Introduction

Identify:

- Perception of Greece as a tourism destination
- Average spending on holidays in Greece
- Perceived value for money
- Overall satisfaction of experience in Greece
- The main sources UK consumers gather information from on Greece
- Where Greece stands in comparison to its competitors
Methodology

• Mixed methodology

• Consumer Research
  – 1,000 online interviews among a nationally representative sample of the UK
  – Respondents sourced from an online panel
  – Fieldwork conducted October 2012

• Trade Research
  – GNTO provided contacts of trade professionals to contact
  – Mix of operators and agents
  – Mix of mass market and specialist operators
  – In depth telephone interviews
Cosmopolitans

Confident, stylish, and willing to give anything a go once

- Strong, active, confident and stylish
- Do what they want rather than follow any particular fashion
- Risk takers – a desire for things that are new and different
- They like new challenges, both physical and intellectual
- Life for this group is full and active, but with an appreciation of art and culture
- Comfortable trying new things that are out of the ordinary
- Happy to adopt traditional values when appropriate
- Find it easy to justify buying expensive alternatives
- High-spending market
• Like to take their information from other sources rather than discover things for themselves
• Prepared to spend money on luxury which tends to mean more things
• Brand and style are more important than functionality or individuality
• Not the first to adopt new products but they will be ahead of the majority of the market
• An active segment that is moderately interested in intellectual pursuits, arts and culture
• Keen to follow along when a fashion has been established
Followers

Risk averse, these individuals prefer the tried and tested

- Strongly influenced by their peers and by the media
- Unlikely to value things that are new and different
- They will try things that are new to them as individuals
- A similar aversion to what might be considered old fashioned as Style Hounds, but much less interest in ‘new’ options
- Avoid risk and will take up options when others have shown they work
- Lag behind other groups when it comes to new products and services
- Little interest in intellectual challenges, arts & culture
- Service means freebie extras like Satellite TV and sun beds thrown in
Functionals

• Self reliant
• Very price driven and value functionality strongly over style
• Traditional values
• Not prepared to pay for fashion, style or ‘individuality’
• Not early adopters of new ideas
• Interested in new experiences, and happy to try things new to them
• Enjoy intellectual challenges, traditional ‘arts and culture’
• Resistant to spending
• Service is something that they expect as opposed to something they will pay extra for

Sustainers and independent
Discoverers

Valuing technology, authenticity and independence

- Independent individualists
- Not worried about what others might think
- Little influenced by style or brand unless it represents their personal values
- Value technology, new products, services and experiences
- Function far out rates style as a purchase driver
- High spenders on what they want – but intolerant of substitutes or image based advertising
- Enjoy intellectual challenges but ‘arts and culture’ are often negatively perceived
- Value good service – which means enabling them to do what they want
- Live a relatively relaxed pace of life

Independent and innovative
• Self reliant and independent
• Hold traditional values
• Unlikely to justify spending on expensive alternatives.
• Value more traditional established brands
• Functionality is far more important than style and individuality
• Value, and will pay for, good service, which for them means recognition and individual attention
• Enjoy intellectual challenges, arts and culture
• Relaxed pace of life
Style Hounds

Fashion conscious early adopters who actively pursue excitement

- Very brand/ fashion conscious
- Do not want to be seen as old fashioned
- Early adopters
- Will pay for better service – which to them means ‘more to do’ or more fun
- No real interest in ‘sophisticated’ arts, or cerebral activities
- Fun and excitement is what defines a good time
- Risk takers - they live a full and active life
- Like to be part of the latest trends
- Strongly influenced by others
- Ready to spend money

Innovators and mass market
Habituals

Strongly averse to change, these individuals hold dear traditional values.

- Strongly traditional
- Strongly resistant to change preferring the familiar
- Value a more relaxed pace of life
- Purchase decisions made on function
- Fashion has little meaning to them
- Very risk averse and show little interest in new options or opportunities
- No interest in arts or culture
- Spend little money, on brands or service
- Find it hard to justify expense of any sort
- Often have limited income

Mass market and sustainers
In order to make the research more valuable, we screened out people who have not been on an overseas holiday in the past 5 years.

We are speaking to people who are more likely to be in the market for an overseas holiday.

Final sample of overseas holiday takers is 1,011.
Holiday taking to Greece in the past 5 years

- Very much like market trends
  - On next slide

- Spain is most popular destination country among those tested

- Greece has very similar destination profile visit history as Italy

Base: 1,011 overseas holiday takers in the past 5 years
Trends in UK residents holiday taking

Source: International Passenger Survey

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Importance of trade

- Package market and therefore the trade are very important to Greece
- The proportion of package trips has declined as more independent options open up
- Consumers seeking security and convenience

Source: International Passenger Survey
Average spend by UK holiday makers

Average spend per trip

- Egypt
- Italy
- Spain
- Turkey
- Greece

Average spend per night

- Egypt
- Italy
- Spain
- Turkey
- Greece

Source: International Passenger Survey
Issues affecting trends (from trade discussions)

• 2012 expected to be similar to 2011
  – More Greece product went late, but still got sold
  – Late deals are becoming more popular year on year
  – Consumers concerns over personal wealth and looking for best deals

• 2011 was maybe unnaturally high for Greece due to unrest in N. Africa diverting sales from there to Greece
Greece destinations considered & visited

- The Islands are by far the most popular area visited
- This is a factor of what is on offer for most holiday customers
- A city offer is still popular for 1 in 5 people

Base: 781 Greece considerers & visitors
Destination awareness

Greece destination awareness

Base: 1,011 overseas holiday takers in the past 5 years

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My type of thing on holiday

Base: 1,011 overseas holiday takers in the past 5 years
My type of thing – age group

Base: 1,011 overseas holiday takers in the past 5 years
My type of thing - lifestage

Base: 1,011 overseas holiday takers in the past 5 years
My type of thing - segments

Base: 1,011 overseas holiday takers in the past 5 years
Greece suitability

- Greece is seen as most suitable for a holiday with a partner
- Followed by adult groups
- Those with children more likely to say that it is suitable as a family destination

Base: 1,011 overseas holiday takers in the past 5 years
Association of product with Greece

Base: 1,011 overseas holiday takers in the past 5 years

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Who is more likely to associate product with Greece

Index of strong association with Greece by age group

Base: 1,011 overseas holiday takers in the past 5 years
Who is more likely to associate product with Greece

Index of strong association with Greece by segment

*Base: 1,011 overseas holiday takers in the past 5 years*
Best in class

Base: 1,011 overseas holiday takers in the past 5 years
Statements

Statements about Greece

- Greece is as safe to visit now as it ever was:
  - Agree (7-10): 43%
  - On the fence (4-6): 67%
- Greece needs the help of tourists like me:
  - Agree (7-10): 67%
  - On the fence (4-6): 33%
  - Disagree (0-3): 31%
- Greece is as appealing now as it ever was:
  - Agree (7-10): 51%
  - On the fence (4-6): 38%
  - Disagree (0-3): 21%
- Because of the current economic climate it is cheap to visit Greece:
  - Agree (7-10): 32%
  - On the fence (4-6): 34%
  - Disagree (0-3): 34%
- Because of recent news I have been put off from visiting Greece:
  - Agree (7-10): 45%
  - On the fence (4-6): 45%
  - Disagree (0-3): 28%
- The places I would consider visiting are less affected by the economic situation in Greece:
  - Agree (7-10): 33%
  - On the fence (4-6): 34%
  - Disagree (0-3): 34%
- Greece should remain part of the Eurozone:
  - Agree (7-10): 25%
  - On the fence (4-6): 47%
  - Disagree (0-3): 53%
- Spending cuts in Greece have affected the quality of the offer:
  - Agree (7-10): 16%
  - On the fence (4-6): 84%

Base: 1,011 overseas holiday takers in the past 5 years

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Previous visitors likely to remain positive

Index of positive agreement with statement

- Greece needs the help of tourists like me
- Greece is as appealing now as it ever was
- Greece is as safe to visit now as it ever was
- Because of the current economic climate it is cheap to visit Greece
- The places I would consider visiting are less affected by the economic situation in Greece
- Because of recent news I have been put off from visiting Greece
- Spending cuts in Greece have affected the quality of the offer
- Greece should remain part of the Eurozone

Base: 1,011 overseas holiday takers in the past 5 years
Who is more likely to be affected by media coverage

- Greece needs the help of tourists like me
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Index of positive agreement with statement

18-24
25-34
35-44
45-54
55-64
65+

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Likelihood to visit

- Very similar to the visit profile and the market profile

Base: 1,011 overseas holiday takers in the past 5 years
Satisfaction

- Satisfaction is high among visitors

- Trade interviews highlighted Greece having excellent hospitality

- Overall, 79% would recommend Greece which is in line with the ‘meeting your needs’ statement

- The 2 least positive elements were accommodation and cleanliness

Base: 366 visitors to Greece in the past 5 years
Sources of information

- General web searches are very popular for holiday information
  - Easy to get information from 1 source
- Consumer review websites are increasingly popular
  - Seen as less biased than reviews on company websites
  - More tour ops are using Tripadvisor reviews
- Social media has not been utilised to any successful degree by holiday companies

Base: 1,011 overseas holiday takers in the past 5 years
Sources of information by age

Index of main source of information

Base: 1,011 overseas holiday takers in the past 5 years
Sources of information by SEG

Base: 1,011 overseas holiday takers in the past 5 years
What should GNTO be doing?

- Joint marketing that is going on is seen as a good thing
  - Operators like their Tourist Boards to spend money on marketing
- Turn the negative press around; don’t hide behind it
  - The N. African tourist boards (Tunisia & Egypt) very good at this after unrest in 2011
- Concerns consumers have raised with operators & agents:
  - Rioting – easily overcome by explaining that holiday resorts far removed from what is happening in Athens
  - What happens if Greece exits the Euro
    - Money out of cash machines
    - Transport arrangements
What should GNTO be doing?

• Highlight that Greece is open for business
• Listen to the trade – they are at the front line – don’t dictate to them
• Educate the trade
  – Get them to experience the product so they are better able to explain to clients
• Have constant communication with the trade
  – Not necessarily meetings; could be telephone calls
  – Ask them what they know and tell them what you know (e.g. where capacities are shifting)
• Differentiate – become known as best in class for something that consumers want
TOP TAKEOUTS
Market Context

• Currently Greece is heavily reliant on tour operators selling holiday packages
  – Three-quarters of holidays to Greece are package holidays

• Implications are:
  – Greece therefore sold on elements of the package ... not necessarily on destination attributes
    • Key purchase driver has become **value / price**
  – Positive sales messages are being diluted
    • Does the trade really know what makes Greece stand out / what experiences Greece can offer / differences in offer across the different Islands?
    • Does the trade accurately portray the Greek holiday offer ... or do they stop short at images of beach / hotels
  – Is the type of customers that buys a package holiday the type of customer that Greece wants to attract?
TOP TAKEOUTS
Perceptions of Greece

• Consumers strongly associate Greece with
  – Beach
  – Scenery
  – Local Tavernas & Restaurants
  – Historic Sites & Monuments

• Strong knowledge of Greek Island names
  – But often they don’t know what each Island has to offer

• Reason for visiting is ill informed
  – People visit just for sun and beach … yet it has so much more to offer

• A shift in how Greece presents itself is required
  – Educate the industry through fam trips / e-learning
  – Marketing needs to be consumer-led … sell the experiences as well as the product on offer
TOP TAKEOUTS
Changing Perceptions

• Stakeholders realise they need to invest in marketing in current climate
  – Time has come to work together more closely with the industry

• Recent joint marketing campaigns have been widely deemed as successful
  – Triggered an instant increase in sales activity

• Don’t dictate joint activity ... work with stakeholders
  – They have systems in place / flexibility re yield management that can stimulate sales if combined with the right messages

• Adopt constant 2-way dialogue between Tourist & Stakeholders
  – Combined knowledge can lead to more appealing campaigns / increased ROI
TOP TAKEOUTS
How can Greece stand out?

- Greece needs to stand / differentiate itself from sun / sea / beach destinations
  - Fact of the matter is that other destinations are seen to offer better experiences sold in relation to sun / sea / beach holidays
- Need to promote the aspects that make Greece stand out
  - Hospitality
  - Value (not price)
  - Real beaches (not Spanish beaches)
  - Unspoilt destination / scenery
  - Local culture
  - Variety of experience across different island
- This will make Greece stand out as a destination of choice
  - Not just a place that offers a good deal
TOP TAKEOUTS
Positive & Timely PR

• When a destination goes through hard times it is important that tourist board responds with positive PR messages

• Initially, news reports led to consumer concerns about rioting / safety / transport /money, etc.

• Now the concerns are slightly different and relate to the effect that austerity measures are having on the quality and availability of the tourism product

• Key PR message (backed up by Stakeholders and recent consumers) is that ‘Greece is open for business’

• This needs to be constantly reinforced, especially during key booking periods

• Use the fact that Greece has had a good Summer / visitors numbers remain high

• UK consumers are aware of the importance of tourism to the Greek economy ... and that don’t want to lose it

• Use this as a message for PR / marketing