

Reopening Travel:

The Evolving Attitudes Towards Travel In Saudi Arabia

October 2020

GAME CHANGERS



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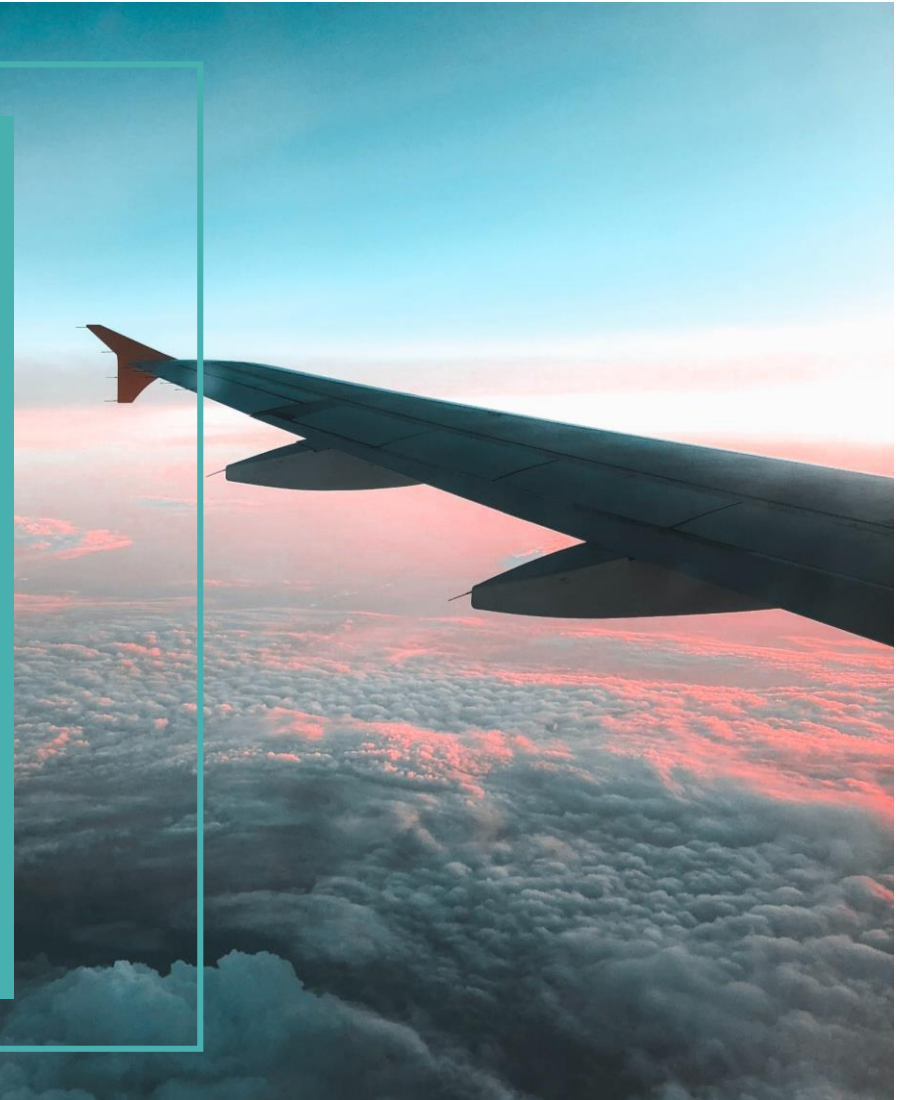
Prelude

Like most countries around the world, Saudi Arabia closed its airports in the wake of the coronavirus pandemic to limit the spread of the virus.

But given the importance of the travel and tourism industry and its contribution, the authorities decided to slowly remove the travel restrictions imposed, starting with domestic travel and followed more recently by international travel for exceptional categories. Normal travel is planned to resume by early 2021.

Saudi Arabia is also an important tourism source market, and the reopening of travel is welcome news not just domestically, but regionally and globally too. As such, understanding the attitudes of the Kingdom's travelers during this early stage is extremely important.

Using social listening data supported by a quantitative survey, this report looks at how attitudes towards travel have evolved during the last few months, the feelings and emotions associated with travel, the key concerns of travelers, and factors that would encourage people to travel again.



Research Methodology



Research Methodology



Social Intelligence Analytics



Methodology

Social Intelligence: mining data from social and mainstream media sources using the Ipsos social listening platform Synthesio.



Data Sources

Organic posts on local media sites including Twitter, Facebook, YouTube and Instagram, blogs, forums, and mainstream media content in Saudi Arabia.



Timeframe & Languages

March – September 2020
English & Arabic

Quantitative Survey



Methodology

Self-Administered Online Surveys



Sample

500 Residents In Saudi Arabia
Ages 16+, Males & Females,
Nationals & Expats
Nationwide Coverage



Fieldwork Dates

August 15th – September 5th, 2020



Summary Of Key Findings

Summary Of Key Findings



The Desire To Travel Has Been Steadily Increasing:

People are increasingly expressing their desire to travel again, with many reminiscing about the smallest travel moments such as packing, walking around the airport, and looking outside the airplane window. International travel is what travelers are missing most, with the domestic travel scene failing to meet their expectations.



But The Majority Are Still Not Comfortable Traveling Internationally:

Despite missing travelling, most are still not comfortable traveling abroad. People are mainly worried about a lack of proper implementation of safety measures across the travel journey. The economic impact of Covid-19 also contributes heavily with many not comfortable spending money on travel currently.



Across The Travel Journey, Sentiment Towards Accommodation Is Most Negative:

People worry more about contracting the virus at an airport or on a plane, but as more travelers start sharing their experiences, hotels are being perceived most negatively, with people complaining about low cleaning standards at a time when standards need to be exceeding expectations on the cleanliness front.



Improved Health Situation & Attractive Travel Offers Would Encourage People To Travel Again:

An equal number of people cite health improvement and attractive offers as factors that would make them consider traveling again. Those concerned about health would rather wait until a vaccine is available or a visible slowdown in the spread of the virus is seen, while deal seekers are interested in seeing better offers from airlines and hotels.

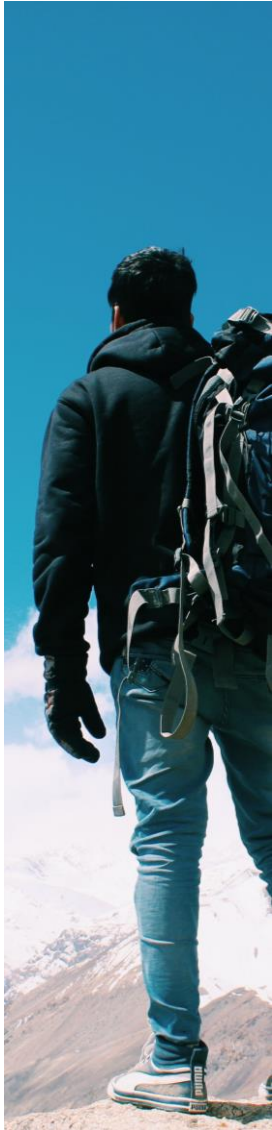
Travel Attitudes & Desires



Covid-19 Has Invaded Most Conversations Around Travel This Year

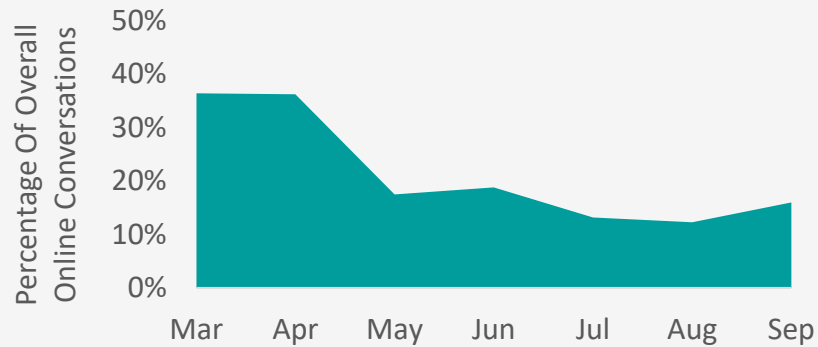


As Health Concerns Ease, Desire To Travel Is Starting To Pick Up

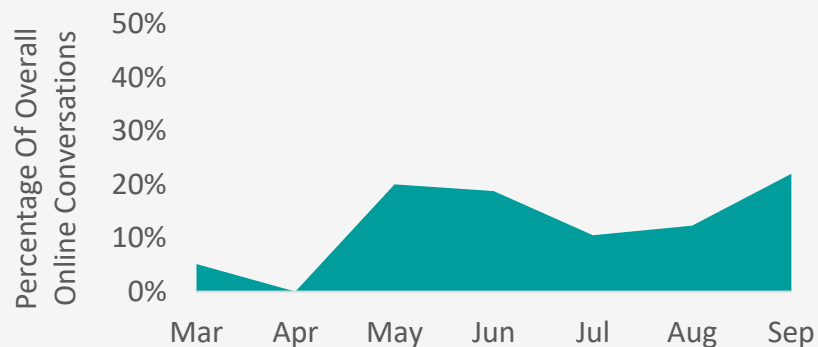


Evolution Of Online Travel Conversations Over Time

■ Online Conversations On Covid-19 Safety Measures



■ Online Conversations On Desire To Travel



At the start of the pandemic, people were more concerned about the spread of the virus, and so safety measures and travel regulations were the most discussed topics. At the time, the virus was still novel. New information about how the virus spreads kept being shared and governmental actions kept changing, which added to the uneasiness.

The main concern was that infected people would come in from abroad and bring the virus into the country with them. Hence, many people were requesting that the government take stricter measures, such as mandatory quarantine or only allowing travel for those with proof of negative Covid-19 tests. Stories about airplane passengers infecting entire planes and people leaving quarantine early did not help matters.

People also implored the government to only allow those with particular circumstances to travel to and from the Kingdom, namely citizens stuck abroad, expats wanting to return to their homes, and those who require medical attention. They also added that the country of arrival's Covid-19 status must be factored in.

As the summer months approached people were becoming less fearful. Demands for travel restrictions started giving way to conversations about people's desires to travel again, despite many still not being comfortable doing so.

Even The Smallest Things About Travel Have People Reminiscing

The Travel Moments That People Miss



Travel Day Nerves

The feeling of anxiety in making sure everything is packed, the passport isn't forgotten and feeling the need to go to the airport even though there are several hours left for departure.



Packing & Preparing

That final rush to get everything in order, scrambling to get last minute items, and having people asking you if you have everything you need for your trip.



Airport Drop-Off

Trying to get someone from your friends or family to drop you off or pick you up from the airport.



Walking Around The Airport

Going about your business and walking around the airport as well as walking through the tunnel and onto the plane to start your trip.



Airplane Window

Claiming your window seat and taking a picture of the clouds. Many people in KSA took up the window plane challenge, taking pictures that resemble ones taken from an airplane window.



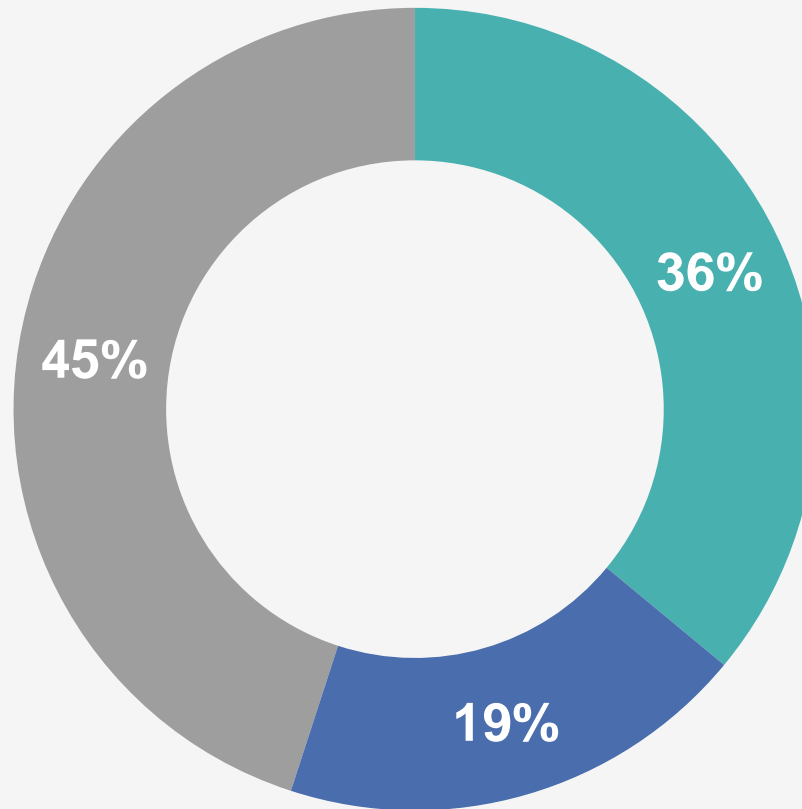
Hotel Mornings

The mornings spent at the hotel enjoying the breakfast buffet, heading to the hotel gym for some exercise, or just chilling in the room.

Travel Desire Is More Strongly Associated With International Travel

Share Of Online Conversations On Type Of Travel Desired

- Desire To Travel Generally
- Desire To Travel Internationally
- Desire To Travel Domestically



In line with their increasing desire for a travel experience, a good number of the people are **willing to travel anywhere**, as long as they can just go on another trip.

When looking at the type of travel people **most long for, international travel** is twice as likely to be mentioned compared to domestic travel despite the latter being open since June, as international travel experiences were seen as difficult to replicate domestically.

In fact, many were vocal about the country's perceived lack of readiness to have a thriving domestic tourism scene and saw the pandemic as a **missed opportunity** to promote the **domestic travel** industry.

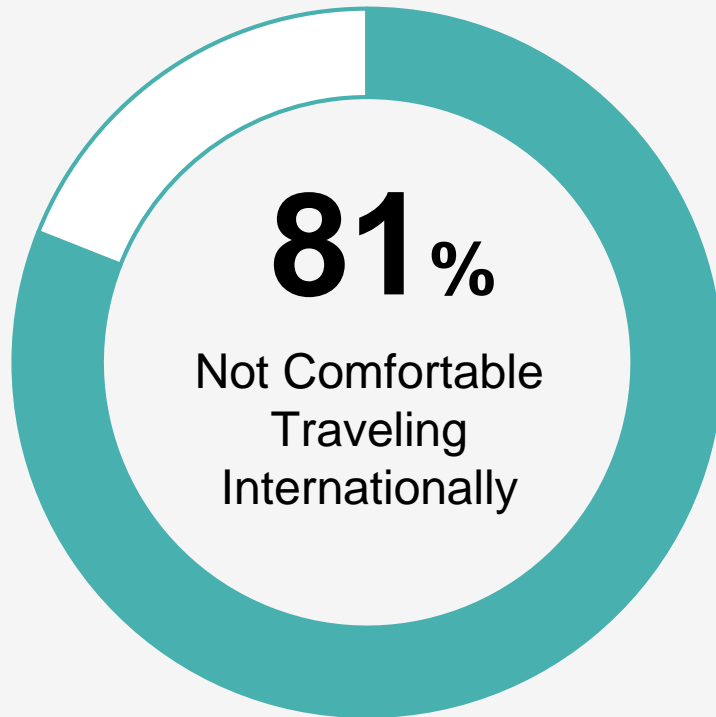
People were complaining about limited entertainment options, a lack of proper infrastructure to facilitate and improve domestic travel experiences, and poor management of local tourist sites.

Comfort Levels With Traveling



Most People Are Still Uncomfortable Traveling Outside The Country

Level Of Discomfort Towards International Travel



Despite the increasing desire to travel, and specifically to travel abroad, the majority of people are **still not comfortable traveling** internationally.

Naturally, the primary reason behind their discomfort is the **fear of being infected** with the virus while traveling at **various stages** of the travel journey, including airports, planes, accommodation, and activities done at the travel destination.

Another reason that has people staying put for now is the **lack of clarity** regarding the pandemic's situation and the impact that this might have on flight schedules changing, flights getting canceled altogether, airports and international borders closing down again, and the **fear of getting stuck abroad** if sudden changes happen while people are outside the country.

There is also an **economic factor** coming into play when it comes to people's comfort levels. Some travelers are simply **not comfortable spending money** on leisure activities at a time when many are suffering as a result of the pandemic. Furthermore, some people's weakened personal financial situation is a key factor.

Covid-19 & Economic Factors Top The List Of Travel Concerns



Top Concerns Surrounding Travel

32%

Covid-19 Spreading



13%

Convenience



11%

Lack Of Entertainment



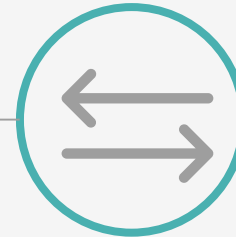
24%

Economy & Financials



11%

Stuck Abroad

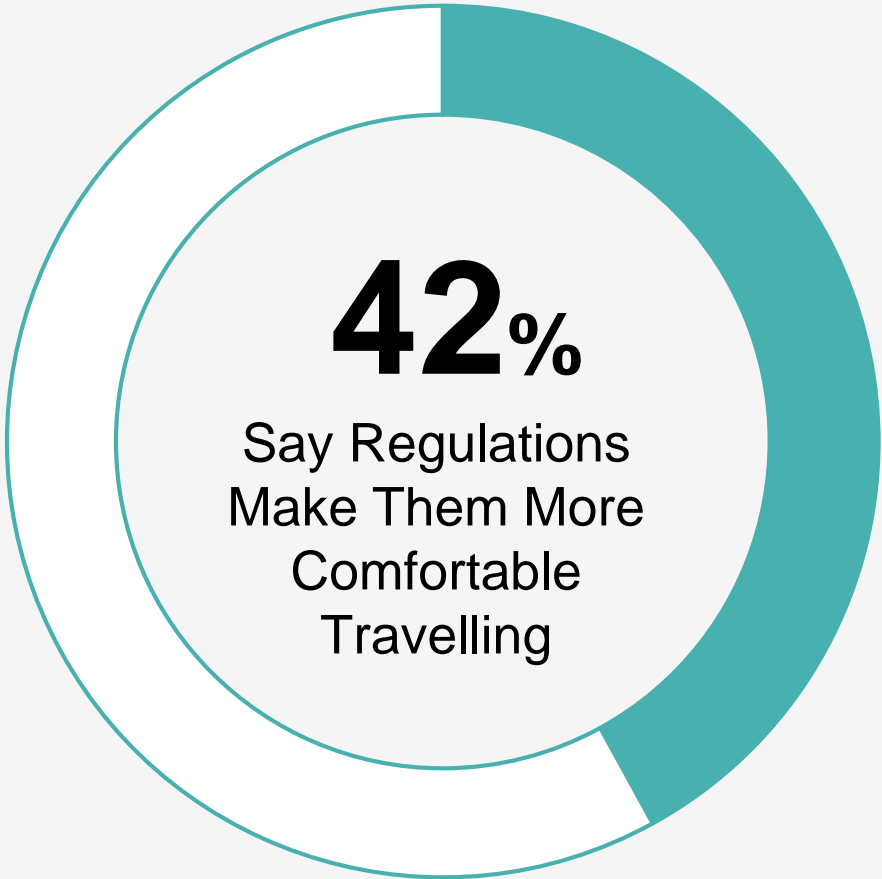


6%

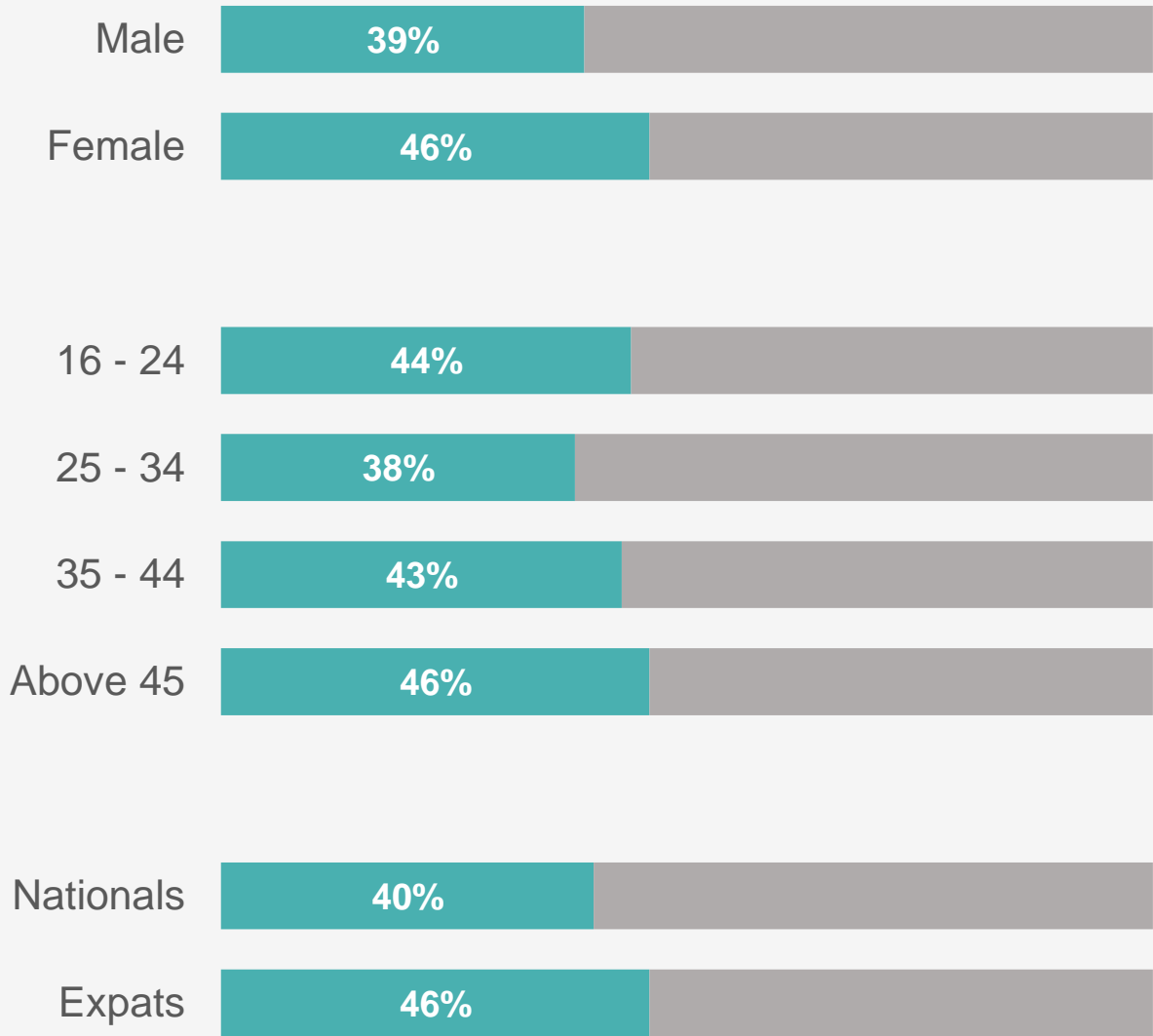
Changing Flight Status



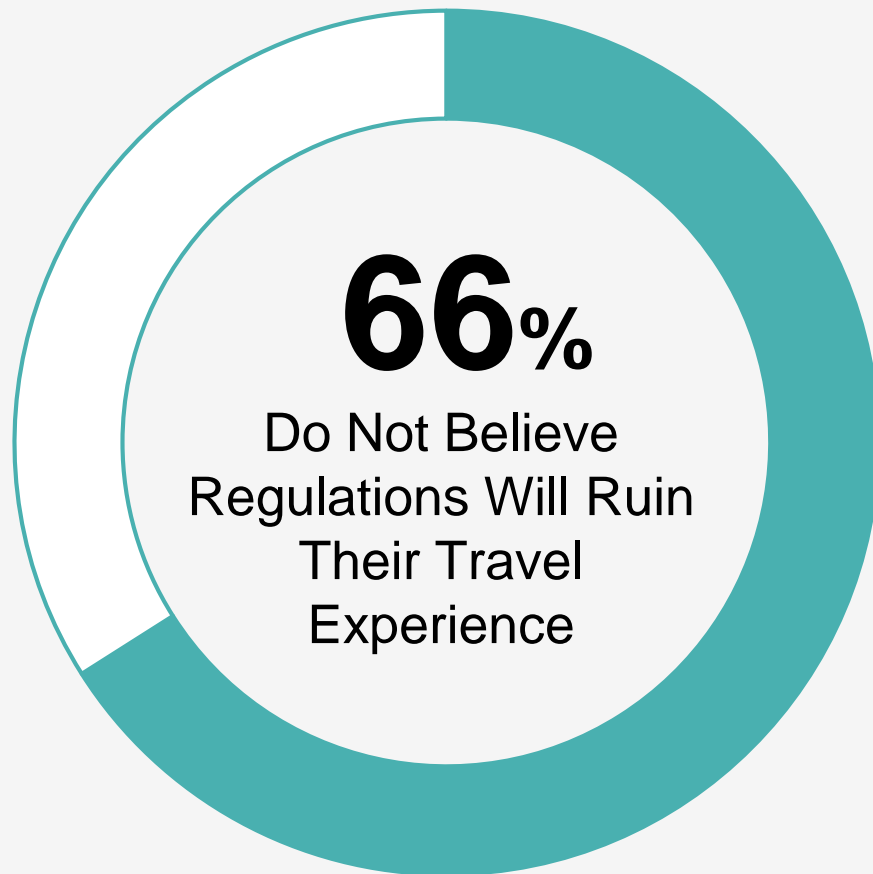
Safety Measures Do Not Necessarily Make People More Comfortable



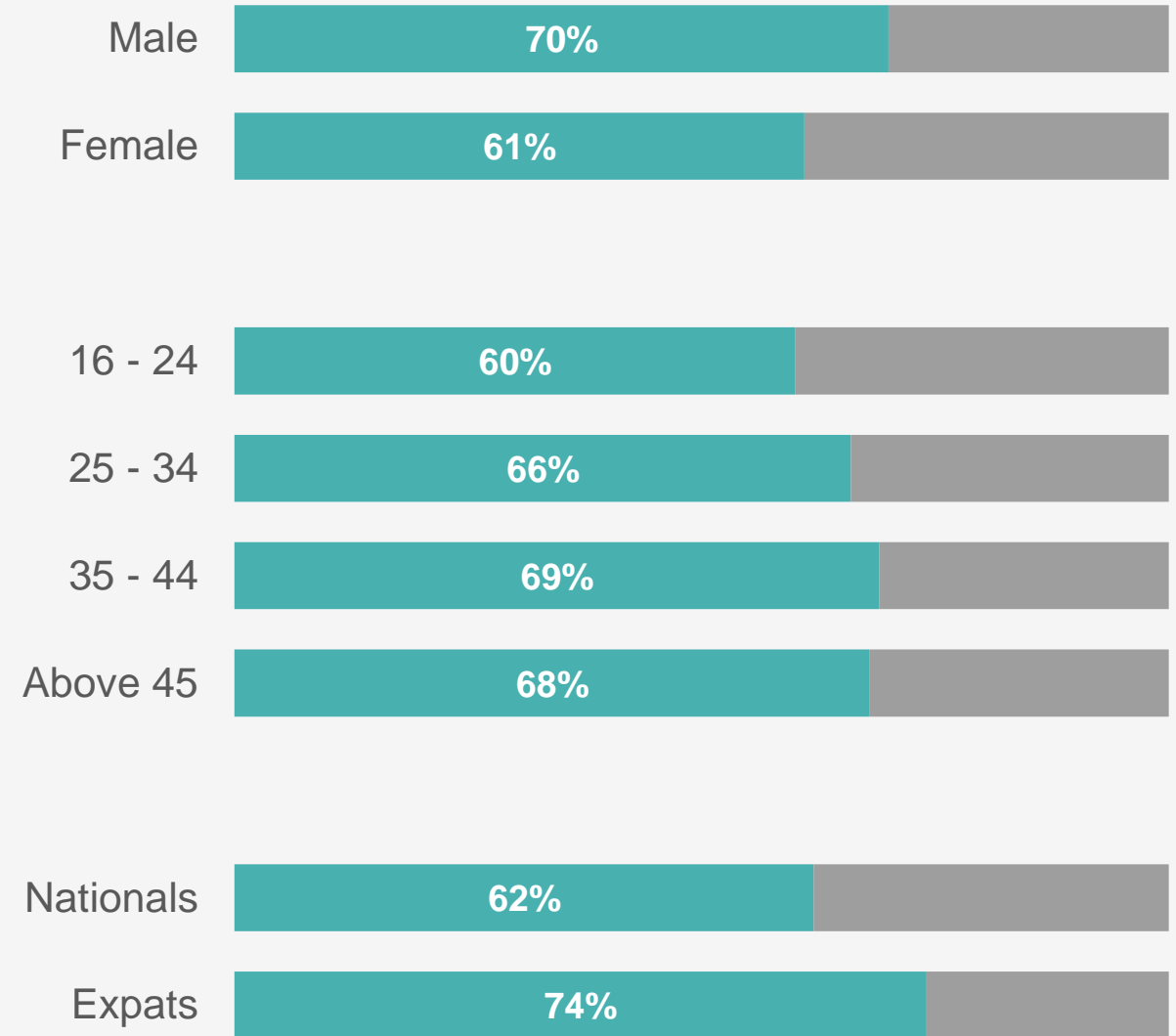
% agree with the above statement



And Most Don't Feel Regulations Will Ruin Their Travel Experience



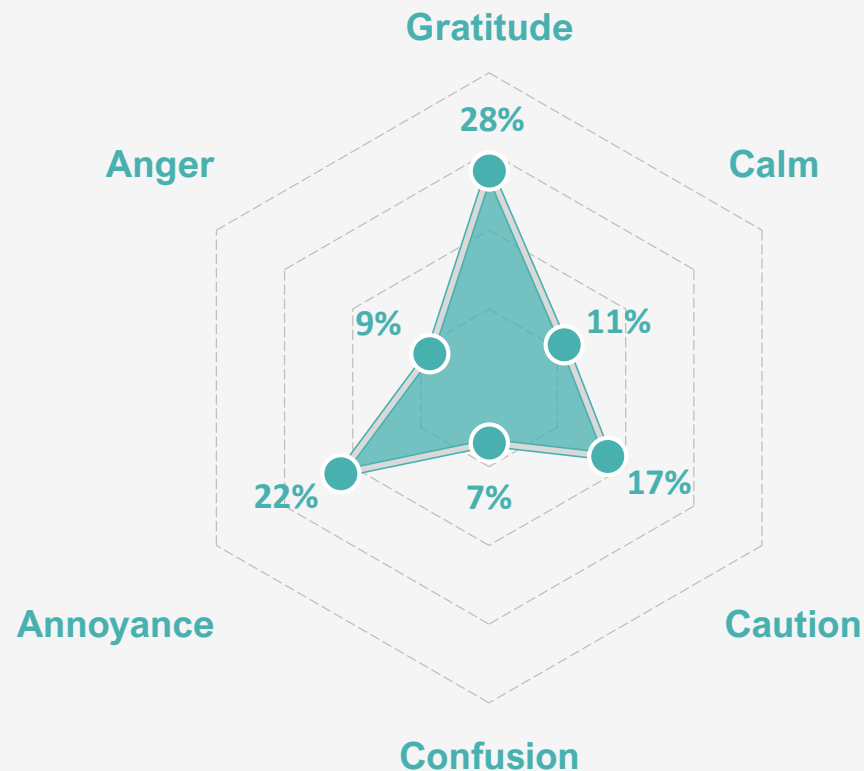
% agree with the above statement



People Have Mixed Emotions Regarding Travel Regulations



Emotions Regarding Performance On Covid-19 Travel Regulations



With the pandemic being a new experience to many, and as people heard more stories about travelers' experiences and newly announced regulations, **emotions were mixed**.

Initially, **gratitude** was one of the strong emotions exhibited as a large number of people were grateful **to the government** for taking swift measures in terms of airport closures and quarantining incoming travelers, but also for setting up travelers **at five-star hotels and bearing the cost**, comparing this action with other countries and highlighting how the Saudi government went above and beyond.

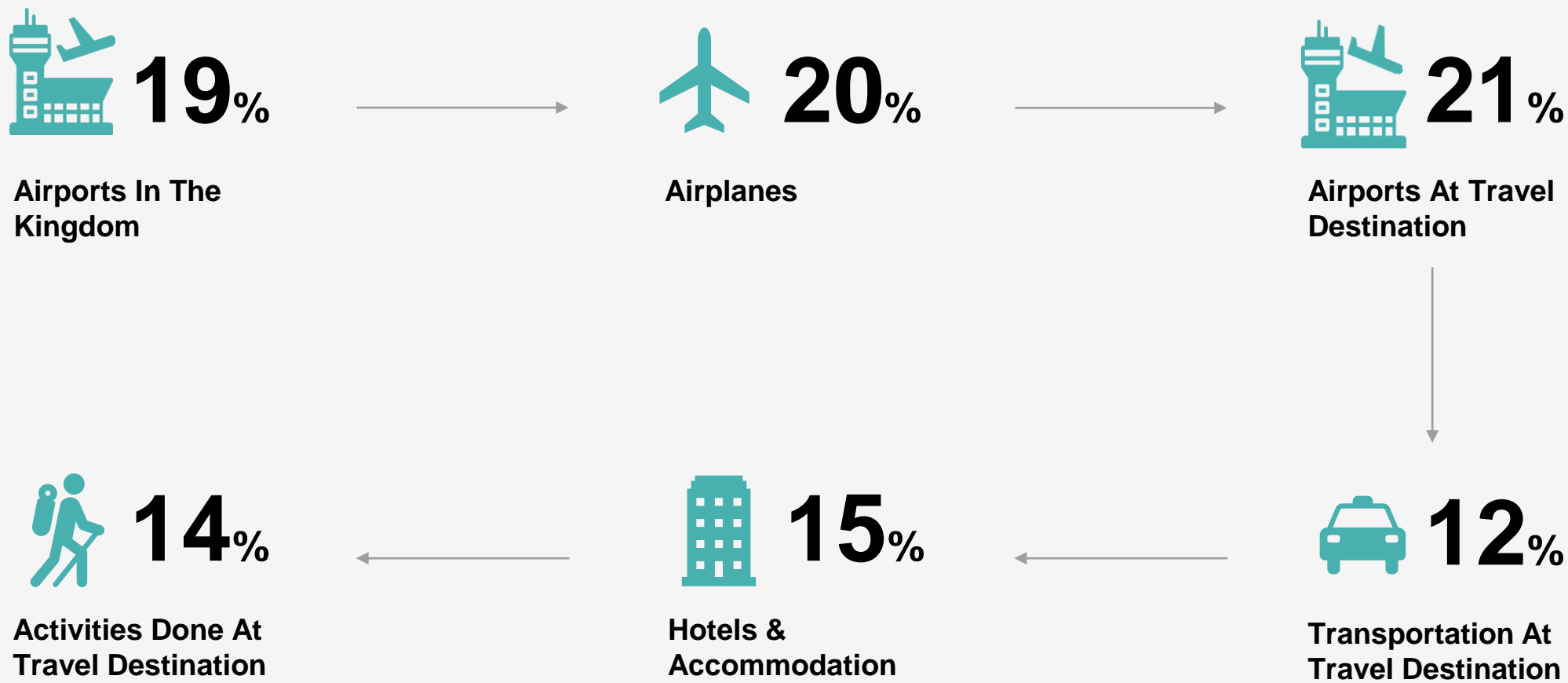
Others were more **cautious about travel regulations**, unsure if the measures in place would **sufficiently shield the country** from importing the virus, particularly when it comes to the quarantine period. For the most part, people were worried about the extent to which safety precautions are being respected by society itself.

At the other end of the spectrum were those who were **annoyed** by what they saw as **lax safety measures and recklessness** exhibited by airports, airplanes and hotels. They couldn't believe that full flights were still operating, asymptomatic people were passing the checks at the airports, airports were still accepting travelers from countries with a high number of Covid-19 cases and hotels were not properly sanitized.

Evaluating The Travel Journey Touchpoints

Airports Are The Part Of The Journey That Most Worries Travelers

Touchpoint That Travelers Are Most Concerned About

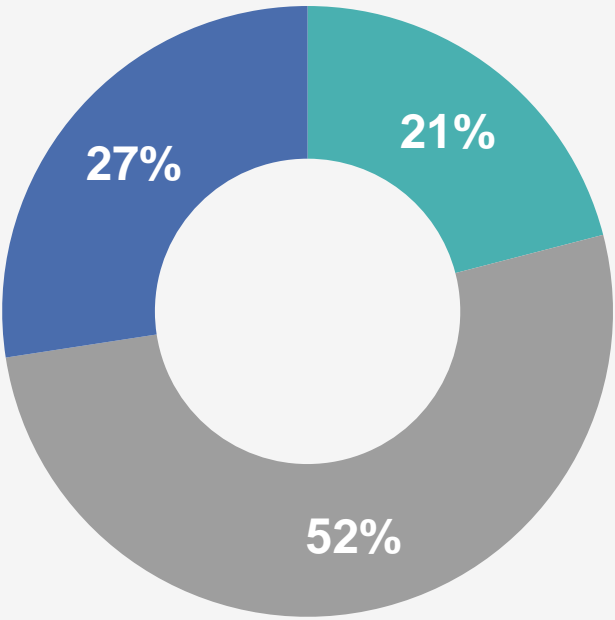


But People's Sentiment Is Most Negative Towards Accommodation

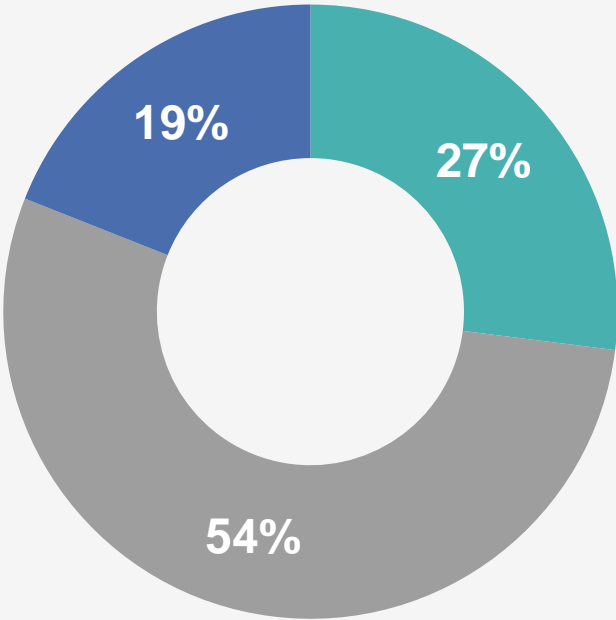
Online Sentiment Towards Travel Touchpoints

Positive Neutral Negative

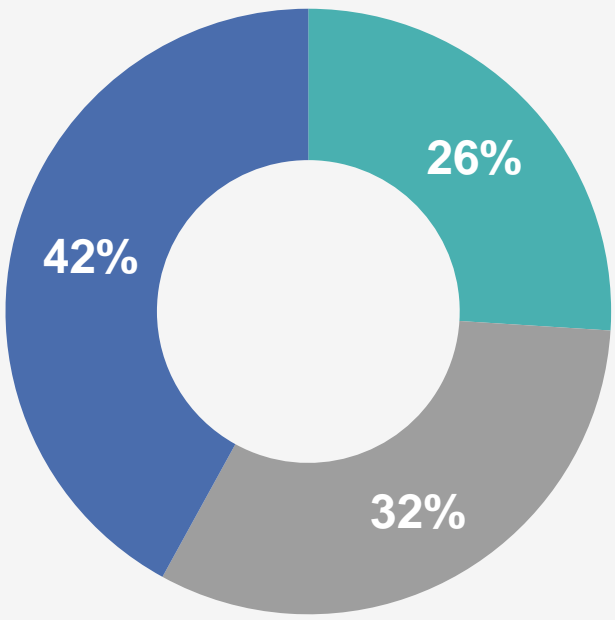
Airports



Airlines



Accommodation



People Are Still Not Aware Of Travel Procedures At The Airport

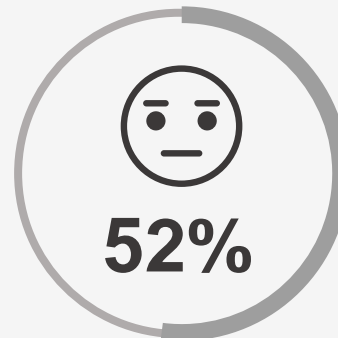
Drivers Of Airport Sentiment



People are **praising airports** for having risen to the challenge during Covid-19 by quickly **implementing systems and precautionary measures** to decrease the spread of the virus.

Some of the measures highlighted include forced social distancing, regular sterilization of terminals, providing hand sanitizers, gloves and masks to travelers as well as health checks and thermal camera scans across the airport.

People also **praised the medical teams** at airports for their dedication and hard work in keeping travelers and the country safe.



Residents were continuously wondering about **the status of airports**, particularly regarding the resumption of international travel. They want to travel again and were worried that summer was coming to an end without having gone on a vacation abroad.

Moreover, many travelers are **unaware of the new guidelines**, and some travelers are asking about the **overall travel procedures** during the pandemic, the required amount of time they now need to be at the airport before their flight, as well as which terminals are operating.



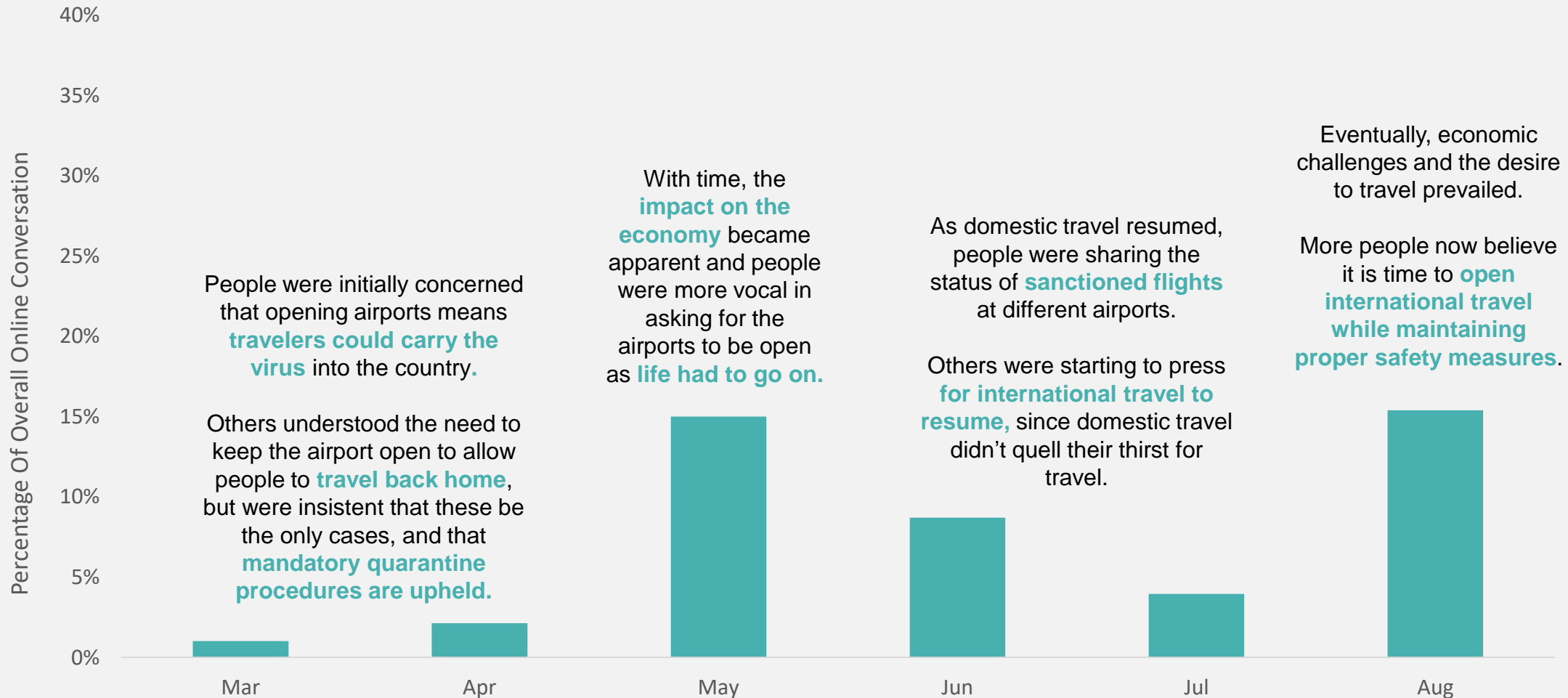
The main drivers of negative sentiment for airports come from the lack of proper implementation of **Covid-19 safety measures** and the **level of traffic** at airports.

The fact that **only symptomatic passengers** are being **properly quarantined** is one of the key concerns.

Many are also worried about airports receiving **too many travelers** from **many destinations**, particularly high-risk ones, which means high interaction with potentially infected people.

Attitudes In Favor Of Reopening Airports Are On The Rise

Evolution Of Online Conversations About Airports



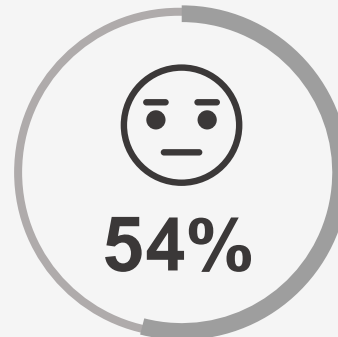
Airlines Are Seen As Unaccommodating And Unempathetic

Drivers Of Airline Sentiment



Travelers were looking back at their **past experiences**, sending shout outs to airlines that they frequently traveled with and expressing their **desire to board their planes** once more.

People also **complimented** the airlines for **continuing operations** and bringing citizens back home **despite the danger** that the virus poses to pilots and crew members.



With the **sudden flight cancelations** and **new guidelines**, many people found themselves unaware of the actions they should take to deal with situations they find themselves in.

Various people were **asking for information** about flight statuses, what steps they should take as flight plans change and whether refunds are available, seemingly unaware of where this information can be found.



With travel schedules and guidelines constantly shifting, people saw airlines as **slow to react** to the new circumstances and **unaccommodating**.

Airlines were **not flexible** in their bookings and **refused to give refunds** to people whose flights were cancelled, which was particularly upsetting to people given the **strain on people's finances**, and hence airlines were seen as unemphatic.

Many were also worried about **traveling in airplanes**, fearing that **crowding** will cause passengers to get infected should one passenger on a plane be carrying the virus.

High Rates, Low Standards Drive Negative Sentiment Towards Hotels

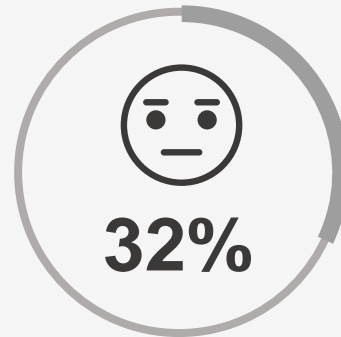
Drivers Of Accommodation Sentiment



Hotels were utilized as **quarantine locations** for travelers in a bid to contain the virus. Accordingly, the Saudi **government began placing locals in high quality hotels** and paying for their mandatory quarantine.

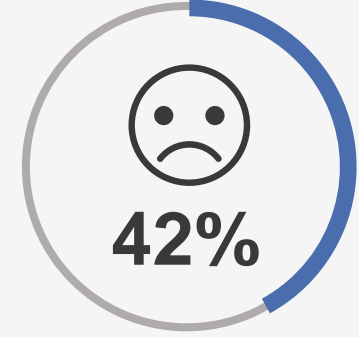
This was met with **high admiration** from people, who expressed their **gratitude** and pride in their country for stepping up and delivering a 5-star quarantine treatment compared to other countries.

Quarantined travelers also shared their **positive experiences** at hotels, with **food and dining** being the main element to which they would refer positively.



There was an increase in the number of people and travel bloggers **sharing promotions** or rates of hotels during the month of August. Some were also asking whether they knew any good hotels and travel promotions they could take advantage of.

Others mentioned **Airbnb** as a good option during this time and that it is a more flexible option since contact is **directly with the owners**.



Once domestic travel opened, travelers were vocal about their displeasure with their hotel experiences. The biggest issue they complained about was the **low level of cleanliness** of their rooms, especially during these times.

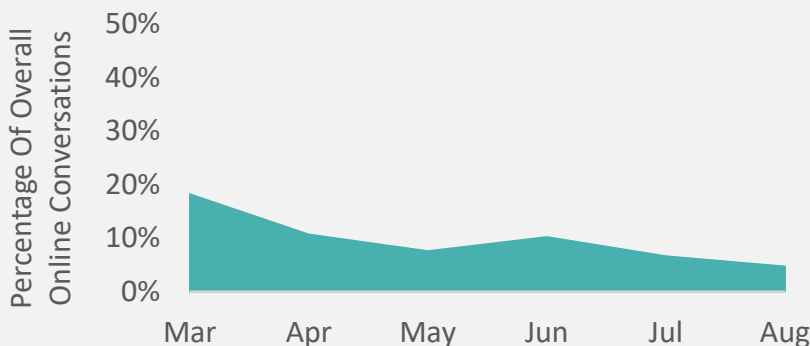
Some also mentioned that hotels are generally not the cleanest of places and were not comfortable staying at hotels just yet.

Those still considering travel also weighed in, mainly on the **hotel rates** which they perceived to be **illogically high**. Comparing the rates to hotels outside the country, many were quick to point out that the prices of domestic hotels were unreasonable.

Sentiment Towards Hotels Has Shifted Sharply As Travel Reopens

Evolution Of Online Conversations About Accommodation

■ Online Conversations On Quarantine in Hotels

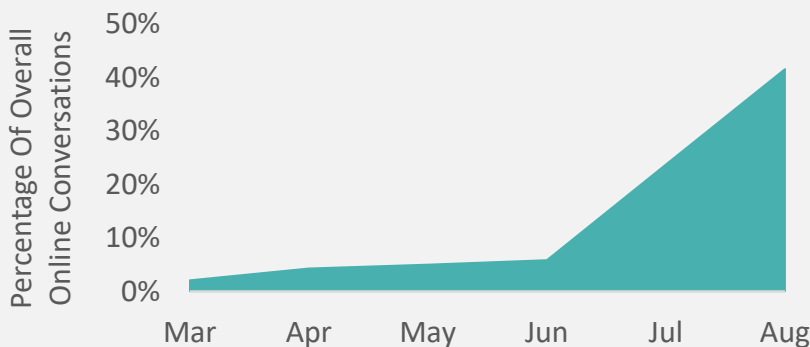


At the start of the pandemic, conversations about accommodation revolved primarily around **hotel quarantines**, as those returning home started sharing their experiences.

The sentiment was **initially very positive**, with most agreeing that **quarantine was necessary** and were **grateful to the government** for bearing the cost and placing incoming travelers in five-star hotels.

People also felt positively about the **food quality** on offer, with many images shared from actual experiences further validating to the general public that people in quarantine were generally well treated.

■ Online Conversations On Hotel Industry Standards



The **sentiment started shifting** once domestic travelers started sharing their regular travel experiences that are **not quarantine related**. Many were complaining about the **low levels of cleanliness** at the hotels in which they stayed, believing that during a pandemic the industry needed to do better.

Moreover, **high prices** caused a major backlash with the industry perceived as being exploitative at a time when it needs to play its part in encouraging people to travel domestically and support the recovery process.



Factors Encouraging Travel

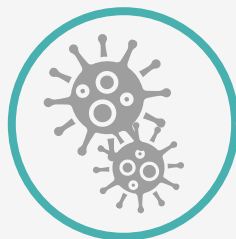


Improved Health Situation & Good Promotions Will Encourage Travel

Factors That Would Encourage Future Travel

61%

Improved Covid-19 Situation



36%

Convenient Travel Experience



16%

Stricter Covid-19 Safety Measures



61%

Attractive Financial Promotions



29%

More Destination Options

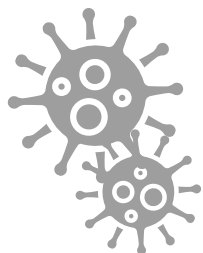


15%

Nothing



Financials Are Just As Important As Feeling Safe During Travel



61%

Improved Covid-19 Situation

Covid-19 is a main concern among travelers and as such, many still don't feel safe traveling. People worry about the **traffic across the different travel touchpoints** and the level of safety measures in place throughout the travel journey, not just in Saudi Arabia, but across the globe. Many would rather wait for a vaccine or a visible slowdown of the virus globally.



33% Availability of Covid-19 vaccine



25% Health authorities declaring travel safe



23% Slowdown of Covid-19 worldwide



61%

Attractive Financial Promotions

With many feeling the economic impact of the pandemic, finding attractive travel packages became an important factor in encouraging travel. While hotels were being criticized for their high prices, airlines were being criticized for not employing refund policies, and accordingly, both sectors were being asked to sympathize with people's financial situation.



25% Cheaper prices



18% Good airline promotions



16% Free Covid-19 medical coverage by airlines



12% Attractive accommodation promotions



11% Flexible booking & return policies



Safe Destinations & Convenience When Returning Home Are Key



36%

Convenient Travel Experience

There were plenty of conversations about **people getting stuck in another country and trying to go back home** ever since the airports closed, contributing to this being a major concern for some who feel that there is no guarantee a repeat of such a scenario will not happen. People also do not want to worry about quarantine upon return given the impact this will have on their daily lives.



33% Going home even if borders close



25% No quarantine upon return



29%

More Destination Options

While some travelers don't care which destination they fly to as long as they get to travel, some do have **specific destinations** in mind and would rather only visit these once **travel restrictions have been lifted**. Others are only interested in visiting destinations that are still **not attracting large crowds**.



21% Lifting travel restrictions to destinations



9% Low traffic in destination





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GAME CHANGERS

