



Your partner in tourism demand analysis and anticipation

Tourism Barometer

Mediterranean countries: France, Italy, Spain and Greece

Summer 2023

Analysis of destination performance - Mediterranean countries

Tourist perception index for international visitors

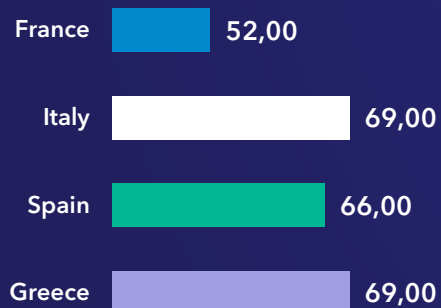
Tourist Product Satisfaction



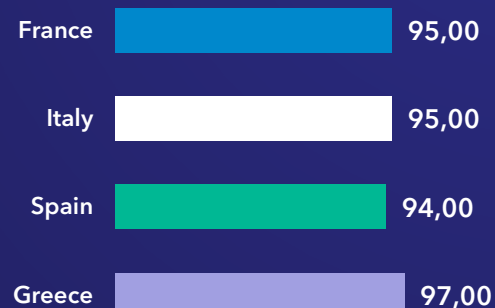
The four main Mediterranean destinations experience high levels of satisfaction in terms of safety and climate.

The tourism offerings in these destinations are generally satisfactory. In contrast to **France** and **Spain**, **Italy** and **Greece** stand out in this respect.

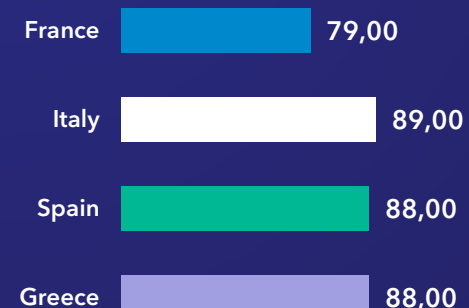
Hotel Index



Safety Perception



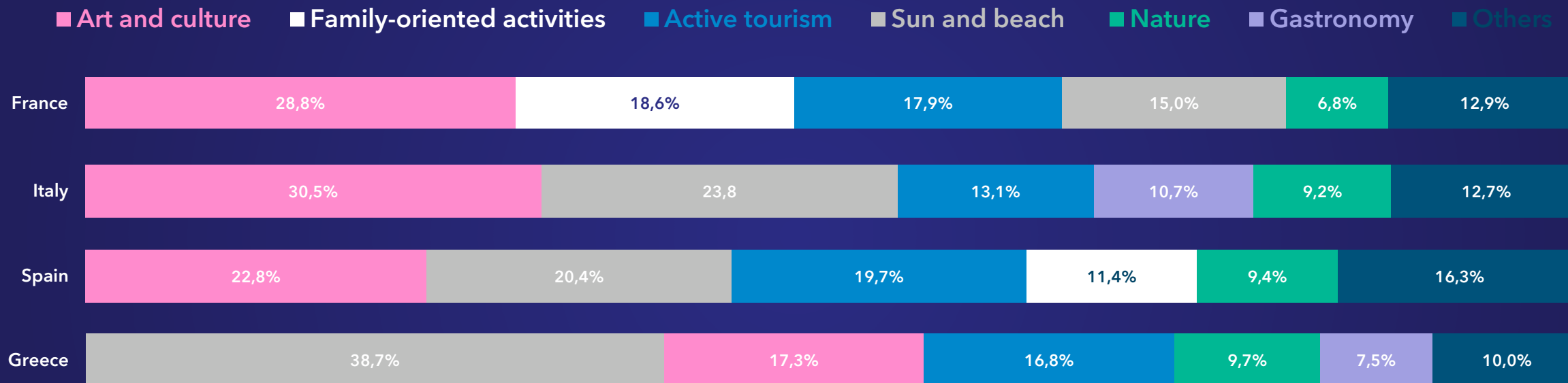
Climate Perception



Regarding the hotel options, **Greece** receives the highest appreciation from travellers, while France is considered less satisfying. **Italy** and **Spain** have similar levels of satisfaction in this area.

Analysis of destination performance - Mediterranean countries

Distribution of the top 5 tourist interests



The main motivations for travelling to Mediterranean destinations are quite similar. Cultural products, beach and seaside activities, nature, and active tourism are among the main attractions.

It is interesting to note that tourists in **France** and **Spain** experience a greater variety of family-oriented activities, whereas those in **Greece** and **Italy** are more enthusiastic about local gastronomy.

Analysis of destination performance - Mediterranean countries

Destination performance by key air connectivity indicators

Country	Arriving airline seats	Seat evolution % vs 2022			International vs Domestic capacity
		Total	International	Domestic	
France	30.85M	+9.9%	+14.2%	-3%	
Italy	35.09M	+6.5%	+13.3%	-4.2%	
Spain	43.33M	+7.2%	+8.6%	+4.2%	
Greece	16.66M	+4.2%	+3.8%	+5.5%	

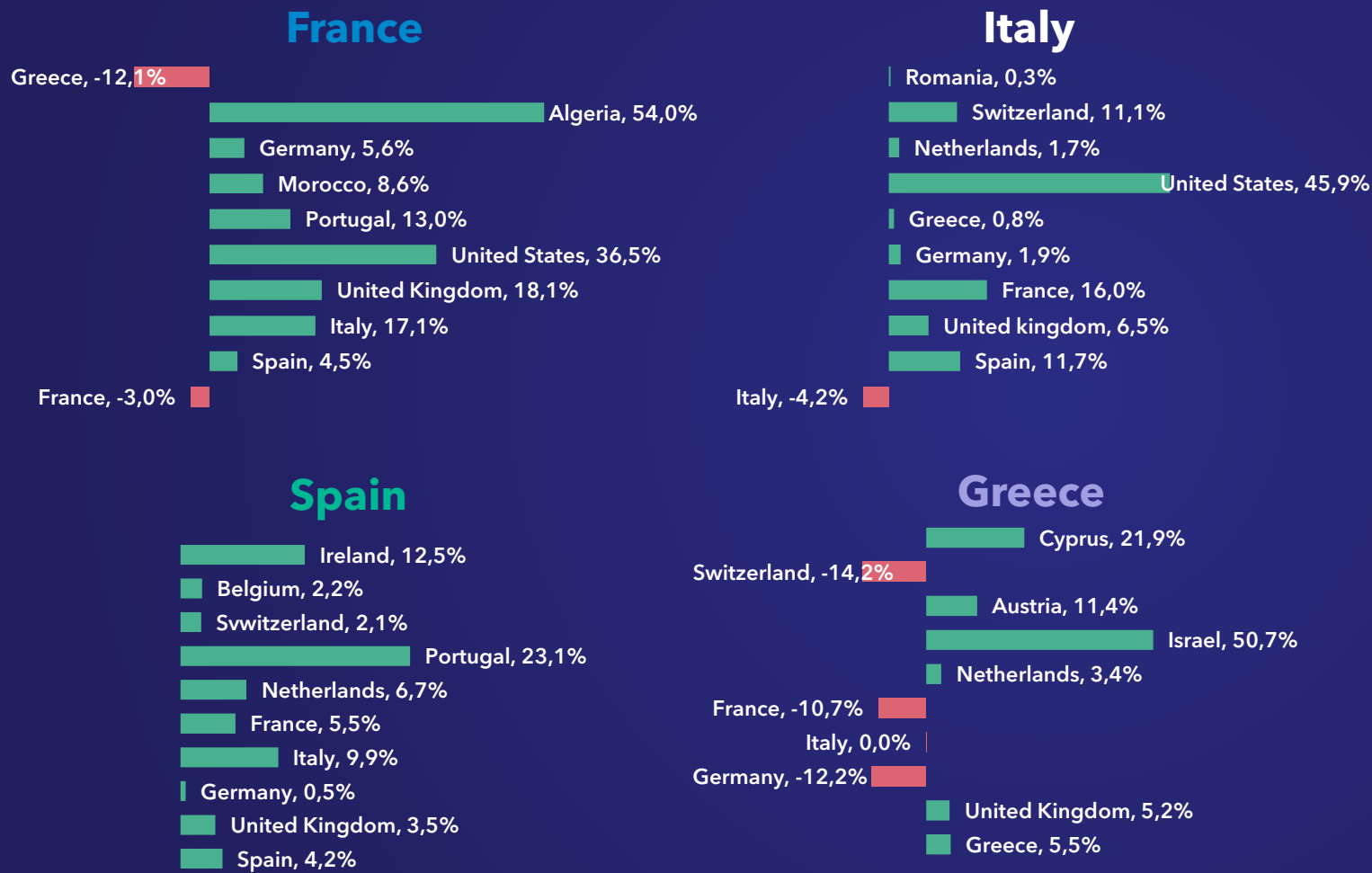
■ International
■ Domestic

Regarding air connectivity, the four destinations have increased their capacity for the summer of 2023 compared to the previous year.

France and **Italy** have increased the number of international flights while their domestic capacity has decreased. Both **Spain** and **Greece** have increased their international and domestic capacity.

Analysis of destination performance - Mediterranean countries

Capacity developments by origin



With increased accessibility, Mediterranean destinations are actively competing to capture the attention of travelers from the **United States**. **France**, **Italy**, **Greece**, and Spain are taking measures to attract this key market and increase air connectivity.

France and **Italy**, which already had good connectivity with North America last year, have increased their seat capacity by **36%** and **45%**, respectively.

The capacity of direct routes between the **United States** and **Spain** and **Greece** has grown by roughly **20%**. Even though the **United States** is not one of the top ten source markets for these destinations, an increase in demand has been observed.

Analysis of destination performance - Mediterranean countries

Hotel price benchmark



Across all destinations and hotel categories, there has been an upward trend in hotel pricing. The countries with the highest prices are **France** and **Italy**, while **Spain** stands out as the most affordable option. In comparison to 2019, **Greece** has experienced the greatest price increase. This year, travellers interested in staying in 5-star hotels will have to pay **123%** more compared to the summer of 2019.

The increase in prices is due to the opening of numerous 5-star hotels in recent years, a strategic change that has also attracted a different type of traveller to the country. Despite this, **Greece** remains the most satisfying destination in terms of hotel offerings.

Sources and Definitions

Index definitions

Index of Tourist Products: *Measures the destination's level of satisfaction across various categories, including culture, gastronomy, wellness, etc. This indicator is obtained by analysing the distribution of positive, neutral, and negative comments and mentions related to each existing category.*

Safety Perception Index: *Measures the level of safety perceived by travellers in the destination. It is based on the analysis of mentions and opinions on social networks and websites through natural language processing.*

Climate Perception Index: *Measures the level of satisfaction of visitors regarding the climate of their destination. It is measured by the number of negative mentions or comments. A high number of negative comments impacts the level of satisfaction, whereas fewer negative comments indicate higher satisfaction. This indicator facilitates a deeper comprehension of the relationship between visitor expectations and the climatic reality of the destination.*

Accommodation Satisfaction Index: *Indicates the level of visitor satisfaction with 3, 4, and 5-star hotels in a particular destination. It is based on the analysis of reviews from platforms such as TripAdvisor, Expedia, and Booking.com.*

Index scale

The satisfaction indicator and its constituent indices are measured on a scale ranging from 0 to 100 points. Here is a breakdown of the satisfaction levels:

0 to 24 points: *Very low level of satisfaction. The issues identified by the index should be addressed as a priority.*

25 to 49 points: *Relatively low level of satisfaction. There is significant room for development.*

50 to 74 points: *High or very high level of satisfaction. There is moderate room for improvement.*

75 to 100 points: *Excellent level of satisfaction. There may be some remaining areas for improvement, but overall, maintaining and consolidating the acquired points is sufficient.*

Sources



Flight search: *Travelport*

Hotel rates: *TripAdvisor*

Social network: *Twitter, Instagram, TripAdvisor*

Hotel reviews: *Expedia.com, Booking. Com, TripAdvisor*



Lets Talk!

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