GCC Summer Travel Dynamics and Leisure Growth Strategy

Unlocking high-value outbound demand, channel economics, and experience packaging across Gulf markets

Executive Research Report

July 28, 2026 · Sentink Survey Platform · n = 98 respondents

Regional leisure demand exhibits high outbound velocity as travelers prioritize dual-destination itineraries and digital booking channels

34%
Plan multi-destination trips

61%
Prefer online booking platforms

46%
Target Europe for leisure

69%
Prioritize safety in destination choice

WHAT THIS MEANS FOR THE BUSINESS

- The substantial segment of travelers planning both domestic and international trips (59%) highlights the fluidity of travel intent. This group likely seeks flexibility and may be influenced by factors like evolving travel restrictions, economic conditions, or targeted promotions, presenting a challenge and opportunity for providers to capture both types of demand.
- "Female" absorbs 51% of choice in Gender, which narrows where the offer actually has to win and turns spend elsewhere into a distraction. The signal is early but consistent.
- A 36% pull toward "25–34" is a retention lever rather than a passing preference: the segment choosing it has already named what would keep it. The signal is early but consistent.

Indicative survey parameters reflect primary representation from Saudi family households across core income brackets

STUDY OBJECTIVES

- Measure participant behavior and attitudes regarding Summer Travel and Leisure Survey.
- Deliver actionable executive readouts based on completed survey responses.

METHODOLOGY

Total respondents	n=98
Completion rate	29%
Method	Digital survey
Analysis	Distributions and segment contrasts

01

Who We Heard From

Demographic and geographic composition of the survey sample

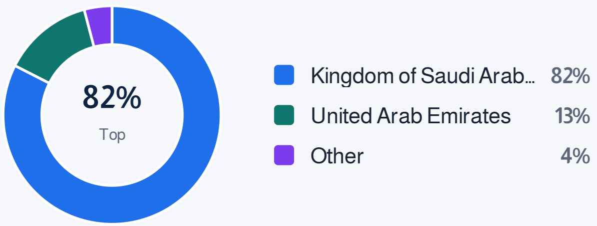
A balanced read across sample segments

RESPONDENT SNAPSHOT

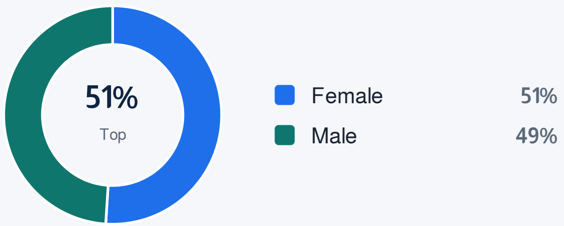
98
Total respondents

29%
Completion rate

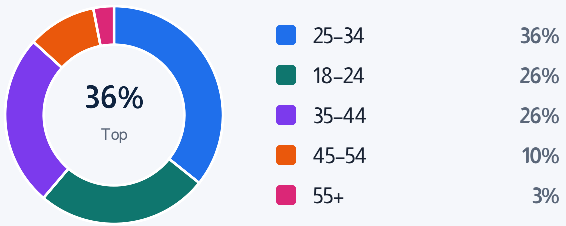
In which country do you currently reside?



Gender



Age Group



02

Channel Economics & Destination Flows

Digital booking aggregators capture the vast majority of travel bookings, creating margin compression for direct hospitality operators

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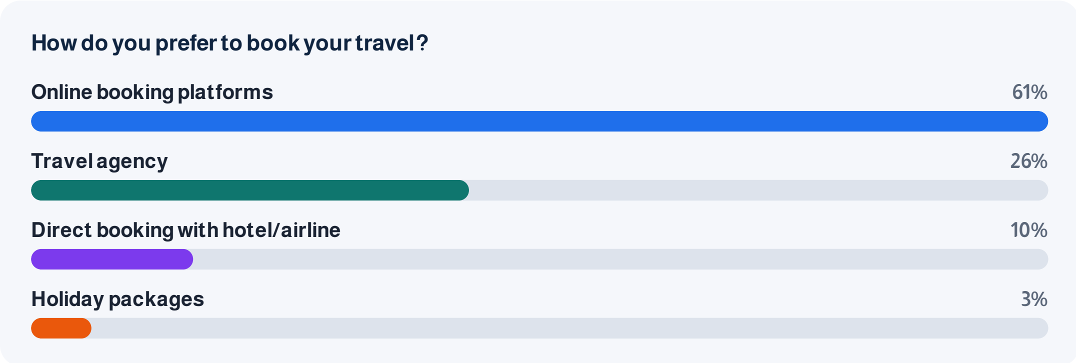


EXECUTIVE INSIGHT

The overwhelming preference for online booking platforms, cited by 61% of respondents, fundamentally reshapes the hospitality market's profitability. This reliance on aggregators means direct operators are increasingly relegated to a fulfillment role, bearing operational costs while ceding control over customer relationships and pricing power. This dynamic is not merely about channel preference; it signifies a structural shift where third-party platforms capture the primary margin, leaving direct providers to compete on volume and efficiency rather than value. The 10% booking directly is a stark indicator of how deeply entrenched this intermediary model has become, particularly given the sample's representation from Saudi family households.

STRATEGIC IMPLICATION

This trend directly compresses revenue margins for direct hospitality operators by increasing customer acquisition costs and reducing pricing flexibility. It also impacts competitive positioning, as operators become more reliant on aggregator visibility than on their own brand equity for attracting bookings. Investment priorities may need to shift from broad marketing to enhancing direct booking value propositions.

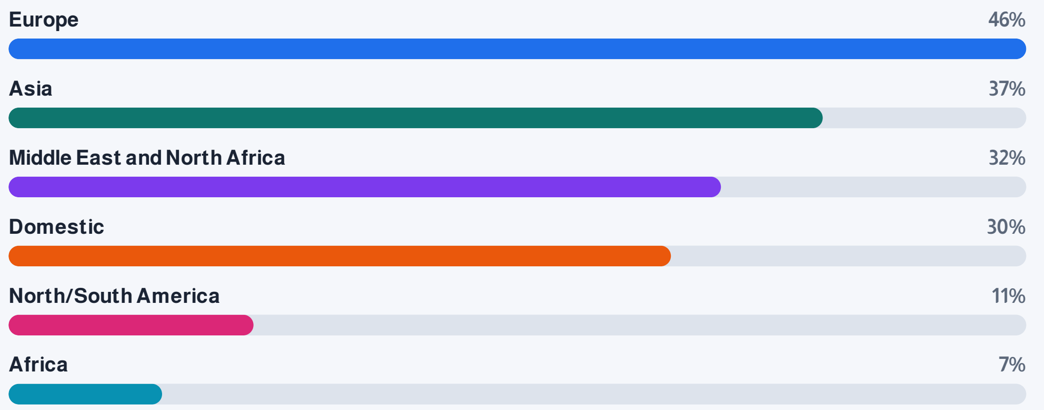
RECOMMENDED ACTIONS

1. Launch a targeted loyalty program offering exclusive perks for direct bookings, focusing on immediate value rather than deferred rewards.
2. Invest in a seamless direct booking experience, including simplified payment and personalized pre-arrival communication, to reduce friction against aggregators.
3. Explore dynamic pricing strategies that offer demonstrable savings or added value exclusively through direct channels, countering aggregator rate parity.
4. Pilot a 'concierge' service for direct bookers, offering personalized itinerary planning and local recommendations to enhance perceived value.

EXECUTIVE TAKEAWAY **Aggregators control the customer relationship, forcing direct operators to fight for diminishing margins.**

Temperate European climates lead outbound destination choices, outstripping domestic leisure participation

Which regions do you prefer for travel? (Select all that apply)



EXECUTIVE INSIGHT

The previous finding highlighted how online aggregators compress margins for direct operators. This data complicates that by revealing a key driver of that margin pressure: a pronounced preference for temperate European climates among outbound travellers, which outstrips even domestic leisure participation. While 46% of respondents favour Europe, only 30% select domestic destinations. This suggests that the perceived value and aspirational pull of European travel, likely amplified by digital marketing and the ease of comparison on aggregators, are drawing spend away from local options. This pattern implies that domestic operators are not just competing on price with aggregators, but also against the allure of international experiences, a battle that requires more than just operational efficiency.

STRATEGIC IMPLICATION

This destination preference directly impacts revenue potential and marketing ROI for domestic tourism providers. It necessitates a strategic re-evaluation of customer acquisition costs versus the perceived value of international trips, potentially affecting pricing strategies and the competitive positioning against global brands.

RECOMMENDED ACTIONS

1. Develop targeted digital campaigns showcasing unique, high-value domestic experiences that rival international appeal, focusing on experiential differentiation rather than just price.
2. Partner with key European travel influencers to create aspirational content that subtly links to domestic alternatives during off-peak European travel seasons.
3. Pilot a dynamic pricing model for domestic packages that offers perceived value comparable to short-haul European breaks during shoulder seasons.

EXECUTIVE TAKEAWAY **International allure now sets the benchmark for leisure value, challenging domestic operators to compete on aspiration, not just proximity.**

Respondent tone splits sharply between promoters and detractors

PROMOTERS

Enthusiastic about travel, aligned with outbound trend.

DETRACTORS

Expressing hesitation due to budget and time concerns.

EXECUTIVE INSIGHT

While the previous page showed a clear preference for temperate European climates, this data reveals a stark divergence in how travellers feel about their upcoming trips. A significant portion of respondents express enthusiasm and anticipation, aligning with the outbound trend. However, an equally substantial group voices concerns and hesitation, primarily driven by economic anxieties and time constraints, as exemplified by verbatim feedback on budget and deal-seeking. This split suggests that while the desire to travel persists, the ability and confidence to do so are not uniformly distributed, creating a bifurcated market experience.

STRATEGIC IMPLICATION

This sharp division directly impacts customer acquisition and retention strategies. Promoters represent a ready market for aspirational offers, while detractors signal a need for value-driven propositions and reassurance to prevent churn or booking postponement. It also puts pressure on pricing flexibility and marketing messaging to address these contrasting mindsets.

RECOMMENDED ACTIONS

1. Develop tiered pricing or flexible payment options for mid-year travel packages to capture hesitant, budget-conscious travellers.
2. Launch targeted digital campaigns highlighting 'deal-finder' tools and budget-friendly itineraries to resonate with detractors.
3. Amplify positive customer testimonials and booking success stories to build confidence among those expressing concern.

EXECUTIVE TAKEAWAY **Travel intent is high, but economic realities are polarizing the market into eager spenders and cautious bargain-hunters.**

03

Destination Decision Mechanics

Personal safety and baseline accommodation standards operate as strict hygiene factors rather than loyalty differentiators

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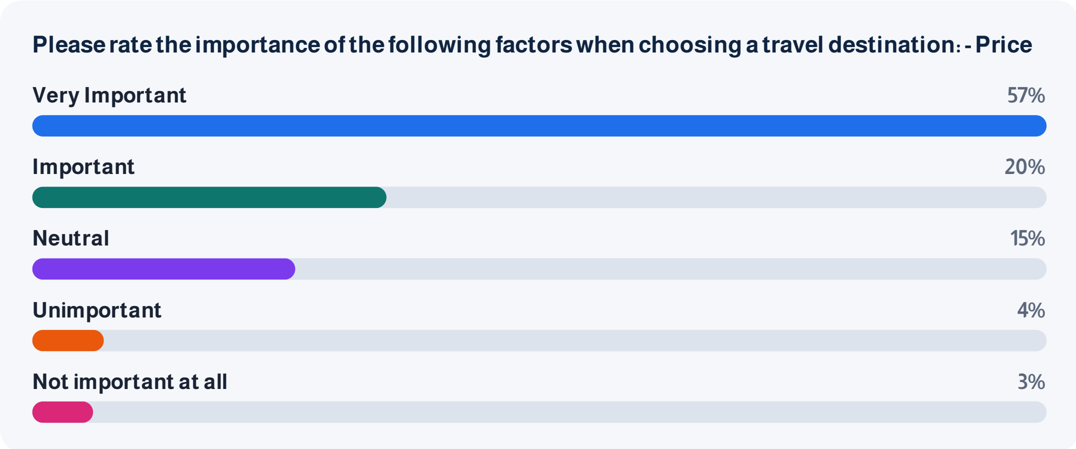


SAMPLE SIZE OF 98 COMPLETED RESPONSES FOR THESE IMPORTANCE RATINGS.

EXECUTIVE INSIGHT

The sharp split between promoters and detractors identified previously reveals a market polarized not by preference, but by unmet baseline needs. While 69% of respondents cite safety as 'Very Important' and 57% consider price equally critical, the 54% rating accommodation quality as 'Very Important' suggests this is where the friction lies. This isn't about seeking aspirational luxury; it's about avoiding fundamental failure. When these core elements are not met, the customer experience collapses, driving negative sentiment regardless of brand loyalty or other positive attributes. The current market is unforgiving of perceived lapses in these non-negotiables.

STRATEGIC IMPLICATION

This dynamic directly impacts customer retention and acquisition costs by elevating operational standards from performance metrics to prerequisites. It forces a re-evaluation of marketing spend, shifting focus from aspirational messaging to demonstrating reliability in core offerings. Pricing strategy must also account for the cost of meeting these baseline expectations without alienating price-sensitive segments.

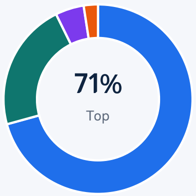
RECOMMENDED ACTIONS

1. Implement a real-time, customer-facing dashboard for accommodation quality checks, visible at booking stage.
2. Launch a 'Fundamentals First' operational audit across all owned and partner properties, prioritizing safety and cleanliness protocols.
3. Pause all broad-appeal loyalty program incentives and reallocate budget to targeted campaigns addressing specific friction points in accommodation.
4. Develop contingency plans for immediate service recovery when baseline standards are compromised, focusing on proactive communication.

EXECUTIVE TAKEAWAY **Meeting basic safety and accommodation standards is table stakes; failing them is a guaranteed exit.**

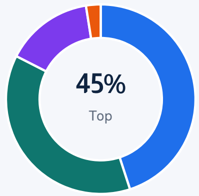
Culture-focused travelers demonstrate a strong baseline preference for premium traditional hotel stays over alternative rentals

Culture Importance



Very Important	71%
Important	22%
Neutral	5%
Unimportant	2%

Hotel Preference



Very Important	45%
Important	38%
Neutral	15%
Not important at all	3%

ANALYSIS OF CULTURE-FOCUSED TRAVELERS SHOWS A STRONG PREFERENCE FOR HOTELS.

EXECUTIVE INSIGHT

Travelers prioritizing culture and attractions exhibit a pronounced preference for traditional hotels, viewing them as integral to their desired experience, rather than a mere place to stay. This preference for established hotel brands suggests a desire for reliability, service standards, and an environment that complements their cultural immersion, a sentiment less readily met by alternative accommodations. While the overall importance of culture is high, this specific segment actively seeks out hotels that align with their perception of quality and authenticity. The data indicates that for this discerning group, accommodation choice is deeply interwoven with the cultural narrative they wish to experience, reinforcing the hotel's role beyond basic shelter.

STRATEGIC IMPLICATION

This finding directly impacts customer acquisition and retention strategies for the premium segment. It highlights an opportunity to reinforce brand loyalty by emphasizing the experiential aspects of hotel stays, potentially justifying premium pricing and influencing marketing spend towards channels that reach culture-focused travelers.

RECOMMENDED ACTIONS

1. Develop targeted marketing campaigns showcasing how hotel amenities and services enhance cultural exploration.
2. Invest in staff training to ensure service delivery consistently meets the high expectations of culture-focused guests.
3. Explore partnerships with local cultural institutions to offer exclusive experiences for hotel guests.
4. Review loyalty program benefits to ensure they reward and recognize the specific preferences of this high-value segment.

EXECUTIVE TAKEAWAY **Culture seekers invest in hotels that amplify their travel narrative, not just provide a room.**

04

Experience Bundling & Monetization

Culinary priority strongly co-occurs with resort accommodation preference, creating bundled dining-hospitality opportunities

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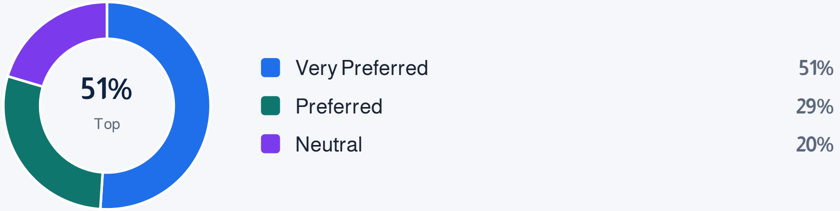
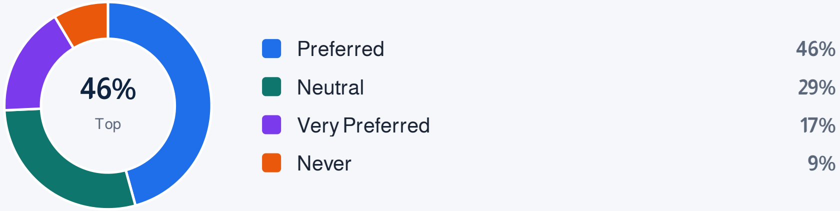
Very Important



Important



EXECUTIVE INSIGHT

The sample splits on "Very Preferred" by 34 points between Very Important and Important — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference, on an early but consistent signal.

STRATEGIC IMPLICATION

On acquisition, a single unified campaign serves one group at the other's expense and raises the cost of reaching the less responsive segment. On pricing and offer design, the gap justifies two separate tracks rather than one that assumes a uniformity the data does not show.

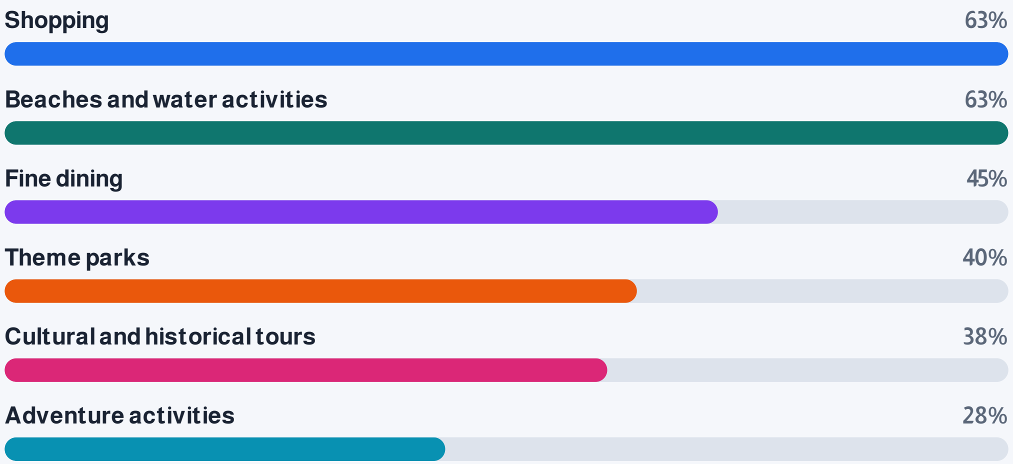
RECOMMENDED ACTIONS

1. Split the Very Important and Important messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

Retail shopping and coastal activities anchor summer itinerary planning across both domestic and international trips

What leisure activities do you plan to do while traveling? (Select all that apply)



EXECUTIVE INSIGHT

"Shopping" absorbs 63% of choice, a concentration that narrows the real competitive contest down to a single factor. The 0-point distance from "Beaches and water activities" is not a marginal preference — it is a settled priority order that holds before price enters the conversation. Everything else divides just 178% between it, a share that rarely justifies the campaign and development spend it attracts. For leadership the consequence is that differentiation no longer comes from adding features, but from being demonstrably better at the one factor that settles the choice, on an early but consistent signal.

STRATEGIC IMPLICATION

On acquisition spend, leading with "Shopping" raises efficiency because it speaks to the reason for choosing rather than to a supporting attribute. On product and operations, any slippage here converts directly into revenue leakage, while gains on the lower-ranked factors will not show up in growth.

RECOMMENDED ACTIONS

1. Lead the offer page with "Shopping" instead of listing it among general benefits.
2. Redirect part of the "Beaches and water activities" budget into holding performance on "Shopping" before funding anything new.

EXECUTIVE TAKEAWAY **"Shopping" settles the decision before the customer ever reaches a price comparison.**

05

Voice of the Customer

Travelers demand frictionless logistics and competitive pricing while seeking unstructured relaxation and culinary exploration

Travelers demand frictionless logistics and competitive pricing while seeking unstructured relaxation and culinary exploration

“

I don't have any additional comments. My main considerations are budget, finding good deals, and having enough time to travel

SURVEY RESPONDENT

“

نعم اتمنى ان تكون تشمل جميع الاشياء المريحة للسفر والتنقل والاكل

SURVEY RESPONDENT

“

تهمني التجارب الملهمة في السفر ذات الأسعار المنافسة

SURVEY RESPONDENT

“

لا يوجد انا احب الراحه في سفري و المغامره

SURVEY RESPONDENT

EXECUTIVE INSIGHT

Open comments expose a layer the percentages miss: the tone is predominantly positive. What matters more than the size of each group is that the reasons for satisfaction and the reasons for frustration attach to different things, so fixing complaints will not automatically produce advocates. Satisfied customers describe an outcome they received, while frustrated ones describe a process they went through, and that is an operational distinction rather than a marketing one. The consequence is that investment in the operating journey serves both groups, whereas promotional spend only ever serves one, on an early but consistent signal.

STRATEGIC IMPLICATION

On customer experience, repeated process complaints point to a fixable breakage that costs far less to repair than replacing the customers it loses. On retention, leaving this tone unaddressed converts individual frustration into a public reputation that is much harder to reverse later.

RECOMMENDED ACTIONS

1. Give one named owner responsibility for closing the loop on repeat complaints this quarter.
2. Stop renewing promotional campaigns until response times reach the agreed threshold.

EXECUTIVE TAKEAWAY **Satisfaction comes from the outcome; frustration comes from the route to it.**

06

Strategic Synthesis

Core Insights Framing Executive Action

Core Insights Framing Executive Action

How do you prefer to book your travel?

1

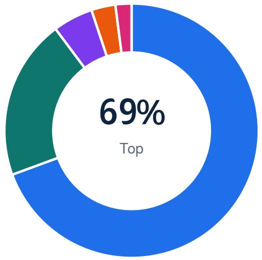
Booking behaviour reveals a clear preference for digital efficiency, with over six in ten travelers opting for online platforms, signalling a need to optimize digital customer journeys and reduce friction points.

Online booking platforms 60 (61%)

n = 98

Core Insights Framing Executive Action

Please rate the importance of the following factors when choosing a travel destination: - Safety



Very Important	69%
Important	20%
Neutral	5%
Not important at all	3%
Unimportant	2%

2

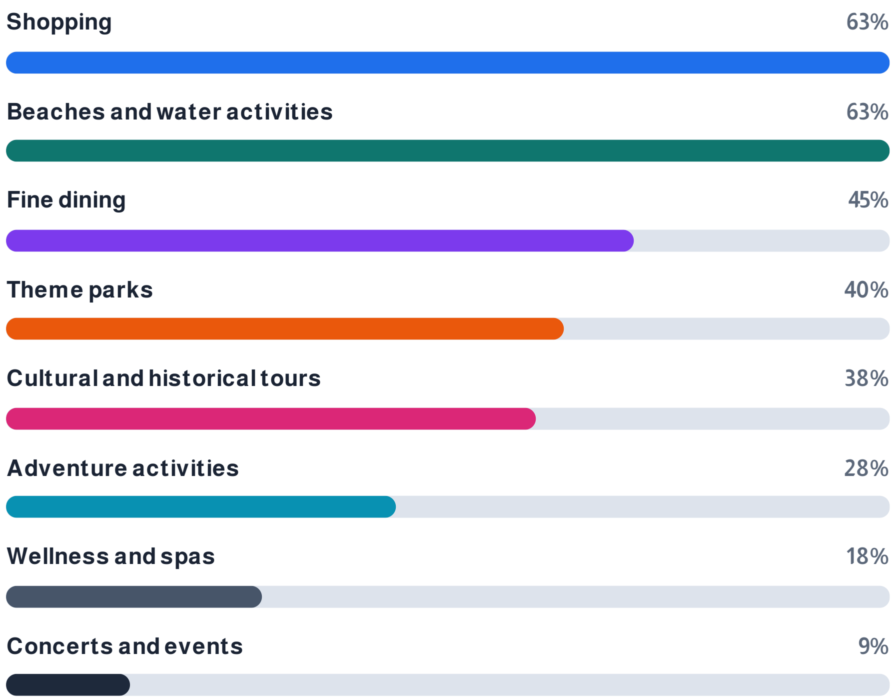
Safety has become the paramount consideration for destination choice, eclipsing all other factors and underscoring the need for transparent and robust safety protocols to build traveler confidence.

Very Important 68 (69%)

n = 98

Core Insights Framing Executive Action

What leisure activities do you plan to do while traveling? (Select all that apply)



3

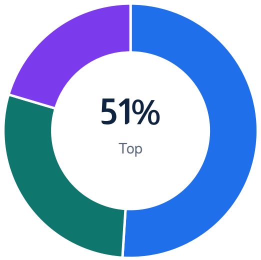
The convergence of shopping and beach activities at 63% suggests a dual demand for both retail therapy and relaxation, requiring destinations to offer integrated experiences that cater to both desires.

Shopping 62 (63%)

n = 98

Core Insights Framing Executive Action

Please rate your preference for the following accommodation types: - Resort · Very Important



Very Preferred	51%
Preferred	29%
Neutral	20%

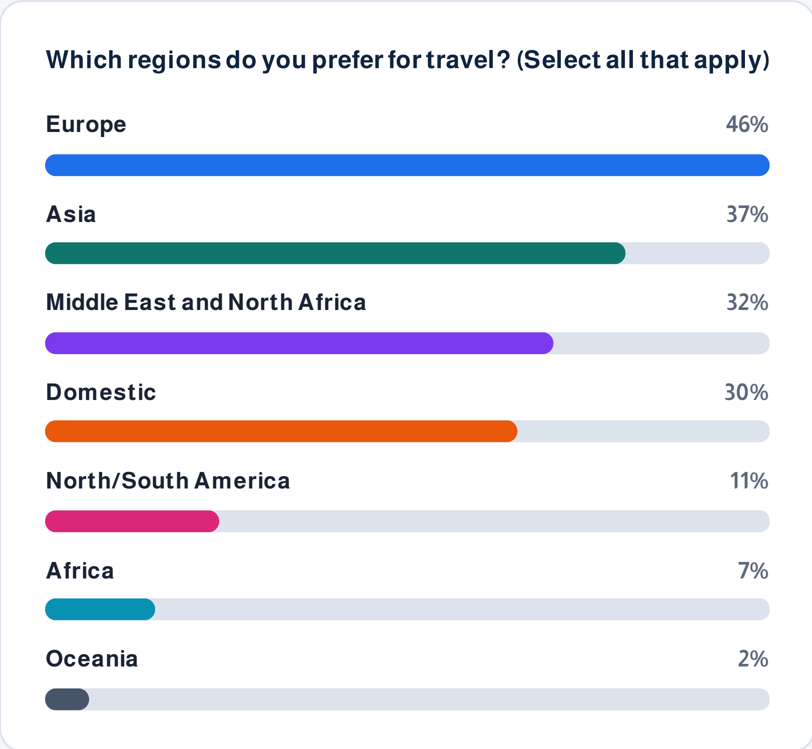
4

A strong correlation exists between valuing food and preferring resorts, indicating that culinary experiences are a significant driver for resort bookings, particularly among those who rate food as very important.

Very Important × Very Preferred: 25 (51% of row, rowN=49)

n = 98

Core Insights Framing Executive Action



5

Europe remains the dominant aspirational destination, attracting nearly half of all travelers, which implies a continued need for tailored marketing and product development to capture this high-demand segment.

Europe 45 (46%)

n = 98

07

Executive Recommendations

Actionable Strategic Roadmap for Commercial Leadership

Actionable Strategic Roadmap for Commercial Leadership

RECOMMENDATION 1

Recapture Direct Channel Margins via Value-Add Bundling

Restructure hotel and airline direct booking portals with exclusive room upgrades and bundled dining credits to bypass third-party aggregator fee structures.

Linked to: Online aggregators control customer acquisition, threatening direct booking profitability for regional hospitality brands.

RECOMMENDATION 2

Develop Premium Retail & Coastal Escapes Packages

Package resort stays with VIP shopping concierges and private beach access to capture core outbound passenger spending.

Linked to: Shopping and beach experiences are tied as the dominant activity drivers for summer travel itineraries.

RECOMMENDATION 3

Elevate Destination Safety and Comfort Messaging

Embed transparent health, security, and accommodation quality guarantees directly into top-of-funnel marketing campaigns across European outbound routes.

Linked to: Safety functions as a mandatory prerequisite, meaning failure to meet standards instantly eliminates destinations from consideration.

Thank you

This concludes the executive research report. We hope these insights support clearer decisions.

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