

# THE MIDDLE EAST TRAVELLER'S BEHAVIORS

PAIN POINTS, TRENDS AND OPPORTUNITIES OF THE  
MIDDLE EASTERN TRAVEL INDUSTRY

Sabre Space Jordan, 31 October 2019



# METHODOLOGY



**Middle East**

3090 people answered our survey

Five different countries in the Middle East took part  
- Saudi Arabia, Kuwait, UAE, Jordan and Lebanon

Travellers from the five countries surveyed  
Asked a series of questions about air travel

Commissioned by Sabre  
Surveys were taken online in October 2019

# OPPORTUNITY WITHIN AN EVOLVING MARKETPLACE

Main findings from Sabre report

- | Middle Eastern travellers demand and expect personalised travel experiences
- | With insecurity and lack of trust in online payments, offline travel agencies remain dominant
- | Mobile and online travel present a great opportunity if deployed with the right technology and security measures
- | Travellers willing to spend up to \$500 on ancillary services – golden retail opportunity for travel providers

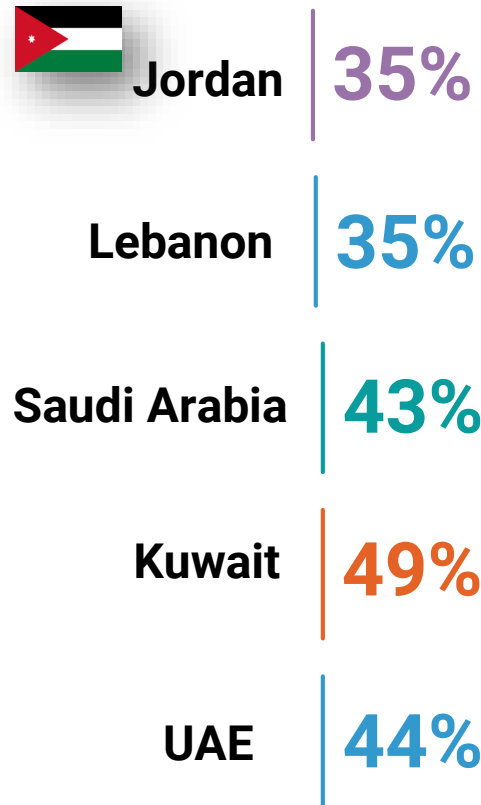
**“The Middle East travel landscape is evolving with great opportunities for all travel players if they learn how to operate like retailers and provide personalised and world class travel experience”**

**Salman Syed, VP EMEA, Sabre**

# TRAVEL PERSONALISATION AND EXPERIENCES

# DEMAND FOR PERSONALISATION

**43%** of Middle Eastern travellers want personalised travel offerings



# WHAT DOES PERSONALISATION MEAN TO THE MIDDLE EASTERN TRAVELLER?

40%



Wanted recommendations based on their budget

32%



Wanted recommendations to locations that would be of interest

30%



Wanted recommendations on holidays extras of a genuine interest to them

30%



Want a recommendation of a whole flight experience

# WHAT DOES PERSONALISATION MEAN TO THE MIDDLE EASTERN TRAVELLER?



47%

40%



Wanted recommendations based on their budget



33%

32%



Wanted recommendations to locations that would be of interest



28%

30%



Wanted recommendations on holidays extras of a genuine interest to them



33%

30%



Want a whole flight experience

# PERSONALISATION, LOYALTY AND PERSONAL DATA

Middle Eastern travellers are willing to share personal data and be loyal to a provider if they received a more personalised service in return



40%

Would be more loyal to an airline, a hotel or an agency in return for a personalised service



31%

Willing to share their location with an airline, a hotel or an agency in return for a personalised service



27%

Willing to share personal data (date of birth, social media friends list), in return for a personalised service



# PERSONALISATION, LOYALTY AND PERSONAL DATA

This is how Jordanian travellers compare



**42%**

40%

Would be more loyal to an airline, a hotel or an agency in return for a personalised service



**35%**

31%

Willing to share their location with an airline, a hotel or an agency in return for a personalised service



**28%**

27%

Willing to share personal data (date of birth, social media friends list), in return for a personalised service

# THE ANCIELLARY RETAIL OPPORTUNITY

# MIDDLE EASTERN TRAVELLERS ARE WILLING TO PAY UP TO \$500 TO PERSONALISE TRAVEL

Travellers will pay for value

57%

Willing to pay \$100-\$500  
for a personalised inflight  
experience

64%

Willing to pay \$100-\$500  
for a personalised hotel  
experience

58%

Willing to pay \$100-\$500  
for localised tour  
experiences

# MIDDLE EASTERN TRAVELLERS ARE WILLING TO PAY UP TO \$500 TO PERSONALISE TRAVEL

This is how Jordanian travellers compared



**66%**

58%

Willing to pay up to \$500  
for a personalised inflight  
experience



**74%**

64%

Willing to pay up to \$500  
for a personalised hotel  
experience

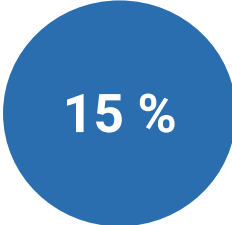


**74%**

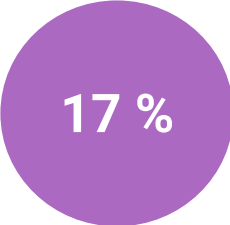
58%

Willing to pay up to \$500  
for localised tour  
experiences

# LUXURY MIDDLE EASTERN TRAVELER



Are willing to spend \$500-\$1000 on their inflight experience



Are willing to spend \$500-\$1000 on their hotel experience



Are willing to spend \$500-\$1000 on localised tour experiences

# ALMOST 90% MIDDLE EASTERN TRAVELLERS SHOP FOR TRAVEL ONLINE

# WHERE ARE MIDDLE EASTERN TRAVELLERS SHOPPING FOR TRAVEL?

When shopping and booking travel, inspiration comes from many sources



48%



41%



20%



36%



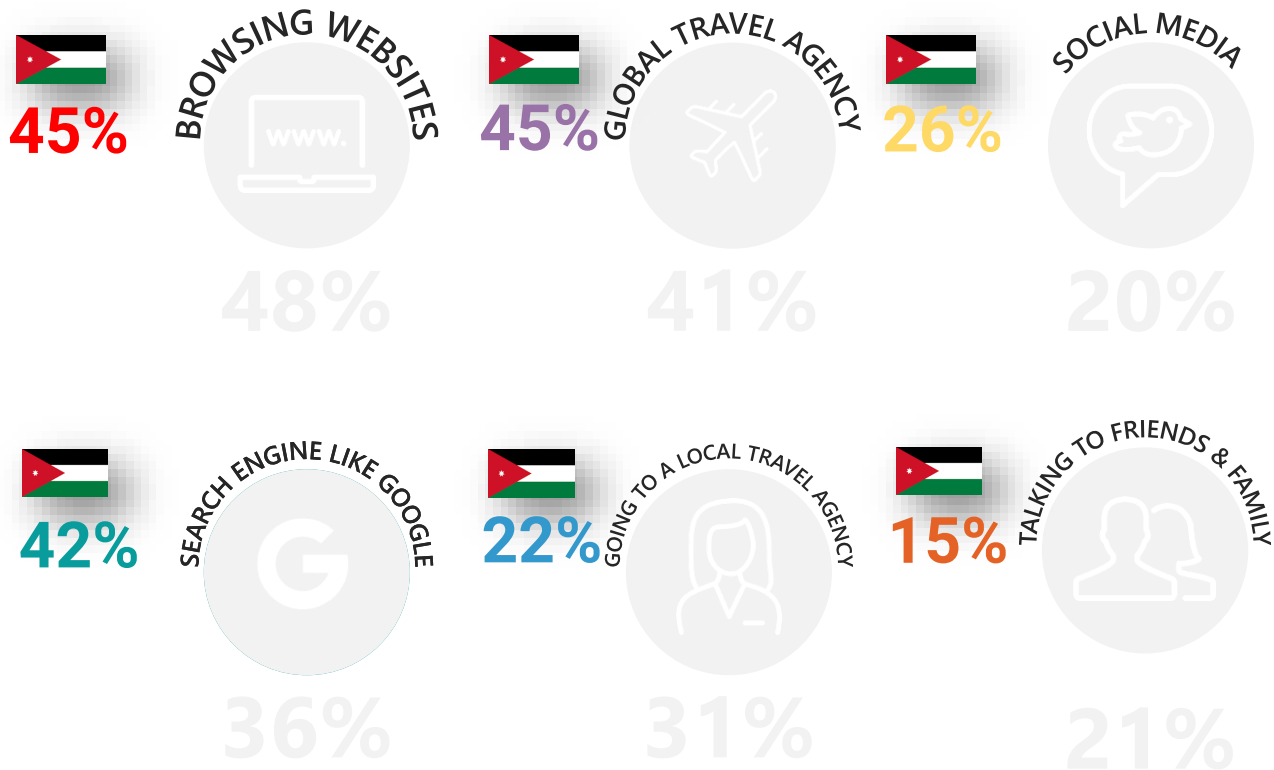
31%



21%

# WHERE ARE MIDDLE EASTERN TRAVELLERS SHOPPING FOR TRAVEL?

Here's how Jordanian travellers compare to others in the region





# BUT... THERE ARE SOME OBSTACLES FOR THOSE BOOKING ONLINE

There is room for improvement from the travel industry



# RECOMMENDATIONS

Five takeaways for the Middle Eastern travel industry

**Invest in technology** – be where the travellers are: mobile and online

**Know your travellers** – service and comfort for travellers, and help them find your lowest prices

**Operate like a retailer** – invest in data-harnessing technology to help understand each traveller's individual needs, offering each person a customised experience in the right context at the right time

**Personalization** - travellers are willing to pay for experience and value. Know what that mean to them and upsell.

**Inspire travellers** – adopt a multi-channel sales strategy across both new and traditional channels, such as through travel agents, websites and mobile

**THANK YOU**

***Sabre***

A white wireframe graphic of a mountain range, composed of interconnected lines forming various polygonal shapes, set against a solid red background. The graphic is positioned on the right side of the image, extending from the bottom towards the top.