

Pulse check

In our survey of UAE residents, as many as six out of ten (57%) interviewees had flown outside the country in the past 12 months. Local airline customer service and hygiene standards seem to have been robust. Nine out of ten (89%) of these respondents expressed satisfaction with their travel experience, from booking their flight to arrival at their destination.

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of interviewees had flown outside the country in the past 12 months.



Kith and kin

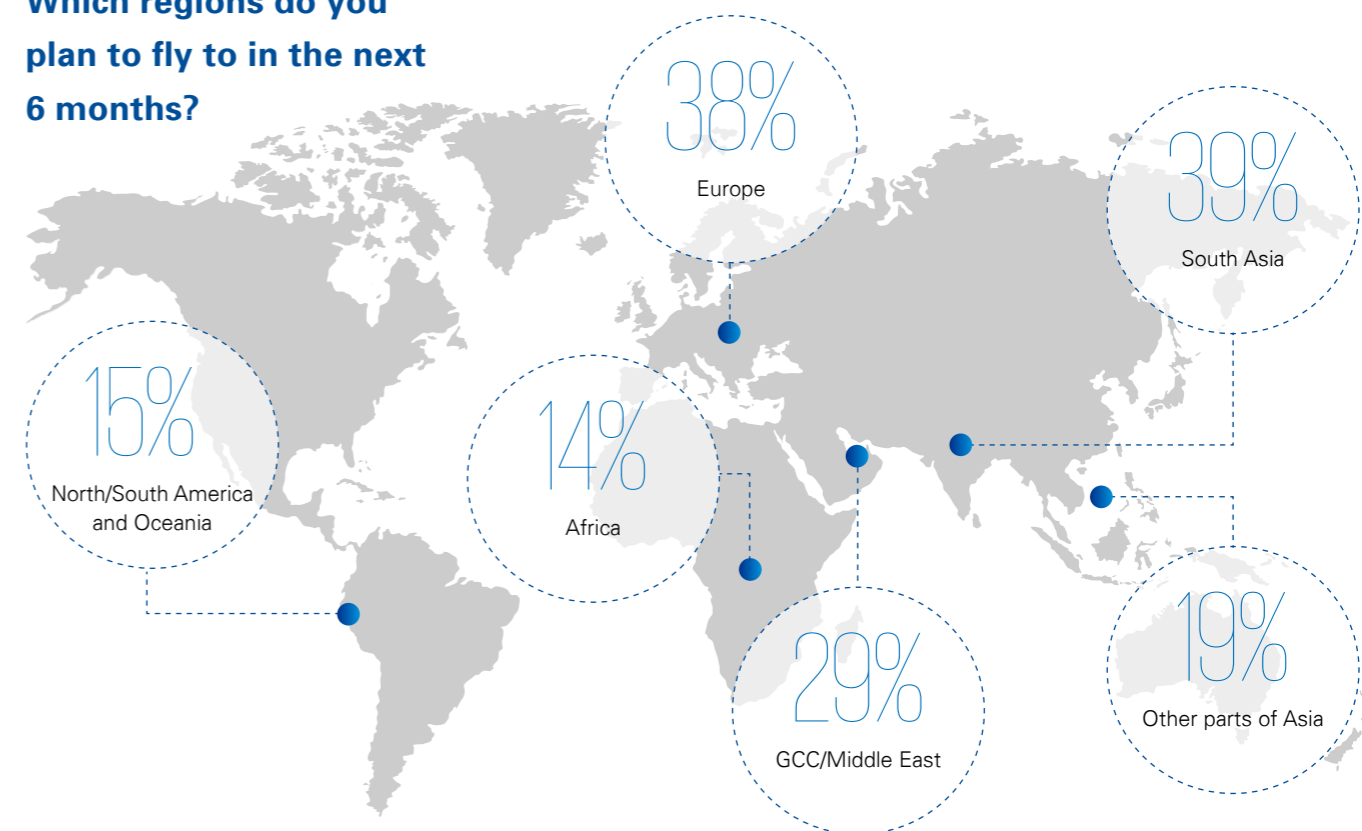
The main reason for travel was, overwhelmingly, to travel to their home country and/or to visit friends and relatives (VFR), followed by leisure travel. The UAE's predominantly expat population means most residents have relatives in other countries. (Across numerous regional destinations, VFR constitutes the largest or second-largest form of travel. Definitions vary: travelers may state VFR for their purpose of visit but that does not necessarily

mean they are staying with those friends/relatives. They may be accommodated by friends/relatives but have a different purpose of visit.

Reflecting the country's demographics, the most frequently visited destination over the last year was South Asia (40%), followed by the Gulf Cooperation Council (GCC) (30%) and Europe (27%). Family bonds appear to take precedence over foreign holidays.

Meanwhile, South Asia (39%) and Europe (38%) tied as the regions that respondents are keen to visit in the coming six months. It is probable that the lower figure for Europe as a destination of choice over the past year, compared with its prominence on travelers' wish-lists for the future, was due to stricter Covid-19 related restrictions in that region.

Which regions do you plan to fly to in the next 6 months?



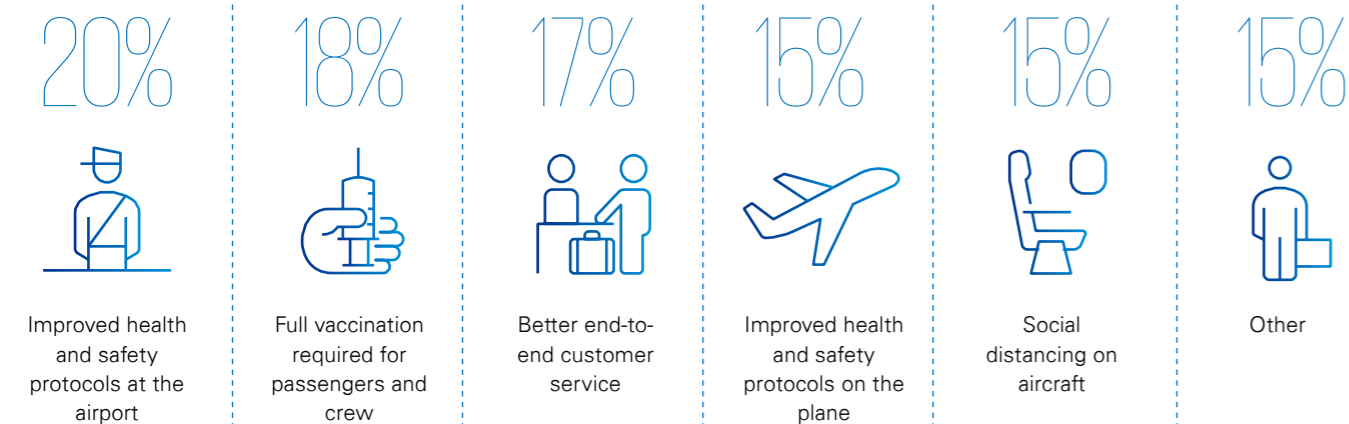
A holiday on the horizon

It seems that consumers are eager to enjoy a vacation after an arduous year and a half. Queried about how long they would wait if the travel destination declared the virus contained, an overwhelming three-quarters (74%) of respondents said they would travel within the next six months, with only 11% waiting for a year or longer.

This appears contingent, however, on airports and airplanes continuing to maintain stringent health standards. When asked what steps would prompt potential travelers to fly more frequently, they declared they were seeking improved health and safety protocols at the airports, full vaccination for passengers and crew, social distancing, as well as better end-to-end customer service.

Other less important factors included Covid-19 testing being easily accessible and more affordable, Covid-19 travel measures like mask requirements being removed, readily available treatment for Covid-19, and comprehensive health insurance being available at the destination.

What is the most important factor that would prompt you to fly more frequently?



The main reason respondents did not want to travel in the past 12 months was simply that they did not need to, followed by the fact that the borders of the countries they wanted to travel to were

closed. The third and fourth most frequently offered explanations, respectively, were that they were worried about contracting Covid-19 away from home and wanted to get vaccinated first. This indicates

travelers are increasingly taking responsibility for their own health. Other factors included quarantine restrictions discouraging travelers, and concern about the welfare of their family and friends.

What was the most important factor influencing your decision not to travel?



This caution was exercised equally strongly when interviewees were asked how worried they were about contracting Covid-19 through air travel, with 75% of all respondents replying in the affirmative.

Customers have generally remained loyal to their choice of airline.

Over half (56%) of interviewees' airline choice has not changed since the outbreak of Covid-19. For those whose preferences had changed, the most common factors contributing to their decision were: health and safety protocols, cost and availability of flights. This

indicates Covid-19 remains an inescapable decision-making factor.

Other reasons included customer service, recommendations from others, having better inflight service, and frequent flyer programs.

Choose the factor that most influenced your change in airline preference.



Down to business

As the economy begins to right itself, the corporate world is also gradually returning to the 'old normal'. An overwhelming 71% of respondents believed that despite the generally adopted online platforms, corporate travel will be necessary for meetings in the future. An even higher percentage (81%) believe corporate travel will be justifiable for events like exhibitions and conferences.

That does not mean, however, that the pandemic has not wrought significant change. Consumers believe Covid-19 will leave an indelible mark on companies' approach to business travel. The majority of respondents (71%) foresee a switch in business class travel (to economy) due to changes in company budgets caused by the pandemic.

It also seems that restrictions and precautionary measures are here to stay for the long term. Eight out of ten (78%) predict that company policy will dictate which countries their employees can and cannot fly to. And three quarters (74%) believe employers will impose additional quarantine conditions upon return from international travel.

Given the generally adopted virtual method of conducting business meetings (i.e. Zoom, MS Teams), do you think corporate travel for meetings will be necessary or justifiable?

71% Agree

29% Disagree

Medical tourism

Only 5% of respondents who travelled by air over the past year did so for medical tourism; a figure which remains consistent for the proportion planning to travel in the next six months. This figure may seem fairly low, but our

survey was of UAE residents who generally do not need to travel outside the country to benefit from the country's high standards of healthcare.

Given the country has cemented itself as a front-runner in this

segment, inbound air travel for medical tourism, therefore, would likely be a much higher proportion.



Key areas of concern

We asked our interviewees to indicate how worried they were about each stage of the travel experience—regardless of whether they had travelled in the past few months, or were planning to in the near future.

Would-be travelers appeared to be most fearful of the risks associated with the plane journey, with three-quarters (74%) expressing reservations. Seven in ten (68%) respondents acknowledged the need to exercise vigilance when

conducting tourist activities at their destination. The third most-cited area of concern was the airport, at 66%.

In relation to Covid-19, how worried are you about each of the following aspects of the travel experience?

