



MABRIAN

In collaboration with Katalysts & ∞

Tourism Barometer

Middle East

1st Semester 2023

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*

Flight Price Source: *Flight prices published on OTAs*

Flight Searches: *Travelport. Excludes direct searches with airlines*

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

Hotel Price Source: *TripAdvisor*

Social Media Sources: *Twitter and TripAdvisor*

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

Spend: *Mastercard international spend at destination (credit and debit cards)*

Global Tourist Perception Indexes for international visitors

Global Satisfaction



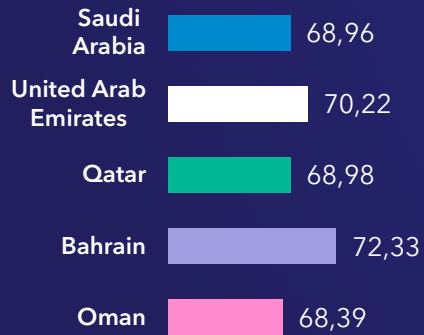
Oman and the **UAE** score the highest **global perception** indexes in the region, along with the highest levels of satisfaction with **hotel services**.

In terms of satisfaction levels with **products**, **Bahrain** and **UAE** showcase on the top of the scale. Nonetheless, the index is relatively comparable for the remaining countries, signifying a similar degree of competitiveness.

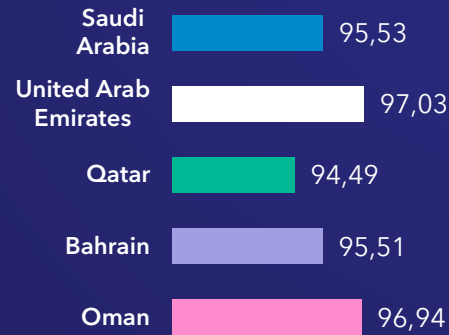
The **security perception** scores are exceptional as evident, even in a global scale, with all countries scoring above 90%. This is worth noting, as it is a crucial element in promoting and boosting tourism and business in the region.

Climate perception overall ranks high for all countries.

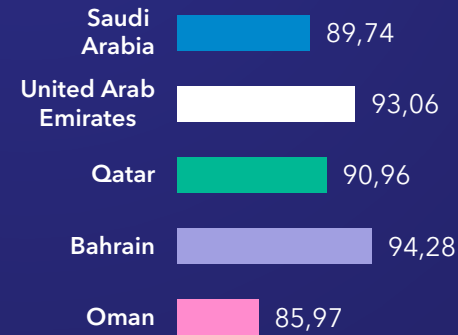
Tourist Product Satisfaction



Security Perception



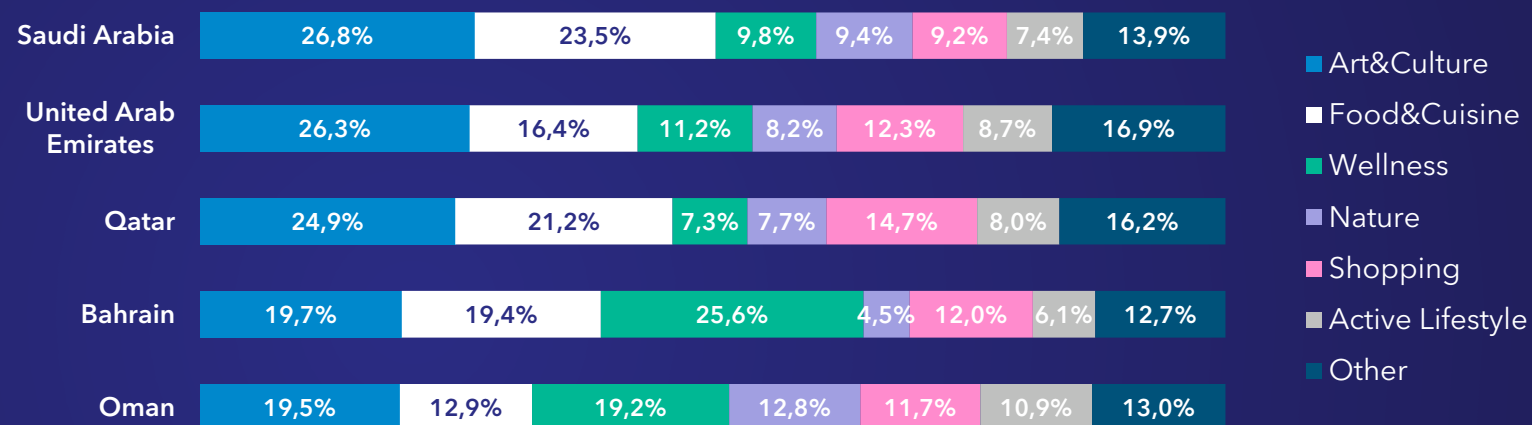
Climate Perception



Tourism Barometer - Middle East

The top-ranking product category frequently mentioned on social media platforms such as Instagram and Twitter in **Saudi Arabia** and the **UAE** is **Art & Culture**. This is due to the presence of historical sites in KSA such as Al Ula, and Dubai's cultural programs. However, it's worth noting that art and culture also play a crucial role in the tourism industry across all countries. For instance, **Qatar** has made great investments in products such as museum offerings.

Tourist interests distribution



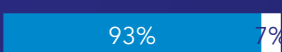




Food and cuisine is the second most mentioned products in **Saudi Arabia**, closely followed by **Qatar**.

It is worth noting that the top-ranking country for **wellness** product mentions in the region is **Bahrain**, with mentions mostly coming from KSA.

Oman presents a more diverse range of tourist products interest, catering to a more heterogeneous set of interests such as **wellness, nature, and active lifestyle**.

Destination performance by key air connectivity indicators

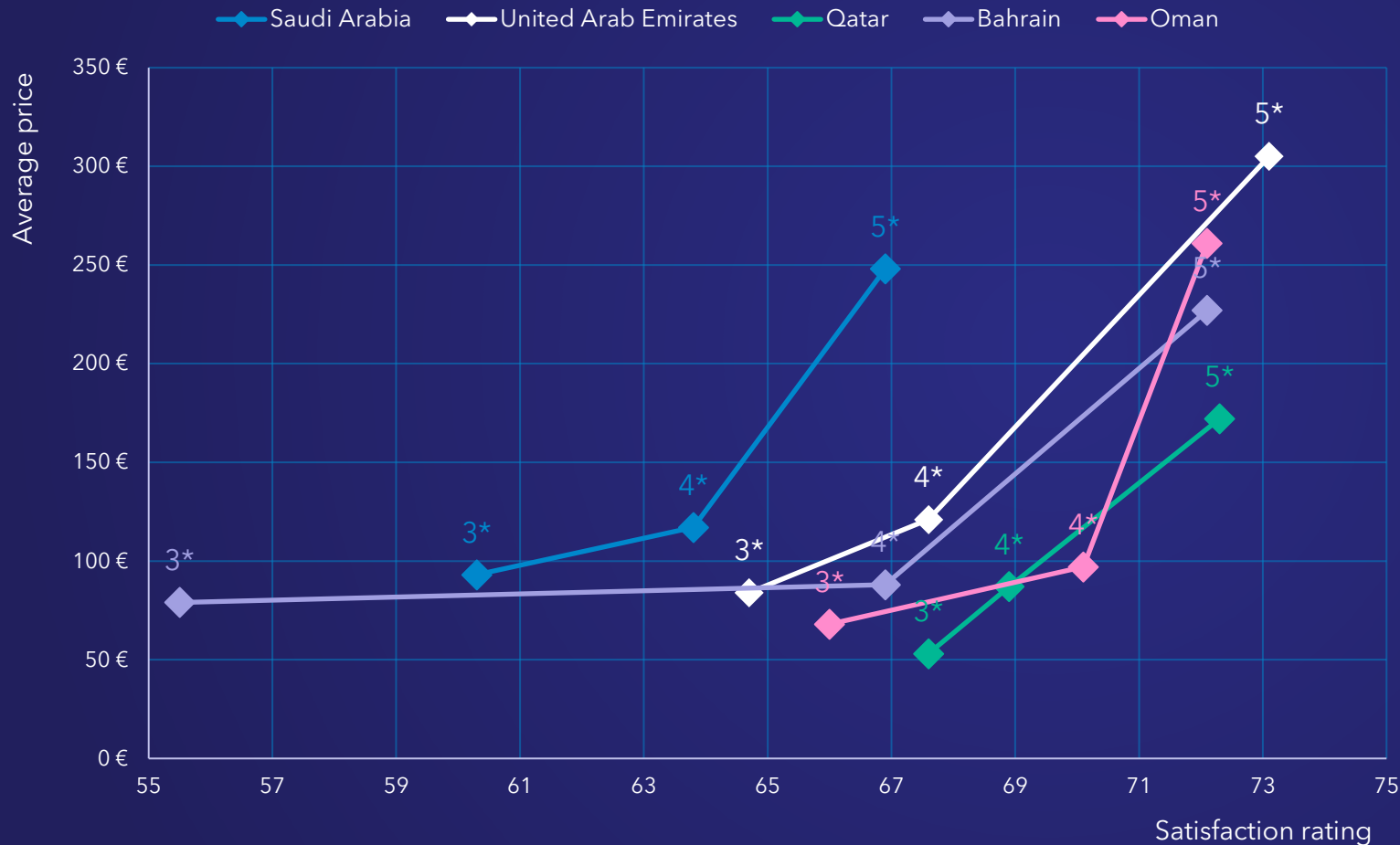
Country	Connected Countries	Top 3 Airlines	Evolution of seats % vs 2022	Legacy/Low cost
Saudi Arabia	59	Saudi Airlines Flynas Flyadeal	+15.7	
United Arab Emirates	100	Emirates flydubai Etihad	+1	
Qatar	78	Qatar Airways Indigo Finnair	-1.3	
Bahrain	25	Gulf Air flydubai Emirates	no change	
Oman	37	Oman Air SalamAir flydubai	+23.3	

■ Legacy ■ Low cost

Oman and **Saudi Arabia** have experienced remarkable progress in increasing the number of **inbound seats**, with **Oman** showing a growth of 23.3% and **Saudi Arabia** 15.7% vs 2022. Although **Saudi Arabia's** connectivity is still trailing behind Dubai, the country is making significant strides in increasing its connectivity.

The figures might change rapidly in the upcoming months, as **Saudi Arabia**, in its efforts to attract 100 million tourists, includes enhancing its infrastructure, developing new tourist destinations, and increasing the capacity of its airlines. In the same vein, the government has announced the launch of a new airline, **Riyadh Aid**, in March, and the STA and Ministry of Tourism have invested in initiatives aimed at encouraging airlines to expand their capacity within the country.

Hotel Satisfaction Index Vs. Hotel Prices



Qatar ranks higher than other countries in terms of **satisfaction with 3-star hotels**, closely followed by **Oman**. Additionally, the average price for these two countries is more competitive in the region.

The level of **satisfaction with 4-star** hotels is similar among the countries, with **Oman** showing a slightly higher level of satisfaction in this category. When it comes to hotel prices, the **UAE** showcases the **highest average price**.

Despite having the **highest average price for 5-star** hotel category, the **UAE** also boasts the highest level of satisfaction in the region.

Qatar, Bahrain, and **Oman** present similar **satisfaction level** with the **UAE**.

In general, the average prices for 4 and 5-star properties in the region are more appealing compared to the main European destinations.

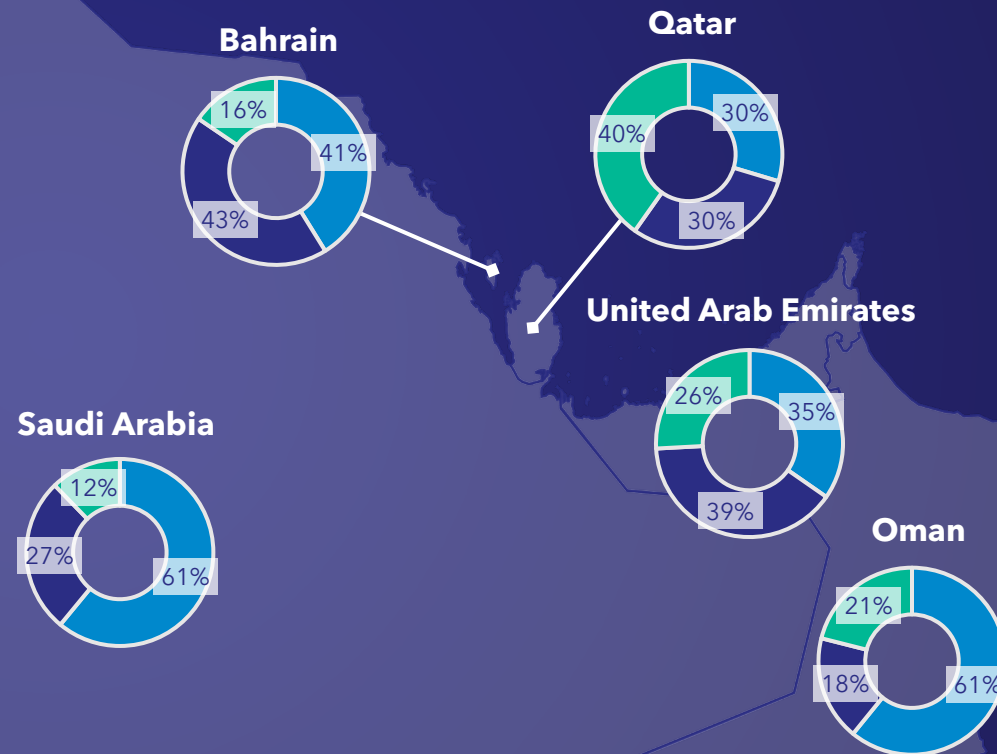
Hotel Composition distribution

UAE has a **well-balanced** distribution of hotels across 3, 4, and 5-star categories, while **Saudi Arabia** is still **expanding** its 5-star hotel offerings.

Qatar's hotel service composition is also pretty **well-balanced**, and It has the highest percentage of 5-star hotels in the region in this composition.

Bahrain's hotel offerings are primarily focused on **3 and 4-star hotels**, with a similar distribution between these two categories.

Oman's hotel composition is most **robust in the 3-star** hotel category, which is pretty similar to **Saudi Arabia**.





Let's talk!

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