CUSTOMER EXPERIENCE

for an entire country

A Case Study

SAUDI
TOURISM
AUTHORITY

الهيئة
السعودية
للسياحة

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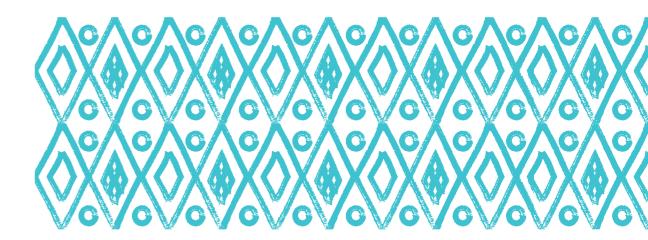**Executive Director**

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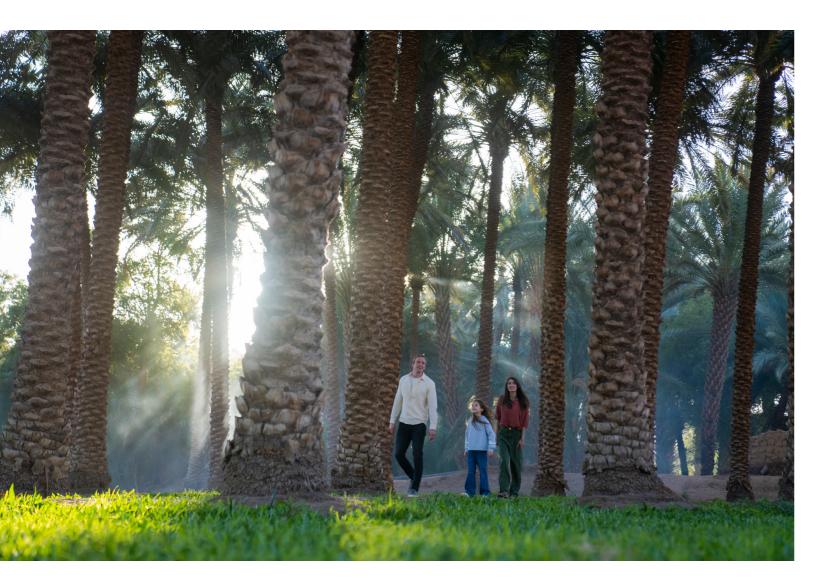## NIKOLA JURISIC

Culture Transfiguration Catalyst

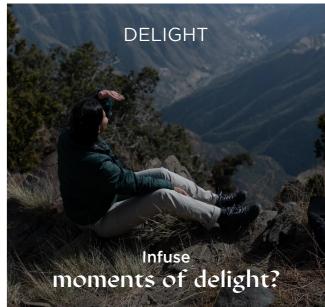*Transfiguration Advisory*

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It is not uncommon to find case studies for **Customer Experience (CX)** programs conducted in coffee shops, airlines, theme parks and everything in between. Although, It Is rare to find a manual or benchmark for CX on a scale once deemed unimaginable - with all the complexity it entails. Therefore, **Saudi Tourism Authority (STA)** are pioneering the next frontier of CX... for an entire country! We believe this case study offers fascinating Insight and learnings useful for practitioners and enthusiasts of Customer Experience with principles relevant for almost any destination, sector, or organization.

The Kingdom of Saudi Arabia opened its doors in **2019**, welcoming visitors from around the world with the slogan **"Saudi – Welcome to Arabia"** with the launch of the first ever e-visa for leisure visitors and a bold plan for its nascent tourism sector. Among the countless bold 'firsts' that this plan included was the possibility of trying what had never been done before. This case study looks at one of those 'firsts' – looking at the customer experience beyond the micro and expanding it to become a new benchmark on a mega scale and pioneering the next frontier of **CX... for an entire country.**

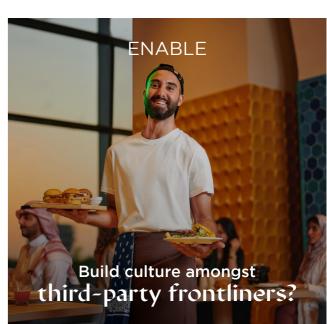Though some pressing questions quicky surfaced, such as **"HOW MIGHT WE...":**

DESIGN

Group around
visitor preferences?

DELIGHT

Infuse
moments of delight?

MEASURE

Operationalize around
impact?

ENABLE

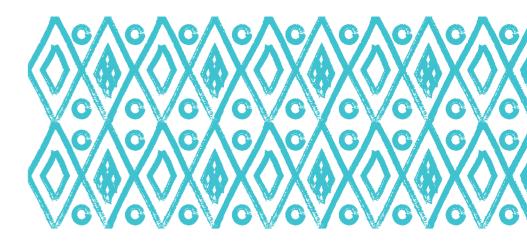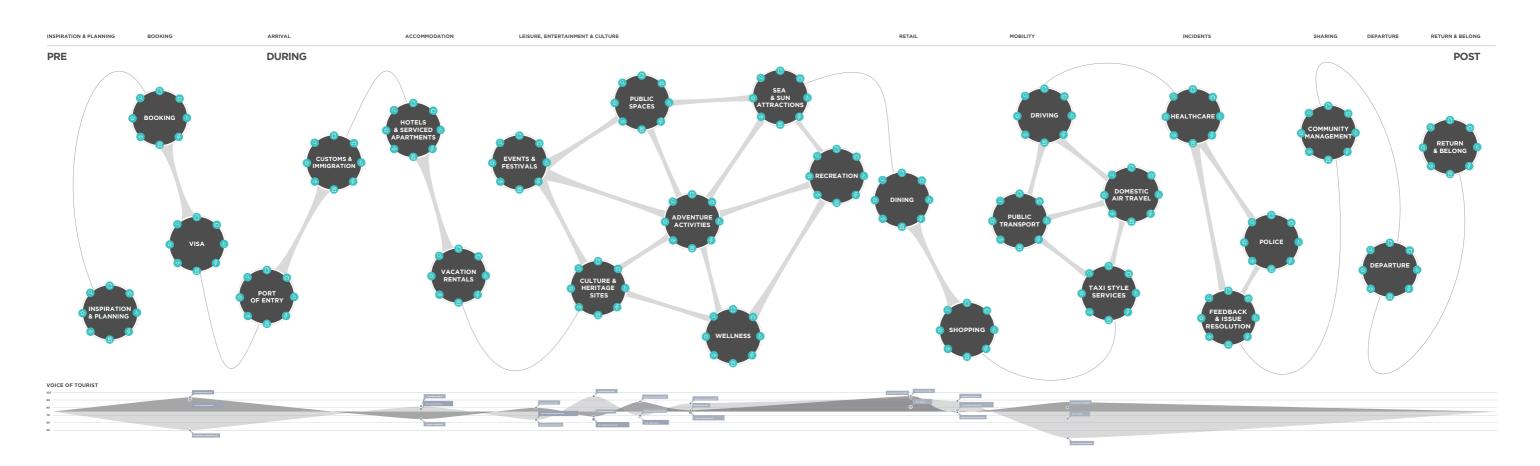Build culture amongst
third-party frontliners?

This steep learning curve resulted In the Visitor Experience team, established at the heart of **Saudi Tourism Authority (STA)"**, launching a pioneering nation-level approach to visitor experience management grounded in robust data and paying close attention to the voice of the traveler, triggering tangible results for the tourism ecosystem.

Step one to achieving this pioneering aspiration was to understand and cover all aspects of the journey – from before arrival to beyond departure. The result expanded the journey far beyond just services and information. The emotional experience of our guests and the role of destinations in creating long-term memories were put at the center.

ILLUSTRATIVE

INSPIRATION & PLANNING   BOOKING &   ARRIVAL   ACCOMMODATION   LEISURE, ENTERTAINMENT & CULTURE   RETAIL   MOBILITY   INCIDENTS   SHARING   DEPARTURE   RETURN & BELONG

PRE   **DURING**   **POST**

VOICE OF TOURIST

In October **2019**, this map was reviewed by the leadership of Saudi, providing confidence in our holistic approach and informing our trajectory.

This version of the case study
covers the inception phase from

JUNE 2019 - JANUARY 2022

This case study captures the Visitor Experience team's visitor-centric approach in a modular study that illustrates the 'hows' of building **CX** (Customer Experience) **for an entire country** in four parts – **Design, Delight, Measure** and **Enable**. We worked with our partners to consolidate both our learnings and results to date in each module.

The **Design module** looked at how to group around visitor preferences and dives into the methodologies used, in the **Delight module** we answered the question of defining and infusing moments of delight, the **Measure module** handled the approach we took to operationalizing a measurement system and finally the **Enable module** focused on creating a national tourism service standard and frontliner brand that Is deeply rooted in the beauty and strengths of Saudi culture, heritage and customs.

Our objective for this case study is to create a living resource that is periodically revisited to support our partners in both the public and private sectors, to inform, inspire and reimagine the way projects can be conceived and delivered across breadth of the Saudi Tourism sector. This version of the case study predominately covers the inception phase from June **2019** to January **2022**.

It is also our commitment to sharing our ever-evolving insights with the wider community that can act as a practical resource guide and reinforces **STA**'s commitment to ongoing learning.

This case study is particularly helpful for **CX** practitioners (whether It be a small business, complex **CX** projects & programs In the public and private sector, or even an entire destination or economy), HR practitioners (in particular Chief Culture Officers), learning and development professionals, culture leaders and experts, and practitioners in marketing, operations, change management and strategy.

SAUDI
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AUTHORITY

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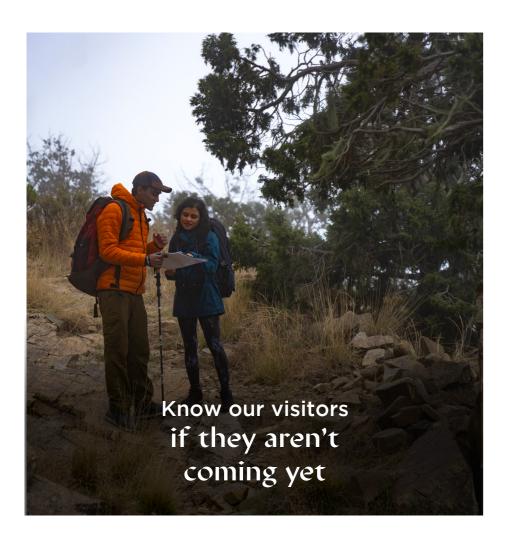
MODULE 01

DESIGN
Group around
visitor preferences
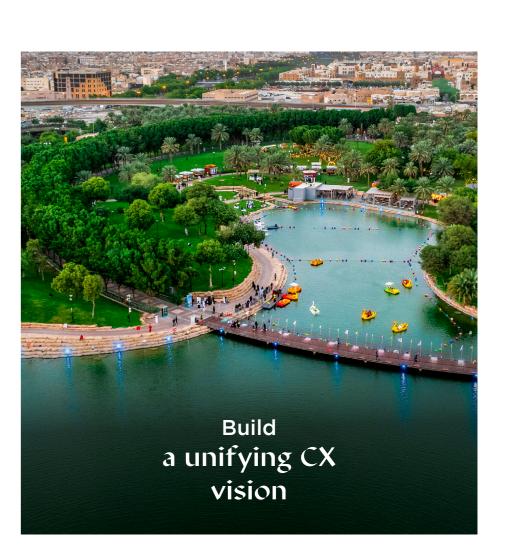
The objective of the Customer Experience (CX) module is to help organizations group around customer preferences. Though in an Infant, large & complex setting like ours, certain challenges are prominent such as

"HOW TO...":

Know our visitors
*if they aren't
coming yet*

Focus on
*what matters
most*

Build
*a unifying CX
vision*
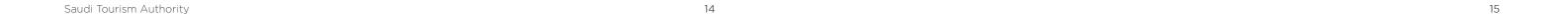
Therefore, this module outlines the approach and learnings we can share.

Introduction

DESIGNING THE VISITOR EXPERIENCE FOR AN ENTIRE COUNTRY

When the **Saudi Tourism Authority** embarked on the Visitor Experience project in **2019**, it initially presented a conventional design research challenge, requiring in-depth interviews, insights, design requirements, concepts and target journeys. All of this was made more complicated because of the sheer scale.

There wasn't one way of experiencing a country and there wasn't any way of understanding how certain visitors experienced Saudi Arabia, as they weren't yet travelling to the country. As a result, the direction of the project was focused on building the logic for how to apply a design research approach, as well as the design of the actual visitor experience.

CHALLENGE 01

Know our visitors if they aren't coming yet

As the country had just opened up to visitors, it wasn't going to be as simple as understanding what happens today for visitors, and so the design research had to focus on **understanding** how visitors currently planned out and experienced other destinations when they were trying to fulfil different trips. We defined these

as **'typologies of trip'**, for example, a romantic trip of a lifetime with my partner. **80** potential visitors were interviewed, across **8** different countries and **5** key markets. Interviews were conducted across the UK, USA, Malaysia, China, India, the United Arab Emirates, Saudi Arabia, and South Korea.

The research was planned around how an individual goes about planning a trip, and their perceptions of Saudi Arabia. This was followed by an in-depth interview, to **understand their end-to-end trips in detail**, and finally a post-task, describing an **idealised future** trip to Saudi Arabia and what would need to be true for them to come.

These qualitative interviews **encouraged visitors** to reflect on what they do when planning certain types of trip, in addition to understanding why they do it that way and to build deeper **understanding** of their **needs**, attitudes and behaviours that influence the way they travel.

8
COUNTRIES

China 🇨🇳

India/Malaysia/S Korea 🇮🇳 🇲🇾 🇰🇷

UAE 🇦🇪

KSA 🇸🇦

UK/USA 🇺🇸 🇬🇧

80
Travelers

5
SEGMENTS

♡ Couple reunion exceptional places

🔍 Family discovery trip

🧗 Well discovered adventure

🗓 Annual family exploration

📍 Customized exotic trip

LOOKING FOR INSIGHT ON

The **emotional** end-to-end travel journey ♡

Their **needs, behaviours, motivations** and pain points 🛍

What makes memorable travel experiences and **why** 📖

The current perception of travel to Saudi Arabia and **why** 👁

What Inclines visitors to return and **why** 🏔

What are their big spend moments and **why** ⏳

What the **ideal travel journey** in Saudi Arabia could be 📍

Figure 1. Research Approach

CHALLENGE 02

"Focus on what matters most"

The biggest challenge in understanding how to re-design the visitor experience, was how to avoid **'boiling the ocean'**; that is, to get overwhelmed by the breadth of the information we were uncovering.

Through our analysis, themes began to emerge highlighting key preferences per segment. It became clear that the focus needed to be on determining **'what matters most'** to each of the visitor types; a simple concept, but one which was very much a breakthrough as we progressed through this project.

INSIGHTS

"EXAMPLE" Couple reunion in exceptional places – China

THEIR TRAVEL EXPERIENCES ARE COATED WITH A LAYER OF COMFORT AND EXCLUSIVITY (LUXURY) THROUGHOUT EVERY STEP OF THE TRAVEL JOURNEY

Brilliant basics; high-standards to cover their essential needs

The most functional parts of the trip such as accommodation and mobility are planned to ensure high levels comfort and sense of safety

Seeking Exclusivity and uniqueness during their trip

Experiencing the country and culture through unique activities that may even be designed personally and intimately for them

Soft landing into a new country and culture

Finding ways to enjoy the novelty of a country and culture in a familiar and comfortable manner

Pre-Trip   During Trip
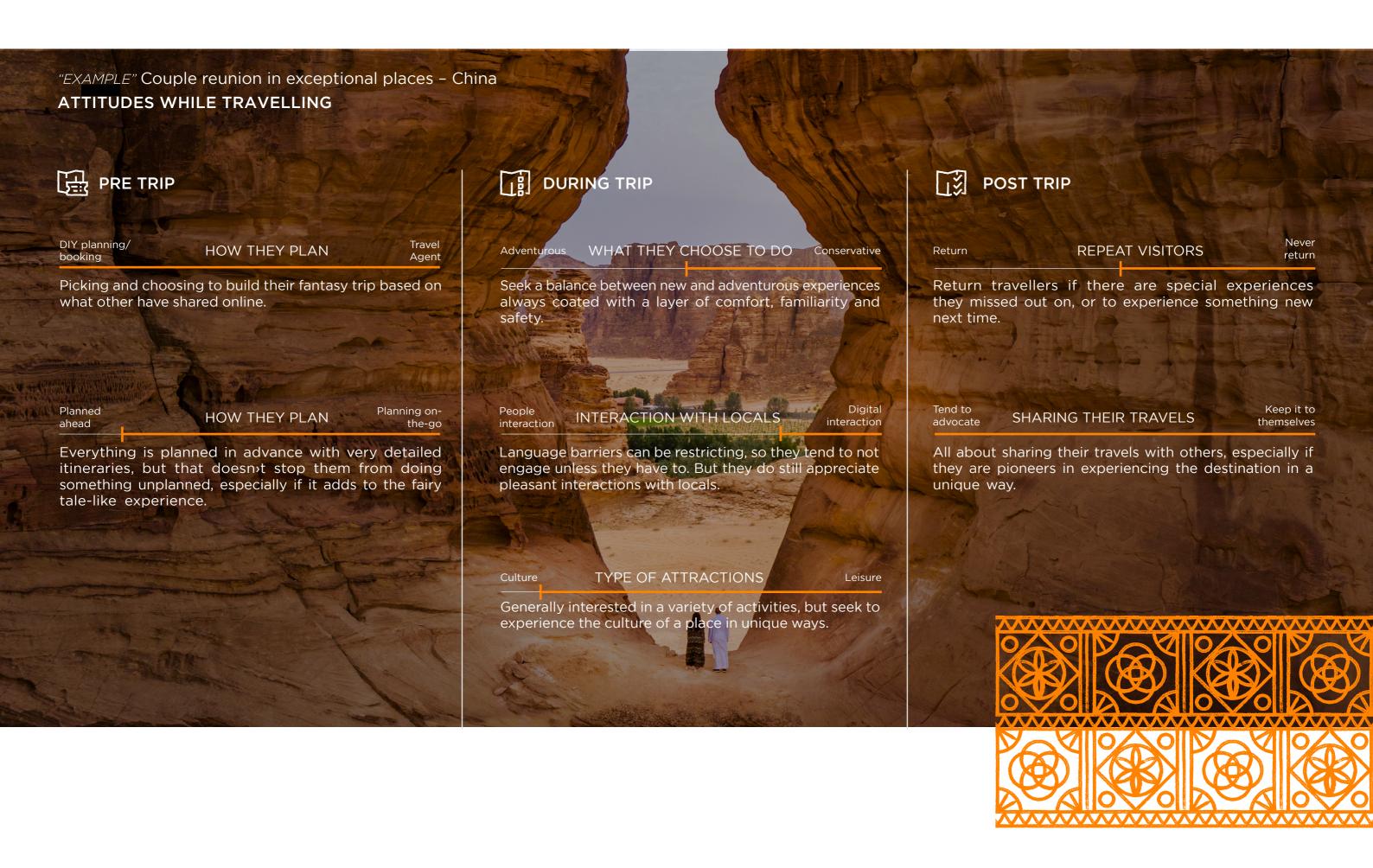
"EXAMPLE" **OPPORTUNITIES**

1 Ensure **upscale hotels** in all strategic locations throughout the country.

2 Promote the **hotels' beautiful surroundings, nourishing food and spacious rooms** rather than the amenities.

3 Provide personal translation services and **native Chinese speaking guides** in order to create better rapport and feeling of safety.

4 Ensure **private car services including Chinese drivers** available in main airport with knowledge of the area.

5 Create **one-off, deluxe experiences** and attractions in iconic locations.

6 Ensure **a selection of Chinese basic food offerings**, from restaurants to supermarkets, for them to get back to their comfort zone and feel reenergised.

Figure 2. Key themes of travel preferences outlining features of travel experiences

"EXAMPLE" Couple reunion in exceptional places – China
ATTITUDES WHILE TRAVELLING

PRE TRIP

HOW THEY PLAN

DIY planning/ booking — Travel Agent

Picking and choosing to build their fantasy trip based on what other have shared online.

HOW THEY PLAN

Planned ahead — Planning on-the-go

Everything is planned in advance with very detailed itineraries, but that doesn›t stop them from doing something unplanned, especially if it adds to the fairy tale-like experience.

DURING TRIP

WHAT THEY CHOOSE TO DO

Adventurous — Conservative

Seek a balance between new and adventurous experiences always coated with a layer of comfort, familiarity and safety.

INTERACTION WITH LOCALS

People interaction — Digital interaction

Language barriers can be restricting, so they tend to not engage unless they have to. But they do still appreciate pleasant interactions with locals.

TYPE OF ATTRACTIONS

Culture — Leisure

Generally interested in a variety of activities, but seek to experience the culture of a place in unique ways.

POST TRIP

REPEAT VISITORS

Return — Never return

Return travellers if there are special experiences they missed out on, or to experience something new next time.

SHARING THEIR TRAVELS

Tend to advocate — Keep it to themselves

All about sharing their travels with others, especially if they are pioneers in experiencing the destination in a unique way.

From the combinations of source markets and trip purposes, it was noticed, for example, that the **couple traveling** for a romantic trip of a lifetime had focused on certain key offerings as they embark on their journey. We learned that they expect certain levels of **comfort and luxury of where they stay and what they eat,** while immersing themselves in local lifestyle and indulging in unique experiences away from the masses.
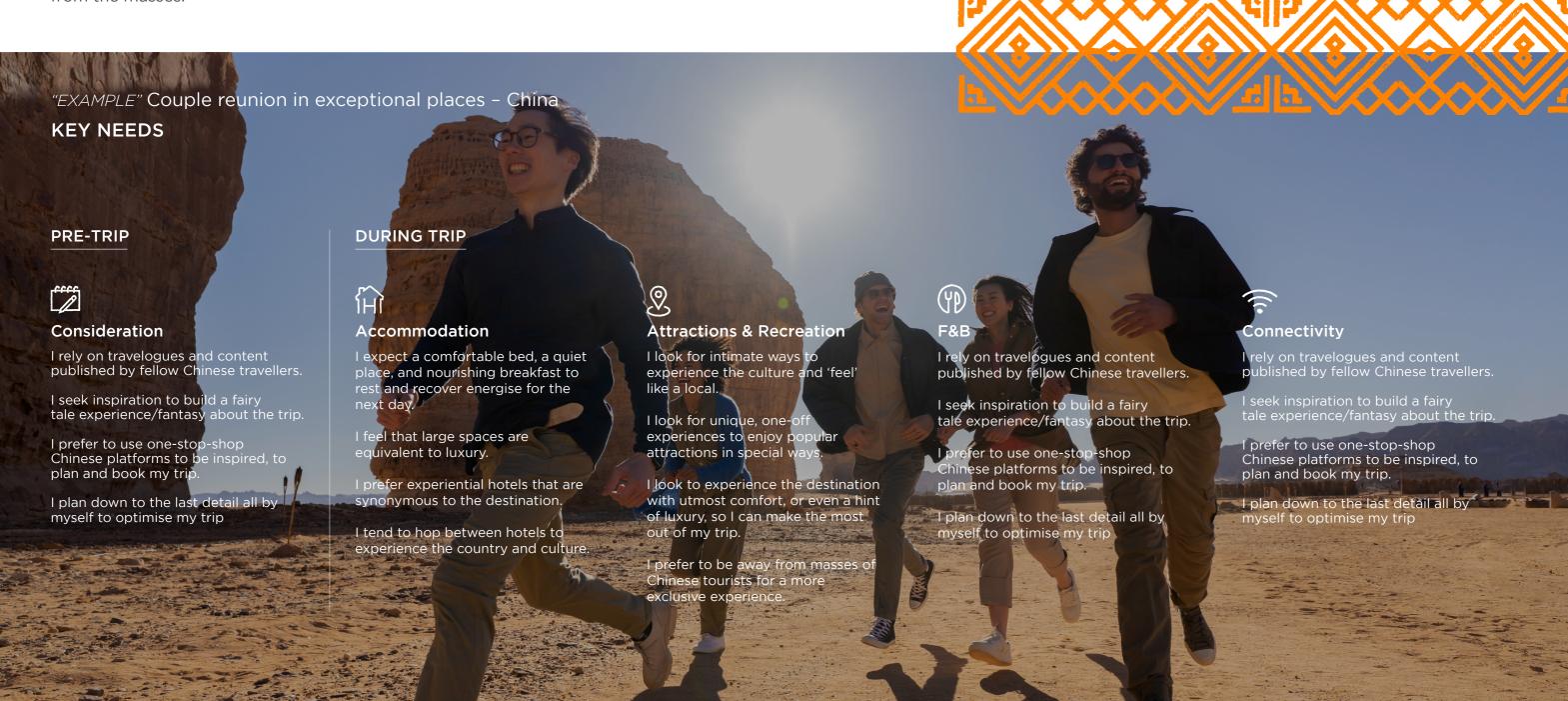
"EXAMPLE" Couple reunion in exceptional places – China

KEY NEEDS

PRE-TRIP

DURING TRIP

Consideration

I rely on travelogues and content published by fellow Chinese travellers.

I seek inspiration to build a fairy tale experience/fantasy about the trip.

I prefer to use one-stop-shop Chinese platforms to be inspired, to plan and book my trip.

I plan down to the last detail all by myself to optimise my trip

Accommodation

I expect a comfortable bed, a quiet place, and nourishing breakfast to rest and recover energise for the next day.

I feel that large spaces are equivalent to luxury.

I prefer experiential hotels that are synonymous to the destination.

I tend to hop between hotels to experience the country and culture.

Attractions & Recreation

I look for intimate ways to experience the culture and 'feel' like a local.

I look for unique, one-off experiences to enjoy popular attractions in special ways.

I look to experience the destination with utmost comfort, or even a hint of luxury, so I can make the most out of my trip.

I prefer to be away from masses of Chinese tourists for a more exclusive experience.

F&B

I rely on travelogues and content published by fellow Chinese travellers.

I seek inspiration to build a fairy tale experience/fantasy about the trip.

I prefer to use one-stop-shop Chinese platforms to be inspired, to plan and book my trip.

I plan down to the last detail all by myself to optimise my trip

Connectivity

I rely on travelogues and content published by fellow Chinese travellers.

I seek inspiration to build a fairy tale experience/fantasy about the trip.

I prefer to use one-stop-shop Chinese platforms to be inspired, to plan and book my trip.

I plan down to the last detail all by myself to optimise my trip

Figure 3. ID Cards explaining behaviors and attitudes of targeted markets

HOW THEY EXPERIENCE THE DESTINATION

Building a fairy tale experience

Dreamy travellers that fantasize and project a romantic idea of the destination they are about to visit, which they try to recreate on the ground.

PERCEPTION OF TRAVEL TO KSA

Conservative ———————————|————— Open

Positive feeling towards travelling to Saudi Arabia, however, it is considered an adventure destination rather than a romantic one; lack of information online deems it as uncharted territory

"EXAMPLE" Couple reunion in exceptional places – China

WHAT MATTERS MOST TO THEM WHILE TRAVELLING

The luxury of comfort

Their experience is coated with a layer of comfort and exclusivity throughout every step of the travel journey

Places they visit

FRANCE   JAPAN   MALYSIA   NEW ZELAND   THAILAND

— Offers unique and once - in - a - lifetime experiences.

— Vast information from fellow Chinese travellers in national platforms.

— Regular international travel to nearby locations due to limited holidays, and long haul for special occasions

A fantasy trip based on social media

Social media has a big influence on choice of destination, planning, and creating itineraries that bring to life their fantasy travel experience

Where they spent the most

ACCOMMODATION   AIR FARE   SHOPPING

— Unrestrained budget for shopping.

— Always include shopping in the itinerary.

— Main focus on luxury products that can be found cheaper than in China.

— Shop a bit of everything, from souvenirs to local specialties.

Establishing oneself as an influencer

Social media is their world and the way they express themseves and influence others. Being connected online during travels allows them to share special and unique moments with their followers, and offer tips and guidance on-the-go

Channels they use

MAFENGWO   CTRIP W   XIAHONGSHU   WECHAT   OASIS

— Chinese platforms only, due to governmental firewalls.

— One-stop-shop platforms to inspire, plan and book travels.

— Trust only travellogues and information straight from Chinese fellow travellers.

Figure 3. ID Cards explaining behaviors and attitudes of targeted markets

Through this lens of establishing **'what matters most'**, we were able to provide an overarching concept direction for different visitor journeys. This shorthand positioning of the journey would be effective in communicating the essence of all the insight we had gathered and give the design and development teams an overall direction for what a great visitor experience could look like for each of the different types of visitor.

By identifying **'what matters most'**, we were also able to focus on developing detail in specific areas, that would have the greatest impact on visitors' experience of Saudi Arabia.

We defined the visitor journey that we would build out the detail for, for each of **THE TARGET VISITOR SEGMENTS:**

I
Consideration:

Searching and planning a trip.

II
Accommodation:

Information, formats, facilities and services.

III
Mobility:

Private and public transport options.

IV
Attractions & Recreation:

Things to see and do and how to experience them.

V
Food & Beverage:

Information, range, availability, quality.
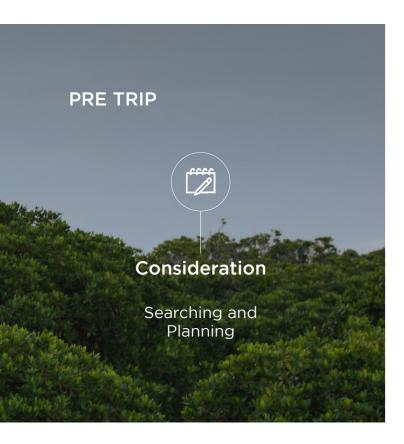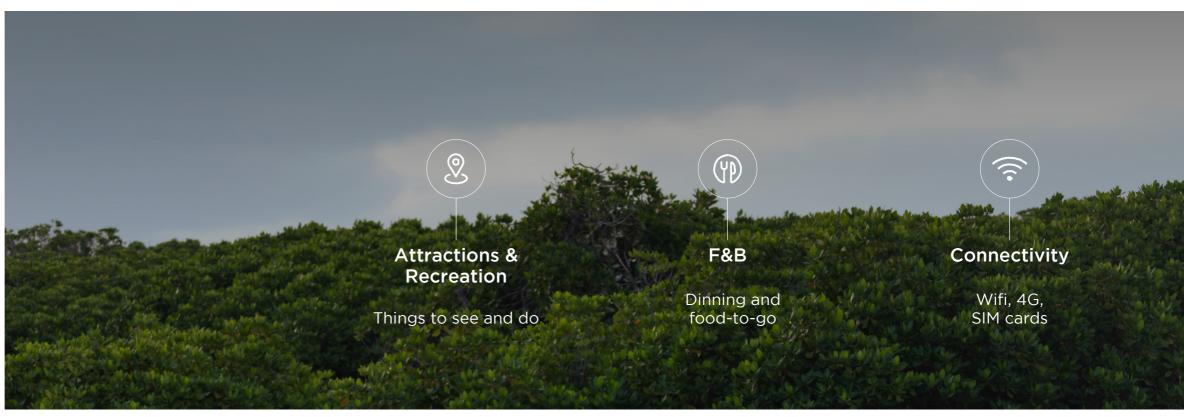
VI
Connectivity:

Wi-Fi, 4G, Sim cards and information on the go.

Figure 4.Highlights of make-or-break moments of the couple's trip and what they expect in each touchpoint/offering

PRE TRIP

Consideration

Searching and
Planning

**Attractions &
Recreation**

Things to see and do

F&B

Dinning and
food-to-go

Connectivity

Wifi, 4G,
SIM cards

But rather than develop discrete concepts that address these areas, we wanted to focus on **developing a baseline** set of responses that could be used to inspire and influence several existing and future projects, **initiatives and workstreams.**

Once developed, we then validated these strategic responses with travel experts who would have a clear perspective on the **needs of the source markets** we were focused upon.

Each of these areas has an overarching goal for the targeted market, that then gets further specified into targeted responses that would achieve that goal. When it comes to accommodation, the couple would be looking for a blend of luxury **(as mentioned previously),** local flavour, and nutritional meals to enjoy during their stay. That could very well translate into aspects of comfort, such as the quality of the mattresses or the quietness of the ambiance, providing the Saudi flavour through the accommodation architecture or narrative, and providing a combination of local and international nutritional meals.

Figure 4. Highlights of make-or-break moments of the couple's trip and what they expect in each touchpoint/offering

"EXAMPLE"
ACCOMMODATION | STRATEGIC RESPONSES

CREATE THEMATIC EXPERIENCES SYNONYMOUS WITH SAUDI CULTURE

Visitors from this segment want to experience the local culture by getting authentic recommendations from staff members. It›s a bonus if the hotel feels special and connects with the culture and it traditions.

ENSURE HIGH COMFORT WITH A TOUCH OF LUXURY

Visitors from this segment give great importance to a good nights sleep so they are completely rested everyday to make the most of their trip.

OFFER INCREDIBLE BREAKFASTS

This segment wants healthy and nourishing breakfast at their accommodation with a wide variety of international choices as it is the most important meal of the day for them.

Elevate traditional Saudi architecture and ways of living

Emulate traditional living styles to let visitors get closer to the culture through the accommodation.

Eg Arefurbished traditional building convert into a hotel

Include distinctive accommodation formats

Ensure different accommodation formats for visitor to experience the culture from different angles.

Eg Modem architecture hotel or upscale guest houses

Offer services with a storyline

Ensure services have a strong narrative that connects with Saudi for visitors to learn more about the country.

Eg tell the history or interesting facts about the building while booking at the hotel through employees or written content

Local service with Chinese awareness

Equip and train staff on Chinese manners, language and able to share Saudi traditions and stories.

Promote accommodations with outstanding surroundings

Emphasise the exclusive natural/urban lodging location and views equally as amenities offered.

Eg accommodation in the middle of the desert with spectacular views on the osais

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Emphasise comfort of sleep

Focus on mattresses quality, quietness of the place and aspects that improve the overall quality of sleep

Eg explain what type of mattresses you offer in the hotel during the booking

Have upgrade options for visitors to select from

Design customisable or tiered accommodation models for visitors to upgrade their stay with small luxuries or additional comforts such as choice of pillows.

Eg Romantic decors or tailor made menu and catering services

Surprise with romantic details

Focus on mattresses quality, quietness of the place and aspects that improve the overall quality of sleep

Eg offer personalised gifts to guests

Provide accommodation choices with extraordinary views or more private/intimate settings

Promote hotels` natural surroundings and specific rooms with outstanding views and high privacy for an intimate setup.

Eg offer rooms with extraordinary views of the desert or natural wonders

---

Offer breakfast with hotel bookings

They value breakfast as it is the their most important meal and great nutritious breakfast menu is key to attract this segment.

Eg include breakfast details during the booking of the room

Ensure ample international choices

Allow for a taste of the local cuisine, Chinese comfort food and some international option always available for breakfast.

Share in-depth information about the nutrition value of meals

Provide food nutrition on bookings and menus

Eg create a nutritious value card next to each items of the menu

Target fit-for-purpose meals

Satisfy the daily needs of visitors and easy guide to make their choices

Eg create specialised menu and dishes that fit the mood of the visitor such as detox booster drink or energy dose meal

Figure 6. Strategic responses detailing accommodation preferences for the segment

CHALLENGE 03

Build a unifying CX vision

Our next challenge was to **develop example experiences** for each of the target visitor segments, that would bring the strategic responses to life, as we designed a desirable visitor experience.

It was clear this couldn't be delivered as a detailed service design, but rather a highly impactful communications tool to demonstrate what the ideal target experience would be for the visitors we were focused on, so that individual initiatives and projects could get a **clear sense** of the overall vision.

The team created large format storyboards that would communicate how the focus areas and the associated strategic responses, could lead to **an enhanced end to end visitor experience** that catered to the needs of the different visitor segments.

This gave us an engaging way to bring the future **visitor experience** to life, and then dive into the detail with eco-system partners to collaborate on how to achieve a version of it for their aspect of the visitor experience.
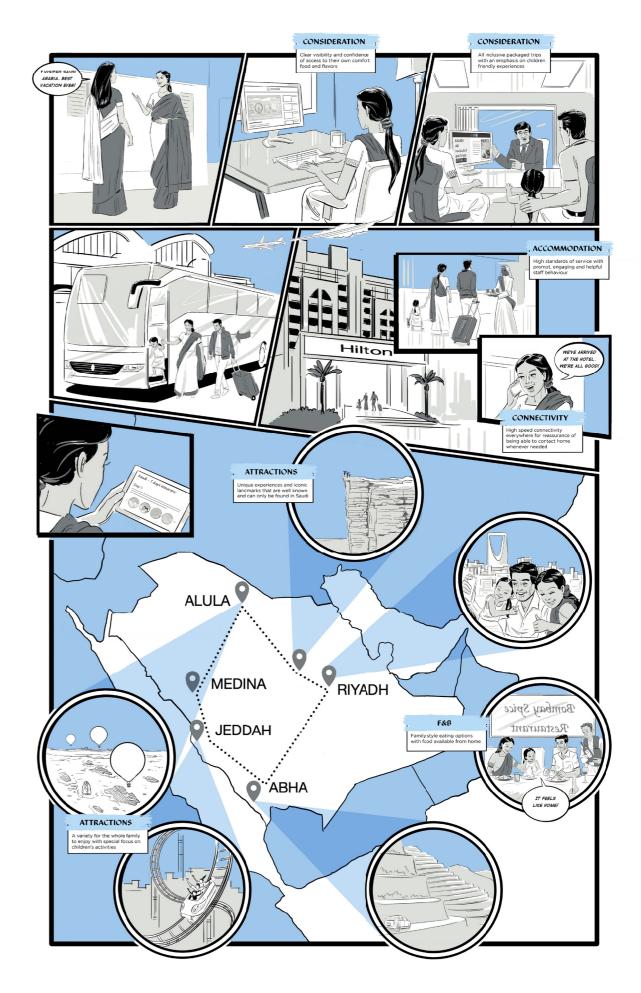
Figure 7.A north star to align strategic efforts towards achieving the desired experience

Learnings & Success

Building the foundations of **'know your visitor'** and integrating it into the design activity, has become an integral visitor design capability. It creates a common language for designing the visitor experience to attract, satisfy and exceed the expectations of target visitors and provides actionable responses to focus design effort. It also communicates a vision for the visitor experience that is deep rooted in the needs and behaviours of visitors, that can help all destinations get fighting fit for when those visitors start streaming in.

Since the delivery of the programme and with the collective efforts of the travel eco-system, we have seen a notable increase in the **5** of the **6** areas of most importance all segments especially amongst those travelling domestically who account for the largest percentage of today's visitors.

It's clear that there is still progress needed, but the early signs demonstrate that focusing on the things that matter most can have a tangible and measurable impact on those considering and travelling to KSA and continued focused effort can only further enhance that progress.

MODULE 02

DELIGHT
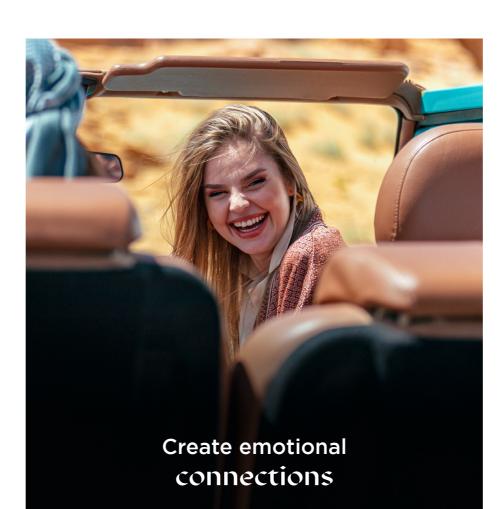
Infuse **moments of delight**
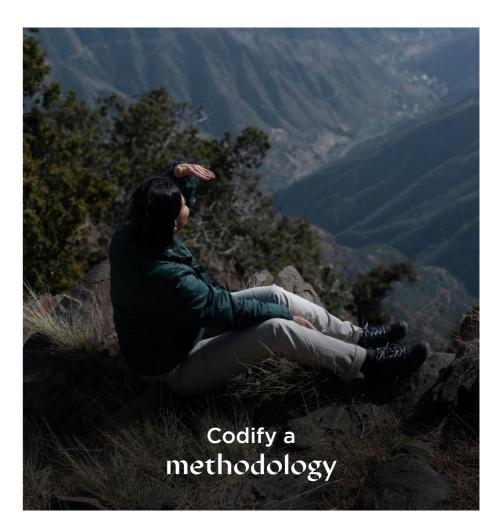
The objective of this Customer Experience (CX) module is to infuse moments of delight for your customers along their journey. Though in an Infant, large & complex setting like ours, certain challenges are prominent such as

"HOW TO...":

Define
delight

Create emotional
connections

Codify a
methodology

Therefore, this module outlines the approach and learnings we can share.

Introduction

MOMENTS OF DELIGHT

While feelings of **"satisfaction"** are necessary for a positive visitor experience when traveling, it is "delight" that takes visitor experiences to the next level, making them more memorable and likely to be shared with or recommend to others.

To deliver memorable and distinctive experiences, we embarked on a journey to pioneer an innovative, scientific methodology to design and measure **"moments of delight"** at every touchpoint for travelers during their visit.

Why do we remember travel memories so vividly, but not what we had for dinner last week? Travel allows us to step outside of our normal, everyday lives. We don't know what to expect, but our senses are amplified because everything is unique and new. Often, what we remember from our travels are the heightened, multi-sensory moments where we were truly delighted – a local helping us out when we're lost, the sounds of music at a cultural performance, the color of the sky at sunset on a mountain.[1]

[1]Tolentino , Christian (2018). SWISS Travel memories have the power to shapeour personality.
https://www.traveldaily media.com/swiss-travel-memories
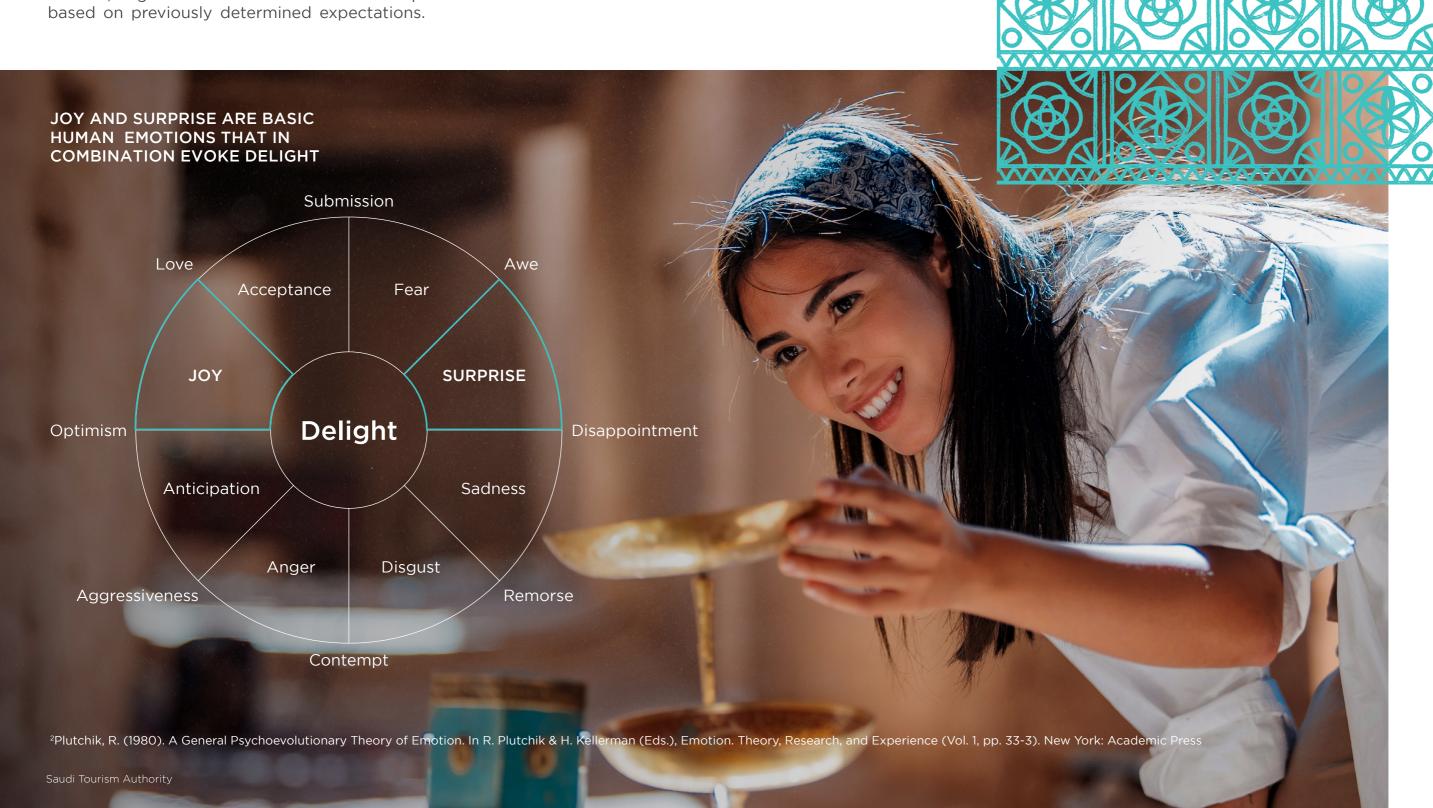
CHALLENGE 01

Define Delight

"Delight" can be defined as a deep, emotional reaction of both joy and surprise to an experience that exceeds all possible expectations or is out of the ordinary from daily life.[2] **"Satisfaction"**, on the other hand, is a rational, cognitive reaction to a service or experience based on previously determined expectations.

JOY AND SURPRISE ARE BASIC HUMAN EMOTIONS THAT IN COMBINATION EVOKE DELIGHT

Submission

Love

Acceptance   Fear

Awe

JOY   **SURPRISE**

Optimism   **Delight**   Disappointment

Anticipation   Sadness

Anger   Disgust

Aggressiveness   Remorse

Contempt

[2]Plutchik, R. (1980). A General Psychoevolutionary Theory of Emotion. In R. Plutchik & H. Kellerman (Eds.), Emotion. Theory, Research, and Experience (Vol. 1, pp. 33-3). New York: Academic Press

DELIGHT TO VALUE (D2V)
MODEL OVERVIEW

Consumption > **Effect** > **Outcome** > **Impact** > **Performance**

Surprising consumption

Pleasure → Delight

Affect

Satisfaction

Disconfirmation

Recommendation

Loyalty

Revisitation

Spending

Total Spend

Number of Visitors

Amplifier

Memorability

Shareability

☐ New elements of measurement and design proposed

Source: Adapted from Chitturi at al (2008), Kim et al (2015), Oliver et al (1997), and Zeithaml et al (1996)

DELIGHT TO VALUE (D2V) MODEL OVERVIEW

Organizations typically have focused on cognitive satisfaction to help drive customer loyalty and repeat spend. If the organization exceeds a customer's previously held expectations, the customer will be satisfied.[3]
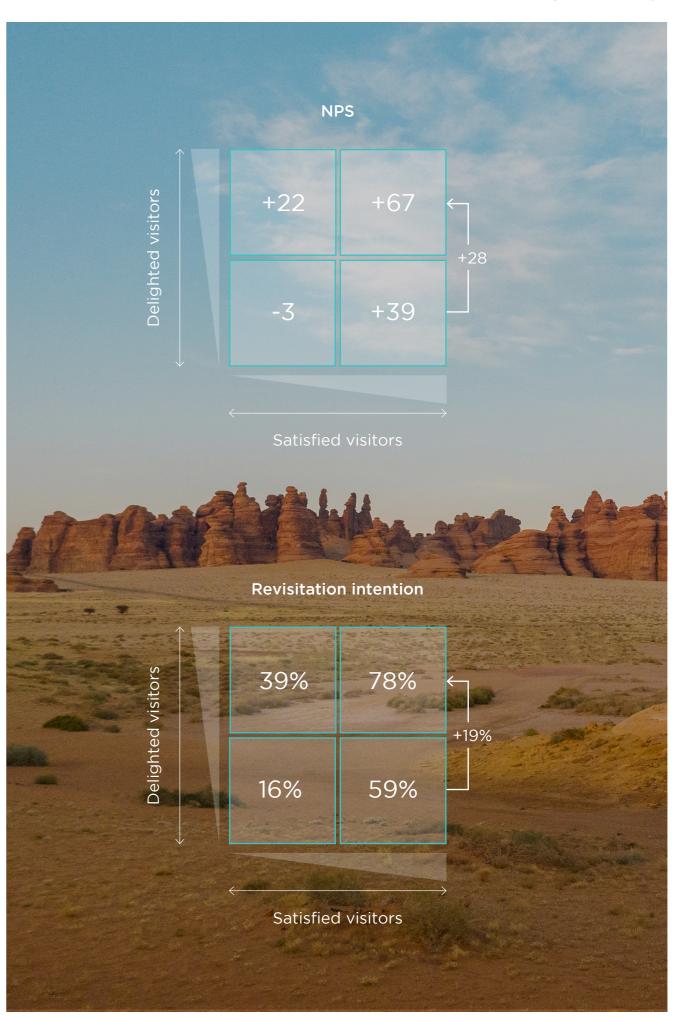
When travelers are in a heightened state - beyond satisfaction - experiencing distinctive, multi-sensory moments where they feel joy and surprise drives delight. In these moments, visitors establish an emotional, long-term connection to the destination creating extensive loyalty that compels them to return. They develop memories that they will never forget, ones that they have to tell their friends and family about.[4]

We found through our research that visitors who had a distinct memory of delight during their travel experiences were **~60%** more likely to revisit a destination and **~150%** more likely to recommend a destination to friends and family.

NPS

Delighted visitors

+22	+67
-3	+39

+28

Satisfied visitors

Revisitation intention

Delighted visitors

39%	78%
16%	59%

+19%

Satisfied visitors

[3]Oliver. R. L. (1980). A Cognitive Model of the Antecedents of Satisfaction Decisions, Journal of Marketing Research, 17, 49-46; Oliver, L. R. (1977). Effect of expectation and disconfirmation on post exposure product evaluations: an alternative interpretation, Journal of Applied Psychology, 62 (4), 480-486.
[4]Hemmington, N. (2007). From Service to Experience; Understanding and Defining the Hospitality Business. The Service Industries Journal, 27, 6, pp 747-755.

CHALLENGE 02

Create Emotional Connections
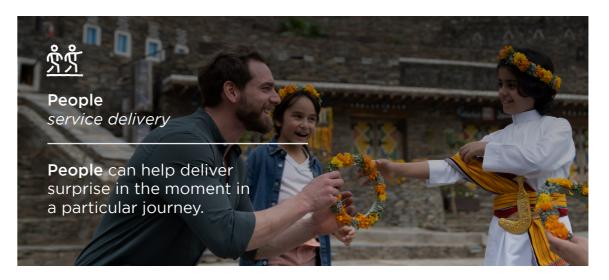
Moments of delight typically come in the form of two mediums –tangibles (i.e., physical spaces, attractions, products) and people (i.e., human-centric interactions). A tourist may be delighted and never forget the intricate details of the architecture at the historical, cultural old town of Jeddah – Albalad but getting to know local date farmers and learning about their lives in Saudi Arabia would create a delightful moment of a lifetime.

TWO CRITICAL ASPECTS ARE NEEDED TO CREATE A "DELIGHT ENGINE" TO EMBED JOY AND SURPRISE ACROSS THE JOURNEY

People
service delivery

People can help deliver surprise in the moment in a particular journey.

⚗ Effort | ⊘ Expertise

Tangibles
experience environment

Tangibles in product development can be designed to deliver joy and surprise
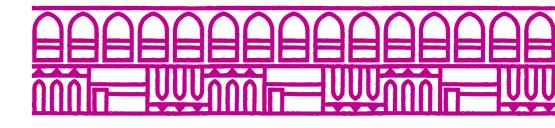
🛍 Products | 🏛 Places (Visitor hubs)

A STORY ABOUT RITZ CARLTON AND THEIR DELIGHT ENGINE

A child left his toy (Joshie the Giraffe) behind on his family's holiday. The hotel sent it back along with some branded freebies as well as Joshie's documented photo book **"extended holiday"**

BEST IN CLASS VISITOR HUBS ARE ALSO CONFIGURING THEIR OFFERING FOR SURPRISE AND DELIGHT

PLACEMAKING

Sunflower umbrellas, Masdar City, Abu Dhabi

PROGRAMMING

Wild wonders, open air galleries, Copenhagen
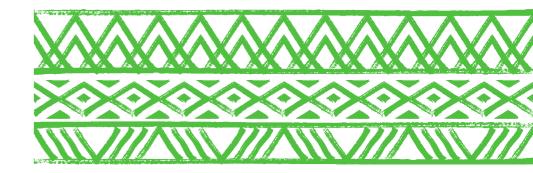
PARTICIPATORY EXPERIENCES

London's largest living room

Source: Ritz Carlton

CHALLENGE 03

Codify a Methodology

The development of a delight checklist can help trade partners design and curate moments of delights at scale, whilst also driving consistency throughout a diverse range of ecosystem partners.

DESIGN GUIDE FOR DELIVERING DELIGHT ACROSS THE VISITOR JOURNEY

Local People

— Design for collisions between locals and visitors

— Embed Hafawah hospitality at every interaction

— Develop personalized staff interventions for key segments

— Create encounters to witness common Saudi life

Attractions

— Shift tourist from passive viewer to explorer

— Move beyond "family-friendly"–create genuine excitement and laughter for all ages

— Accentuate the most breathtaking natural beauty view-points

— Match sense of anticipation with sense of arrival

Activities

— Activate assets through dynamic programming

— Scale-up participatory and "giving-back" activities for visitors

— Curate multi-sensorial moments that leave lasting memory imprints

— Enable do-it-yourself activities

Personal Events

— Elevate experience offering for special occasions and life-events

— Encourage organization of home-coming and reunion activities

Service

— Enhance first and last impressions to trigger the "primacy and recency" effect

— Establish, recognize and reward service standards

FnB

— Encourage trial of authentic Arabian delicacies

— Promote variety of high-quality food offering in key visitor hubs
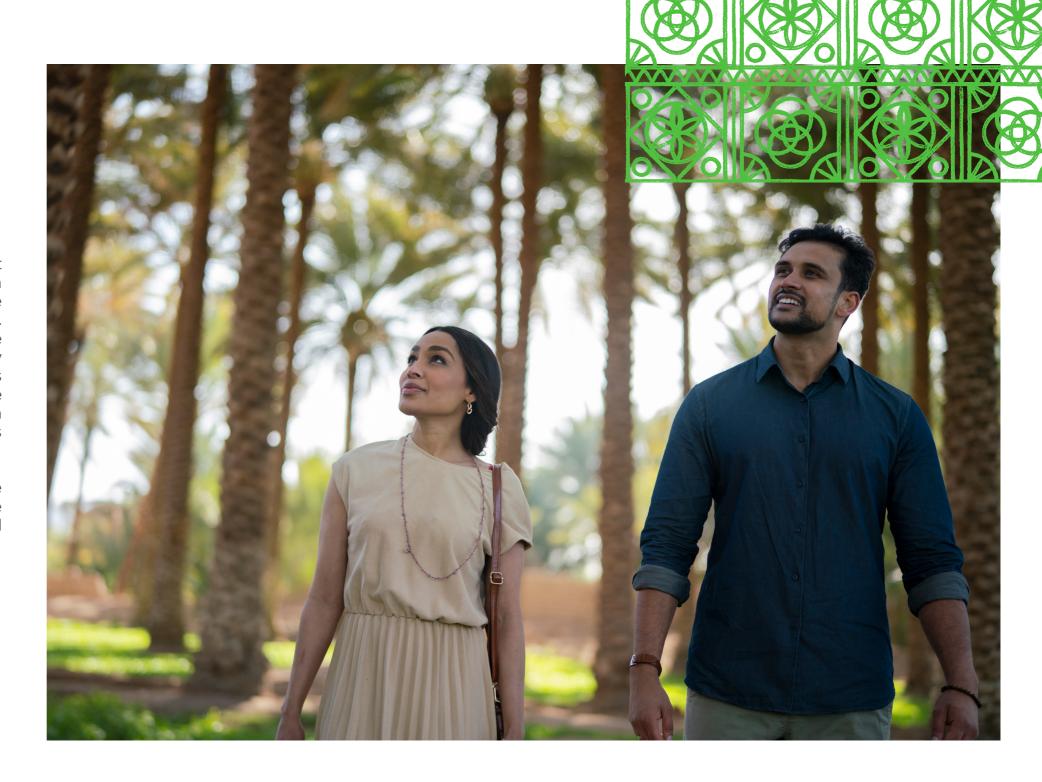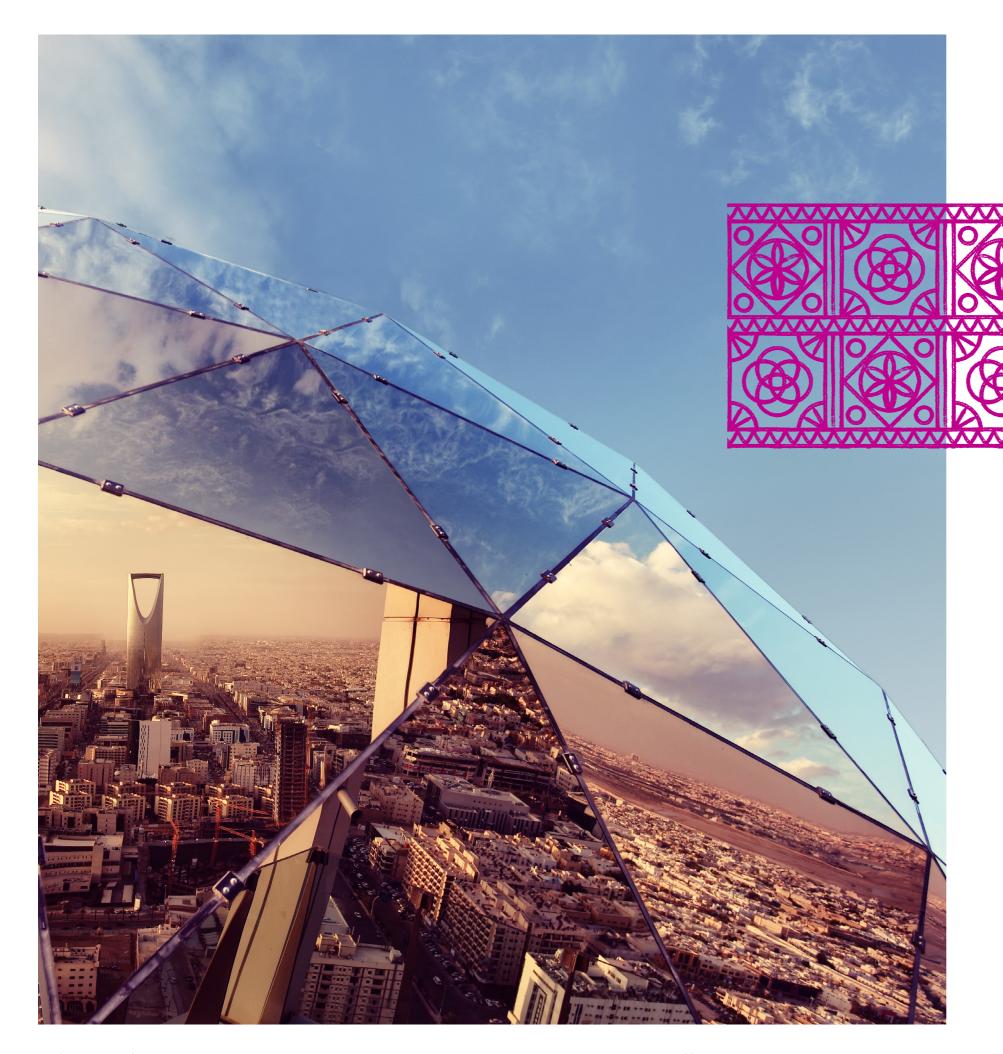
Learnings & Success

We have found through our analysis of visitors that delight induced through people, particularly the frontliners can leave strong, lasting impressions on visitors that translate into increased NPS and Customer Satisfaction scores. This has been made possible through the collective efforts of the tourism eco-system within the country through prioritization and execution of reactive initiatives developed and continuous efforts on improving service delivery and front-liners' performance. There has been a notable increase in NPS and satisfaction across frontliner care.

It's clear that there is still progress to be made, but the early signs demonstrate that focusing on delight can have a tangible and measurable impact and continued focused effort can only further enhance that progress.

MEASURE
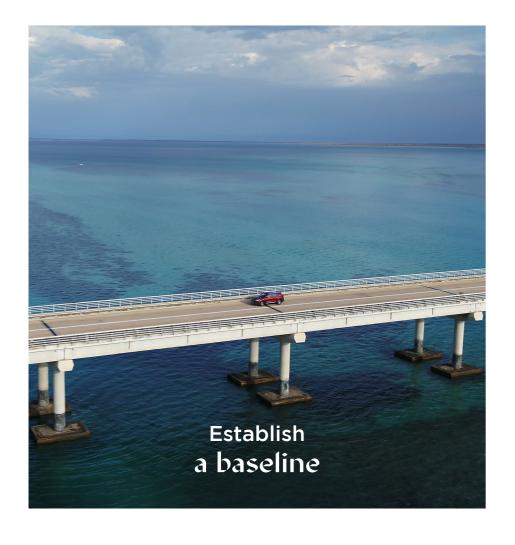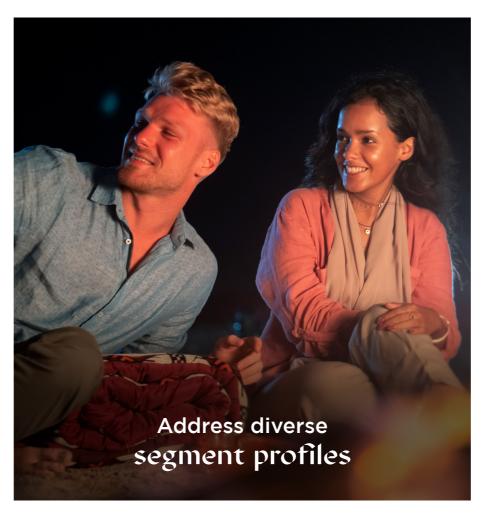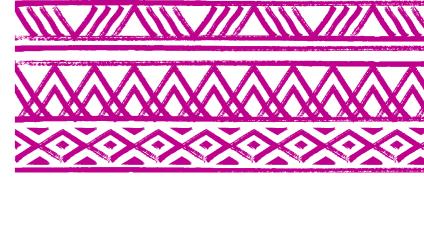
Operationalize
around impact
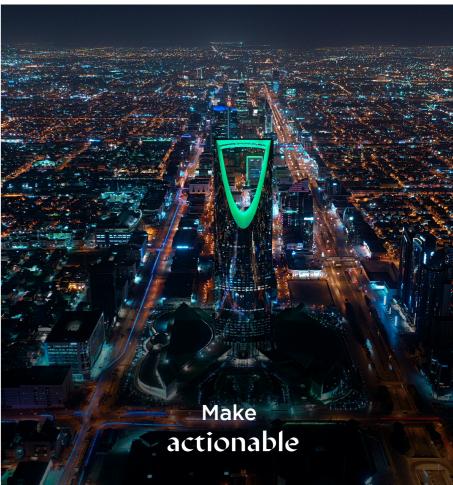
The objective of this Customer Experience (CX) module is to operationalize around impact. Though in an infant, large and complex setting like ours, certain challenges are prominent such as

"HOW TO...":

Establish
a baseline

Address diverse
segment profiles

Make
actionable

Therefore, this module outlines the approach and learnings we can share.

Introduction

Visitor Experience measurement is a main source of knowledge about visitors, their experiences, needs and expectations.

This module presents the way we developed and implemented the Voice of the Visitor (VoV) measurement framework, highlights key challenges and the methodologies used throughout the steps and impact on the visitor experience performance.

The **VoV** covers data of both domestic and inbound visitors collected on a regular basis with weekly, monthly and quarterly updates. A sample of **~N=5,500** interviews is collected on a monthly basis using online and face-to-face methods at 16 leisure destinations. The sample distribution takes into consideration prioritization and visitation of the destination, events attended and seasonality of leisure activities.

Insights of **VoV** are connected with feedback from different channels and data sources internally to create a compelling story that drive initiatives. External stakeholders are invited to collaborate in action planning in their respective fields and areas of interest, while dashboards are used to surface insights to right people within entities involved in the process.

Through the execution of the Voice of Visitor measurement, we were able to track impact of any interventions undertaken to improve the experience of visitors. The outcomes of the measurement in **2022** show, that the efforts of the VX ecosystem pay off with advocacy, intention to re-visit and overall experience with tourist offerings elevated compared to the initial **2020** data.

	Domestic tourism	Inbound tourism
	Q1/Q2 2022 vs. Q2/Q3 2020	Q1/Q2 2022 vs. Q1 2020
Recommendation (NPS)	+8	+4
Intent to re-visit	+19 p.p.	+3 p.p.
Average offering satisfaction	+7 p.p.	+17 p.p.

Figure 1. Improvements of KPIs in 2022 compared to 2020 outcomes

CHALLENGE 01

Establish a Baseline

Development of the Voice of Visitor measurement system has been a challenging process, since it relates to multiple dimensions that influence the framework and, at the same time, are impacted by the outcomes of the program. The system, in its founding stages, was set to be a robust, strategic, and methodical framework, which allows for extendibility, innovation, and agility in data capturing.
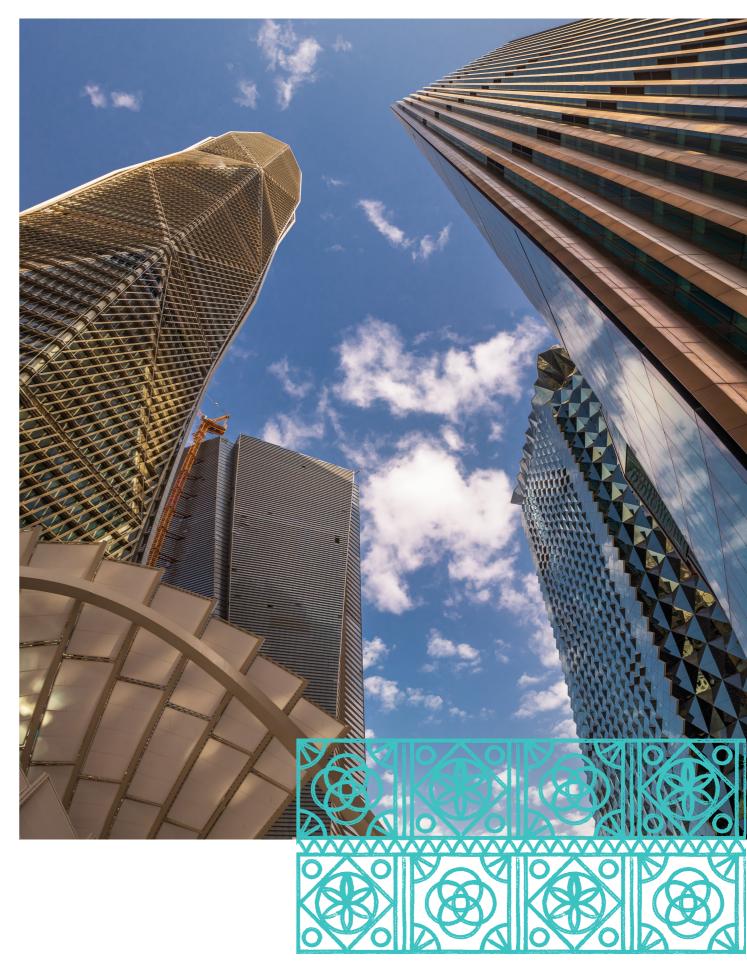
The main challenge with kicking off the measurement framework was lack of supportive tourist experience data to design and validate the measurement system.

That was overcome by phasing the project, with the first stage serving as a pilot.

AND THAT INCLUDED

1 | **Exploratory phase** – focused on uncovering the needs, expectations and perceptions of potential visitors, as well as defining end-to-end visitors journey touchpoints that make up the experience

2 | **Validation phase** – aimed at collecting data to run statistical analysis helping to confirm or reject hypothesis and validate the measurement model elements

EXPLORE
PHASE 1

A macro-journey level
approach to understand
the big picture

PRIORITIZE
PHASE 3

Identify touchpoints
that matter most in
the entire journey

SETTING THE BASELINE   TRACKING

VALIDATE
PHASE 2

Measure performance
to identify areas of
improvement

DIAGNOSE
PHASE 4

A dipstick and deep-dive
diagnostic measurement of
priority touchpoints across
different levels

Figure 2. Initial plan to develop measurement system

The first step of the process has set the baseline for understanding travelers' journey components, their needs and expectations when visiting an unknown country.

THIS PHASE WAS UNDERTAKEN USING MIX OF METHODOLOGIES, LIKE:

1 | **Desk research** – review of secondary data and assessment of other tourism experience measurement models across the world, to dissect most dominant elements that drive tourist satisfaction and sentiments.

2 | **Qualitative research** to understand perceptions of tourism in Saudi Arabia, current infrastructure and level of development supporting comfortable travel around the country. In-depth interviews with locals and expat residents, who had travelled around Saudi Arabia, and had experience with leisure visits to other destinations outside the country, helped to draft an initial visitor journey blueprint. This was supported by interviews with experts in the sector to add another perspective to the topic.

3 | **Experience triggering research** – first of its kind mystery visit exercise, engaging **40** travelers representing **15** source markets in leisure trips around Saudi Arabia prior to an official e-visa launch allowed to test the processes on place and understand first impressions about tourist offerings.

Next step in the process included quantitative online study with former visitors to Saudi Arabia (mainly business and family purpose) that allowed to run first validation of the model and set a list of hypothesis in regards to measurement components, importance of different journey stages, as well as areas of improvement related to products and services available for tourists (incl. mobility, communication, accommodation facilities, etc.).

The initial model for measuring Voice of the Visitor, with all the components playing role in an intended final outcome, has been finalized and ready to be tested among tourist visiting Saud Arabia in the last quarter of **2019**.

CHALLENGE 02

Address diverse segment profiles

Unlike regular experience delivery brands **(bank, e-commerce, taxi service)**, where a focus is simple and straight forward, and customer experience is measured mainly based on individual events through identified touchpoints **(branch visit, online purchase, taxi ride, etc.)**, Saudi Arabia as a destination offers visitors a spectrum of tourist offerings delivered at an overall country level, destination level, attraction or activity level and is spread throughout the visit duration **(short to long stays)**.

Understanding of visitors' experience at each and every stage of the journey, linking that to overall visit satisfaction, makes the measurement framework quite difficult. However, complexity comes into place with the view on overarching visitor profile.

LEISURE TRAVELERS WERE DIVIDED INTO SEVERAL SEGMENTS BASED ON:

1 | Source market of a visitor: domestic, regional, international

2 | Purpose of the leisure visit (culture or heritage seekers, adventure seekers, etc.)

3 | Type of a visit: group composition, duration of stay, itineraries used

With the first visitor journey blueprint in place, a quantitative study survey was designed aiming at collecting feedback from international leisure visitors post opening of the market in September **2019**.

The survey was designed to capture overall visit satisfaction, recommendation, potential to re-visit, assessment of tourist offerings, and image of Saudi Arabia. It also probed for more detailed understanding of areas that visitors were not satisfied with, to identify key weaknesses within each offering.

THE END-END VISITOR JOURNEY COVERS 12 KEY OFFERINGS AND 6 CROSS CUTTING THEMES

E2E TOURIST JOURNEY

- Inspiration
- Planning and booking
- Entering KSA
- Tourist support services
- Accommodation
- Tourist attractions
- Leisure and entertainment
- F&B
- Retail
- Mobility
- Incident management
- Leaving KSA
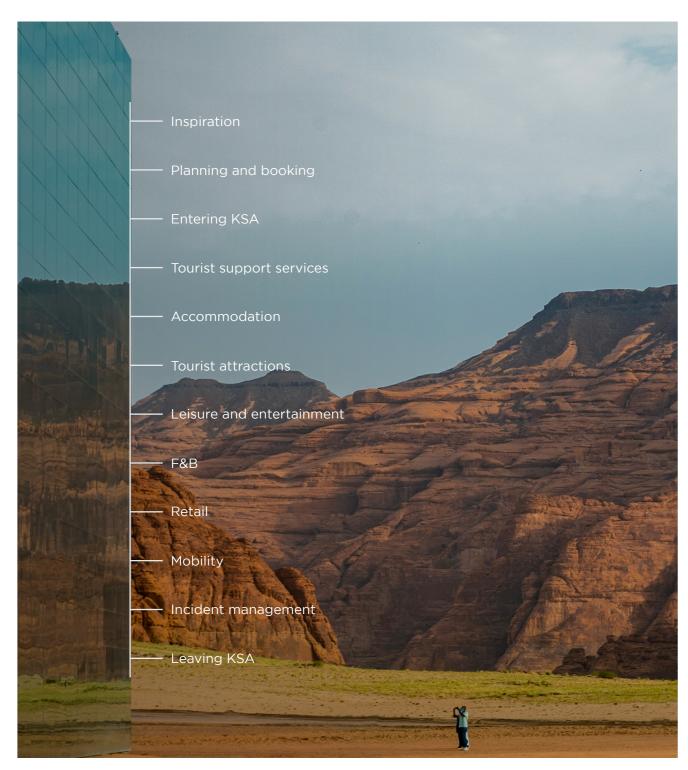
Figure 3. Coverage of end-to-end visitor journey within measurement framework

CROSS-CUTTING THEMES
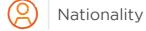
1 | Hafawah
2 | Variety of options
3 | Value for money
4 | Covid-19 precautions
5 | Cleanliness
6 | Safety and security

The survey was distributed to all tourist e-visa holders, within **5** days post their departure from Saudi Arabia, in order to base their feedback on fresh memories. With a response rate of **~20%** nearly **5,000** surveys were used for analyses in the first **3** months of the exercise.

For the purpose of driver and correlation analyses, **7-point** scales were used across majority of questions. That allowed to receive more precise and reliable validation of the tool. The size of the international visitors' sample collected, allowed to conduct further analyses across different visitor profiles.

INCLUDING:

- Nationality
- Country of residence
- Main purpose of visit
- Traveling group size
- Duration of the trip
- Destinations visited
- Expenditures in Saudi Arabia

This helped to provide marketing, commercial, visitor experience teams with insights supporting their respective initiatives in regard to communication, service development focus, experience improvement areas.

WE HAVE ESTABLISHED AN INFORMATION ARCHITECTURE TO MEASURE TOURIST EXPERIENCE IN A HOLISTIC WAY

TOPLINE METRIC

The topline metric is the KPI we are measuring and striving to improve

EXPERIENCE DRIVER

The three experience drivers orient leaders to systemic issues that influence the topline metric

OFFERINGS

Stakeholders can benchmark their performance by offerings to tourists

JOURNEY

Sub-journey metrics measure satisfaction with each iteration on a journey

SATISFACTION DRIVER

Satisfaction drivers (e.g. ease, courtesy) define the root causes of satisfaction within each touchpoint

SERVICE LEVEL KPIs

Service-level KPIs (e.g. waiting time) are the breakpoints at which satisfaction levels drop off

Customer satisfaction (CSAT)	Product	Entering & leaving KSA	I apply for the Visa on arrival	Ease	<5 mins
Net promoter score (NPS)	Price	Accommodation	I check-in to my flight (including luggage drop, ect)	Transparency	<10 mins
Customer Effort score (CES)	Service	Leisure and entertainment	I use airport WiFi, toilets, etc.	Speed	<20 mins
		Retail	I pass immigration and security check	Accuracy	>20 mins
		Mobility	I board my flight	Courtesy/ professionalism	
		[...]	[...]	[...]	

Figure 4. Measurement information architecture capturing holistic experience

CHALLENGE 03

Make actionable

Considering early development of the tourism sector in Saudi Arabia and expecting massive inflow of initial feedback post the visits to this "undiscovered" market, there was a strong requirement for the measurement system providing insights that drive actions,

prioritize areas of improvement, enable quick intervention planning. With that in mind, the design of the measurement tools required to be complex enough to provide comprehensive view on the situation, yet simple to digest required actions and quick in delivery of insights.

VISTOR EXPERIENCE INDEX-ILLSTRATIVE DASHBOARD

INPUT → | Surveys | Mystery Shopping | Other data streams

- ● Excellent (75+)
- ● Good <50-75)
- ● Average <25-50)
- ● Poor (Below 25)

VOICE OF TOURIST INDEX

	SATISFACTION	SERVICE DELIVERY	NPS	BRAND IMAGE
75	50	68	32	92

		OVERALL		Online content		Offline content		Inquiry opportunity	
Travel segment	👆 22	CSAT	Service	CSAT	Service	CSAT	Service	CSAT	Service
48 Sun & Sea	13	44	10	●	○	●	○	●	●
86 Adventure	18	34	12	●	○	●	○	●	●
23 Culture and Heritage	38	66	26	●	●	●	○	○	●

Improvement priorities:

1 | English guiding content　　**2** | Communication skills of staff　　**3** | Instant help response

🏠 Infrastructure　　ⓘ Information　　⚙ Accessibility　　🧗 Experience　　🎋 Hospitality

OUTPUT ← | Executive dashboard | Performance mangement | Performance by segment | Benchmark comparisons

Figure 5. Example of initial illustrative dashboard supporting prioritization and decision process per visitor segment
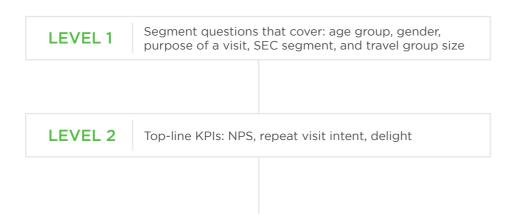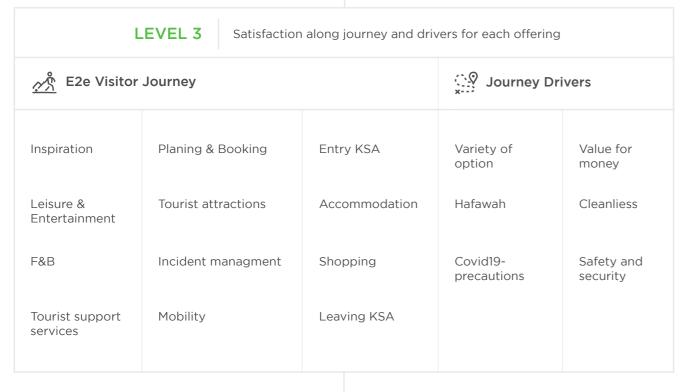
The tourism sector in Saudi Arabia has evolved dynamically and with the opening of the market to international visitors was expected to advance at an even higher pace. Therefore, any measurement tool designed required flexibility – allowing the addition of new offerings and services into the scope of measurement, and scalable to deliver outcomes at basic and advanced level.

Sustainability of the model that allows continuous measurement despite changing environment (change of visit patterns, development of the market, different tourism focus) was also one of the objectives, especially brought up at the Covid-19 pandemic shifts in the tourism sector focus in Saudi Arabia from Q2 **2020** (international to domestic).

THE VOICE OF VISITOR SURVEY GATHERS MEASUREMENTS ACROSS FOUR LEVELS

LEVEL 1	Segment questions that cover: age group, gender, purpose of a visit, SEC segment, and travel group size

LEVEL 2	Top-line KPIs: NPS, repeat visit intent, delight

LEVEL 3	Satisfaction along journey and drivers for each offering

E2e Visitor Journey			Journey Drivers	
Inspiration	Planing & Booking	Entry KSA	Variety of option	Value for money
Leisure & Entertainment	Tourist attractions	Accommodation	Hafawah	Cleanliess
F&B	Incident managment	Shopping	Covid19-precautions	Safety and security
Tourist support services	Mobility	Leaving KSA		

LEVEL 4	Visitation per site or destination: estimated through the sample as an indicator
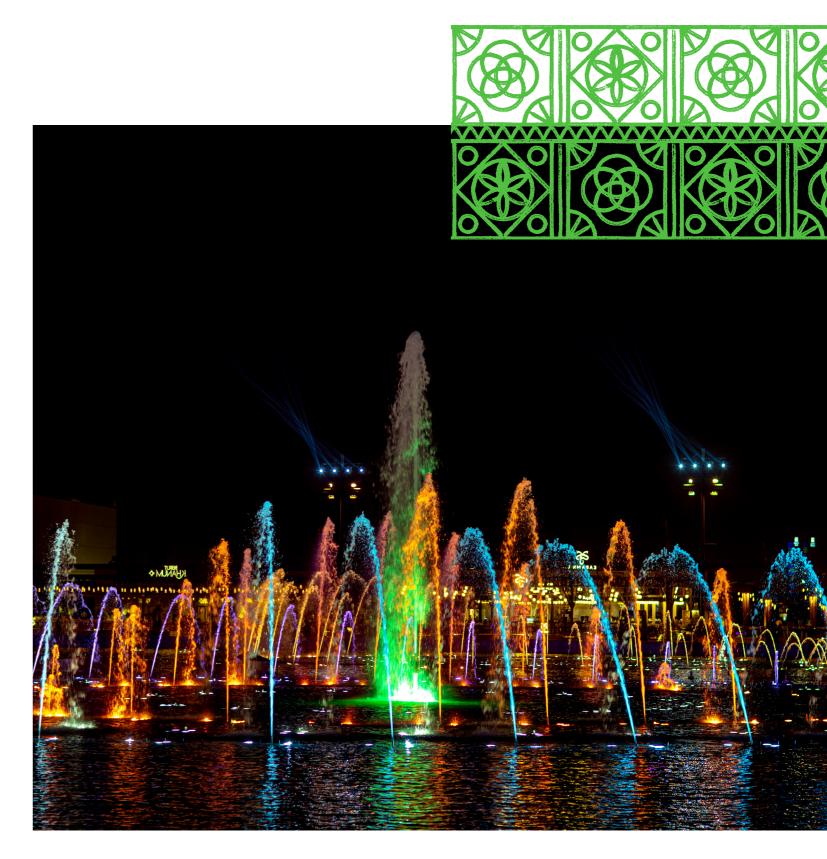
Figure 6. Current Voice of Visitor measurement plan reflecting end-to-end visitor journey

Figure 7. Simplified research study execution process

Learnings & Success

Listening to Voice of Visitors helps to understand what really matters during travelers' journeys and identify areas of potential improvements. Delivery of positive experience is a driver of visitor advocacy and spreading positive word of mouth, ultimately leading to more people visiting and staying longer in the country. When it is done right, Voice of Visitor tracking is a very effective tool to improve satisfaction, advocacy and intention to re-visit.

Voice of the Visitor measurement in its current shape, is the outcome of a solid and comprehensive process to develop a tool that provides insights of a total visitor experience journey, serving multiple stakeholders with relevant data, actioning improvement initiatives. We focus on identifying relevant touchpoints to dissect the visitor experience and recommend strategies, products and services, and other interventions that would support and uplift performance of various stakeholders in the tourism sector.

A SIMILAR PATH IS FOLLOWED EACH TIME RESEARCH IS CONDUCTED

Analyze results

Identify the main cuts and extract the data

Structure output

Weight the date if necessary

Prepare the raw data

Quality check the data

Receive the raw data back from agency

Execute fieldwork

Design the research

Decide to launch new research

SAUDI
TOURISM
AUTHORITY

الهيئـــة
السعودية
للسياحـة

MODULE 04

ENABLE
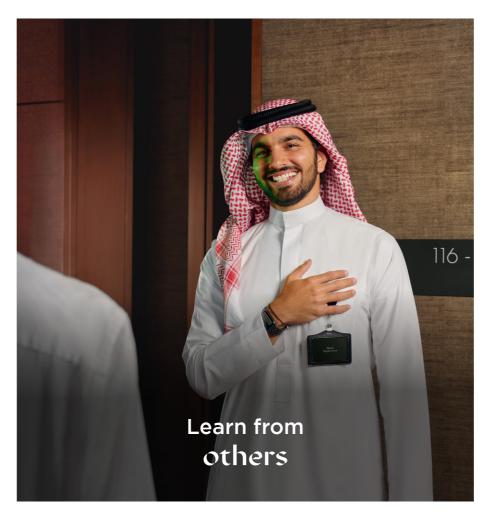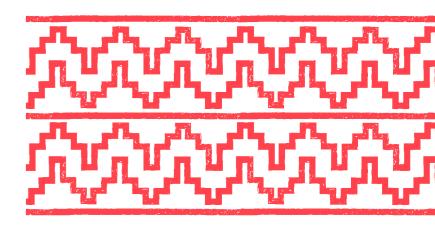
Build culture
amongst **frontliners**
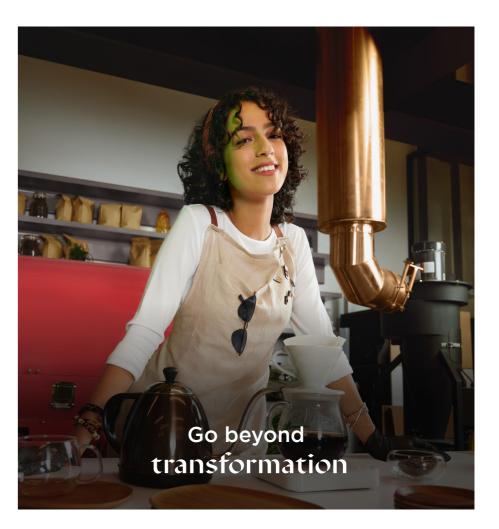
The objective of the Customer Experience (CX) module is to build culture amongst frontliners. Though in an Infant, large & complex setting like ours, certain challenges are prominent such as

"HOW TO...":

Listen to
understand

Learn from
others

Go beyond
transformation

Therefore, this module outlines the approach and learnings we can share.

Introduction

NATIONAL SCALE CULTURE PROGRAM
BASED ON THE TRUE SPIRIT OF ARABIAN HOSPITALITY

Arabian hospitality has been a part of Saudi's culture for millennia. The peninsula and its people have welcomed visitors and pilgrims from all around the world for over a thousand years.

In the ever more competitive global tourism industry, the negative experience of one guest could make global news. In this context, the emerging Saudi tourism industry faced an interesting challenge: How to develop a **'frontliner brand'** that is specific to the Kingdom.

STA took a human centered approach to addressing this challenge. This means understanding the individual visitor as a human being with their thoughts, feelings, desires, fears, and entire psychological makeup.

CHALLENGE 01

Listen to Understand

The very first step we took is to ask the question: what does our aspired culture look like? The clearer we make it to our frontliners how we expect them to behave, the easier it is for them to behave that way.

Disney has the **"Four Keys Fanatic"** service standards. Ritz Carlton has their Credo. Costa Rica has the **'Pura Vida'** – highlighting relaxation and the enjoyment of the little things in life.

So instead of developing the list of values/principles solely based on leading global destinations, we decided to look both externally and inward and went on an extensive listening tour to understand what strengths and beauty already exist in the culture today. This tour covered **12** major sources of insight.

THESE INCLUDED:
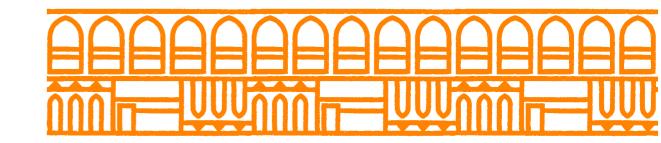
1 Interviews with the most experienced tour guides from the Saudi Tour Guide Association

2 Interviews with representatives from the Saudi tourism ecosystem – including hotels like the Ritz Carlton, transport providers like Uber and Careem and tourist attractions/destinations like Al Ula

3 A sweep of the global media to capture current international perception of Saudi culture

4 Engaging a Saudi author, expert and PHd in Saudi Culture - to understand the myths, stories, and forces that have shaped the Saudi culture over the centuries

5 Vision **2030**, in particular the National Character Program **(NCP)** Vision Realization Program **(VRP)** – which articulates the values transformation enshrined in the Vision

6 Input from senior leaders in the tourism ecosystem, including His Excellency the Minister

7 Survey input from all Saudi Tourism Authority employees

8 The culture of the leading global tourism related brands – like Disney, where we engaged with Darryl Speech **(Disney University and Institute CEX expert)** and Carl Holz **(former global CEO of Disney Cruises)**

9 Values of the leading global tourism destinations – for example speaking to experts on Singapore's tourism industry

We summarized the research into a list of over **50** tourism related values/attributes – such as friendliness, sincerity, trust and fairness.

Then we prioritized the list of **50** values/attributes based on frequency of mention across all **12** sources, and presented the results in a heatmap (tool attached below).

METHODOLOGY: THE HAFAWAH HAS BEEN DEVELOPED THROUGH A RIGOROUS PROCESS

STEP 01	STEP 02	STEP 03
Consolidate across 12 sources of insights	**Derive over** >50 tourism brand sub-attributes	**Prioritized and grouped** into 3 attributes
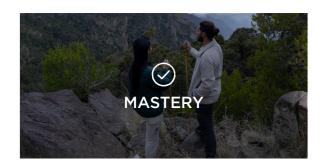
This resulted in three clear values that were mentioned by virtually all **12** sources – Mastery, Care and Generosity. These three values encapsulate the Hafawa.

MASTERY CARE AND GENEROSITY ARE THE 3 ATTRIBUTES THAT DEFINE OUR FRONTLINER TOURISM BRAND - AL HAFAWAH ASAUDIA

Al Hafawah ASaudia

The Spirit of Truest Arabian Hospitality

MASTERY

I care for and protect my guests...
...so my guests feel safe and taken care of

CARE

I am generous and hospitable...
...so my guests feel comfortable and among friends

GENEROSITY

I am determined & strive for mastery...
...to exceed guest expectations

It is not sufficient to just articulate the values. We also need to translate them into specific observable and measurable behaviors. Based on this insight, the **15** Saudi Hafawa behaviors were articulated.

WE TRANSLATED THE HAFAWAH BRAND ATTRIBUTES INTO 15 SPECIFIC BEHAVIOURS TO SET THE STANDARD FOR FRONTLINERS

**...I care for and protect my guests
so my guests feel safe and taken care of**

I listen... I repeat back what I heard to make sure I understand

I treat guest challenges as my own

I stand up for my guests

I ask and answer questions honestly, also the hard ones

I act predictably and respect personal space

**...I am generous and hospitable
so my guests feel comfortable and among friends**

I leave my guests with a smile and a story to tell

I am friendly and smile

I am eager to welcome

I introduce myself and offer assistance

**...I am determined & strive for mastery
to exceed the expectations of my guests**

I behave as an ambassador to my country

If I commit, I do it... If I can't, I explain why

I make it better (even if I didn't cause it)

I strive to perfect my craft

I am organized and on time

And then – validation. Working with the STA measurement team, we included Hafawa across the visitor journey touchpoints research and found that the difference in the NPS of international guests who did and did not experience the **3** attributes of the Hafawah varied by a whopping 94 points! Put differently, guests that did not experience any Hafawa attributes had an average NPS score of **-27** points. And those that experienced all **3** attributes on their visit had an NPS score of **+67** points[1].

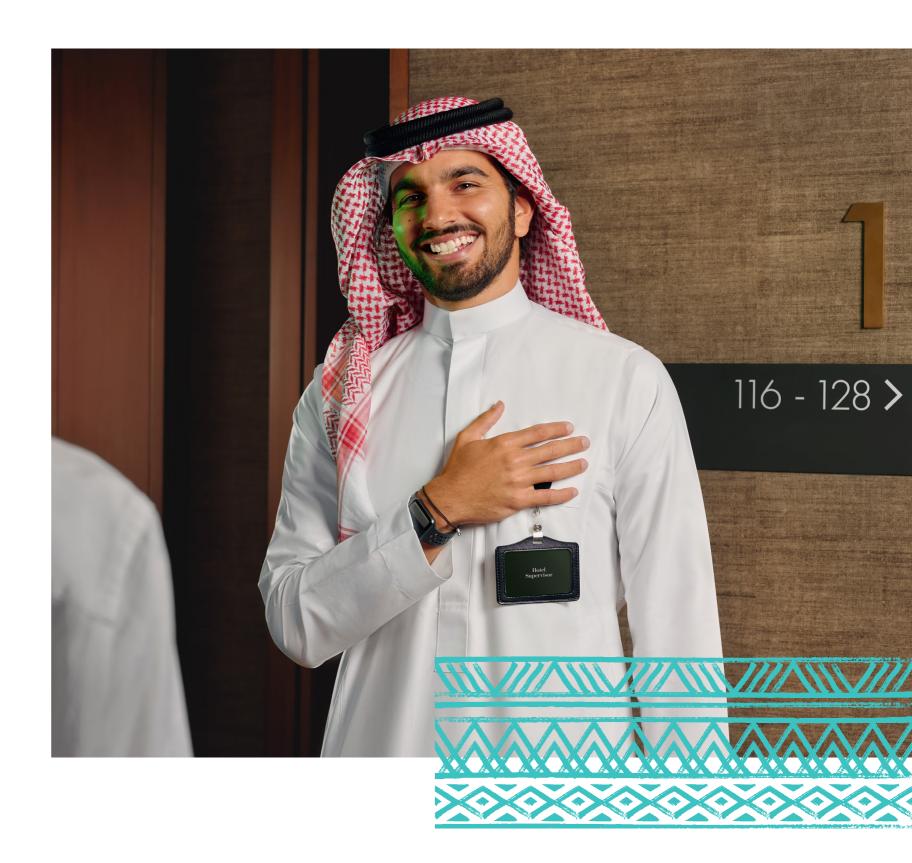[1]Note: Net Promoter Score (NPS) is measured on a scale of -100 (lowest score) to +100 (highest score)

CHALLENGE 02

Learn from Others

We identified, studied, and spoke to experts to understand **19** relevant examples from around the world,

INCLUDING

1 Candence Lightner, the founder of Mothers Against Drunk Driving (MADD), an organization which is recognized as catalysing the **50%** reduction of drunk driving deaths in the United States over a decade (saving over a million lives)

2 Garrick Cooper, senior lecturer in indigenous Studies at the University of Canterbury, to understand how New Zealand shifted from disregarding the Maori to honoring and integrating them as a core part of their national identity

3 Cheryl Lim, an expert on education in Singapore, to understand how Singapore developed the **"21st Century Competencies Framework"** anchored around **5** core values – and embedded a character learning goal into every class in every grade in the entire national education system from primary to post-secondary schooling

4 Tomas Bjorkmann, the co-author of **"Nordic Secret"**, to understand how about **10%** of the entire population of the Nordics went through an up to **6** month personal transformation retreat to find their **"inner compass"** and develop their character – catalysing the transformation of the society from a poor and agrarian to one of the most developed regions of the world

5 Paul Hockenos, political analyst and writer, and Steve Waddell, author and expert on whole systems change, to understand how Germany got on the path to becoming the **1st** major global economy to transition to renewable energy

As a second step, we looked at the available and relevant theory, academic research and leading frameworks that could help us understand and comprehend the success of the **19** examples covered above. The team identified **11** relevant theories.

INCLUDING

1 Otto Schramer's systems change Theory U developed at **Massachusetts Institute of Technology (MIT)**

2 Donella Meadow's timeless **12** leverage points developed in the context of countering global climate change in the **1970**s

3 McKinsey's four quadrant influence model for designing change programs

4 David J. Snowden's Cynefin complexity framework to understand that we are dealing with a complex, not a complicated problem

5 Many others including positive psychology **(Martin Seligman)**, nudge theory and behavioural economics **(Thaler and Sunstein)** and tipping point research **(Malcom Gladwell)**

In the third step, we brought the practical experience and academic research outlined in the first two steps above together, and based on them articulated a set of principles that shed light on how to create culture change at scale.

11 GUIDING PRINCIPLES SHAPED THE DEVELOPMENT OF THE HAFAWAH THEORY OF CHANGE AND CHANGE MODEL

1 Leverage all four quadrants of the influence model so as to increase chances of success by **8X**

2 Make the transformation personal to a critical mass of leaders by letting go to letting come.

3 Co-create at scale by identifying all the stakeholders who are acting for change and involving them in shaping the direction of the change

4 Focus on a few highest leverage points and maintain focus overtime

5 Target the meaningful **20%** of individuals in a population to make the change impactful

6 Take a different approach for different problems by testing and seeing what works then learn from it

7 Action learning over planning: start small, move fast and learn over time

8 Identify the existing strengths and virtues and use them as building blocks for change

9 Use exciters and simplifiers instead of carrots and sticks when intervening

10 Maximize experience feedback so as to enable learning from experience

11 Measure progress leveraging advanced analytics to process big data generated by the system **(v.s. generating new primary data)**

12 Maintain a systems view and working with the ecosystem to build a transformation system that's aligned with existing actors and their initiatives

13 Shifting societal metanarratives and memes to impact the mental structures through information and language

Finally, we used these principles to develop our unique theory of change – one that is rooted in best practice, but tailored to the specific challenge and scale of opening up Saudi Arabia to the world.

CHALLENGE 03

Go beyond transformation

The Hafawah Change Model is based on a 3-step process:

1 | Understanding our frontliners

2 | Understanding their mind sets

3 | Catalyzing a social movement across the ecosystem to bring Hafawah to life

UNDERSTANDING OUR FRONTLINERS

We decided to begin with an understanding of who our frontliners are. This allowed us to identify ~70 different and specific types of roles that the entire tourism ecosystem delivers from the guest's perspective. These roles vary from tour guides to store cashiers and emergency call center employees.

We then profiled each of the roles to understand where each of these frontliners worked – what the largest ministries and businesses that make up this particular role, and what is their rough size.

The team then prioritized the frontliners based on data sources we had access to from the **STA** measurement team. The two prioritization criteria are:

1 | The impact of the associated touchpoint in shaping the overall experience of the average tourist.

2 | The level of importance of the interaction with frontliners in shaping the overall tourist experience. Based on this we identified **70,000** priority frontliners in **15** roles.
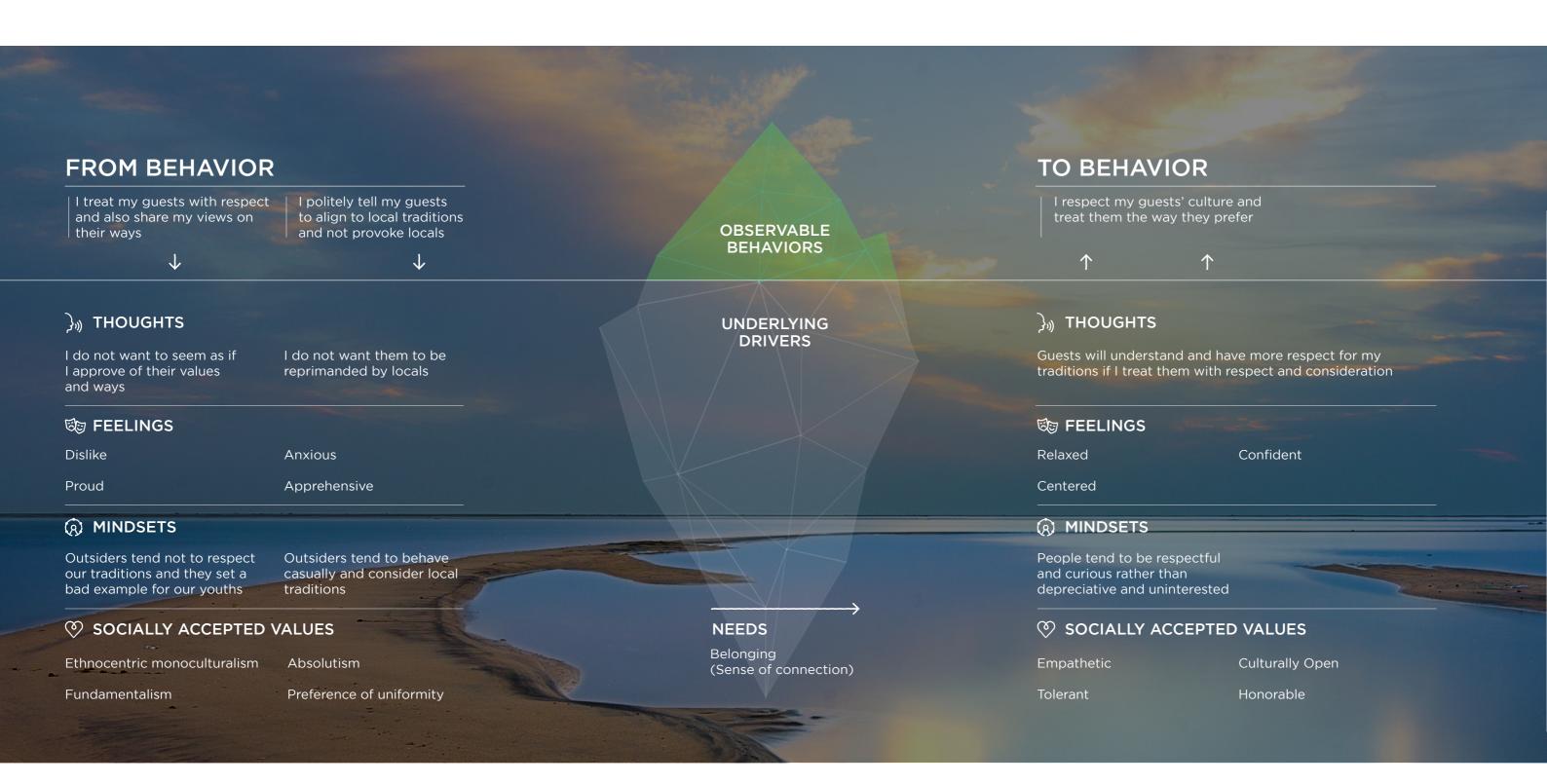
Finally, to focus further, the team then mapped the frontliners to the behaviors that are most relevant to them – or better said the behaviors that are most likely to generate a visitor moment of delight given the specific frontliner role in question.
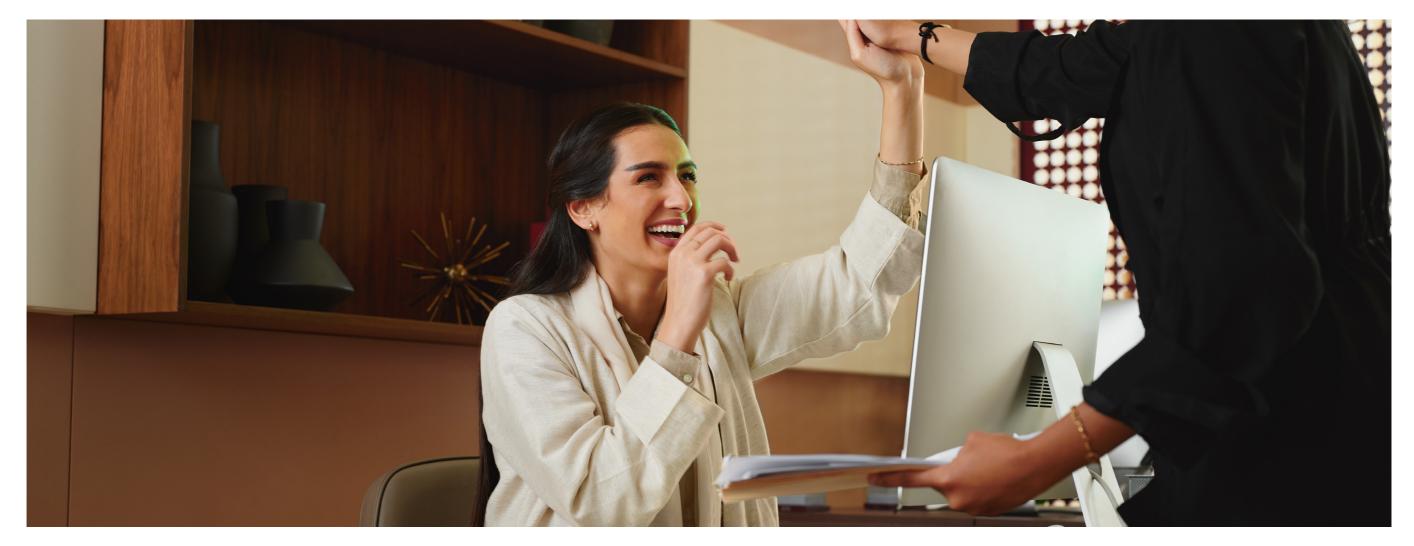
UNDERSTANDING FRONTLINER HAFAWAH RELATED MINDSETS

Transfiguration happens at the root cause mindset level. Therefore, it was critical to invest the time to understand the common cultural mindsets, thoughts and feelings that are related to the 15 Hafawah behaviors. See example for one of the 15 Hafawah behaviors below.
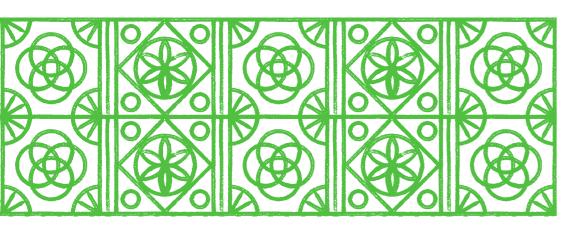
FROM BEHAVIOR

I treat my guests with respect and also share my views on their ways

I politely tell my guests to align to local traditions and not provoke locals

↓   ↓

OBSERVABLE BEHAVIORS

TO BEHAVIOR

I respect my guests' culture and treat them the way they prefer

↑   ↑

THOUGHTS

I do not want to seem as if I approve of their values and ways

I do not want them to be reprimanded by locals

UNDERLYING DRIVERS

THOUGHTS

Guests will understand and have more respect for my traditions if I treat them with respect and consideration

FEELINGS

Dislike   Anxious

Proud   Apprehensive

FEELINGS

Relaxed   Confident

Centered

MINDSETS

Outsiders tend not to respect our traditions and they set a bad example for our youths

Outsiders tend to behave casually and consider local traditions

MINDSETS

People tend to be respectful and curious rather than depreciative and uninterested

SOCIALLY ACCEPTED VALUES

Ethnocentric monoculturalism   Absolutism

Fundamentalism   Preference of uniformity

NEEDS

Belonging
(Sense of connection)

SOCIALLY ACCEPTED VALUES

Empathetic   Culturally Open

Tolerant   Honorable

CATALYSING A SOCIAL MOVEMENT ACROSS THE ECOSYSTEM TO BRING HAFAWAH TO LIFE

At this point we had a very strong foundation, based on which we could move into action. As a next step the team identified the most relevant framework to use to organize our initiatives. It includes five categories of initiatives:

THE FRAMEWORK INCLUDES CATEGORIES OF INITIATIVES

1 Helping specific frontliner roles build the Hafawah skills and capabilities focusing on the **2-3** Hafawah behaviours most relevant to their role

2 Inspiring the frontliners by communicating Hafawah to them

3 Role modelling of Hafawah by people specific frontliner groups look up to

4 Aligning incentives, policies and processes in a way that will celebrate and reward the frontliners for living Hafawah

5 Inner development transformation journeys to open the minds, hearts and will of a critical mass of frontliners

Learnings & Success

As a part of pioneering the next generation CX program for an entire country, the Hafawa program is of course only one of the many contributing factors driving forward national and industry level outcomes. This is especially true when major industry segments (like international leisure visitors) are being created from a very low base. Supporting the cultural evolution at the scale of millions of people is humbling, to say the least. The examples we studied suggest it takes the better part of a decade to see significant results, and decades until the aspired culture is truly embedded.

Tracking impact of a program of this complexity is challenging. The approach we are currently taking is a multi-level approach – looking at impact through five different lenses, that expand from the smaller and more tactical lenses to the broader and more systemic perspectives. In some cases, some of the levels also logically link and flow together.

THE LENSES ARE:

1 The concrete work **STA** is doing to launch Hafawa related initiatives mentioned in the the 3rd pillar, together creating a coherent portfolio of interventions – and if they have impact, our guests will experience it

2 How many of our guests experienced the Hafawa attributes during their stay – each attribute individually, and all **3** attributes taken together – and if our guest experience the Hafawah more

3 The **NPS** score of the guests who experienced, and those that did not experience the Hafawah – and we would expect that those that experienced the Hafawa would have a higher **NPS** score

4 The overall **NPS** score across segments – and if the **NPS** score increases, we would expect the **NPS** to be one of the many factors contributing to an increase in the overall industry level success/outcome metrics

5 The ultimate overall industry metrics – in particular the number of visits and total visitor spend – and the ultimate contribution to **10%** of the economy **(~$100bn)** by **2030**

Acknowledging there is still a long path ahead, we are encouraged to see early signs of progress in a main focus segment – international leisure tourists - as seen in our measurement and social listening.
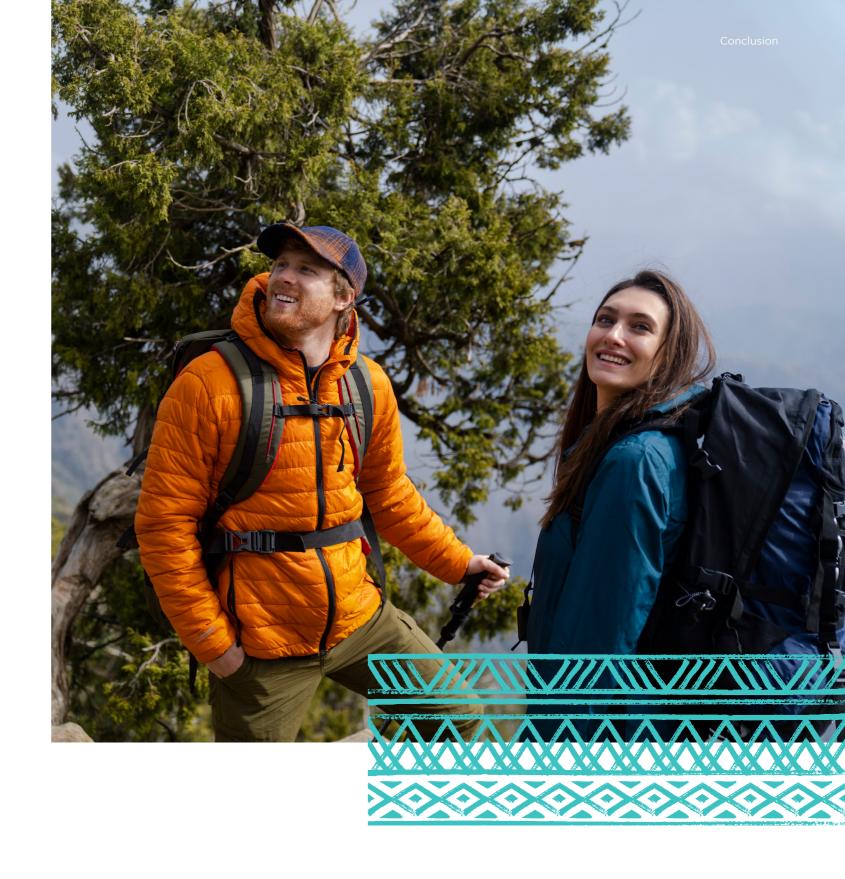
Conclusion

When the **Saudi Tourism Authority** embarked on this journey back in June **2019** it quickly became clear that in order to achieve our goals – ambitious and unprecedented in many ways – we would have to adopt a variety of different perspectives and mindsets and with an iterative approach that pointed towards incremental success.

With the publication of this first version of the case study, we believe we have reached a milestone in this pioneering effort effecting CX at scale for an entire country. The four modules in this approach as outlined in this study are the foundation that we will build from as we continue to refine, evolve and if needed, reimagine our approach with a clear goal in mind – to welcome the world to Arabia.

While we continue to grow this effort, we would like to encourage CX practitioners and enthusiasts to always take a holistic approach as you embark on a complex customer experience program. This case study can provide guidance and learnings relevant for almost any destination, program, or organization.

If you would like to remain in touch please follow-us on:

 STA channels   https://www.sta.gov.sa/en/visitor-experience

Acknowledgements

There are countless people who were behind this monumental effort and who will continue to confirm and inform this study who we are grateful for. A few notable mentions **include:**

1 The leadership of the Kingdom Saudi Arabia and the stewards of Vision **2030** which have made all this possible

2 The leadership of **Saudi Tourism Authority** including the CEO, CXO and CPO; alongside colleagues in Visitor Experience (a.k.a. Experience Development) and other STA cross-functional peers

3 Tourism sector stakeholders from public and private sectors

4 Partners and vendors that have served the program directly or indirectly

5 The co-authors and other colleagues, partners and friends that contributed to this case study directly or indirectly

6 Friends and enthusiasts of "tourism" and "customer experience", both near and far

Index: Deep dive into the Journey Map

PLANNING & INSPIRATION

POTENTIAL DATA SOURCES

MEDIA REACH AND AWARENESS
- Paid media reach and frequency
- Campaign awareness lift studies
- KSA 'places I would like to visit' survey lift — aided and unaided

SOCIAL FAN/FOLLOWING DEMOGRAPHICS
- Diversity in GEO locations
- % growth in target audience
- % penetration in key markets

SEO/SEARCH TRENDS
- Volume of searches for KSA keywords
- FAQs/most common queries
- Competitive search rankings
- (vs. other tourism searches)
- Reputation management
- (top results/articles, reviews)

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ONLINE BOOK SALES - (VIA PARTNERS)
- Online retailer data for book sales (i.e. Amazon)
- KSA website brochure downloads

PARTNER DATA (WHERE AVAILABLE)
- Online retailer data for book sales (i.e.Amazon)
- KSA website brochure downloads

OWNED CHANNELS
- Social profile fans/following
- Social content engagement
- Website traffic
- Email/newsletter sign-up
- CRM engagement (open rates, CTR, etc)
- Customer database (names, contact, home address)

KSA TOURISM SITE TRAFFIC
- Page views/articles read
- Application downloads

REVIEWS/ RECOMMENDATION SITES
- Number of reviews, listings of KSA
- attractions, hotels, restaurants, etc.
- Lift in positive ratings on sites like
- TripAdvisor
- Local AND tourist reviews

PR/MEDIA COVERAGE
- Increase number of articles by mainstream
- media
- Traffic/view of articles
- Increased PR page visits/downloads

SOCIAL LISTENING
- KSA and tourism mentions
- Competitive destination SOV (EMEA)
- KSA net sentiment, sentiment drivers
- Positive media/PR coverage
- Influencer mentions/posts
- Visual UGC (e.g. Instagram and YouTube)

ADVANCED AIRPORT TRACKING?
- Volume of searches for KSA keywords
- FAQs/most common queries
- Competitive search rankings
- (vs. other tourism searches)
- Reputation management
- (top results/articles, reviews) visits/downloads

VISITOR NEEDS

- 'I want to experience something profound, exciting and new'
- 'I need to know how expensive Saudi Arabia actually is to see if we can afford it'
- 'I need to be inspired and see more about the destination to decide if I really want to go'
- 'I need to convince my family to go to KSA'

VISITOR JOURNEY

- I am aware of KSA as a destination
- I get attracted to KSA as destination
- I research on KSA as a tourist destination
- I research travel options
- I plan my itinerary

INSPIRATION & PLANNING

Create a desire to visit KSA and increase conversion on content

EMOTION MAP

🙂

Since the introduction of eVisa and the opening of the doors to the world, a lot of content has been created on different platforms to facilitate the immersion in the unknown country Saudi Arabia

🙁

People may be unfamiliar or misinformed, and may not have a straightforward manner for reassurance /validation for Saudi as a prospective touristic destination

TOUCHPOINTS

PAID
- Magazine advertorial
- Ad campaigns
- SEO paid search
- Social media influencers
- Expos

OWNED
- visitsaudi.com
- Official KSA Social Media
- Brochures

EARNED
- Travel blogs, sites & apps
- Travel agents
- Review sites

- Travel guidebooks
- Magazines
- Package tour offers
- Shared accomodation sites
- Aggregator / Comparison Sites
- Hotel partner sites

OTHER
- University / Cultural exchanges
- Friends, family & colleagues

INTERVENTIONS

- Offer curated adventure activities for advance booking on VisitSaudi #Services #Communication

ENTITIES

- VX Organizing Team
- SAUDIA
- National Transformation Program (NTP)
- Saudi Travel and Tourism Association (STTA)
- General Entertainment Authority (GEA)
- Saudi Tour Guides
- Saudi Accommodation Facilities
- Saudi Heritage Preservation Society – Museums
- National Committee for Tourism, Events and Entertainment at Saudi Riyadh Chamber
- General Culture Authority
- Ministry of Culture
- Ministry of Media
- Associations of Hotels

PAIN POINTS

- **DESK RESEARCH**
  Potential visitors cannot envision Saudi cities or landscapes
- **DESK RESEARCH**
  Lack of books, guides and magazines about visiting KSA
- **GOOGLE**
  KSA Website doesn't show in first results page
- **INTERVIEWS**
  Potential visitors are concerned about safety

- **INTERVIEWS**
  KSA is less appealing to women with the current social norms
- **AWE**
  Information needs about the country and its culture are currently not met
- **INTERVIEWS**
  Potential visitors thought that Saudi Arabia could be very expensive as other Middle Eastern countries are luxury destinations