



Diagnostic on visitors' experience at the destination: The example of Qatar

USE CASE



Background

The first year of the pandemic has meant an unprecedented drop in the number of tourists, and therefore in revenue. As vaccination rates rise, and countries reach the dreamed group immunity, destinations will intensify their battle to win back their customers, building on their strengths to attract new post-Covid visitors.

Excellent customer experience in the destination, at different levels (i.e. satisfaction with activities, accommodation, perception of safety, etc.) will be even more important than at the beginning of the pandemic.



Objective

Establish Qatar visitors' overall satisfaction, identifying customer experience value creators and pain points, and comparing those with some neighbouring competitors like Dubai or Muscat

Assessing whether Qatar tourism policies are having a positive impact on customer satisfaction.

Mabrian can help destinations identify opportunities and areas for improvement to deliver a rich and satisfying experience, while monitoring visitor interest and sentiment to understand whether destination policies are having the desired impact.

Mabrian's value added

Mabrian's platform combines interest and satisfaction indicators to provide a full picture of the evolution of customer satisfaction at the destination



Product satisfaction

Degree of satisfaction with the destination's products. The index results of the analysis of language sentiment for each product.



Hotel satisfaction

Level of satisfaction with hotel accommodation and different aspects of its experience through Natural Language Processing (NLP) of hotel reviews.



Security perception

Indicator representing the existence of a number of comments in customers' mentions referring to security issues



Climate perception

Indicator representing the extent to which climate issues impact on customer satisfaction. Based on NLP of mentions dealing with climate issues.



Product interest

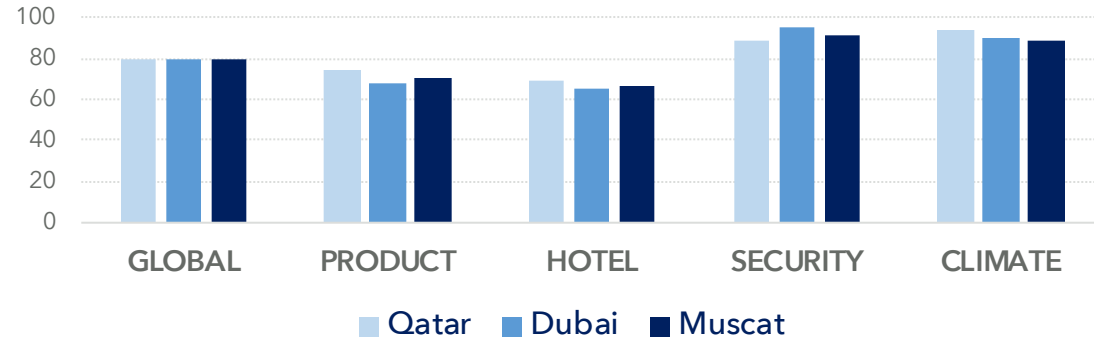
Share of social tourist mentions for each product, indicating the interest it generates



Qatar's Visitor Satisfaction 2019 (1 to 100 points)



Qatar's Visitor Satisfaction compared to Dubai and Muscat:



- Overall visitor satisfaction with Qatar is high, in line with Dubai and Muscat.
- Qatar performs slightly better in climate perception and product satisfaction.
- Its ratings in security perception are a little below, and this may be partly due to the way in which Qatar is sometimes portrayed in international media.

Degree of contribution of different customer experience aspects to Qatar's overall visitor satisfaction (1 to 100 points)	<p style="text-align: center;">Low >60 points</p> <p style="text-align: center; background-color: red; color: white; padding: 5px;">Pain points</p>	<p style="text-align: center;">Medium 60>75 points</p> <p style="text-align: center; background-color: yellow; padding: 5px;">Value creators</p>	<p style="text-align: center;">High >75 points</p> <p style="text-align: center; background-color: green; color: white; padding: 5px;">Value creators</p>
<p>Product Satisfaction Indicators</p> <p><small>*Nightlife here can be mostly understood in the sense of private parties and chill out areas of hotels</small></p>	<ul style="list-style-type: none"> • Active life style 	<ul style="list-style-type: none"> • Wellness • Arts & Culture • Nature 	<ul style="list-style-type: none"> • Food & Cuisine • Shopping • Family Activities • Sunbathing • Nightlife
<p>Hotel Satisfaction Indicators</p>	<ul style="list-style-type: none"> • Staff • Food • Cleanliness • Drink • Entertainment • Room • Reception 		<ul style="list-style-type: none"> • Location

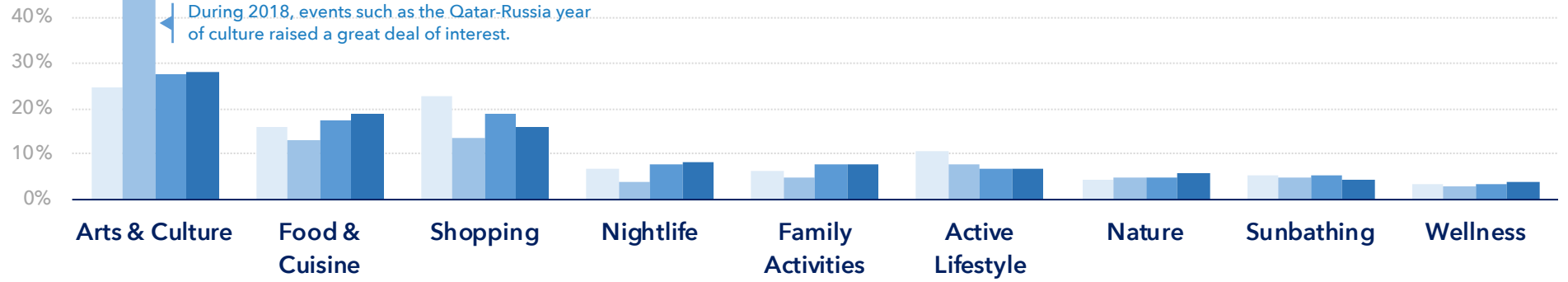
- In general, **tourism activities experienced at Qatar** (i.e. dining, shopping, etc.) are **sources of value** for customers, while climate and security are neutral.

- Except for their location, most **pain points for visitors have to do with their stay in hotels.**



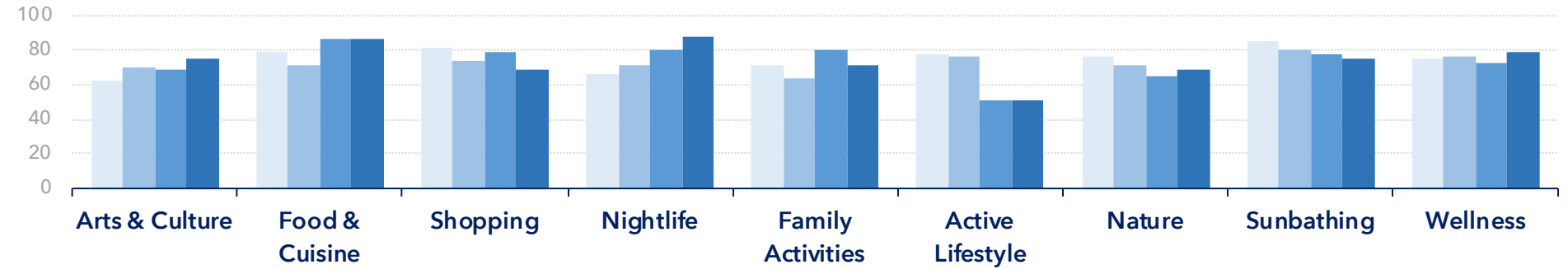
Qatar MENTIONS BY PRODUCT EVOLUTION

2017 2018 2019 2020



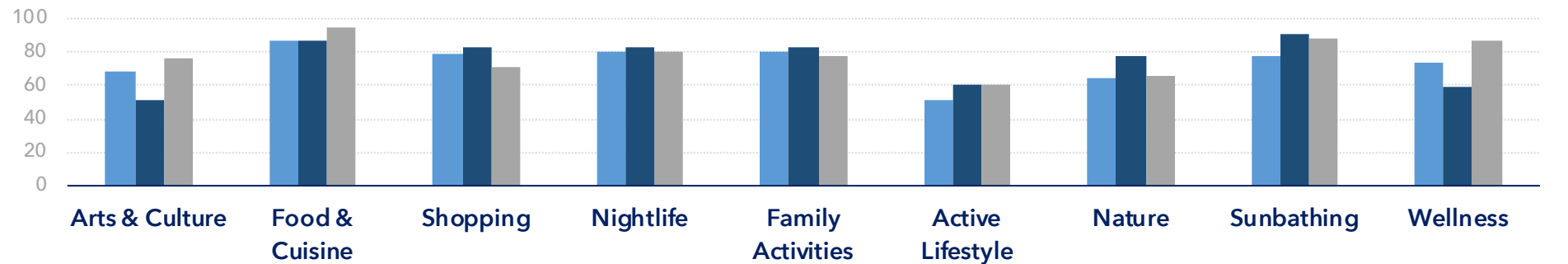
Qatar SATISFACTION BY PRODUCT EVOLUTION

2017 2018 2019 2020



Qatar vs. Competitors SATISFACTION BY PRODUCT 2019

Qatar Dubai Muscat



Note: Satisfaction indicator for 2020 can be impacted in some cases by COVID-19 pandemic, as tourist services have not been fully operational. Therefore, satisfaction indicator is based on sentiment for 2019



Arts & Culture related activities generate most mentions and it seems Qatar's strategy regarding this product is having a positive impact.



Gastronomy generates interest and high satisfaction, which is improving, sitting at the same level as Dubai or Muscat.



Shopping also generates a good deal of interest, and on this activity Qatar performs above Muscat but slightly below Dubai.



Nature related and active lifestyle activities represent a gap in interest and satisfaction for Qatar and competitors in general.



Wellness generates little interest when compared to other more mainstream activities but satisfaction is increasing and Qatar performs significantly better than Dubai.

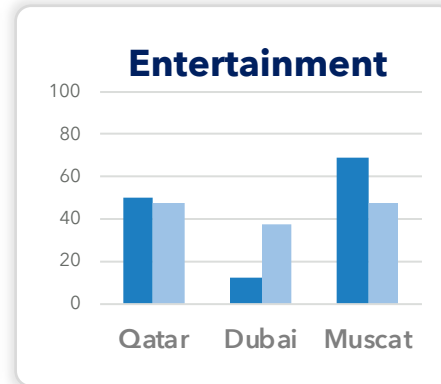
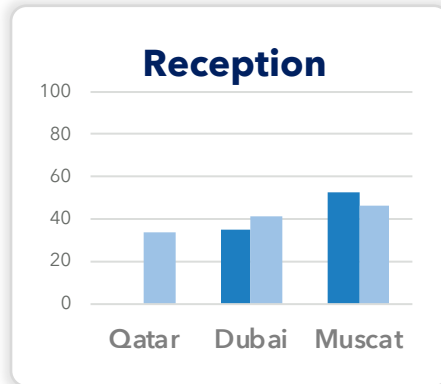
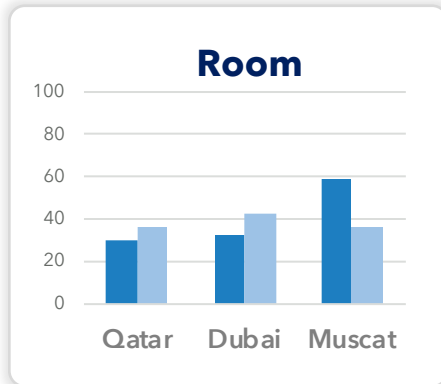
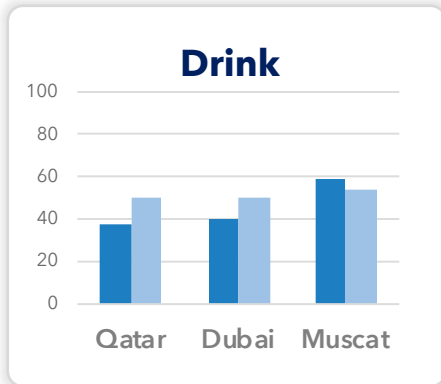
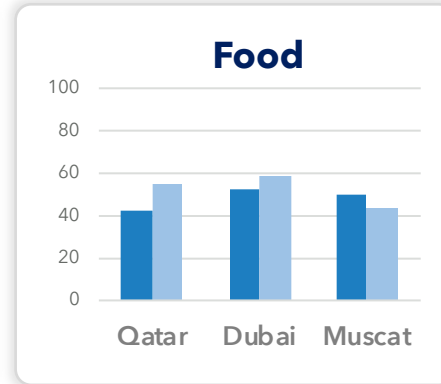
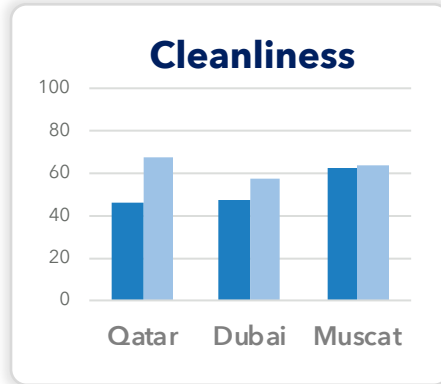
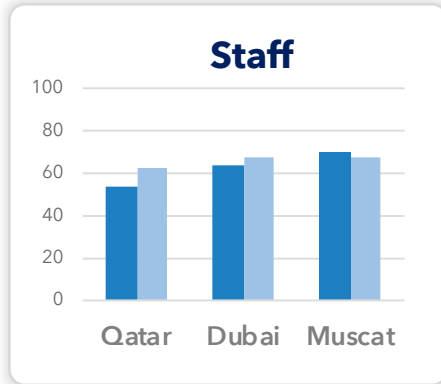
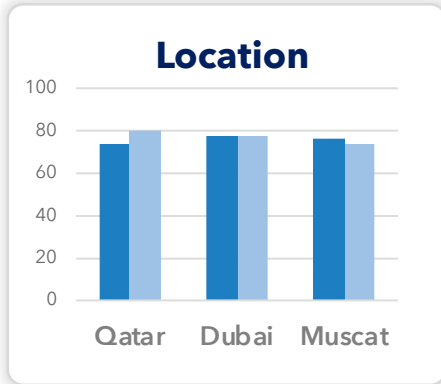


Family activities do not generate much interest, although sentiment is not negative and this is a large market in the region.

Visitors' satisfaction with different aspects of hotel's customer experience

2019 (1 to 100 points) ⁽¹⁾

■ Total ■ 5 Star



- In general, **hotel accommodation does not add much value to customer's experience** at any of the destinations.
- Location is the only aspect which is highly valued.
- **All destinations perform poorly in important aspects, especially given COVID-19, such as cleanliness, staff and reception.**

(1) Satisfaction Index calculated with markets providing most reviews for the destination

(2) n.a. : Low number of reviews does not advise providing a result

KEY TAKE OUTS

1

Arts & Culture activities generates most mentions, and although satisfaction is good and rising, there is still room for improvement if Qatar wants it to become a key aspect of its Unique Selling Proposition. Data shows how events help in generating extra buzz on a product. However, for the post-Covid traveller, it will be essential to manage flows at main cultural tourist attractions.

2

In gastronomy and shopping, two important activities for the region in general, Qatar should aim at keeping a situation of parity in terms of satisfaction.

3

Family leisure, an important activity in the region, obtains a good satisfaction index, but could attract more interest if options available were further promoted.

4

Nature related and active lifestyle activities represent a gap in interest and satisfaction not only for Qatar but also for neighbouring destinations. With customers valuing destinations offering an all-in experience and post-Covid travellers demanding outdoor activities, working on this part of the offering will become very important.

5

Wellness related activities are valued by visitors' in Qatar, and this is another side of the offering which could get more marketing attention.

6

In terms of hotel accommodation, working to raise the level of satisfaction with all aspects, especially cleanliness, will be essential for any destination in the post-Covid era.

With Mabrian you can drill down on the indicators analysed in this use case to gain more precise insights



Thank You!