ADARA

From Far and Wide... MENA Traveler Insights

Based on Travel Trends of 2015

The Middle East and North Africa (MENA) is an increasingly popular destination for both business and leisure.

ADARA has mined its internal travel data to help marketers better understand:

- **Who** travels to MENA
- **Where** MENA Travelers come from
- Their **top destinations**
- Their **search and booking process**

Key Insights:

- MENA is a top destination globally; given the diversity of the business community, geo-political climate and leisure/tourism activities, different destinations attract visitors from different countries
- US visitors in particular are spending more per night on hotel stays in MENA
- Given the long distances that many visitors travel to MENA, their timelines for booking are longer than average. Marketers have 9 days to reach travelers with their messages from the time they make their first search to booking their flight. Similarly, there are 6 days from the time they search for their first hotel to the actual purchase
- Travelers to MENA explore other options in the Middle East, Europe and Asia while they are planning their flights. They are open to a wider range of destinations for business meetings and/or leisure travel.

Who Travels to MENA?

- MENA Travelers are predominantly **male** (78%), more so than the average Global Traveler (67%)
- Over a third (38%) are **Elite Flyers** (purchased front-of-cabin tickets at least once in the past 6 months)
- 65% of bookings among those belonging to hotel **loyalty programmes** were purchased by elite status members

Where do MENA Travelers come from?

Travelers from **Asia** (India and Pakistan), the **United States**, **Europe** and **Australia** are all booking trips to MENA.

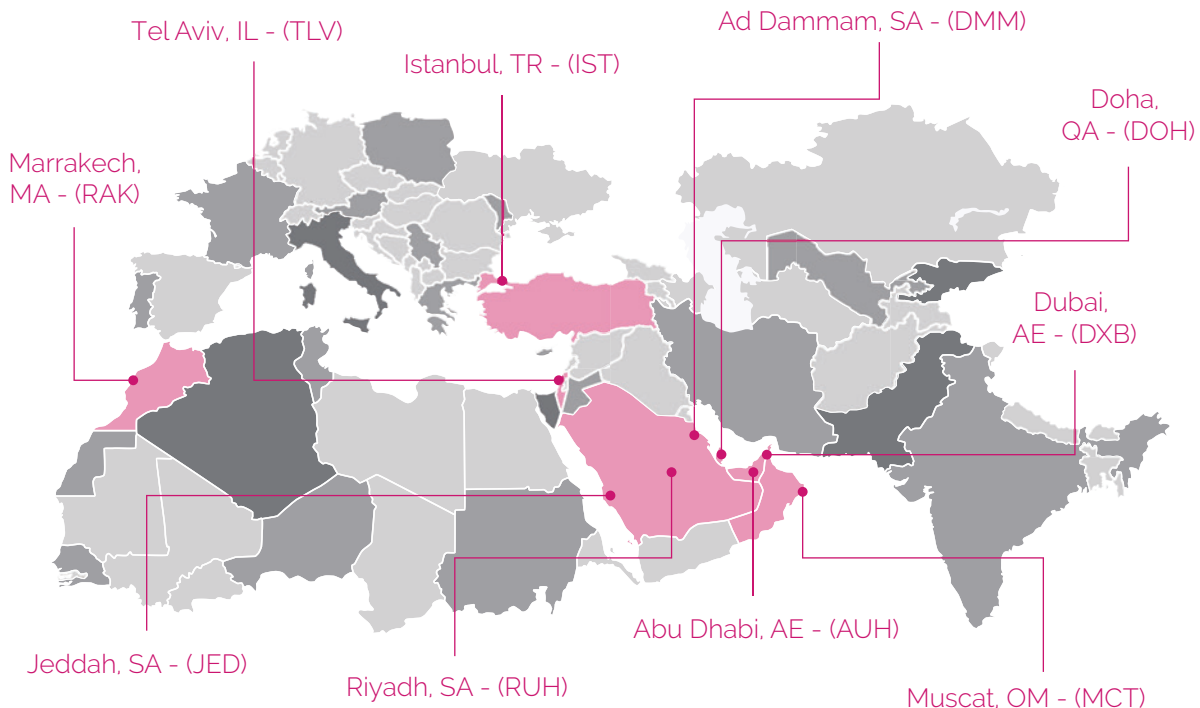**Top 10 originating countries for travel to MENA:**

- India
- United States
- United Kingdom
- Pakistan
- Italy
- France
- Canada
- Australia
- Germany
- Spain

MENA Travelers' Top Destinations

Dubai, as a leading business, shopping and resort area tops the list, followed by **Abu Dhabi, Istanbul** and **Tel Aviv.**

Top 10 MENA destinations:

Tel Aviv, IL - (TLV)

Istanbul, TR - (IST)

Ad Dammam, SA - (DMM)

Doha, QA - (DOH)

Marrakech, MA - (RAK)

Dubai, AE - (DXB)

Jeddah, SA - (JED)

Riyadh, SA - (RUH)

Abu Dhabi, AE - (AUH)

Muscat, OM - (MCT)

Top Originating Countries Vary by MENA Destination

India and the **United Kingdom** are the top two originating countries for **Dubai**, with three **African** nations (Nigeria, South Africa and Ethiopia) also ranking in the top ten.

The **United States** and **Hungary** top the list for **Tel Aviv**. Other top countries herald from **North America** (Canada), and **Eastern and Western Europe.**

Dubai (DXB)

- India
- United Kingdom
- United States
- Australia
- Pakistan
- Saudi Arabia
- Italy
- Nigeria
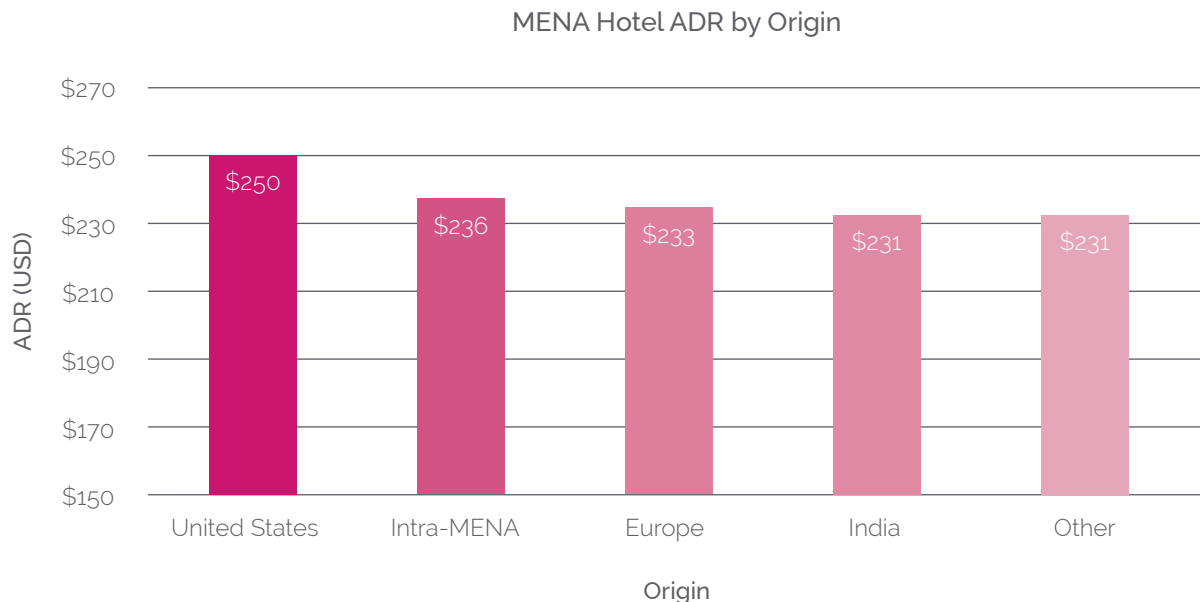- South Africa
- Ethiopia

Tel Aviv (TLV)

- United States
- Hungary
- United Kingdom
- Canada
- Poland
- Italy
- Romania
- Russia
- France
- Germany

MENA Travelers Spend on Hotels

On average, MENA Travelers spend over **$230 per night** per hotel room, with those from the United States spending the most at **$250 per night** on average.

MENA Hotel ADR by Origin

ADR (USD)

- United States: $250
- Intra-MENA: $236
- Europe: $233
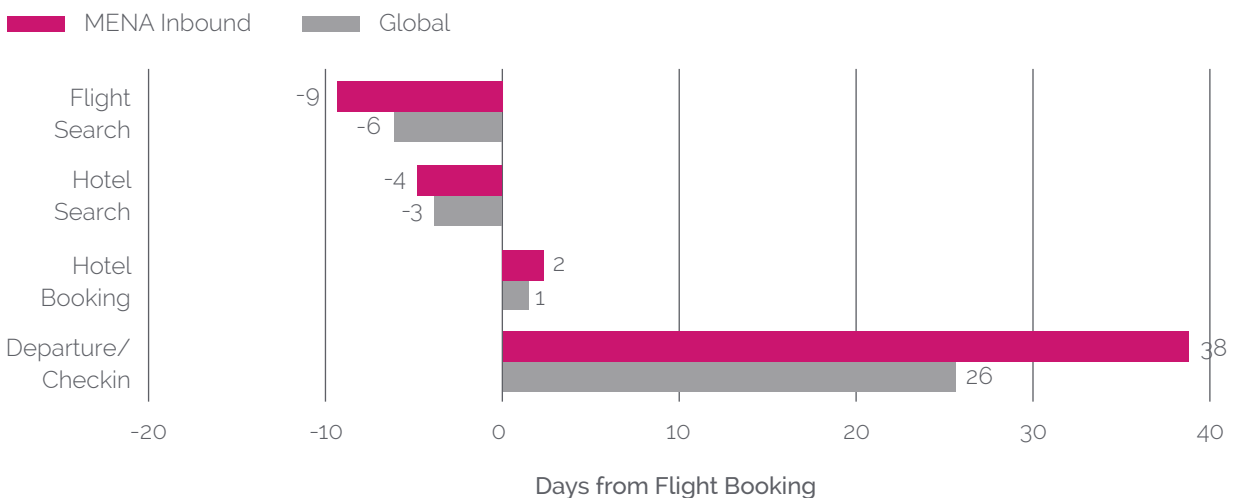- India: $231
- Other: $231

Origin

Advanced Planning is Required

MENA Travelers begin researching their purchases further in advance than the average Global Traveler.

On average, **nine days** elapse between first searching for a flight to booking a flight. The hotel search process starts **five days later** and hotels are booked **two days after** the flight. Flights are also purchased **further in advance** of travel dates – 38 days on average versus 26 days in advance for global bookings.

Trip Planning - MENA Inbound vs. Global
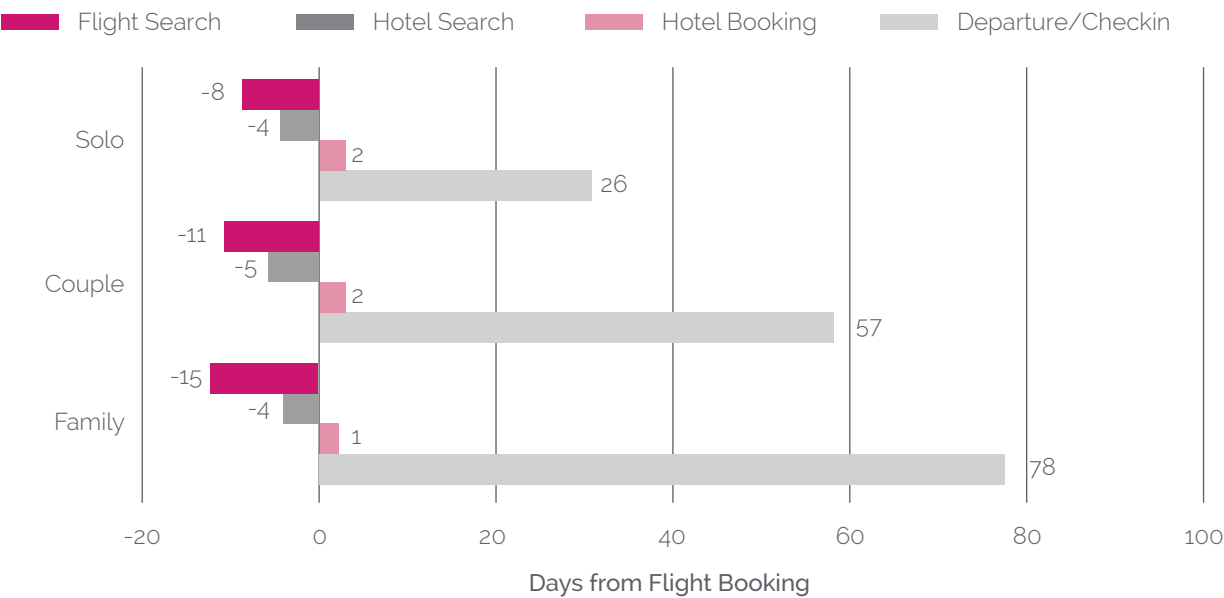

■ MENA Inbound   ■ Global

- Flight Search: MENA Inbound -9, Global -6
- Hotel Search: MENA Inbound -4, Global -3
- Hotel Booking: MENA Inbound 2, Global 1
- Departure/Checkin: MENA Inbound 38, Global 26

Days from Flight Booking

Advanced Planning is Required (continued)

Families (three-plus MENA Travelers) on average start searching **over two weeks** before making a booking, and purchase tickets **almost 80 days** in advance. **Couples** (two MENA Travelers) start searching **ten days** prior to a booking, and purchase **two months** in advance of their flight.

MENA Inbound Trip Planning Timeline

Legend: Flight Search | Hotel Search | Hotel Booking | Departure/Checkin

Solo
- Flight Search: -8
- Hotel Search: -4
- Hotel Booking: 2
- Departure/Checkin: 26

Couple
- Flight Search: -11
- Hotel Search: -5
- Hotel Booking: 2
- Departure/Checkin: 57

Family
- Flight Search: -15
- Hotel Search: -4
- Hotel Booking: 1
- Departure/Checkin: 78

x-axis: Days from Flight Booking (-20, 0, 20, 40, 60, 80, 100)
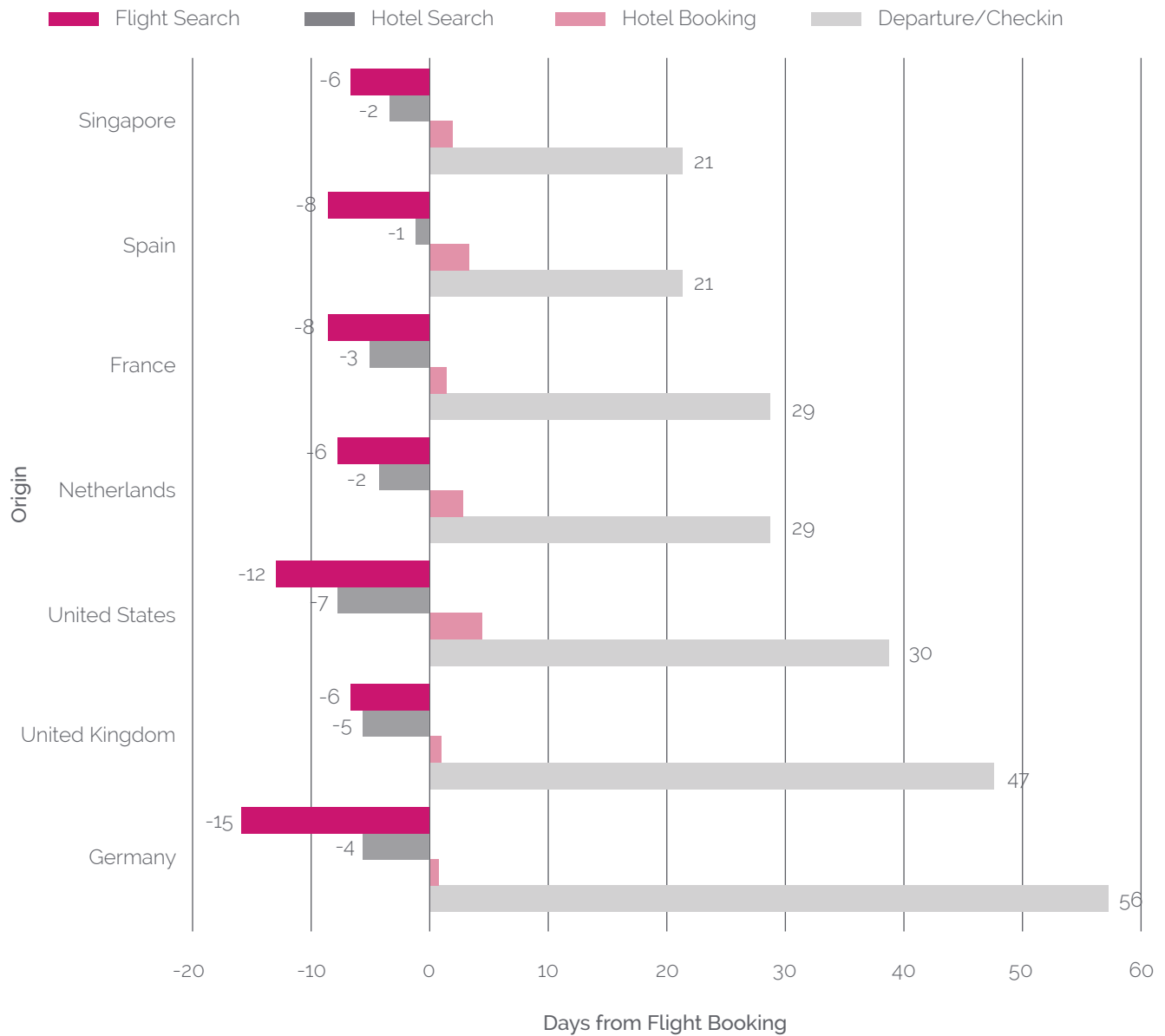
Advanced Planning Means Multiple Searches

With distance and expense in mind, MENA Travelers conduct **multiple searches** prior to booking their flights. This is most pronounced for **Families**, who make **ten searches** on average prior to booking a flight versus **Solo Travelers** who conduct **seven searches** on average.

Avg. Number of Searches Prior to Booking

- Solo: 6.6
- Couple: 7.5
- Family 3+: 9.8

y-axis: Number of Searches (0, 2, 4, 6, 8, 10, 12)
x-axis: Number of Travelers

Planning Timeline Varies by Origin

Those traveling **further** to get to MENA tend to book **further in advance** of their trip. Travelers originating from **Germany** start their search about **two weeks** prior to booking travel and book their flights almost **two months** in advance of their flight. Those traveling from the **United States** on average search **over ten days** in advance and book **almost 40 days** prior to their flight.

MENA Inbound Trip Planning By Origin

█ Flight Search   █ Hotel Search   █ Hotel Booking   █ Departure/Checkin

Origin	Flight Search	Hotel Search	Hotel Booking	Departure/Checkin
Singapore	-6	-2	(2)	21
Spain	-8	-1	(3)	21
France	-8	-3	(1)	29
Netherlands	-6	-2	(3)	29
United States	-12	-7	(4)	30
United Kingdom	-6	-5	(1)	47
Germany	-15	-4	(1)	56

Days from Flight Booking

-20   -10   0   10   20   30   40   50   60

Alternative Destinations

Most MENA Travelers have **various options** as to where to fly. ADARA looked at alternate locations searched for by those who booked flights to the following areas, which varied by destination. For **Abu Dhabi**, **Doha** and **Dubai**, the top other locations searched were also in **MENA**, whereas for **Istanbul** and **Tel Aviv**, the top other locations searched were in Europe.

Abu Dhabi

- Dubai, AE – (DXB)
- Bangkok, TH – (BKK)
- London, GB – (LHR)
- Sydney, AU – (SYD)
- New York, NY, US – (JFK)
- New Delhi, IN – (DEL)
- Hyderabad, IN – (HYD)
- Singapore, SG – (SIN)
- Cairo, EG – (CAI)
- Mumbai, IN – (BOM)

Doha

- Dubai, AE – (DXB)
- Abu Dhabi, AE – (AUH)
- New Delhi, IN – (DEL)
- Chennai, IN – (MAA)
- New York, NY, US – (JFK)
- Washington, DC, US – (WAS)
- Manama, BH – (BAH)
- Muscat, OM – (MCT)
- Chicago, IL, US – (ORD)
- New York, NY, US – (NYC)

Dubai

- Abu Dhabi, AE – (AUH)
- Mumbai, IN – (BOM)
- New Delhi, IN – (DEL)
- Singapore, SG – (SIN)
- Bangkok, TH – (BKK)
- New York, NY, US – (JFK)
- Washington, DC, US – (IAD)
- London, GB – (LHR)
- San Francisco, CA, US – (SFO)
- Istanbul, TR – (IST)

Istanbul

- Athens, GR – (ATH)
- Antalya, TR – (AYT)
- Amsterdam, NL – (AMS)
- Madrid, ES – (MAD)
- Barcelona, ES – (BCN)
- London, GB – (LHR)
- Kayseri, TR – (ASR)
- Frankfurt-am-Main, DE – (FRA)
- Paris, FR – (PAR)
- London, GB – (LON)

Tel Aviv

- Budapest, HU – (BUD)
- London, GB – (LTN)
- Bucharest, RO – (OTP)
- New York, NY, US – (NYC)
- Barcelona, ES – (BCN)
- Bergamo, IT – (BGY)
- Warsaw, PL – (WAW)
- Madrid, ES – (MAD)
- London, GB – (STN)
- Newark, NJ, US – (EWR)

Key Takeaways

- MENA Travelers are culturally **diverse** – travelling from **far and wide** to visit the region's best business and leisure destinations

- MENA Travelers love a **loyalty** scheme – a **key incentive** for this group

- MENA Travelers spend on **hotels** – in search of **luxury**

- **Pin down those MENA Travelers early** – they have **so many options** available (don't lose them to Europe!)

Methodology

ADARA's transactional travel data is based on its relationships with over 175 global travel brands. ADARA is in a unique position to assess real-time travel searches and determine what patterns in the data reveal about the past travel season, to help marketers determine how such trends will impact future travel.

All data in this report refers to searches and bookings during the period of Jan to Dec 2015.

ADARA is the world's travel data co-op providing a unique holistic understanding of travel patterns, trends and behavior. It's a safe and secure way to share and analyze historical and real time data about more than 500 million monthly unique traveler profiles from more than 175 of the world's top travel brands.

The ADARA data co-op fuels three core business areas: Advertising, Measurement & Analytics and Traveler Intelligence. Together they provide unparalleled access to insights and knowledge allowing travel marketers to increase marketing efficiency, maximize revenues and grow their brands.

Let's Travel Together

ADARA is headquartered in Palo Alto, California and has 20 offices across North America, Europe, Middle East and Asia Pacific. Partners include Marriott, Accor, Etihad, United, American, Delta and Hertz. For more information visit ADARA.com or follow us on Twitter **@adaraglobal**