



MABRIAN

In collaboration with Katalysts & ∞

Tourism Barometer

Middle East

October 2023

Global Tourist Perception Indexes for international visitors

Global Satisfaction



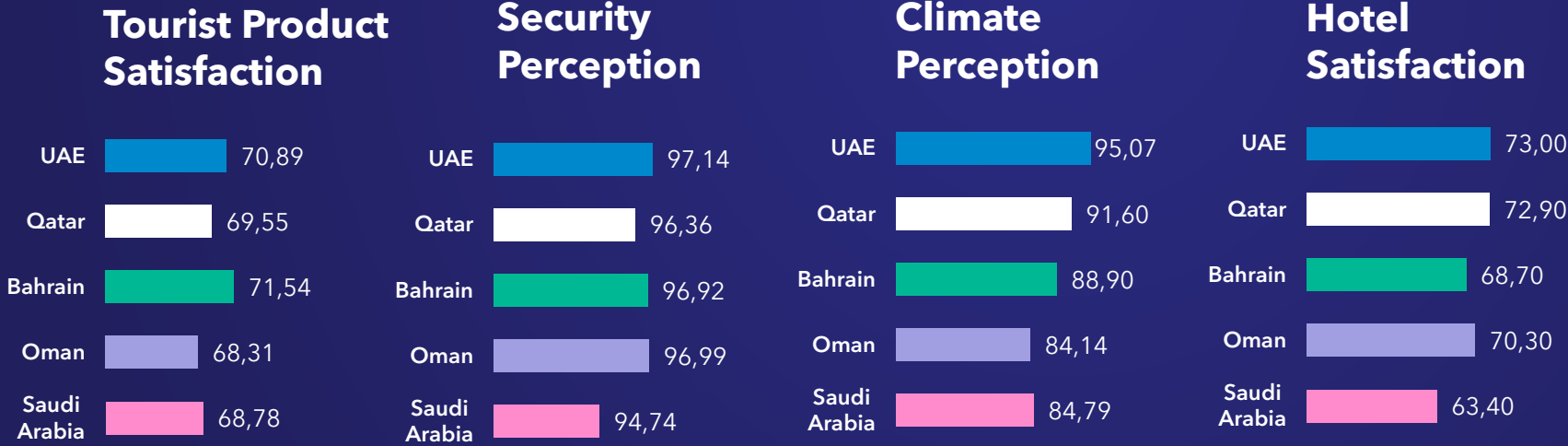
Security is a true added value for the region, with a better perception than in other major tourist areas in the world; Paris (93), London (92), Rome (90).

Comparison with the 1st quarter 2023 barometer:

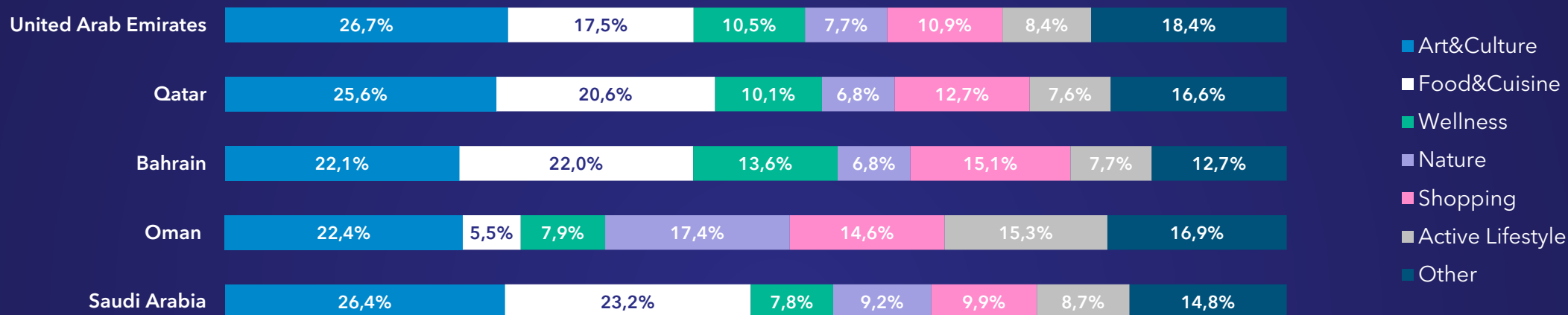
UAE and **Qatar** are experiencing an increase in their satisfaction levels, while the other countries tend to offer a lower level than the previous year. This is mainly due to a more negative perception of the weather, a trend that is considered normal due to the high temperatures in the region during the analysed period.

Decrease in Climate Perception:

Bahrain (-6%), **Saudi Arabia** (-5.5%). It shows the need to always adapt the tourism offerings and infrastructure to mitigate the impact of high temperatures on the traveller's experience.



Tourist interest distribution



We notice that most destinations in the region have similar tourist interests, with **culture and gastronomy** being the most mentioned products on social media in all countries except **Oman**. The studied destinations are not clearly positioned, but this offers an opportunity for each of them to define themselves in the future.

Points to highlight:

Tourist interests are more heterogeneous in **Oman**. The distribution of these interests is particularly interesting as it does not fully correspond to the model of neighbouring countries. **Nature, shopping, and sports** are the most mentioned products.

Through this, we can discern Oman's willingness to differentiate itself from its competitors and position itself as a destination more focused on the discovery of nature or sports.

Mentions about nature and sports are especially driven by the **Indian market** (20.5% of mentions about nature, 19.5% of mentions about sports), showing the growing importance of this origin market.

Top natural attractions on social media (Oman): Jebel Shams, Wadi Ash Shab, Jebel Akhdar.

Destination performance by key air connectivity indicators

Country	Connected Countries	Top 3 Airlines	Evolution of seats April-Aug 23 vs 2022 %	Evolution of seats Oct-Dec 23 vs 2022 %
Saudi Arabia	69	Saudi Airlines Flynas Flyadeal	+15	+11
United Arab Emirates	99	Emirates flydubai Etihad	+25.4	+17.4
Qatar	80	Qatar Airways Indigo Finnair	+16.6	+19.3
Oman	40	Oman Air SalamAir flydubai	+30	+22.6
Barhain	28	Gulf Air Emirates flydubai	+19.6	+14

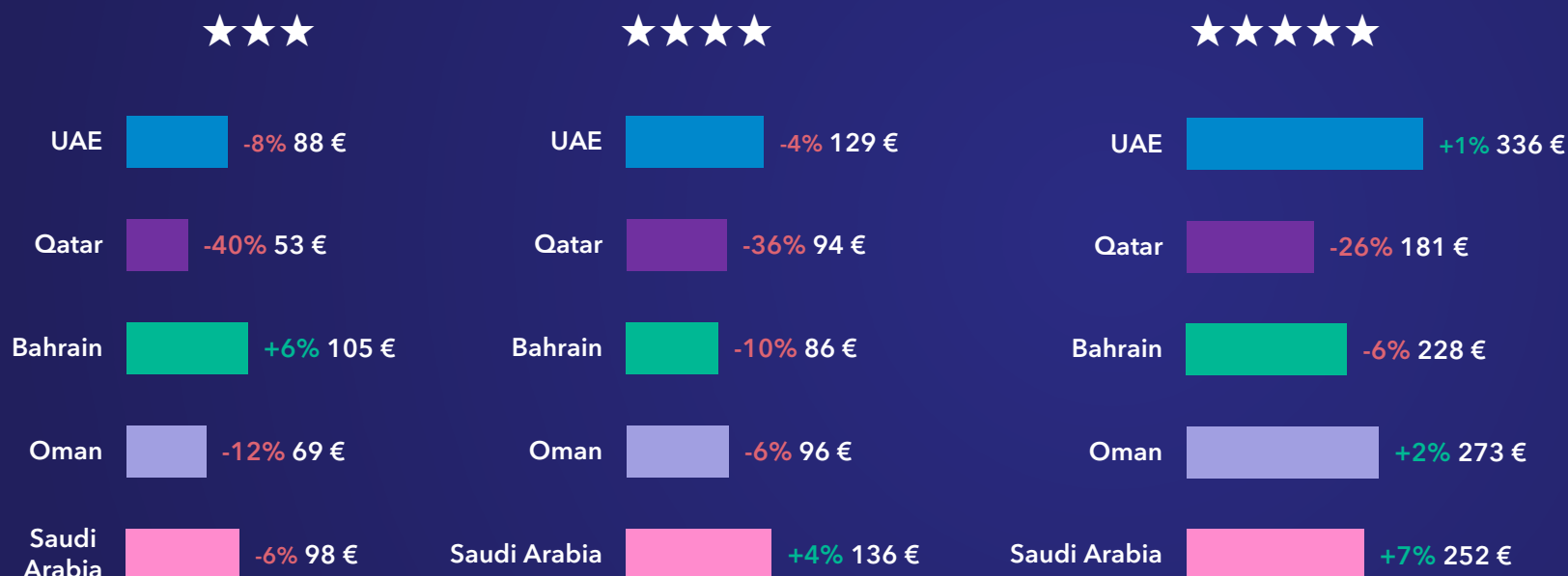
The **UAE** is positioned at a very similar connectivity level to major European hubs. In fact, during the period studied, 99 countries were connected to the Emirates.

France: 112 countries
 United Kingdom: 106 countries
 Germany: 98 countries

It's worth mentioning the significant growth in air activity in recent months compared to 2022. **UAE** and **Oman** have seen an improvement in their connectivity of over 20%. This situation is primarily explained by the reopening of tourism markets in Asia. This growth is even more encouraging when considering the projections for the end of the year. In fact, air connectivity is expected to continue increasing by more than 10% in all markets compared to 2022, a year in which the organization of the World Cup in Qatar had already benefited a post-pandemic recovery in the aviation sector in the region.

Finally, it should be noted that the overall growth in air connectivity in the coming months is sustained by both traditional and low-cost Airlines. However, in **Saudi Arabia** we witness a significant increase in the air capacity of low-cost companies (23% compared to 2022).

Forecast Hotel Prices vs 2022



Globally, **Qatar** is positioned as the destination with the most attractive hotel prices. We observe a significant decrease in published rates compared to the 2022 period (hosting of the FIFA World Cup).

It is also interesting to note that among all the markets analysed, Qatar has a lower average price for 5-star hotels. This is because 40% of its hotel properties are 5-star, increasing competition among hotels in this category, while this proportion does not exceed 30% in other markets.

In line with the pricing trends observed in Qatar, we notice a decrease in public prices in most destinations, with a notable exception in **Saudi Arabia**, which experiences an increase in hotel rates in the 4 and 5-star categories. It will be interesting to closely monitor this destination. With the development of new sub destinations in the Red Sea and the entry of international hotel chains, we will see if the pricing dynamics will continue to rise or if the increase in available rooms will push prices down.

Sources and definitions

Indices definitions

GTPi (Global Tourist Perception Index): *This index measures the overall level of visitor satisfaction with the destination. This combines the Hotel, Product, Security and Climate indices and analyses the distribution of general sentiment about the destination.*

TPI (Tourist Product Satisfaction Index): *This index, based on tourist mentions on social media, measures the level of satisfaction with the following products on offer at destination: Arts & Culture, Food & Cuisine, Family Activities, Active Lifestyle, Nightlife, Sunbathing, Wellness, Shopping and Nature. This index is obtained by analysing the distribution of positive, negative and neutral comments that are made in relation to each of these products on social media through Natural Language Processing techniques.*

PSI (Perception of Security Index): *This index measures the level of security perceived by visitors, based on tourist mentions on social media. This index is calculated using advanced Natural Language Techniques that allow to understand when a comment on social media refers to these issues as well as the sentiment of the mention.*

PCI (Climate Perception Index): *This index, based on tourist mentions on social media, measures the level of visitors' satisfaction with the climate at the destination using Natural Language Processing techniques. This is achieved by measuring the volume of "complaints" on social media, that is, negative comments regarding the meteorology at destination and setting an inverse relationship: the lower the volume of negative comments, the higher the satisfaction index. This allows us to understand the relationship between the expectations of the visitors and the reality of the destination.*

HSI (Hotel Satisfaction Index): *This index, based on reviews on hotel portals, measures the level of tourist satisfaction with hotels at destination for 3-, 4- and 5-star hotels, based on comments made on TripAdvisor, Booking and Expedia. It is calculated using Natural Language Techniques to understand the sentiment of mentions.*

Indices scale

The indices show values between 0 and 100 points. Below is the rating scale to know the meaning and evolution of the indicators over time.

From 0 to 24 points: *The indices in this scale, show very low levels of satisfaction and confidence and are therefore a priority area for revision.*

From 25 to 49 points: *Relatively low level of satisfaction and confidence. Significant potential for improvement.*

From 50 to 74 points: *Good to very good satisfaction level. Moderate potential for improvement*

75 to 100 points: *Excellent levels of satisfaction and confidence. In some cases, there is room for improvement, although in most of them these are levels to maintain and consolidate.*

Sources



Air Connectivity Source: *Cirium. It includes direct scheduled flights*

Hotel Price Source: *OTAs and direct sale.*

Flight Price Source: *Flight prices published on OTAs*

Social Media Sources: *Instagram, Twitter and TripAdvisor*

Flight Searches: *Travelport.*

Hotel Review Sources: *Expedia.com, Booking.com, TripAdvisor*

Flight Booking: *MIDT data: Travelport, Sabre, Amadeus. Excludes direct bookings with airlines*



Providing **Travel Intelligence** in more than 40 countries

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