Overview

1. Understanding why
2. Objectives and Research Plan
3. Results
4. Conclusions and Recommendations
1. Understanding why
Why the traveller?

Understanding the travel industry from start to finish

In any industry, understanding how the work of an organisation affects every other aspect is imperative for success.

In travel, one of these key components is the **traveller**.

Whilst Amadeus does not directly work with the end consumer, to better serve their customers, travel providers, Amadeus has a requirement to know exactly what the consumer wants.

By understanding the consumers’ needs, Amadeus can:

**Provide all components in the travel chain:**
- Better products
- More effective services
- More insightful consultation

**Create even more value by supporting**
- Cutting-edge innovation
- More in-depth research & development
- Forward thinking ideas

Through taking the time to research and understand travellers, Amadeus aims to support and improve the overall travel ecosystem and to help shape the future of travel.
The ATTO initiative’s objective
(Amadeus Traveller Trend Observatory)

Better understand the evolution of traveller behaviour & needs, through the systematic deployment of a proven and focused research methodology

1. Steering Committee
   - An external communication plan
     - A communication plan to deliver externally the main outcomes from the yearly traveller research undertaken
   - Trend observatory, Primary research, Secondary research, Subscriptions
     - Online interactive platform with all studies, trends and overall information around travellers made available to share, upload and download.

2. Internal Data repository

3. Research plan

4. ATTO’s continuous cycle of innovation

- Sharing best practices from consumer studies
  - A monthly committee meeting to exchange information about traveller research studies.

- Focus on strategic consumer segments and topics to develop in an annual research plan
  - A detailed action plan is put in place to meet the yearly traveller research needs.
2. Objectives and Research Plan
Understand trip planning and travel behaviours more generally

Explore travel experiences, pain points, delighters and future needs amongst the target

Identify opportunity areas based on the above and reveal under-served / un-catered for needs

Determine how previously identified travel trends and insights relate to the target

Explore expectations and requirements of Travel Agents

Target definition for the study

**Halal Travellers:** travellers who wish to maintain Muslim principles (i.e. prayer, food, cultural norms) while travelling
Why Halal travellers represent a strategic target:
Halal Tourism will grow by **50%** (volume) and **35%** (value) in the next 5 years

<table>
<thead>
<tr>
<th>Market size</th>
<th>Trends and predictions</th>
<th>The potential</th>
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<tbody>
<tr>
<td>- The Halal Tourism sector was estimated to be valued at <strong>$145 billion</strong> in 2014</td>
<td>- The typical Muslim consumer is now younger, educated and with a <strong>larger disposable income than before</strong>, which has precipitated an increased propensity to travel</td>
<td>- Halal travellers are expected to grow from 110 million to <strong>150 million visitors by 2020</strong></td>
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<tr>
<td>- Halal Travel is one of the fastest growing travel sectors in the world, with an <strong>estimated growth rate of 4.8%</strong> against the 3.8% industry average</td>
<td>- Muslim <strong>population growth</strong> currently outpaces general population growth and is expected to continue to do so</td>
<td>- Eventually Halal travellers will represent <strong>11% of the market</strong> with an expenditure projected to grow to <strong>$200 billion</strong></td>
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Societal, political and economic factors mark out Halal Travellers as an interesting audience

<table>
<thead>
<tr>
<th>Societal factors</th>
<th>High consumer purchasing power of MENA tourists</th>
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<tbody>
<tr>
<td></td>
<td><em>Prevalence of middle and upper class</em></td>
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<td></td>
<td><em>Consumers have capability to ‘go anywhere and do anything’ – desire and ability to experience and explore the world</em></td>
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<table>
<thead>
<tr>
<th>Political factors</th>
<th>International governments actively attracting Halal travellers</th>
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<tr>
<td></td>
<td><em>Schengen and UK visa waiver for UAE nationals</em></td>
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<td></td>
<td><em>‘Muslim destinations’ (Malaysia, Turkey) continue to attract MENA tourists</em></td>
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<td><em>Non-Muslim destinations now actively going after this audience (South Korea, Thailand)</em></td>
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<tr>
<th>Economic factors</th>
<th>Family-orientated society</th>
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<td></td>
<td><em>More so than other Muslim countries, travellers from the Gulf countries typically travel in large family groups</em></td>
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<tr>
<td></td>
<td><em>Rarely do families travel in groups &lt;10</em></td>
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</table>
Methodology
Multi-faceted approach to truly understand the experiences, frustrations and needs of Halal Family Travellers

Identify
Develop hypotheses about the target and their needs
- Desk research
- Social Media review
- Expert interviews

Validate
Primary research to explore traveller experiences
- Focus groups with locals and expats in MENA
- In-home interviews

Deliver
Comprehensive deliverables to bring target to life
- Report
- Video
- Press release
- Infographic
- Ad hoc presentations

+70 Interviews

+50 Halal Travellers
UAE and Saudi Arabia

15 Industry Experts

5 Local Travel Agents
We engaged with people from a range of backgrounds, with varying travel attitudes and behaviours

- Family life stage – mix of younger and older kids in family
- Make at least 2 international trips per year
- Travel for a variety of reasons and to a mix of known / unknown destinations
- Varied attitudes towards technology – Innovators, Early Adopters, Early Majority and Late Majority
- Both local and expat populations included where relevant
3. The Results
Not all Halal travellers have the same needs

We have identified 6 key defining variables

Understanding the variety of different Halal travellers is key as they don’t have the same needs or expectations, even priorities for the same traveller can vary from trip to trip.

EXPLORATION

**Comfort**
- Travels to known destinations
- No compromise on ‘family friendly’
- Halal food key

**Exploration**
- Seeks out new destinations
- Appreciates may see cultural ‘shocks’
- Flexible (food etc)

COMPANIONSHIP

**Core family**
- Travelling with spouse, kids
- But can’t assume it’s strictly a small group!
- Often UAE expats

**Extended family**
- Travelling with a wider family group
- May include siblings, parents / in-law, maid, friends etc

FINANCE

**Deal-seeking**
- Want to keep costs to a minimum
- Not necessarily cost-constrained
- ‘Savvy shoppers’, don’t see value in big spend

**Simplicity-seeking**
- Wants things to go smoothly
- Prepared to pay more / ignore cost
- Often when in unknown / non-Muslim destinations

“Muslim travellers are not all the same. Muslims travelling from Egypt will not be the same as those travelling from Saudi. Even within a market, there are big differences. We need to understand their uniqueness in order to sell our products”

Amadeus Travel Agent customer
Women play a decisive role in the travel decision process, planning and some of the logistics:

- This is a cumbersome process where they are mostly relying on word of mouth, relatives and friends.
- Technology and social media are also essential, especially Instagram.
- Women want activities to keep the whole family happy — shopping is also important.
- Women also gain social status from places visited.

Women are strong influencers

Having a key role in the destination choice and holiday planning

“I usually need to compete with my wife, we both search until we see who gets the best price. Usually my wife is the planner.”

Traveller

<table>
<thead>
<tr>
<th>Level of involvement:</th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
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<tbody>
<tr>
<td>Dad</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Mum</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Kids</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Destination selection</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>‘Final sign off’</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Guided by wife</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Booking flights and hotels</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Ultimate responsibility</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity plan and booking</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delegates to wife, makes suggestions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managing trip logistics</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Ultimately responsible for transfers etc</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extra trip preparations</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Helps wife but mostly ‘told what to do’</td>
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Traveller

14
We have identified 3 core themes revealing Halal Traveller needs

1. Maximising Trip Value
   Halal seekers plan their trip to maximise their experiences
   - Halal Travellers often adopt a hyper-planning holiday mode
   - Halal Travellers like packages, but find them basic and inflexible
   - Travellers are more motivated to use agents for “complex” trips

2. Relevant Accommodation
   They prefer Halal-friendly accommodation that gives them freedom
   - Apartments / chain hotels are preferred
   - Hotels/resorts must support traveller’s ‘cultural comfort’: many hotels currently fail to meet prayer and dining requirements
   - Women struggle to find relevant hotels

3. Family-friendly destinations
   At destination, Halal seekers want to explore within their comfort zone
   - Aiming at adapted excursion plans catering their requirements
   - Personalized dining options fitting different preferences
   - Smart transportation at destination, ensuring knowing the way
When traveling with their families, Halal seekers want to ensure that everything is as smooth as possible, they like to rely on travel agencies specially for complex trips (not known/ first time destinations, longer vacations, multi-destination, extended family)

They appreciate the possibility of booking in advance however they want to travel packages that are flexible, can be changed and tailored to their specific needs

—I pay the package but if I then don’t the tour, it is overrated. I don’t want to be with the tour all the time. The price is the same if you don’t want all the package” Traveller
Finding the right accommodation is a key concern (family trips can be long, many family members)

Hotel chains guarantee a strong brand and standard services (consistency expected across markets); some already provide adapted services

Serviced apartments are a valuable option: offer independence while providing key service, appropriate space and dining capabilities

Main needs expressed in relation to accommodation:

- Respect of Muslim principles (in relation to alcohol, dining, entertainment areas, praying facilities, etc)
- Women want to be able to relax in relation with what they consider suitable (dress code, gender segregated areas, etc)

<table>
<thead>
<tr>
<th>Apartments / Private villas</th>
<th>Apart-hotels</th>
<th>Hotels</th>
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<tbody>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Cons</strong></td>
<td></td>
</tr>
<tr>
<td>- Large family can stay in one apartment</td>
<td>- Can be far away from centre and / or key sights</td>
<td>- Expensive</td>
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<tr>
<td>- Cooking facilities</td>
<td>- No ‘go to’ in case of issues or problems</td>
<td>- Often not large enough for whole family (more like small serviced apartments)</td>
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<td></td>
<td>- No cleaning service</td>
<td>- Limited inter-connecting rooms</td>
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<td></td>
<td></td>
<td>- Cultural comfort</td>
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<tr>
<td></td>
<td></td>
<td>- Changes to room booking</td>
</tr>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Cons</strong></td>
<td></td>
</tr>
<tr>
<td>- Family can stay in one apartment</td>
<td>- Expensive</td>
<td></td>
</tr>
<tr>
<td>- Cooking facilities</td>
<td>- Full service</td>
<td></td>
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<tr>
<td>- Hotel services on hand (room service, varied dining options etc)</td>
<td>- Well located</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Concierge on hand (trust concierge)</td>
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</tbody>
</table>

“I avoid hotels with discos: if the hotel has a disco, I won’t go there with my family.”

“I like apartments. I like to cook, I want my privacy.”

“I think it is important that the hotels recognize the needs of the Muslim travellers…”

“…”
Family-friendly destinations

Excursions, dining and ground transportation are key success elements aiming at a personalized travel experience

They would like to book in advance “family-friendly” (i.e. wife and kids not seeing inappropriate behaviour) destination activities – especially when travelling with the extended family. But often agents lack information / right offers. This means that travellers end up booking with providers or hotels directly. Excursions integrating Halal dining options and praying possibilities would be a plus.

Halal travellers want to have dining alternatives: some want high end or gourmet options. Others want to be able to experience local cuisine in a Halal way. Others simply want access to the Halal equivalents of the popular ‘fast-casual’ eateries.

Large travelling groups mean Halal Travellers often want to tailor their transport: private drivers in particular appeal to husbands who are sometimes concerned about not looking ‘expert’ in a country, a private driver allows them to avoid these situations.

“Food is important. When it is not good, usually my family suffers. It should be suitable for my kids and family. Kids choose food they want to eat but I prefer to go to the market place”

“I search a place with activities that I do not have here: theatre, movies, festivals...”
4. Conclusions and Recommendations
Conclusions & recommendations

Role of agencies and Amadeus

- Agencies play a **essential role** in supporting travel planning based on **mutual trust**
- Agencies need to understand the **context** in which the traveller is planning their trip
- Agencies’ biggest perceived added value is in **complex trips** in unexplored, non-Muslim destinations: agencies should offer **holistic holiday advice** and 360 degrees support
- **Women** play a key role in travel decisions: agencies should facilitate/support women in the **inspiration** and **decision** phases
- Agencies should provide a **packaged yet flexible end-to-end travel experience**, **personalised** jointly with the traveller, and which includes service at destination. As there is a strong preference for booking in advance, this end-to-end offer could represent a way to add sales and cross-sell other products

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**Examples of Business Opportunities**

- **‘Inspiration’ campaigns** showing ‘undiscovered’ destinations
- Create a **network of female reviewers/bloggers** on a Travel Agent’s holidays & packages (via discounts on holidays, points / gamification)
- **Buy now/pay later** option
- Make packages fully **customisable** by customers
- **Signpost Halal-friendly hotels** in non-Muslim destinations
- **Rating system** to grade hotels & resorts on women’s facilities
- Create **network of locals** who can provide different, Muslim / family-friendly experiences
- Multiple ground transportation options as part of packages (basic transfer via coach, exec car / limo...)
Thank you!