A Custom Report Commissioned by:

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

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Lead Oversee

Field Agencies

Quantitative Surveys

Focus Groups
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.
Research Methodology

**DESK RESEARCH**
100+
Analysis of existing reports, articles and databases

**TRAVEL TRADE INTERVIEWS**
23
Interviews with trade executives

**CONSUMER FOCUS GROUP DISCUSSIONS**
6
Focus group discussions held in 3 key markets (UAE, KSA, Egypt)

**QUANTITATIVE QUESTIONNAIRE**
1953
Interviews with travel customers carried out across 9 countries

**ANALYSIS**

*Triangulation of market, travel trade & research findings*

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

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

Face to face and online surveys providing a representative sample of the defined region.
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
Sample Composition
Travel Mindset when Booking Travel
Traveller's Demographics Summary

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”
Travel

Frequency
- Once: 31
- Twice: 25
- 3 Times: 13
- 4 Times: 10
- 5 Times or more: 21

Destination
- Domestic: 20
- Regional: 39
- Home country & VFF: 21
- International: 64

Companionship
- Family: 57
- Solo: 18
- Friends: 15
- Equally: 10

Multiple Answers
- Europe: 27
- Africa: 6
- Asia: 21
- America: 7
- Other: 3
Mindset When Booking Travel

Motive for travelling

<table>
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<th>Motive</th>
<th>Frequency</th>
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<tr>
<td>Like travelling</td>
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<tr>
<td>Spoil myself</td>
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<tr>
<td>Discover the world</td>
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<tr>
<td>Make a change in my lifestyle</td>
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<tr>
<td>Treat my family</td>
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<td>Time of the year when everyone goes</td>
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<td>Annual home visits</td>
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<tr>
<td>Persuaded by a friend/colleague</td>
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<tr>
<td>Make the most of a great promotion</td>
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<td>Business meetings or work</td>
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<td>Prompted by a change in life</td>
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<td>Study, training, courses</td>
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<tr>
<td>Follow social expectations</td>
<td>1</td>
</tr>
<tr>
<td>Regular health check-ups / treatments</td>
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<tr>
<td>Nothing to do at home</td>
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</tr>
</tbody>
</table>

Tech savviness

- 1 New technology tends to make me feel anxious
- 2
- 3
- 4
- 5 I generally feel empowered by technology

Scale from 1-5, 5 being most tech savvy
Mindset When Booking Travel

**Exploration**
- I take my time searching for the best options for choice and price: 52%
- I tend to do a quick search, and use help from travel agents, flight & hotel comparison sites: 20%
- I know exactly what I want, and focus on making the booking quickly: 28%

**Pre-Determination**
- Accommodation: 52%
- Destination: 49%
- Budget: 47%
- Duration: 46%
- Flight: 43%
- Activities: 41%
- None: 2%
- 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
Travel Patterns

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

- **Once a year**: 31
- **Twice a year**: 25
- **Three times a year**: 13
- **Four times a year**: 10
- **Five time a year or more**: 21

Base: Frequency

- **By Domestic**
  - Once a year: 1
  - Twice a year: 9
  - Three times a year: 17
  - Four times a year: 21
  - Five time a year or more: 21

- **By Regional**
  - Once a year: 4
  - Twice a year: 15
  - Three times a year: 23
  - Four times a year: 24
  - Five time a year or more: 18

- **By Home country**
  - Once a year: 33
  - Twice a year: 26
  - Three times a year: 20
  - Four times a year: 19
  - Five time a year or more: 27

- **By International**
  - Once a year: 62
  - Twice a year: 49
  - Three times a year: 40
  - Four times a year: 35
  - Five time a year or more: 34
By Destination

Multiple Answers  Base: Destination

- **Domestically**: 45
  - Once: 2
  - Twice: 16
  - 3 Times: 17
  - 4 Times: 19
  - 5 Times or more: 19

- **Regionally**: 29
  - Once: 11
  - Twice: 22
  - 3 Times: 11
  - 4 Times: 26

- **Home Country**: 35
  - Once: 12
  - Twice: 24
  - 3 Times: 19
  - 4 Times: 16

- **Internationally**: 22
  - Once: 10
  - Twice: 26
  - 3 Times: 12
  - 4 Times: 30
Travel Frequency by Origin

- **Egypt**
  - Once a year: 53
  - Twice a year: 13
  - Three times a year: 12
  - Four times a year: 6
  - Five time a year or more: 11

- **GCC**
  - Once a year: 25
  - Twice a year: 21
  - Three times a year: 15
  - Four times a year: 12
  - Five time a year or more: 11

- **Levant**
  - Once a year: 27
  - Twice a year: 27
  - Three times a year: 11
  - Four times a year: 8
  - Five time a year or more: 11

- **GCC Arab Expats**
  - Once a year: 29
  - Twice a year: 24
  - Three times a year: 14
  - Four times a year: 12
  - Five time a year or more: 21

- **GCC Indian Sub-Cont. Expats**
  - Once a year: 28
  - Twice a year: 23
  - Three times a year: 17
  - Four times a year: 14
  - Five time a year or more: 23

- **GCC Nationals**
  - Once a year: 34
  - Twice a year: 20
  - Three times a year: 12
  - Four times a year: 11
  - Five time a year or more: 20

- **GCC Western & Other Expats**
  - Once a year: 28
  - Twice a year: 25
  - Three times a year: 15
  - Four times a year: 17
  - Five time a year or more: 15
Travel Destinations by Origin

GCC Arab Expats
- Home Country: 15
- Domestic: 40
- Regional: 40
- International: 59

GCC Indian Sub-Cont. Expats
- Home Country: 18
- Domestic: 24
- Regional: 62
- International: 51

GCC Nationals
- Home Country: 8
- Domestic: 17
- Regional: 40
- International: 74

GCC Western & Other Expats
- Home Country: 15
- Domestic: 27
- Regional: 44
- International: 68
“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
• 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).
Destinations & Duration

The Most Visited Destinations

LONG TRIP / HAUL

SHORT TRIP / HAUL

DOMESTIC
• 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.

• 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.

• Levant, Egypt and Saudi Arabia:
  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.

• Indian Ocean:

LONG TRIP / HAUL

SHORT TRIP / HAUL

DOMESTIC
Domestic Travel

**Reasons**

- More convenient for short breaks: 49
- Many domestic leisure destinations to explore: 48
- I get to travel more for the same budget: 34
- I don’t get long enough holidays to go abroad more: 26
- Difficult to get visas: 15
- Many destinations don’t have halal food: 7
- Don’t like flying: 4
- Many destinations don’t speak my language: 4

**Duration**

- 1 night stay: 4
- 2 night stay: 23
- 3 night stay: 33
- 4 night stay: 15
- One week stay: 18
- More than a week’s stay: 1
- Day trips – no overnight stay: 5

**Payment**

- Online: 62
- Offline: 23
- On arrival: 34

Base: Domestic Travellers
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
Traveller’s Awareness, Mindset & Search Points

INSIGHT

Traveller’s Awareness
Active Awareness
Top-of-Mind Awareness
Online Search Points
Offline Search Points
Search Points
Decision Process: Who Decides?

OUT
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

Sources of travel info

- Read online reviews to keep up-to-date with new offers: 29
- Noticed and reflected on advertising in print magazines: 11
- Noticed and reflected on advertising on the internet: 19
- Visited travel websites to browse: 39
- Visited a travel agency to see what's new: 25
- Spoke with friends/family/colleagues about travel: 44
- Followed travel vloggers/bloggers: 16
- Watched travel TV programmes: 14
- Signed up for e-mail newsletters: 11
- Followed travel providers on social media (e.g. Airlines, Hotels on Twitter, Facebook): 25
- Read travel print magazines: 10
- Searched for travel ads by tour operators/travel agents (online or offline): 28
- None of the above: 2

Active
Travel Brands That First Come to Mind…

Egypt

- Egypt Air: 25
- Booking.com: 21
- Trivago. Com: 12
- Misr Travel: 10
- Emirates Airlines: 8
- Emirates Holidays: 7
- Trip Advisor: 6
- Saudia Airways: 6
- Isis: 4
- Qatar Airways: 3
- Almosafer: 3
- Wego: 3
- Sky Scanner: 3
- Gulf Air: 2
- Travco: 2
- Al Tayyar: 2
- Thomas Cook: 2

GCC

- Booking.com: 17
- Trivago. Com: 10
- Qatar Airways: 9
- Regency Holidays: 8
- Emirates Holidays: 6
- Dnata Travel: 6
- Almosafer: 5
- Musafir: 5
- MakeMyTrip: 4
- Al Tayyar: 4
- Wego: 4
- Cleartrip: 4
- Bahwan Travel: 4
- Trip Advisor: 4
- Ethihad Holidays: 4
- Cozmo Travel: 3
- Kanoo Travel: 3
- Expedia: 3
- Holiday Factory: 3
- Al Emadi Travel: 2
- Tajawal: 2

Levant

- Dallas Travel: 31
- Nakhal: 23
- Mawakeb: 14
- Booking.com: 12
- Wild Discovery: 12
- Expedia: 8
- Tania Travel: 8
- Kurban Travel: 8
- Holiday International: 5
- Royal Jordanian: 5
- Trivago. Com: 5
- Jazeera Airways: 5
- 5 Stars: 5
- Trip Advisor: 5
- Barakat Travel & Holidays: 4
- Al Good: 3
- Samad: 2
- Lamis: 2
- Qatar Airways Holidays: 2
- AirBnB: 2
- Orient Travels: 2
- Dakkak Travel: 2
- Holiday Inn: 2
- New Plaza Tours: 2
## Top-of-Mind Brands

### GCC Nationals

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<tr>
<th>Brand</th>
<th>Rank</th>
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<td>Almosafir</td>
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<td>Qatar Airways</td>
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<td>Trivago. Com</td>
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<td>Al Tayyar</td>
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<td>Bahwan Travel</td>
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<td>Musafir</td>
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### GCC Arab Expats

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<td>Regency Holidays</td>
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### GCC Indian Sub-Cont. Expats

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<td>Acon Travel</td>
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<td>Snata</td>
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### GCC Western & Other Expats

<table>
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<td>Cozmo Travel</td>
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<td>Musafir</td>
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<td>Al Tayyar</td>
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<td>Tajawal</td>
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## Top-of-Mind Brands by Country of Residence

### UAE

<table>
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<td>MakeMyTrip</td>
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<td>Musafir</td>
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<td>Etihad Holidays</td>
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<td>Trip Advisor</td>
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<td>Holiday Factory</td>
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<td>Expedia</td>
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<td>Air Arabia</td>
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<td>Thomas Cook</td>
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<td>Emirates Airlines</td>
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<td>Sky Scanner</td>
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### KSA

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<td>Al Tayyar</td>
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<td>Tajawal</td>
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### QATAR

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## Top-of-Mind brands by Country of Residence

### Kuwait

<table>
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<td>Yamsafer</td>
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<tr>
<td>Fly Dubai</td>
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<td>Sky Scanner</td>
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<td>Misr Travel</td>
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### Oman

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<td>Marmul Travel</td>
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<td>House of Travel</td>
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<tr>
<td>NTT</td>
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<tr>
<td>Al Hashar Tourism &amp;…</td>
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<tr>
<td>Cox and Kings</td>
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<tr>
<td>AlMotahida</td>
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<td>Thomas Cook</td>
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<td>MakeMyTrip</td>
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<td>Yatra.com</td>
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<td>Trip Advisor</td>
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<td>Al Hesn Travel</td>
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<td>Blue Moon</td>
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<td>El Manar Travel</td>
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<td>Galaxy</td>
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<td>Labyek</td>
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<tr>
<td>Al Bidah Travel and…</td>
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</table>
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

<table>
<thead>
<tr>
<th>Process</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Compared flight prices on-line</td>
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<tr>
<td>Compared accommodation prices on-line</td>
<td>44</td>
</tr>
<tr>
<td>Checked online for activities to do at destination</td>
<td>38</td>
</tr>
<tr>
<td>Searched for discounts on-line</td>
<td>33</td>
</tr>
<tr>
<td>Visited travel providers' websites to learn more about specific products</td>
<td>31</td>
</tr>
<tr>
<td>Read online reviews by customers</td>
<td>30</td>
</tr>
<tr>
<td>Searched for packages on-line</td>
<td>30</td>
</tr>
<tr>
<td>Read online reviews by travel experts</td>
<td>26</td>
</tr>
<tr>
<td>Watched videos</td>
<td>25</td>
</tr>
<tr>
<td>Read sources such as general consumer advice</td>
<td>25</td>
</tr>
<tr>
<td>Used forums/social networking sites</td>
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</tr>
<tr>
<td>Followed up on links in emails from travel providers</td>
<td>17</td>
</tr>
<tr>
<td>Clicked on a banner ad</td>
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</tbody>
</table>

#### Top websites

<table>
<thead>
<tr>
<th>Website</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Booking.com</td>
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<td>Emirates Airlines</td>
<td>18</td>
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<td>Wego</td>
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<td>Yamsafer</td>
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<td>AirBnB</td>
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<td>Holiday Factory</td>
<td>8</td>
</tr>
<tr>
<td>Etihad Holidays</td>
<td>8</td>
</tr>
</tbody>
</table>
Offline Search Points

Process

- Asked for opinions and recommendations from friends, family, colleagues: 48
- Visited a travel agency to compare products and prices: 34
- Visited a travel agency to look for packages: 32
- Read about travel products in catalogues, flyers or postcards: 26
- Visited a travel agency spontaneously, without a specific goal in mind: 23
- Read articles about travel products in a magazine: 22

Top Agents

1. Kanoo Travel: 12
2. AMEX Travel: 12
3. Travco: 9
4. Thomas Cook: 9
5. Dnata Travel: 8
6. Fursan Travel: 8
7. Emirates Holidays: 7
8. Misr Holidays: 7
9. Al Tayyar Travel Group: 7
10. Etihad holidays: 5
11. Qatar Airways Holidays: 4
12. Cozmo Travel: 3
13. Regency Holidays: 3
14. Nakhal: 3
15. Al Futtaim: 3
16. Omeir Travel: 2
17. Al Rostomani Travel: 2
18. Wild Discovery: 2
19. Orient Travel: 2
20. Dallas: 2
21. Bahwan Travel: 2
22. Snata: 2
23. Astra Travel: 2
24. Kurban: 2
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?

Me only  Me, with help from others

<table>
<thead>
<tr>
<th>Region</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>GCC ARAB EXPATS</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>GCC INDIAN SUB-CONT. EXPATS</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>GCC NATIONALS</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>GCC WESTERN &amp; OTHER EXPATS</td>
<td>51%</td>
<td>53%</td>
</tr>
<tr>
<td>Levant</td>
<td>51%</td>
<td>53%</td>
</tr>
</tbody>
</table>

44% Female  56% Male
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”
Influencers
Friends, Family & Colleagues
Social Media & Influencers
Offline Communication
Suppliers & Travel Agents
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
“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”
Considerations

General Considerations

Geopolitics and negative perception of the Destination

Visa requirements
General Considerations

Decision cycle

- Destination
- Budget
- Itinerary
- Brand to book
- Where to book
- Accommodation
- Activities
- Flight
- Duration

Device used for search

- Smartphone: 78
- Laptop: 60
- Desktop: 29
- Tablet: 16
- Phablet: 7

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 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.
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**
- Accommodation cost: 50
- Hotel location (city, resort, distance): 41
- Hotel classification (5-star, 4-star etc.): 38
- Hotel rating (customer feedback, reviews): 32
- Hotel’s policy on social responsibility / eco-friendly: 15

**Transportation**
- Cost of the flight tickets: 46
- Airline reputation (safety, services): 31
- Itinerary (stop overs, waiting times, duration): 29
- Other transportation costs (taxi, Uber, car rental): 23
- Airline reviews (customer feedback): 17
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
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
“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

<table>
<thead>
<tr>
<th>Online search</th>
<th>Offline search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compared flight prices online</td>
<td>Went to a travel agency to compare products and prices</td>
</tr>
<tr>
<td>Compared accommodation prices online</td>
<td></td>
</tr>
<tr>
<td>Searched for discounts online</td>
<td>Went to a travel agency to look for packages</td>
</tr>
<tr>
<td>Searched for packages online</td>
<td></td>
</tr>
</tbody>
</table>
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

- Destination
- Activities
- Transportation/flight
- Accommodation
- Duration
- Accommodation cost
- Transportation cost
- Activities cost
- Shortlisting options
- Package search
- Wait for the deal to materialize
- Make the actual booking

- Total search
- I came to a conclusion very quickly
- I spent a considerable amount of time
- I spent some time on this

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total Search</th>
<th>Came to a Conclusion</th>
<th>Spent Considerable Time</th>
<th>Spent Some Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
<td>42</td>
<td>9</td>
<td>43</td>
<td>40</td>
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<tr>
<td>Activities</td>
<td>48</td>
<td>12</td>
<td>36</td>
<td>30</td>
</tr>
<tr>
<td>Transportation/flight</td>
<td>47</td>
<td>11</td>
<td>36</td>
<td>30</td>
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<tr>
<td>Accommodation</td>
<td>51</td>
<td>14</td>
<td>37</td>
<td>30</td>
</tr>
<tr>
<td>Duration</td>
<td>41</td>
<td>6</td>
<td>35</td>
<td>30</td>
</tr>
<tr>
<td>Accommodation cost</td>
<td>54</td>
<td>11</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Transportation cost</td>
<td>54</td>
<td>14</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Activities cost</td>
<td>54</td>
<td>29</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Shortlisting options</td>
<td>48</td>
<td>17</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Package search</td>
<td>50</td>
<td>20</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Wait for the deal to materialize</td>
<td>51</td>
<td>30</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Make the actual booking</td>
<td>46</td>
<td>47</td>
<td>43</td>
<td>40</td>
</tr>
</tbody>
</table>
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
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)

- Accommodation: 58
- How much I should pay for accommodation: 57
- Available activities: 57
- How much I should pay for transportation: 55
- How much I should pay for activities: 54
- Duration of the trip: 52
- Itinerary: 51
- Destination: 44

### Trigger for making the booking

- Enough information to make a decision: 41
- Finances became available: 30
- Worried prices may increase: 6
- Found a package: 9
- Found an offer: 12
- Compelling advert: 2
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

- Online
- Offline

- Online
- Offline

- Bank transfer
- Cash
- Credit card
- Debit card
- Other
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

- Wanted to talk to a travel agent in-person: 31
- Able to find a good package: 28
- Friend/family member recommended an agent: 27
- More convenient to go into a travel agent: 26
- More information was available in agent’s office: 26
- Flexibility in managing bookings: 25
- Went to favourite agent: 25
- It was cheaper: 24
- Easier to reach a decision in agent’s office: 22
- Don’t trust online payments: 21
- Pricing structure was not clear / hidden charges: 18
- Free travel insurance: 15
- Popped in randomly: 15
- Advertisement for the agent: 15

#### Searched offline but booked online

- Better value online: 100
- More convenient: 90
- Found a good package online: 70
- More information about products available online: 67
- Easier to figure out which booking is right for me: 63
- Could find a wider range of products online: 60
- Offered clarity of prices / no hidden charges: 60
- Easier to find out about the range of products available: 50
- A friend/family member recommended I go to a particular website: 43
- Offered flexibility in managing my bookings (cancellation, changes): 43
- I was shopping on-line for something else and I saw the product: 33
- Offered payment on arrival: 23
- Provided product reviews or ratings: 20
- Offered a free travel insurance: 10

**Small base**
**Actual Booking**

### Component booked

- **Flights**: 60
- **Accommodation**: 56
- **Transportation**: 25
- **Activities**: 21
- **Package combining flights and accommodation**: 10
- **Package combining flights, accommodation and activities**: 16

### Payment method

- **Flights**: 2 (Bank transfer), 10 (Cash), 14 (Credit card), 10 (Debit card), 2 (Other)
- **Accommodation**: 2 (Bank transfer), 15 (Cash), 11 (Credit card), 11 (Debit card), 1 (Other)
- **Transportation**: 5 (Bank transfer), 13 (Cash), 36 (Credit card), 46 (Debit card), 1 (Other)
- **Activities**: 4 (Bank transfer), 13 (Cash), 34 (Credit card), 47 (Debit card), 1 (Other)
- **Package**: 3 (Bank transfer), 28 (Cash), 47 (Credit card), 55 (Debit card), 1 (Other)
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.
“Marketing needs to be mobile if you want our attention.

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

Package Search 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**
- More convenient (regardless of the price): 43
- Included more than I needed (i.e. encouraged me to do certain activities): 42
- The price was attractive: 48

**... not to Package**
- Not convenient (timing, duration, hotel location): 43
- Included more than I wanted (i.e. was not interested in some activities): 46
- Price was not attractive: 37
Package Components

**Components**

- **Accommodation**: 92%
- **Flights**: 88%
- **Airport Transfers**: 65%
- **Meal Plan**: 63%
- **Activities**: 55%
- **Transportation during the holiday**: 43%

**Activities**

- **Sight-seeing, visiting tourist attractions**: 67%
- **Shopping**: 65%
- **Relaxing and pampering**: 49%
- **Excursions / cruises**: 47%
- **Trying different foods and cuisines / restaurants**: 41%
- **Cultural events**: 39%
- **Entertainment**: 35%
- **Playing or watching sports**: 28%
- **Attending concerts / plays**: 23%
- **Performing Hajj / Umrah**: 19%
- **Social events**: 10%
- **Health and medical**: 5%
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
“We understand the value of packages and want the freedom to customize them to suit our individual needs and requirements"
Post-Booking

Amount Spent

- No budget in mind: 57
- More than budget: 4
- On budget: 36
- Less than budget: 3

General Satisfaction

- Very satisfied: 37
- Satisfied: 49
- Neutral: 12
- Dissatisfied: 4
- Very dissatisfied: 1

Legend:
- Blue: No budget in mind
- Orange: More than budget
- Yellow: On budget
- Light orange: Less than budget
- Maroon: Very satisfied
- Red: Satisfied
- Gray: Neutral
- Green: Dissatisfied
- Light green: Very dissatisfied
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.
## Business Travel

### Frequency

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>26</td>
</tr>
<tr>
<td>Twice</td>
<td>29</td>
</tr>
<tr>
<td>3 times</td>
<td>20</td>
</tr>
<tr>
<td>4 times</td>
<td>10</td>
</tr>
<tr>
<td>5 times</td>
<td>5</td>
</tr>
<tr>
<td>more than 5 times</td>
<td>9</td>
</tr>
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</table>

### Duration

<table>
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<th>Duration</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day trips – no overnight stay</td>
<td>2</td>
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<tr>
<td>1 night stay</td>
<td>5</td>
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<tr>
<td>2 night stay</td>
<td>16</td>
</tr>
<tr>
<td>3 night stay</td>
<td>25</td>
</tr>
<tr>
<td>4 night stay</td>
<td>20</td>
</tr>
<tr>
<td>One week stay</td>
<td>21</td>
</tr>
<tr>
<td>More than a week's stay</td>
<td>11</td>
</tr>
</tbody>
</table>
Business Travel... How?

Search

Book

Pay

- Online
- Both
- Offline
- Don't know
Business Travel... How?

- Search:
  - The company: 71%
  - Myself: 7%
  - Travel Agent: 23%

- Book:
  - The company: 58%
  - Myself: 12%
  - Travel Agent: 31%

- Pay:
  - The company: 63%
  - Myself: 37%

Legend:
- The company
- Myself
- Travel Agent
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 overnight 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.
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 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
“Do you recognize us?

Do you understand our concerns? Motivations? Challenges?

What do our individual journey’s look like?”
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.
Sub-Group Specific
- Egypt
- GCC
- Levant
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

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

Frequency
- Once: 6
- Twice: 13
- 3 Times: 12
- 4 Times: 15
- 5 Times or more: 53

Destination
- Domestic: Multiple Answers 68
- Regional: Multiple Answers 66
- International: Multiple Answers 42

Companionship
- Solo: 22
- Family: 49
- Friends: 16
- Equally: 14

Regions
- Europe: 14
- America: 4
- Asia: 17
- Africa: 5
- Other: 2
Mindset When Booking Travel

**Motive for travelling**

- Like travelling: 34
- Spoil myself: 14
- Discover the world: 13
- Change my lifestyle: 12
- Treat my family: 6
- Time of the year when everyone goes: 6
- Annual home visits: 4
- Persuaded by a friend/colleague: 4
- Make the most of a great promotion: 2
- Business meetings or work: 2
- Prompted by a change in life: 2
- Study, training, courses: 1
- Following social expectations: 0.4
- Regular health check-ups / treatments: 0.4
- Nothing to do at home: 0.4

**Tech savviness**

- 1 - New technology tends to make me feel anxious: 12
- 2
- 3
- 4
- 5 - I generally feel empowered by technology: 23

- Total: 59
### Mindset When Booking Travel

#### Exploration

- **I like to explore different options and I take my time searching for the best options for choice and price**

- **I tend to do a quick search, and I use help from travel agent, flight & hotel comparison sites**

- **I know exactly what I want, and I focus on making the booking as quickly as possible**

#### Pre-Determination

- **Accommodation**
  - None: 57
  - Activities:
    - None: 32
    - Other: 42
  - Budget: 44
  - Destination: 47
  - Flight: 44
  - Duration: 45

- **Open**: 59
- **Committed**: 41
Travel Patterns by Frequency

- **Once a year**: 6 (Domestic: 7, Regional: 21, International: 71)
- **Twice a year**: 13 (Domestic: 34, Regional: 44)
- **Three times a year**: 12 (Domestic: 40, Regional: 40)
- **Four times a year**: 15 (Domestic: 46, Regional: 32)
- **Five times a year or more**: 53 (Domestic: 41, Regional: 33, International: 26)

Base: Frequency
Travel Patterns by Destination

Domestically
- Once: 1
- Twice: 12
- 3 Times: 12
- 4 Times: 13
- 5 Times or more: 18

Regionally
- Once: 1
- Twice: 12
- 3 Times: 13
- 4 Times: 13
- 5 Times or more: 16

Internationally
- Once: 6
- Twice: 12
- 3 Times: 10
- 4 Times: 14
- 5 Times or more: 59

Base: Destination

Multiple Answers
- Domestically: 68
- Regionally: 66
- Internationally: 42
# Domestic Travel

## Reasons

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number</th>
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<tbody>
<tr>
<td>More convenient for short breaks</td>
<td>71</td>
</tr>
<tr>
<td>Many domestic leisure destinations to explore</td>
<td>58</td>
</tr>
<tr>
<td>Can travel more for the same budget</td>
<td>54</td>
</tr>
<tr>
<td>Holidays are not long enough to travel internationally more often</td>
<td>29</td>
</tr>
<tr>
<td>Challenging to get visas</td>
<td>13</td>
</tr>
<tr>
<td>Many destinations don't have halal food</td>
<td>8</td>
</tr>
<tr>
<td>Don't like flying</td>
<td>-</td>
</tr>
<tr>
<td>Don't speak my language</td>
<td>-</td>
</tr>
</tbody>
</table>

## Duration

<table>
<thead>
<tr>
<th>Duration</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night stay</td>
<td>4</td>
</tr>
<tr>
<td>2 night stay</td>
<td>13</td>
</tr>
<tr>
<td>3 night stay</td>
<td>38</td>
</tr>
<tr>
<td>4 night stay</td>
<td>17</td>
</tr>
<tr>
<td>One week stay</td>
<td>21</td>
</tr>
<tr>
<td>More than a week's stay</td>
<td>4</td>
</tr>
<tr>
<td>Day trips – no overnight stay</td>
<td>4</td>
</tr>
</tbody>
</table>

## Payment

<table>
<thead>
<tr>
<th>Payment</th>
<th>Number</th>
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</thead>
<tbody>
<tr>
<td>Online</td>
<td>46</td>
</tr>
<tr>
<td>Offline</td>
<td>25</td>
</tr>
<tr>
<td>On arrival</td>
<td>50</td>
</tr>
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</table>

Multiple Answers
Awareness

Top-of-Mind

<table>
<thead>
<tr>
<th>Brand</th>
<th>Awareness</th>
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</thead>
<tbody>
<tr>
<td>Egypt air</td>
<td>25</td>
</tr>
<tr>
<td>Booking.com</td>
<td>21</td>
</tr>
<tr>
<td>Trivago. Com</td>
<td>12</td>
</tr>
<tr>
<td>Misr travel</td>
<td>10</td>
</tr>
<tr>
<td>Emirates Airlines</td>
<td>8</td>
</tr>
<tr>
<td>Emirates Holidays</td>
<td>7</td>
</tr>
<tr>
<td>Trip Advisor</td>
<td>6</td>
</tr>
<tr>
<td>Saudia airways</td>
<td>6</td>
</tr>
<tr>
<td>Isis</td>
<td>4</td>
</tr>
<tr>
<td>Qatar Airways Holidays</td>
<td>3</td>
</tr>
<tr>
<td>Almosafer</td>
<td>3</td>
</tr>
<tr>
<td>Expedia</td>
<td>3</td>
</tr>
<tr>
<td>travleyalla</td>
<td>3</td>
</tr>
<tr>
<td>Wego</td>
<td>2</td>
</tr>
<tr>
<td>Sky scanner</td>
<td>2</td>
</tr>
<tr>
<td>Gulf air</td>
<td>2</td>
</tr>
<tr>
<td>Travco</td>
<td>2</td>
</tr>
<tr>
<td>Al Tayyar</td>
<td>2</td>
</tr>
<tr>
<td>Thomas Cook</td>
<td>2</td>
</tr>
</tbody>
</table>

Sources of travel info

<table>
<thead>
<tr>
<th>Source of travel info</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I read online reviews to keep up-to-date with the latest offers</td>
<td>34</td>
</tr>
<tr>
<td>I noticed and reflected on advertising in print magazines</td>
<td>12</td>
</tr>
<tr>
<td>I noticed and reflected on advertising on the internet</td>
<td>26</td>
</tr>
<tr>
<td>I went to travel websites to browse</td>
<td>55</td>
</tr>
<tr>
<td>I went into a travel agency to see what’s new</td>
<td>25</td>
</tr>
<tr>
<td>I spoke with friends/family/colleagues about travel</td>
<td>47</td>
</tr>
<tr>
<td>I followed travel vloggers/bloggers</td>
<td>23</td>
</tr>
<tr>
<td>I watched travel TV programmes</td>
<td>18</td>
</tr>
<tr>
<td>I signed up for email newsletters</td>
<td>15</td>
</tr>
<tr>
<td>I followed travel providers on social media</td>
<td>35</td>
</tr>
<tr>
<td>I read travel print magazines</td>
<td>10</td>
</tr>
<tr>
<td>I looked for travel ads by tour operators/travel agents</td>
<td>38</td>
</tr>
<tr>
<td>None of the above</td>
<td>11</td>
</tr>
</tbody>
</table>
Leisure Travel... How?

Search

Book

Pay

- Online
- Offline

- Online
- Offline

- Bank transfer
- Cash
- Credit card
- Debit card
- Other

97
31
69
60
8
4
4
24

3
69
8
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

- Wanted to talk to a travel agent in-person: 46
- More information was available in agent's office: 37
- More convenient to go into a travel agent: 36
- Was able to find a good package: 31
- Friend/family member recommended an agent: 30
- Flexibility in managing bookings: 29
- Went to favourite agent: 28
- It was cheaper: 26
- Don’t trust online payments: 25
- Easier to reach a decision in agent’s office: 22
- Pricing structure was not clear / hidden charges: 20
- Advertisement for the agent: 18
- Free travel insurance: 18
- Popped in randomly: 14

Multiple Answers
# Online Search Points

## Process

- Compared flight prices: 55
- Compared accommodation rates: 53
- Explored activities available at destination: 52
- Searched for discounts: 45
- Visited travel providers’ websites to learn more about specific products: 43
- Read reviews by customers: 42
- Searched for available packages: 38
- Read reviews by travel experts: 38
- Watched videos: 35
- Reviewed general consumer advice/recommendations: 29
- Reviewed forums/social networking sites: 25
- Followed links in e-mails/e-newsletters from travel providers: 19
- Clicked on a banner ad: 12

## Top websites

<table>
<thead>
<tr>
<th>Website</th>
<th>Multiple Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trivago</td>
<td>41</td>
</tr>
<tr>
<td>Booking.com</td>
<td>35</td>
</tr>
<tr>
<td>Emirates Airlines</td>
<td>31</td>
</tr>
<tr>
<td>Trip Advisor</td>
<td>22</td>
</tr>
<tr>
<td>Emirates Holidays</td>
<td>22</td>
</tr>
<tr>
<td>Skyscanner</td>
<td>21</td>
</tr>
<tr>
<td>Musafir</td>
<td>18</td>
</tr>
<tr>
<td>Expedia</td>
<td>18</td>
</tr>
<tr>
<td>Al Tayyar</td>
<td>17</td>
</tr>
<tr>
<td>Rehlat</td>
<td>17</td>
</tr>
<tr>
<td>Saudi Holidays</td>
<td>17</td>
</tr>
<tr>
<td>Hotels.com</td>
<td>16</td>
</tr>
<tr>
<td>Wego</td>
<td>16</td>
</tr>
<tr>
<td>Hoojoozat</td>
<td>16</td>
</tr>
<tr>
<td>AirBnB</td>
<td>16</td>
</tr>
<tr>
<td>Yamsafer</td>
<td>13</td>
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<tr>
<td>gomosafer</td>
<td>13</td>
</tr>
<tr>
<td>Almosafer</td>
<td>13</td>
</tr>
<tr>
<td>Travelsheikh</td>
<td>12</td>
</tr>
<tr>
<td>Holidayme.com</td>
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</tr>
<tr>
<td>Flyin</td>
<td>11</td>
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<tr>
<td>Tajawal</td>
<td>11</td>
</tr>
<tr>
<td>Agoda</td>
<td>10</td>
</tr>
<tr>
<td>Kayak.com</td>
<td>10</td>
</tr>
<tr>
<td>MakeMyTrip</td>
<td>8</td>
</tr>
<tr>
<td>Holiday Factory</td>
<td>7</td>
</tr>
<tr>
<td>Etihad Holidays</td>
<td>7</td>
</tr>
<tr>
<td>Hotelscombined</td>
<td>7</td>
</tr>
<tr>
<td>Cleartrip</td>
<td>5</td>
</tr>
</tbody>
</table>

Multiple Answers: 127
Offline Search Points

**Process**

- Asked for opinions and recommendations from friends, relatives, colleagues: 60
- Visited a travel agency to compare products and prices: 43
- Visited a travel agency to research packages: 32
- Read about travel products in catalogues, flyers or postcards: 32
- Visited a travel agency spontaneously, without a specific goal in mind: 27
- Read articles about travel products in a magazine: 26

**Top Agents**

- Misr Holidays: 52
- Travco: 44
- Thomas Cook: 28
- AMEX Travel: 21
- Kanoo Travel: 13
- Astra Travel: 13
- Air Arabia airlines: 0.4
- Booking.com: 0.4
- Egyptair: 0.4
- flydubai: 0.4
- Royal Palace: 0.4
- Remas tours: 0.4
- Travco: 0.4
- Tre Joli Tours: 0.4

Multiple Answers
Decision Process: Who Decides?

- **Female**
  - Me only: 36%
  - Me, with help from others: 56%

- **Male**
  - Me only: 64%
  - Me, with help from others: 47%
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
General Considerations

Decision cycle
- Budget
- Destination
- Accommodation
- Itinerary
- Brand to book
- Activities
- Duration
- Where to book
- Flight

Device used for search
- Smartphone: 85
- Laptop: 77
- Desktop: 44
- Tablet: 26
- Phablet: 10

Multiple Answers
## Destination Evaluation

### Accommodation
- **Accommodation cost**: 60
- **Hotel location (city, resort, distance)**: 54
- **Hotel classification (5 star, 4 star etc.)**: 50
- **Hotel rating (customer feedback, reviews)**: 43
- **Hotel’s policy on social responsibility / eco-friendly**: 17

### Transportation
- **Cost of the flight tickets**: 50
- **Airline reputation (safety, services)**: 42
- **Itinerary (stop overs, waiting times, duration)**: 34
- **Other transportation costs (taxi, Uber, car rental)**: 28
- **Airline reviews (customer feedback)**: 23

*Multiple Answers*
Activities Considerations

- **Availability of halal, vegetarian or vegan food**: 41
- **Cost of activities**: 34
- **Activities (what to do)**: 33
- **Availability of family friendly activities/places**: 32
- **Sightseeing**: 67
- **Shopping**: 62
- **Hajj & Umrah**: 54
- **Relaxation and pampering**: 44
- **Excursions / cruises**: 38
- **Cultural events**: 38
- **Trying different foods and cuisines / restaurants**: 36
- **Entertainment**: 33
- **VFF**: 33
- **Doing or attending sports**: 28
- **Attending concerts / plays**: 26
- **Work**: 23
- **Social events**: 18
- **Health and medical**: 15
Search Cycle vs. Time Spent

<table>
<thead>
<tr>
<th>Destination</th>
<th>Activities</th>
<th>Transportation/flight</th>
<th>Accommodation</th>
<th>Duration</th>
<th>Accommodation cost</th>
<th>Transportation cost</th>
<th>Activities cost</th>
<th>Shortlisting options</th>
<th>Package search</th>
<th>Wait for the deal to materialize</th>
<th>Make the actual booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total search</td>
<td>I came to a conclusion very quickly</td>
<td>I spent a considerable amount of time</td>
<td>I spent some time on this</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>48</td>
<td>57</td>
<td>50</td>
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<td>50</td>
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<td>57</td>
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<td>43</td>
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<td>34</td>
<td>60</td>
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<td>9</td>
<td>18</td>
<td>33</td>
<td>14</td>
<td>17</td>
<td>37</td>
</tr>
</tbody>
</table>
Change of mind
(during the process of search)

- Accommodation: 75
- Activities: 74
- Accommodation cost: 72
- Activities cost: 70
- Transportation cost: 69
- Duration: 66
- Itinerary: 64
- Destination: 51

Multiple Answers

Trigger for making the booking

- Enough information to make a decision: 46
- Finances became available: 25
- Found a package: 9
- Worried prices might go up: 8
- Compelling advert: 4

Multiple Answers
Actual Booking

### Element booked

<table>
<thead>
<tr>
<th>Element</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>64</td>
</tr>
<tr>
<td>Accommodation</td>
<td>61</td>
</tr>
<tr>
<td>Transportation</td>
<td>28</td>
</tr>
<tr>
<td>Activities</td>
<td>22</td>
</tr>
<tr>
<td>A package combining flights and accommodation</td>
<td>8</td>
</tr>
<tr>
<td>A package combining flights, accommodation and activities</td>
<td>13</td>
</tr>
</tbody>
</table>

### Payment method

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Flights</th>
<th>Accommodation</th>
<th>Transportation</th>
<th>Activities</th>
<th>Package</th>
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</thead>
<tbody>
<tr>
<td>Bank transfer</td>
<td>1</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Cash</td>
<td>6</td>
<td>8</td>
<td>11</td>
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</tr>
<tr>
<td>Credit card</td>
<td>6</td>
<td>4</td>
<td>19</td>
<td>33</td>
<td>19</td>
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<tr>
<td>Debit card</td>
<td>30</td>
<td>29</td>
<td>19</td>
<td>33</td>
<td>47</td>
</tr>
<tr>
<td>Other</td>
<td>60</td>
<td>56</td>
<td>65</td>
<td>59</td>
<td>44</td>
</tr>
</tbody>
</table>

- Multiple Answers
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

- It was more convenient (regardless of the price) 55
- It included more than what I wanted (i.e. encouraged me to do certain activities) 71
- The price was encouraging 44

... not to Package

- It was not convenient (timing, duration, hotel location) 54
- It included more than what I wanted (i.e. was not interested in some activities) 57
- The price was not encouraging 31

Multiple Answers
## Package Components

### Components

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>96</td>
</tr>
<tr>
<td>Accommodation</td>
<td>96</td>
</tr>
<tr>
<td>Meal plan</td>
<td>73</td>
</tr>
<tr>
<td>Airport transfers</td>
<td>71</td>
</tr>
<tr>
<td>Activities</td>
<td>64</td>
</tr>
<tr>
<td>Transportation during the holiday</td>
<td>60</td>
</tr>
</tbody>
</table>

### Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>67</td>
</tr>
<tr>
<td>Shopping</td>
<td>62</td>
</tr>
<tr>
<td>Hajj &amp; Umrah</td>
<td>54</td>
</tr>
<tr>
<td>Relaxation and pampering</td>
<td>44</td>
</tr>
<tr>
<td>Excursions / cruises</td>
<td>38</td>
</tr>
<tr>
<td>Cultural events</td>
<td>38</td>
</tr>
<tr>
<td>Trying different foods and cuisines / restaurants</td>
<td>36</td>
</tr>
<tr>
<td>Entertainment</td>
<td>33</td>
</tr>
<tr>
<td>Doing or attending sports</td>
<td>28</td>
</tr>
<tr>
<td>Attending concerts / plays</td>
<td>26</td>
</tr>
<tr>
<td>Social events</td>
<td>18</td>
</tr>
</tbody>
</table>
Post-Booking

Amount Spent

- No budget in mind: 61
- More than budget: 3
- On budget: 5
- Less than budget: 32

General Satisfaction with the leisure booking

- Very satisfied: 34
- Satisfied: 51
- Neutral: 2
- Dissatisfied: 13
- Very dissatisfied: 2
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
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**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>24</td>
</tr>
<tr>
<td>Twice</td>
<td>26</td>
</tr>
<tr>
<td>3 times</td>
<td>23</td>
</tr>
<tr>
<td>4 times</td>
<td>14</td>
</tr>
<tr>
<td>5 times</td>
<td>4</td>
</tr>
<tr>
<td>more than 5 times</td>
<td>9</td>
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</tbody>
</table>

**Duration**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
<td>Day trips – no overnight stay</td>
<td>2</td>
</tr>
<tr>
<td>1 night stay</td>
<td>2</td>
</tr>
<tr>
<td>2 night stay</td>
<td>16</td>
</tr>
<tr>
<td>3 night stay</td>
<td>24</td>
</tr>
<tr>
<td>4 night stay</td>
<td>19</td>
</tr>
<tr>
<td>One week stay</td>
<td>19</td>
</tr>
<tr>
<td>More than a week's stay</td>
<td>18</td>
</tr>
</tbody>
</table>
Business Travel... Who?

Search

- The company: 69%
- Myself: 5%
- Travel Agent: 26%

Book

- The company: 58%
- Myself: 11%
- Travel Agent: 31%

Pay

- The company: 63%
- Myself: 38%
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

- Male: 53
- Female: 47

Age

- 31-40 yo: 41
- 41-50 yo: 35
- 51-60 yo: 7

Marital Status

- Married with children: 14
- Married without children: 12
- Single with children: 21
- Single without children: 30

HH Monthly Income

- 1,501 - 2,000 USD: 19
- 2,001 - 3,000 USD: 19
- 3,001 - 4,000 USD: 20
- 4,001 - 6,000 USD: 11
- 6,001 - 8,000 USD: 12
- More than 8,000 USD: 19

Household size

- One: 7
- Two: 11
- Three: 22
- Four: 27
- Five or more: 33

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

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

**Frequency**
- Once: 21
- Twice: 25
- 3 Times: 15
- 4 Times: 12
- 5 Times or more: 27

**Destination**
- Domestic: 19
- Regional: 43
- Home country & VFF: 26
- International: 83

**Companionship**
- Family: 62
- Solo: 16
- Friends: 13
- Equally: 9

**Multiple Answers**
- Europe: 29
- Asia: 25
- America: 8
- Africa: 6
- Other: 4
Mindset When Booking Travel

### Motive for travelling

<table>
<thead>
<tr>
<th>Motive</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>I like travelling</td>
<td>30%</td>
</tr>
<tr>
<td>To treat myself</td>
<td>14%</td>
</tr>
<tr>
<td>To discover the world</td>
<td>12%</td>
</tr>
<tr>
<td>To treat my family</td>
<td>10%</td>
</tr>
<tr>
<td>Visiting friends &amp; family</td>
<td>8%</td>
</tr>
<tr>
<td>To make a change in my lifestyle</td>
<td>8%</td>
</tr>
<tr>
<td>It’s the time of the year when everyone...</td>
<td>5%</td>
</tr>
<tr>
<td>Prompted by a change in life</td>
<td>3%</td>
</tr>
<tr>
<td>Persuaded by a friend/colleague</td>
<td>3%</td>
</tr>
<tr>
<td>To make the most of a great promotion</td>
<td>3%</td>
</tr>
<tr>
<td>Business meetings or work</td>
<td>2%</td>
</tr>
<tr>
<td>To follow social expectations</td>
<td>1%</td>
</tr>
<tr>
<td>There’s nothing to do at home</td>
<td>1%</td>
</tr>
<tr>
<td>Regular health check-ups / treatments</td>
<td>1%</td>
</tr>
<tr>
<td>Study, training, courses</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Tech savviness

<table>
<thead>
<tr>
<th>Tech savviness</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - New technology tends to make me feel anxious</td>
<td>2%</td>
</tr>
<tr>
<td>2</td>
<td>4%</td>
</tr>
<tr>
<td>3</td>
<td>18%</td>
</tr>
<tr>
<td>4</td>
<td>26%</td>
</tr>
<tr>
<td>5 - I generally feel empowered by technology</td>
<td>50%</td>
</tr>
</tbody>
</table>
Mindset When Booking Travel

**Exploration**

- I like to explore different options and I take my time researching for the best options for choice and price: 53%
- I tend to do a quick search, and I use help from travel agent, flight & hotel comparison sites: 20%
- I know exactly what I want, and I focus on making the booking as quickly as possible: 27%

**Pre-Determination**

- Accommodation: 52%
- Destination: 52%
- Budget: 51%
- Duration: 46%
- Activities: 43%
- Flight: 40%
- None: 1%

**Open** 53%, **Committed** 47%
Travel Patterns by Frequency

- **Once a year**: 21 times, with 65% domestic, 19% regional, 28% home country, and 2% international.
- **Twice a year**: 25 times, with 49% domestic, 24% regional, 19% home country, and 8% international.
- **Three times a year**: 15 times, with 42% domestic, 24% regional, 18% home country, and 16% international.
- **Four times a year**: 12 times, with 37% domestic, 22% regional, 20% home country, and 21% international.
- **Five times a year or more**: 27 times, with 35% domestic, 21% regional, 25% home country, and 19% international.

*Base: Frequency*
Travel Patterns by Destination

Domestically
- Once: 3
- Twice: 16
- 3 Times: 19
- 4 Times: 21
- 5 Times or more: 41

Regionally
- Once: 25
- Twice: 25
- 3 Times: 11
- 4 Times: 11
- 5 Times or more: 28

Home Country
- Once: 20
- Twice: 16
- 3 Times: 19
- 4 Times: 19
- 5 Times or more: 32

Internationally
- Once: 30
- Twice: 30
- 3 Times: 13
- 4 Times: 13
- 5 Times or more: 21

Multiple Answers

Base: Destination
By Origin

Frequency

Destination

GCC Arab Expats

- Once a year: 29
- Twice a year: 24
- Three times a year: 14
- Four times a year: 12
- Five times a year or more: 11

GCC Indian Sub-Cont. Expats

- Once a year: 28
- Twice a year: 17
- Three times a year: 18
- Four times a year: 14
- Five times a year or more: 12

GCC Nationals

- Once a year: 23
- Twice a year: 20
- Three times a year: 12
- Four times a year: 11
- Five times a year or more: 8

GCC Western & Other Expats

- Once a year: 28
- Twice a year: 25
- Three times a year: 17
- Four times a year: 15
- Five times a year or more: 15

Multiple Answers

- Domestic: 15
- Regional: 40
- Home Country: 40
- International: 74

- Domestic: 18
- Regional: 24
- Home Country: 51
- International: 62

- Domestic: 17
- Regional: 40
- Home Country: 40
- International: 74

- Domestic: 15
- Regional: 27
- Home Country: 44
- International: 68
Domestic Travel

**Reasons**

- It’s more convenient for short breaks
- I get to travel more for the same budget
- There are many domestic leisure destinations to explore
- I don’t get long enough holidays to go abroad more often
- It’s difficult to get visas
- I don’t like flying
- Many destinations don’t have halal food
- Many destinations don’t speak my language

**Duration**

1 night stay
- GCC Nationals: 4
- GCC Arab Expats: 9
- GCC Indian Sub-Cont. Expats: 20
- GCC Western & Other Expats: 27

2 nights stay
- GCC Nationals: 14
- GCC Arab Expats: 20
- GCC Indian Sub-Cont. Expats: 27
- GCC Western & Other Expats: 36

3 nights stay
- GCC Nationals: 14
- GCC Arab Expats: 27
- GCC Indian Sub-Cont. Expats: 36
- GCC Western & Other Expats: 40

4 nights stay
- GCC Nationals: 9
- GCC Arab Expats: 20
- GCC Indian Sub-Cont. Expats: 29
- GCC Western & Other Expats: 40

a week’s stay
- GCC Nationals: 8
- GCC Arab Expats: 18
- GCC Indian Sub-Cont. Expats: 20
- GCC Western & Other Expats: 43

more than a week’s stay
- GCC Nationals: 14
- GCC Arab Expats: 27
- GCC Indian Sub-Cont. Expats: 20
- GCC Western & Other Expats: 40

Day trips – no overnight stay
- GCC Nationals: 9
- GCC Arab Expats: 20

**Payment**

- Online: 72
- Offline: 82
- On arrival: 43
- Other: 40

**Multiple Answers**

- GCC Nationals: 75
- GCC Arab Expats: 75
- GCC Indian Sub-Cont. Expats: 75
- GCC Western & Other Expats: 75
Awareness

Sources of travel info

- I read online reviews to keep up-to-date with the latest offers
- I noticed and reflected on advertising in print magazines
- I noticed and reflected on advertising on the internet
- I went to travel websites to browse
- I went into a travel agency to see what's new
- I spoke with friends/family/colleagues about travel
- I followed travel vloggers/bloggers
- I watched travel TV programmes
- I signed up for email newsletters
- I followed travel providers on social media (e.g. Airlines, Hotels on Twitter, …)
- I read travel print magazines
- I looked for travel ads by tour operators/travel agents (online or offline)
- None of the above

Active

PASSIVE 35

ACTIVE 65
## Top-of-Mind Awareness

### GCC Nationals

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Online Search Points

- Compared flight prices online: 32% GCC Nationals, 49% GCC Arab Expats, 47% GCC Indian Sub-Cont. Expats, 47% GCC Western & Other Expats
- Compared accommodation prices online: 32% GCC Nationals, 47% GCC Arab Expats, 47% GCC Indian Sub-Cont. Expats, 47% GCC Western & Other Expats
- Checked online for activities to do at destination: 31% GCC Nationals, 40% GCC Arab Expats, 44% GCC Indian Sub-Cont. Expats, 47% GCC Western & Other Expats
- Searched for discounts online: 29% GCC Nationals, 34% GCC Arab Expats, 40% GCC Indian Sub-Cont. Expats, 44% GCC Western & Other Expats
- Visited travel providers' websites: 28% GCC Nationals, 33% GCC Arab Expats, 33% GCC Indian Sub-Cont. Expats, 33% GCC Western & Other Expats
- Used forums/social networking sites: 26% GCC Nationals, 33% GCC Arab Expats, 33% GCC Indian Sub-Cont. Expats, 33% GCC Western & Other Expats
- Searched for packages online: 25% GCC Nationals, 33% GCC Arab Expats, 33% GCC Indian Sub-Cont. Expats, 33% GCC Western & Other Expats
- Read sources such as general consumer advice: 23% GCC Nationals, 33% GCC Arab Expats, 37% GCC Indian Sub-Cont. Expats, 38% GCC Western & Other Expats
- Watched videos: 23% GCC Nationals, 25% GCC Arab Expats, 27% GCC Indian Sub-Cont. Expats, 37% GCC Western & Other Expats
- Read online reviews by customers: 22% GCC Nationals, 28% GCC Arab Expats, 28% GCC Indian Sub-Cont. Expats, 36% GCC Western & Other Expats
- Read online reviews by travel experts: 21% GCC Nationals, 25% GCC Arab Expats, 25% GCC Indian Sub-Cont. Expats, 36% GCC Western & Other Expats
- Followed up on links in emails from travel providers: 16% GCC Nationals, 15% GCC Arab Expats, 15% GCC Indian Sub-Cont. Expats, 15% GCC Western & Other Expats
- Clicked on a banner ad: 9% GCC Nationals, 11% GCC Arab Expats, 15% GCC Indian Sub-Cont. Expats, 15% GCC Western & Other Expats

Multiple Answers
Top Websites Used for Booking

### GCC Nationals

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### GCC Arab Expats

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Offline Search Points

- Asked for opinions and recommendations from friends, relatives, colleagues: 49% GCC Nationals, 46% GCC Arab Expats, 44% GCC Indian Sub-Cont. Expats, 44% GCC Western & Other Expats
- Went to a travel agency to compare products and prices: 57% GCC Nationals, 53% GCC Arab Expats, 46% GCC Indian Sub-Cont. Expats, 44% GCC Western & Other Expats
- Went to a travel agency to look for packages: 31% GCC Nationals, 31% GCC Arab Expats, 28% GCC Indian Sub-Cont. Expats, 26% GCC Western & Other Expats
- Went to a travel agency spontaneously, without a specific goal in mind: 25% GCC Nationals, 25% GCC Arab Expats, 20% GCC Indian Sub-Cont. Expats, 23% GCC Western & Other Expats
- Read about travel products in catalogues, flyers or postcards: 30% GCC Nationals, 29% GCC Arab Expats, 23% GCC Indian Sub-Cont. Expats, 25% GCC Western & Other Expats
- Read articles about travel products in a magazine: 25% GCC Nationals, 25% GCC Arab Expats, 22% GCC Indian Sub-Cont. Expats, 22% GCC Western & Other Expats
# Top Travel Agents Used for Booking

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<th>GCC Nationals</th>
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<th>GCC Western &amp; Other Expats</th>
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<td>Regency Holidays</td>
<td>Omeir Travel</td>
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<td>Snata</td>
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<td>Al Rostomani Travel</td>
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<tr>
<td>Travco</td>
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<td>Omeir Travel</td>
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<td>Meson Travel</td>
<td>Al Tayyar Travel Group</td>
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<tr>
<td>Ethihad Holidays</td>
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<tr>
<td>Al Futtaim</td>
<td>Darwish Holidays</td>
<td>Mannai Travel</td>
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<td>Fursan Travel</td>
<td>AFC Holidays</td>
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<tr>
<td>Mannai Travel</td>
<td>Rida International…</td>
<td>Kurban Travel</td>
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</tr>
<tr>
<td>Orient Travel</td>
<td>Bahwan Travel</td>
<td></td>
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</tr>
</tbody>
</table>

**GCC Nationals:**
- Kanoo Travel: 21
- Fursan Travel: 20
- AMEX Travel: 19
- Al Tayyar Travel Group: 18
- Thomas Cook: 5
- Bahwan Travel: 5
- Qatar Airways Holidays: 4
- Regency Holidays: 3
- Cozmo Travel: 3
- Emirates Holidays: 3
- Dnata Travel: 3
- Travco: 2
- Meson Travel: 2
- Ethihad Holidays: 1
- Omeir Travel: 1
- Al Futtaim: 1
- Darwish Holidays: 1
- Mannai Travel: 1
- Orient Travel: 1
- Al Motaheda: 1

**GCC Arab Expats:**
- Dnata Travel: 18
- Emirates Holidays: 17
- Ethihad Holidays: 13
- Regency Holidays: 10
- Kanoo Travel: 7
- Al Futtaim: 6
- Cozmo Travel: 6
- Omeir Travel: 6
- Thomas Cook: 5
- Qatar Airways Holidays: 5
- Travco: 5
- Snata: 4
- Al Rostomani Travel: 4
- Al Tayyar Travel Group: 3
- Orient Travel: 3
- AMEX Travel: 3
- Darwish Holidays: 2
- Fursan Travel: 2
- Rida International…: 2
- Bahwan Travel: 2

**GCC Indian Sub-Cont. Expats:**
- Dnata Travel: 22
- Emirates Holidays: 20
- Thomas Cook: 14
- Kanoo Travel: 11
- Ethihad Holidays: 11
- Qatar Airways Holidays: 9
- Orient Travel: 8
- AMEX Travel: 8
- Al Rostomani Travel: 7
- Snata: 6
- Al Futtaim: 6
- Farsan Travel: 5
- Omeir Travel: 5
- Cozmo Travel: 5
- Global Holidays: 4
- Travco: 3
- Regency Holidays: 3
- Mannai Travel: 2
- AFC Holidays: 2
- Kurban Travel: 2

**GCC Western & Other Expats:**
- Dnata Travel: 26
- Emirates Holidays: 20
- Etihad Holidays: 17
- Kanoo Travel: 15
- AMEX Travel: 11
- Al Rostomani Travel: 10
- Al Tayyar Travel Group: 9
- Fursan Travel: 8
- Omeir Travel: 7
- Al Futtaim: 6
- Qatar Airways Holidays: 6
- Thomas Cook: 4
- Global Holidays: 4
- Orient Travel: 3
- Acon Travel: 3
- Clear trip: 1
- Clopetera Travel: 1
- Darwish Holidays: 1
- Holiday Factory: 1
Decision Process: Who Decides?

- Female:
  - Me only: 26
  - Me, with help from others: 46
- Male:
  - Me only: 45
  - Me, with help from others: 55

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

- **Destination**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Budget**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Accommodation**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Duration**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Activities**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Flight**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Where to book**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Brand to book**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)
- **Itinerary**: 1 (GCC Nationals), 2 (GCC Arab Expats), 3 (GCC Indian Sub-Cont. Expats), 4 (GCC Western & Other Expats)

### Device used for search

- **Smartphone**: 73 (GCC Nationals), 81 (GCC Arab Expats), 65 (GCC Indian Sub-Cont. Expats), 63 (GCC Western & Other Expats)
- **Laptop**: 57 (GCC Nationals), 55 (GCC Arab Expats), 65 (GCC Indian Sub-Cont. Expats), 63 (GCC Western & Other Expats)
- **Desktop**: 24 (GCC Nationals), 28 (GCC Arab Expats), 29 (GCC Indian Sub-Cont. Expats), 37 (GCC Western & Other Expats)
- **Tablet**: 13 (GCC Nationals), 19 (GCC Arab Expats), 13 (GCC Indian Sub-Cont. Expats), 26 (GCC Western & Other Expats)
- **Phablet**: 5 (GCC Nationals), 3 (GCC Arab Expats), 10 (GCC Indian Sub-Cont. Expats), 10 (GCC Western & Other Expats)

Multiple Answers
Destination Evaluation

Accommodation

- Hotel classification (5 star, 4 star etc.): 32% GCC Nationals, 41% GCC Arab Expats, 26% GCC Indian Sub-Cont. Expats, 34% GCC Western & Other Expats
- Hotel location (city, resort, distance): 27% GCC Nationals, 41% GCC Arab Expats, 27% GCC Indian Sub-Cont. Expats, 37% GCC Western & Other Expats
- Hotel rating (customer feedback, reviews): 25% GCC Nationals, 33% GCC Arab Expats, 24% GCC Indian Sub-Cont. Expats, 27% GCC Western & Other Expats
- Accommodation cost: 35% GCC Nationals, 57% GCC Arab Expats, 50% GCC Indian Sub-Cont. Expats, 45% GCC Western & Other Expats
- Hotel’s policy on social responsibility / eco-friendly: 10% GCC Nationals, 13% GCC Arab Expats, 11% GCC Indian Sub-Cont. Expats, 13% GCC Western & Other Expats

Transportation

- Cost of the flight tickets: 34% GCC Nationals, 55% GCC Arab Expats, 44% GCC Indian Sub-Cont. Expats, 57% GCC Western & Other Expats
- Airline reputation (safety, services): 27% GCC Nationals, 28% GCC Arab Expats, 26% GCC Indian Sub-Cont. Expats, 28% GCC Western & Other Expats
- Itinerary (stop overs, waiting times, duration): 23% GCC Nationals, 25% GCC Arab Expats, 29% GCC Indian Sub-Cont. Expats, 45% GCC Western & Other Expats
- Other transportation costs (taxi, Uber, car rental): 21% GCC Nationals, 26% GCC Arab Expats, 21% GCC Indian Sub-Cont. Expats, 17% GCC Western & Other Expats
- Airline reviews (customer feedback): 16% GCC Nationals, 13% GCC Arab Expats, 16% GCC Indian Sub-Cont. Expats, 13% GCC Western & Other Expats

Multiple Answers

- GCC Nationals
- GCC Arab Expats
- GCC Indian Sub-Cont. Expats
- GCC Western & Other Expats
Activities Considerations

Availability of halal, vegetarian or vegan food
- GCC Nationals: 28
- GCC Arab Expats: 31
- GCC Indian Sub-Cont. Expats: 26
- GCC Western & Other Expats: 6

Activities (what to do)
- GCC Nationals: 25
- GCC Arab Expats: 31
- GCC Indian Sub-Cont. Expats: 33
- GCC Western & Other Expats: 51

Availability of family friendly activities/places
- GCC Nationals: 23
- GCC Arab Expats: 26
- GCC Indian Sub-Cont. Expats: 23
- GCC Western & Other Expats: 31

Cost of activities
- GCC Nationals: 21
- GCC Arab Expats: 40
- GCC Indian Sub-Cont. Expats: 45
- GCC Western & Other Expats: 50

Multiple Answers
### Search Cycle vs. Time Spent (GCC Nationals)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Activities</th>
<th>Transportation/Flight</th>
<th>Accommodation</th>
<th>Duration</th>
<th>Accommodation cost</th>
<th>Transportation cost</th>
<th>Activities cost</th>
<th>Shortlisting options</th>
<th>Package search</th>
<th>Wait for the deal to materialize</th>
<th>Make the actual booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
<td>53</td>
<td>49</td>
<td>45</td>
<td>51</td>
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<td>53</td>
<td>38</td>
<td>34</td>
<td>51</td>
<td>42</td>
</tr>
</tbody>
</table>

**Total search**

**I came to a conclusion very quickly**

**I spent a considerable amount of time**

**I spent some time on this**

---

I came to a conclusion very quickly

I spent a considerable amount of time

I spent some time on this
# Search Cycle vs. Time Spent (GCC Arab Expats)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Activities</th>
<th>Transportation/flight</th>
<th>Accommodation</th>
<th>Duration</th>
<th>Accommodation cost</th>
<th>Transportation cost</th>
<th>Activities cost</th>
<th>Shortlisting options</th>
<th>Package search</th>
<th>Wait for the deal to materialize</th>
<th>Make the actual booking</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

- **Total search**: 47, 57, 49, 57, 38, 55, 54, 62, 59, 60, 42, 49
- **I came to a conclusion very quickly**: 5, 11, 8, 11, 5, 10, 9, 8, 16, 13, 24, 5
- **I spent a considerable amount of time**: 48, 31, 43, 32, 57, 35, 37, 31, 26, 27, 35, 46
- **I spent some time on this**: 42, 49, 49, 49, 49, 49, 49, 49, 49, 49, 49, 49

I came to a conclusion very quickly
I spent a considerable amount of time
I spent some time on this

---

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

- Destination
- Activities
- Transportation/flight
- Accommodation
- Duration
- Accommodation cost
- Transportation cost
- Activities cost
- Shortlisting options
- Package search
- Wait for the deal to materialize
- Make the actual booking

- Total search
- I came to a conclusion very quickly
- I spent a considerable amount of time
- I spent some time on this

- % of Total

- 46
- 51
- 35
- 28
- 61
- 20
- 51
- 47
- 50
- 48
- 43
- 45
- 45

- 17
- 13
- 22
- 24
- 52
- 27
- 21
- 31
- 38
- 45
- 27
- 19
- 36

179
Reconsideration vs. Commitment

Change of mind
(during the process of search)

<table>
<thead>
<tr>
<th>Category</th>
<th>GCC Nationals</th>
<th>GCC Arab Expats</th>
<th>GCC Indian Sub-Cont. Expats</th>
<th>GCC Western &amp; Other Expats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
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<tr>
<td>Accommodation</td>
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<td>62</td>
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</tr>
<tr>
<td>Transportation cost</td>
<td>49</td>
<td>57</td>
<td>67</td>
<td></td>
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<tr>
<td>Duration</td>
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</tr>
<tr>
<td>Accommodation cost</td>
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</tr>
<tr>
<td>Activities cost</td>
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<tr>
<td>Itinerary</td>
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<td></td>
</tr>
<tr>
<td>Destination</td>
<td>40</td>
<td>51</td>
<td>59</td>
<td></td>
</tr>
</tbody>
</table>

Trigger for making the booking

- Enough information to make a decision: 41%
- Found a package: 29%
- Found an offer: 16%
- Worried prices might go up: 11%
- Finances became available: 7%
- Compelling advert: 3%

Multiple Answers
Leisure Travel... How?

Search

- Bank transfer: 93
- Cash: 7
- Credit card: 7
- Debit card: 24
- Other: 1

Book

- Bank transfer: 76
- Cash: 11
- Credit card: 11
- Debit card: 5
- Other: 5

Pay

- Bank transfer: 78
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

<table>
<thead>
<tr>
<th>Element</th>
<th>Flights</th>
<th>Accommodation</th>
<th>Transportation</th>
<th>Activities</th>
<th>A package combining flights and accommodation</th>
<th>A package combining flights, accommodation and activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>54</td>
<td>51</td>
<td>29</td>
<td>18</td>
<td>8</td>
<td>12</td>
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<td>Accommodation</td>
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<td>55</td>
<td>24</td>
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<td>12</td>
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<tr>
<td>A package combining flights and accommodation</td>
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<td>22</td>
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<td>24</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>A package combining flights, accommodation and activities</td>
<td>18</td>
<td>12</td>
<td>16</td>
<td>17</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Searched online but booked offline

- Friend/family member recommended an agent
- Flexibility in managing bookings
- Wanted to talk to a travel agent in-person
- Was able to find a good package
- More convenient to go into a travel agent
- More information was available in agent’s office
- Went to favourite agent
- It was cheaper
- Easier to reach a decision in agent’s office
- Popped in randomly
- Don’t trust online payments
- Advertisement for the agent
- Free travel insurance
- Pricing structure was not clear / hidden charges

Multiple Answers
Payment Method for Booked Elements

<table>
<thead>
<tr>
<th>Category</th>
<th>GCC Nationals</th>
<th>GCC Arab Expats</th>
<th>GCC Indian Sub-Cont. Expats</th>
<th>GCC Western &amp; Other Expats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>5/6</td>
<td>0/10</td>
<td>1/8</td>
<td>2/9</td>
</tr>
<tr>
<td>Accommodation</td>
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<td>5/36</td>
<td>4/29</td>
<td>5/32</td>
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<td>Package</td>
<td>4/12</td>
<td>3/10</td>
<td>1/10</td>
<td>1/11</td>
</tr>
</tbody>
</table>

Bar graph showing payment method distribution for different categories and sub-categories.
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

- It was more convenient (regardless of the price)
  - GCC Nationals: 42
  - GCC Arab Expats: 29
  - GCC Ind/Sub-Cont. Expats: 37
  - GCC Western & Other Expats: 48

- It included more than what I wanted (i.e. encouraged me to do certain activities)
  - GCC Nationals: 34
  - GCC Arab Expats: 42
  - GCC Ind/Sub-Cont. Expats: 51
  - GCC Western & Other Expats: 52

- The price was encouraging
  - GCC Nationals: 63
  - GCC Arab Expats: 36
  - GCC Ind/Sub-Cont. Expats: 41
  - GCC Western & Other Expats: 41

... not to Package

- It was not convenient (timing, duration, hotel location)
  - GCC Nationals: 41
  - GCC Arab Expats: 37
  - GCC Ind/Sub-Cont. Expats: 35
  - GCC Western & Other Expats: 47

- It included more than what I wanted (i.e. was not interested in some activities)
  - GCC Nationals: 55
  - GCC Arab Expats: 40
  - GCC Ind/Sub-Cont. Expats: 41
  - GCC Western & Other Expats: 44

- The price was not encouraging
  - GCC Nationals: 39
  - GCC Arab Expats: 24
  - GCC Ind/Sub-Cont. Expats: 46
  - GCC Western & Other Expats: 53
## Package Components

### Components

<table>
<thead>
<tr>
<th>Component</th>
<th>Flights</th>
<th>Accommodation</th>
<th>Airport transfers</th>
<th>Transportation during the holiday</th>
<th>Activities</th>
<th>Meal plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>86</td>
<td>91</td>
<td>68</td>
<td>67</td>
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<td>50</td>
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<td>Accommodation</td>
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<td>67</td>
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<td>90</td>
<td>69</td>
<td>67</td>
<td>61</td>
<td>59</td>
</tr>
<tr>
<td>Transportation during the holiday</td>
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<td>94</td>
<td>68</td>
<td>67</td>
<td>61</td>
<td>59</td>
</tr>
</tbody>
</table>

### Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>GCC Nationals</th>
<th>GCC Arab Expats</th>
<th>GCC Indian Sub-Cont. Expats</th>
<th>GCC Western &amp; Other Expats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>44</td>
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<td>60</td>
<td>70</td>
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<tr>
<td>Relaxing and pampering</td>
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<td>60</td>
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<tr>
<td>Sightseeing</td>
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<td>28</td>
<td>67</td>
<td>67</td>
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<tr>
<td>Excursions / cruises</td>
<td>41</td>
<td>49</td>
<td>61</td>
<td>61</td>
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<tr>
<td>Cultural events</td>
<td>17</td>
<td>38</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Trying different foods and cuisines / restaurants</td>
<td>38</td>
<td>38</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>Entertainment</td>
<td>28</td>
<td>37</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Doing or attending sports</td>
<td>17</td>
<td>27</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>Attending concerts / plays</td>
<td>12</td>
<td>22</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>Hajj &amp; Umrah</td>
<td>10</td>
<td>12</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Social events</td>
<td>7</td>
<td>18</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Health and medical</td>
<td>2</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

*Multiple Answers*
Post-Booking

### Amount Spent

- **Didn't have a budget in mind**
  - GCC Nationals: 2
  - GCC Arab Expats: 2
  - GCC Indian Sub-Cont. Expats: 2
  - GCC Western & Other Expats: 2

- **More than planned**
  - GCC Nationals: 39
  - GCC Arab Expats: 36
  - GCC Indian Sub-Cont. Expats: 38
  - GCC Western & Other Expats: 33

- **Almost exactly what planned**
  - GCC Nationals: 54
  - GCC Arab Expats: 60
  - GCC Indian Sub-Cont. Expats: 58
  - GCC Western & Other Expats: 57

- **Less than what planned**
  - GCC Nationals: 5
  - GCC Arab Expats: 4
  - GCC Indian Sub-Cont. Expats: 2
  - GCC Western & Other Expats: 7

### General Satisfaction with the leisure booking

- **Very satisfied**
  - GCC Nationals: 41
  - GCC Arab Expats: 41
  - GCC Indian Sub-Cont. Expats: 51
  - GCC Western & Other Expats: 59

- **Satisfied**
  - GCC Nationals: 32
  - GCC Arab Expats: 50
  - GCC Indian Sub-Cont. Expats: 50
  - GCC Western & Other Expats: 59

- **Neutral**
  - GCC Nationals: 12
  - GCC Arab Expats: 13
  - GCC Indian Sub-Cont. Expats: 13
  - GCC Western & Other Expats: 11

- **Dissatisfied**
  - GCC Nationals: 1
  - GCC Arab Expats: 0
  - GCC Indian Sub-Cont. Expats: 0
  - GCC Western & Other Expats: 2

- **Very dissatisfied**
  - GCC Nationals: 2
  - GCC Arab Expats: 1
  - GCC Indian Sub-Cont. Expats: 1
  - GCC Western & Other Expats: 5
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
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

## Frequency

<table>
<thead>
<tr>
<th></th>
<th>GCC Nationals</th>
<th>GCC Arab Expats</th>
<th>GCC Indian Sub-Cont. Expats</th>
<th>GCC Western &amp; Other Expats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>17</td>
<td>34</td>
<td>24</td>
<td>17</td>
</tr>
<tr>
<td>Twice</td>
<td>27</td>
<td>39</td>
<td>30</td>
<td>27</td>
</tr>
<tr>
<td>3 times</td>
<td>25</td>
<td>36</td>
<td>17</td>
<td>25</td>
</tr>
<tr>
<td>4 times</td>
<td>5</td>
<td>6</td>
<td>12</td>
<td>15</td>
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<tr>
<td>5 times</td>
<td>2</td>
<td>8</td>
<td>12</td>
<td>2</td>
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<tr>
<td>more than 5 times</td>
<td>13</td>
<td>16</td>
<td>5</td>
<td>9</td>
</tr>
</tbody>
</table>

## Duration

<table>
<thead>
<tr>
<th>Stay Type</th>
<th>GCC Nationals</th>
<th>GCC Arab Expats</th>
<th>GCC Indian Sub-Cont. Expats</th>
<th>GCC Western &amp; Other Expats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day trips – no overnight stay</td>
<td>1</td>
<td>3</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1 night stay</td>
<td>6</td>
<td>5</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>2 night stay</td>
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<td>14</td>
<td>14</td>
<td>23</td>
</tr>
<tr>
<td>3 night stay</td>
<td>23</td>
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<td>4 night stay</td>
<td>24</td>
<td>24</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>One week stay</td>
<td>26</td>
<td>25</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>More than a week's stay</td>
<td>24</td>
<td>24</td>
<td>11</td>
<td>24</td>
</tr>
</tbody>
</table>
Business Travel… How?

**Search**
- Online: 76%
- Both: 12%
- Offline: 10%
- Don't know: 2%

**Book**
- Online: 64%
- Both: 16%
- Offline: 12%
- Don't know: 8%

**Pay**
- Online: 65%
- Both: 20%
- Offline: 11%
- Don't know: 3%

The charts show the distribution of preferences for online, offline, and both options for searching, booking, and paying for business travel.
Business Travel... Who?

### Search
- The company: 80%
- Myself: 66%
- Travel Agent: 7%

### Book
- The company: 64%
- Myself: 55%
- Travel Agent: 9%

### Pay
- The company: 71%
- Myself: 58%
- Travel Agent: 16%
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)
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.

Gender:
- Male: 59
- Female: 41

Age:
- 31-40 yo: 38
- 41-50 yo: 20
- 51-60 yo: 13
- 21-30 yo: 29

Marital Status:
- Married with children: 51
- Married without children: 13
- Single with children: 2
- Single without children: 2

HH Monthly Income:
- 1,501 - 2,000 USD: 6
- 2,001 - 3,000 USD: 11
- 3,001 - 4,000 USD: 13
- 4,001 - 6,000 USD: 27
- 6,001 - 8,000 USD: 20
- More than 8,000 USD: 22

Household size:
- One: 8
- Two: 15
- Three: 24
- Four: 25
- Five or more: 29
Travel

**Frequency**

- Once: 48
- Twice: 26
- 3 Times: 10
- 4 Times: 6
- 5 Times or more: 10

**Destination**

- Domestic: 6
- Regional: 38
- International: 70

**Multiple Answers**

- Europe: 36
- Asia: 17
- America: 6
- Africa: 8
- Other: 2

**Companionship**

- Solo: 22
- Friends: 16
- Friends Equally: 14
- Family: 49

**Lowest Frequency** with 26% only travelling 3 times + and mostly travel internationally 70%
Mindset When Booking Travel

Motive for travelling

- I like travelling: 40
- To make a change in my lifestyle: 17
- To discover the world: 17
- To treat myself: 9
- To treat my family: 6
- Business meetings or work: 3
- It’s the time of the year when everyone: 3
- Prompted by a change in life: 1
- Study, training, courses: 1
- To make the most of a great promotion: 1
- To follow social expectations: 1
- There’s nothing to do at home: 1
- Persuaded by a friend/colleague: 0
- Visiting friends & family: 0
- Regular health check-ups / treatments: 0

Tech savviness

- 1 - New technology tends to make me feel anxious: 17
- 2
- 3
- 4
- 5 - I generally feel empowered by technology: 30

47

3

3

17

30
Mindset When Booking Travel

**Exploration**

- I like to explore different options and I take my time researching for the best options for choice and price: 60
- I tend to do a quick search, and I use help from travel agent, flight & hotel comparison sites: 17
- I know exactly what I want, and I focus on making the booking as quickly as possible: 23

**Pre-Determination**

- Destination: 46
- Accommodation: 39
- Activities: 31
- Budget: 41
- Duration: 46
- Flight: 0
- None: 4

[Diagram showing distribution of choices: OPEN 60, COMMITTED 40]
Travel Patterns by Frequency

- **Once a year**: 42
- **Twice a year**: 27
- **Three times a year**: 11
- **Four times a year**: 8
- **Five time a year or more**: 11

Base: Frequency

- **Domestic**
  - Once a year: 1, Twice a year: 5, Three times a year: 11, Four times a year: 13, Five times a year or more: 10
  - Total: 60

- **Regional**
  - Once a year: 39, Twice a year: 29, Three times a year: 29, Four times a year: 37, Five times a year or more: 23
  - Total: 66

- **International**
  - Once a year: 61, Twice a year: 61, Three times a year: 61, Four times a year: 50, Five times a year or more: 68
  - Total: 68
Travel Patterns by Destination

Domestically:
- 6 times: 22
- 2 times: 28
- 3 times or more: 22

Regionally:
- 9 times: 24
- 3 times or more: 9

Internationally:
- 11 times: 29
- 4 times: 7
- 5 times or more: 12

Multiple Answers:
- Once: 6
- Twice: 28
- 3 Times: 22
- 4 Times: 22
- 5 Times or more: 22

Base: Destination
Awareness

Top-of-Mind

<table>
<thead>
<tr>
<th>Travel Provider</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dallas</td>
<td>31</td>
</tr>
<tr>
<td>Nakhal</td>
<td>23</td>
</tr>
<tr>
<td>Mawakeb</td>
<td>14</td>
</tr>
<tr>
<td>Booking.com</td>
<td>12</td>
</tr>
<tr>
<td>Wild Discovery</td>
<td>12</td>
</tr>
<tr>
<td>Expedia</td>
<td>8</td>
</tr>
<tr>
<td>Tania travel</td>
<td>8</td>
</tr>
<tr>
<td>Kurban Travel</td>
<td>8</td>
</tr>
<tr>
<td>Holiday international travel</td>
<td>8</td>
</tr>
<tr>
<td>Royal Jordanian</td>
<td>5</td>
</tr>
<tr>
<td>5 stars</td>
<td>5</td>
</tr>
<tr>
<td>Jazeera airways</td>
<td>5</td>
</tr>
<tr>
<td>Trivago. Com</td>
<td>5</td>
</tr>
<tr>
<td>Trip Advisor</td>
<td>5</td>
</tr>
<tr>
<td>Barakat travel &amp; holiday</td>
<td>4</td>
</tr>
<tr>
<td>Al Good</td>
<td>3</td>
</tr>
<tr>
<td>Lamis</td>
<td>2</td>
</tr>
<tr>
<td>samad</td>
<td>2</td>
</tr>
<tr>
<td>AirBnB</td>
<td>2</td>
</tr>
</tbody>
</table>

Sources of travel info

- I read online reviews to keep up-to-date with the latest offers: 30
- I noticed and reflected on advertising in print magazines: 6
- I noticed and reflected on advertising on the internet: 22
- I went to travel websites to browse: 42
- I went into a travel agency to see what’s new: 26
- I spoke with friends/family/colleagues about travel: 42
- I followed travel vloggers/bloggers: 8
- I watched travel TV programmes: 6
- I signed up for email newsletters: 4
- I followed travel providers on social media: 23
- I read travel print magazines: 5
- I looked for travel ads by tour operators/travel agents: 31
- None of the above: 4
Online Search Points

### Process

- Compared flight prices online: 59
- Compared accommodation prices online: 59
- Checked online for activities to do at destination: 45
- Read online reviews by customers: 38
- Searched for discounts online: 35
- Visited travel providers' websites: 32
- Searched for packages online: 32
- Read sources such as general consumer advice: 29
- Watched videos: 27
- Read online reviews by travel experts: 26
- Used forums/social networking sites: 22
- Followed up on links in emails from travel providers: 13
- Clicked on a banner ad: 6

### Top websites

1. Booking.com: 51
2. Trivago: 36
3. Trip Advisor: 32
4. Expedia: 31
5. AirBnB: 21
6. Hotels.com: 13
7. None of these: 11
8. Skyscanner: 11
9. Wego: 10
10. Agoda: 9
11. Hoojoozat: 9
12. Kayak.com: 8
13. Yamsafer: 7
14. Emirates Airlines: 6
15. Almosafer: 5
16. Rehlat: 4
17. Emirates Holidays: 4
18. Holiday Factory: 4
19. Al Tayyar: 3
20. Tajawal: 3
21. Musafir: 2

Multiple Answers
Offline Search Points

**Process**
- Asked for opinions and recommendations from friends, relatives, colleagues: 41
- Went to a travel agency to compare products and prices: 37
- Went to a travel agency to look for packages: 37
- Read about travel products in catalogues, flyers or postcards: 18
- Read articles about travel products in a magazine: 16
- Went to a travel agency spontaneously, without a specific goal in mind: 14

**Top Agents**
- Nakhal: 19
- Dallas: 13
- Wild Discovery: 11
- Barakat travel & holiday: 7
- Travco: 7
- Kurban Travel: 6
- Jordan Tours: 6
- Petra Travel & Tourism: 5
- Dakkak Travel: 4
- Mawakeb: 4
- Royal Jordanian: 3
- Tania travel: 3
- Five star tours: 3
- AMEX travel: 2
- Rida International Travel & Tourism: 2
- Thomas Cook: 2
- Al Good: 1
- Al Jazeera: 1
- Anastasia Travel: 1
- Dahlan (UNIGLOBE): 1
- Magic Jordan: 1

Multiple Answers
Decision Process: Who Decides?

Female: 41
- Me only: 51
- Me, with help from others: 49

Male: 59
- Me only: 53
- Me, with help from others: 47
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)
General Considerations

Decision cycle

1. Destination
2. Budget
3. Duration
4. Accommodation
5. Itinerary
6. Activities
7. Where to book
8. Brand to book
9. Flight

Device used for search

- Smartphone: 87
- Laptop: 54
- Desktop: 25
- Tablet: 8
- Phablet: 1

Multiple Answers
Destination Evaluation

### Accommodation

- **Accommodation cost**: 64
- **Hotel location (city, resort, distance)**: 61
- **Hotel classification (5 star, 4 star etc.)**: 51
- **Hotel rating (customer feedback, reviews)**: 48
- **Hotel’s policy on social responsibility / eco-friendly**: 11

### Transportation

- **Cost of the flight tickets**: 58
- **Itinerary (stop overs, waiting times, duration)**: 40
- **Airline reputation (safety, services)**: 39
- **Other transportation costs (taxi, Uber, car rental)**: 24
- **Airline reviews (customer feedback)**: 19

*Multiple Answers*
Activities Considerations

- Cost of activities: 40%
- Activities (what to do): 35%
- Availability of family friendly activities/places: 28%
- Availability of halal, vegetarian or vegan food: 25%

Multiple Answers

- Shopping: 46%
- Sightseeing: 41%
- Excursions / cruises: 36%
- Trying different foods and cuisines / restaurants: 31%
- Entertainment: 28%
- Relaxing and pampering: 28%
- Attending concerts / plays: 19%
- Cultural events: 18%
- Hajj & Umrah: 15%
- Doing or attending sports: 14%
- VFF: 14%
- Social events: 4%
- Work: 4%
- Health and medical: 3%
Search Cycle vs. Time Spent

- Total search
- I came to a conclusion very quickly
- I spent a considerable amount of time
- I spent some time on this

<table>
<thead>
<tr>
<th>Destination</th>
<th>Activities</th>
<th>Transportation/flight</th>
<th>Accommodation</th>
<th>Duration</th>
<th>Accommodation cost</th>
<th>Transportation cost</th>
<th>Activities cost</th>
<th>Shortlisting options</th>
<th>Package search</th>
<th>Wait for the deal to materialize</th>
<th>Make the actual booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>43</td>
<td>49</td>
<td>48</td>
<td>49</td>
<td>30</td>
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<td>65</td>
<td>47</td>
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</tbody>
</table>

I came to a conclusion very quickly
I spent a considerable amount of time
I spent some time on this

213
### Change of mind (during the process of search)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tr>
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<td>Activities</td>
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<tr>
<td>Duration</td>
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<tr>
<td>Activities cost</td>
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<tr>
<td>Transportation cost</td>
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<tr>
<td>Itinerary</td>
<td>40</td>
</tr>
<tr>
<td>Destination</td>
<td>27</td>
</tr>
</tbody>
</table>

### Trigger for making the booking

- **Compelling advert**: 36
- **Finances became available**: 9
- **Found a package**: 4
- **Worried prices might go up**: 1

- **Enough information to make a decision**: 48
Searched Online but Booked Offline

- Don’t trust online payments: 26
- Wanted to talk to a travel agent in-person: 25
- Went to favourite agent: 22
- More convenient to go into a travel agent: 21
- Was able to find a good package: 21
- Flexibility in managing bookings: 21
- It was cheaper: 21
- Easier to reach a decision in agent’s office: 18
- More information was available in agent’s office: 17
- Friend/family member recommended an agent: 15
- Pricing structure was not clear / hidden charges: 15
- Advertisement for the agent: 7
- Free travel insurance: 5
- Popped in randomly: 3

Multiple Answers
Leisure Travel... How?

**Search**
- Online: 89
- Offline: 11

**Book**
- Online: 78
- Offline: 22

**Pay**
- Bank transfer: 57
- Cash: 10
- Credit card: 22
- Debit card: 30
- Other: 21

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Count</th>
</tr>
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<tbody>
<tr>
<td>Flights</td>
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<tr>
<td>Accommodation</td>
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<tr>
<td>Transportation</td>
<td>23</td>
</tr>
<tr>
<td>Activities</td>
<td>19</td>
</tr>
<tr>
<td>A package combining flights and accommodation</td>
<td>20</td>
</tr>
<tr>
<td>A package combining flights, accommodation and activities</td>
<td>20</td>
</tr>
</tbody>
</table>

### Payment method

<table>
<thead>
<tr>
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<th>Method</th>
<th>Count</th>
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</thead>
<tbody>
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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

- It was more convenient (regardless of the price): 42
- It included more than what I wanted (i.e. encouraged me to do certain activities): 32
- The price was encouraging: 59

... not to Package

- It was not convenient (timing, duration, hotel location): 50
- It included more than what I wanted (i.e. was not interested in some activities): 29
- The price was not encouraging: 50
Package Components

Components

- Accommodation: 95%
- Flights: 94%
- Meal plan: 68%
- Airport transfers: 63%
- Activities: 50%
- Transportation during the holiday: 33%

Activities

- Shopping: 46%
- Site-seeing: 41%
- Excursions / cruises: 36%
- Trying different foods and cuisines / restaurants: 31%
- Entertainment: 28%
- Relaxing and pampering: 28%
- Attending concerts / plays: 19%
- Cultural events: 18%
- Hajj & Umrah: 15%
- Doing or attending sports: 14%
- Social events: 4%

Multiple Answers
Post-Booking

Amount Spent

- No budget in mind: 53
- More than budget: 8
- On budget: 4
- Less than budget: 35

General Satisfaction with the leisure booking

- Very satisfied: 36
- Satisfied: 56
- Neutral: 0.3
- Dissatisfied: 1
- Very dissatisfied: 7

Legend:
- No budget in mind
- More than budget
- On budget
- Less than budget
- Very satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very dissatisfied
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%)
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**: 61%
  - Online: 22%
  - Both: 13%
  - Offline: 5%
  - Don't know: 13%

- **Book**: 50%
  - Online: 22%
  - Both: 25%
  - Offline: 3%
  - Don't know: 22%

- **Pay**: 44%
  - Online: 27%
  - Both: 20%
  - Offline: 9%
  - Don't know: 9%
Business Travel... Who?

- **Search**
  - 69: The company
  - 26: Myself
  - 5: Travel Agent

- **Book**
  - 41: The company
  - 22: Myself
  - 38: Travel Agent

- **Pay**
  - 52: The company
  - 48: Myself
  - 0: Travel Agent
Business Travel

Frequency

- Once: 38
- Twice: 28
- 3 times: 14
- 4 times: 5
- 5 times: 8
- More than 5 times: 8

Duration

- Day trips – no overnight stay: -
- 1 night stay: 2
- 2 night stay: 6
- 3 night stay: 33
- 4 night stay: 22
- One week stay: 23
- More than a week's stay: 14
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.
THANK YOU