

المسافر
Almosafer
Part of Seera Group

Insights & Trends of the Saudi Traveller

May 2024



Report based on proprietary booking data from Almosafer's Consumer Travel Business.

Comparisons are based on bookings placed between January 1st - April 20th, 2023 vs. January 1st - April 20th in 2024.

The percentage increases/decreases have been rounded up/down to the nearest whole number.

Key Findings

With a steady rise in international and domestic travel, Saudi Arabia's tourism industry continues to show an uptick, revealing an upbeat sentiment towards travel among Saudi travellers.

Travel insights and trends derived from proprietary data from Almosafer's omnichannel consumer platforms show customer booking behaviors have evolved in the first four months of 2024 compared to the corresponding period in 2023.

Dubai, Doha, Manama, Cairo, and Istanbul remain the top favourite international destinations among Saudi travellers. At the same time, there has been a significant shift of focus towards South Asia and the Far East with Tokyo, Singapore, and Bangkok increasingly seeing more footfall from Saudi travellers. European capitals including Madrid and Amsterdam are also emerging as trending destinations.

The top destinations drawing Saudi travellers domestically continue to be Makkah, Riyadh, Jeddah, Al Khobar and Abha. New hotspots like AlUla, Tabuk and Hail are among the trending destinations this year.

Saudi travellers are keen to make the most of their travels, as they focus on achieving ultimate value with many choosing to spend more on in-destination experiences.

The addition of new flight routes, increased capacity, and the opening of new airports in the Kingdom have led to more affordable flight options on low-cost carriers (LCC). While Saudi travellers are willing to spend on luxury stays and experiences, they take advantage of budget-friendly flight options.

There has also been rising interest from Saudi travellers for Apartment rentals and Aparthotels, as these accommodation options offer a convenient alternative to hotels, especially for destinations with lower hotel availability, or for a flexible and convenient stay.

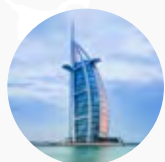
Saudi travellers are further enhancing their in-destination experiences by seeking out increased domestic and international offerings for local activities such as concerts, sporting events, cultural activities, and access to attractions.

Overall, Saudi travellers aim to maximize the value of their travel bookings as they explore their country and destinations further afield and seek out ways to get the most out of their bookings to create truly memorable travel experiences.

Top & Trending Destinations

Top Destinations

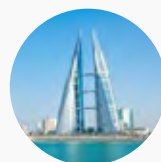
International



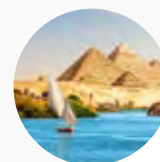
Dubai



Doha



Manama

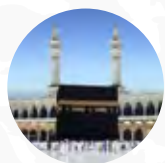


Cairo

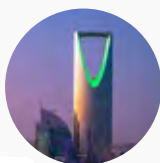


Istanbul

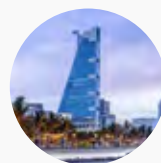
Domestic



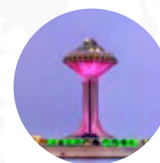
Makkah



Riyadh



Jeddah



Al Khobar



Abha

Trending Destinations

International



Madrid



Tokyo

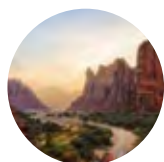


Bangkok

Domestic



AlUla



Tabuk



Hail

Domestic Travel

+29%
total bookings

Increase in Total Booking Volume



Flight
+27%



Hotel
+40%



56%
of total
bookings

2023

53%
of total
bookings

2024

Share of Total Booking Volume

More than half of all bookings are for domestic destinations, showcasing the continued demand for domestic travel.

Booking Channels



91%

of total bookings
Online



9%

of total bookings
Retail



12%
WhatsApp

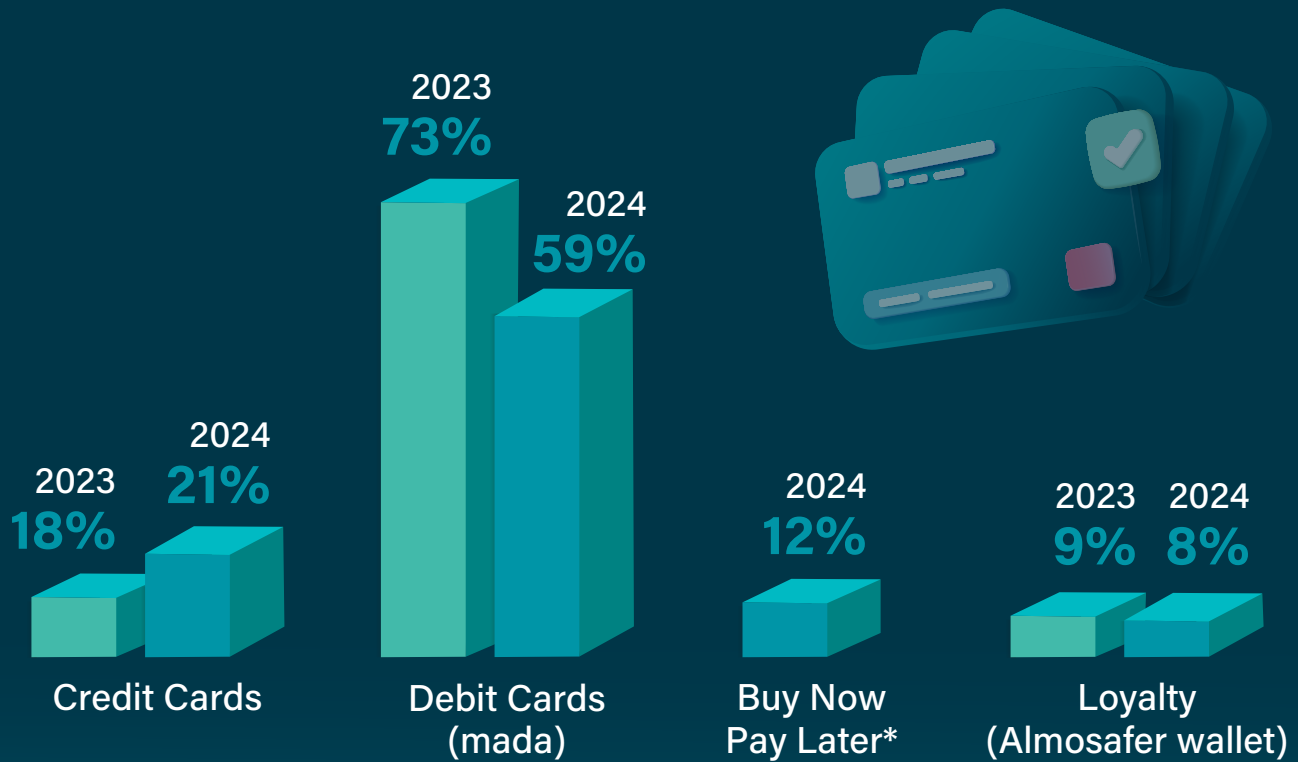
Growth in WhatsApp bookings

+14%

total booking
volume



Payment Methods

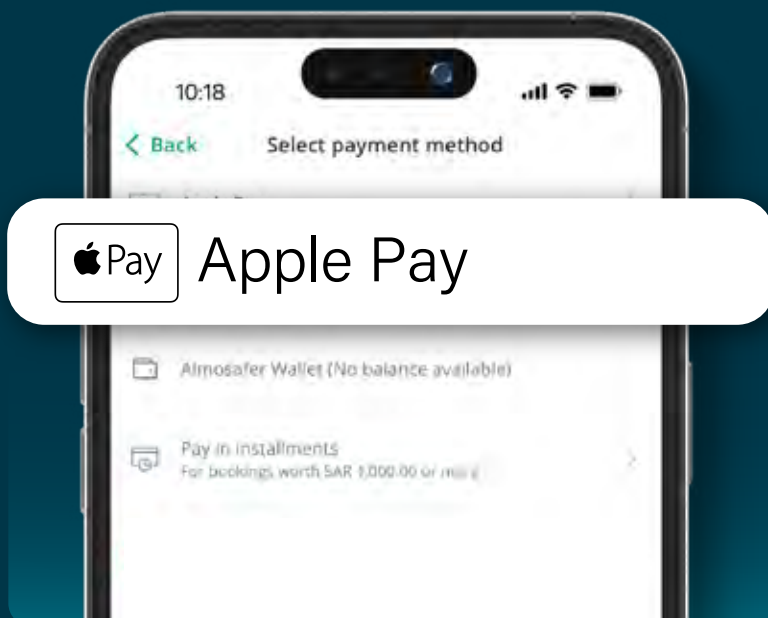


*Buy Now Pay Later is expanding the pool of eligible travellers by increasing affordability of travel to new customer segments.

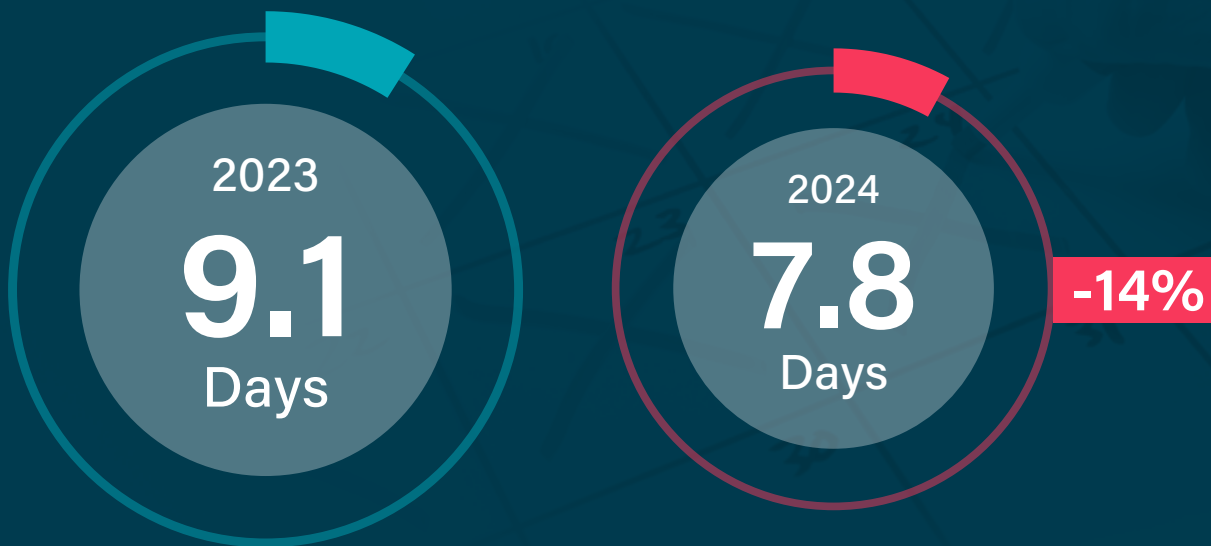
41%

of all bookings 2024 vs. 36% in 2023

Apple Pay continues to rise as a key payment method for Saudi travellers.



Average Trip Length



International bookings



Saudi travellers are opting for shorter and more frequent trips due to shifted academic holiday calendar.



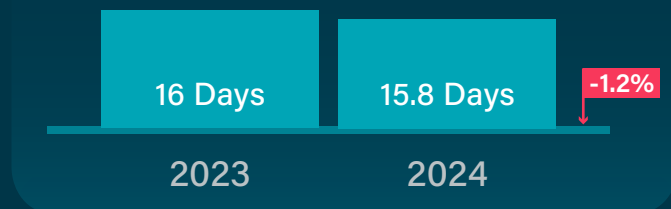
Domestic bookings



Average Booking Windows



International bookings



Domestic bookings

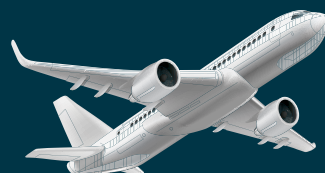


Average booking Window By Booking Channel

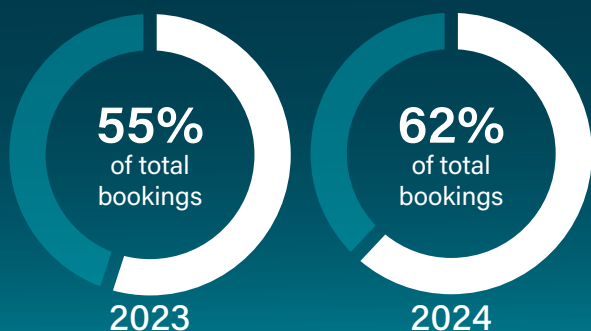


Retail bookings are made further in advance, especially for international trips that require consultation with a travel advisor.

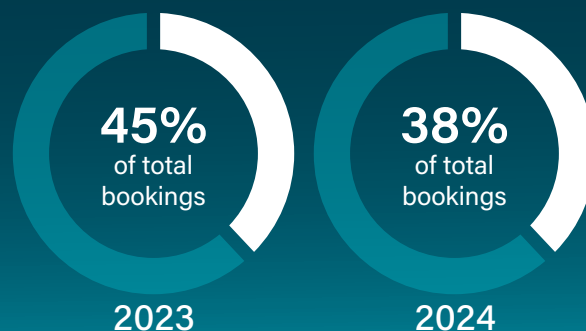
Low Cost vs. Full Service Carrier



Low Cost Carriers



Full Service Carriers



Share Of Low Cost Carriers By Trip Type

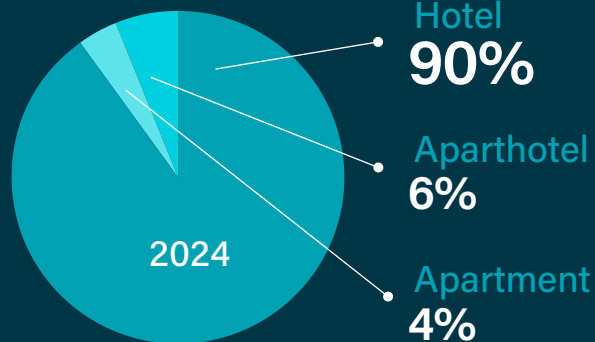


Growth in LCC bookings due to continued expansion of routes and connectivity.

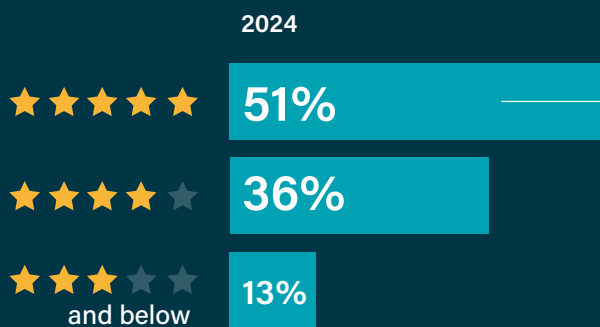
Accommodation Trends



Type Of Accommodation



Hotel Star Rating



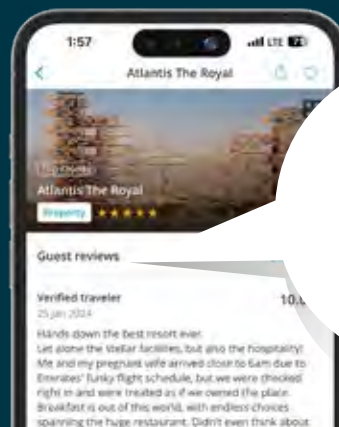
Luxury stays remain the preferred type of accommodation for Saudi travellers.

Reviews

Reviews have become an essential step in the decision-making process.



48% of customers visit the reviews on hotel details pages

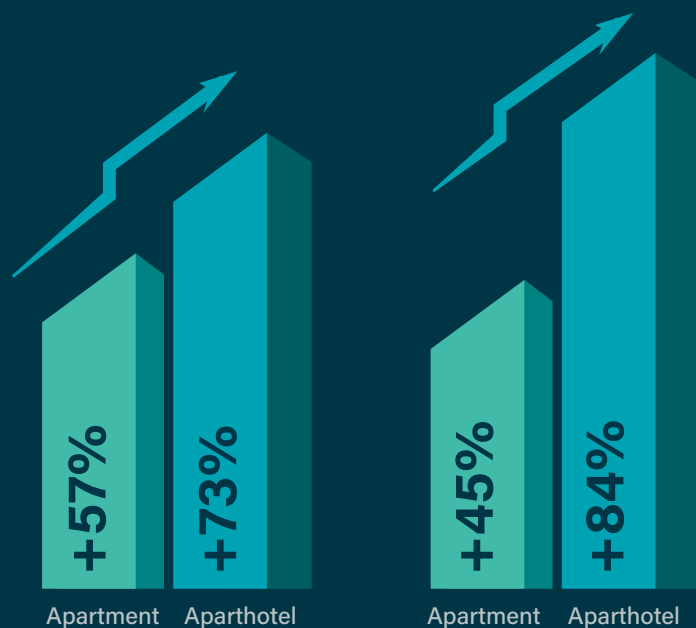


no of reviews submitted

2X

2024 vs 2023

Growth of Alternative Accommodation



Increase In
Total Booking
Volume



International
bookings



Domestic
bookings

Top alternative accommodation booking destinations



Increase in total booking volume

Average Order Value



Overall

-5.8%

2023 vs 2024



International

-5.1%

2023 vs 2024



Domestic

-6.9%

2023 vs 2024

Less spend due to low-cost carrier and alternative accommodation bookings

Traveller Types



Solo

24%
of total bookings

19%
of total bookings

2023

2024



Couples

63%
of total bookings

64%
of total bookings

2023

2024



Family

8%
of total bookings

10%
of total bookings

2023

2024



4+ Group

5%
of total bookings

7%
of total bookings

2023

2024

Saudi travellers made the most of the holiday season in Q1 to travel with family and friends.

Activities Spotlight

Top Activity Type



Concert tickets



Riyadh Season passes



Access to attractions



Culturally-focused events

3.5 Days

average booking window for activities

Top Cities for Activities



Domestic bookings



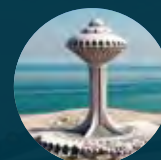
Riyadh



Jeddah



Makkah



Dammam



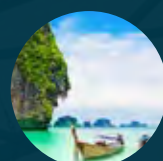
International bookings



Dubai



Bangkok



Phuket



Abu Dhabi