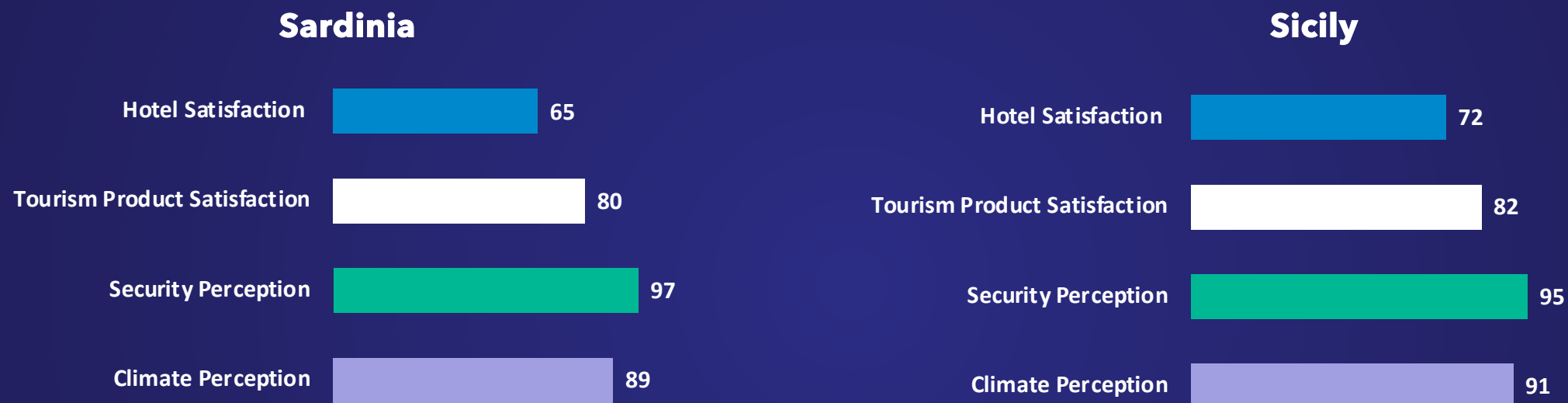




Destination Benchmarking Sicily- Sardinia

Summer 2023

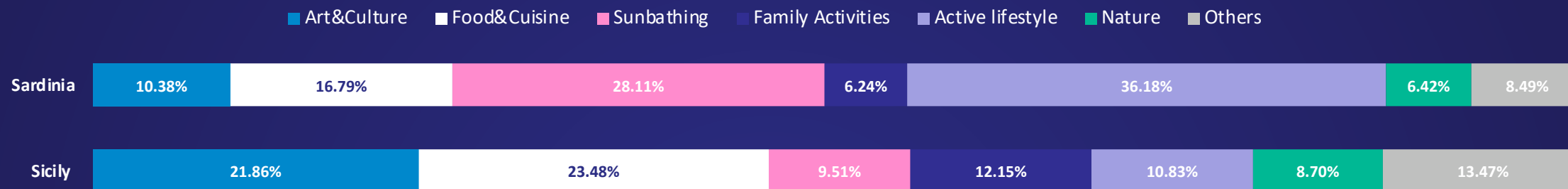
Global Tourist Perception Indexes for international visitors



The travellers have shown a high satisfaction level during the summer of **2022** in all aspects. International visitors perceive both islands as safe. Despite experiencing heatwaves last summer, the level of satisfaction with the weather is remarkably high in both **Sicily** and **Sardinia**. Regarding the hotel offerings, **Sicily** receives a slightly higher score, possibly due to the significantly higher accommodation costs in **Sardinia** during the peak season.

Destination Benchmarking Sardinia vs Sicily

Tourist interests distribution



Top 5 origins

Sardinia	Sicily
UK	USA
Spain	Spain
USA	UK
France	Francia
Germany	Australia

The main reasons to visit **Sicily** include activities related to art, culture, gastronomy, and family-friendly experiences. Meanwhile, in **Sardinia**, visitors primarily seek to enjoy the sea, beaches, active tourism, and local cuisine.

Both islands attract visitors from the same source markets, although it's important to highlight that **Sicily** is more popular among **American tourists**, while **Sardinia** attracts more **British tourists**. Additionally, **Australian tourists** show great interest in **Sicily**, ranking fifth among the top five international source markets, while **Germans** hold that position for **Sardinia**.

Performance of destinations based on air connectivity

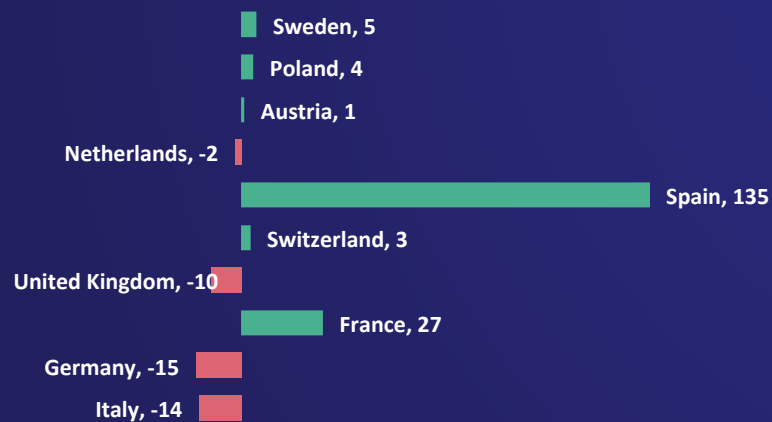
Destinations	N° of seats	Seat evolution % vs. 2022			International vs Domestic	
		Total	International	Domestic	International	Domestic
Sardinia	1.31M	-5,8%	+5,6%	-13,6%	0.45%	0.55%
Sicily	4.3 M	-1%	+7-5%	-5,6%	0.38%	0.62%

■ International ■ Domestic

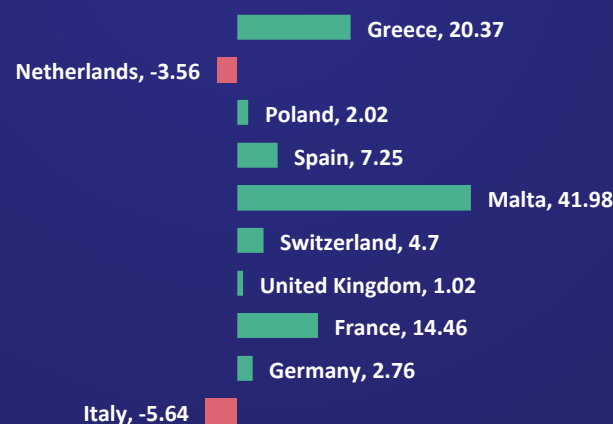
Air connectivity is of great importance for tourism, especially for island destinations. This summer, the total air capacity is slightly lower than in 2022, with a **1%** and **5.8%** decrease for **Sicily** and **Sardinia**, respectively. However, an increase in the number of international visitors is expected for the summer of **2023**, as international air capacity has increased while domestic air capacity has decreased. Sardinia stands out with a **135%** growth in connectivity with Spain, and France also shows improved connectivity with the island, with **27%** more available seats.

On the other hand, in **Sicily**, growth is observed in the top 10 source markets, except for Italy and the **Netherlands**.

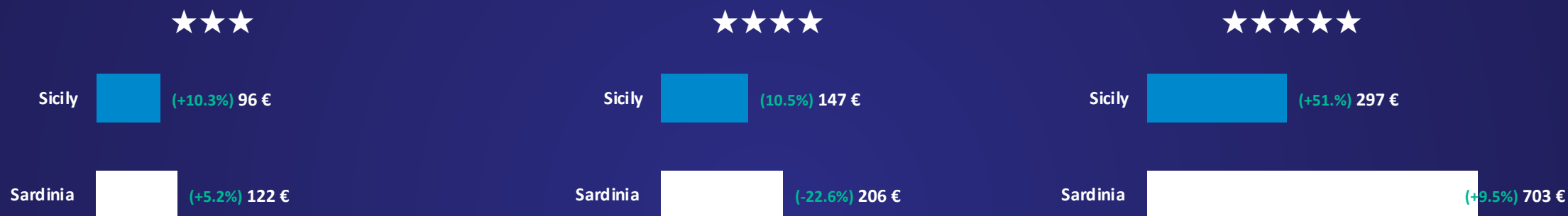
Sardinia



Sicily



Hotel Price Benchmarking



The accommodation costs for the summer of 2023 have increased in the 3, 4, and 5-star categories on both islands. However, hotel prices in **Sardinia** are significantly higher than in Sicily. On average, the prices for 3 and 4-star accommodations in **Sicily** are **27%** and **40%** lower than in Sardinia, respectively. The 5-star category is particularly noteworthy, with an average price of **€703** per night/room, which is **140%** more expensive than in Sicily.

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)*



Let's talk!

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