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# 1. Introduction

The last two decades brought a transformative change for UAE, from predominantly oil-based focused to a diversified economy fueling its position as one of the world's leading tourism, business, IT, and trade destinations.

UAE's leisure and entertainment sector have been on a meteoric rise, thanks to a synchronized, country-wide delivery model bringing together regulatory access, immigration policy, and physical infrastructure.

Due to the government's heavy investment, the tourism sector is projected to grow at a CAGR of around 9.73% during the forecast period of 2023-28 while L&E is forecasted at 8.9% for the same period. This means investment in the industry development overall, new products, jobs creation, companies, skills, experience, and talent will continue to rise.

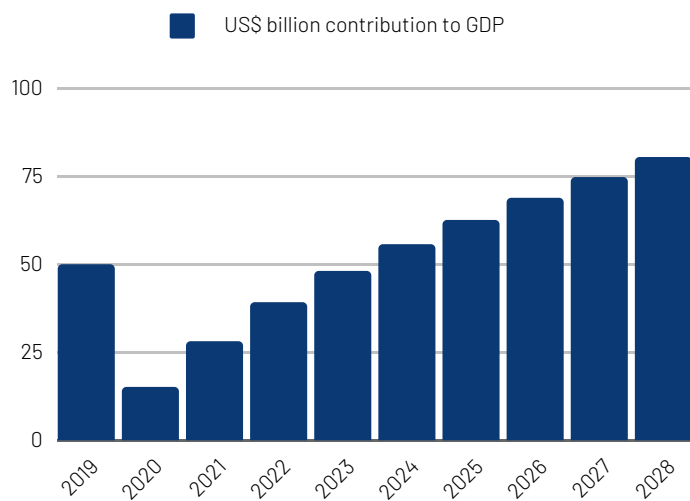


Figure 1 - Source: Tourism Economics, WTTC

## 1.1 Why is this report important?

Every business strives to improve its customer experience. Customers leverage various sources to support their buying decisions, including social networks, blogs, and online feedback forums. Customer experience is now everyone's responsibility and customer touchpoints continue to multiply. This report looks to provide a snapshot of the L&E market in the UAE.

Some of the KEY QUESTIONS that will be answered in this report include:

1. What is most important to customers visiting L&E business in UAE?
2. How is the L&E industry performing in 2022 across CX indicators?
3. Who are the leaders in the industry seen through customers' eyes?
4. What does the sentiment demographics landscape look like in L&E?
5. What are the next steps for the L&E industry?

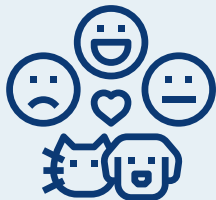




## 1.2 Summary of Key Performance Indicators

Key performance indicators (KPIs) are a vital navigation instrument used by managers to understand whether their business is on a successful voyage or it is veering off the prosperous path. For many years managers struggle to understand and identify crucial management metrics for CX.

Many rely heavily on CSAT, or NPS, which are rating-based measures that do not tell the 'why of things' and could be culturally perceived too. In this report, we focus on an understanding mix of traditional (NPS, CSAT) and modern indicators (Sentiment, Relevance/Importance).



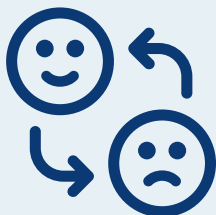
### Net Promoter Score (NPS)

NPS is a widely used market research metric that is asking respondents to rate the likelihood that they would recommend a company, product, or service.



### Customer Satisfaction (CSAT)

CSAT is a term frequently used in marketing. It is a measure of how products and services supplied by a company meet or surpass customer expectation.



### Sentiment Score (HCS)

Sentiment score help understands people's emotions which are essential for businesses since customers can express their thoughts more openly than ever before.



### Relevance Score (HIS)

Indicates the importance or relevance of this particular attribute or topic to the analysis. This score can assist in understanding what aspects are most important for customers on attribute and topic levels.

### 1.3 Feedback Demographics

Although there are many different things that companies are doing to deliver an outstanding customer experience, it's often unclear for brands and organizations if they are going in the right direction with the right amount of focus on the right initiatives. Data in this report has been collected from 12 theme parks and waterparks in UAE with the below feedback demographics.

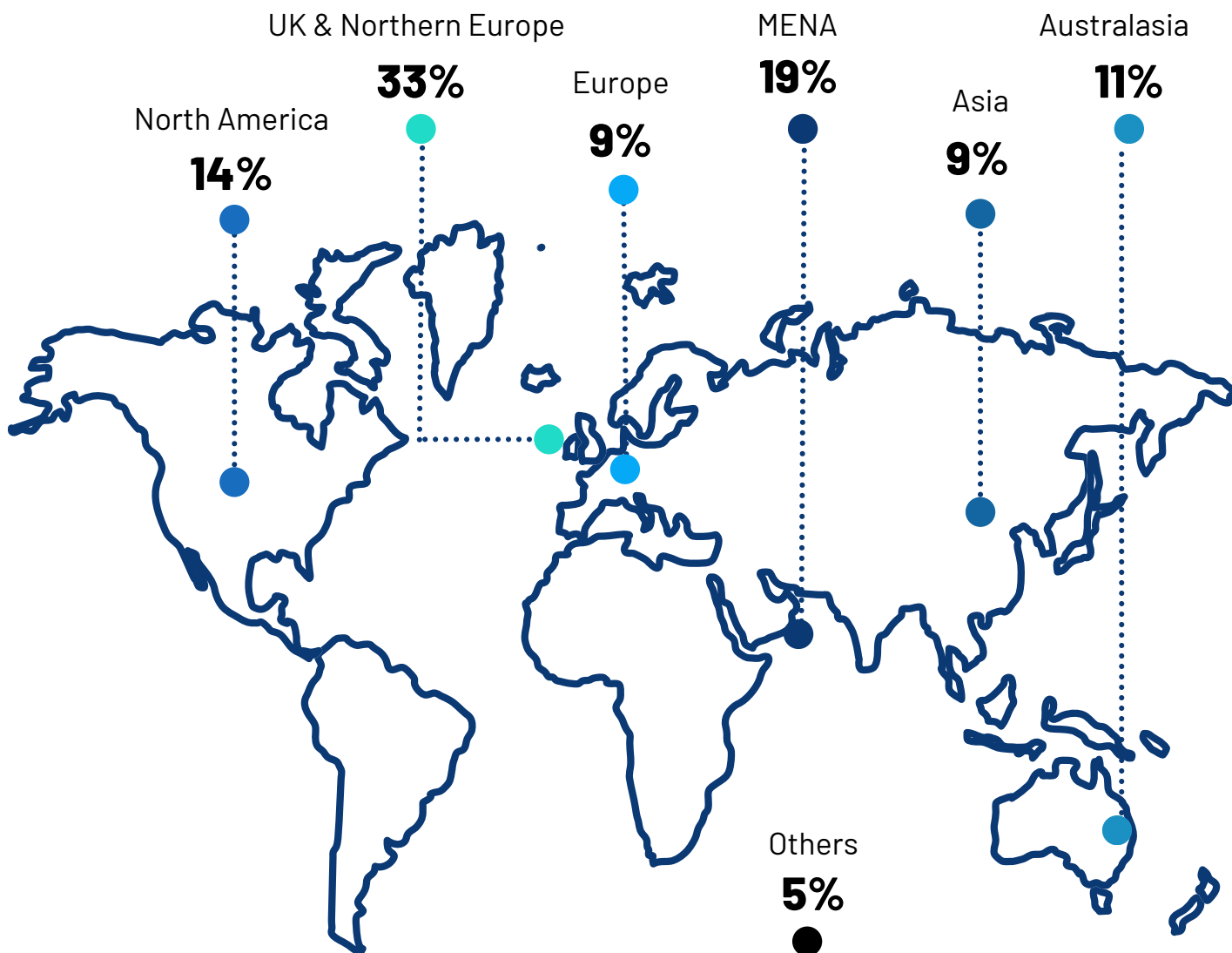


Figure 2 - Feedback Demographics Distribution

**" If you don't listen to your customers, someone else will. " - Sam Walton**

## 1.4 How to use this report for business impact?

Understand the baseline today of the L&E market in the UAE. If you are setting strategies on new investments, what rides to buy, what burger tantalizes customers, and what success looks like. The full version of this report can help set those goals and establish yourself as an industry leader.

If your company name is in this report, you are one of the industry leaders!



### **Ferrari World, Abu Dhabi**

Location: Yas Island, Abu Dhabi

Opened: November, 2010

Area: 86,000 square meter

Theme: Ferrari-inspired theme park

## 1.5 Message from our Leaders

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**"L&E has had such a profound impact on my life and I am constantly amazed by the hard work, dedication, and innovation that goes into it."**

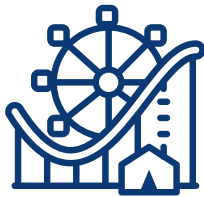


**Vladan Pantelic**  
Co-Founder & CEO, Hoick

## 2. Measuring Performance

According to Themed Entertainment Association (TEA) and World Waterpark Association (WWA), the global theme and waterpark industry saw strong performance in 2021, with many parks reporting record numbers.

### Theme Parks



- **Attendance:** The global theme park industry welcomed an estimated 524 million visitors in 2021, up from 471 million in 2020.
- **Revenue:** The global theme park industry generated an estimated \$40.4 billion in revenue in 2021, up from \$37.8 billion in 2020.

- **Attendance:** The global water park industry welcomed an estimated 99 million visitors in 2021, up from 94 million in 2020.
- **Revenue:** The global water park industry generated an estimated \$4.3 billion in revenue in 2021, up from \$4.1 billion in 2020.

### Waterparks



### How do we measure performance?

Topic performance is assessed from the consolidation of a large number of attributes. For example, the topic FOOD would have attributes such as burger, pizza, sandwich, lunch, ice cream, fruit, etc. for a more holistic overview.

As described in the summary of KPIs section of this report we measured four different indicators. Let's see scales and how they are measured:

- NPS = Promoters (4,5) % - Detractors (1,2) %
- CSAT = From 1 (Extremely Dissatisfied) to 5 (Extremely Satisfied)
- Sentiment = From -5 (Very Negative) to 5 (Very Positive)
- Importance = From 0 (Not at all important) to 5 (Very Important)



## 2.1 Market Snapshot

Further in this report, we will provide a snapshot of KPIs for the L&E market in UAE along with topics that were created from analysis of various attributes.

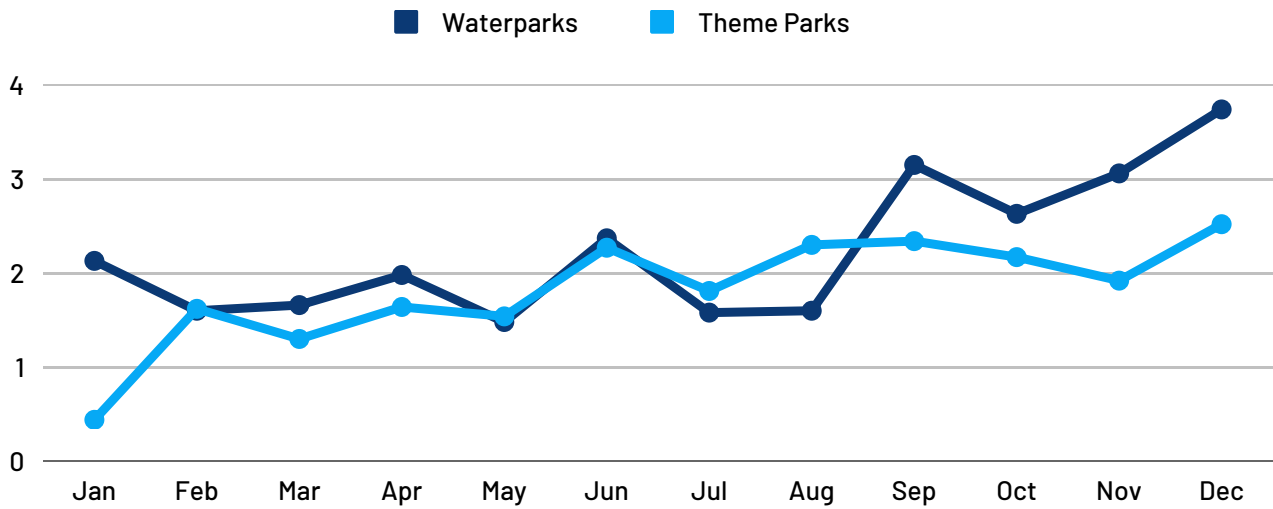


Figure 3 - Waterparks vs Theme Parks Sentiment Performance, 2022

L&E across UAE saw a cumulative increase of 28% in consumer sentiment overall. While waterparks (39% increase) outperformed Theme Parks (14% increase) it is fantastic news that the entire L&E industry incrementally achieved better Sentiment, NPS, and CSAT results than 2021 overall.

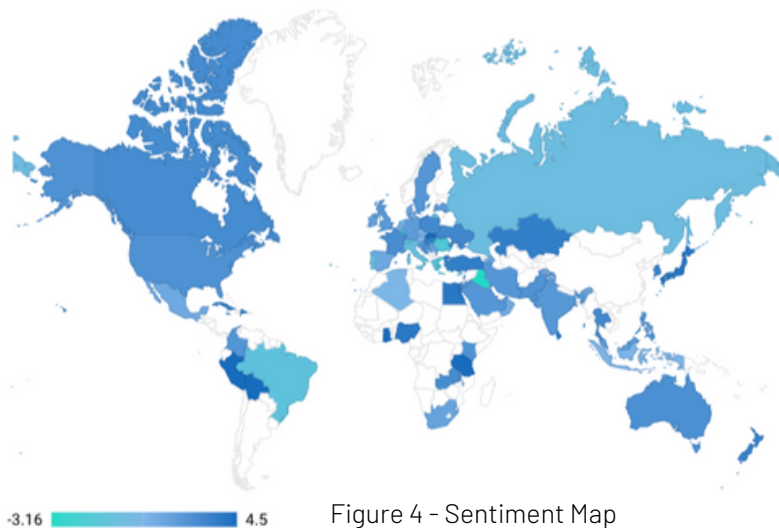


Figure 4 - Sentiment Map

# 82

is the number of different nationalities that wrote feedback across L&E venues.

**NPS**  
**68.48%**  
 ↑ 29.2% YoY

**CSAT**  
**4.26**  
 ↑ 7.50% YoY

**Sentiment**  
**2.11**  
 ↑ 28.6% YoY



As noted, below shows the top 10 ranking L&E business in UAE with variation gaps between what customers rate and how they feel being noticeable.


Ranking	Sentiment	Customer Satisfaction
1	Company 1	Company 5
2	 Ferrari World, Abu Dhabi	Company 1
3	Company 5	Company 2
4	Company 2	 Ferrari World, Abu Dhabi
5	Company 9	Company 9
6	Company 4	Company 4
7	Company 10	Company 7
8	Company 7	Company 10
9	Company 3	Company 3
10	Company 8	Company 8

Table 1 - Top 10 Ranking by Sentiment and CSAT from the UAE L&E Market

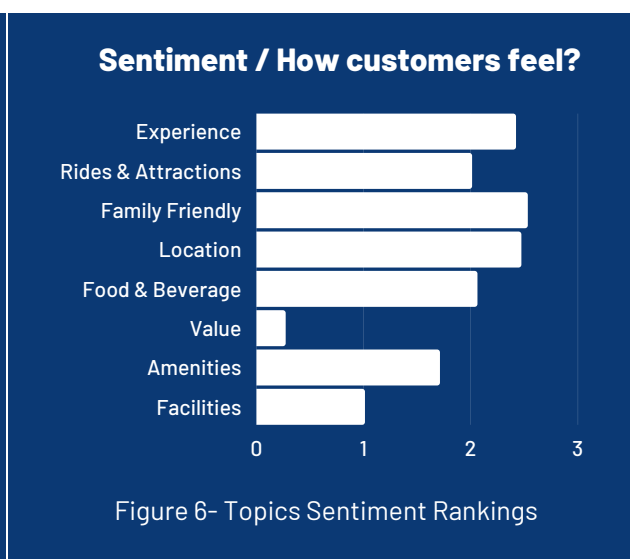
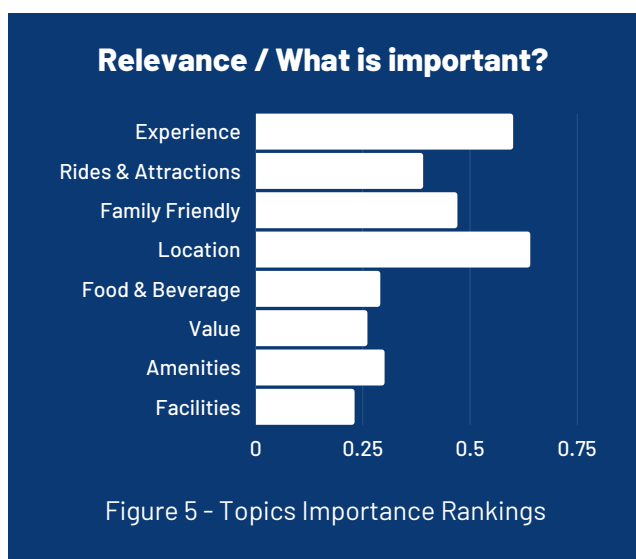


Figure 7 - CX Quadrant of top 10 Leisure & Entertainment companies in UAE by sentiment and satisfaction

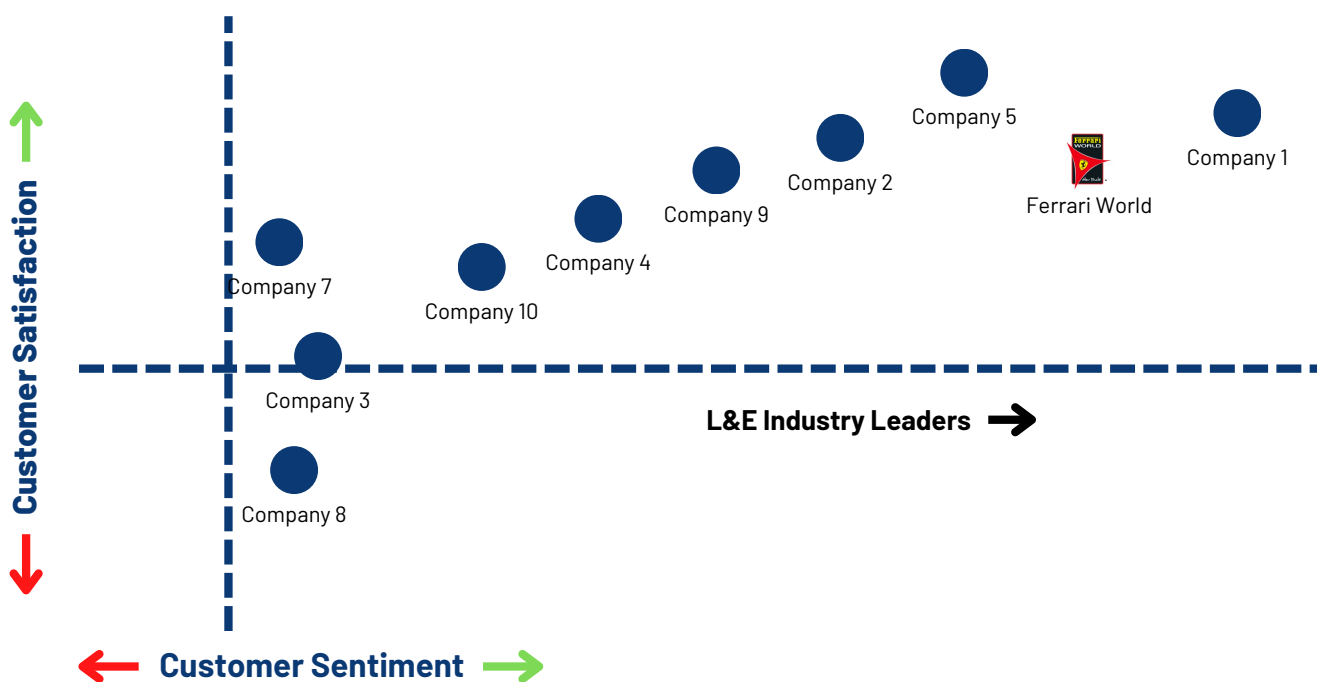


Figure. 7 illustrates the CX quadrant featuring the top ten companies varying in CSAT and sentiment, each with different key focus areas across.

## 2.2 Rides & Attractions

Rides and attractions are the main draw for guests at theme parks and waterparks. They provide excitement, thrills, and entertainment for guests of all ages. Rides and attractions also help to create a sense of adventure and fantasy, which is an important part of the overall theme park experience.

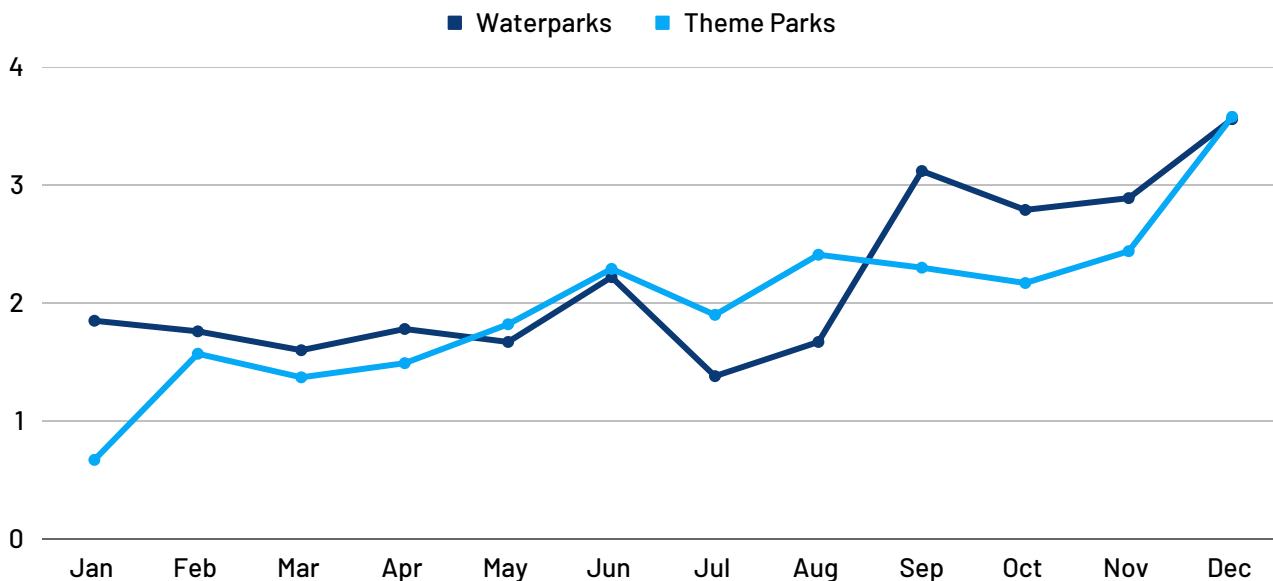


Figure 8 - Rides & Attractions: Waterpark vs Theme Park Sentiment Performance

## Sentiment Crunch: Rides and Attractions

- Regionally R&A is the most important factor for customers from the EU
- Western Europe (28%) and UK (1.8%) sentiment is down YoY
- R&A is the fourth (4th) most important topic to consumers overall
- Abu Dhabi L&E properties beat other Emirates on R&A sentiment

## 2.3 Location

Location, location, location. A prime location can help to attract visitors and increase accessibility, while a less desirable location can make it more difficult for guests to reach the park and may limit the overall number of visitors. The location of a theme park or waterpark can have a significant impact on its success and accessibility.

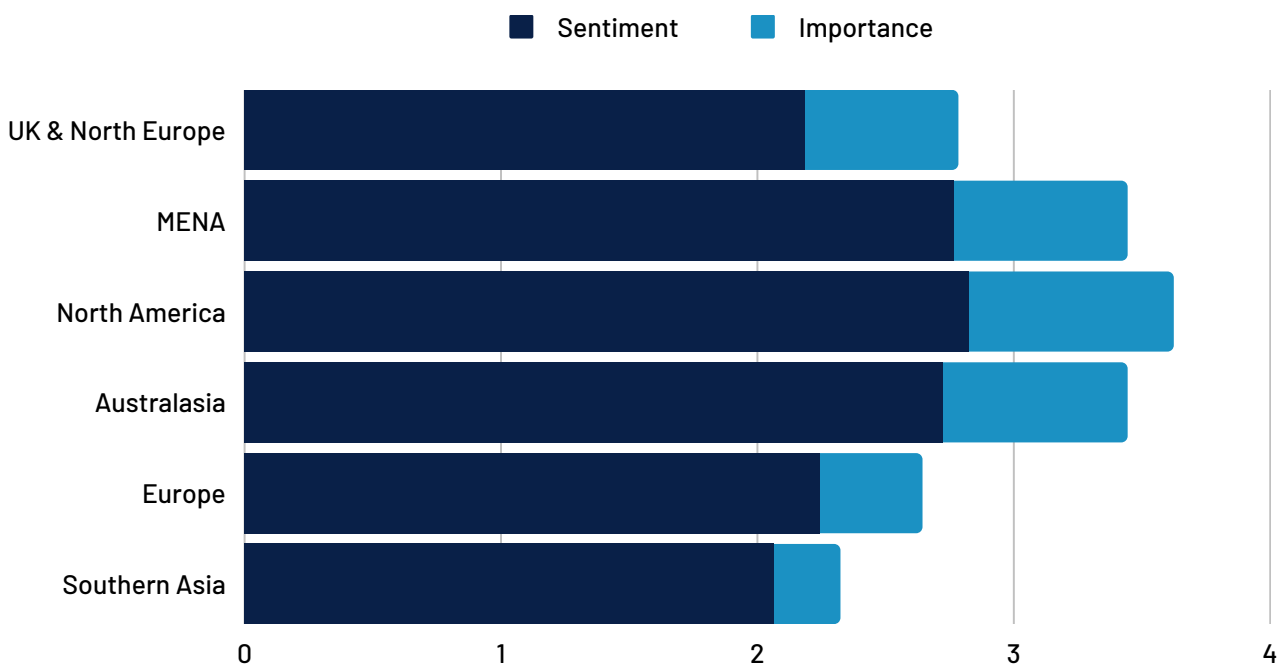


Figure 9 - Cumulative Performance of Location Importance and Sentiment by Region

## Sentiment Crunch: Location

- Location is by far most important to customers overall
- Europe and SEA customers pretty much do not care about location
- Residents prefer location and value venues over thrill and experience
- The importance of location dropped for Abu Dhabi (6.4%) and Dubai (4.6%)

## 2.4 Value for Money

Value for money is an important consideration for guests when visiting a theme park or waterpark. When guests pay for admission, they expect to have a positive experience that is worth the cost.

A theme park or waterpark that offers good value for money will have a variety of rides, attractions, and experiences that are appealing to a wide range of guests, and that can be enjoyed for a reasonable price.

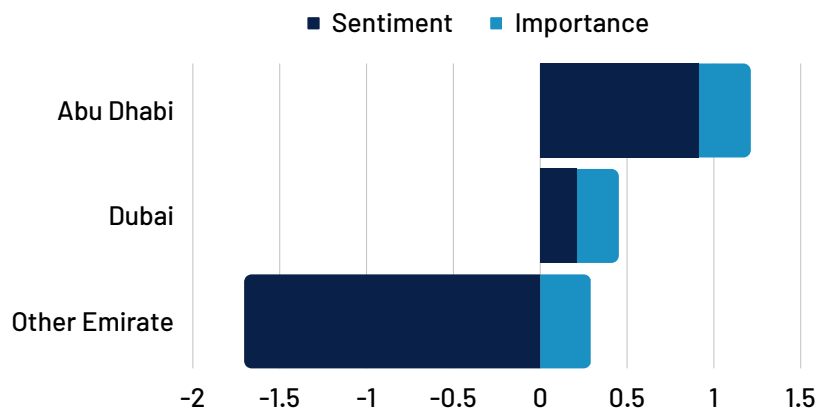
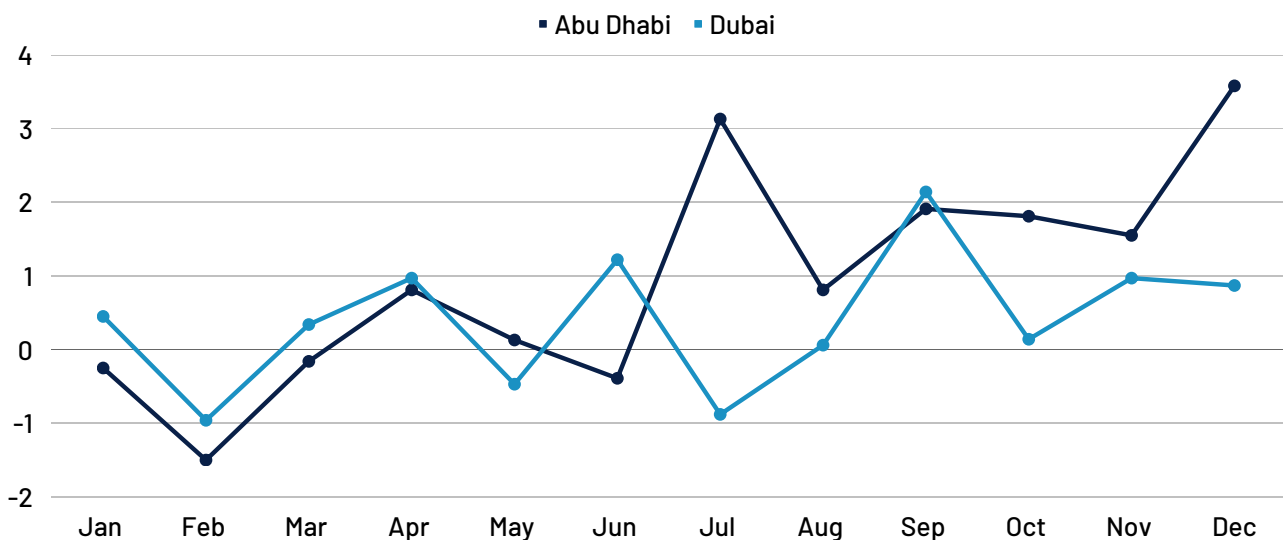


Figure 10 - Value for Money: Performance by Emirate

Venues that offer additional value-added services such as reserved seating for shows, or fast-track access to popular rides, can enhance guest experience and may be perceived as offering good value for money.

Figure 11 - Value for Money: Monthly Dubai vs Abu Dhabi Sentiment Performance



### Sentiment Crunch: Value for Money

- Customers in Other Emirates care about value but are not happy
- Visitors in Abu Dhabi are slightly happier on Value than one in Dubai
- Value for Money improved 42% YoY across L&E venues in UAE
- 60% of customers would be ok with prices for a top-notch experience

## 2.5 Food & Beverage

Food and beverage service is an important aspect of the guest experience. Venues often have long wait times for attractions and rides, and providing options for food and drink can help guests stay comfortable and satisfied while they are waiting. Offering a wide variety of F&B options can attract a diverse range of guests and can be a significant source of revenue.

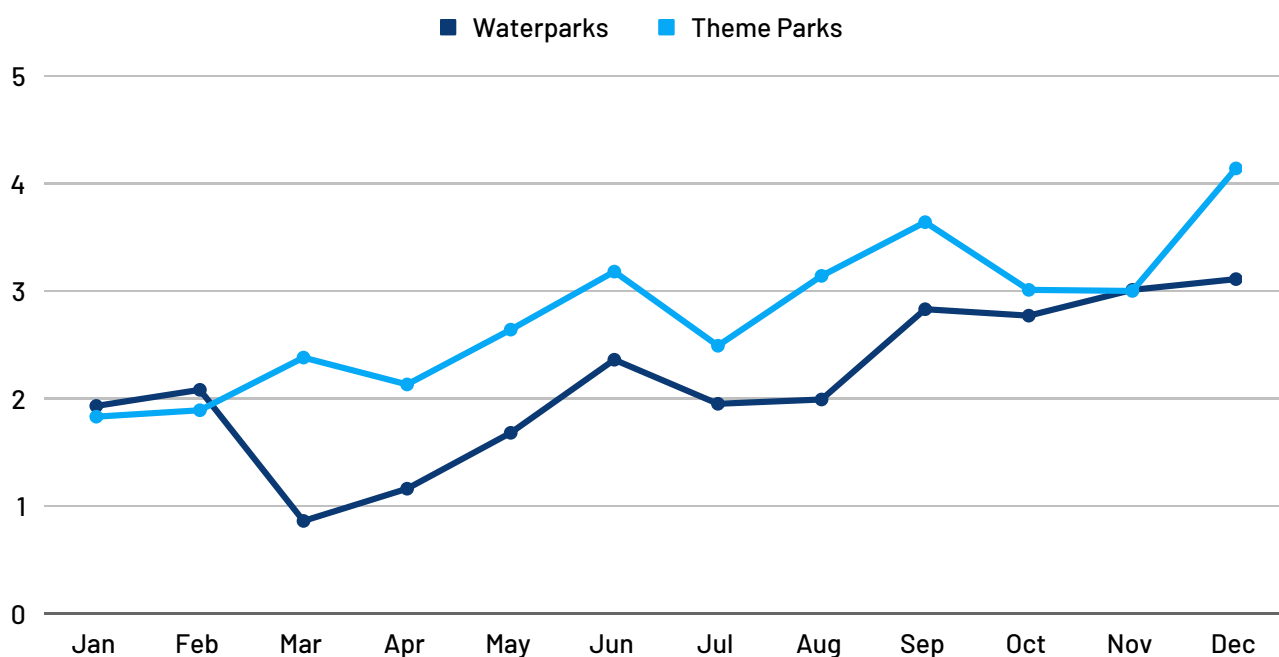


Figure 12 - F&B: Waterpark vs Theme Park Sentiment Performance

### Top 3 regions talking about F&B and YoY sentiment performance.



### Sentiment Crunch: Food & Beverage

- Abu Dhabi properties outperformed all other emirates on F&B
- Dubai F&B properties sentiment grew YoY by 46%
- Residents' sentiment towards F&B increased by 10.3%
- F&B was the most important topic to customers from Australasia



## 2.6 Facilities and Amenities

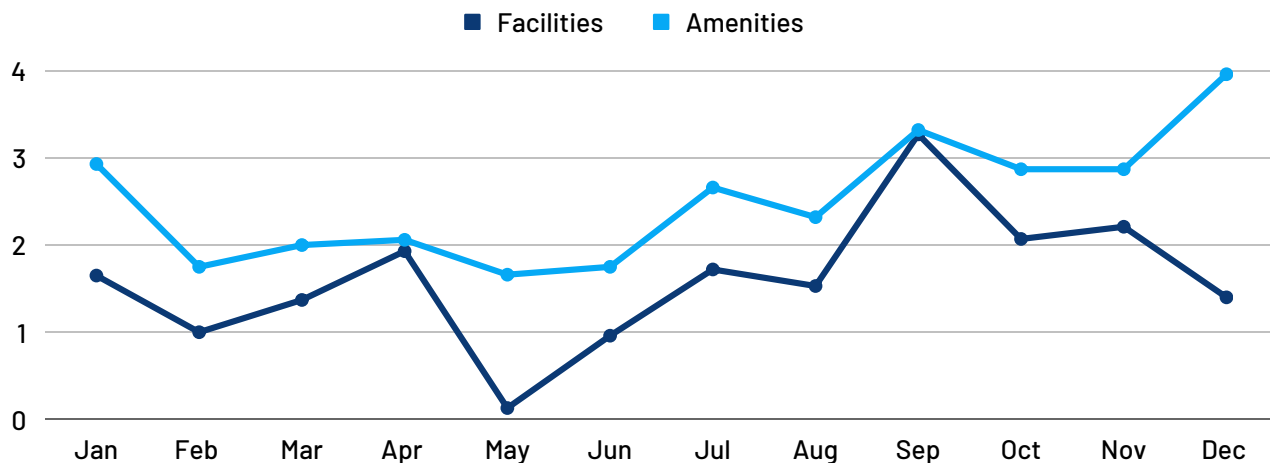


Figure 13- Facilities vs Amenities Sentiment Performance

### Sentiment Crunch: Facilities and Amenities

- Facilities topic sentiment performance dropped YoY by 18% in 2022
- Customers visiting Abu Dhabi venues are happy with the facilities
- Amenities sentiment performance also dropped YoY by 11% in 2022
- Sentiment indicates that Other Emirates provide better Amenities

## 2.7 Experiences and Family Oriented

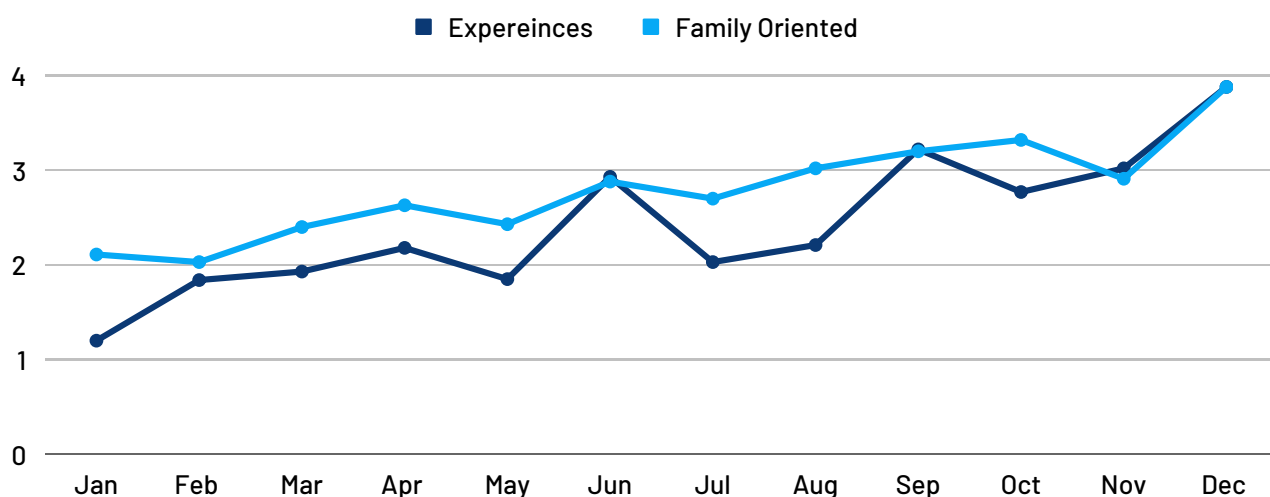


Figure 14- Experiences vs Family Oriented Sentiment Performance

### Sentiment Crunch: Experiences and Family Oriented

- Most venues in the UAE provide a family-friendly environment for all ages
- The sentiment (4%) and Importance (93%) grew YoY for family-oriented
- UK customers talked most about service and experiences across regions
- Experiences and service were most important to MENA customers

### 3. Conclusion

The Leisure and Entertainment industry has seen a surge in positive sentiment in 2022, with many consumers expressing their satisfaction with the wide range of options available to them. From theme parks to theaters, and waterparks, there is something for everyone to enjoy.

The industry has adapted to the challenges posed by the pandemic, offering new and innovative ways for people to have fun while staying safe. With a bright outlook for the future, the L&E industry is sure to continue providing endless entertainment and enjoyment for all visitors.

Overall, the L&E industry in the UAE is diverse, with a mix of traditional and modern offerings that cater to a wide range of interests and preferences. With continued investment and development, the UAE is well-positioned to remain a top destination for tourism and entertainment in the region.

Finally, the below indicates a snapshot of the sentiment performance in 2022 with a larger bubble indicative of higher importance overall to customers.



**Bubble Size** - Indicates importance of topics to consumers.

**Number in the Bubble** - Indicates consumer sentiment.

## 3.1 Next Steps

Where do you go from here? This sentiment report is not just about looking back but also unlocking things that matter in order to improve and help progress ahead, in more informed ways. We continue to monitor market performance in the hope to help the entire industry elevate the game.

1

### Listen and Understand

Listening to and understanding customer preferences to create a friendly, welcoming atmosphere can help improve visitors' satisfaction and overall experience at the venue.

2

### Personalization

Offering personalized experiences and customizing the venue experience based on visitors' preferences can increase their satisfaction and engagement.

3

### Incorporating Technology

Keeping up with the latest technological changes is key to any successful business. The right technology increases flexibility streamlines operations and helps you cope with rapid changes.

4

### New Experiences

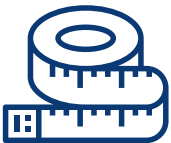
Offering new and unique experiences, such as interactive shows, thrill rides, and themed areas, can keep visitors coming back. Listening to customers is a crucial step to succeed.

## 3.2 Measuring Progress

Every organization, across the globe or those down the street should always behave as a startup. We recommend **Build-Measure-Learn** loop aimed at measuring progress. It's a continuous feedback loop that helps organizations validate their assumptions and improve their products and services.



**Build:** The organization builds a product or service based on its assumptions or historical data about what customers want. It should be the simplest version of the product or service.



**Measure:** In this stage, the organization measures the impact of the changes they have made. They use metrics and data to see how the product is performing and what is working well.



**Learn:** In learn stage, the organization measures customer behavior and collects feedback. This stage is where BML starts to generate insights about what works and what doesn't.

**Loop:** This stage is where the process repeats itself. Based on the insights gained from the Measure stage, the organization either continues to improve the product or pivots and tries a new approach. The goal is to continuously improve the product and CX until it meets the customers' needs.

### The Checklist

One thing is to collect data, but to understand, envision, and articulate data as a business strategy is a whole different game. Let's be honest, if you are not able to tick and answer all of the below, noteworthy areas to improve on.

- How important is burger I make to my GCC customers?
- Is my queue time sentiment performing better than the last week?
- Can I pick up the phone and see how my revenue is doing at 11 AM?
- Do I understand demographics and why, what, when of my customers?
- Do I know what attraction is important to my MENA customers?
- Why my customers choose our business over competitors?

### 3.3 About Us

At Hoick, we empower businesses to listen to customer and employee feedback, understand and analyze what they hear, and take action to improve experiences and design new ones. We help companies capture and act on the customer, market, products, brand, and employee insights, all in one place.

#### Products and Services

- ▶ CustomerMX, Customer Experience Management Software
- ▶ EmployeeMX, Employee Engagement Software
- ▶ Mining Experiences (MX), Market Research Software
- ▶ Borrow our Brain, Professional Service Practice (Data Storytelling)

### 3.4 Prospectus

The full report is custom-made with 50-70 pages and backed up by a database and live market dashboard of the findings with unmasked market data.

This prospectus is to give you a snapshot and an idea of what to expect. To express interest in the full report and live market dashboard contact us:

- Fill up the form at: <https://bit.ly/3RcGxLA>
- or Scan the below QR code to access the form



### 3.5 Next on Sentiment Crunch

#### Calendar



- February, 27 - Restaurants Annual Sentiment Report 2022
- March, 31 - Hotels Annual Sentiment Report 2022



# UAE



## Leisure & Entertainment 2022 Annual Sentiment Report (Prospectus)

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