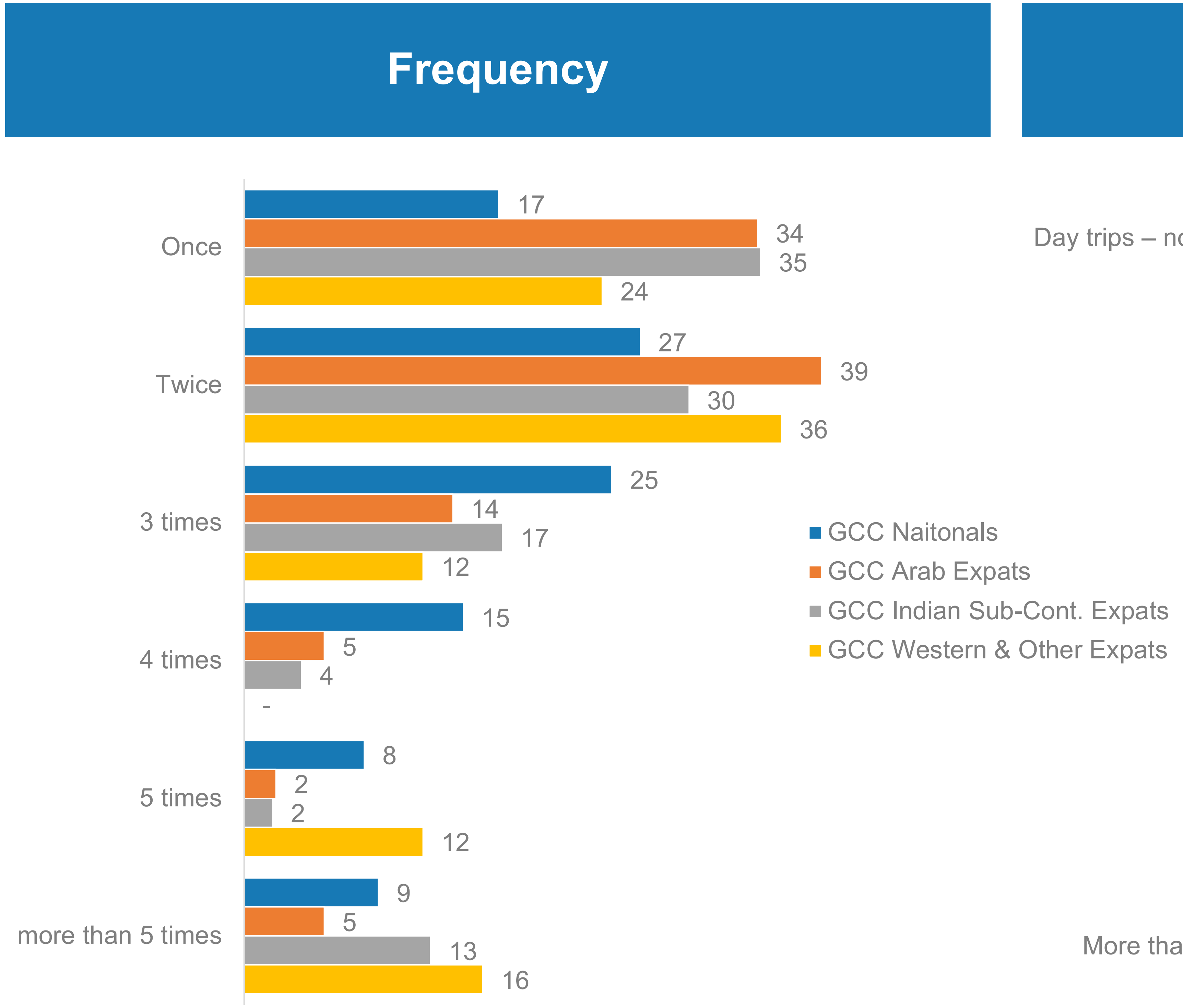
Highlights Emerging from Study

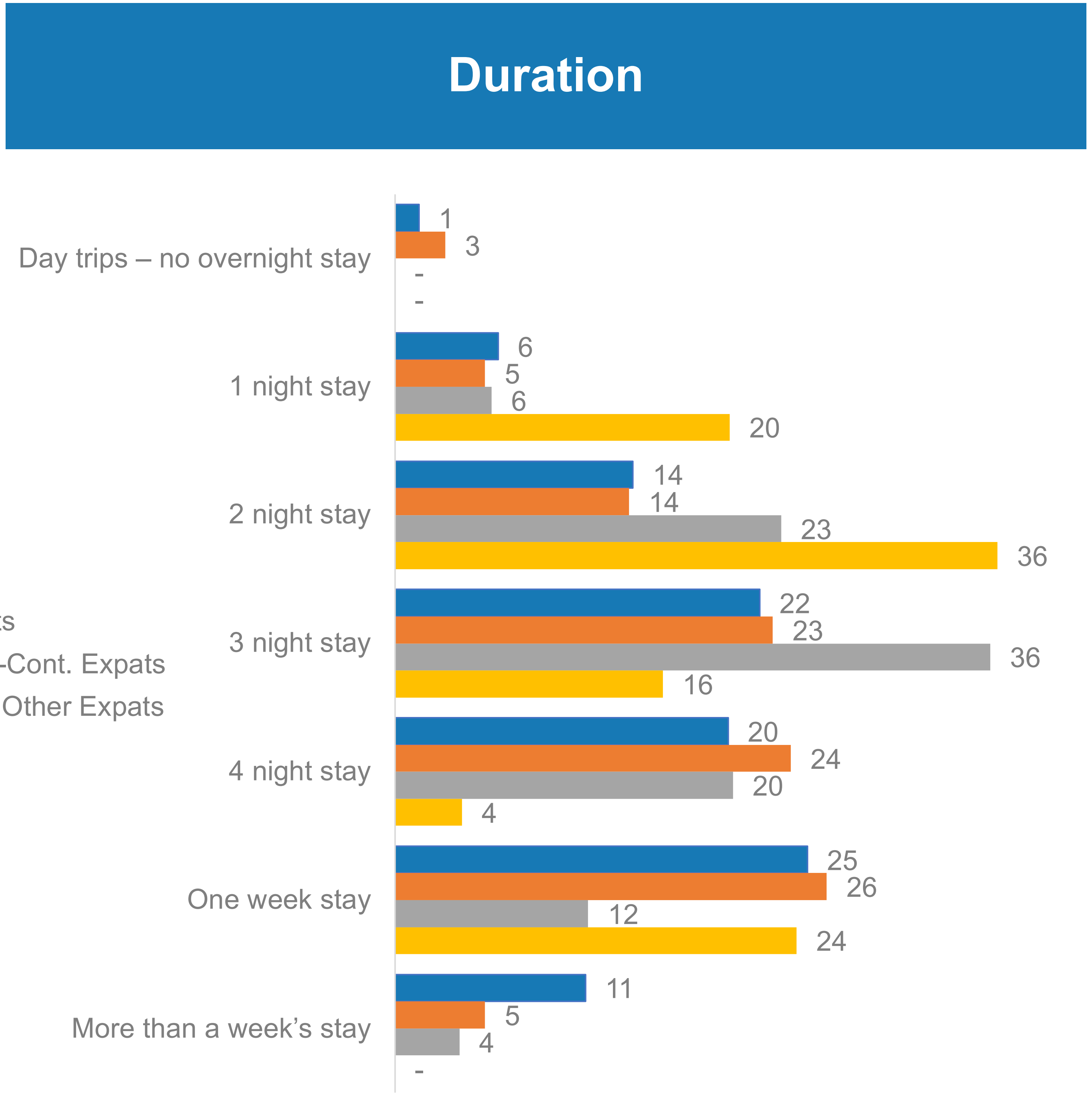
- Despite some differences for each Subgroups, most of the business travel is once or twice a year. 56% of business travel has extended length of stay of 4-7 nights

- Online is still key for search for all GCC Subgroups (from 68% to 77%) , but of less of importance for booking (from 60% to 68%)

- Following regional trends, 27% to 31% of business travel is booked by company and travel agents but 55% to 64% is booked by the traveller directly

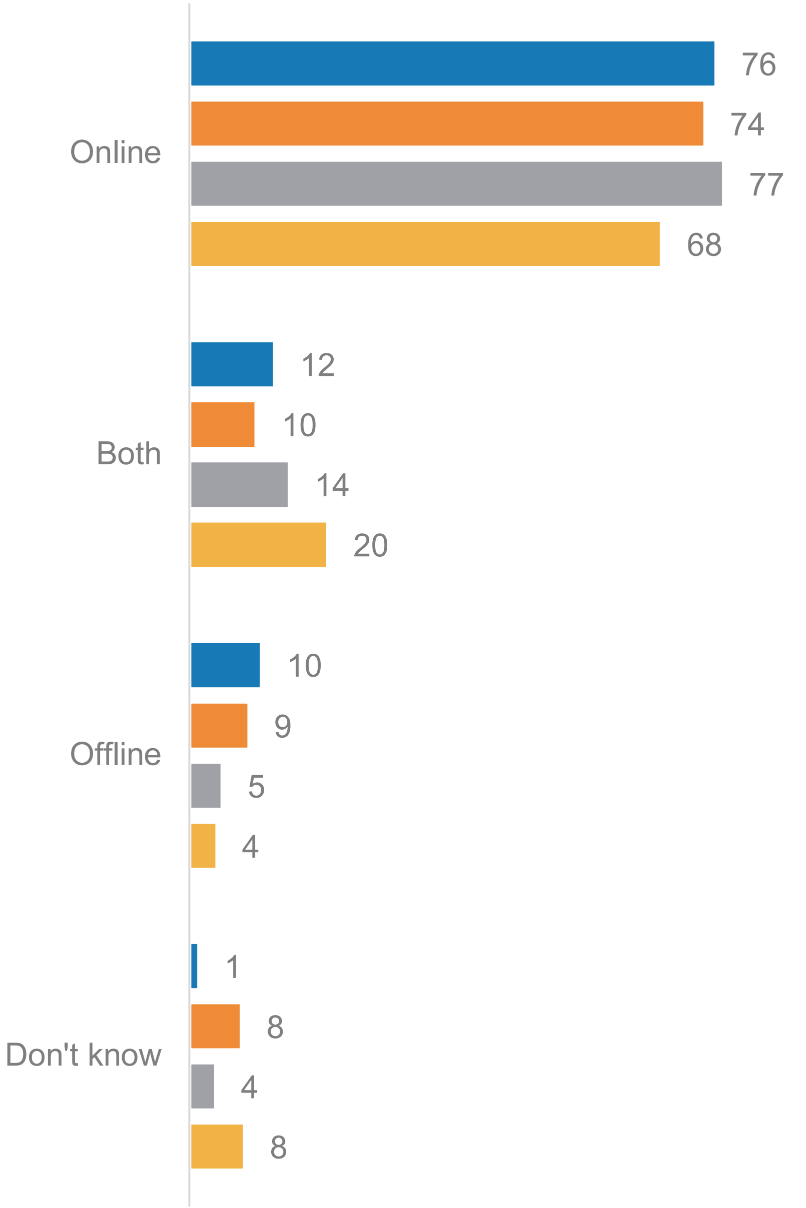
Business Travel



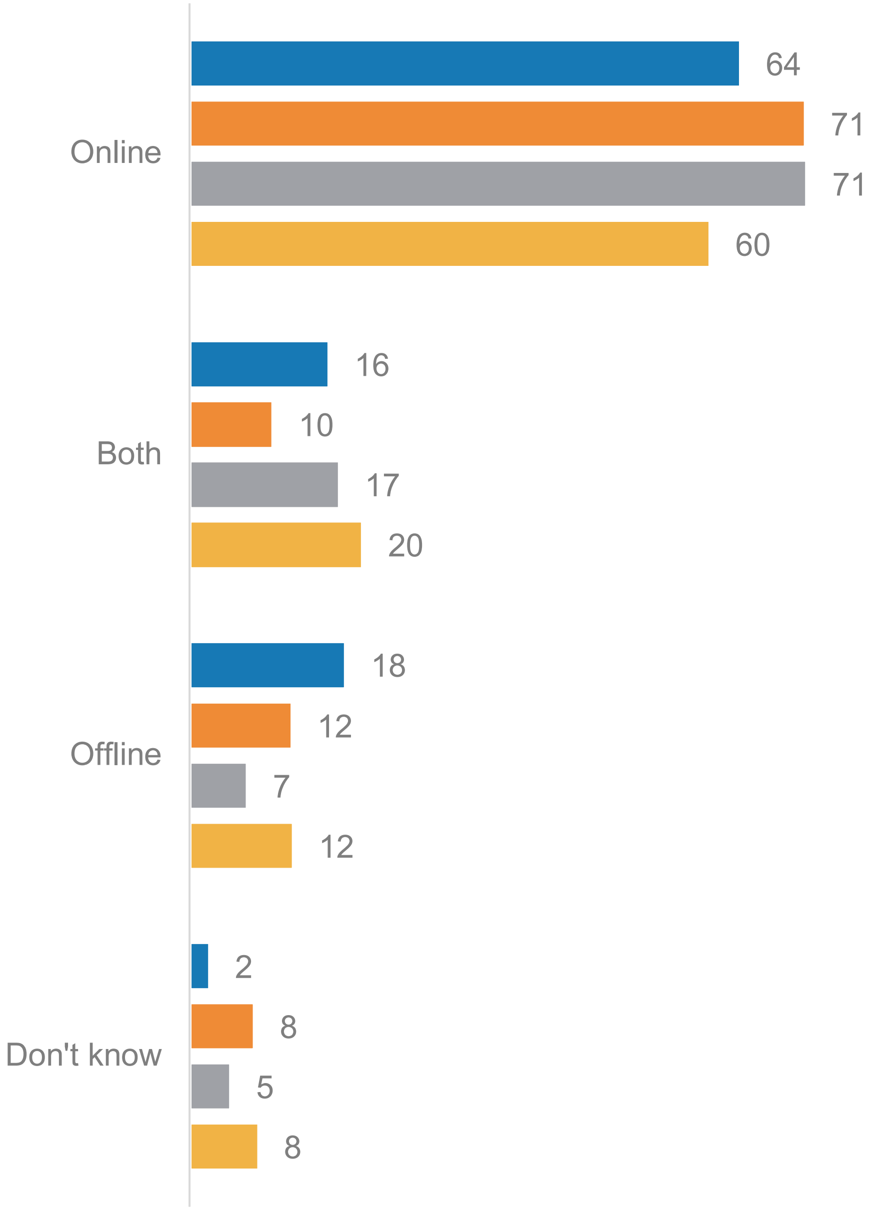


Business Travel… How?

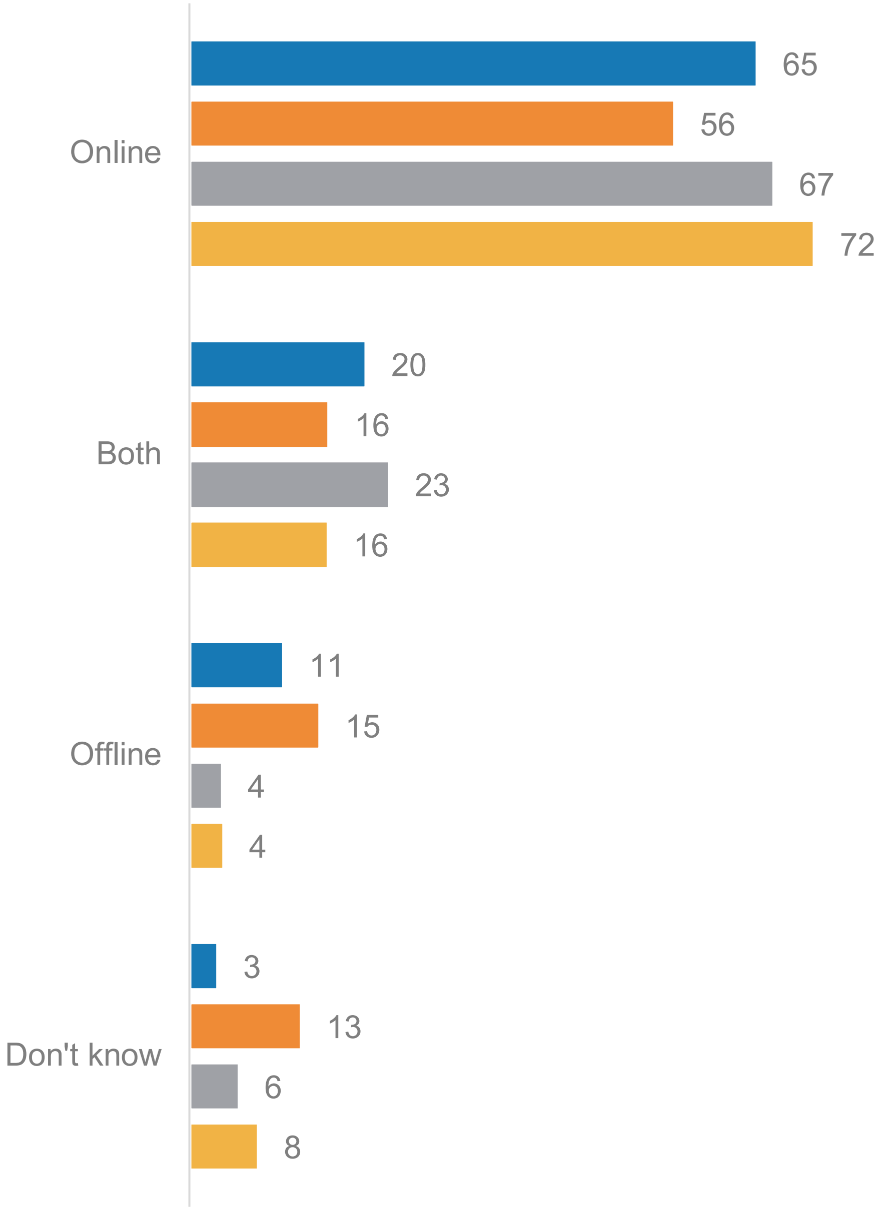
Search



Book



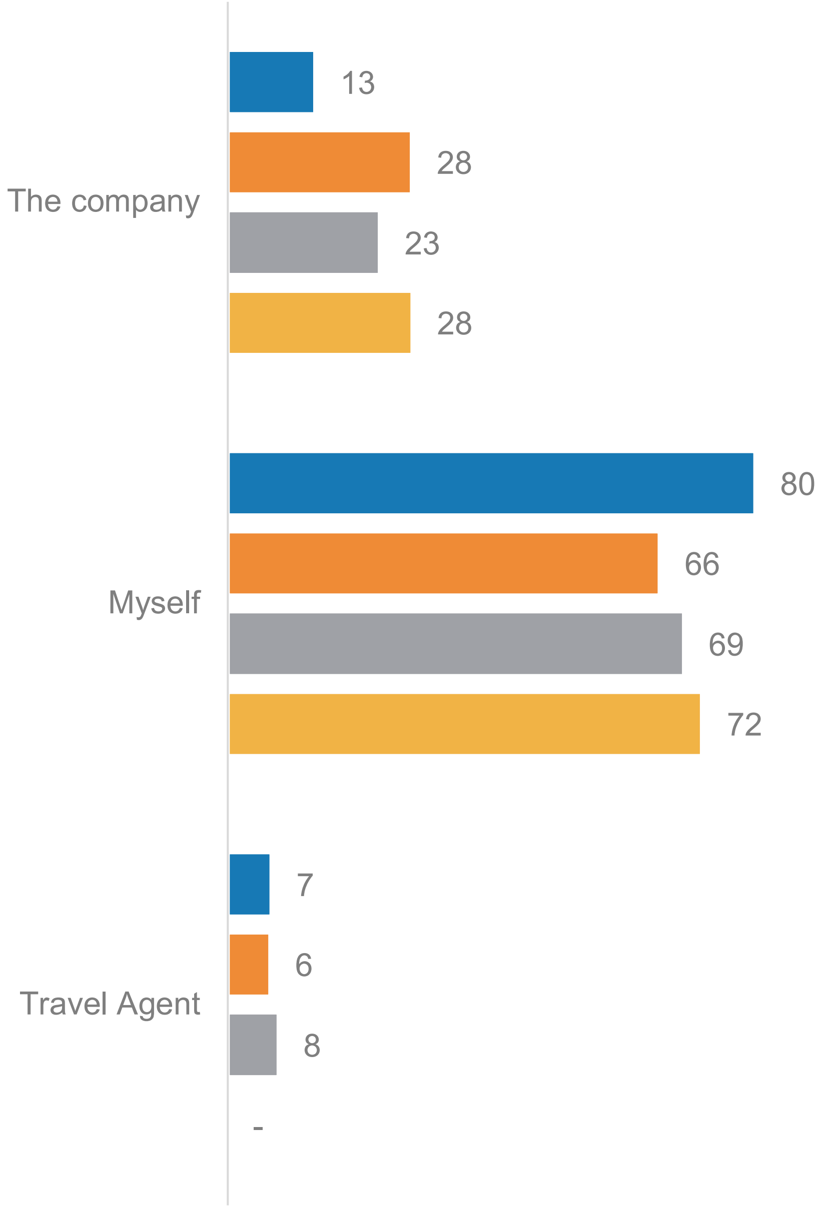
Pay



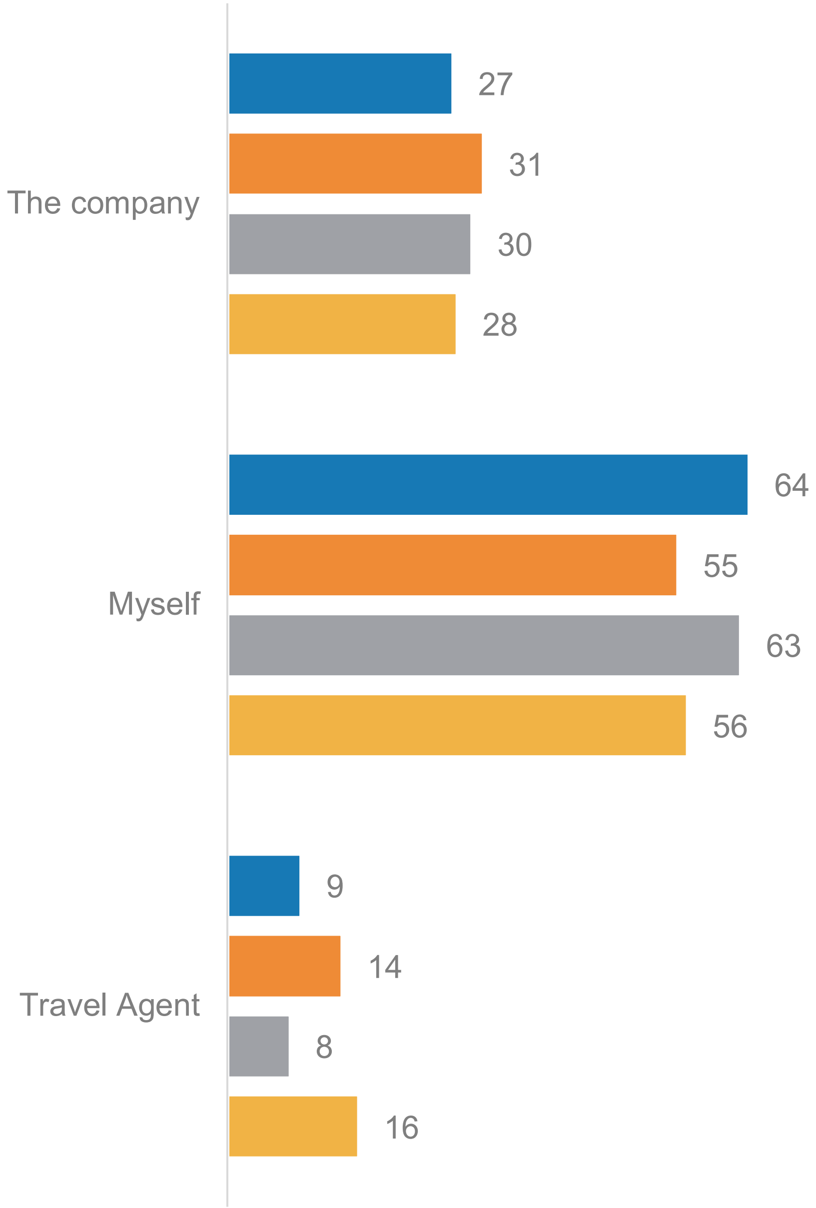
■ GCC Naitonals ■ GCC Arab Expats
■ GCC Indian Sub-Cont. Expats ■ GCC Western & Other Expats

Business Travel… Who?

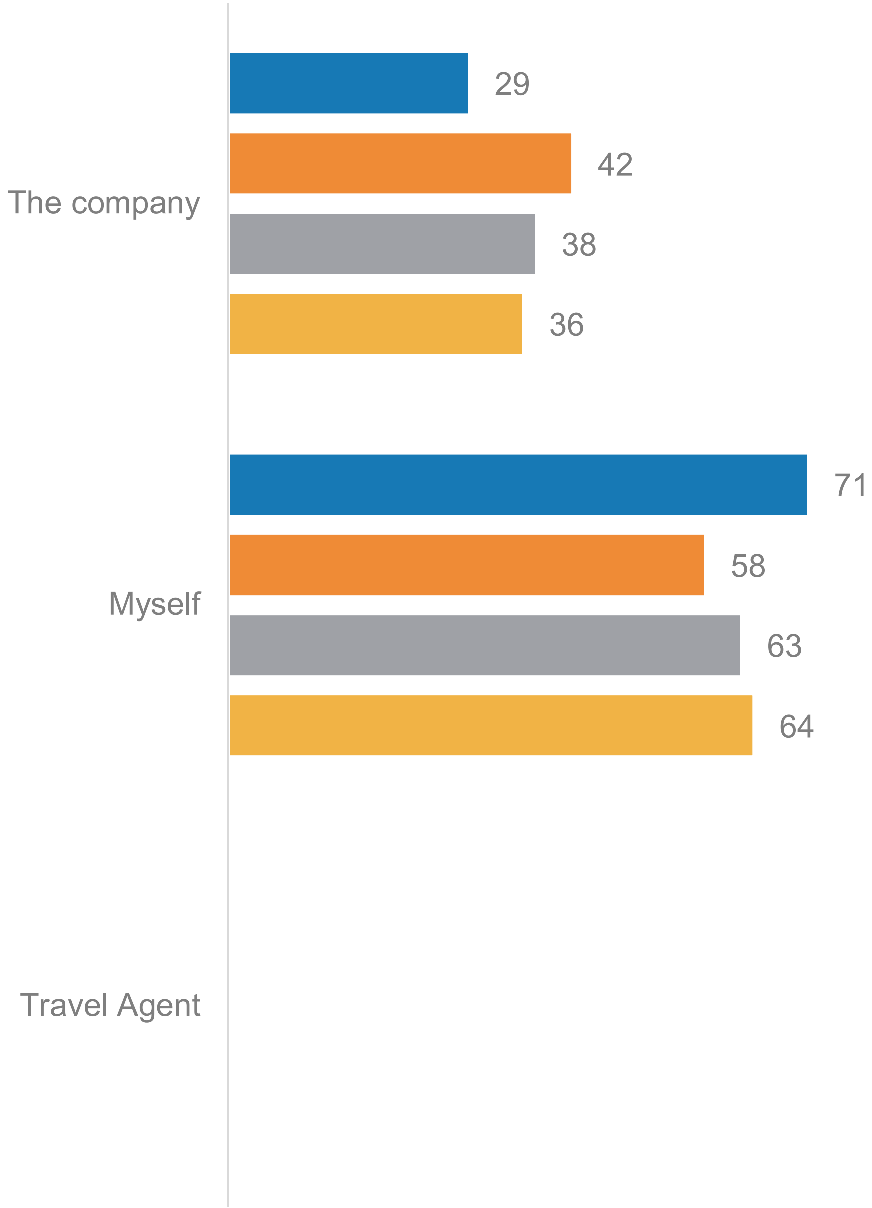
Search



Book



Pay



Levant

Key Findings

Sub-group specific charts

Key Findings - Levant

- 67% of Levant respondents are 21 to 40 years old
- 51% are married with children vs. 68% on the overall sample, while 34% are single (vs. 19% on the overall sample), which reflects in companionship
- They tend to travel less than the overall regional sample since **42%** travel only once a year vs. 31% on the overall, and **11%** travel 5+ times a year vs. 21% on the overall sample
- 70% of respondents shared travelling internationally compared to 64% at the regional level. 36% **went** to Europe
- They tend to be more open minded when it comes to travel than the regional sample (60% open vs. 52% at an overall sample level)

Total Population	**15.7M**
Male : Female	**50:50**
Internet Penetration	**70%**
Mobile Penetration	**68%**

Source:
Population: UN World Population Prospects: 2017 Revision
Internet: Internet World Stats 2017
Mobile: GSM Association 2016

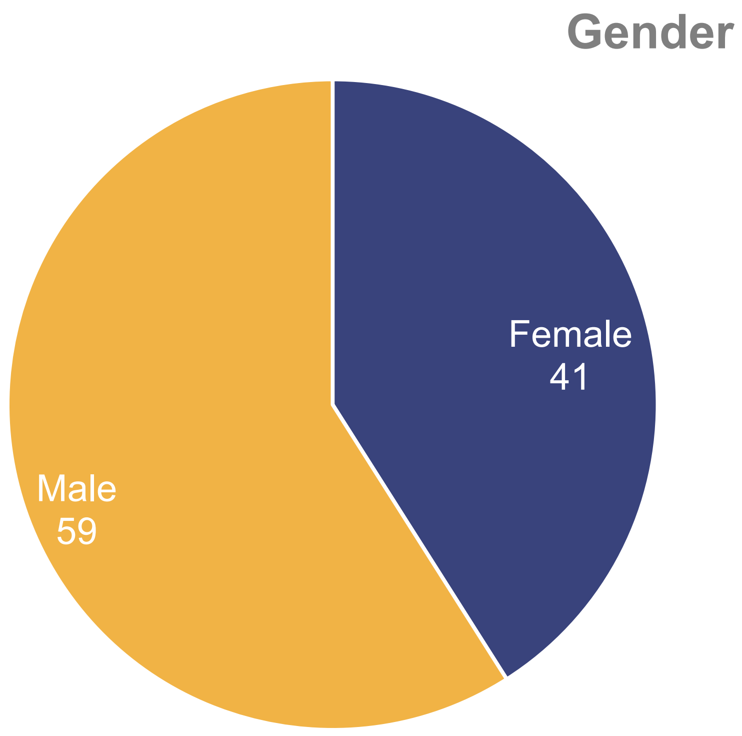
Key Findings - Levant

- Compared to the region driven by Saudi and Egypt, 6% travel to Domestic destination vs. 19% at on the overall sample. The ones that do travel domestically, all state visa issues and lack of holidays to go more often out of the country
- As seen for other sub-groups, Top of Mind awareness and used booking sites are impacted by the country of residence so we see here players such as Dallas, Nakhal, or Mawakeb which are relevant to Levant almost exclusively
- Traditional travel agencies are more relevant at search points than FF&C compared with the overall sample: 42% (vs. 44% on the overall) asked FF&C for recommendations, 37% went to an Agency looking for packages or to compare prices (vs. respectively 32% and 34% on the overall sample)
- 53% of Male respondents are the sole decision makers which is line with the Regional sample
- The Decision cycle differs from other subgroups since Destination is the 4th choice made. Accommodation comes first and is mentioned by 69% of the respondents
- Accommodation is evaluated with more attention than for other groups: cost (a concern for 64% of the respondents vs. 50% on the regional level), classification (highlighted by 51% of the Levant respondent vs. 38% on the overall sample), location (listed by 61% vs. 41% at an overall sample), rating and reviews (mentioned by 48% of the Levant respondents vs. 32% of the overall sample)

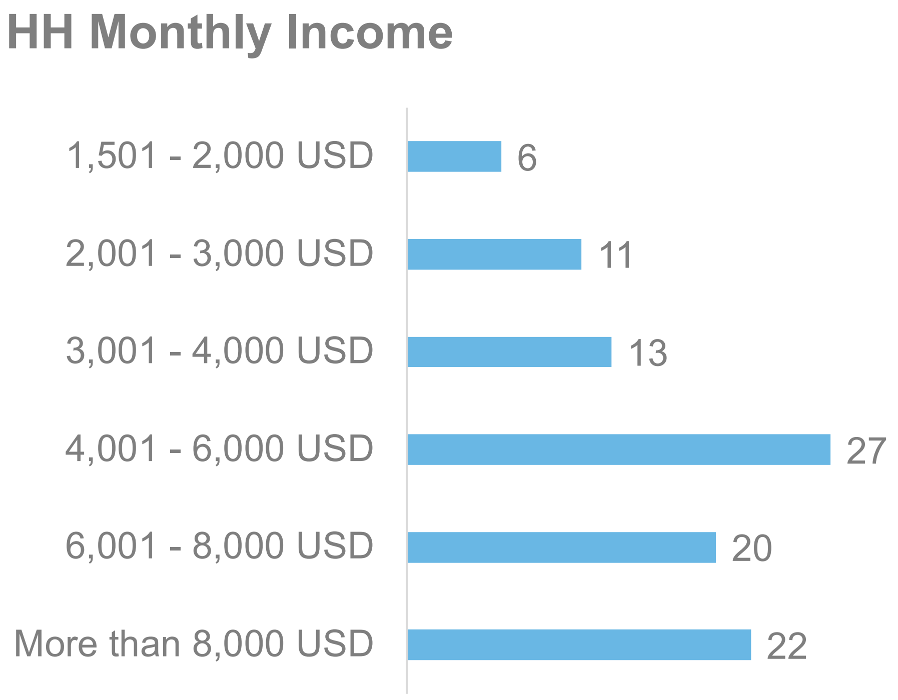
Key Findings - Levant

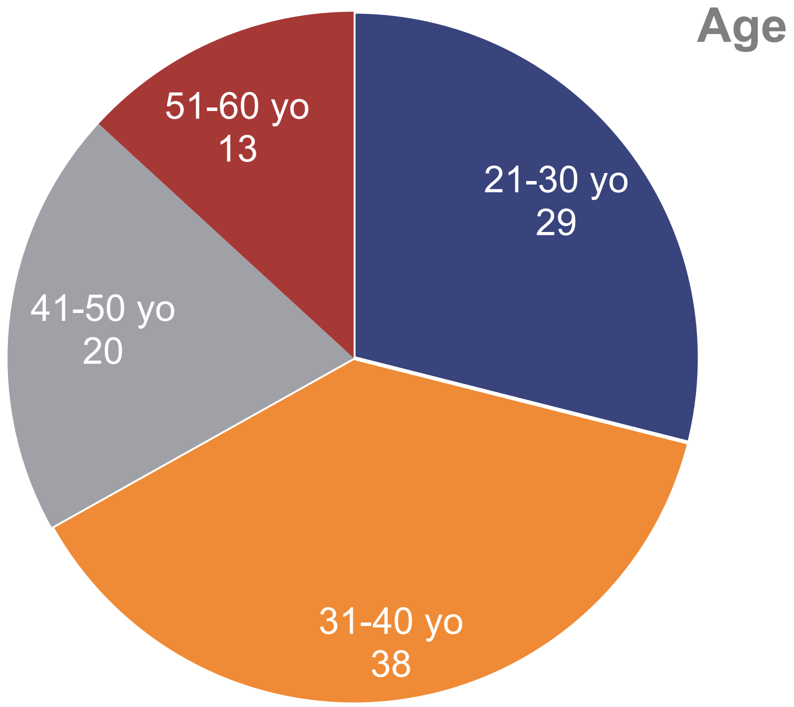
- For transportation, cost of tickets (58%) and itinerary (40%) are also a bigger concern for Levant respondents than the overall sample (respectively 46% and 29%)
- For the activities, Levant respondents are fond of Shopping (46%) but list relaxing and pampering lower than the overall region since listed by 28% of the Levant respondents vs. 48% and 40% respectively for total sample
- For those who eventually booked offline after an online search, the trust in online payment is a key factor (26%). Also, payment by credit cards is lower than the overall region (56% vs. 71% when booking flights, 59% vs. 70% when booking Accommodation).
- Packages though are more popular than the overall region: 20% mentioned booking packages with Hotel & Flights (vs. 10% for the overall sample) and 20% mentioned booking a package with Flights, Accommodation & Activities (vs. 18% for the overall sample)
- Packages are generally booked based on pricing **(59%).**
- Decision makers are mostly ladies since 51% decide all alone of the vacation.
- The Decision cycle differs from other subgroups since Destination is the 4th choice made. Accommodation comes first and is mentioned by 69% of the respondents.

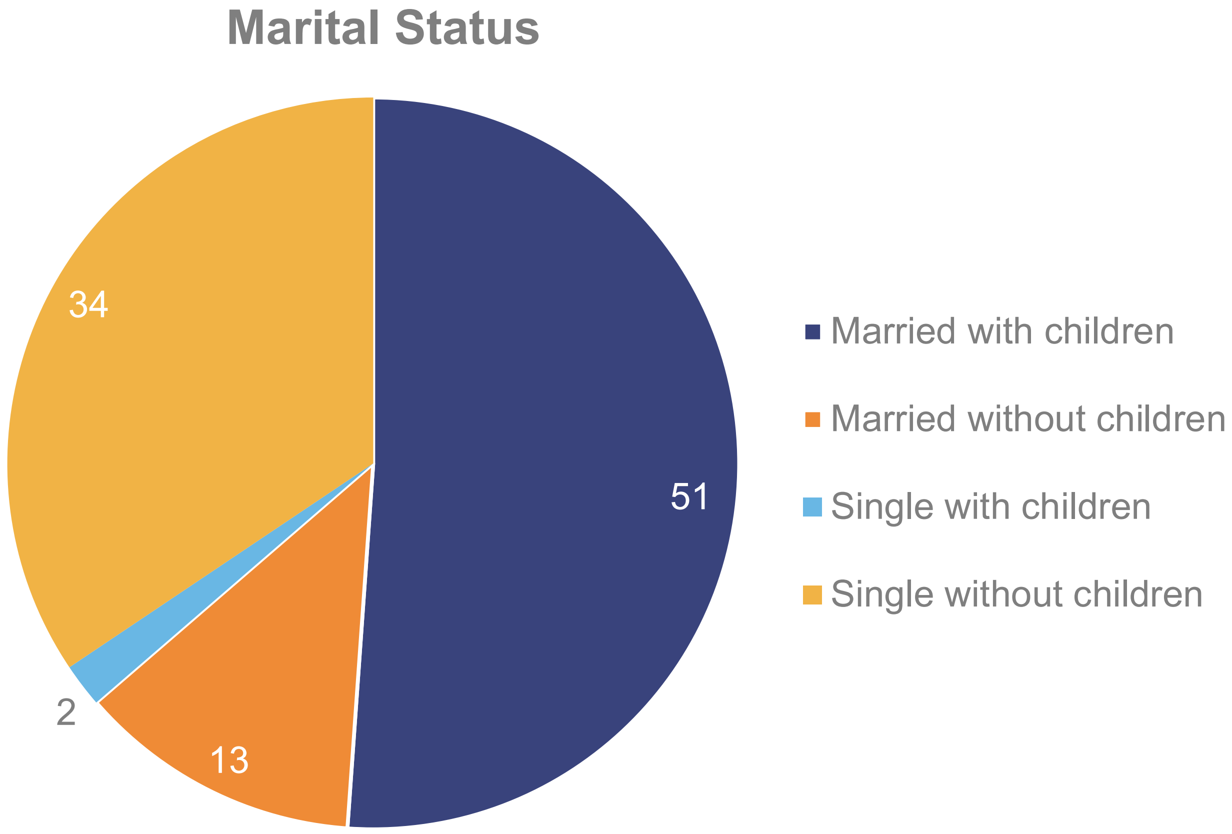
Sample Composition

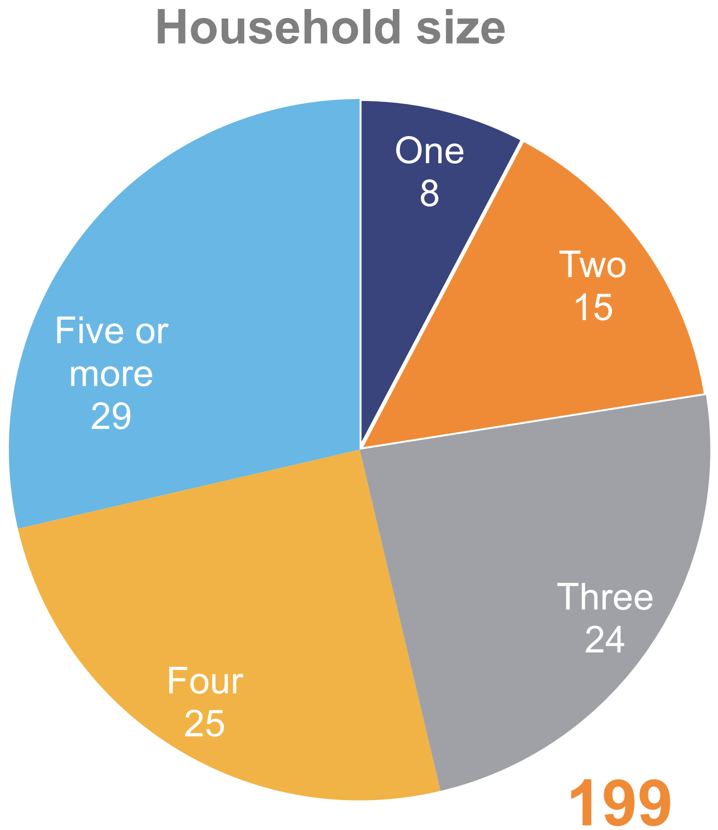


67% of the respondents are between 21 and 40 years old
51% are Married with children



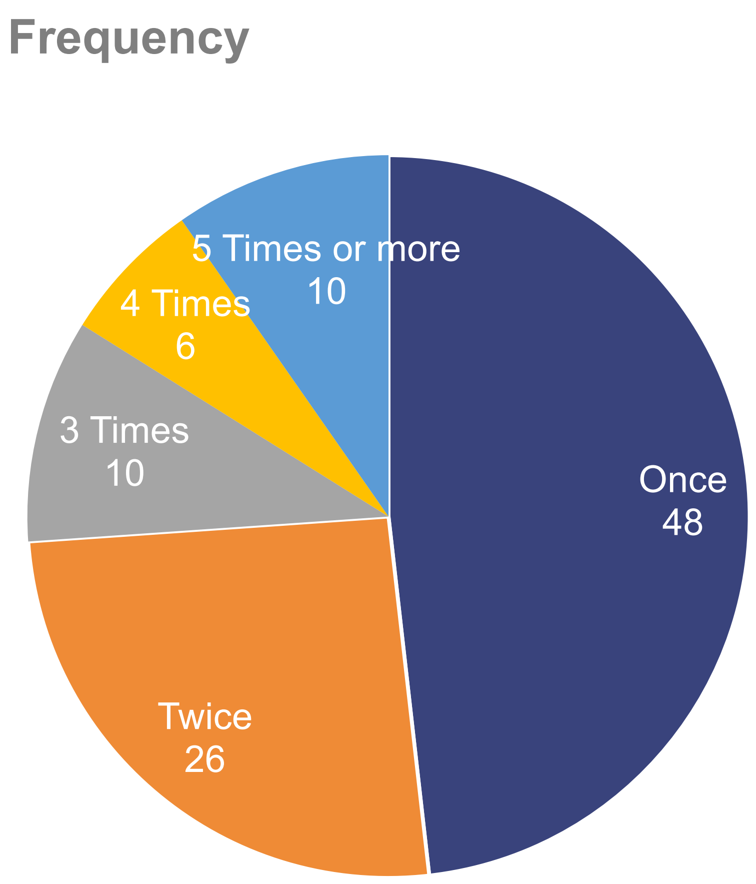


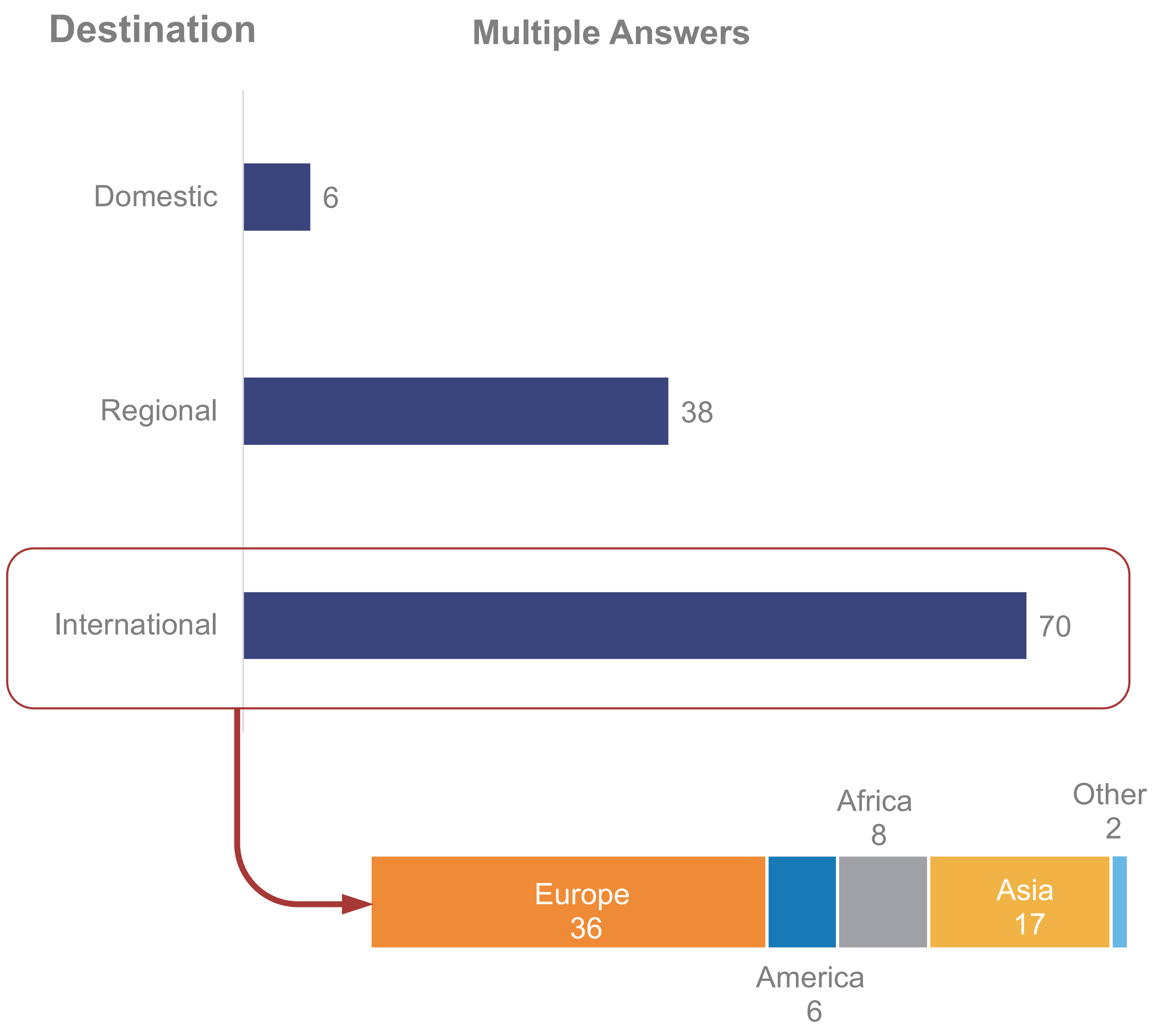


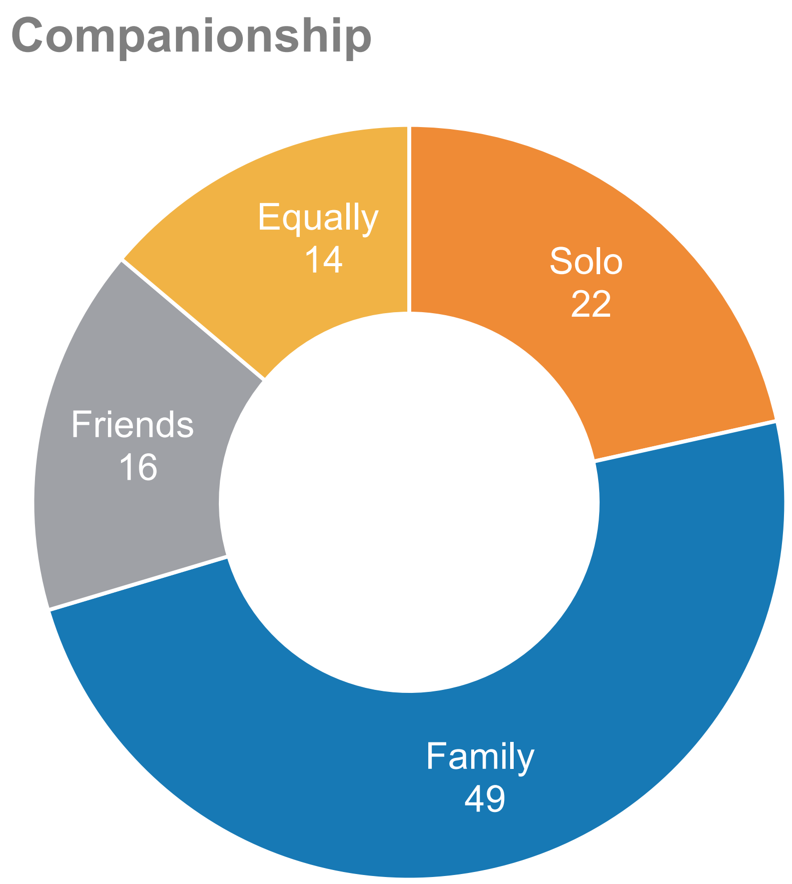


Travel

Lowest Frequency with 26% only travelling 3 times + and mostly travel internationally 70%

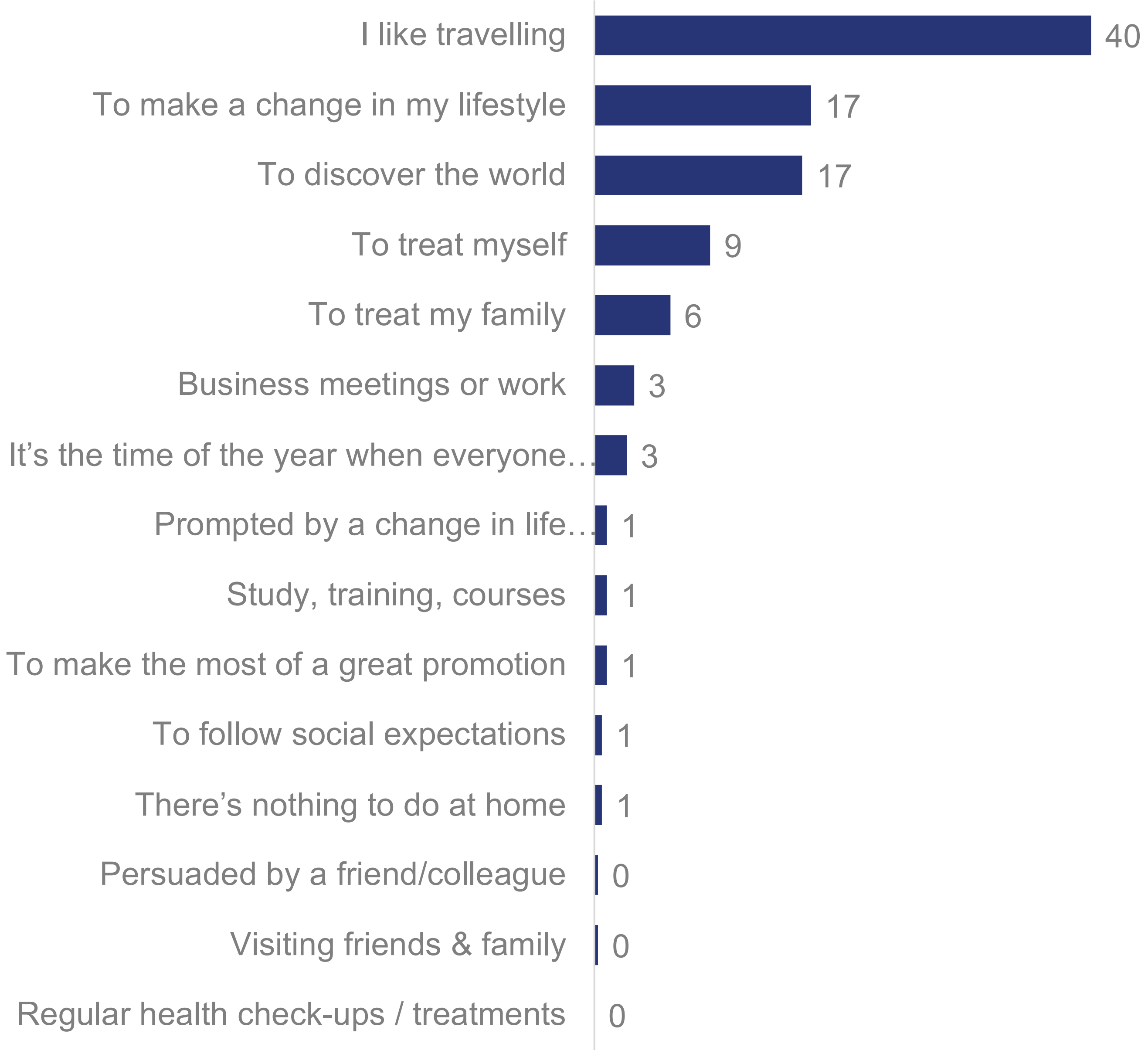




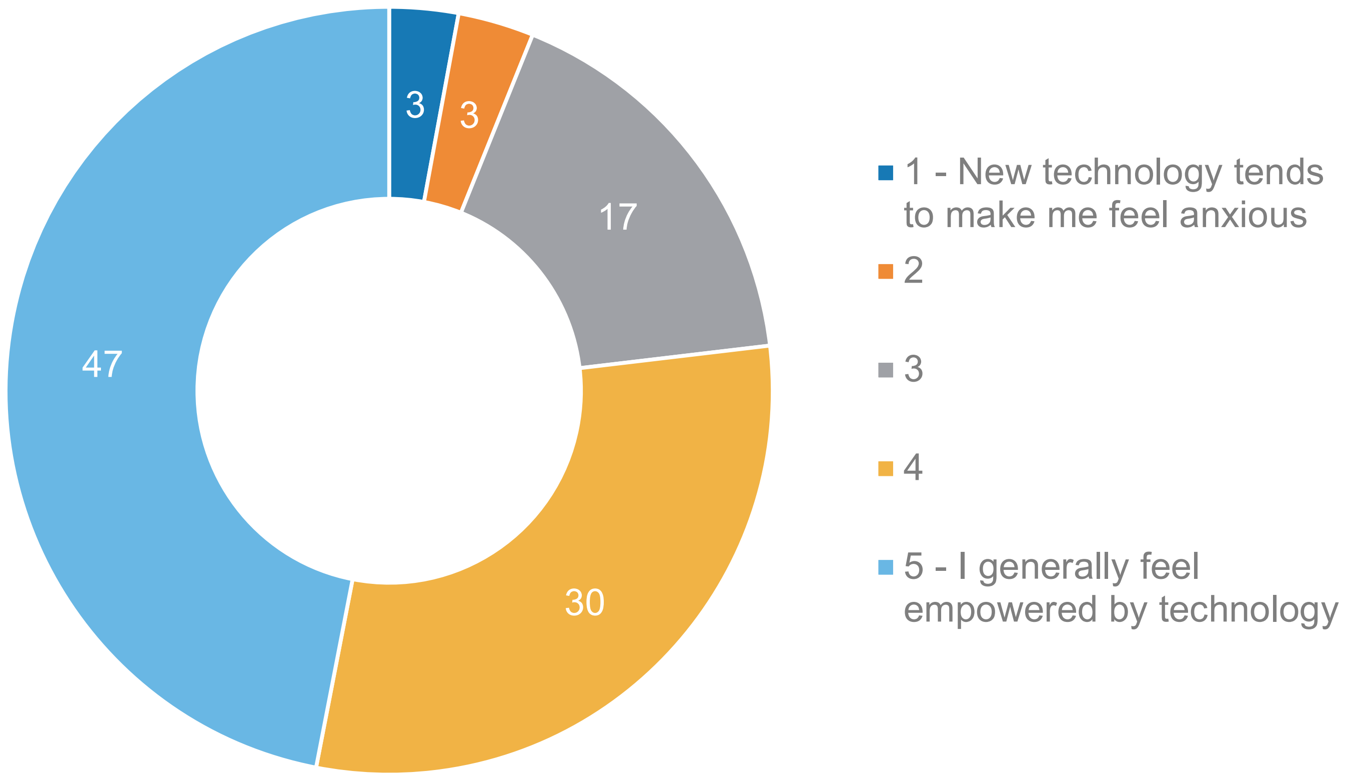


Mindset When Booking Travel

Motive for travelling



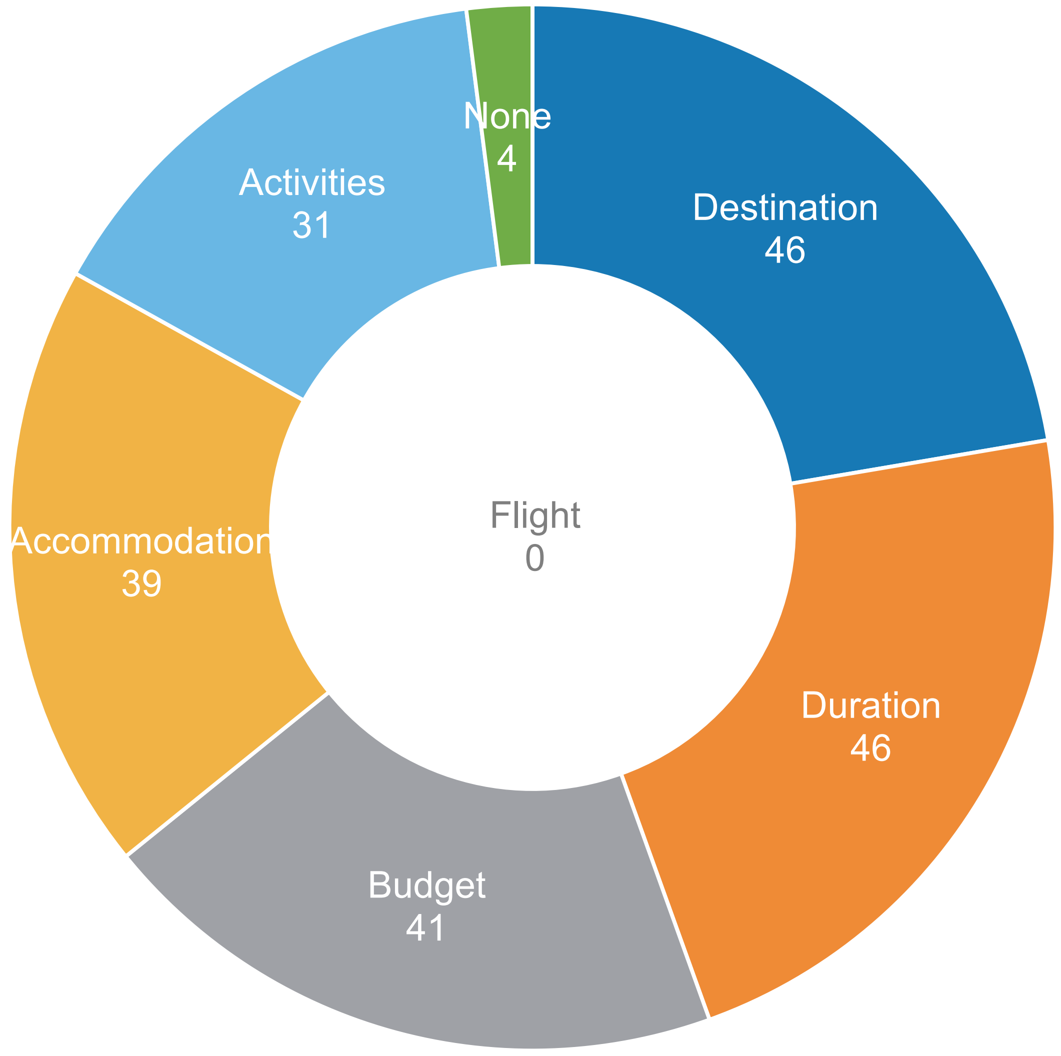
Tech savviness



Mindset When Booking Travel

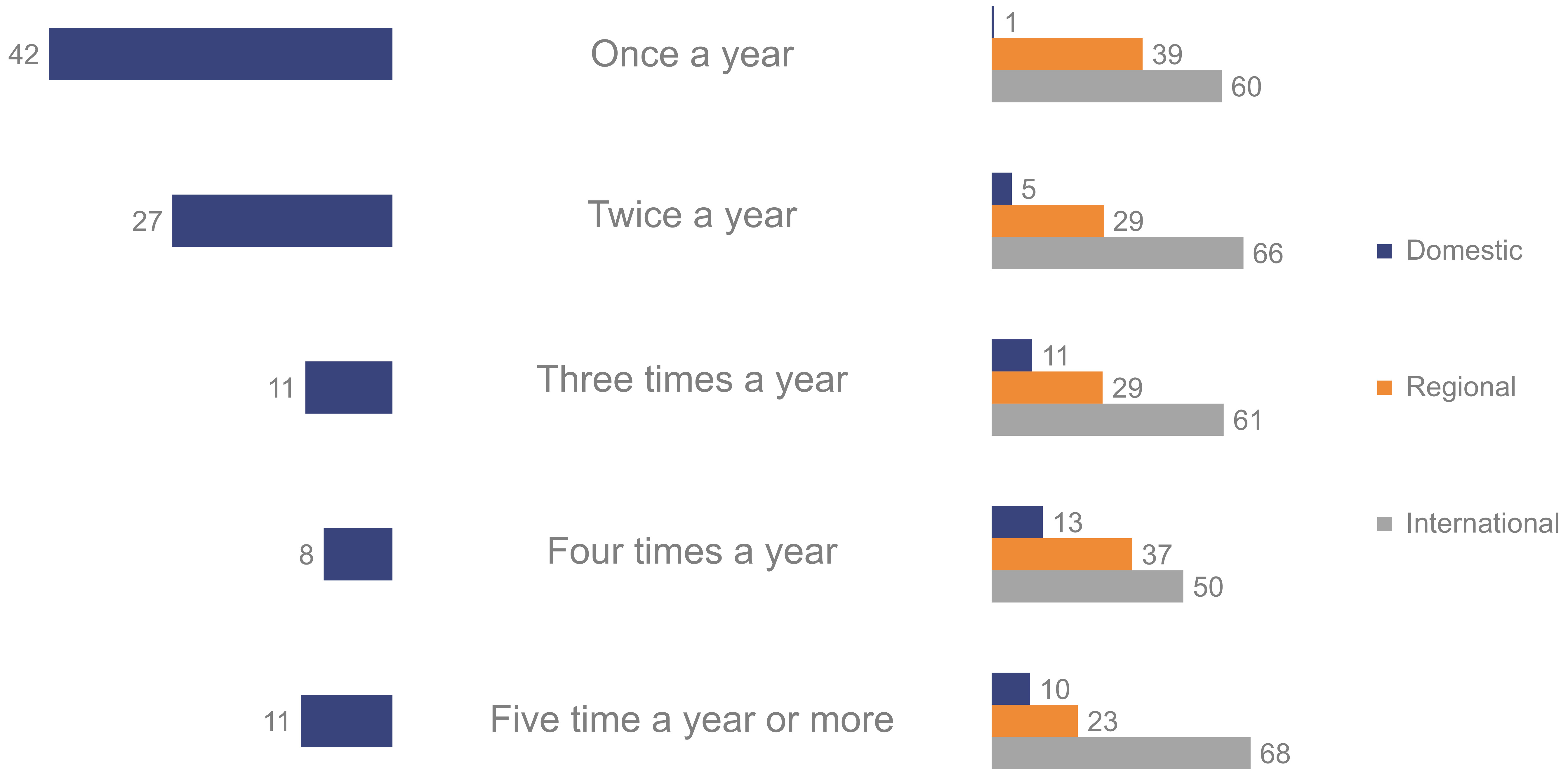
Exploration

Pre-Determination



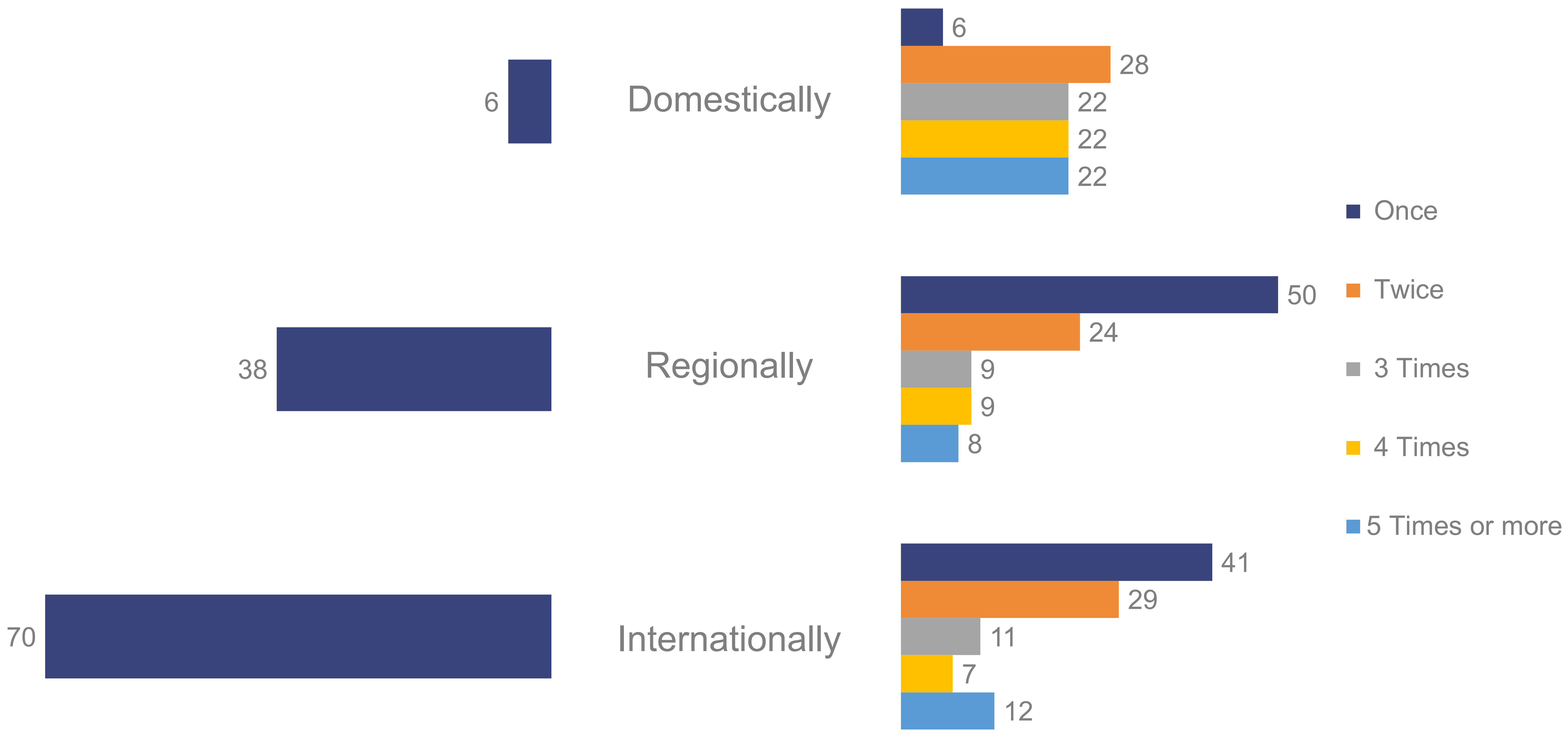
OPEN 60 **COMMITTED** 40

Travel Patterns by Frequency



Base: Frequency

Travel Patterns by Destination

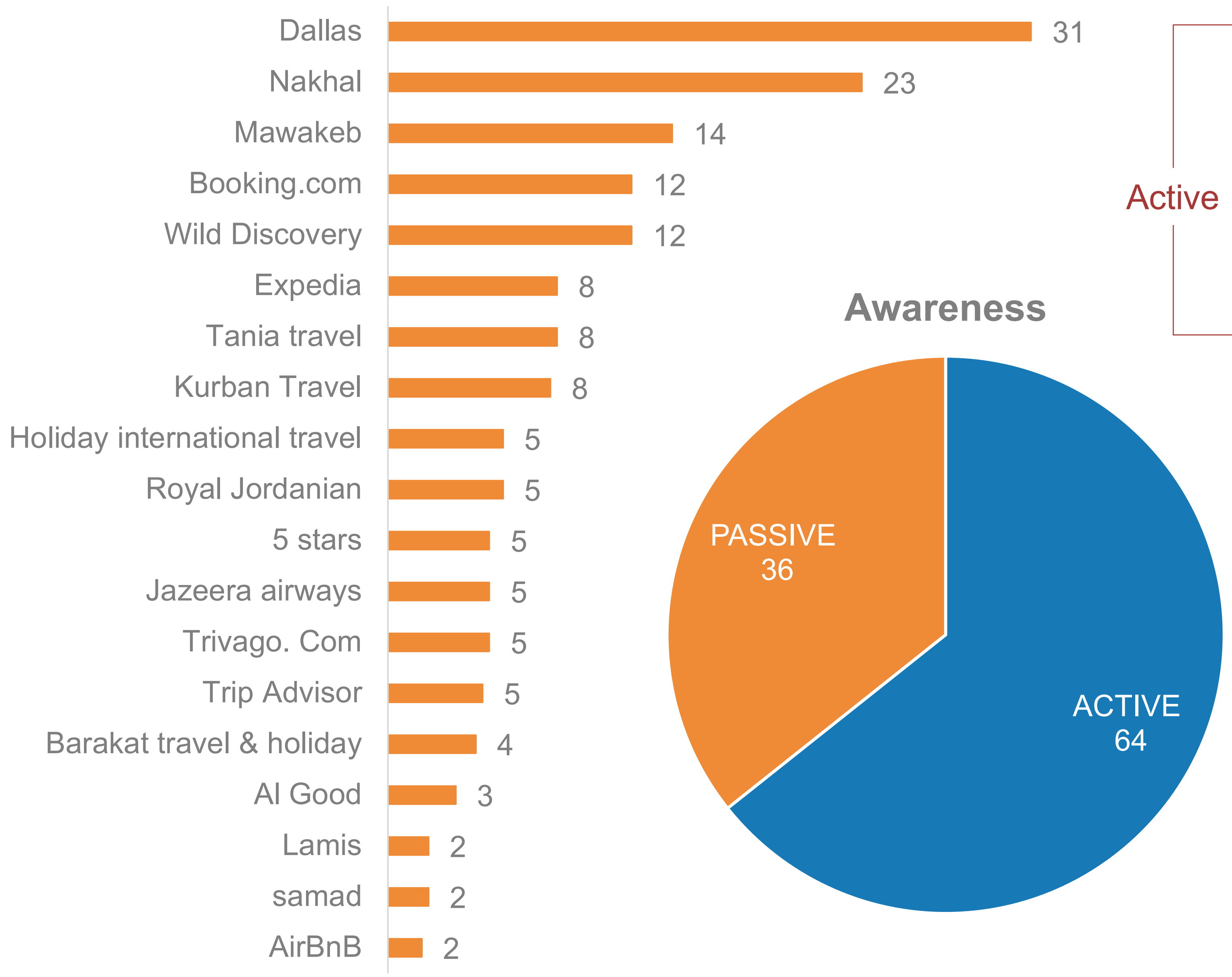


Multiple Answers

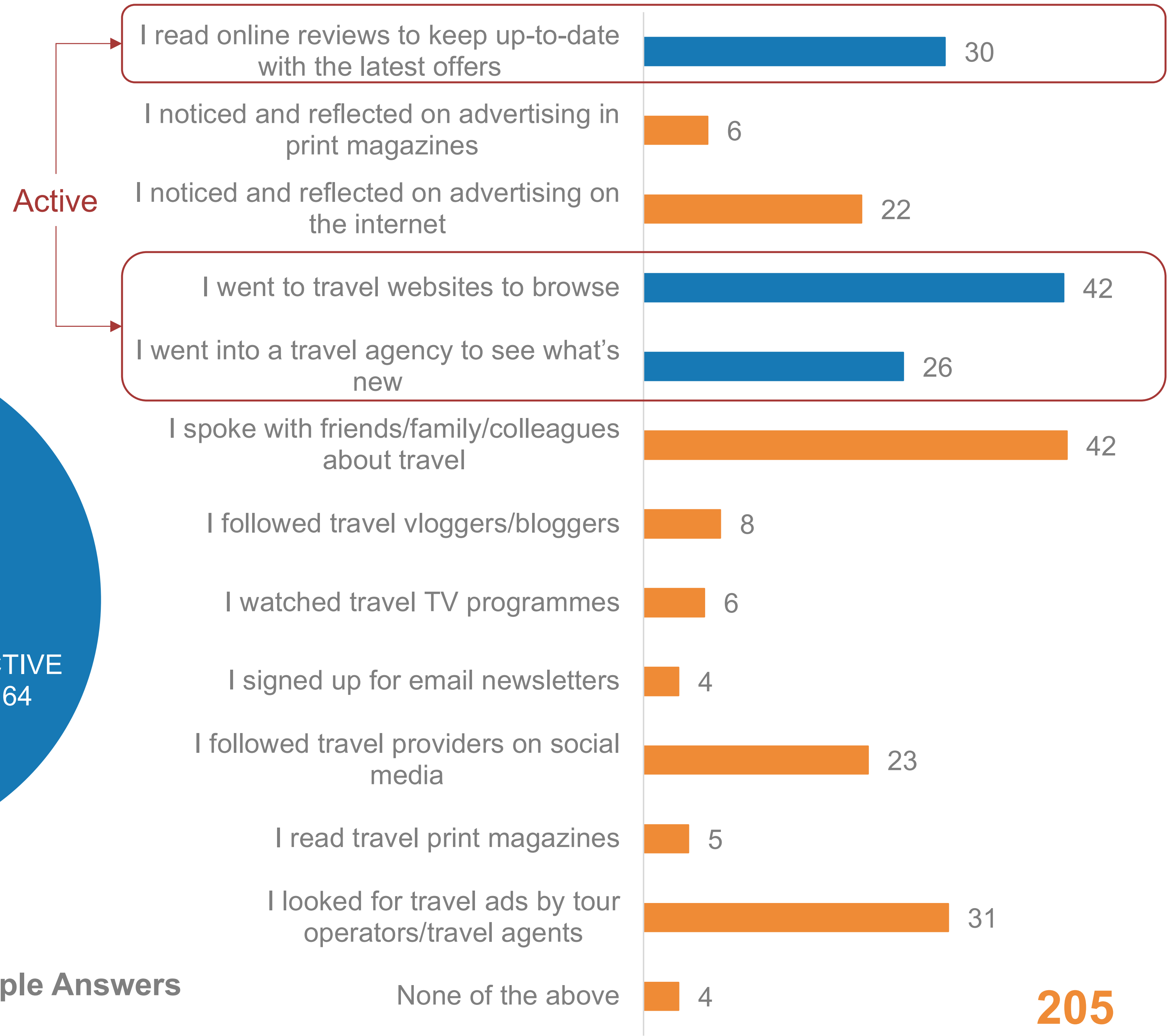
Base: Destination

Awareness

Top-of-Mind



Sources of travel info

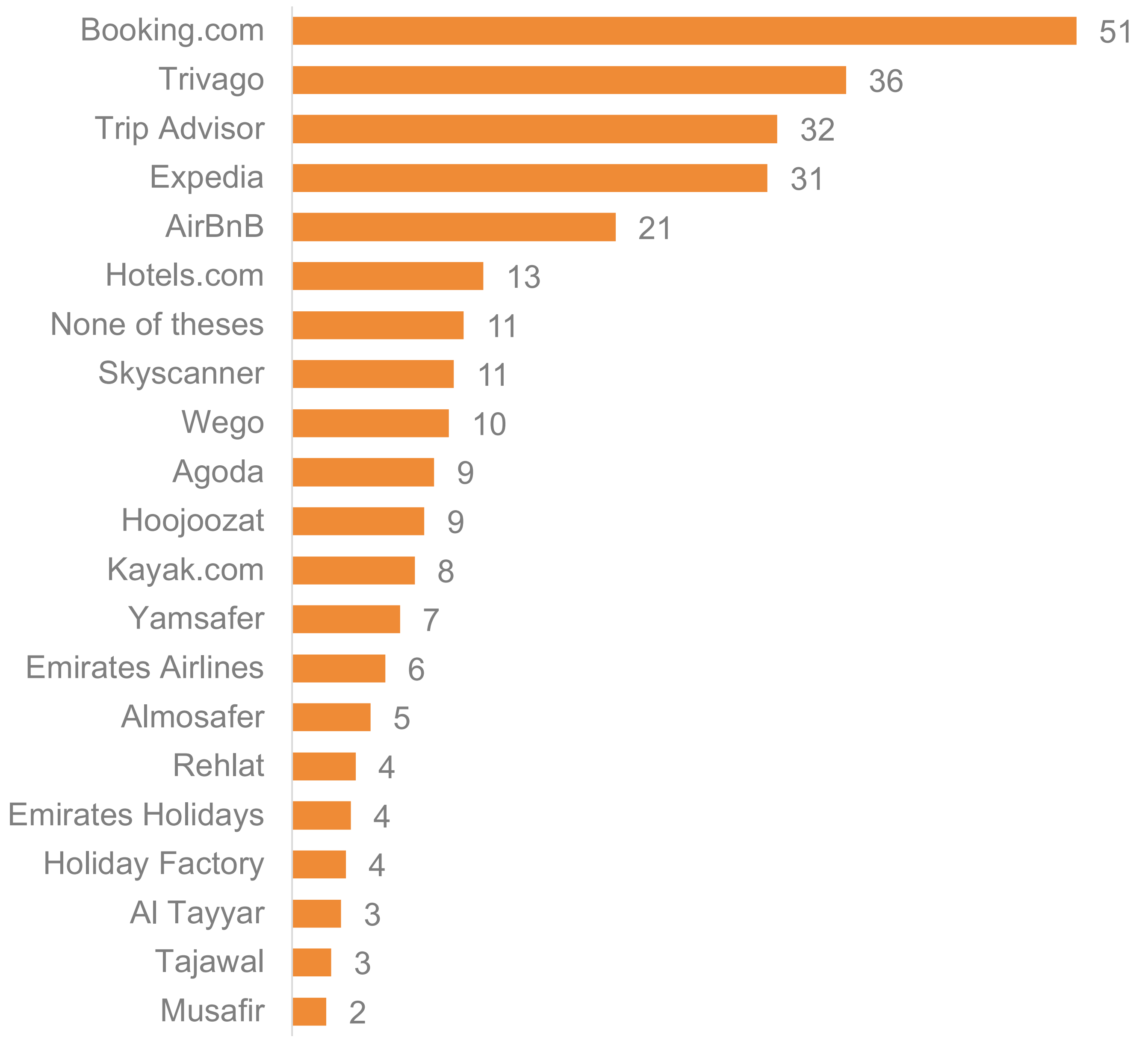


Multiple Answers

Online Search Points

Process

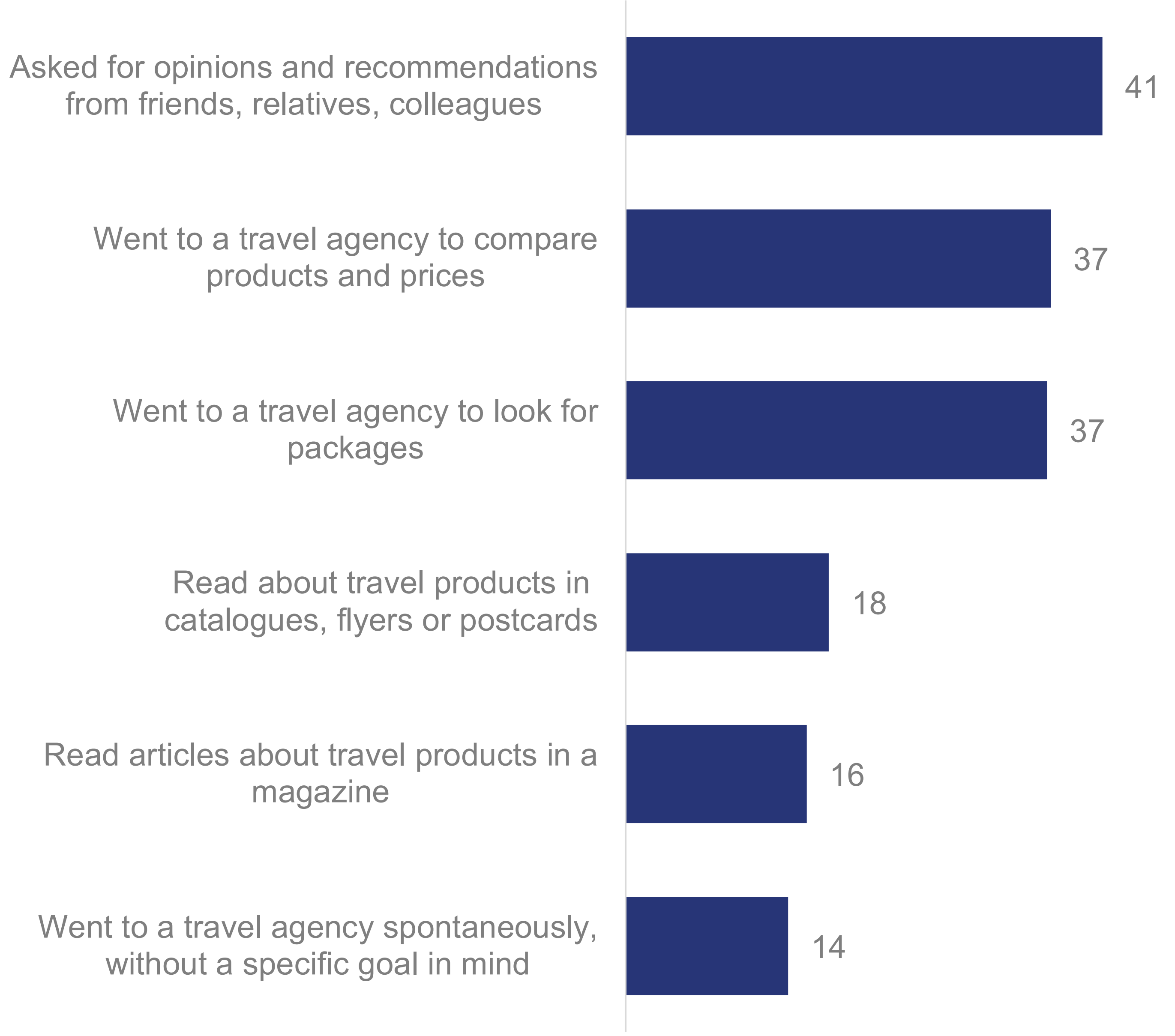
Top websites



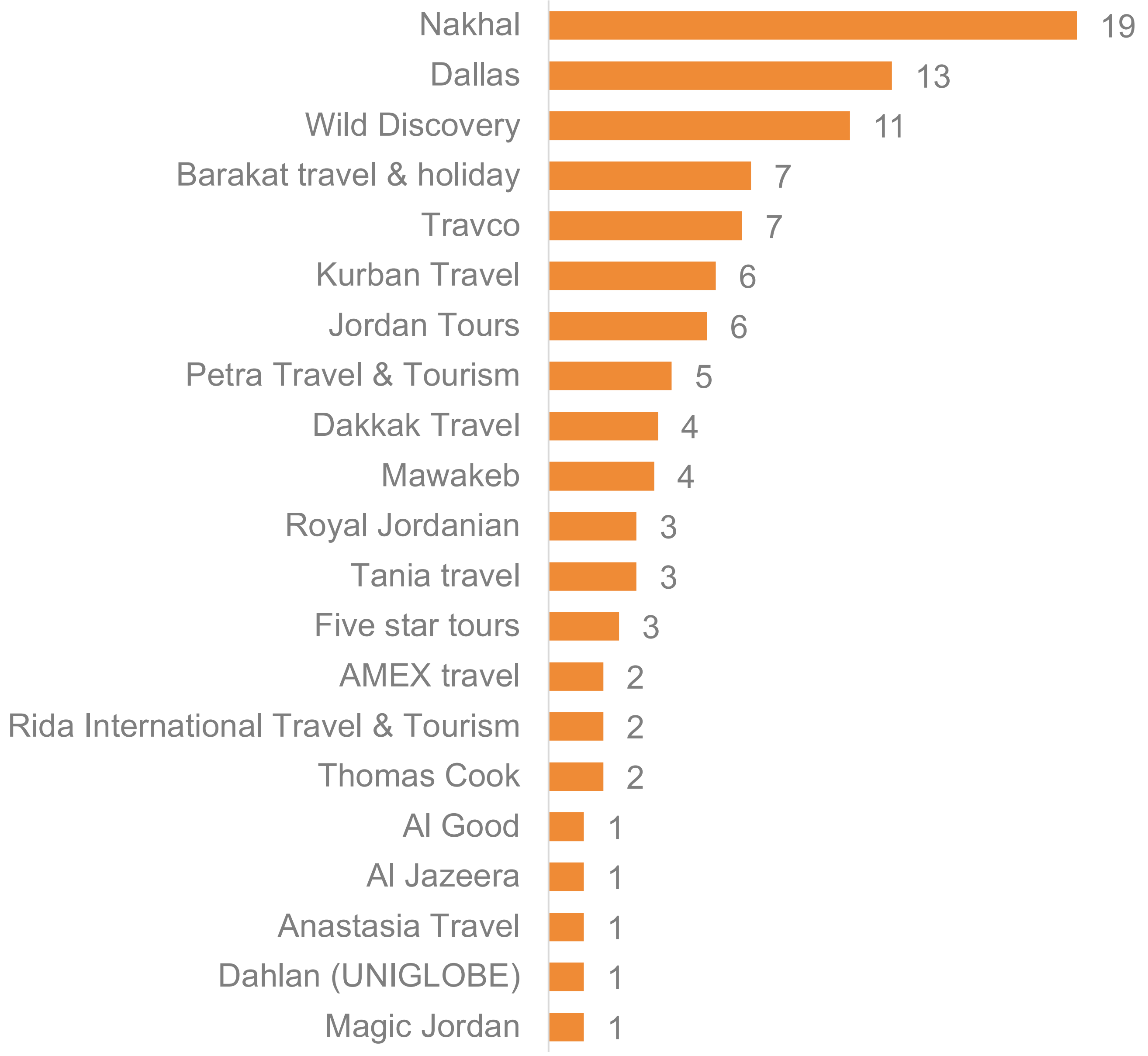
Multiple Answers

Offline Search Points

Process



Top Agents

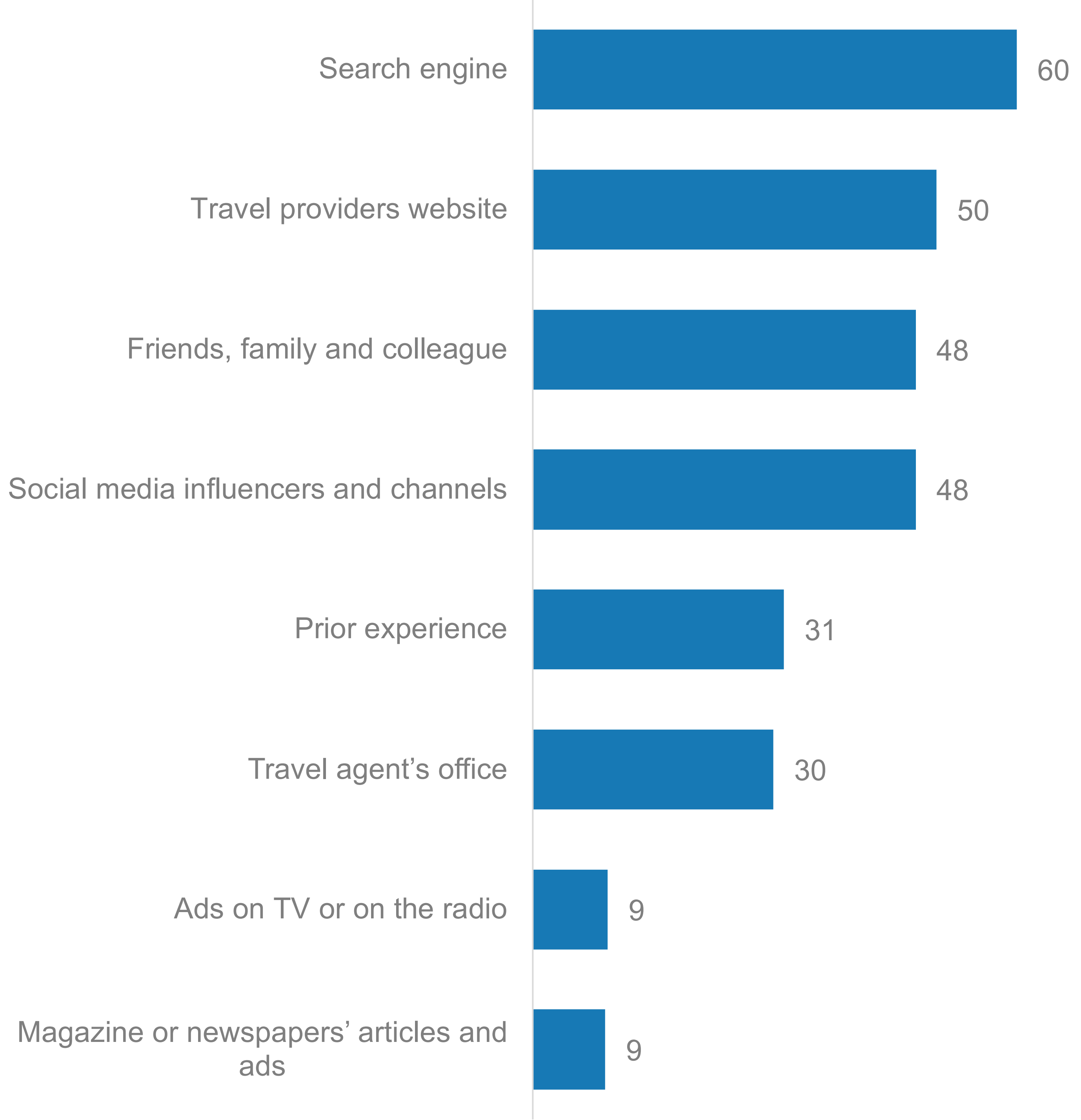


Multiple Answers

Decision Process: Who Decides?

Influencers

- 48% (vs. 53% on the overall sample) admitted being influenced by the Friends, Family & Colleagues
- 50% are influenced by Travel providers 60% by Search engines and review sites (compared to 46% and 47% respectively for the overall sample)

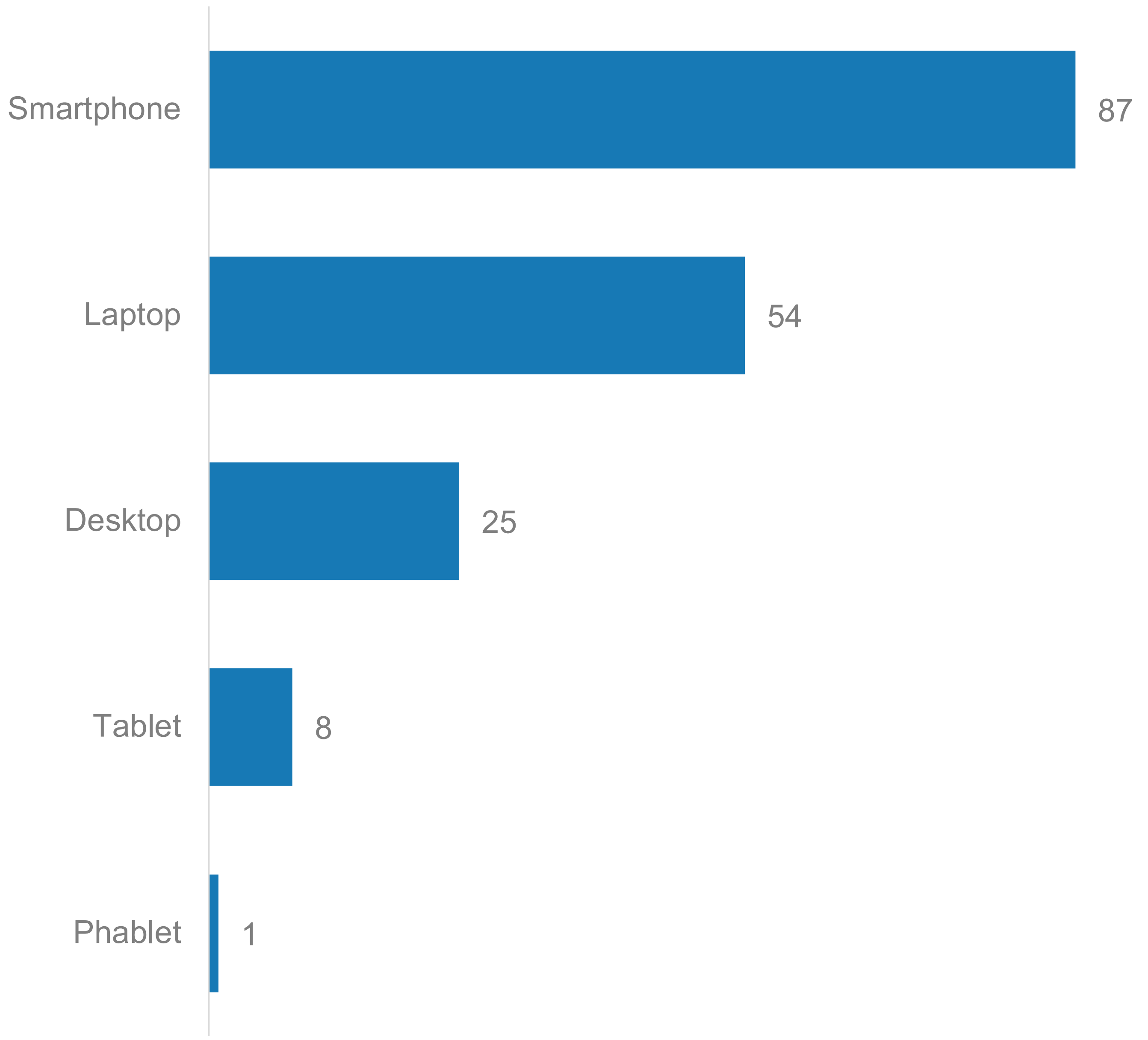


Multiple Answers

General Considerations

Decision cycle

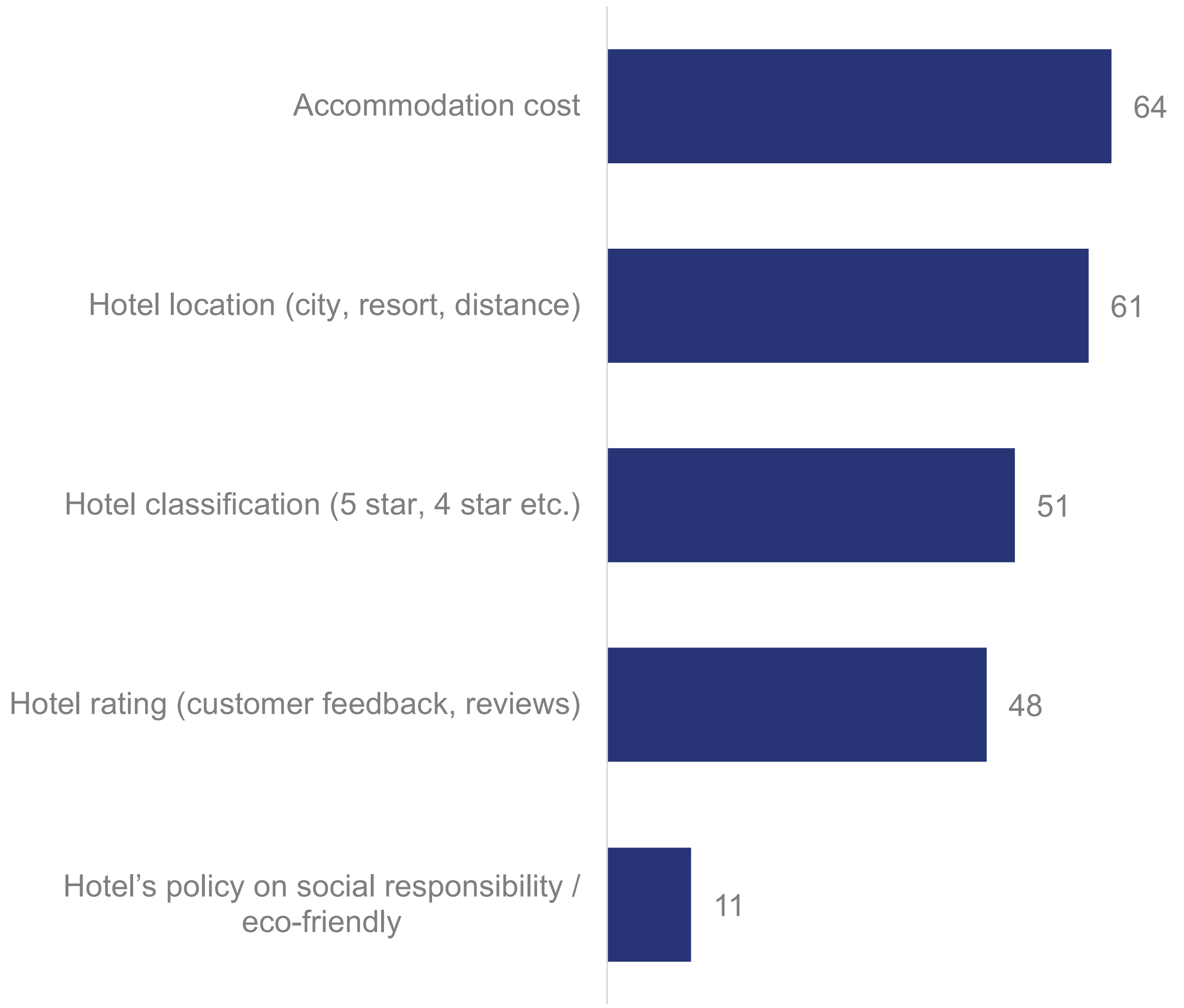
Device used for search



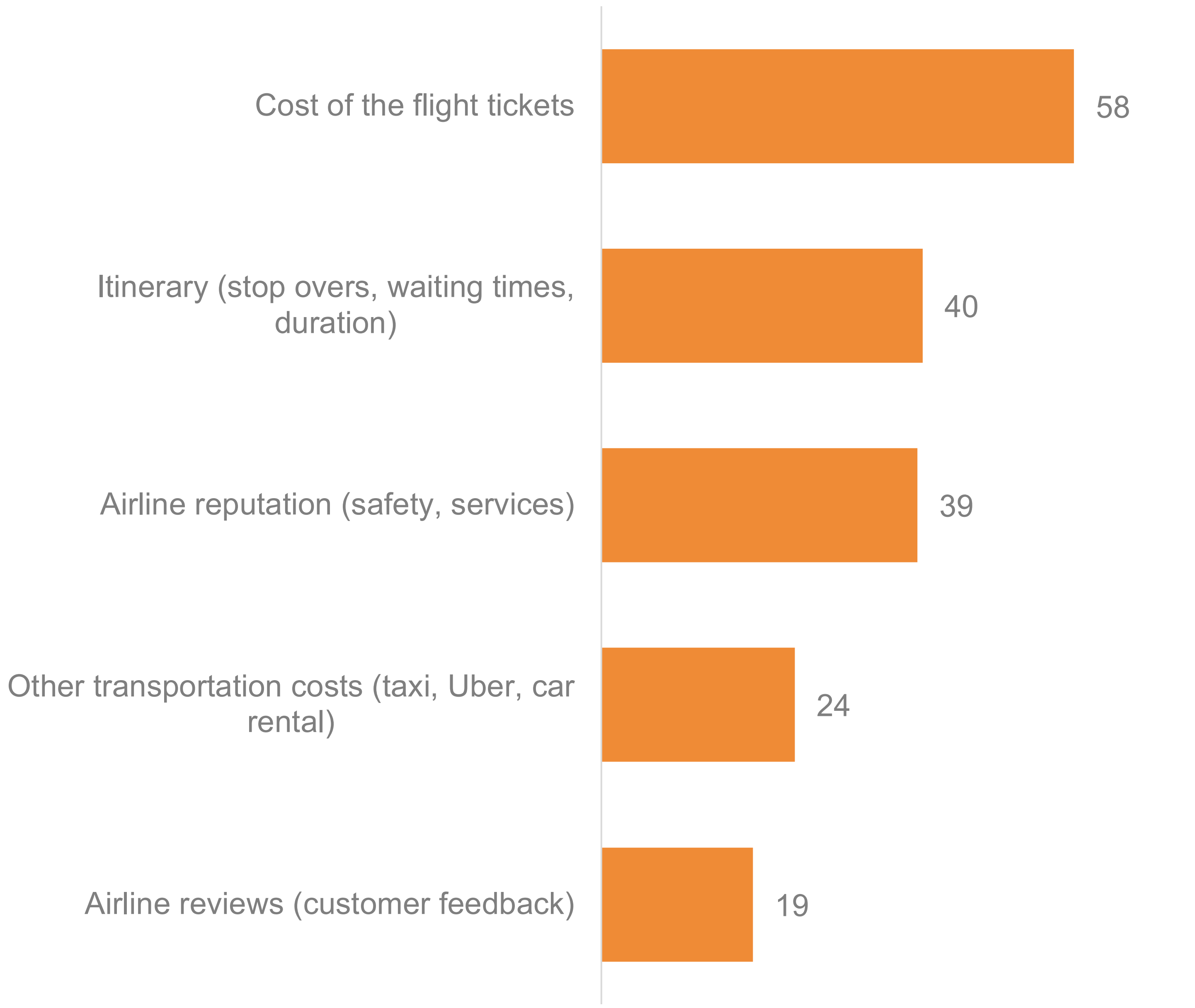
Multiple Answers

Destination Evaluation

Accommodation

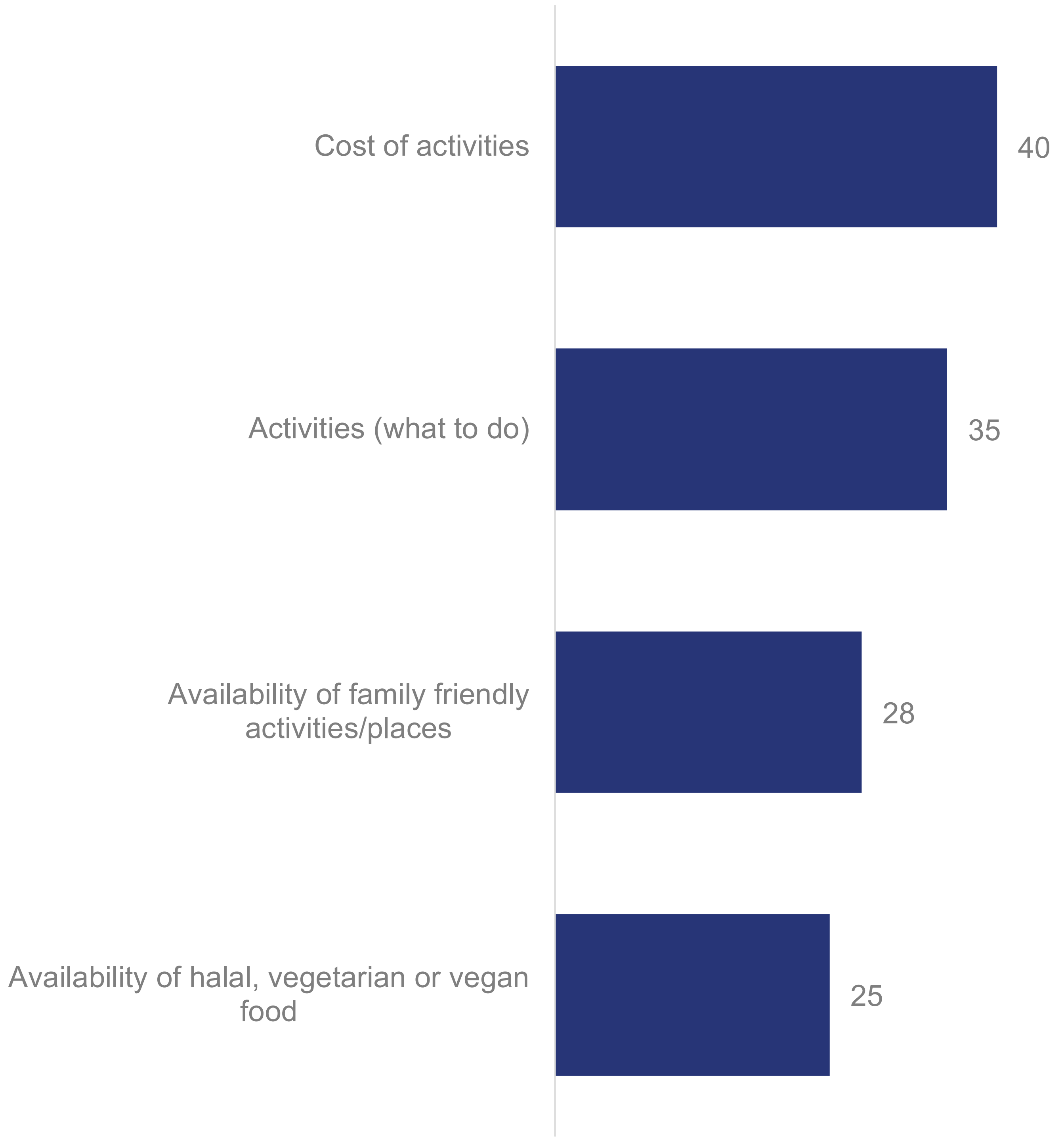


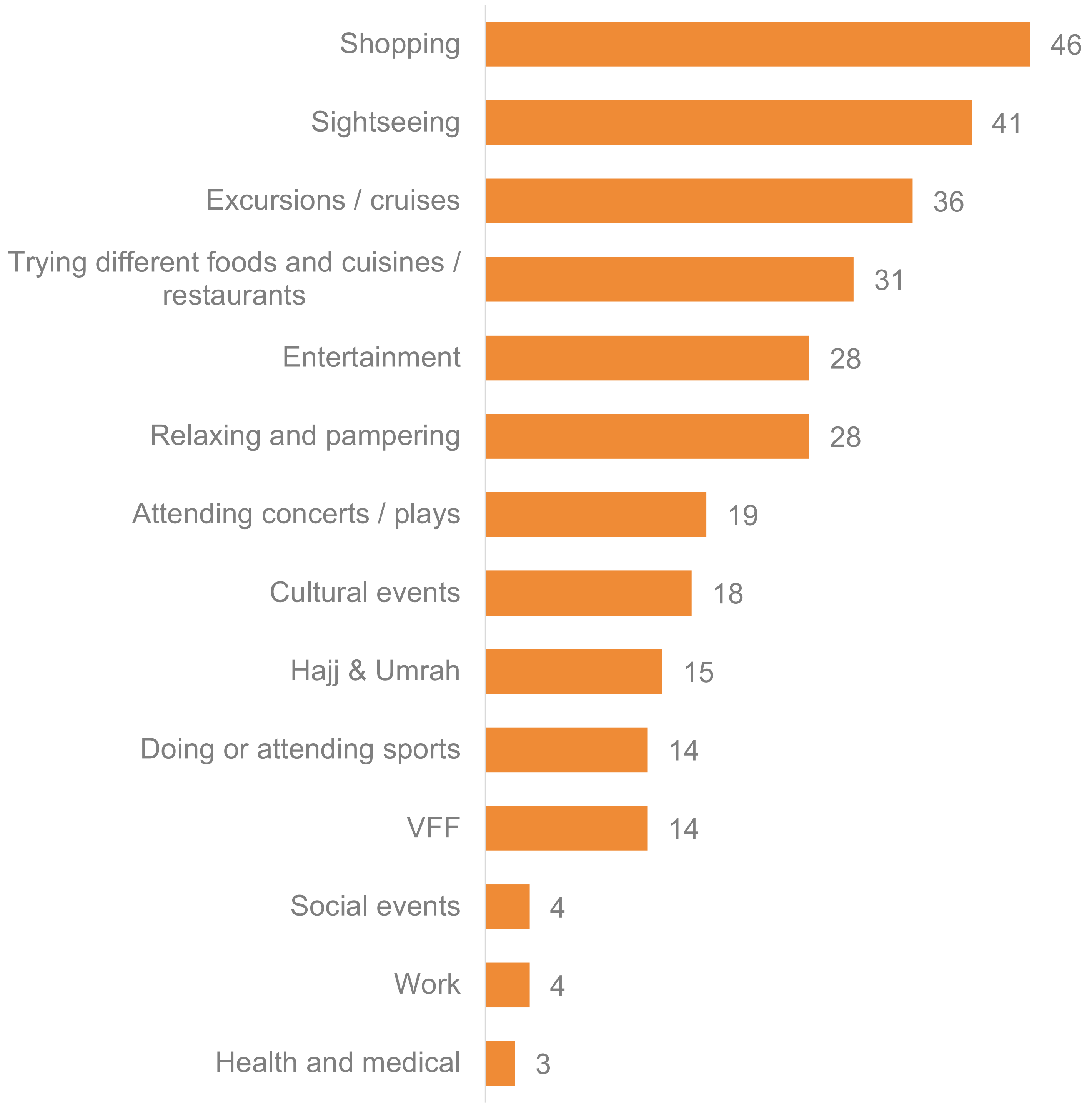
Transportation



Multiple Answers

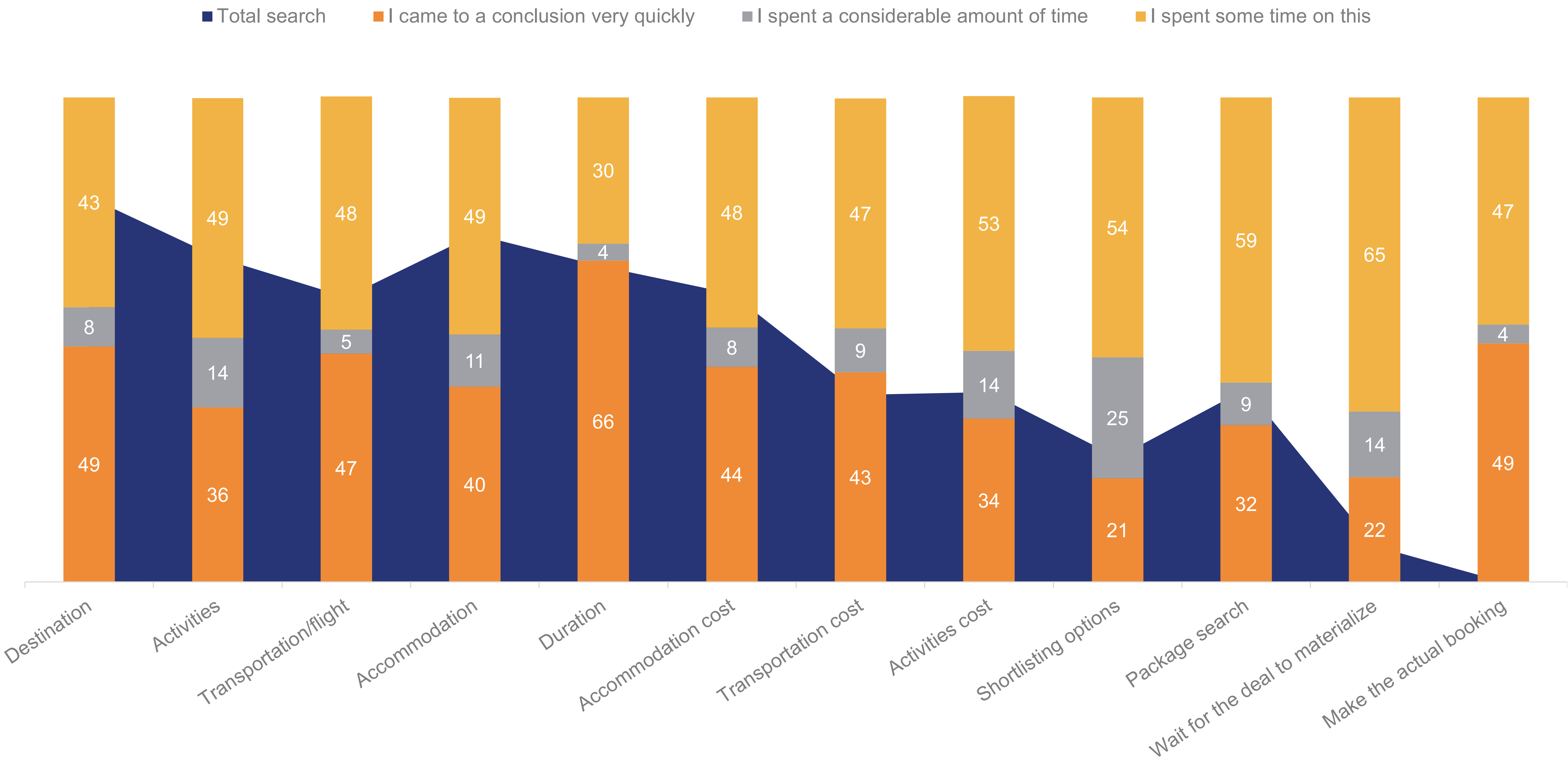
Activities Considerations





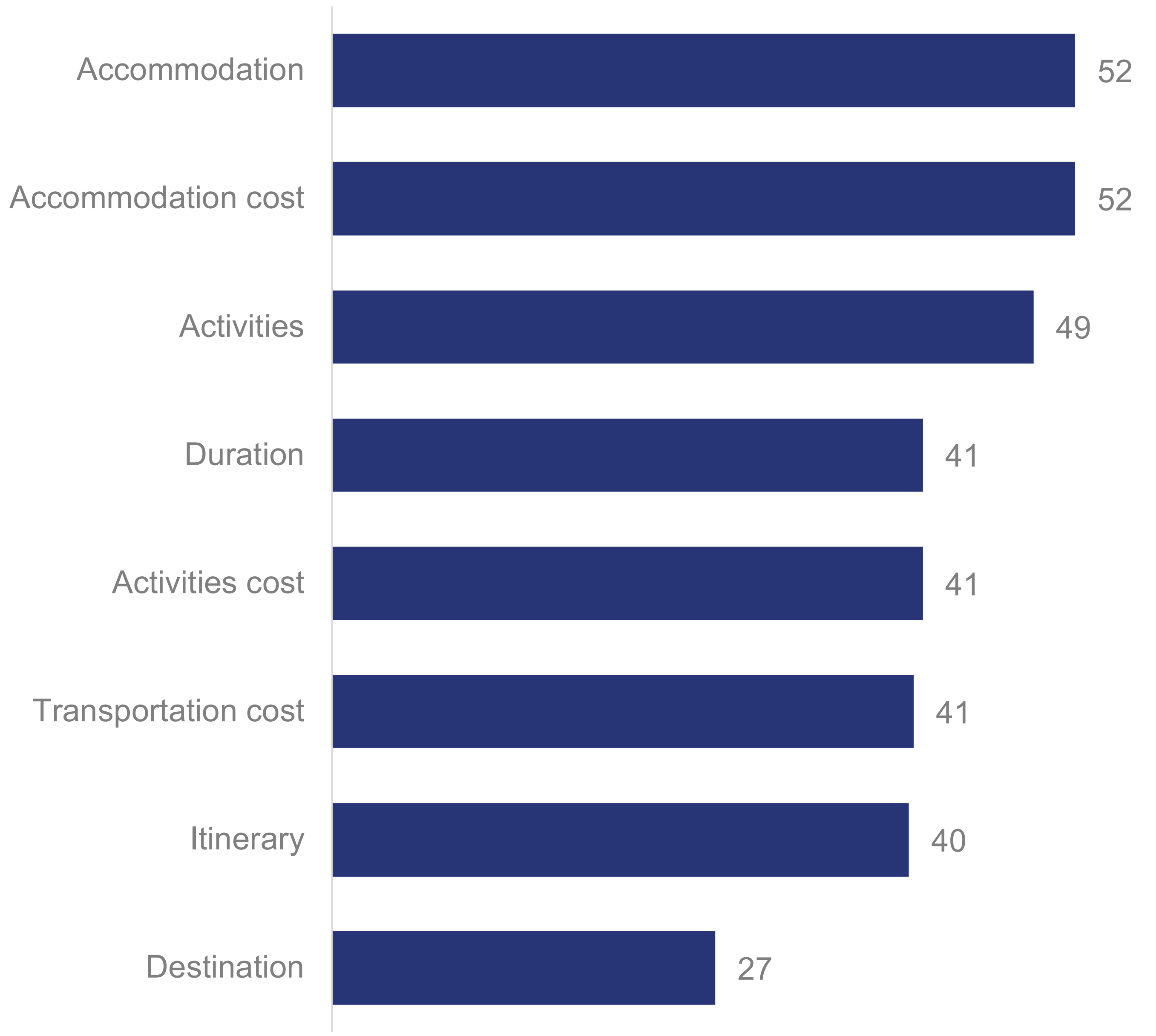
Multiple Answers

Search Cycle vs. Time Spent

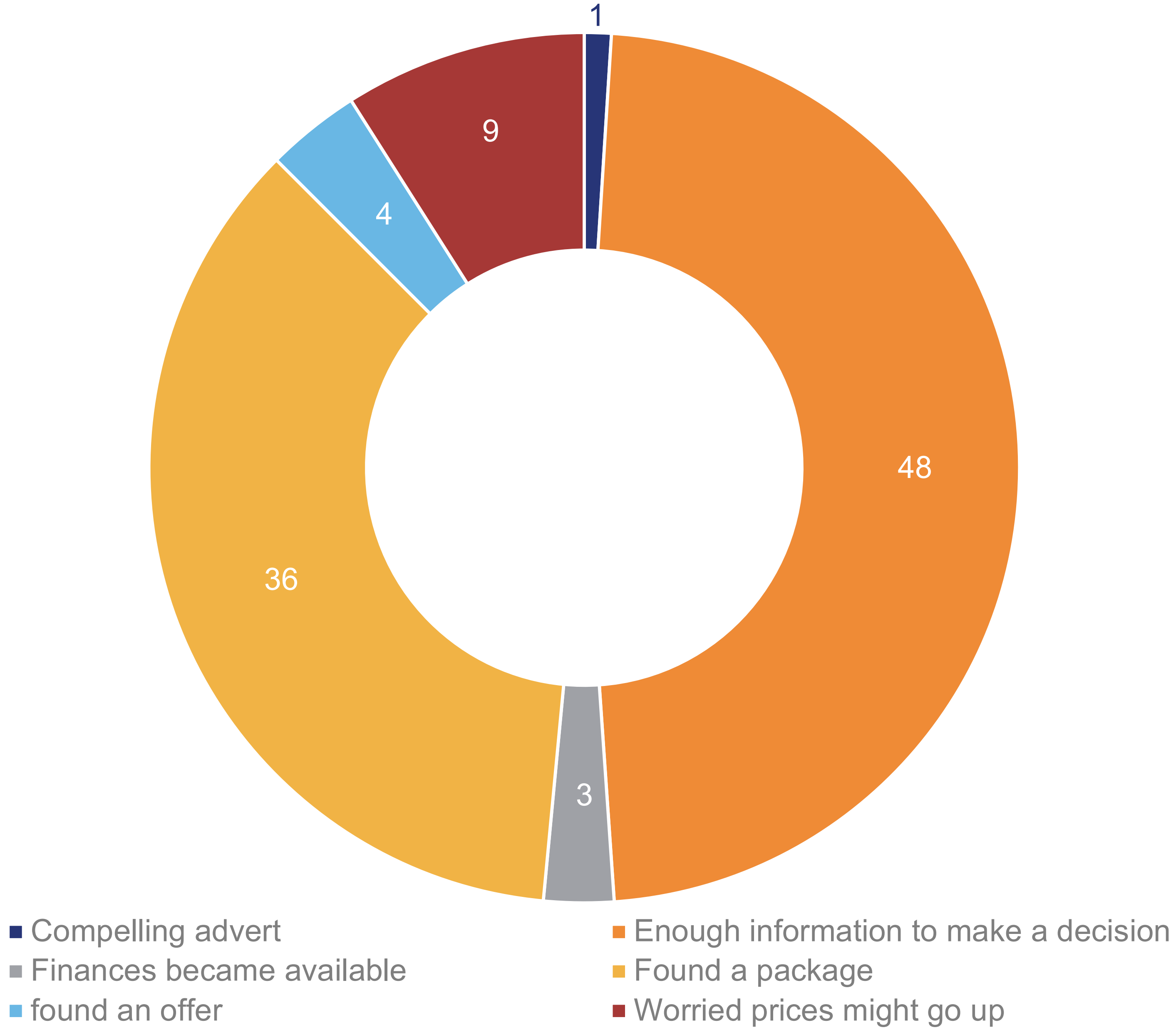


Reconsideration vs. Commitment

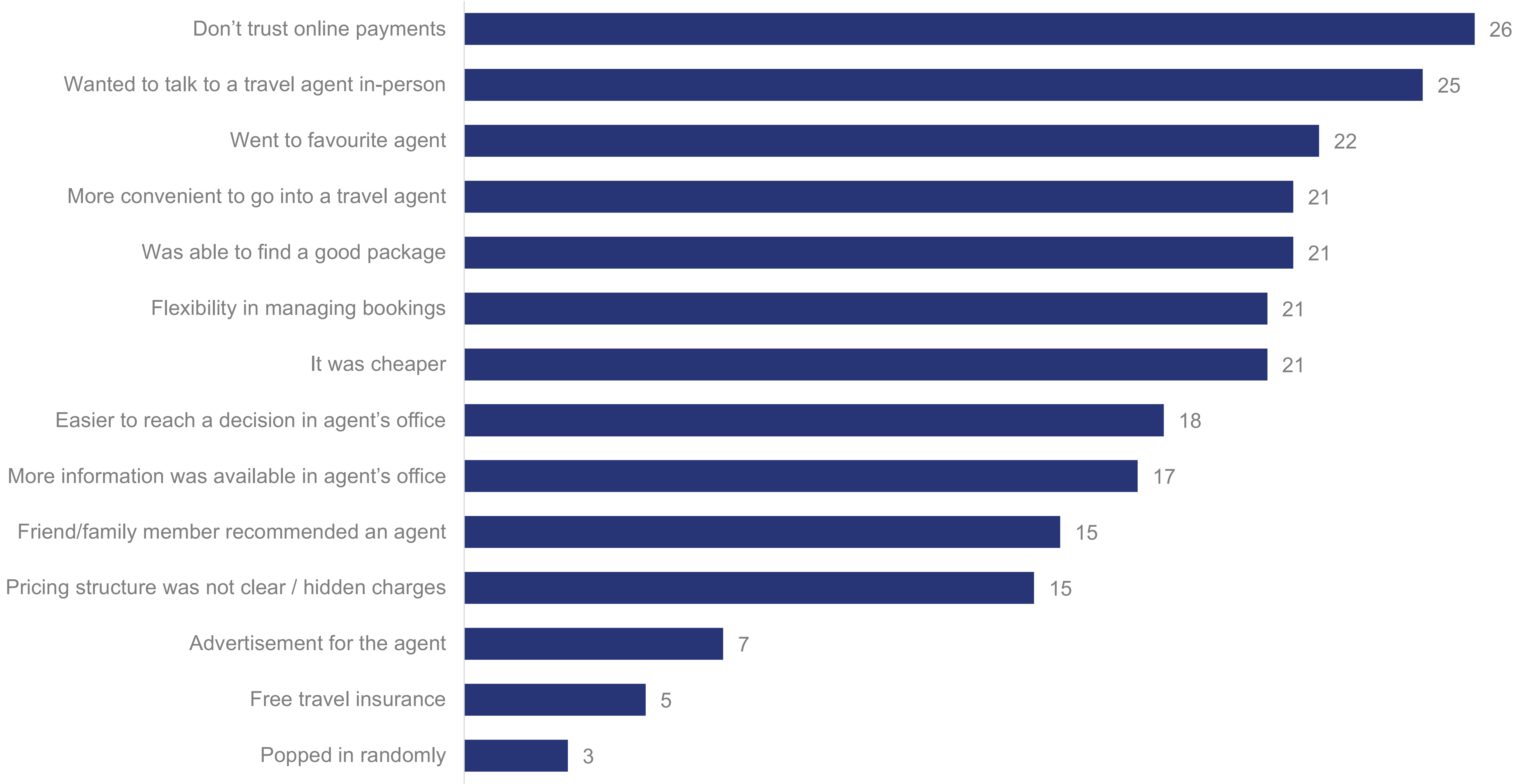
Change of mind
(during the process of search)



Trigger for making the booking



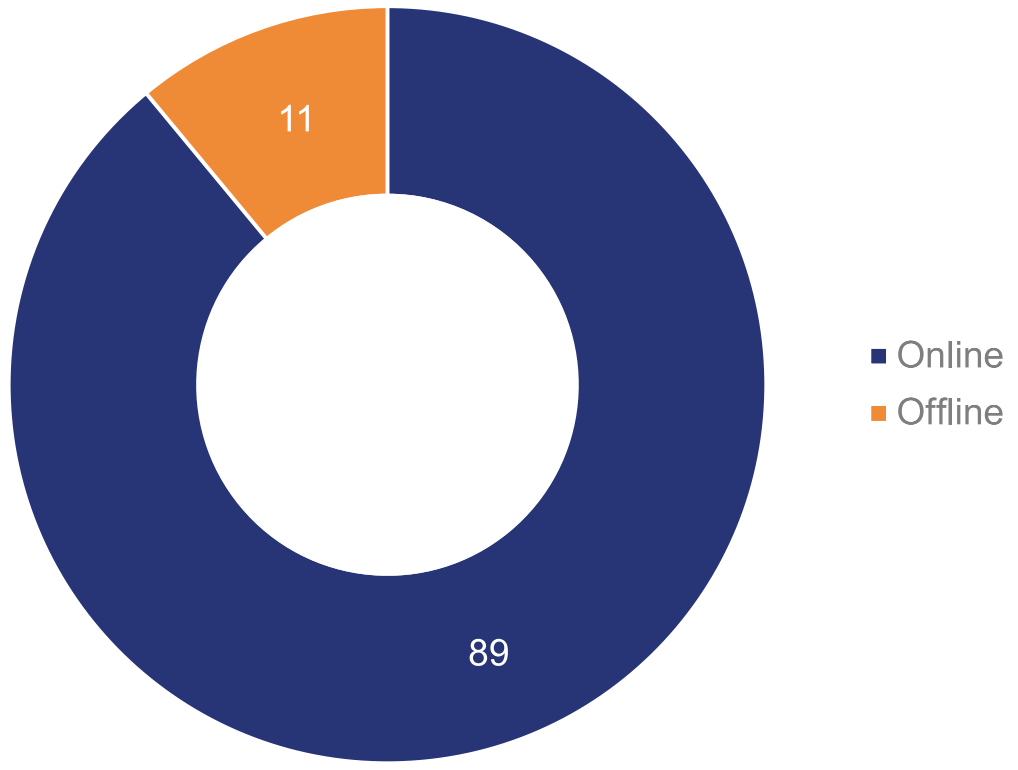
Searched Online but Booked Offline



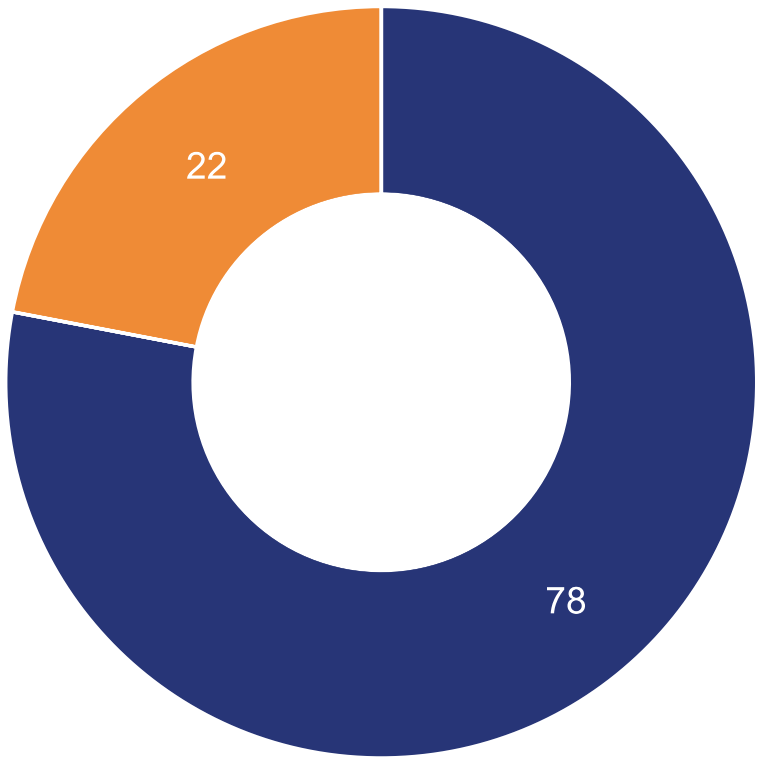
Multiple Answers

Leisure Travel… How?

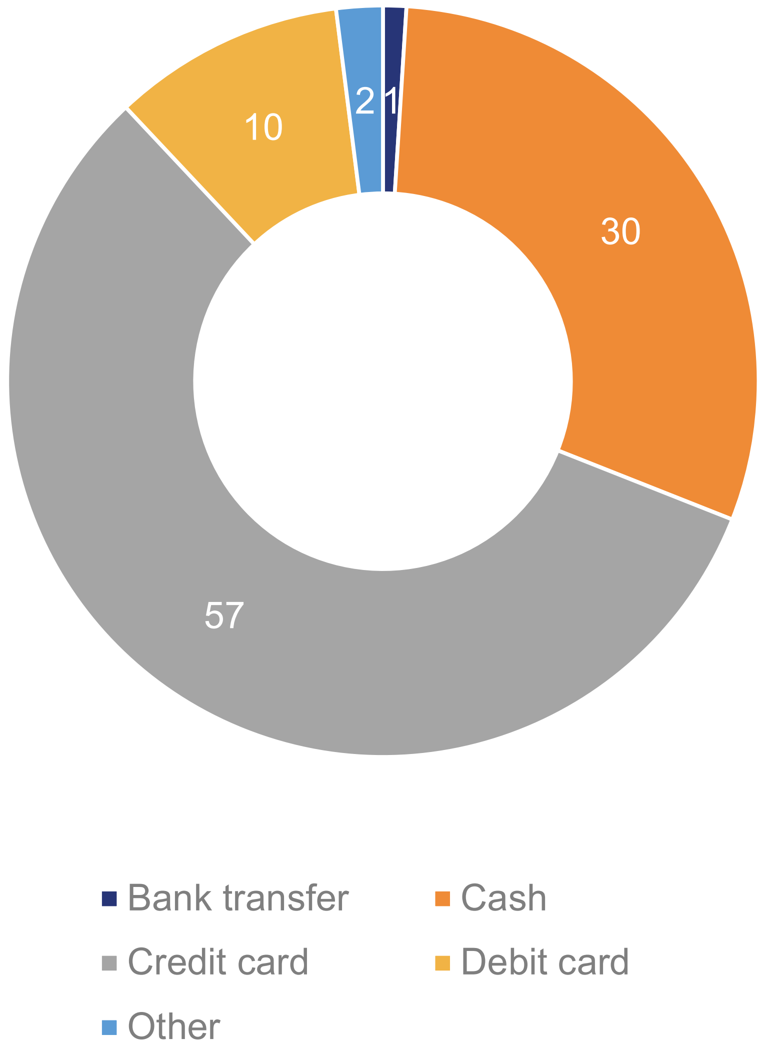
Search



Book

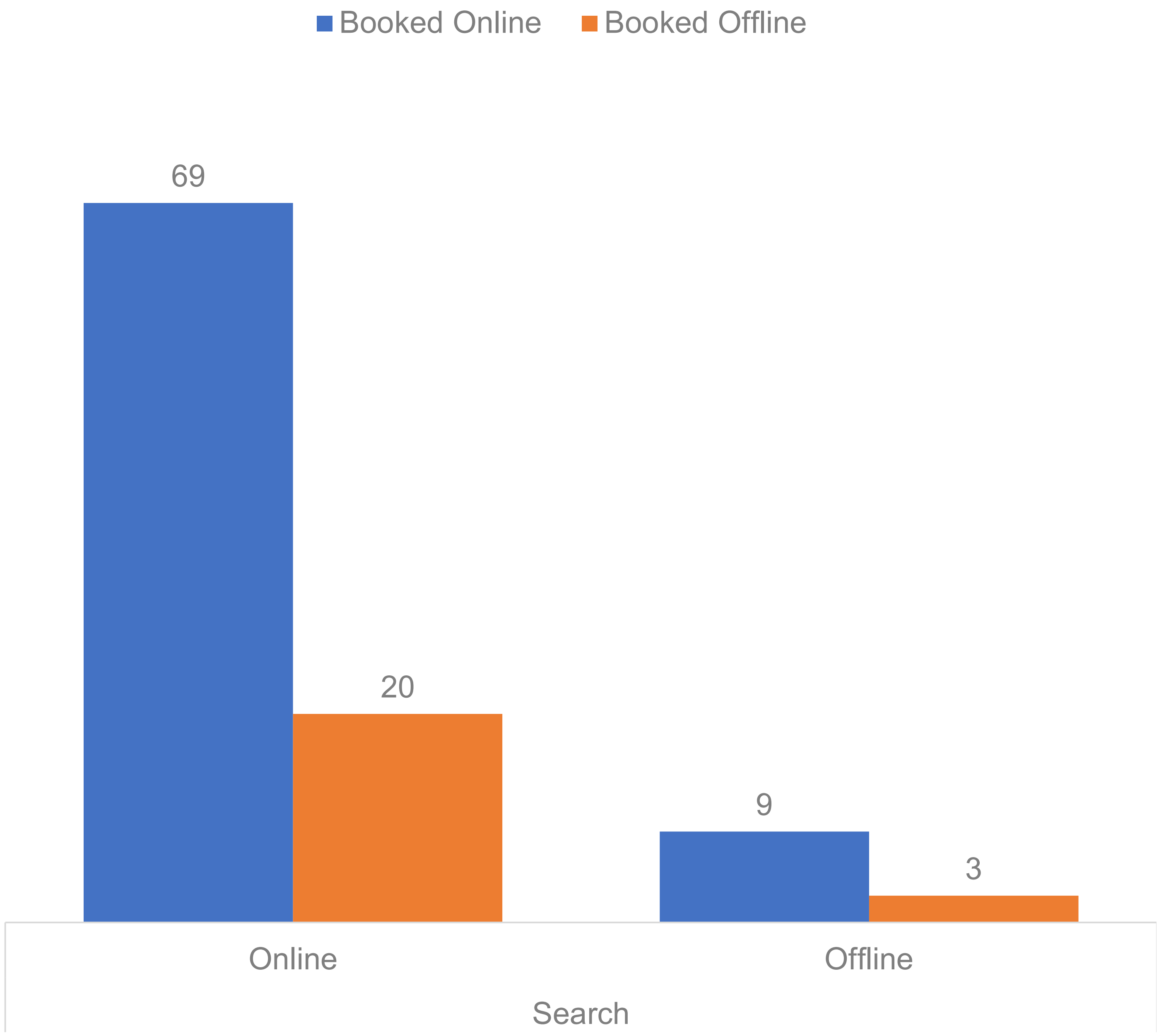


Pay



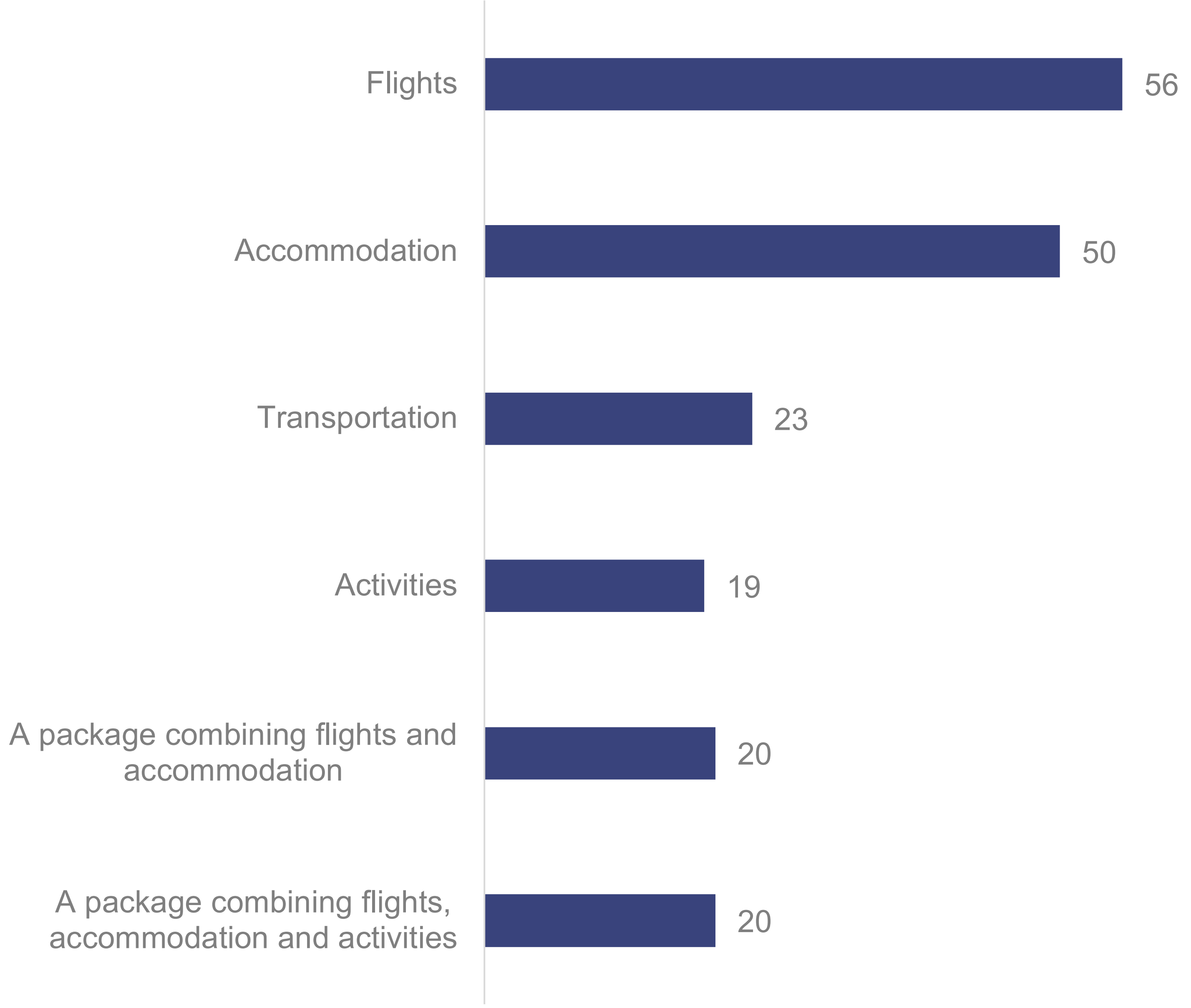
Search & Booking – Online vs. Offline

- Online savvy with 89% of search conducted online
- 69% is booked online, mainly for hotel and air, packages are booked the least online
- 20% of travel is still booked offline mostly searched online
- Online search is used for shopping and comparing prices with Trivago and TripAdvisor

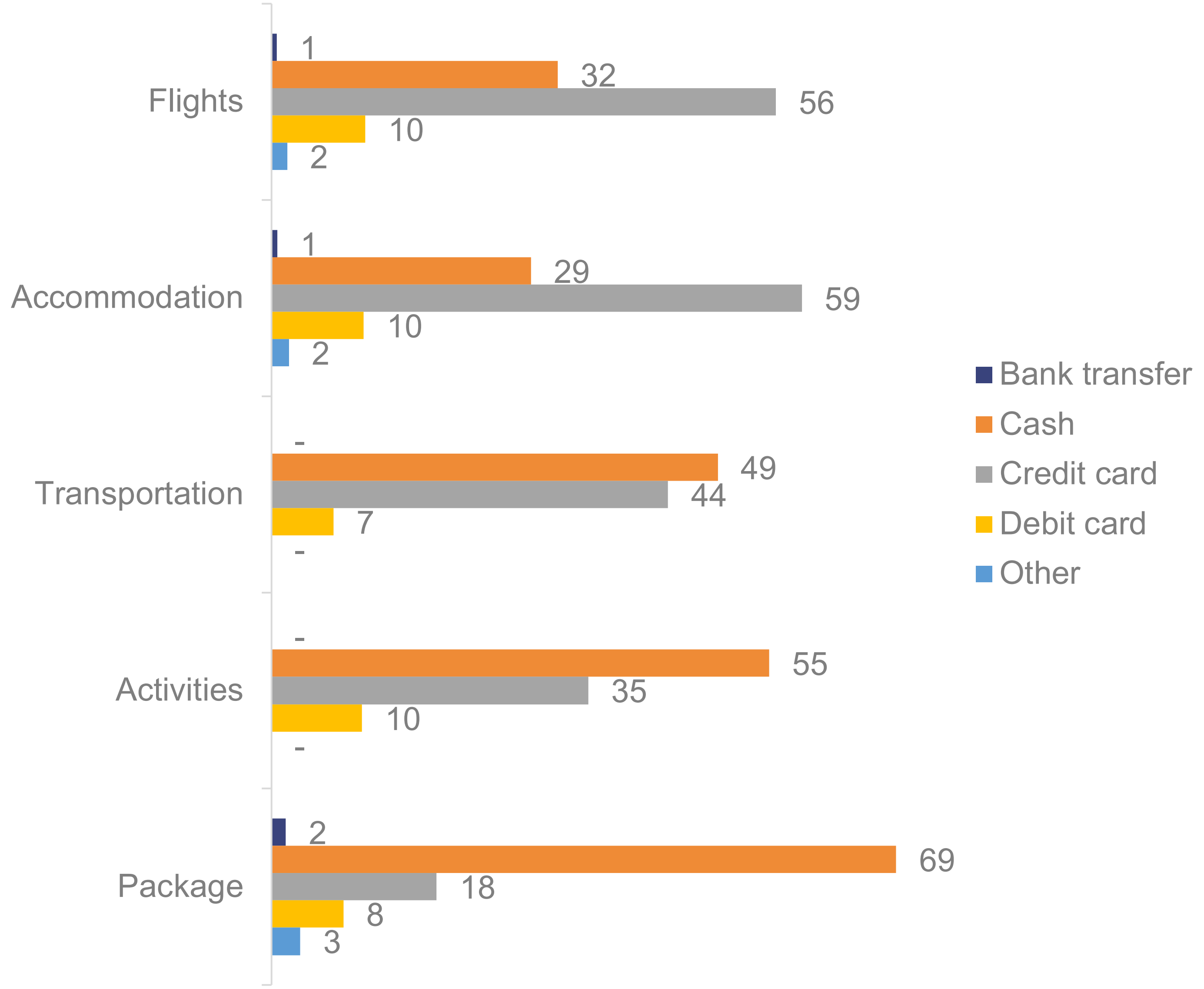


Actual booking

Element booked



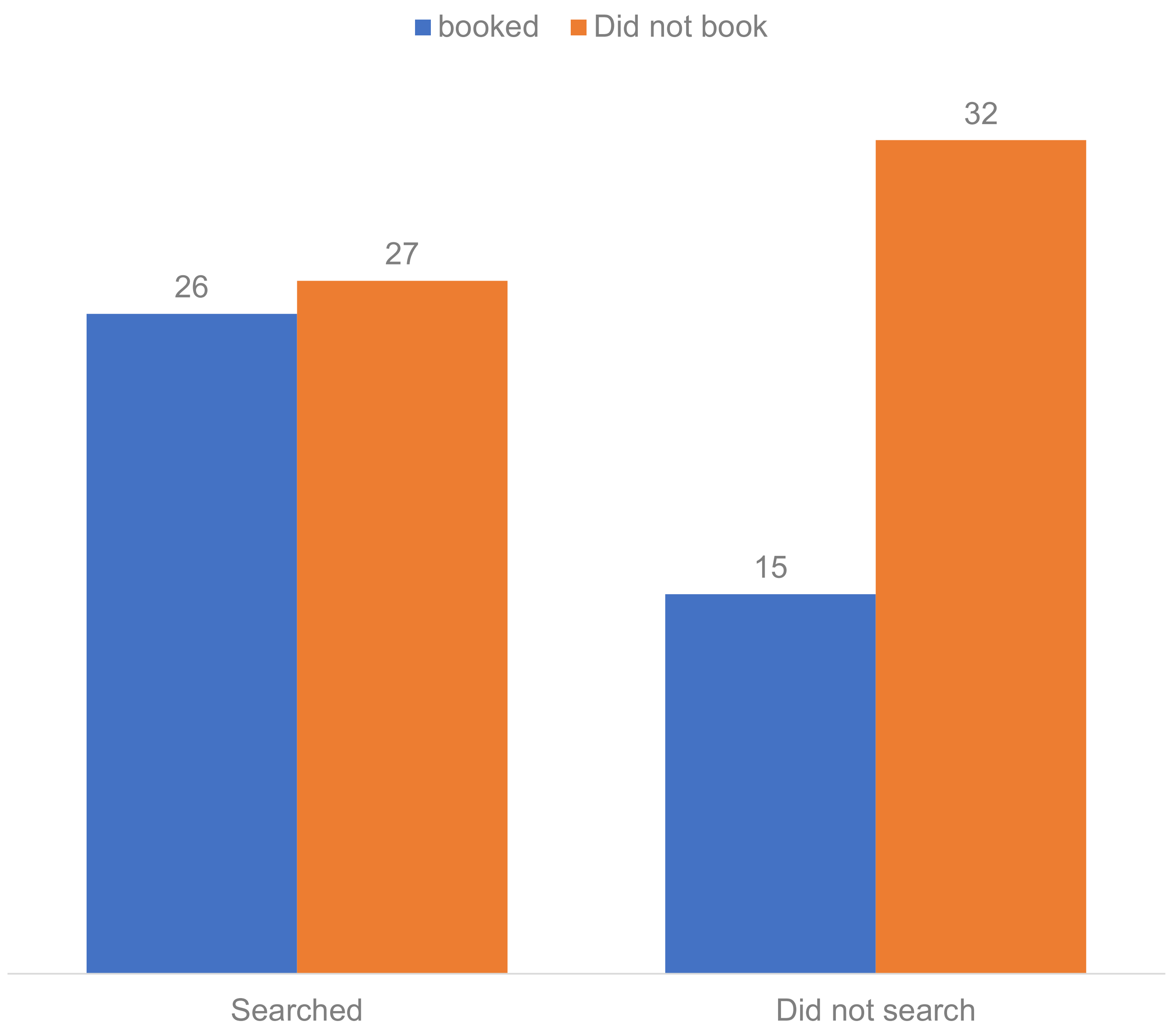
Payment method



Multiple Answers

Package Search vs. Booking

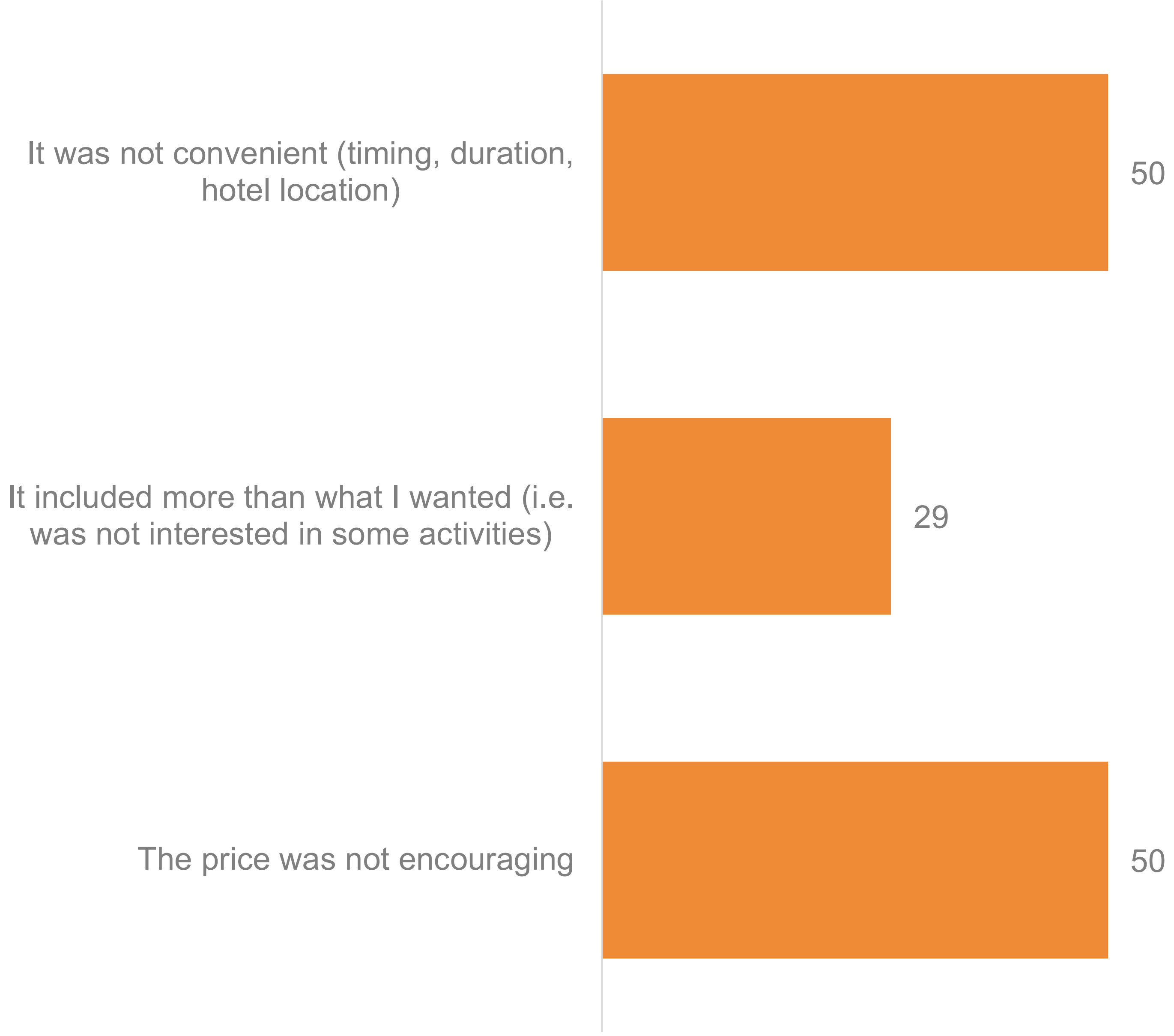
- Market for packages at 68% (booked &/or shared)
- 50% felt the Package price was not encouraging and Package was not convenient as defined
- Shopping (46%) and Sightseeing (41%) , are the activities driving Levant travellers choice



Choosing Packages

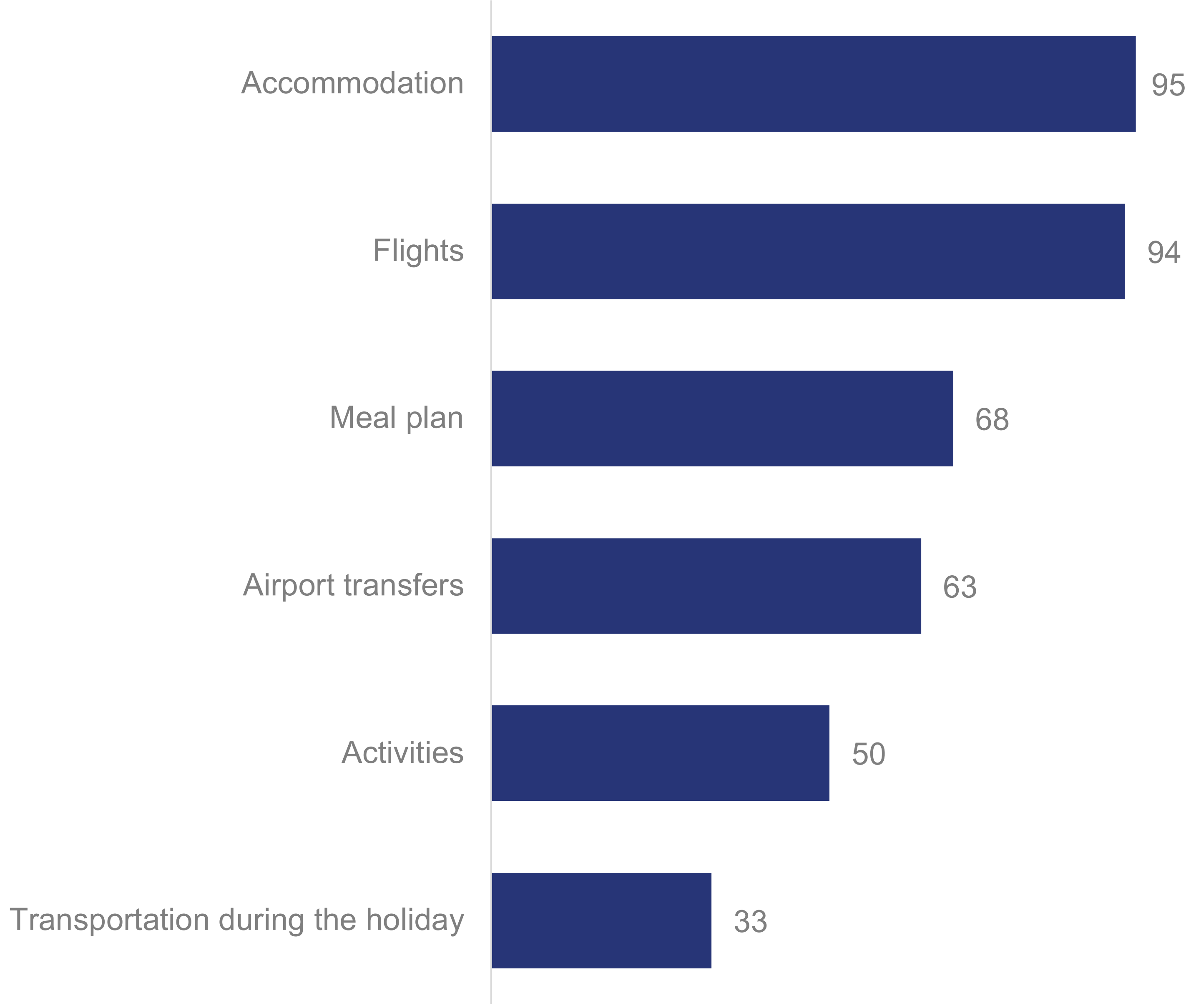
… to Package

… not to Package

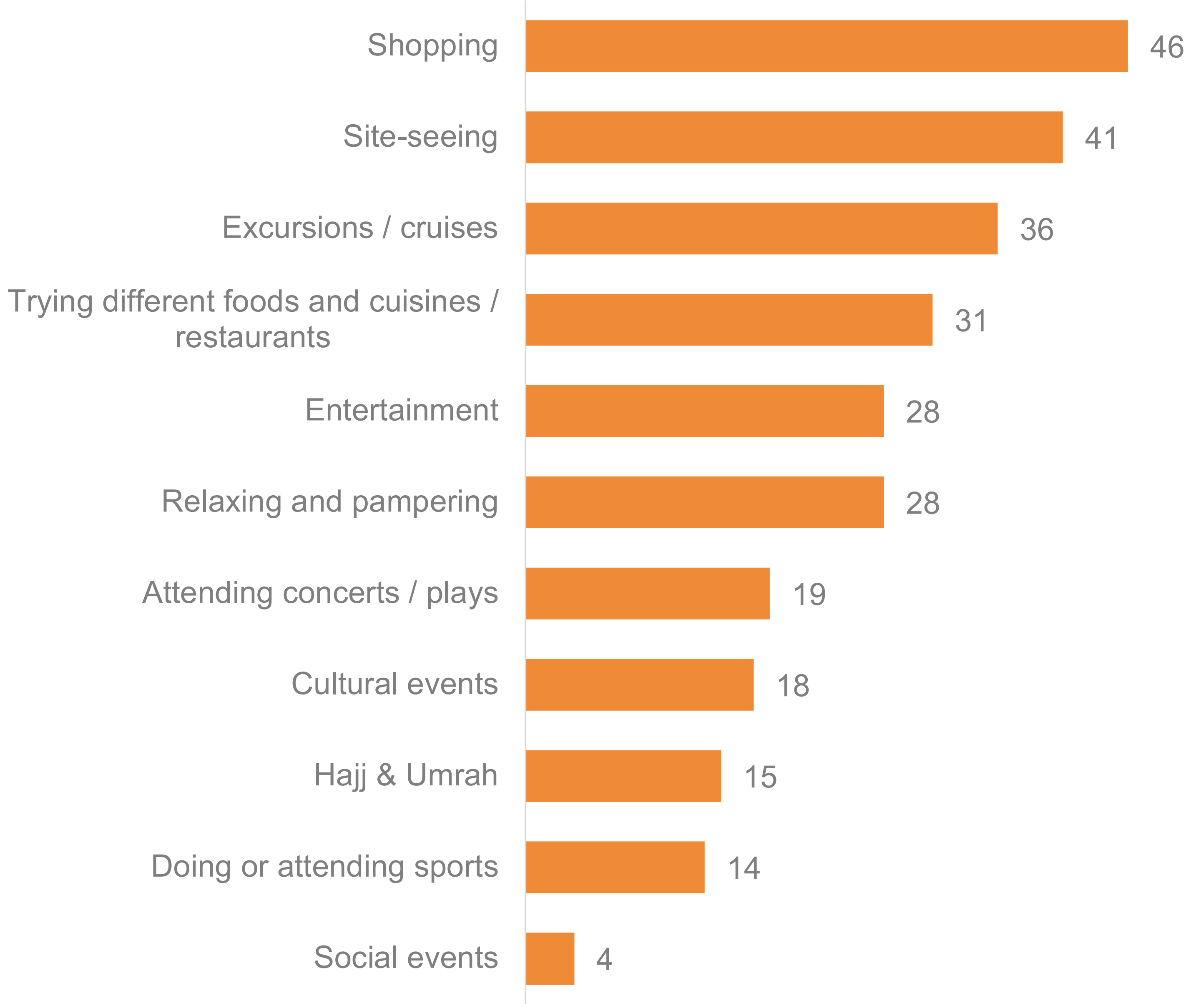


Package Components

Components



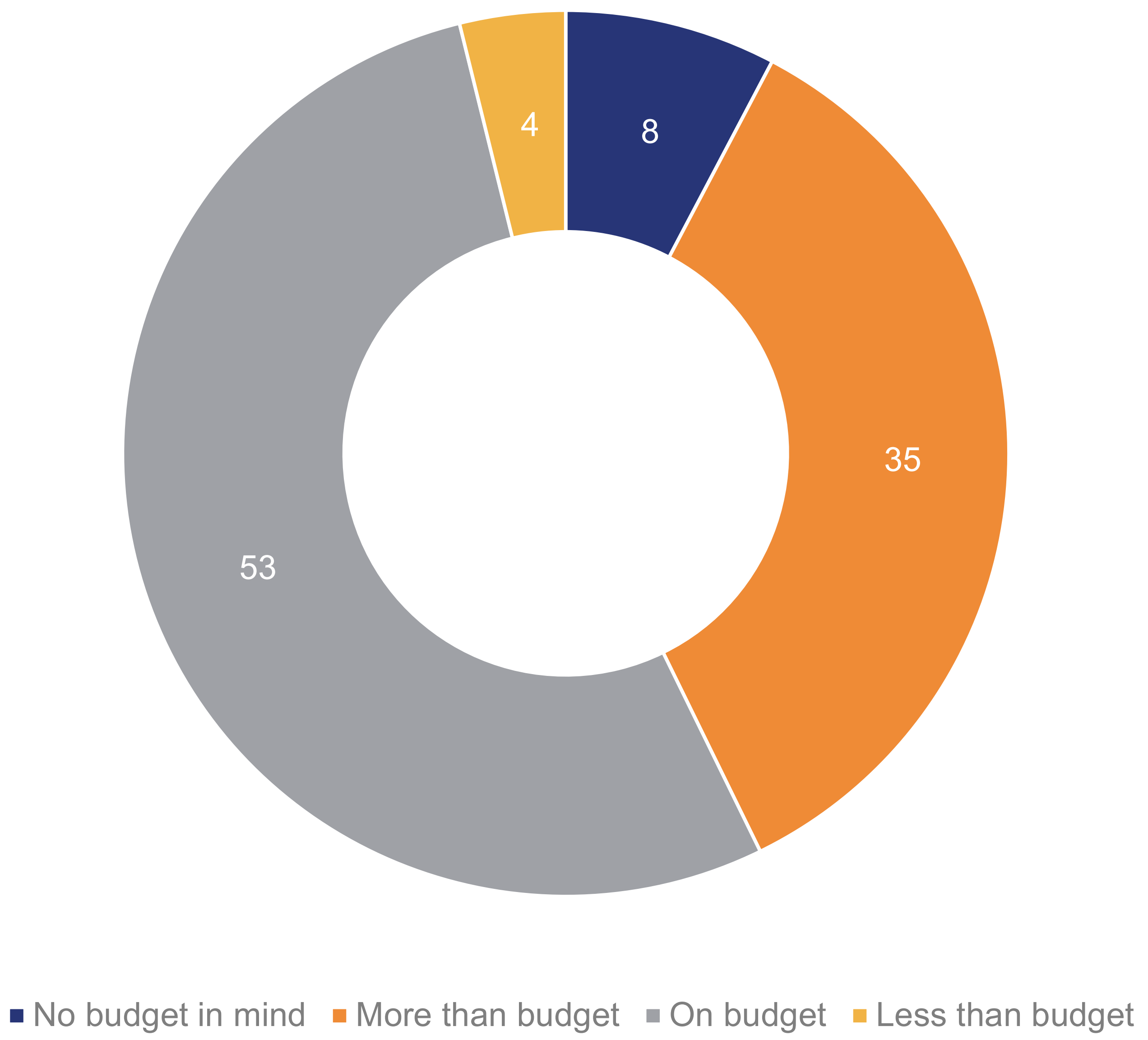
Activities



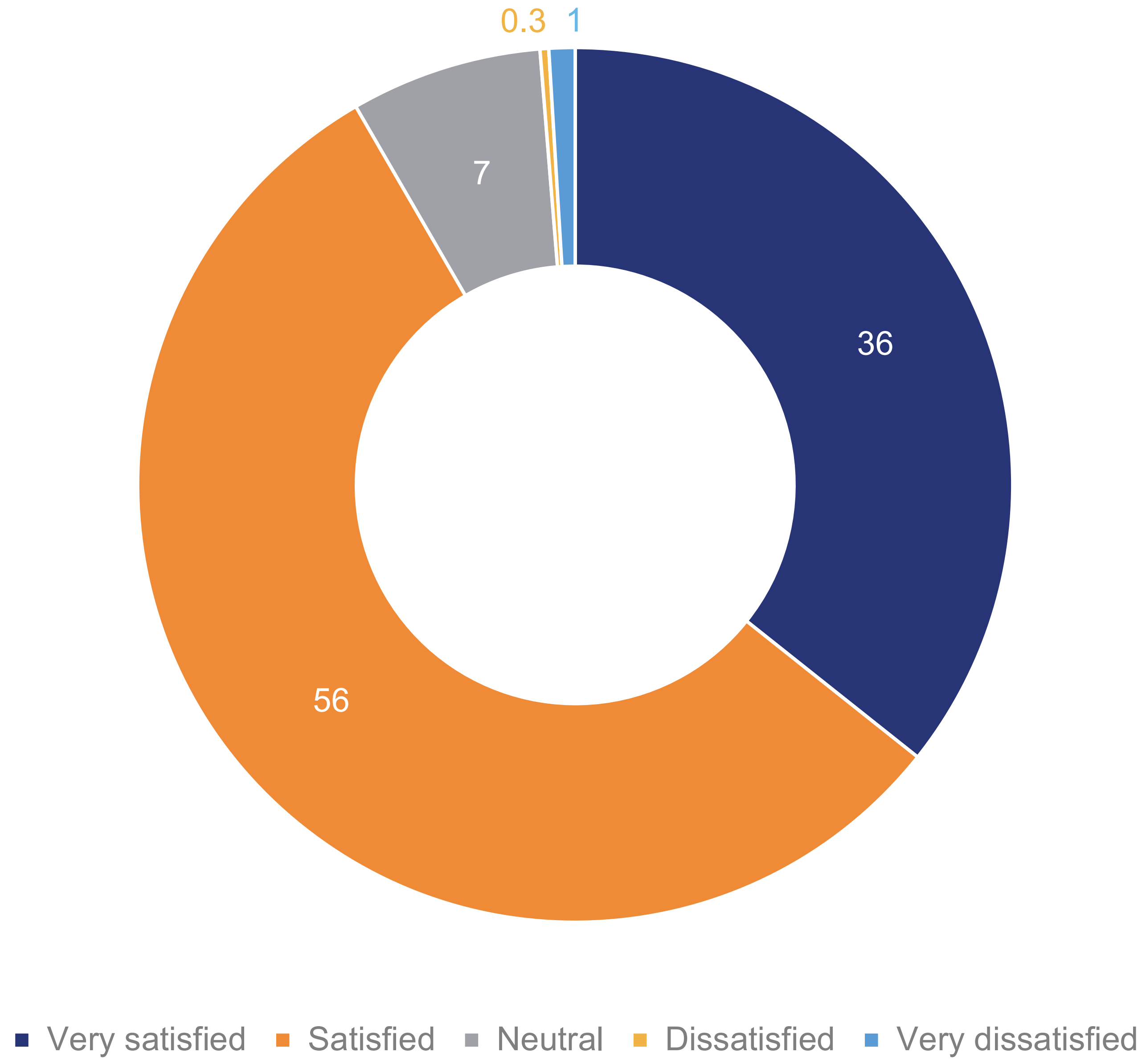
Multiple Answers

Post-Booking

Amount Spent

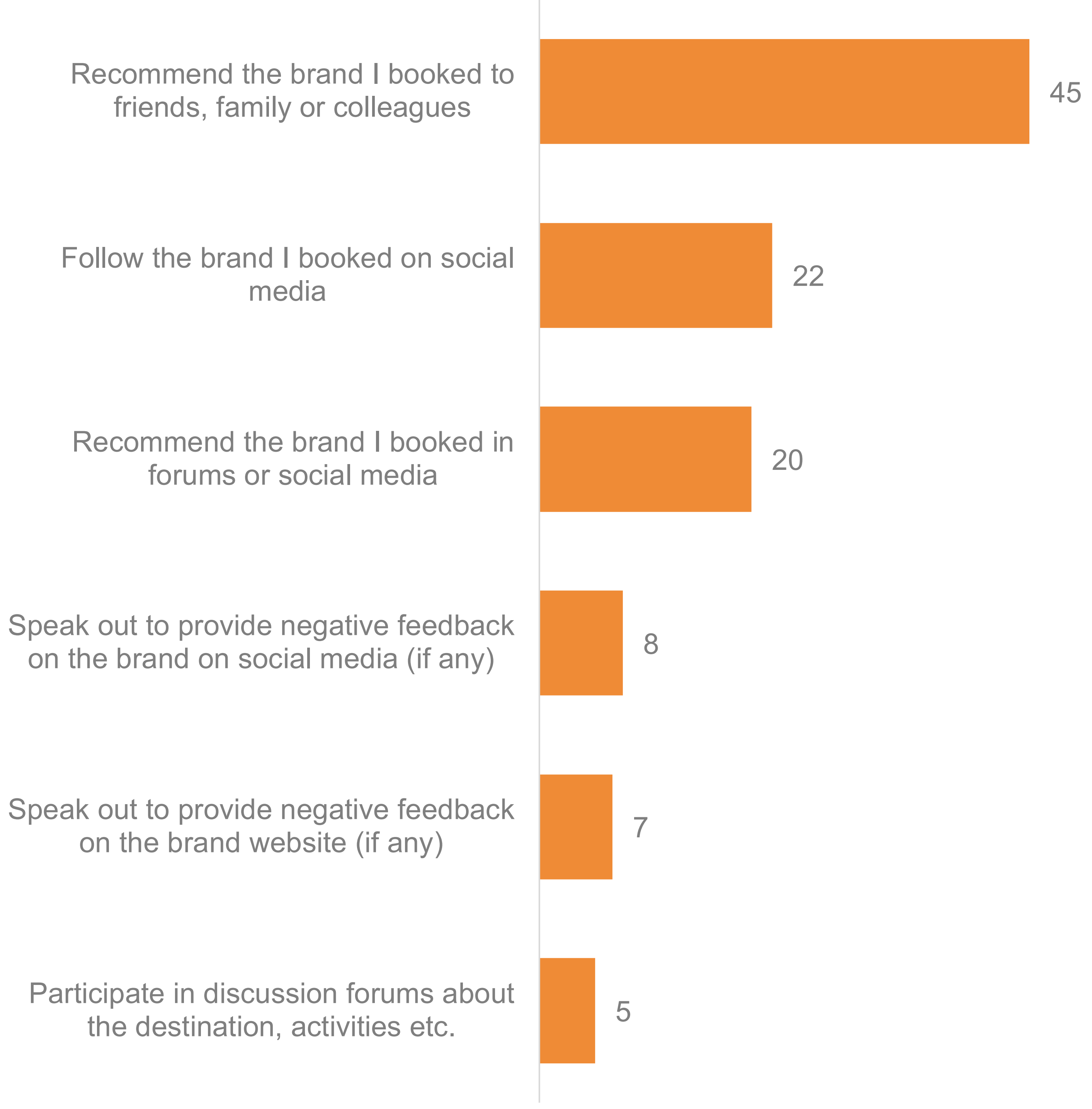


General Satisfaction with the leisure booking



Experience & Sharing

- 45% confirm sharing feedback post trip with their FF&C repeating the cycle
- Only 22% recommend a brand booked on social media
- In the event of negative experience, only few will speak out on the brand website of the supplier (7%) or social media page of the brand (8%)



Multiple Answers

Business Travel

Pattern

How?

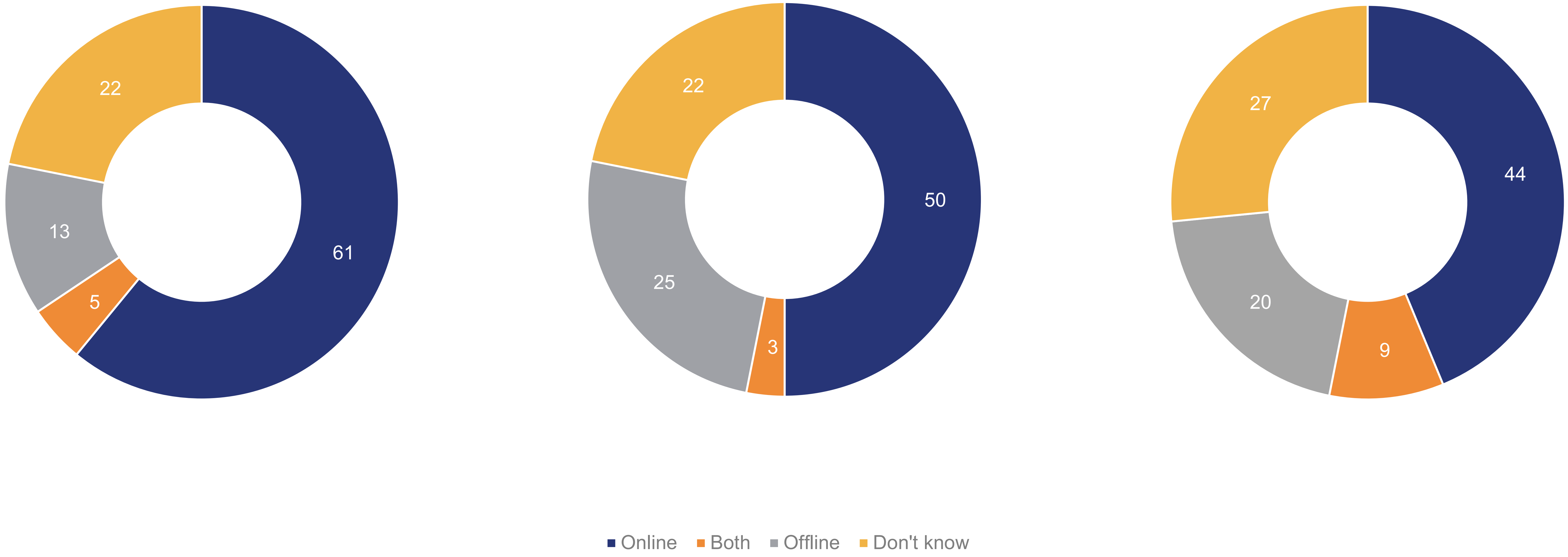
Who?

Highlights Emerging from Study

- Most of the business travel is once or twice a year and one third of business travel has extended length of 3 night-stays
- 61% of search is conducted online however 50% only for booking
- 41% of business travel is booked by company, 22% by the travel agents and 38% by the traveller direct

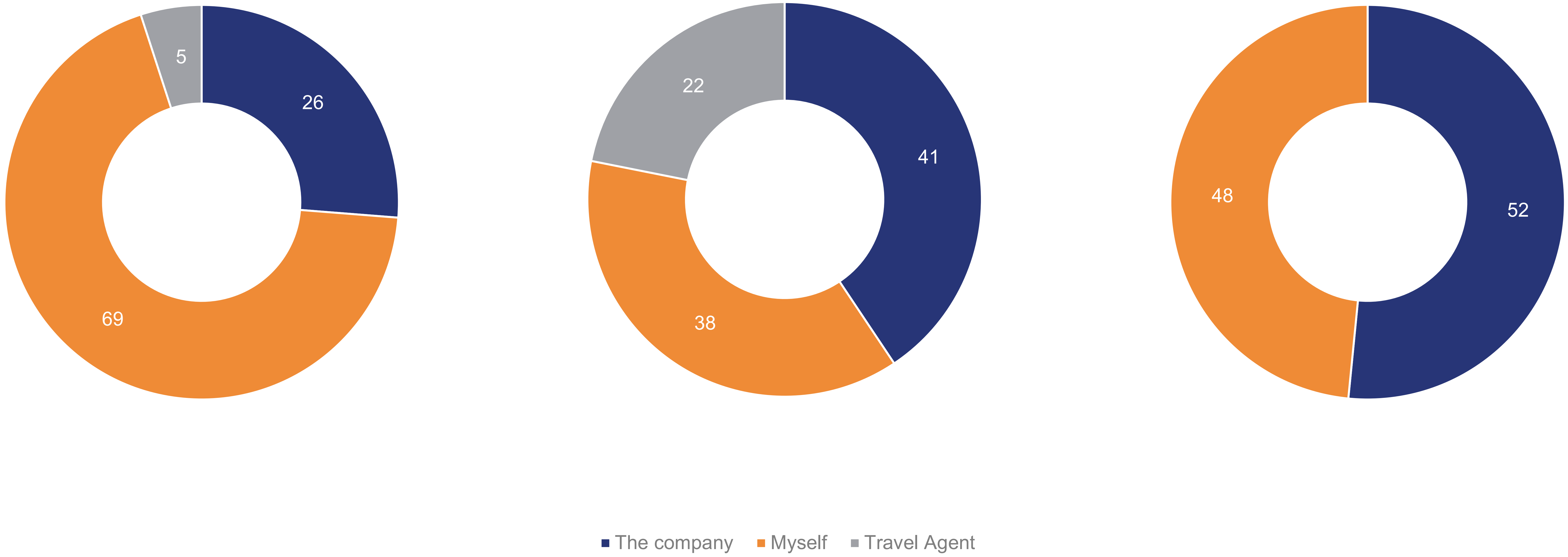
Business Travel… How?

Search | **Book** | **Pay**

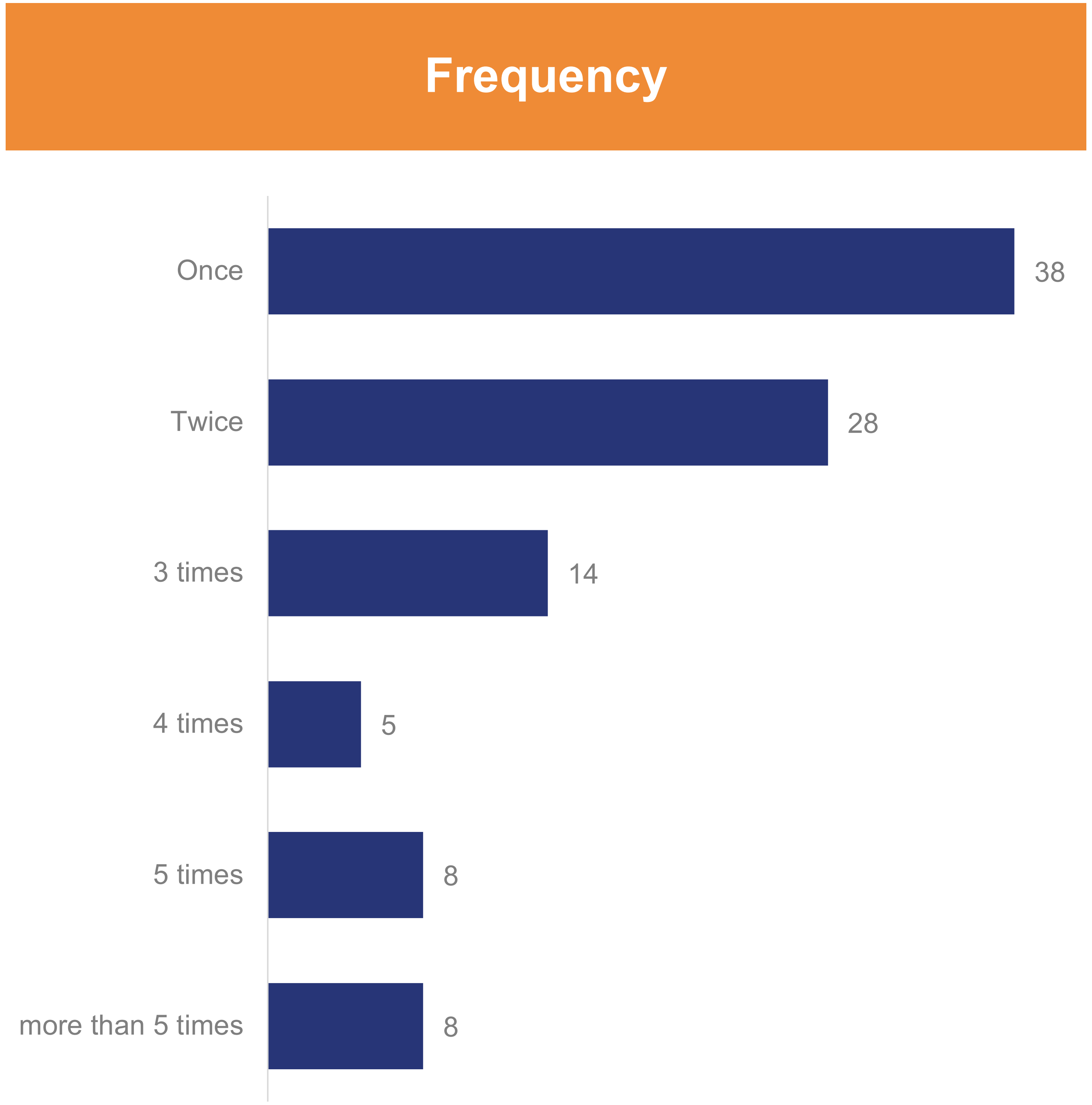


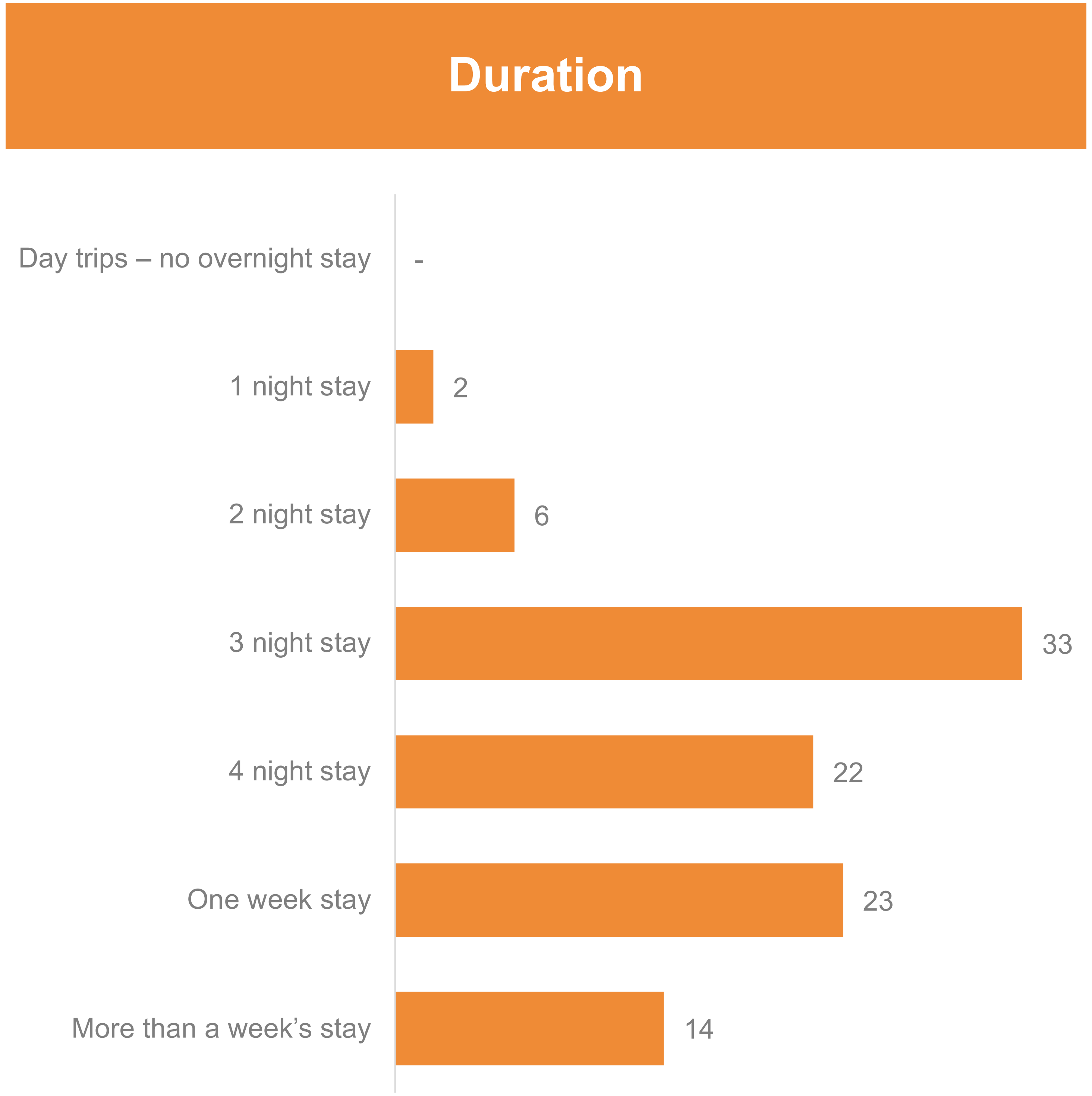
Business Travel… Who?

Search | **Book** | **Pay**



Business Travel





What we suspected is confirmed.

Real customer surveys to validate what we knew to be true and empowering businesses with knowledge to shape and strengthen their proposition.

Our eyes are wide-open and we know what is important to today's Middle East traveler.

INSIGHT OUT

THANK YOU

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