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TRAVEL INSIGHTS REPORT

May 2022



Report overview

It's been an undeniably rocky road for the entire travel industry. After an unpredictable period, optimism towards travel has returned. Wego and Cleartrip Travel Insights Report delves into traveller sentiments and readiness to travel in a post-COVID world. These findings are brought to you from our independent research and data on MENA travellers' behavior. Recently, around 4,390 residents from UAE and KSA were asked about their thoughts, and behaviors surrounding travel. The report also highlights the impact of COVID-19 on travel, the trends currently being witnessed and positive signs of recovery.

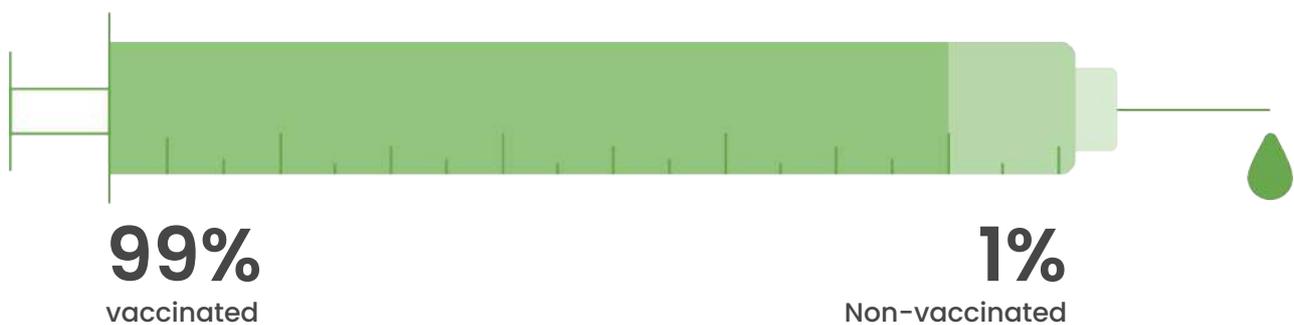
The near-term outlook for travel looks favourable, and people are looking to spend more and travel longer in 2022.



Travel Scenario

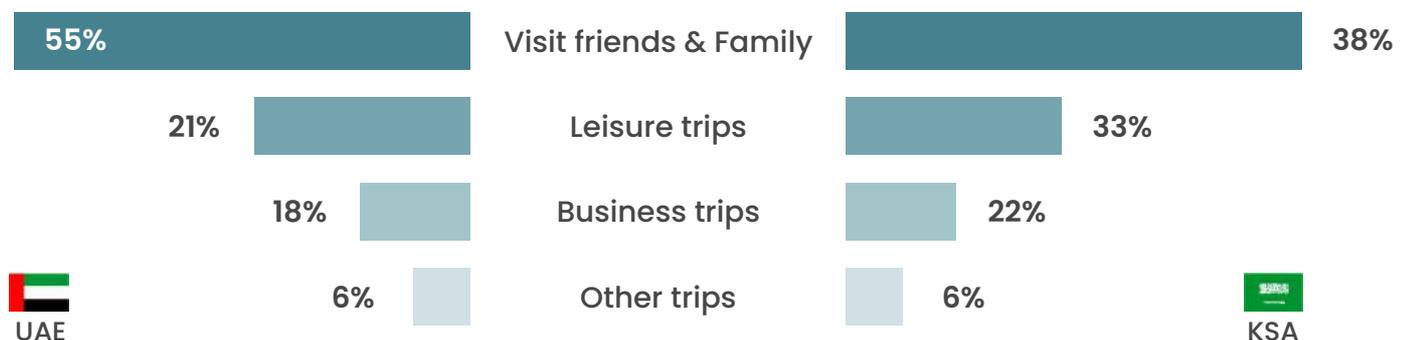
After numerous lockdowns, never ending changes in restrictions and the constant updates on flights, airport protocols and hotel capacity changes, a lot of passengers are still eager to travel albeit being a bit more cautious.

Vaccinated travellers



Out of the total survey respondents by Cleartrip, 99% said they were vaccinated while only 1% said they weren't. The increase in the number of vaccinated people has had a positive impact on travel and gives reassurance for people to travel more to the countries that have high vaccination rates.

1- What was the main purpose for your last trip?



Respondents most expressed that visiting friends and family is paramount.

Forward look and Planning a trip

As more restrictions are eased worldwide, and vaccinations rates have increased, people are eager to travel more and make up for the lost time.

According to Wego, in 2022, flights and hotel searches increased by 81% in February and 102% in March. This is testament that people are looking to travel more.

2- Did you select a destination that was open to vaccinated travelers and didn't require a negative PCR test?



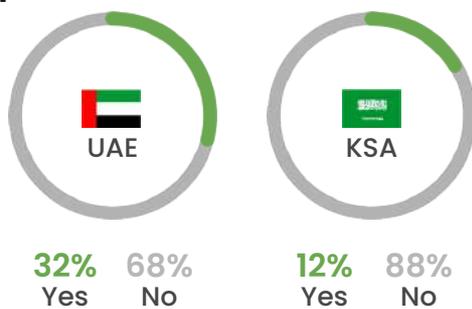
Lower risk destinations that guarantee an easy return have been prioritized. The majority of the respondents from Cleartrip's survey have opted for destinations which are perceived to be safe and where COVID-19 protocols have been adhered to.



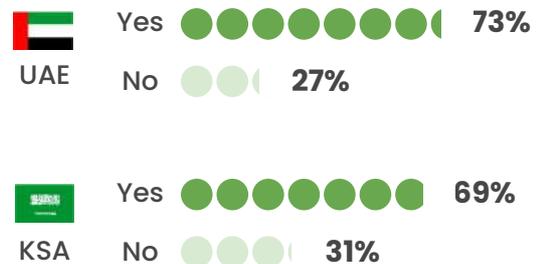
Airport experience

During these unusual times, airports across the globe have implemented necessary measures to ensure passenger safety. Travel experience has improved, however, it is still not as convenient as it used to be pre-COVID. Cleartrip's survey shows:

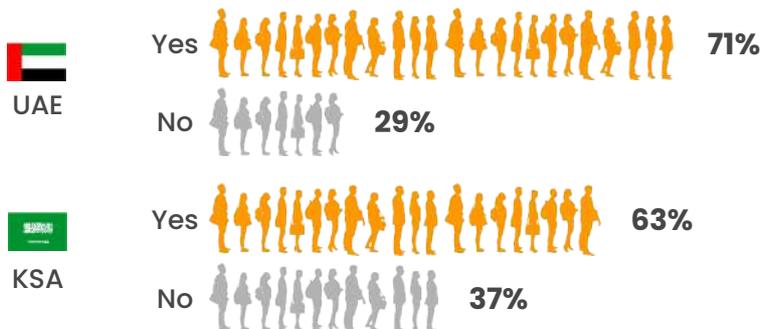
3- Were any additional documents required at the airport?



4- Did you spend more than 3 hours at the departure airport?



5- Did check-in at the airport take more time than usual?



Remote work & increase in hotel bookings

With more people continuing to work remotely in 2022, hotels are seeing a great demand regardless of seasonality. People can work from anywhere and are booking more hotel stays based on their new remote work destination.

As a result, Wego saw a spike in the number of searches in Q1 2022.

Holiday Homes

136%

Hotel Apartments

92%

Apartments

69%

The length of stay has increased by 19% in 2022 in comparison with 2021.

People are also opting for 5-star hotels who follow stricter measures and give them a safer travel experience. Wego saw an increase of 66% in searches for 5-star hotels

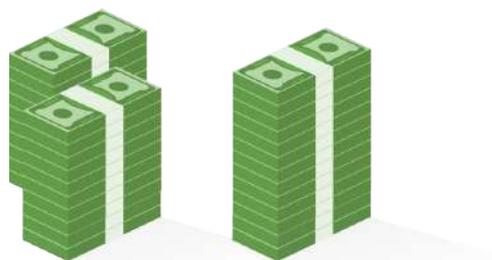


Trip Expenses & Likelihood to travel + Summer travel

6- Did you witness an increase in your trip expenses post-COVID-19?

79%
Yes

21%
No



79% of respondents from Cleartrip survey witnessed an increase in COVID-19 requirements, sore in ticket prices and unexpected circumstances leading to flight changes, which contributed to a 20% increase in their trip expenses post-COVID-19.

7- How likely are you to travel in the next 3 months?



78% of respondents are likely to travel and have trips planned, at least once in the next three months. The near-term outlook for travel looks favourable.

According to Wego's data, Summer 2022 will be all about long holidays and travelers will be spending more on leisure travel to make up for the lost time.

Popular destinations

Travellers are still aching to travel but additional factors are now considered while planning a trip. Destination cases, travel requirements and ease to move around all currently play a major role.

8 - Which destination are you planning to visit next for leisure?

As to the most popular destinations respondents plan to visit, the following look to remain tourism powerhouses.

UAE & KSA

Maldives

Georgia

Seychelles

United Kingdom

Turkey

Serbia



Average Airfares and average booking value 2022

Wego and Cleartrip see an increase in the average Airfares in 2022 compared to 2019.

UAE Outbound roundtrip

Yr	2019	2022	% change
AED	2064	2533	23%



The average round-trip fares to and from the UAE have increased by 23%

Region-wise Average Airfares:

MENA

MENA Outbound roundtrip

Yr	2019	2022	% change
AED	2156	2584	20%

Europe

Europe Outbound roundtrip

Yr	2019	2022	% change
AED	4185	5813	39%

SAARC (Excluding India)

SAARC Outbound roundtrip

Yr	2019	2022	% change
AED	1835	1928	5%

Round-trip airfares to the MENA region increased by

20%

Round-trip airfares to Europe increased by

39%

Round-trip airfares to South Asia increased by

5%

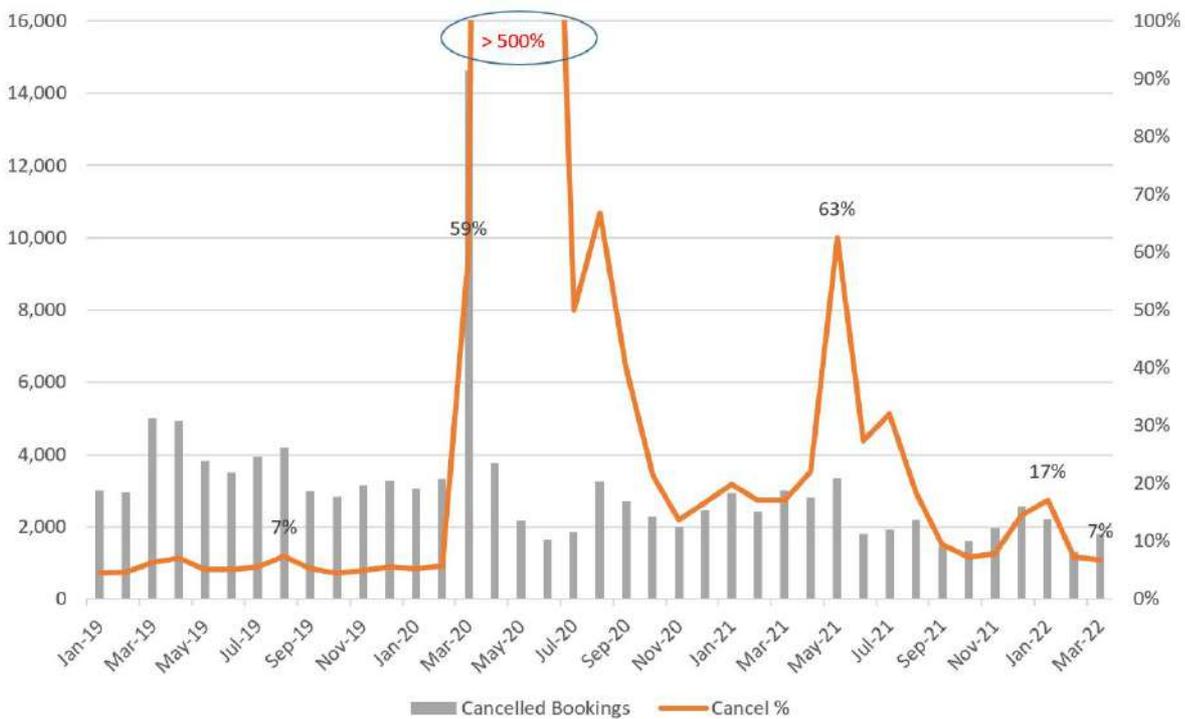
As per Cleartrip's data, for India specifically round-trip fares have witnessed a 21% increase as compared to 2019

Yr	2019	2022	% change
AED	1687	2043	21%

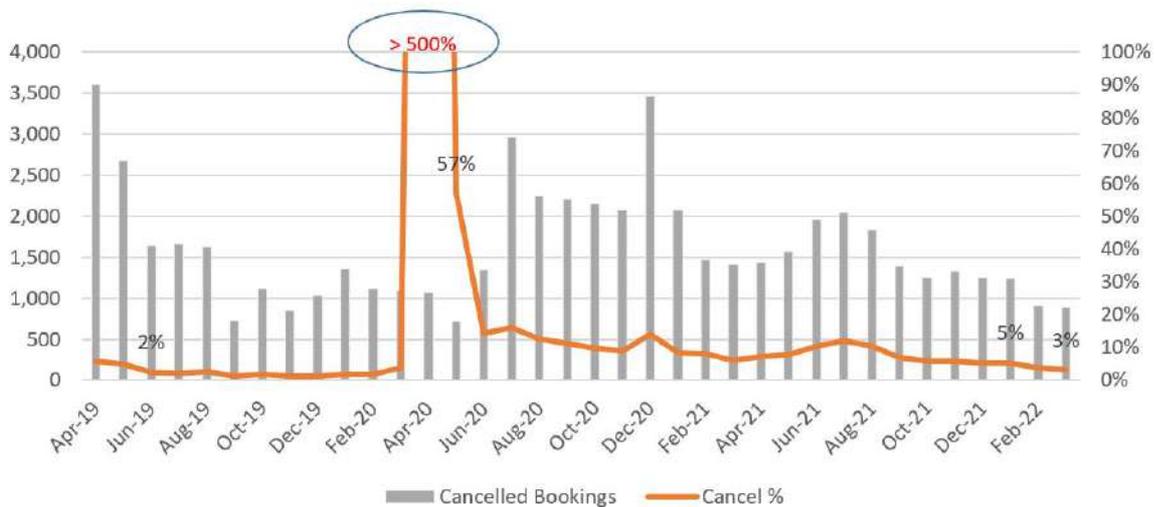
Cancellations

In the UAE, the average flight cancellations in 2019 were 6-7% pre-COVID-19. At the onset of the pandemic, the cancellations witnessed a considerable spike and were as high as 519% (During this period very few bookings were made coinciding with a large volume of cancellations from past bookings). In April 2021, the closure of the Asian corridor once again led to a rise in cancellations. However, in 2022 with travel recovering the cancellations are slowly moving back to pre-COVID-19 figures at 7-8%, with a small spike during the January to February wave. A similar trend was witnessed in the Saudi market.

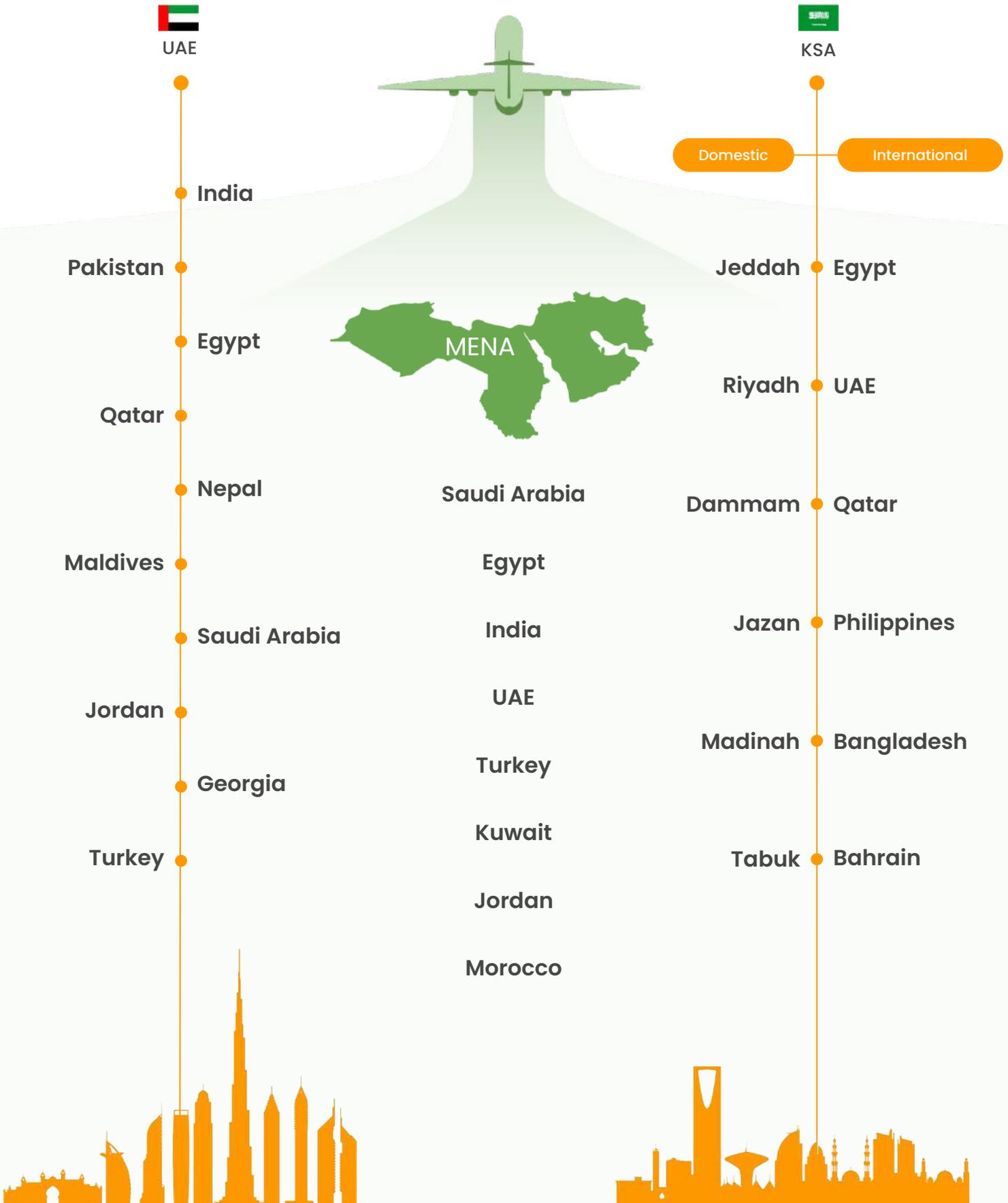
UAE



KSA



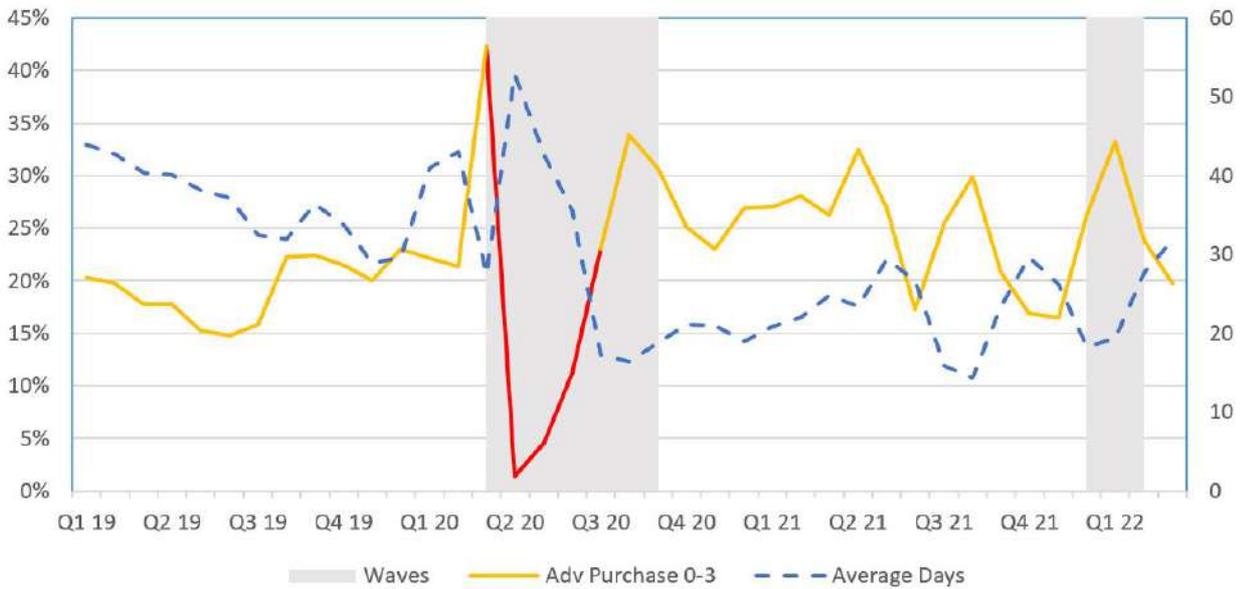
Most booked Destinations



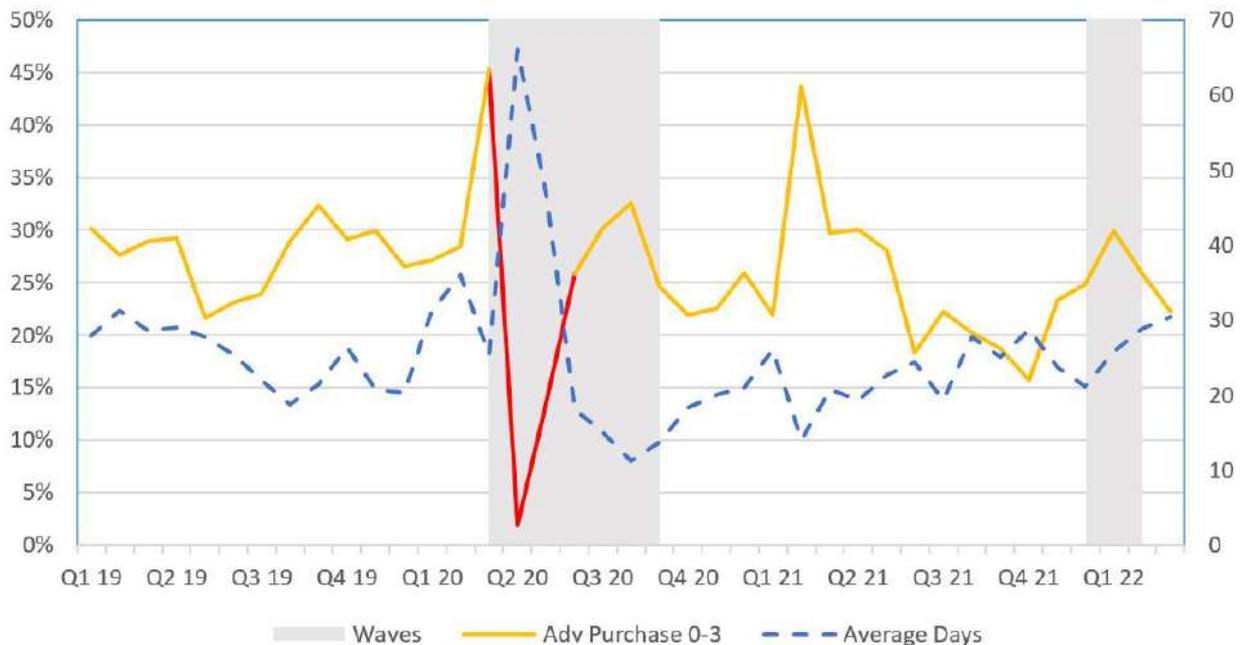
Advance purchase

The rise of the pandemic also showed a sudden spike in share of near-time bookings (0-3 days) and a steep drop in the average number of days between booking and the actual travel date. This was due to the unpredictable changes that COVID-19 brought from sudden border closures to heightened restrictions. In 2022, travellers are significantly more comfortable planning travel in advance after more streamlined processes have been put in place. Although subsequent waves at the end of 2021 did cause another spike in bookings made close to travel dates even with simplified travelling prerequisites.

UAE



KSA

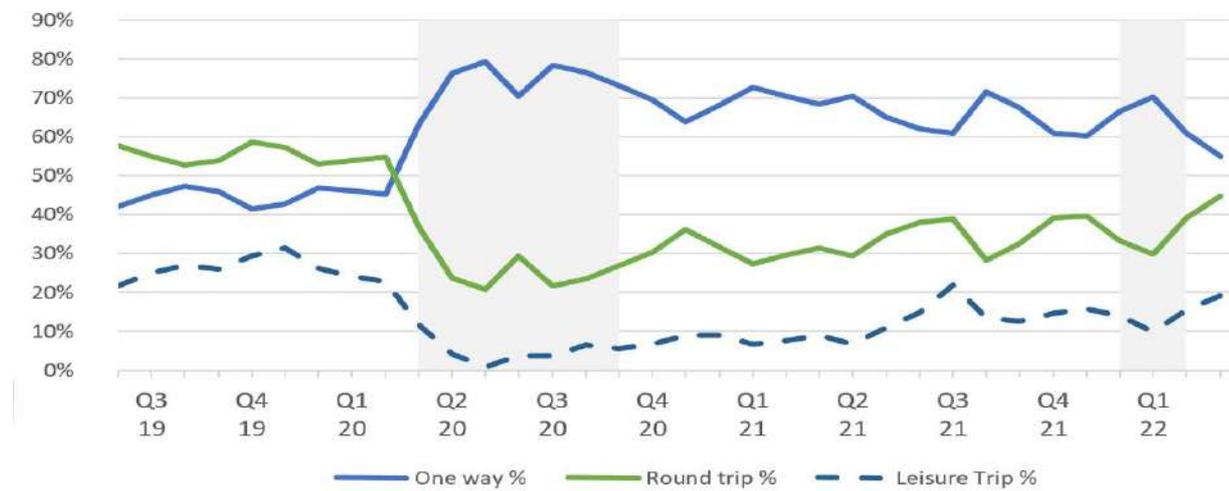


Journey type and leisure holidays

Stay duration

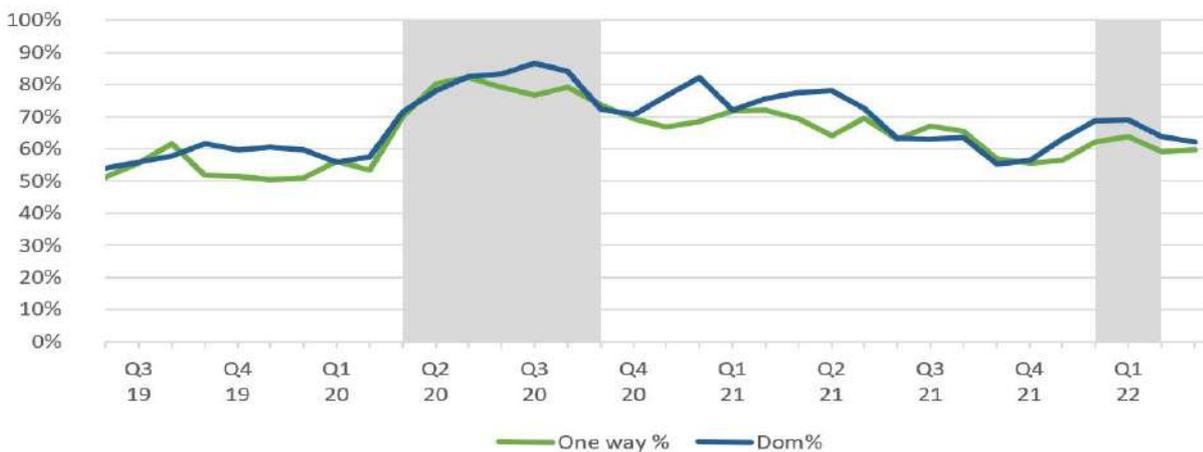
The pandemic brought out an increase of unpredictable scenarios and with expats readjusting their work and family plans, the proportion of one-way trips spiked during the early months of the pandemic. Cleartrip also saw a corresponding decline in round trips. Round trips and, more specifically, leisure travel, have rebounded significantly in the recent months.

UAE



KSA

The share of KSA Domestic travel has been observed to increase during periods of increased travel restrictions. Same trend has been observed for One Way trips.



Wego recorded over 65% increase in flight searches for leisure trips between Jan – April 2022 compared to the same period in 2021. Searches for hotels surged by 29% between Jan – April 2022 compared to the same period in 2021.

Trip duration

According to Wego, the overall trip duration has increased, and people are looking for longer trips.

4-7-day trips

Saw an increase of

100%

8-11-day trips

Saw an increase of

75%



Thank you

