

Greece Perceptions Research UK Markets

October 2012

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Director

About Arkenford

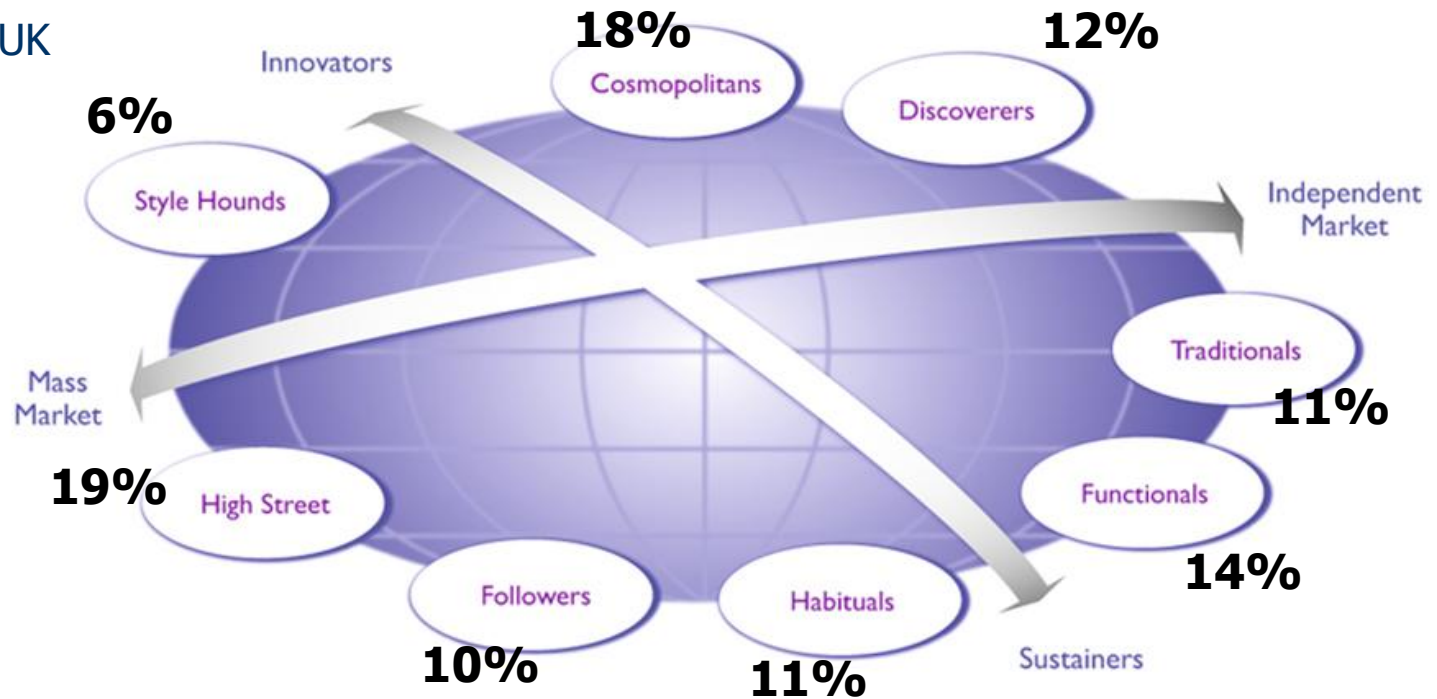
A selection of Arkenford Clients:



- Arkenford delivers strategic insight to destinations in UK & abroad
- Our work informs marketing investment and product development
- Our knowledge of UK consumers helps destinations to identify current *and* potential visitors

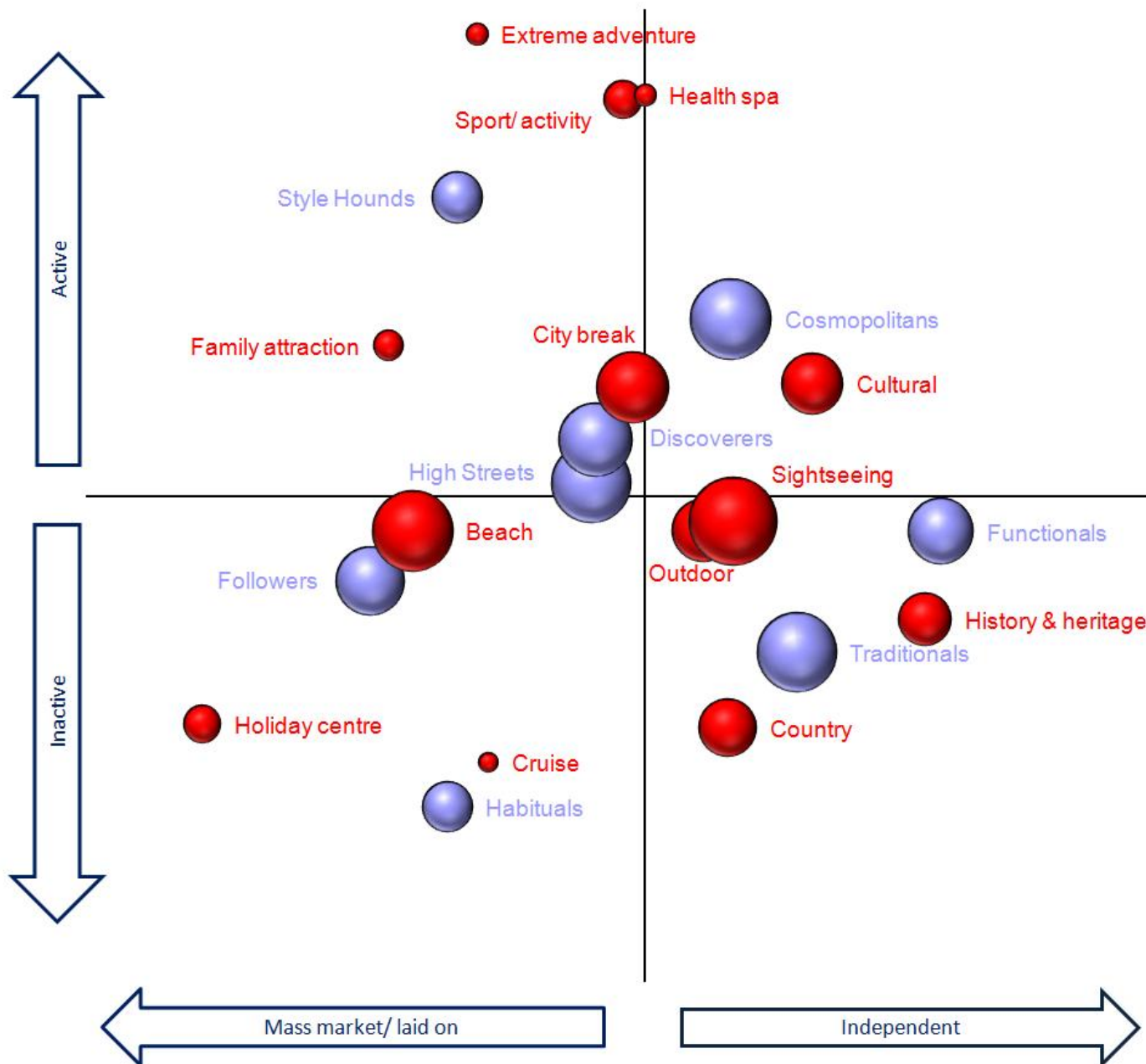
Introducing ArkLeisure

- Whole-Market Segmentation of UK consumers



- Research based segmentation
 - We have segmented over 500,000 UK consumers since 2002, so have built up a strong picture and understanding of different segments
- Knowledge of segments designed to support marketing
 - Readership / internet usage
 - Demographic / lifestage / origin profiles

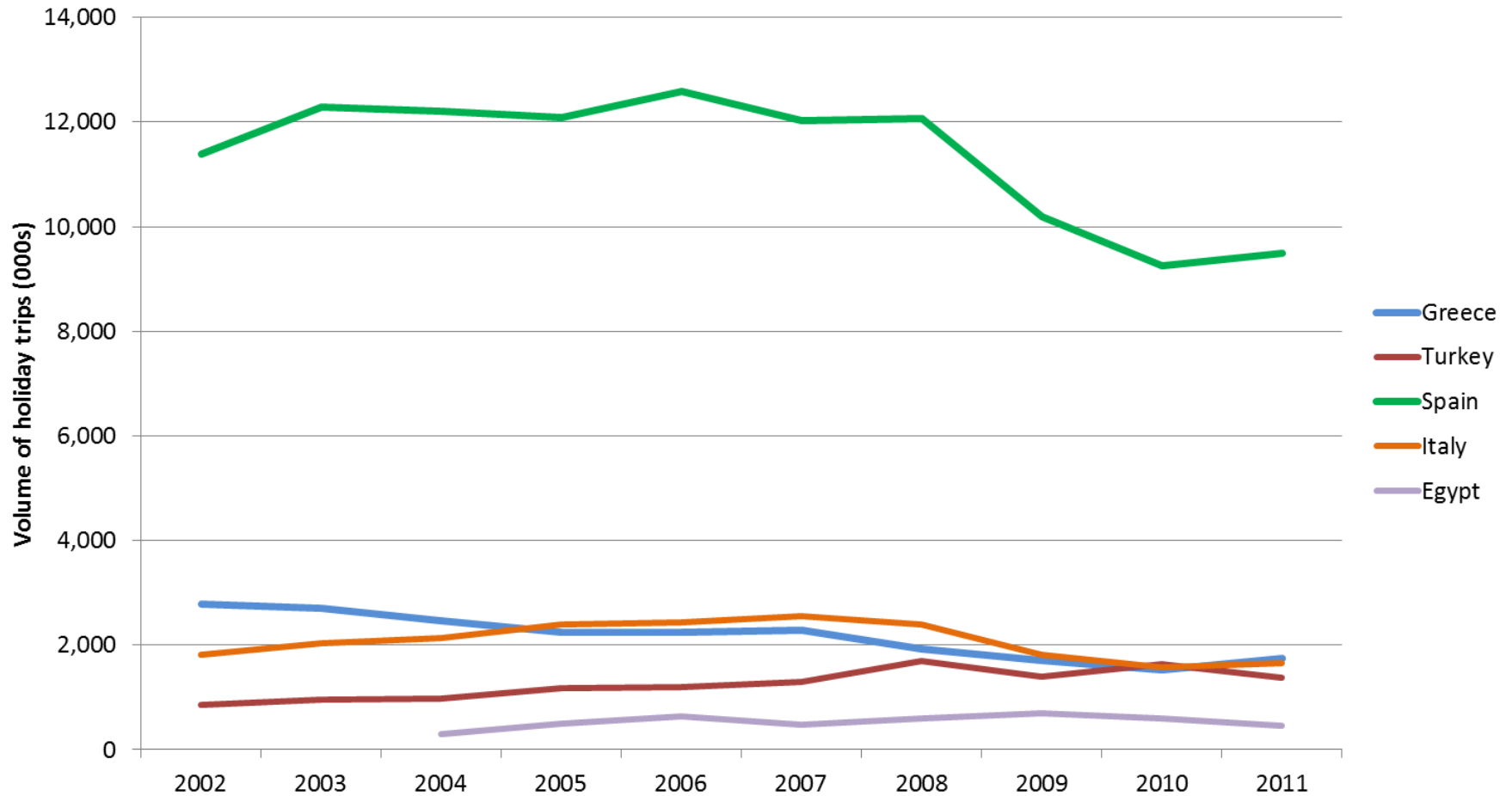
Different people like different holidays ...



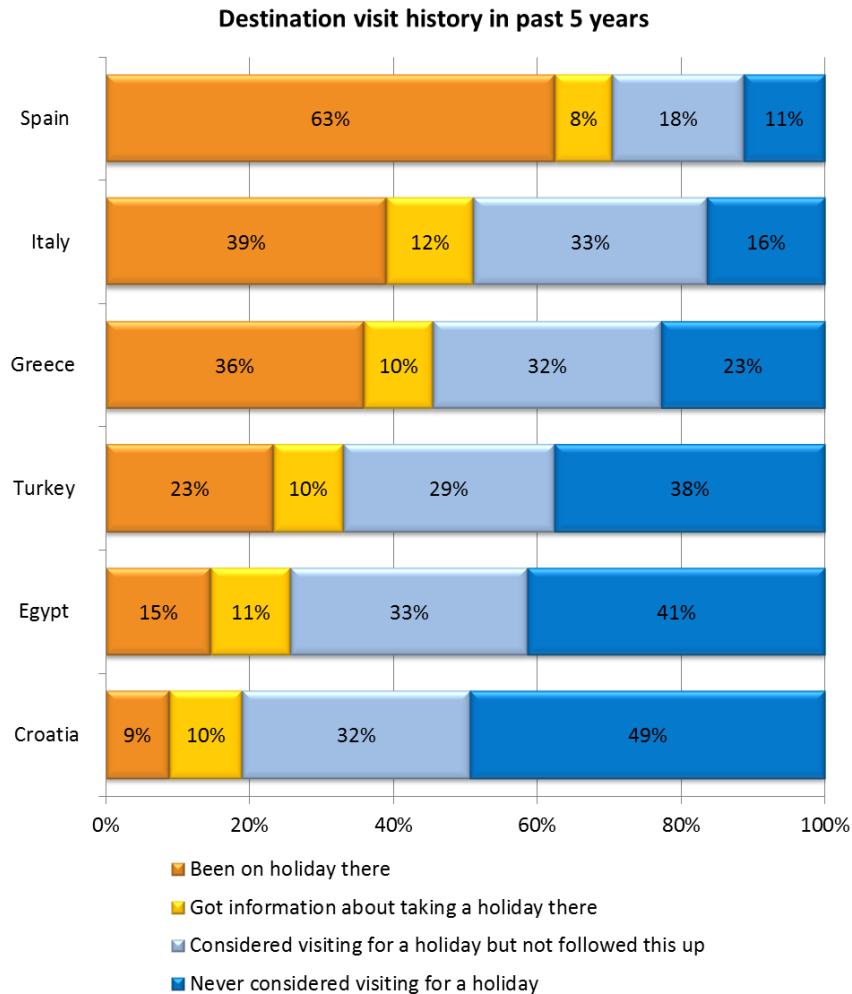
Methodology

- 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

Trends in UK residents holiday taking



Holiday taking to Greece in the past 5 years



- Very much reflects market trends
- Spain is most popular destination country among those tested
- Greece has very similar destination profile visit history as Italy
- How do we convert the third of the market look for information but never follow this up?

Issues affecting trends (from trade discussions)

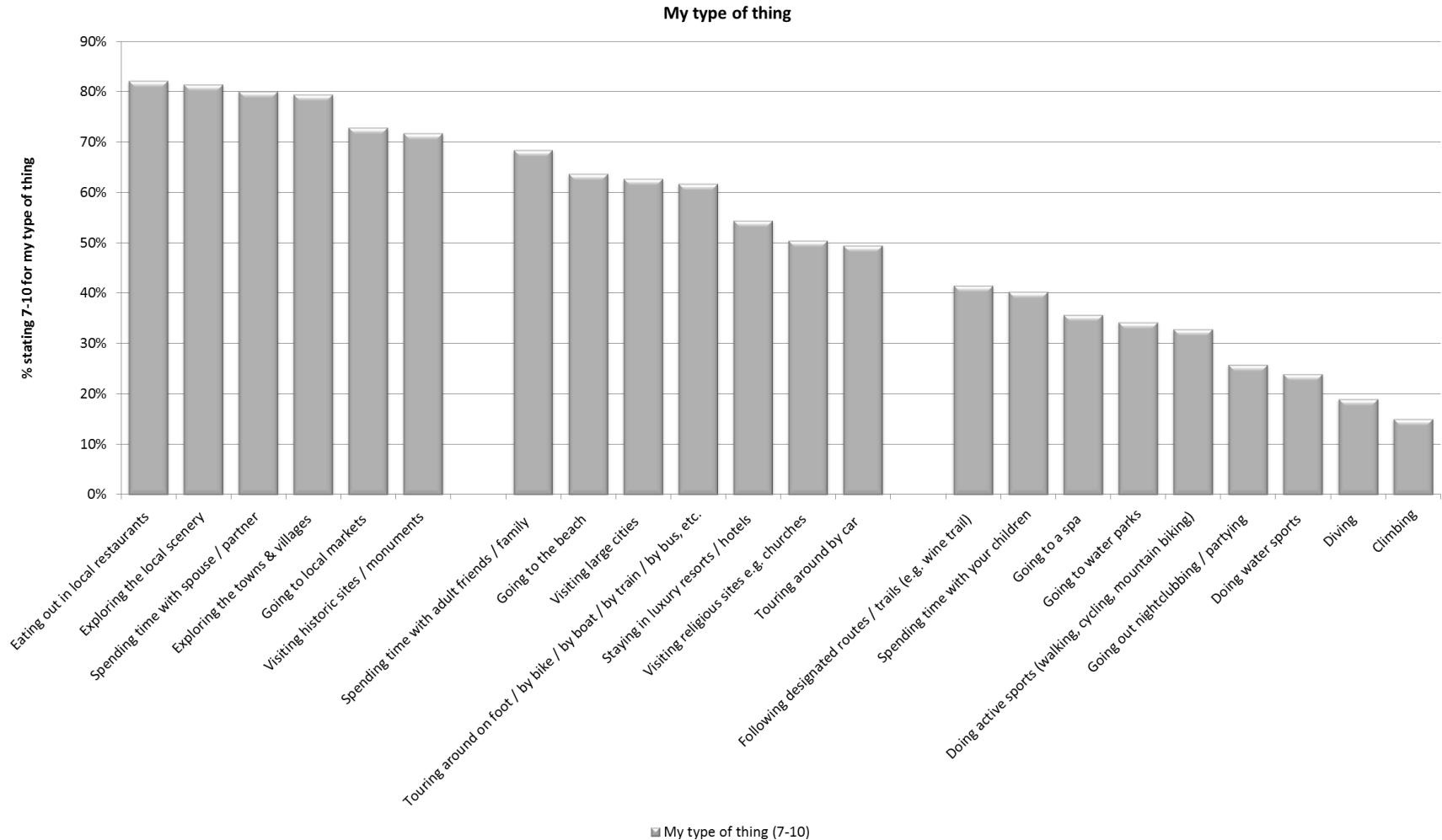
- 2011 was maybe unnaturally high for Greece due to unrest in N. Africa diverting sales from there to Greece
- 2012 expected to be similar to 2011
 - More Greece product went late, but still got sold
 - Late deals are becoming more popular year on year
 - Consumers concerns over personal wealth and looking for best deals

Greece and the UK travel trade



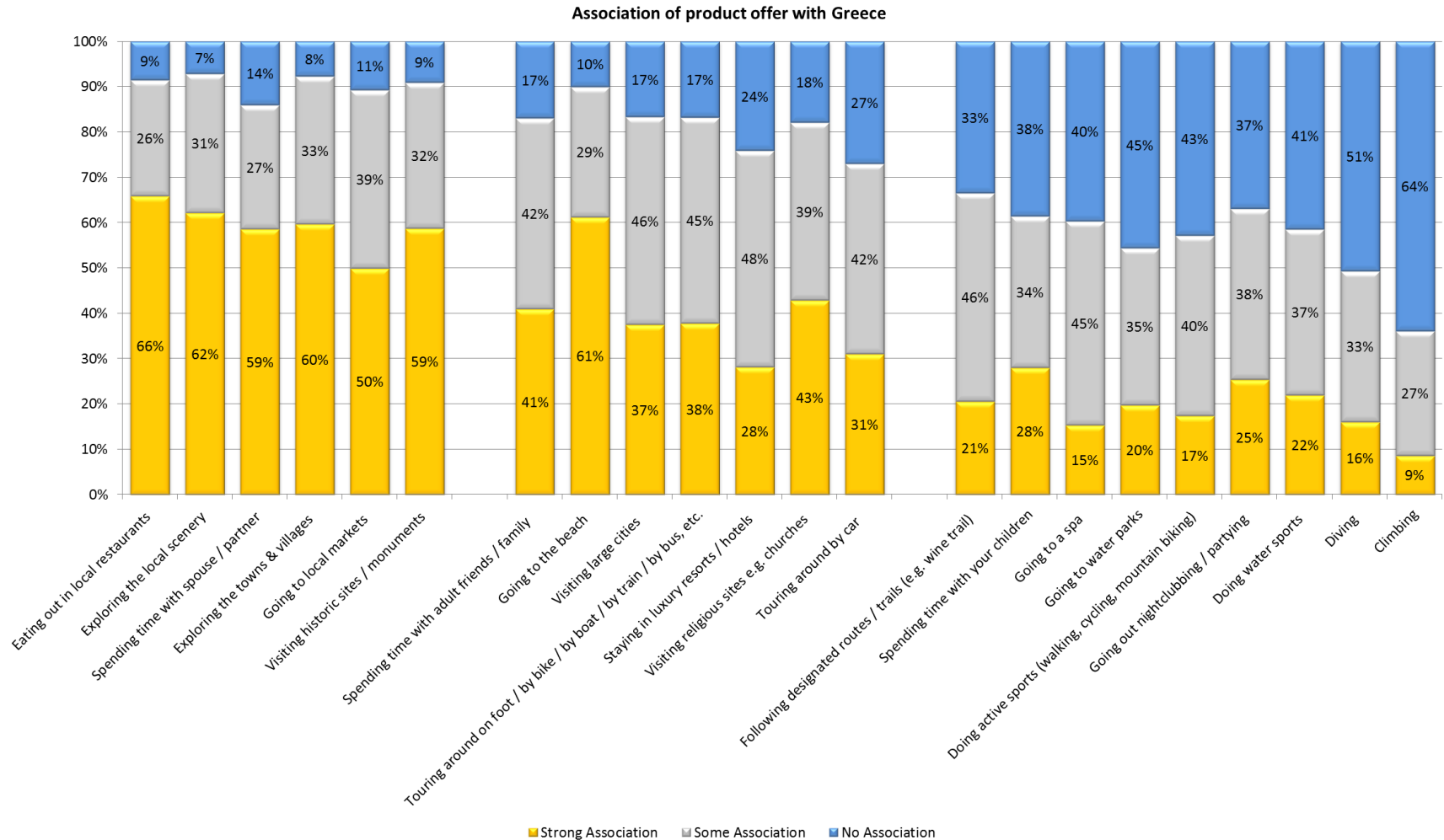
- 73 % Inclusive Tour
- Sold on elements of package
 - Not destination attributes
- Value/ price

My type of thing on holiday



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

Association of product with Greece



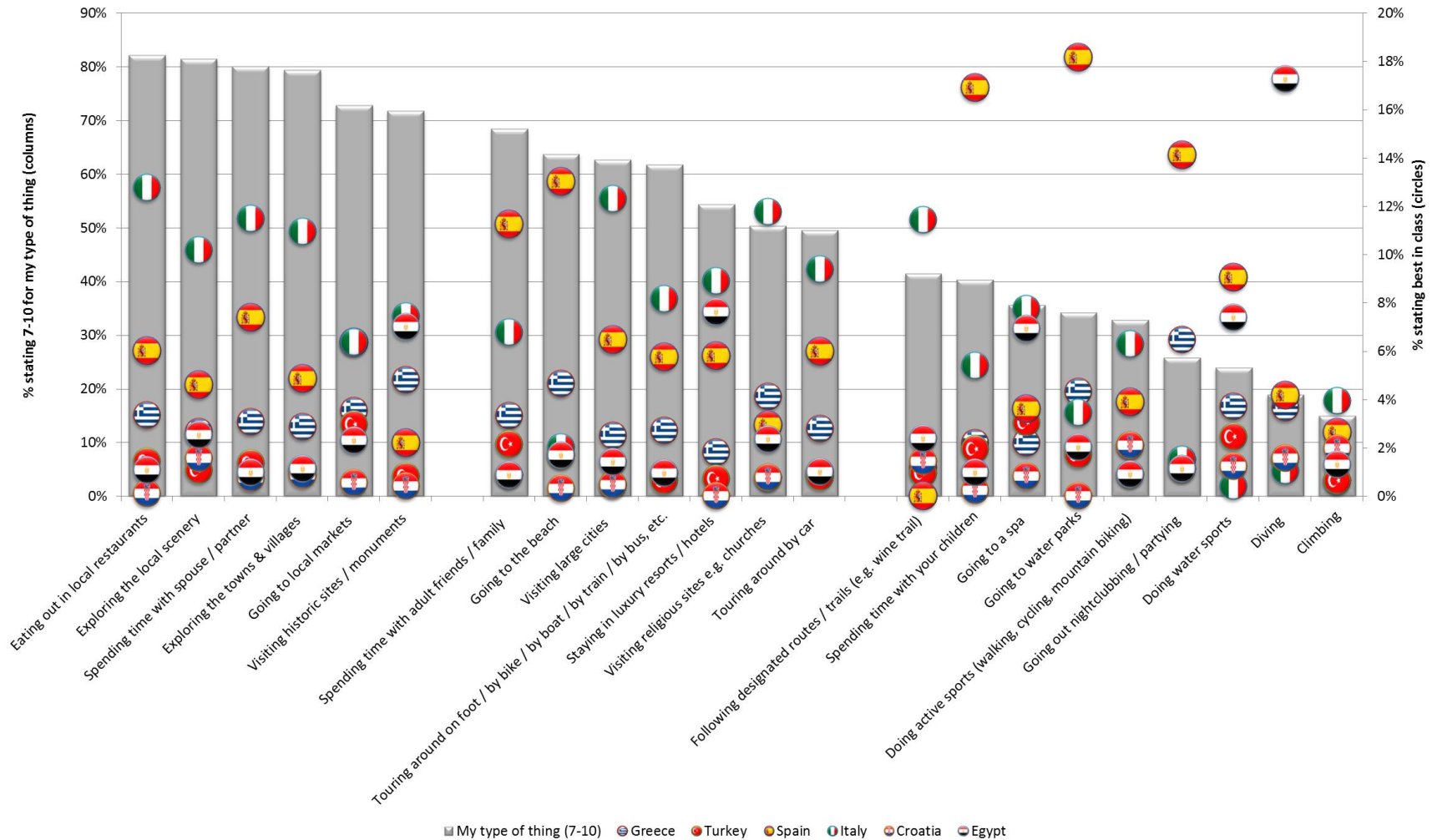
Base: 1,011 overseas holiday takers in the past 5 years

Consumer perceptions of Greece



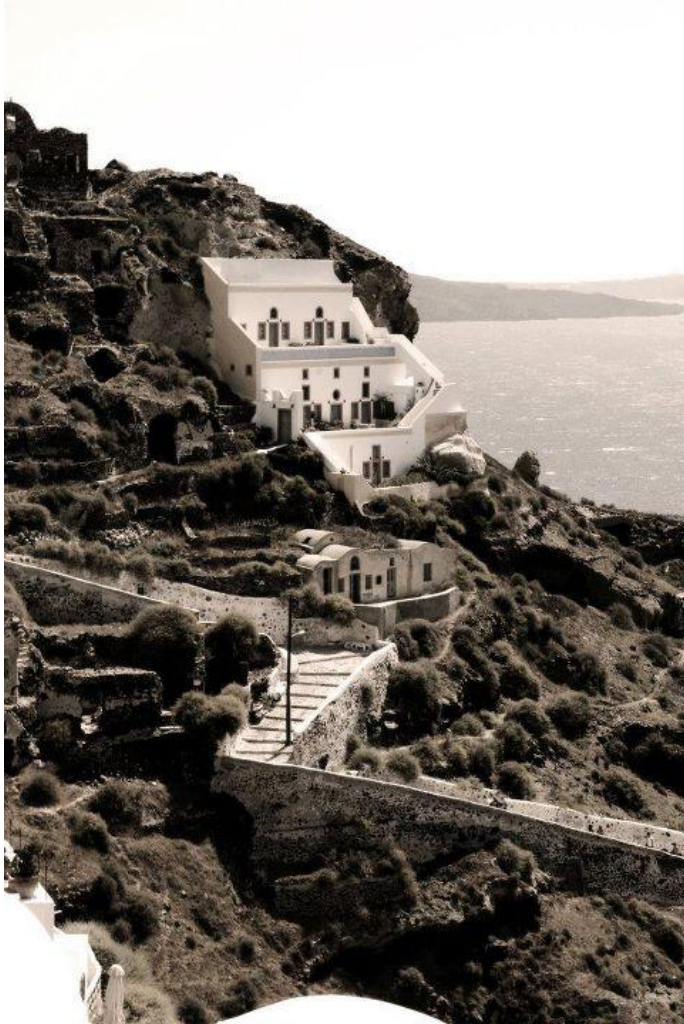
- Beaches
- Scenery
- Local tavernas & restaurants
- Historic sites & monuments
- Strong awareness of island names
 - But lack of awareness about the offer/ experience

Best in class



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

How can Greece stand out?



- Differentiate
- USPs
 - Hospitality
 - Value (not price)
 - Excellent beaches & sea
 - Unspoilt scenery
 - Local culture
 - Different experience available across all the islands
- Educate the trade

Changing or enhancing perceptions



- Work closely with the industry
- Don't dictate to them
- Constant 2 way dialogue
- Joint marketing campaigns

Positive & Timely PR



- Quick response to negative events
- Address consumer concerns
 - Safety
 - Financial
 - Will cuts affect the quality of the offer?
- Reinforce that Greece is open for business

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