Middle East Airlines Analysis

2017
Executive summary

Over a 3 month period BrandsEye tracked over 536,158 mentions on four Middle East Airlines: Qatar, Emirates, Etihad and Saudia (Saudi Airline) in order to gauge their overall performance of the airlines based on sentiment and to unpack the factors driving the sentiment.

**Global conversation** - Among the top three airlines in the study (Qatar, Emirates and Etihad) conversation was dominated by foreign travellers with the United States and the United Kingdom, the two biggest contributors, accounting for a third of all conversations about the airlines.

**Drivers of positive sentiment** - In general, positive sentiment was driven by factors linked to high quality travel experience. These included airports lounge experience, smooth check in process, luggage tracking systems, comfortable inflight seating, high quality business & first class, food quality, good connectivity, entertainment choices cost. Affordability was also a very popular topic especially when comparing airlines to other locations.

**Effective crisis management, value of a strong brand** – On 5 June, political sanctions were imposed on Qatar, these sanctions had a major impact on the airline and its passengers resulting in an immediate drop in positive sentiment. Despite the inconvenience caused by the sanctions within 48 hours of implementing processes to deal with the crisis, daily sentiment began recovering.

**Repeat purchases** - The outcome of the research showed that consumers decision to make a purchase with a specific airline is closely linked to their previous flight experience. These factors include the airport lounge, ground staff, check in process and inflight experience, these are generally the same factors that drive positive conversation and sentiment in general.

**People like to share bad news** – Consumers don’t always talk about their positive experience but the moment something goes wrong people share news and the more topical it is, the faster it spreads. This was seen in the research where negative posts often attracted more engagement, examples included consumers calling for a boycott of Saudia due to the DinaAli kidnap case.

**Brand comparison** – The majority of people flying with the main Middle Eastern Airlines are foreign and have had experience travelling with other airlines. Due to this they often compare the experience of flying with Middle East airlines against their own local carriers. This is common with US and UK passengers, with their local airlines generally being talked about in a negative light. This was done following the United Airlines incident.
Sentiment over time per brand

MAR - MAY 2017

- **Emirates Airlines**
  - March: 21.0%
  - April: 17.2%
  - May: 10.9%

- **Qatar Airlines**
  - March: 12.8%
  - April: 8.2%
  - May: 6.8%

- **Saudi Airlines**
  - March: 28.6%
  - April: 15.3%
  - May: 13.4%

- **Etihad Airways**
  - March: 21.7%
  - April: 16.3%
  - May: 14.2%

BrandsEye

The Opinion Mining Company.
Volume of mentions

MARCH - MAY 2017

March
- Emirates Airlines: 62,980
- Qatar Airlines: 54,335
- Saudi Arabian Airlines: 10,845
- Etihad: 16,910

April
- Emirates Airlines: 121,423
- Qatar Airlines: 58,971
- Saudi Arabian Airlines: 19,781
- Etihad: 29,954

May
- Emirates Airlines: 59,230
- Qatar Airlines: 51,970
- Saudi Arabian Airlines: 28,821
- Etihad: 31,841
Volume per platform

MAR - MAY 2017

- Emirates Airlines: 143,548 Twitter, 86,712 Facebook
- Qatar Airlines: 120,560 Twitter, 15,987 Facebook
- Saudi Arabian Airlines: 55,071 Twitter, 2,055 Facebook
- Etihad: 19,105 Twitter, 37,781 Facebook
Net sentiment per month

MAR - MAY 2017

March:
- Emirates Airlines: 20.0%
- Qatar Airlines: 39.0%
- Saudi Arabian Airlines: -13.0%
- Etihad: 3%

April:
- Emirates Airlines: 23.0%
- Qatar Airlines: 29.0%
- Saudi Arabian Airlines: 17%
- Etihad: -24.0%

May:
- Emirates Airlines: 27.0%
- Qatar Airlines: 38.0%
- Saudi Arabian Airlines: 17%
- Etihad: -33.0%
### Sentiment

**AIRLINE TOPIC COMPARISON**

<table>
<thead>
<tr>
<th>MAIN TOPICS</th>
<th>POSITIVE Emirates</th>
<th>Qatar</th>
<th>Saudi</th>
<th>Etihad</th>
<th>NEGATIVE Emirates</th>
<th>Qatar</th>
<th>Saudi</th>
<th>Etihad</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflight amenities</td>
<td>79.0%</td>
<td>92.4%</td>
<td>34.0%</td>
<td>83.8%</td>
<td>19.9%</td>
<td>6.7%</td>
<td>64.9%</td>
<td>12.4%</td>
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<tr>
<td>Aesthetics</td>
<td>85.5%</td>
<td>90.9%</td>
<td>61.4%</td>
<td>89.5%</td>
<td>8.8%</td>
<td>4.7%</td>
<td>38.6%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Ethics</td>
<td>13.8%</td>
<td>9.4%</td>
<td>0.5%</td>
<td>35.7%</td>
<td>85.2%</td>
<td>89.9%</td>
<td>97.1%</td>
<td>63.8%</td>
</tr>
<tr>
<td>Staff</td>
<td>40.8%</td>
<td>59.5%</td>
<td>12.1%</td>
<td>50.0%</td>
<td>59.2%</td>
<td>39.7%</td>
<td>81.9%</td>
<td>49.5%</td>
</tr>
<tr>
<td>Product / Brand</td>
<td>65.7%</td>
<td>60.1%</td>
<td>24.5%</td>
<td>55.5%</td>
<td>27.3%</td>
<td>30.4%</td>
<td>69.1%</td>
<td>35.8%</td>
</tr>
<tr>
<td>Airport Experience</td>
<td>30.2%</td>
<td>53.6%</td>
<td>13.8%</td>
<td>40.6%</td>
<td>69.8%</td>
<td>46.4%</td>
<td>80.5%</td>
<td>58.1%</td>
</tr>
<tr>
<td>In-flight service</td>
<td>58.6%</td>
<td>73.6%</td>
<td>13.8%</td>
<td>58.2%</td>
<td>40.9%</td>
<td>25.6%</td>
<td>81.3%</td>
<td>40.4%</td>
</tr>
<tr>
<td>Turn around time</td>
<td>5.7%</td>
<td>10.9%</td>
<td>7.0%</td>
<td>4.3%</td>
<td>94.3%</td>
<td>89.1%</td>
<td>92.0%</td>
<td>95.7%</td>
</tr>
<tr>
<td>Luggage</td>
<td>17.4%</td>
<td>21.0%</td>
<td>13.2%</td>
<td>7.9%</td>
<td>81.9%</td>
<td>78.1%</td>
<td>76.5%</td>
<td>90.1%</td>
</tr>
<tr>
<td>Affordability &amp; Pricing</td>
<td>32.7%</td>
<td>71.9%</td>
<td>12.0%</td>
<td>51.6%</td>
<td>65.5%</td>
<td>28.1%</td>
<td>86.7%</td>
<td>47.3%</td>
</tr>
<tr>
<td>Special offers / Promotions</td>
<td>71.1%</td>
<td>94.4%</td>
<td>21.6%</td>
<td>77.0%</td>
<td>28.9%</td>
<td>5.6%</td>
<td>78.4%</td>
<td>12.0%</td>
</tr>
</tbody>
</table>

MAR - MAY 2017
**Topics**

**CONTRIBUTION TO THE OVERALL CONVERSATION**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflight amenities</td>
<td>10%</td>
</tr>
<tr>
<td>Aesthetics</td>
<td>10%</td>
</tr>
<tr>
<td>Ethics</td>
<td>10%</td>
</tr>
<tr>
<td>Staff</td>
<td>9%</td>
</tr>
<tr>
<td>Turn around time</td>
<td>8%</td>
</tr>
<tr>
<td>Airport Experience</td>
<td>8%</td>
</tr>
<tr>
<td>In flight service</td>
<td>7%</td>
</tr>
<tr>
<td>Product/Brand</td>
<td>8%</td>
</tr>
<tr>
<td>Luggage</td>
<td>6%</td>
</tr>
<tr>
<td>Affordability &amp; Pricing</td>
<td>5%</td>
</tr>
<tr>
<td>Special offers / Promotions</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Note that the topic listed above provides an indication of the main topics impacting the airline industry.*
Qatar Airlines

OVERALL SUMMARY

BRAND MENTIONS
165,265

UNIQUE AUTHORS
94,924

ADVERTISING VALUE EQUIVALENT
$153,950,934

O.T.S. GENERATED
8,953,515,529

PLATFORMS

Facebook: 16.6%
Instagram: 9.0%
Twitter: 73.9%
Other: 0.4%

SENTIMENT

Positive: 44.0%
Negative: 9.0%
Neutral: 47.0%

MAR - MAY 2017
The word “flight” appeared 342 times in negative conversations. Consumers also used the word “disappointed” 125 times to complain about poor customer service, delays of flights, slow replies on online complaints and lost luggage.

• #boarding was retweeted 115 times to report electricity outrage which happened before boarding of a Qatar flight in March.

• Online authors demanded the removal of the airline advert on Breitbart news network, which has been associated with racism.

• The electronic ban order generated negative sentiment as passengers were concerned about the safety of their devices and being unable to work on their laptop during the trip.

• A post by the airline announcing it launching the Qsuite a luxurious business class cabin generated 10 553 positive mentions.

• Passengers expressed their love to fly with Qatar and their intention to fly again with them.

• Passenger’s praised Qatar’s inflight entertainment system which has over 3 000 channels to chose from.
Sentiment analysis

QATAR AIRWAYS

MONTHLY VOLUME
58 412

OTS
2 778 965 306

NEGATIVE

- A tweet from a passenger complained over being homophobically treated by an airline staff member resulted in a number of posts around the incident which also led to more comments the following month.
- The word “Customer” was mentioned 274 times in reference to bad services consumers received inflight, on ground and online booking.
- The word experience was mentioned 136 times and was associated with negative sentiment over delayed flights, lost luggage and poor handling of issues.
- The word ticket was mentioned in a negative way 82 times referring to system errors while booking online or being charged incorrectly.

POSITIVE

- A post by Dublin Airport to win 2 return tickets to Australia or New Zealand in partnership with Qatar Airways generated 8 123 positive mentions.
- Consumers reacted positively to an article by Al Watan news site that Qatar Airways was planning to buy shares in Lufthansa.
- The Airways launching double bed service in business class, a world first, generated 467 positive mentions.
- Expanding their travel network to Mombasa, Accra and Abidjan also generated positive mentions from consumers.

54% 38% 8%

NEGATIVE NEUTRAL POSITIVE

Sentiment based on statistically relevant sample excluding brand mentions
Sentiment analysis
QATAR AIRWAYS

MONTHLY VOLUME  OTS
50 886       2 481 158 011

NEGATIVE

• A tweet by @fivezero_ca resulted in 116 negative mentions, after an advert of the airline showed up The Rebel, a Canadian alt-right website, which has racist undertones.
• Passengers continued to complain over customer service and delayed flights as well as lost luggage.
• #boycottQatarAirways was posted by the LGBT community and generated some negative sentiment towards the airline, the community demanded the boycotting of the airline due to harsh law against gay people in the State of Qatar. This was also on the back of treatment of a gay passenger the previous month.

POSITIVE

• The airline renewing their partnership with AlAhli Saudi club generated 5 473 positive mentions, showcasing the value of sports sponsorship.
• A free stopover offer from the airline for passengers in transit in partnership with Qatar Tourism Authority generated positive sentiment towards the airline.
• Their were 1 296 positive mentions related to business class experience with consumers expressing their satisfaction while booking in this class.

Sentiment based on statistically relevant sample excluding brand mentions
Example mentions

QATAR AIRWAYS

Tony::Nassar
@TonyNassar

@qatarairways yeah we reached #Qatar safe, crew is amazing, captain so helpful & they fixed the plane within 20 minutes, thanks 🎩
30 Mar 2017 06:37

MayyasPR
@MayyasPR

🎉 Dear @qatarairways you dont even answer emails and you have the worst customer service, Very disappointed!! #RT #Qatar #Airlines
20 Mar 2017 08:05

Khalifa Al-Thani
althani350

One magical morning 🎨: @qatarairways @ig_color
17 Apr 2017 20:22

The Opinion Mining Company.
Qatar Airways overview

MAR-MAY 2017

NEGATIVE SENTIMENT
9%

POSITIVE SENTIMENT
44%

During the research period (1 March – 31 May) Qatar Airways came out as the top airline, both in term of positive sentiment 44%, against the next best airline Emirates at 39%. Qatar also has the least negative conversation relative to their volume at 9%, 7% better than Emirates and Etihad and 31% less negative that Saudi who was highest at 40%.

Positive: Passengers praised the airline for the quality experience, flight service and the friendly cabin crew. Positive mentions highlighted the excellent business class experience and the memorable quality experiences shared with the airline in general. There was also positivity around the quality of the food served. Positive mentions about the airlines various coupon deals, the student flight offers and the discounted travel packages. Luggage is generally a very negative topic across all airlines with passengers only discussing it when something goes wrong, Qatar however did garner some positive sentiment for their Track My Bags mobile app.

The findings back up the recent study published by Skytrax which voted Qatar Airways the best airline for 2017.

Negative: Relative to the positive mentions the volume of negative posts were far less, there were however some issues raised around luggage with complaints around lack of compensation, items being stolen, luggage not being delivered as promised and lack of communication around these issues. Some passengers also highlighted issues around customer service which included waiting on phone for an extended period, slow response times via email and the lack of clear complaints procedure.
Qatar Crisis
HOW DID THE QATAR POLITICAL CRISIS IMPACT THE AIRLINE
Daily sentiment analysis
QATAR POLITICAL CRISIS

Jun 2017

01 JUN-30 JUN 2017

Positive
Negative
Positive (excl. award conversation)
Weekly sentiment
QATAR POLITICAL CRISIS

01 JUN - 30 JUN 2017
Monthly sentiment
QATAR POLITICAL CRISIS

01 MAR-30 JUN 2017

0.00% 10.00% 20.00% 30.00% 40.00% 50.00% 60.00%

01-31 March 01-30 April 01-31 May 01-30 June

Negative Positive
The airline’s decision to give 100% refunds to passengers affected by flight cancellations and to find alternate routes where necessary drove positive sentiment. Refunds were first commented on online approximately 10 days after the crisis began.

• Compliments around inflight services and friendly staff on board continued.

• Consumers praised the way that the airline managed the crisis, praising its flexibility to make crucial decisions in tough times. This included the way the call centre dealt with the crisis once the airline started responding.

• A competition was launched after the sanctions were announced to win free tickets. This generated over 1 000 positive mentions.

• A tweet by the airline in response to the Qatar crisis, “We believe there should be no boarders in the skies only horizons”, generated over 1 000 retweets.

• Refunds were the biggest driver of negative sentiment, with many customers attempting to reach the customer service department to cancel their bookings and request a refund. In the aftermath of the crisis, call center and online service operators failed to attend to demands within 48-72 hours. The refund process was also delayed, a big driver of negative sentiment.

• Many consumers who received refunds for flights cancelled due to the crisis complained that the airline charged them penalties.

• FC Barcelona and FC AlAhli cancelled their sponsorship deal with Qatar Airways. Both the UAE and Saudi banned the Barcelona shirt as it has the Qatar Airways logo on it.

NEGATIVE

POSITIVE

Sentiment based on statistically relevant sample excluding brand mentions.
Sentiment analysis

JUN 01 - JUN 30 2017

MONTHLY VOLUME OTS
112 074 3 812 090 472

NEGATIVE

- Customer service-related queries were responsible for a large amount negative sentiment (over 900 mentions in June). This was mainly due to slow responses to queries around cancelled flights and refunds; some cases had a turnaround time of 2 weeks.

- Consumers complained over system errors when requesting refunds and submitting online queries. The official website and offices were banned in Saudi Arabia and UAE, making it difficult to contact the airline, causing frustration and driving negative sentiment.

POSITIVE

- Winning the Airline of the Year 2017 (20 June) from Skytrax, generated over 2 000 positive mentions.

- A tweet by the Empire State Building in NYC to celebrate 10 years of Qatar Airlines flying to the US generated 1 598 positive mentions.

- Consumers who received refunds for cancelled flights posted positive mentions thanking the airlines.

- Due to a strike by British Airways, BA chartered a flights using Qatar planes, generating a lot of positive sentiment.

Sentiment based on statistically relevant sample excluding brand mentions
Examples of mentions

QATAR CRISIS

1 - 13 JUN 2017

Negative: Complaint over paying penalties after submitting for full refund for a cancelled flight.

Positive 1: Compliment for rebooking a cancelled flight in 10 min phone call.

Positive 2: Compliment for great crisis management and offering alternative options for affected flights
Qatar brand success story

OVERCOMING CRISIS
Despite having to deal with three crisis situations (March – June), during the research period, Qatar Airways was consistently the best performing airline in terms of both positive and negative sentiment. The ability of the brand to overcome bad news brought on by various external factors showcased the strength and resilience of the airline. From the research it seems when it comes to making airline choices, if a brand can provide affordable travel, high quality passenger experience and most importantly deliver on a brand promise, then even a global political crisis will generally only have short term implications on its sentiment and general popularity.

3 crisis issues during the four month analysis
• Travel ban (19 Feb) - Ban imposed by the US on six Muslim majority nations.
• Electronic device ban (20 Mar) - Ban imposed on direct flights to the US originating from Middle East, ban lifted in June / July.
• Sanctions imposed on Qatar (5 June) - Five countries including the UAE and Saudi cut political ties with Qatar.

IMPACT OF THE POLITICAL BAN
Following the sanctions imposed on Qatar Airways, the airline saw an immediate drop in daily positive sentiment, falling from 36% on 4 June to 4% on 5 June. Negative sentiment reached an all-time high on the 6th of June at 33%, but quickly reversed once the airline implemented measures to deal with the crisis. Overall in the month of June despite the sanctions, negative sentiment increased to 13%, from the three month average of 9%, with positive dropping during the same time period from 44% to 34%, still overwhelmingly positive.

CRISIS MANAGEMENT
In response to the sanctions, Saudi and the UAE closed their airspace and shut Qatar Airways offices in Riyadh and Dubai; flights to and from Doha from 4 countries were also cancelled. This drove negative sentiment, which was initially very high, with the airline slow to respond to queries around refunds and general travel arrangements. On the 6th of June the airline started to communicate to passengers affected by the crisis, directing them to visit the official website to get more information about refunds and the rebooking process. Negative sentiment was limited due to the effective refund process brought in, the rerouting of flights (8 June) using airspace over Iran, Iraq and Turkey and the use of planes from Oman Airways to transport passengers who were stuck in Dubai and Riyadh. These initiatives along with various others used to manage the crisis saw the airline regain most of its lost sentiment within a couple of weeks of the incident.
Full report available on request.

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