

DECODING THE SAUDI ARABIAN TRAVEL AND TOURISM INDUSTRY

Understanding inbound, outbound,
and domestic travel trends

Presented by

Skift.

+



سيرا
SEERA

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ABOUT SKIFT

Skift is the largest industry intelligence platform providing media, insights, and marketing to key sectors of travel. Skift deciphers and defines trends for global leaders and executives across travel and wellness sectors through a combination of news, research, conferences, and marketing services.

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EXECUTIVE LETTER

LET'S TRAVEL FURTHER, TOGETHER.

The past 40 years have been a remarkable and memorable journey for our group – a journey that has led us to forge new pathways and always challenge ourselves to go further. Following our transformation from Al Tayyar Travel Group to Seera, we are driven by the purpose of opening up opportunities for travel by connecting cultures.

We now stand on the cusp of a momentous time, which is leading us and the nation of Saudi Arabia towards a future brimming with great potential. With the focus of Saudi Vision 2030 to unlock the true potential of the Kingdom's tourism industry by promoting both inbound and outbound travel services, Saudi Arabia is positioned to be one of the world's leading tourism destinations.

We are challenging ourselves to serve as a bridge between cultures, the common ground that brings strangers together, to connect and broaden minds and to empower people to travel in the Kingdom and across the world like never before. This is enabled by the technology platform we have developed that helps power our portfolio of brands. In addition, Seera has a central sourcing team and a dedicated data unit – helping the group to better understand and serve our customers.

Our strength lies in our experience and the reputation we have garnered over the years. We pride ourselves in the fact that we are not only the most knowledgeable and accomplished travel and tourism company in the region, but we have the advantage of a diverse collection of imaginative individuals who operate under one group brand, whose primary purpose is to enrich every stay, every journey, every trip.



Abdullah AlDawood,
CEO of Seera Group

We are pleased to publish this report, in partnership with SkiftX, which gives unique and fresh insights into the travel and tourism sector of Saudi Arabia.

Join us as we set off on our new journey to open up our Kingdom, connect cultures, and inspire travelers to experience all the possibilities that await.



تخيل أين يمكن أن تحملنا
أجنحة السفر.

Imagine where travel
could take us.



سيرا
SEERA

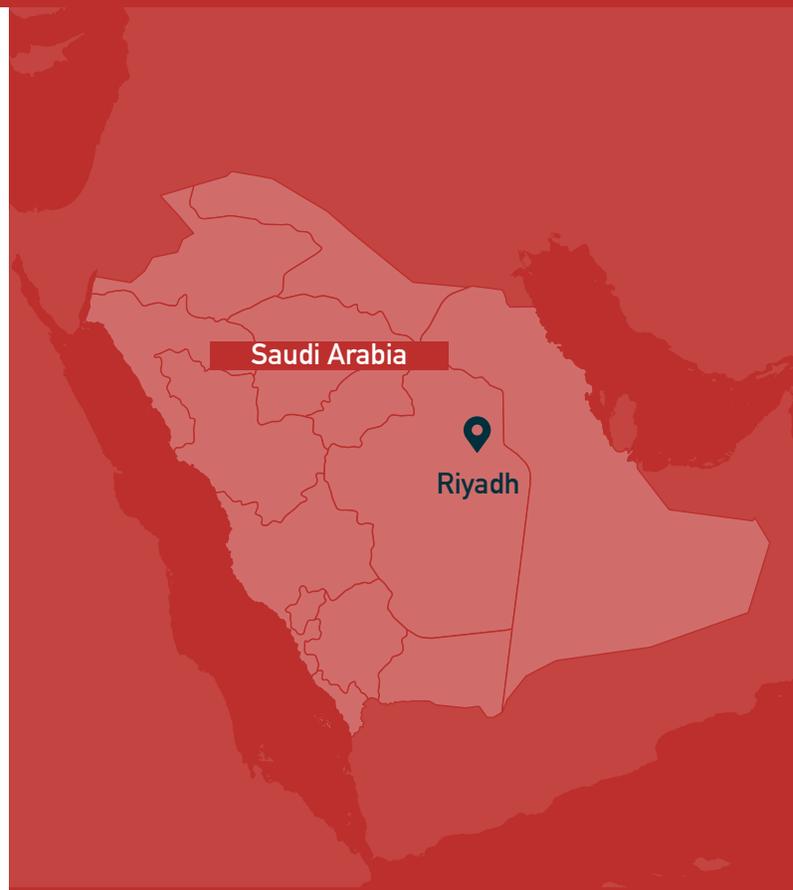
INTRODUCTION

High-spending, frequently-traveling Saudi Arabians make the Kingdom of Saudi Arabia one of the most attractive markets for global travel brands. In April 2016, His Royal Highness Crown Prince Mohammad bin Salman Al Saud of Saudi Arabia, announced [Vision 2030](#), a manifesto outlining the Kingdom's plan for social, economic, and cultural development in the coming years. One of the key tenets of the Vision 2030 is to achieve economic diversity, and tourism can be a key facilitator of that tenet. The Kingdom is taking many steps to grow its tourism economy - including issuing tourist visas in 2019 for the first time in decades. Today, Saudi Arabia's travel industry is at the cusp of transformation.

This is not the first time a Middle Eastern country has transformed or attempted to transform its economy via a comprehensive plan such as this. The United Arab Emirates (UAE) launched UAE Vision 2021 in 2010, and Bahrain launched its Economic Vision 2030 in 2008.

"There are specific times when destinations accelerate growth and do something spectacular," said Ross McAuley, vice president of marketing for Seera Group. "Think about Manhattan in the early 1900s, Berlin's transformation in the '90s, and Dubai's in the 2000s. That time is now for Saudi Arabia – to experience and drive unprecedented economic and social change. And travel and tourism, to me, is both a key driver and beneficiary of that change."

This report, created in partnership with Seera Group, the leading Saudi Arabia-based travel industry conglomerate, aims to understand the current state and future potential of the Saudi Arabian travel industry and the Saudi traveler.



Total Population:

34,218,169

Saudi Nationals:

20.7 million

Median Age:

29.9 years

Capital:

Riyadh

Source: Saudi Arabia goverment and CNN

TRAVEL AND TOURISM IN SAUDI ARABIA BY THE NUMBERS

According to data from the World Travel and Tourism Council (WTTC), tourism has been growing in Saudi Arabia in the last decade, though there has been year-on-year fluctuations. Here are some key findings from evaluating changes in spend. We looked at “real prices,” which adjusts the actual spend amounts to take inflation or deflation over time into account.

1. Travel and Tourism’s total contribution to Saudi Arabia’s Gross Domestic Product (GDP) grew by 4.64 percent (which amounts to approximately \$2.89 billion) between 2009 and 2018 and was at \$65.21 billion in 2018.

+4.64%

Gross Domestic Product

2. Domestic tourism spending (spending by Saudi Arabia’s residents on business and leisure trips within the country) grew by 1.56 percent (which amounts to approximately \$262 million) between 2009 and 2018 and was at \$17 billion in 2018.

+1.56%

Domestic Tourism Spending

3. Leisure tourism spending (spending by Saudi Arabia’s residents and internationals on leisure trips within the country) grew by 12.55 percent (which amounts to approximately \$2.9 billion) between 2009 and 2018 and was at \$26.4 billion in 2018.

+12.55%

Leisure Tourism Spending

4. Business tourism spending (spending on business travel by residents and international visitors within Saudi Arabia) grew by 35.8 percent (which amounts to approximately \$1.2 billion) between 2009 and 2018 and was at \$4.5 billion in 2018.

+35.8%

Business Tourism Spending

5. Visitor exports or foreign spending (spending by international tourists in Saudi Arabia) grew by 38.4 percent (which amounts to approximately \$3.8 billion) between 2009 and 2018 and was at \$14.04 billion in 2018.

+38.4%

Visitor or Foreign Spending

To provide some additional context from WTTC, no other country except the UAE is attracting the same level of spending in that region. Foreign spending was at \$0.75 billion in Kuwait, \$3.1 billion in Oman, and \$12.96 billion in Qatar in 2018. WTTC also reports that domestic tourism spending in 2018 was at \$5.39 billion in Kuwait, \$2.38 billion in Oman, and \$2.42 billion in Qatar. “The outbound travel market from Saudi Arabia has always been lucrative, but we are seeing growth in domestic and inbound travel as well,” McAuley said.

SAUDI ARABIA'S GOALS FOR GROWING ITS TOURISM ECONOMY

Vision 2030 impacts the Saudi Arabian tourism and travel industry in several direct and indirect ways. Saudi Arabia has also set forth tourism goals outside of the Vision 2030 manifesto. Some of the goals outlined in Vision 2030 and by the Saudi Commission for Tourism & National Heritage that can potentially drive growth in travel and tourism are:

1. Increase Saudi Arabia's capacity to welcome Umrah visitors from 8 million in 2015 to 30 million every year by 2030. Umrah is a year-round pilgrimage made by Muslim travelers to the holy cities of Makkah and Madinah.
2. More than double the number of Saudi heritage sites registered with the United Nations Educational, Scientific, and Cultural Organization (UNESCO); Saudi Arabia currently has four cultural sites registered with UNESCO.
3. Build the largest Islamic museum in the world with a library and research center.
4. Increase household spending on cultural and entertainment activities inside the Kingdom from the current level of 2.9 percent to six percent.
5. Achieve 100 million international and domestic overnight visits a year by 2030.
6. Increase tourism's contribution to the country's GDP by 10 percent by 2030.
7. Improve visa issuance procedures for visitors.
8. Move from its current position as the 19th largest economy in the world into the top 15.
9. Increase foreign direct investment from 3.8 percent to 5.7 percent of GDP.
10. Increase non-oil government revenue from \$43.45 billion to \$266.6 billion.

While the first seven goals above have a direct impact on growing travel and tourism in the country, the other goals impact the industry a little more subtly. An increase in opportunities for companies outside of Saudi Arabia to invest directly in the country could grow inbound international business travel, for example. Investment in infrastructure would also make it easier for visitors to travel within the Kingdom.

As part of executing on the promises of Vision 2030, the Saudi Arabian General Investment Authority (SAGIA) and the Saudi Commission for Tourism and National Heritage (SCTH) have signed several memoranda of understandings (MoUs) and agreements with regional and international investors for around \$26.67 billion. Out of that, Seera Group has committed to investing SAR 1 billion in improving Saudi's tourism and human capital infrastructure and promoting Saudi Arabia as a destination around the world.

Riyadh, Saudi Arabia



CHALLENGES TO OVERCOME



Madai'n Saleh, Saudi Arabia

Like any other nation looking to pave a new path, Saudi Arabia has several challenges to overcome. Depending on which sector you look at within the travel industry, there are nuances to these challenges. However, for the purpose of this report, we have bucketed these challenges under two main themes: perception and infrastructure.

Perception: Saudi Arabia's perception in the global community has many geopolitical and social associations. Whether in reference to concerns raised by the United Nations and international media about human rights violations, women's rights restrictions, or the nation's general intolerance of anything that does not align with its "value system," Saudi Arabia has a lot to counter.

However, hospitality professionals inside Saudi Arabia are confident about the positive impact of the changes that have been implemented in the last few years and the additional changes that have been announced. "There is a lot of buzz about Saudi Arabia around relaxing some of its rules and restrictions, and living here, we can see things changing to open the country for more tourism," said Kamran Khan, managing director at AIM Restaurant Consultancy and Marketing. "A lot has actually been done in recent times that shows the leadership's commitment to growing the travel and tourism economy in Saudi Arabia."

In the last few years, the government of Saudi Arabia has curbed the powers of the religious police in the country, allowed women to drive for the first time in decades, relaxed male guardianship laws to allow

women to travel without a male's permission, allowed women spectators in sports stadiums, announced that unmarried couples visiting the Kingdom can now rent rooms, made wearing abaya optional, and eased up segregation laws around special events. Saudi Arabia also hired New York-based public relations and communications firm Karv Communications in February 2019 to help rebuild its image on the world stage.

Infrastructure: While main population hubs such as Jeddah, Riyadh, and Dammam in Saudi Arabia are well-connected, and infrastructure improvements continue in the holy cities of Makkah and Madinah, other parts of Saudi Arabia do not have the necessary infrastructure to support tourists.

"One of the largest barriers to [growing travel and tourism] is that infrastructure on the ground is completely new and limited," according to Oliver Martin, partner at Twenty31 Consulting Inc., a destination development and sustainability strategist. The average Saudi likely only speaks Arabic, and communicating effectively with international consumers can become a bit of a challenge as Saudi looks to attract more non-religious travelers."

As outlined in the Vision 2030 document, the promise of increasing investment to improve infrastructure in the cities, cultivate historic sites, and open up the nation to foreign direct investment could stimulate

diversification and a better tourism infrastructure in the short and long term.

But investment in infrastructure in Saudi Arabia must go beyond the nation's physical infrastructure to include human capital as well. In October 2019, the United Nations World Trade Organization (UNWTO) Academy was inaugurated in Riyadh to introduce participants of this 4-day course to the latest trends in cultural and heritage tourism. "Investment in human resources for the travel and tourism industry in Saudi Arabia must expand to not just have more trained people but to also have people with diverse skills," McAuley said. "Saudi Arabia currently has more ticketing agents than travel advisors and making sure that more Saudis are trained for jobs in hospitality, travel, and tourism is a good thing."

Qiddiya, an entertainment, sports, and cultural destination, is being built 40 kilometers outside Riyadh. Saudi Arabia General Entertainment Authority (GEA) and Qiddiya Investment Company (QIC) instituted a scholarship program in early July 2019 to provide scholarships for 60 students from Saudi Arabia to study at Rosen College of Hospitality Management at the University of Central Florida in the United States. A [memorandum of understanding was also signed](#) to include internships at Six Flags theme park for these students, paving the way for them to get jobs at Qiddiya.

Red Sea, Saudi Arabia



THE WAY FORWARD

While those challenges are hurdles for the Saudi Arabian government to overcome, officials from Seera Group are extremely positive about future prospects. “Like for the United Arab Emirates in the early 2000s, this is Saudi Arabia’s starting point,” McAuley said. “If you think about Dubai, look at the photos from the late ’90s – it did not exist in the form it does today. Even Singapore has transformed immensely. There is a track record of such transformations from other nations – embracing change, modernizing, and opening up the market – that do defy expectations, and Saudi Arabia is on a similar path.”

As Saudi Arabia turns to travel and tourism, the government’s approach has been to set up individual strategic units to advance different parts of the Vision 2030 plan. “If you’re moving at the speed that the Saudi government wants to move at, you have to drive this from and into the upper layers of the government to make sure that things happen quickly,” McAuley added. “So the strategy is set up to have the Public Investment Fund (PIF) and top government officials heavily involved and to develop entities whose sole task is to deliver on the promise and metrics of Vision 2030.” The PIF is a sovereign wealth fund owned by the government of Saudi Arabia.

The country is also making headway in offering diverse payment methods to travelers. Secure contactless and cashless payment methods are prerequisites to sustain the growing number of online travel transactions, and to make it easier for international inbound and domestic travelers. Visa has partnered with mada, the Saudi payment network, to launch its first digital wallet, mada Pay, which uses Visa’s tokenization technology to secure transactions by replacing the 16-digit card number with a token. During a transaction, the token – not the actual card information – is selected and submitted into the payment process.

Aside from investments and legal changes necessary to transform Saudi Arabia, the statement that has perhaps inspired the most confidence in the country’s future as a tourist destination was Prince Mohammed’s statement that Saudi Arabia would return to a more “moderate Islam.” During a public appearance at an investor conference in Riyadh, the prince said, “We only want to go back to what we were: moderate Islam that is open to the world, open to all religions. We will not waste 30 years of our lives in dealing with extremist ideas. We will destroy them today.”

Research done by Colliers on behalf of the Arab Travel Market, a travel and tourism event held every year in the Middle East, projected domestic trips to increase by eight percent in 2019 and inbound visits from international markets to grow by 5.6 percent per year. “Domestic tourism across Saudi Arabia has witnessed a significant increase over the past year, presenting enhanced business opportunities for the hospitality industry,” said Pascal Gauvin, managing director for India, Middle East & Africa at InterContinental Hotels Group (IHG). “We predict that this trend will continue for many years. This surge has also resulted in a gap between the demand for, and supply of, quality, internationally branded accommodations targeting specific guest segments.” IHG currently has 14 new properties being developed and is debuting one new brand, voco, in Saudi Arabia.

However, the international community of travelers and investors remains cautiously optimistic and would need better knowledge of local norms, culture, and practices to conduct business in Saudi Arabia. While the laws institutionalize some of the changes the Crown Prince wants to bring about, the realities on the ground will take longer to change.

Saudi Opens Up Its Borders for Tourists with Simplified Visa Processes

Perhaps the most significant move to open up Saudi Arabia to tourists and execute on promises made in Vision 2030, the Saudi Commission for Tourism and Heritage's announced that anyone seeking to travel to Saudi Arabia can now apply for a tourist visa online or via a Saudi Consulate or Embassy in September, 2019. Before this, travelers could visit Saudi Arabia only under the following umbrellas - Hajj and Umrah travel, business travel, or to visit family and friends.

Citizens from Bahrain, Kuwait, Oman, and United Arab Emirates do not need a visa to travel. But with e-visas and visa on arrival available to citizens of 49 countries, traveling to the Kingdom as a tourist just became easier.

The strategy for targeting tourists and travelers is to entice first-time visitors to "discover Saudi" from 2019 to 2022. The extension of that strategy from 2022 would be to encourage tourists to "experience Saudi".

U.S.A	Iceland
Canada	Latvia
Kazakhstan	Luxembourg
Singapore	Montenegro
South Korea	Portugal
Belgium	San Marino
Cyprus	New Zealand
Estonia	Spain
Germany	Austria
Italy	Croatia
Lithuania	Denmark
Monaco	France
Poland	Holland
Russia	Ireland
Slovenia	Liechtenstein
Switzerland	Malta
Australia	Norway
Bulgaria	Romania
Czech Republic	Slovakia
Finland	Sweden
Greece	Ukraine
China (Hong Kong, Mcau, Taiwan)	



Existing and Upcoming Projects to Improve the Tourism Infrastructure

Seera Group's hospitality division currently has 1,880 hotel rooms, and they plan to expand to 6,000 rooms by 2022. Seera Group has largely mid-market hotels in its portfolio, though two of its properties are luxury properties. Its intention is to continue to build hotels that cater to the demands of domestic travelers, business travelers, and pilgrims traveling to or within the country. It has partnered with Choice Hotels, and is currently developing seven hotels in Riyadh, Jeddah, and Al-Taif.

One of the largest tourism undertakings is happening in the Red Sea, where a new project development spans 90 untouched islands and 28,000 square kilometers of land and sea. The project is tapping into the undiscovered natural beauty of the region, and targets visitors from both within the Kingdom

and across the world. "The demand for luxury travel is growing rapidly, but what makes this project so special and unique is that it has sustainability at its heart, giving visitors the satisfaction of knowing that they can take advantage of a luxury experience while preserving the natural beauty of the local area for future generations," said John Pagano, CEO at The Red Sea Development Company.

Other ongoing national projects, most of which are being fully or partially funded by the PIF include:

- Neom Valley Project to build a megacity in the desert by a water body.
- Qiddiya, an entertainment center, which will include a Six Flags branded theme park and hotels.
- Amaala, a wellness-focused resort with a dedicated airport, 2,500 luxury hotel rooms, 200 retail establishments, art galleries, marinas, and 700 villas.

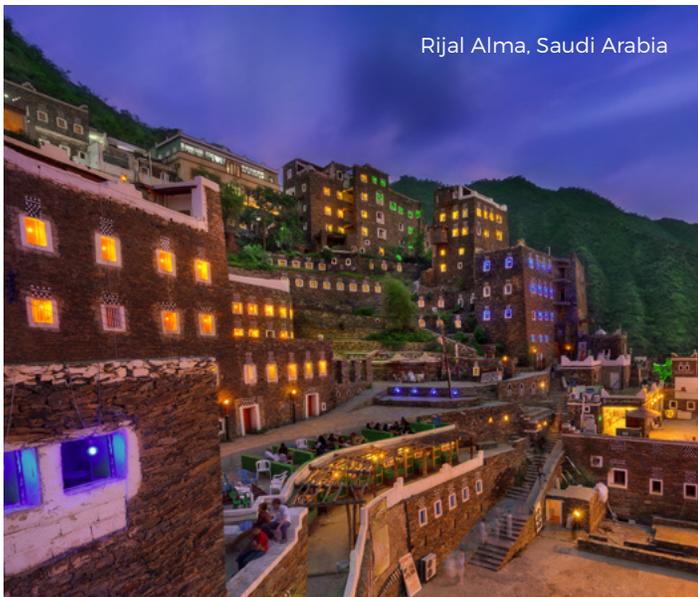
Jeddah beachresort, Saudi Arabia



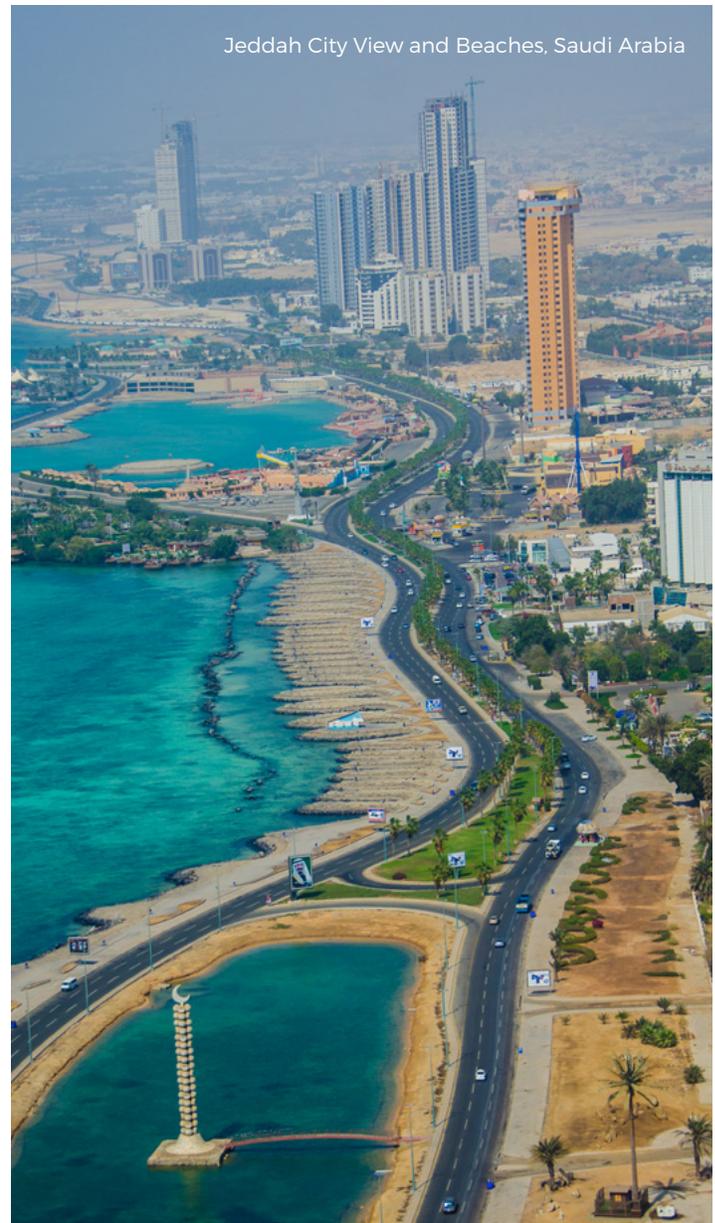
- Sharaan resort in AlUla, which will be designed by Jean Nouvel, who designed the Louvre Abu Dhabi, and will include luxury suites, a wellness spa, and an events venue.
- A third expansion of the Makkah Grand Mosque is underway to accommodate more Hajj and Umrah travelers.
- Saudi Entertainment Ventures (SEVEN) recently announced plans to open 50 new cinemas with a total of 450 screens by 2022. It plans to open seven cinemas in 2019 alone. It also [announced](#) plans to build 20 entertainment centers.

- Jeddah Tower and Jabal Omar, both of which are expected to include hospitality units.

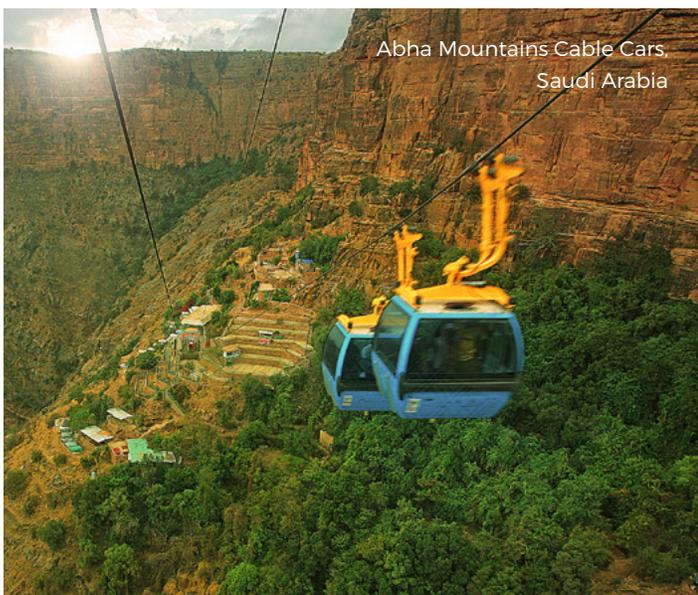
Another massive undertaking in Saudi Arabia is the plan for Aman Resorts to open three properties near AlUla. "True to the pioneering spirit of Aman, the three resorts will offer an incomparable insight into the Kingdom of Saudi Arabia and its magnificent unspoiled natural landscapes and archaeological sites, which have long remained undiscovered," the hotel group said [in a statement to Travel + Leisure](#).



Rijal Alma, Saudi Arabia



Jeddah City View and Beaches, Saudi Arabia



Abha Mountains Cable Cars,
Saudi Arabia

Using Entertainment and Cultural Activities to Increase Domestic and Inbound Travel

Another initiative as part of Vision 2030 is the establishment of the General Entertainment Authority (GEA), which helps organize and develop the entertainment sector to provide more activities for domestic and international travelers.

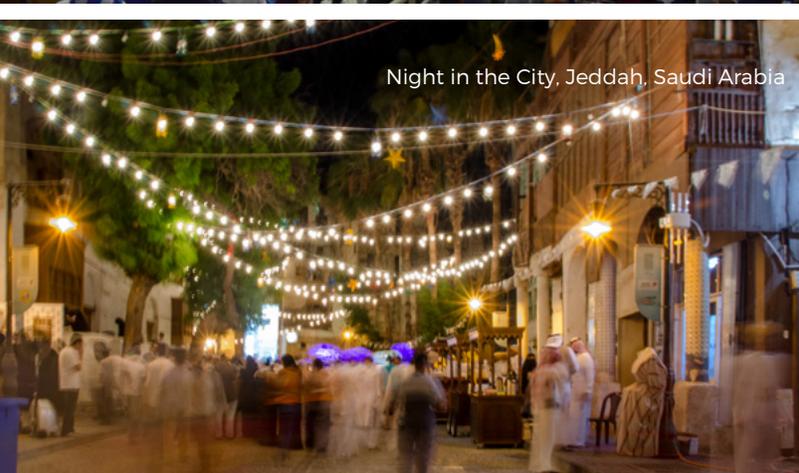
The Saudi Seasons were established as part of this effort and involve a calendar of events, including concerts, local engagements, cultural and religious events, circuses, theatrical performances, and more over a period of time in popular destinations. For example, the Jeddah Season, hosted in June and July 2019, included a performance of King Lear, a number of circuses, and a music festival featuring international performers such as Janet Jackson, Future, 50 Cent, Chris Brown, and Tyga. Men and women were not segregated in the festival venue, another first for the Kingdom.

The Saudi Seasons facilitated an increase in inbound and domestic travel. The Taif Season, for example, saw more than 2.5 million visitors from within the Kingdom and abroad.

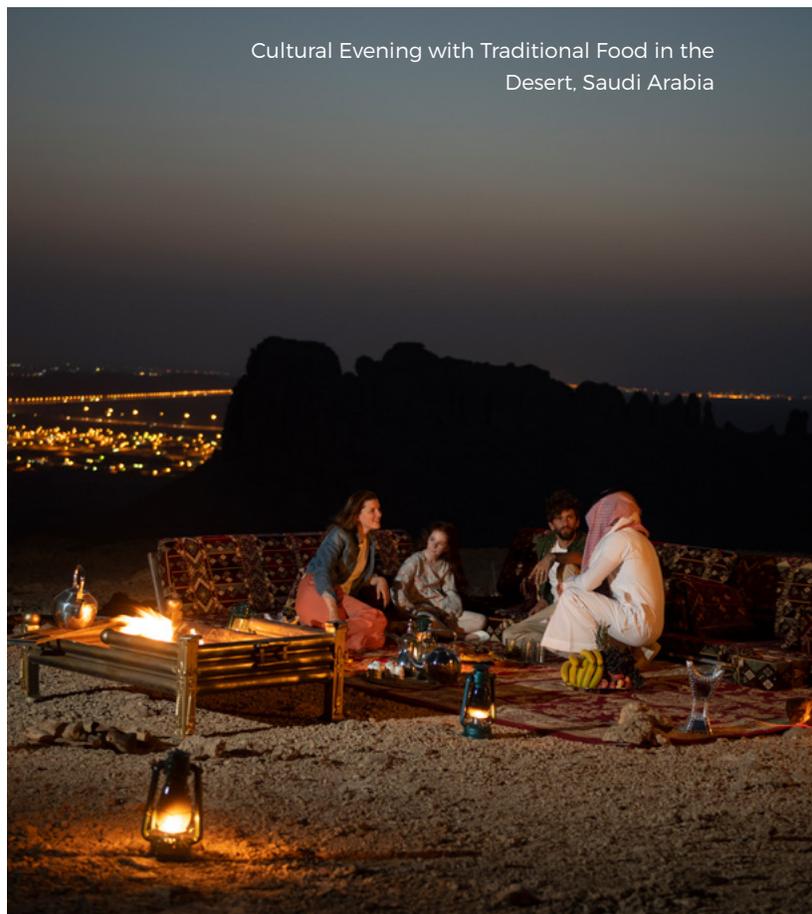
One of the major events on the Saudi Arabian tourism calendar for 2019-2020 is Winter at Tantora, Season Two, with events scheduled from December 19, 2019, to March 7, 2020. During Season One in 2018, the festival welcomed 37,000 visitors over a period of ten weeks. Season Two offers a 500-seat concert hall, luxury villas, ballet shows, opera, orchestra, a two-week balloon festival, and the world's second largest endurance race. This season will last 12 weeks. Visitors can explore the region of AlUla with activities such as hiking, volcano treks, airship flight tours, vintage tours, and Red Sea discovery tours. Pop-up luxury resorts with expansive villas are currently under construction, and the visa application process surrounding the event has been simplified. The event is expected to have 10,000 weekend guests (who spend the night there) and 30,000 guests to public events.



Jeddah Football Stadium, Saudi Arabia



Night in the City, Jeddah, Saudi Arabia



Cultural Evening with Traditional Food in the Desert, Saudi Arabia



SEERA GROUP APPOINTED AS THE DESTINATION MANAGEMENT COMPANY PARTNER FOR 'WINTER AT TANTORA'

The Royal Commission for AlUla announced that Seera Group has been appointed as the key Destination Management Company (DMC) for the event. Seera Group, with its many business units, will be responsible for creating and marketing various travel products that will help visitors to the festival have everything taken care of – from ticketing to on-site experiences. It will also be responsible for driving awareness for the event.

“Choosing Seera as a DMC for the event underlines our competencies in offering tailored solutions for international and Saudi-based visitors – covering all aspects of their journey,” said Abdullah AlDawood, CEO of Seera Group. “In addition to working with our global offices and affiliates, we will promote and sell travel packages for the festival across Seera’s extensive online and offline network.”

“

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Abdullah AlDawood,
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SAUDI ARABIAN TRAVELER BEHAVIOR AND PREFERENCES



Most Saudi Arabians take multiple trips a year. “Due to the way holidays are structured in the country, most of them not only get to take at least one long annual leave but also several short trips during weekends or religious holidays,” said Fahad Al Obailan, vice president of retail at Seera’s consumer travel business unit.

Based on monthly surveys conducted by Seera Group of 300 residents of Saudi Arabia, Almosafer (Seera Group’s flagship consumer travel brand)

ranks the highest when it comes to unaided recall of travel brands as of August 2019. “The one thing we’ve recognized about our Saudi customers is that they really love and remain fiercely loyal to a local brand like Almosafer or Saudia. There is an emphatic preference for brands made for Saudis by Saudis,” Obailan said.

The Four Segments of Saudi Arabian Leisure Travelers

Under the larger umbrella of its Consumer Travel Business Unit, Seera Group conducted extensive research that included field surveys, observation of the Almosafer call center and store employees, focus groups, a consumer panel, observation of the booking process, and more. At the end of this research, Seera classified Saudi travelers into four primary segments:

- Family Travelers:** Saudi Arabians like to take at least one trip every year as a family, if not more. Often, family travel includes not only one's nuclear family but is rather more multi-generational, including grandparents, cousins, and siblings. Though bookings are often made for each of these family units separately, they all meet at the destination and stay together. Having a common area to socialize, spend time together, and host friends and family is an important consideration. The presence of adjoining rooms and/or connected suites often becomes a deciding factor in what kind of accommodations these travelers book. They also want to have easy access to different activities for different generations based on their interests, as well as lots of activities for the children.
- Take-it-Easy Travelers:** This segment of travelers is younger, and though they are more likely to visit a new destination than the family travel group, they are still largely looking for a place where they can go to relax and be comfortable. Beach resorts, for example, are very popular with this segment.
- Grown-up Explorers:** Similar to the previous segment, these groups are young, but they differ in what they want to get out of their trip. They are looking for adventure, an experience they've never had before, something different, and something unique.
- Honeymooners:** Honeymooners in Saudi Arabia present a specialized kind of need because often this is the first time the couple is traveling together. There is a lot of trepidation involved, and the need for reassurance, security, and comfort is extremely high among this group. They want to know that everything will be taken care of and arranged before they arrive.

"With the change in the law in August 2019 that now allows women to travel without being accompanied by a male relative and to get travel documents such as passports without permission from a male guardian, women traveling in groups and by themselves is also expected to rise," said Fatimah AlJarboua, communication specialist at Seera Group "This is sure to open up a new segment of travelers that Saudi and international travel brands can look to attract."



INTERNATIONAL OUTBOUND LEISURE TRAVEL PREFERENCES AND HABITS

Saudi Arabian travelers, just like most travelers around the world, are inspired by trends, but the key drivers for most of their travel-related choices are safety and cultural alignment. The current median age in Saudi Arabia is approximately 29.9 years, and wanderlust for new experiences and a desire to explore are strong.

Top Travel Priorities



Safety



Access to prayer rooms and/or mosques



Comfortably adhere to their cultural norms



Access to halal food



New experiences

“Like the rest of the world, people from the Middle East love to travel, and that holds especially true for people from Saudi Arabia,” said Ronnie Varghese, senior director of online and omnichannel programs for Seera Group’s consumer travel business unit. “But, what is unique about Saudi leisure travelers is that they travel much more frequently and spend more per trip by a significant margin.”

Varghese’s insight is supported by the findings of the Middle East Consumer Travel Report published in March 2018 by Amadeus, tajawal (part of Seera Group), and Jumeirah. This research looks at travelers from Egypt and the Gulf Cooperation Council (GCC) countries, a regional intergovernmental political and economic union comprising Saudi Arabia, Kuwait, the United Arab Emirates, Qatar, Bahrain, and Oman. According to the report, 31 percent of respondents travel at least once a year, 25 percent travel twice a year, and 44 percent of respondents travel three times or more in a year.

Saudi Arabians Travel Frequently for Leisure.



Source: Consumer Travel Report, Amadeus, tajawal, and Jumeirah, March 2018.

Selecting a Destination

“The state of leisure travel in Saudi Arabia is actually very exciting,” said Muzzammil Ahussain, executive vice president of consumer travel for Seera Group. “And that’s mainly because of two things. First, just like the rest of the world, people are exploring more and more. They are trying new destinations like Baku, Tbilisi, Kuala Lumpur, and Dubrovnik. And the second thing is that cities Saudis commonly frequent, like London and Dubai, continue to remain strong as people enjoy the comfort and familiarity these places provide. They enjoy these trips, and they keep going back.”

Countries such as South Africa are also recognizing the value of the Saudi traveler. As of August 2019, Saudi Arabians and UAE nationals no longer need a visa to travel to South Africa for 90 days or less for leisure or business. Georgia made a similar move in November 2016. The United Kingdom remains a top

destination for Saudi Arabians to visit. According to numbers [reported by Visit Britain](#) in 2018, Saudis made 166,250 visits to the UK, with an average stay of 16.29 nights and an average spend of \$3,109 per stay.

“The most important things to a Saudi traveler are trust, safety, and security,” Ahussain said. “And we attempt to ensure that we provide as much of that as possible. We have direct contracts with some hotels and hotel chains such as Marriott, IHG, and Accor,

All-Time Favorites:

London, Dubai, Paris, Cairo, Sharm El-Sheikh, Maldives, Beirut, Abu Dhabi, Bali, and Geneva

Currently Trending:

Baku, Tbilisi, Kuala Lumpur, Dubrovnik, Jakarta, Seychelles, and Singapore

Dubrovnik, Croatia



and we work with Global Distribution Systems (GDSs) to make sure that we are able to provide as many options and as much information as possible to the booker via our platforms.”

It is also this search for trust, safety, and security that makes domestic travel, travel to destinations within the GCC, and repeat visits to familiar places outside of the GCC very appealing to Saudi travelers. “When it comes to the kind of destinations travelers select, it is very cyclical,” said Rob Arrow, product development director at Seera Group. “When they are young and they travel as part of a larger family, they visit the familiar spots. They grow up, they begin to travel with friends, and they are looking for adventure. They seek out new and exciting places to go to. After that, they settle down, get married, have kids, and it’s back to the familiar places for them.”

The kind of accommodation Saudi travelers will have access to at their destination also often plays into the selection process. According to the Ipsos, Spotlight KSA: Saudi Arabia Travelers Report, published in November 2018, 69 percent prefer alternate accommodations such as apartments and home rentals over hotels. “Saudi Arabians, often when traveling as a family, plan visits with other family

members and friends. Being extremely family and community oriented, this kind of trip makes up a large portion of the bookings we see. And when they travel, they are not only looking to spend time with their family and friends but also to host family and friends as they would at home,” Varghese said.

Beach holidays are popular among Saudi Arabians, and Maldives and Mauritius are very popular. While Maldives offers the familiarity of being in an Islamic country, Mauritius offers private beach experiences. “Saudi Arabian travelers are still fairly conservative, and they want privacy to be able to truly enjoy the destination without compromising their cultural and religious preferences. Villas in beach resorts with private pools and exclusive beach access offer exactly what many families are looking for,” Arrow noted.

Almosafer data also shows Azerbaijan to be one of the rising stars on the top destination list. “It ultimately comes down to their willingness to explore. Places that seemed alien before – as long as they have a unique experience or a beautiful beach to offer – don’t seem as alien to this new generation of Saudi travelers anymore,” Arrow said.

Tower Bridge, London, United Kingdom



Influencing the Decision Makers

Initial research done by Seera Group showed that men were making most of the travel bookings. However, on further evaluation of the user experience and the user journey, Seera Group found that the actual decisions were being made by the women while men were doing the final booking and providing the final validation.

When it comes to finding inspiration on where to travel, Saudi Arabians rely on three sources: friends and family, social media, and pop culture. While analyzing user behavior by traveler segments Seera Group discovered that when choosing to travel to a place for the first time, or when the recommendation was not made by a family or a friend, bookers will often look for online reviews left by other Saudis to help make up their mind. While 44 percent look to family and friends for travel information, 39 percent visit travel websites to find what's new, according to the Middle East Consumer Travel Report 2018.

To cater to a new generation of Saudi travelers who want to visit new places, Almosafer has begun partnering with the tourism boards of the United Kingdom, Azerbaijan, Singapore, and other destinations to create written and/or video content about the destination to address the key things Saudi Arabians take into consideration while traveling. "What we've done in Indonesia, for example, is that we sent our film team to highlight a lot of unknown things about the destination," Ahussain said.

The younger generation, especially friends traveling in a group, looks to social media influencers and YouTube vloggers. "They look at what's trending on Instagram, Snapchat, and even YouTube to find their inspiration," Arrow said. Almosafer data also shows that cherry blossom festivals in Japan and Korea are becoming more popular among younger travelers.

Most Popular Sources of Travel Information



44% Friends and Family



39% Travel Websites



25% Travel Providers on Social Media



16% Vloggers and Bloggers

Outside social media, popular TV shows and movies are also influencing destination choices for couples and friends traveling internationally. Croatia became popular after the television show Game of Thrones was filmed there, Northern Ireland after Star Wars, New Zealand after Lord of the Rings, and so on. "Seera Group got customer feedback about creating and providing tours to popular destinations where local Arabic TV shows were shot as well," Arrow said.



61%

Saudi Arabians prefer to make reservations and travel bookings through a travel agent

Source: Ipsos



Booking Behavior

The Ipsos report found that 61 percent of Saudi Arabians prefer to make their reservations and travel plans with a travel agent, and 75 percent of them like to book individual pieces of the trip separately instead of buying a package. However, online booking is definitely on the rise. Seera Group's online travel agencies, Almosafer and tajawal, bear testimony to that. According to earnings data released in the second quarter of 2019, online consumer business grew by 70 percent over the last year.

On average, Saudi travelers book their international trips 26 days in advance, according to 2018 (January to August) data from Seera Group. During the same time period in 2019, 77 percent of international bookings were made in the window of 0 to 25 days.

As Almosafer grew, Seera research teams found that Saudi Arabians are comfortable buying only commoditized travel products online, such as a basic flight or hotel booking. However, when it comes to more complex bookings, such as trips with multiple stops, multi-family vacations, or holidays to new destinations, they need additional reassurances and prefer to go to a travel agent. As a result, Seera transformed Almosafer's approach to reaching the

Saudi traveler and developed a more omnichannel approach – call centers, online, and retail outlets.

Recognizing that there were parts of the trip Almosafer was losing out on helping the customer with was a huge first step in its new omnichannel strategy. Currently, Almosafer has four stores across Jeddah and Riyadh, but by the first quarter of 2020, it plans to open 50 stores around the country, with 25 expected to open by the end of 2019. When a customer reaches out, either via a retail store, call centre, website, or any combination of those channels, Almosafer is able to build a 360-degree view of the customer, recognize the customer, and offer a personalized experience across all touchpoints.

The decision of which avenue to use when making the booking often comes down to three things: accurate and relevant content, local payment methods, and translation to Arabic. "Many Saudi Arabians still use bank transfer or mada, the fastest growing debit payment network in Saudi Arabia, for larger purchases, and knowing if their hotel will accept their preferred method of payment or not is important," Varghese said.



SAUDI ARABIA

NEWS

SEERA FULFILLS ITS PROMISE TO INVEST IN HUMAN CAPITAL DEVELOPMENT WITH ALMOSAFER ACADEMY

“Almosafer Academy is an integral part of our retail transformation as we are immersing Saudi talent in intensive and specialized training that will give them the knowledge and skills to help customers make the right travel decisions,” Obailan said. “It is no longer simply about the booking but providing customers with the insight and inspiration to make the first part of the travel journey as exciting as the rest.”

Adding to Seera’s efforts to be more omnichannel and to provide Saudi Arabian travelers with the kind of travel information they seek, Seera Group launched Almosafer Academy in September 2019. The goal of this academy is to replace ticketing agents with trained travel advisers who are able to give travelers the kind of assurance they want and need when they travel outside of Saudi Arabia.

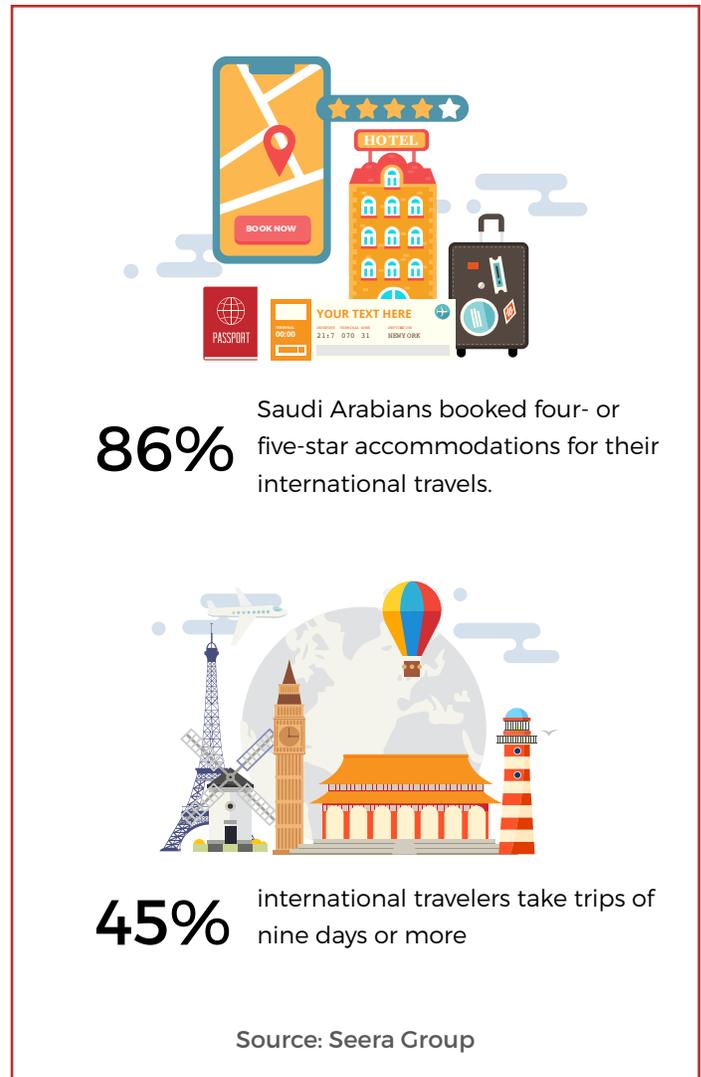
As part of a 10-week training program, students of the Almosafer Academy will visit top destinations for Saudi Arabians and participate in a dedicated destination training session delivered by Tourism Boards and travel specialists from Visit Britain, Dubai Tourism, Mauritius Tourism Promotion Authority, Azerbaijan Tourism Board, Bahrain Tourism and Exhibitions Authority, and Experience Hub, the trade and promotion arm of Yas Island Abu Dhabi.

Spending Habits

According to the Ipsos Report, 56 percent of respondents said they splurge on a trip, while 44 percent said they travel on a budget. Seera Group's internal data largely supports that finding.

When it comes to overarching travel spend habits, Seera Group's year-to-date (January to August 2019) data reveals that over 80 percent of Saudi Arabians prefer to travel via full-service airline carriers regardless of whether they are traveling domestically or internationally. A whopping 86 percent of Saudi Arabians book four- or five-star properties for their international travels. "Our data shows that the average spend on a four- or five star-hotel per night is \$180 during international travel, but 67 percent of Saudi Arabian travelers are actually spending above that average amount," said Louise Blake, vice president of data for Seera Group. Seera Group's data also reveals that over 45 percent of international travelers take trips of nine days or more.

"While often many trips start off with a budget in mind, because they don't yet know where they want to go, once they settle on a place, you will see that they spend a lot more than other nationalities on the actual experience," Arrow said. "Overall, they are value shoppers. They want to make sure that they are not being fooled and are getting [a product] worth their expenditure. But for the right kind of experience, if it is unique enough, if it is different enough, they will pay over the odds to access that experience."



“

Our data shows that the average spend on a four- or five star-hotel per night is \$180 during international travel, but 67 percent of Saudi Arabian travelers are actually spending above that average amount.

Louise Blake

Vice President of Data, Seera Group

DOMESTIC TRAVEL BEHAVIOR

Domestic travel is on the rise in Saudi Arabia. “Thanks to the various investments in Saudi Arabia’s infrastructure, there are new destinations within Saudi Arabia,” Ahussain added. “They are not just traveling within the Kingdom to visit family and friends but to explore new destinations and experience new things.”

According to Seera Group data, 79 percent of accommodations are booked at four- or five-star properties when Saudi Arabians travel within their country. The data also reveals that over 41 percent of domestic travelers take trips of three days or more.

On average, Saudi travelers book their domestic trips 12 days in advance, according to 2018 (January to August) data from Seera Group. During the same time period in 2019, the booking window for domestic trips dropped to just nine days.

The primary purposes for domestic travel are to visit family and friends, for pilgrim trips, and for business. However, with places to visit and experiences in Saudi Arabia that are similar to the international destinations they visit, things are expected to change.

AlUla, Saudi Arabia



BUSINESS TRAVEL TRENDS



The outbound business travel market in Saudi Arabia is smaller than the outbound leisure travel market, but there is year-on-year growth in this space. According to reports from Elaa, Seera Group's corporate and government travel unit, the number of business travel transactions between January and August grew by 38 percent, from 684,657 in 2018 to 1,107,921 in 2019. Elaa has 25 percent of the corporate and government business travel sector in Saudi Arabia.

"A whopping 90 percent of that travel volume on Elaa is accounted for by government-related travel, and almost 50 percent of business trips are booked

seven days or fewer before the trip," Blake said. Most business travelers travel domestically (72.73 percent), with about 3.5 percent traveling to Africa. Outside of the GCC countries, Egypt, India, and Sudan are the most popular business travel destinations. Business travel frequently happens in groups, with the average group size for bookings on Elaa being above three. The most frequently booked add-ons with these business trips are tours and rental cars.

Just like in leisure travel, the digital-first approach is taking over business travel as well. Announcing the launch of Rehlati by Elaa, an electronic travel order

platform, Abdulrahman Mutrib, chief technology officer at Seera Group said: "We are a digital-first company, committed to enhancing the standards of customer service and to bringing the latest technological know-how to the travel industry. As Saudi Arabia's and the region's leading corporate and government travel management provider, Elaa is continuously investing in advanced technology to seamlessly deliver the travel requirements of our clients."

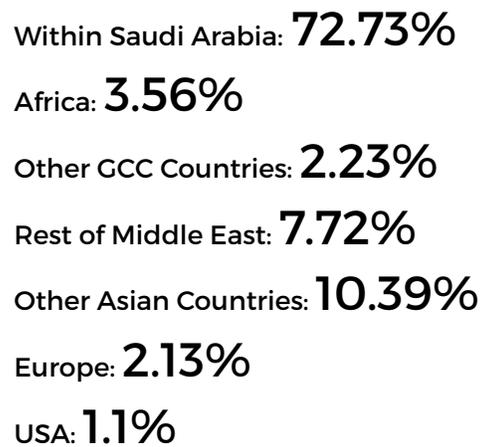
Rehlati is already serving more than 300,000 government employees and offers automated approvals within their booking platform. Any new rules are immediately incorporated into the system, and booking details are stored for easy analysis and tracking by the employer.

With the government's Vision 2030 plan opening up the market to create special economic zones and increase private industry investment, more international business collaboration can be expected, resulting in more growth within this segment. Business travelers, according to Elaa's data, are heavier spenders than leisure travelers and spend almost double the average amount per night.

Year-on-Year growth for the number of transactions between January and August



Destinations for Business Travel



UNDERSTANDING INBOUND TRAVEL TO SAUDI ARABIA

The Saudi Arabian inbound economy is currently heavily dependent on Hajj and Umrah pilgrims. However, investments by the Saudi Arabian government through the PIF demonstrate a desire to diversify inbound travel into Saudi Arabia beyond such trips. Developments at the Red Sea, AIUla, and Neom appear to focus largely on growing international inbound and luxury travelers. This diversification is also one of the key areas of focus in Vision 2030.

Speaking about the Red Sea development, “The destination is within eight hours of flying time from 85 percent of the world, so we expect visitors from around the world to visit,” Pagano said. “The GCC countries are important source markets, as are fast-growing Asian economies. Western Europe is the world’s largest outbound market for luxury tourism, and we also hope to attract visitors from that region. However, we hope our offer will appeal not only to the GCC and Western Europe but to discerning international travelers of diverse nationalities, faiths, and cultures.” Alongside an extremely luxurious experience, the project aims to offer activities such as hiking through rugged mountains, kayaking or snorkeling over protected coral reefs, and taking in the sight of dormant volcanoes.

Martin, of Twenty31 Consulting Inc., notes that given the challenges Saudi Arabia is currently trying to overcome, growing the domestic travel market will be the most lucrative for the Kingdom right now. He also identifies a few other travel segments that will be extremely lucrative for Saudi Arabia in both the short term and the long term.

“The most lucrative target markets for Saudi Arabia

Top Source Markets for Inbound Travel in the Future

Other GCC Countries and Expats Living in GCC Countries



Kuwait



United Arab Emirates



Bahrain



Oman

Fast Growing Asian Economies with Large Islamic Populations



Indonesia



Malaysia



Pakistan



India

High Net-Worth Individuals and Expat Saudi Arabians Settled in Western Europe and North America



U.S.A



U.K



Germany



France

right now are higher net worth, educated individuals who have traveled a lot, seen other parts of the world, and are now looking for an experience that will stand out,” Martin said. “They have been to Jordan, they have seen Abu Dhabi, and they are now looking for something else – something they can’t find elsewhere. And they find the chance of going to a UNESCO World Heritage site in AlUla or to see unspoiled nature in the Red Sea region very enticing.”

In terms of countries to target to increase inbound in the future, “GCC nationals who are familiar with the Arabian culture, political structures, and customs, etc. because they have the same in their home countries would be primary targets,” Martin said.

There is a lot of potential for increasing inbound from fast-growing Asian economies with a majority or large Muslim populations. India is an especially lucrative source market. As of 2018, there were 1.54 million Indians in Saudi Arabia – visiting friends and family can contribute significantly to growing inbound tourism. From Riyadh to Mumbai, there are typically more than two flights a day, and it takes only 4 hours and 10 minutes.

As for the other countries with large Muslim populations such as Malaysia and Indonesia, “Their outbound travel market sizes are small, but there’s a natural understanding that they’ll get halal food, there’s not going to be alcohol served,” Martin said. “They have some interest in doing an extension of a religious trip. Or they have already undertaken Hajj and/or Umrah and are looking for a leisure vacation, so there’s a possibility that they are a viable option as well.”

Arrow noted that enticing Hajj and Umrah travelers to extend their trips is perhaps one of the most viable strategies to grow inbound and spread the word about Saudi Arabia’s travel offerings. “One very fortunate thing is that Makkah and Madinah are in very close proximity to some of the most beautiful historical sites in Saudi Arabia. It’s an opportunity to explore some of the other offerings beyond the religious offerings of this country,” Arrow said.



Lahore, Pakistan

During the September 2019 announcement of offering tourist visas and evisas, His Excellency Ahmad Al-Khateeb, chairman of the Saudi Commission for Tourism and Heritage, also announced that while women visiting Saudi Arabia will not require to wear abayas, they will be expected to dress “modestly.”

Travel brands looking to target international inbound have their work cut out for them. They must find a way to balance the needs and expectations of international travelers with local cultural restrictions and norms. IHG opened its first hotel in the country in 1975, but at the same time, with 5,700 hotels around the world, they are keenly aware of what its international guests are looking for. International service standards nuanced for the cultural context of every market is the way forward, according to Gauvin.

“We believe that while KSA is not an unknown country to international travelers, it is still undiscovered as a tourist destination,” he added. “There are many travelers who are looking forward to visiting the Kingdom and exploring its offerings, heritage, natural landscapes, traditions, and cuisine in addition to the new tourist attractions being developed by the government, while respecting and appreciating its cultural environment.”

The Kingdom is also recognizing the need to ease restrictions in order to truly be a viable option for international travelers. “The Red Sea Project will be formed in a special economic zone with a world-class regulatory environment built around relaxed social norms and designed to welcome visitors and investors alike. Western dress codes will be quite acceptable, for example,” Pagano said.

“For the country and for the group, inbound is a completely new business that requires a lot of investment in the infrastructure, as the country is doing now. But it’s going to be very lucrative for Saudi Arabia in the long term,” Ahussain said.

Recognizing the potential of the inbound travel market, Seera Group is looking at investing in that space as well. “We are very serious about the inbound business, and we have all these partners who are working on creating a dedicated inbound division that will focus on identifying the various needs of various source markets and which of the source markets we want to focus on,” said AlDawood. “We are looking into the kind of products required to build packages around that. We are also working to create a technology platform that enables multiple tour operators or travel agencies around the world to be able to access Saudi content.”

Rijal Alma'a, Saudi Arabia



HAJJ AND UMRAH TRAVEL SEGMENT

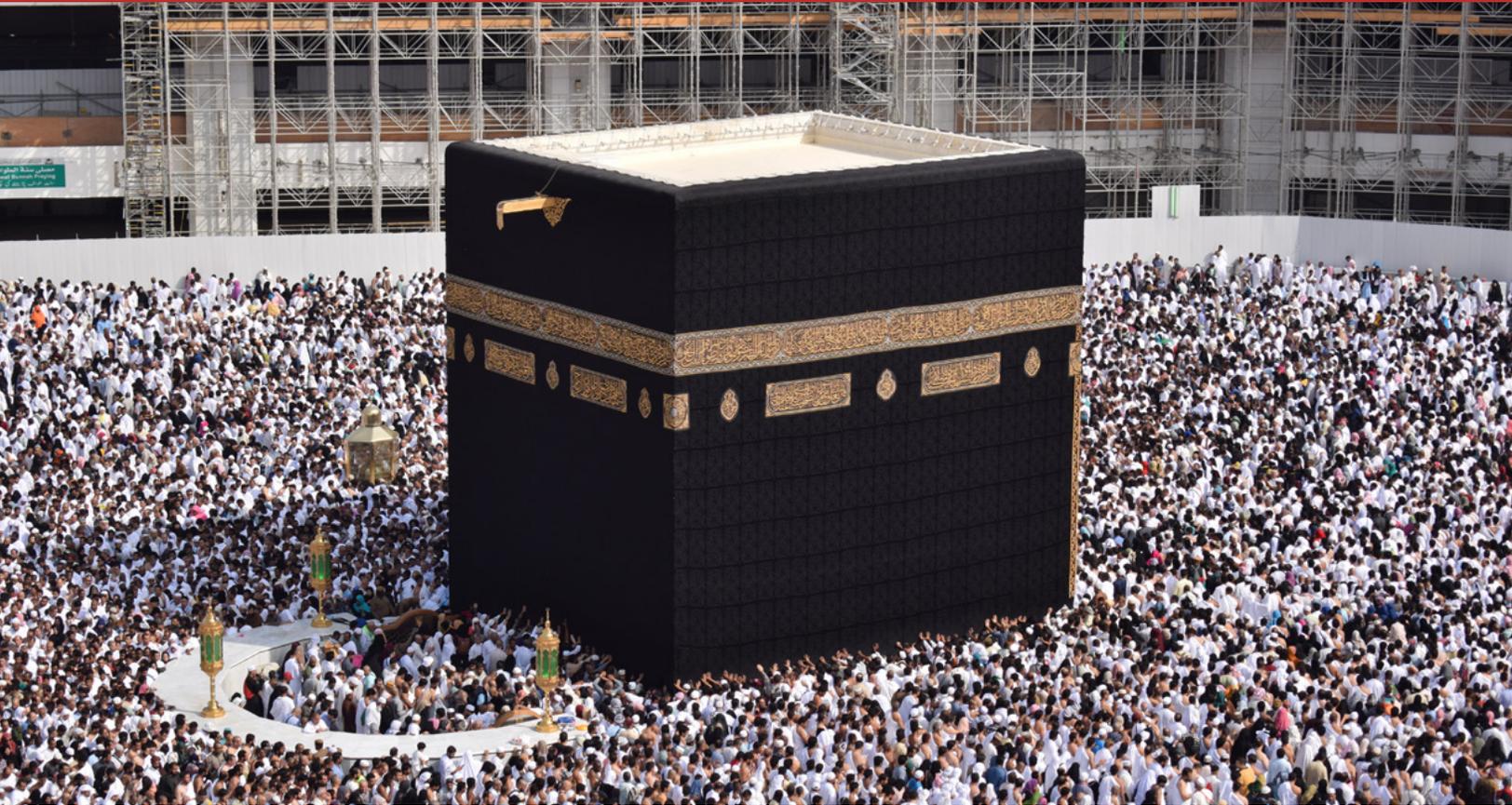
The Saudi Arabian monarchy is the gatekeeper of the two holy cities and the mosques of Makkah and Madinah. The Muslim community undertakes two kinds of pilgrim trips to these mosques: Umrah, which can be completed any time of the year, and Hajj, one of the five pillars of Islam, the annual pilgrimage trip that is considered a mandatory religious duty to be carried out at least once in their lifetime.

Until a couple years ago, Muslims from around the world who wanted to visit Makkah or Madinah for Umrah could only do so within a short window of two or three months a year. Following the announcement of tourist visa in September 2019, visitors can now not only complete their Umrah pilgrim trips any time during the year but they also do not need specialized Umrah visas anymore. Visitors with a tourist visa can undertake Umrah.

Hajj and Umrah travelers are the primary inbound travelers into Saudi Arabia, and this segment has been growing every year. According to the Vision 2030 document, the expansion of the two holy mosques in Makkah and Madinah tripled the number of foreign Umrah visitors over the last decade from 2005 to 2015, reaching a height of 8 million in 2015. As of August 2019, the number of pilgrims performing Umrah has exceeded 2.4 million. The 2019 Hajj season saw more than 1.8 million international pilgrims traveling to the Holy City.

Mawasim, Seera Group's Hajj and Umrah focused brand, offers tour packages to tour





Makkah Grand Mosque, Saudi Arabia

operators in key source markets. Mawasim is one of the few licensed agencies that work with the government to procure the right visas for Hajj travel. While travelers can undertake Umrah with a tourist visa after the September 2019 announcement, there are only a limited number of Hajj visas available for every country. And the process can get extremely complicated.

“The number of Hajj and Umrah travelers is constantly growing, and we aim to simplify the trip planning process with products and packages that make sense to our customers,” said Tarique Khatri, vice president for the Center of Excellence at Seera Group. Travel agents often buy different elements of the Hajj and/or Umrah travel package separately. They rely on one agency to help with the visa, another for airline tickets, another for accommodations — and if someone wants to extend their trip, there are more vendors involved. “The result is inconsistencies when it comes to service delivery,” Khatri said.

Mawasim uses its data to create travel products and packages that work for the customer. They offer tour

operators options to buy tours with varying degrees of luxury and as focused or diverse as they want. “For a customer who has bought one of our VIP packages, for example, they arrive in Jeddah, they have a BMW waiting to take them to their hotel, they have reservations at five-star hotels and are already checked in, they go straight to their room, and if they want to explore Jeddah, we arrange for guided tours as well,” Khatri said. Other luxury travel perks include transport to Makkah and Madinah, express access to the mosques, and so on. Every step of the traveler’s arrangements is taken care of.

But Khatri also pointed out that none of these packages are made arbitrarily. “We carefully evaluate the preferences and behaviors of our source markets before we put together a package. For example, those traveling from Egypt typically like to spend a particular number of days on average in Madinah and a particular number of days in Makkah. Those numbers differ for Indian pilgrims, and our packages are designed to meet those needs and expectations,” Khatri noted.

According to Khatri, apart from facilitating “Hajj and Umrah visits within the Kingdom, Mawasim will serve key international source markets, including Kuwait, the UAE, Jordan, Egypt, Algeria, India, Pakistan, Indonesia, Malaysia, and Iraq, among others, addressing the requirements of all four key traveler segments: individuals, couples, families, and groups.”

In order to meet the demands of the growing number of Hajj and Umrah travelers, the government is directly investing or facilitating investments from the private sector. “The Haram Mosque is the most important mosque for Islam and is being expanded; there are many new hotels under construction and many new properties that are opening,” Khatri said. To improve access to the holy cities, there are new high-speed train connections between Jeddah, Makkah, and Madinah.

In spite of all these developments, demand currently outpaces Saudi Arabia’s ability to grow the infrastructure and speed of processing visa applications, and keeping up will be key to actually capitalizing on the demand.

In terms of what religious travelers are looking for, based on Mawasim’s findings, one of the most popular requests is for accommodations that are close to the Haram Mosque. “Ultimately it comes down to the budget, but of course, they want to stay closer to Haram, because the closer they are, the more frequently they can go to Kabbah,” Khatri said. Kabbah is the building at the center of Haram Mosque.

Mawasim also finds that after completing their pilgrimage, many travelers want to stay on in Jeddah to explore the city and do a little bit of shopping. Also, while the main mosques of Makkah and Madinah are the primary religious draws, Saudi Arabia’s significance to the genesis of Islam means that there are other religious and historic sites near the holy cities that people often want to stay and visit.

However, it is not just other travel segments that stand to benefit from an increase in inbound pilgrim trips. “We have already seen business travelers in some cases extending their stay to undertake Umrah,” Khatri said. “With business travel growing, we expect Umrah consumption to grow as well.”

Madinah, Saudi Arabia



CONCLUSION

Saudi Arabia has a lot of ground to cover and is making significant moves to grow domestic, Hajj and Umrah, business, and international inbound travel markets. Travel brands with a presence in Saudi Arabia are extremely positive about the future of international travel to Saudi Arabia as well, especially with the latest announcement around electronic visas. "Saudi Arabia is poised for a new era of travel as the country undergoes a historic period of growth and transformation to make the Kingdom more attractive to travelers," Gauvin said. "While religious tourism will remain important to the sector, we expect to witness a significant increase in leisure and business travel." And the goals, benchmarks, and other programs highlighted as part of Vision 2030 will be key to driving that significant increase.

One thing that is clear about Saudi Arabia's transformative journey: Travel brands from around the world looking to gain visibility with Saudi travelers or looking to enter the Saudi market need local knowledge. While on the surface, halal food, prayer rooms, and safety seem like the obvious needs to keep an eye out for, the ultimate booking decision stems from a more nuanced understanding of traveler preferences, behaviors, goals, and life stage.

The outbound and the Hajj and Umrah travel markets in Saudi Arabia are already very mature and evolved. The inbound, business, and domestic travel markets are, however, the markets where the most potential for growth lies. "Global travelers now are looking for new experiences," McAuley said. "They don't want to go on the cruise ship or the tour bus and have exactly the same itinerary as 50,000 other people. They want to go back home and talk about the new destination, the new experience, because that's more interesting for them and actually that's what they get more out of. I see Saudi in that realm at the moment. It's for those people who want to discover something new; this is the time for discoverers."



Dadan Kingdom, Saudi Arabia

The different agencies within the Saudi Arabian Government as mentioned earlier in the report are making direct investments and partnerships with the private sector companies. The approach currently is to make these investments as holistic and diverse as possible in order to make tourism a sustainable and long-term player in the Kingdom's economic future.

When any new destination opens up, there is a lot of communication that has to happen in terms of why it should be considered a destination. "Destinations are not built overnight, and any destination that has gained a lot of popularity has done so over a period of time," Khatri said. That effectively sums up the state of travel in Saudi Arabia. It is a new destination, opening up its borders to tourists for the first time. The international community is watching, not only to see where all these "liberalization efforts" lead but also to see if there is going to be a new destination on the world stage.

ABOUT SKIFT

Skift is the largest intelligence platform in travel, providing media, insights, marketing to key sectors of the industry. Through daily news, research, podcasts, and Skift Global Forum conferences, Skift deciphers and defines the trends that matter to the marketers, strategists, and technologists shaping the industry.

SkiftX is Skift's in-house content marketing studio, working collaboratively with partners like Adobe, Airbnb, Hyatt, Lyft, Mastercard, and many more on custom projects to engage the world's largest audience of travel influencers and decision makers.

Visit skiftx.com to learn more or email skiftx@skift.com.

The Skift logo is rendered in a bold, black, sans-serif font. The letter 'i' in 'Skift' has a dot, and the letter 't' has a vertical bar that extends slightly below the baseline.

ABOUT SEERA

Seera (formerly Al Tayyar Travel Group) is the most knowledgeable, accomplished and diverse provider of travel services in the Middle East and North Africa region. A balanced portfolio of brands across six verticals within the travel and tourism industry positions Seera as a significant contributor to the growth of the domestic, in-bound and outbound tourism economies of the Kingdom of Saudi Arabia and a best-in-class business partner in unlocking the opportunities in the region. Providing technology powered travel services for consumers, businesses, government partners and religious pilgrims, Seera provides the opportunity to travel in the Kingdom, across the region, and beyond, like never before.

Seera - Imagine Where Travel Can Take Us Together

