TCI Research
Travel Competitive Intelligence

TRAVELSAT
Competitive Index

TRAVELSAT© Competitive Index

Benchmarking the Greece Brand Experience

March 2019, report prepared for:

INSETE

Ευρωπαϊκή Ένωση
Ευρωπαϊκό Κοινωνικό Ταμείο
Επιχειρησιακό Πρόγραμμα
Ανάπτυξη Ανθρώπινου Δυναμικού, Εκπαίδευση και Διά Βίου Μάθηση
Με τη συγχρηματοδότηση της Ελλάδας και της Ευρωπαϊκής Ένωσης
ΕΣΠΑ 2014-2020
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Content

TRAVELSAT© Competitive Index

Introducing the survey methodology

TRAVELSAT Competitive Index

The Global Standard

For benchmarking visitor experience

Why benchmarking your visitor experience is focal!

Prompters for choosing a destination
All destinations in Europe

TRAVELSAT© Competitive Index is **the global independent UNWTO endorsed standard** measuring visitor **experience quality.**

In 2011, the TRAVELSAT© Competitive Index received the prestigious **UNWTO Ulysse Award** recognizing the research program excellence and innovation for Destination Organizations. Since then, 100+ destinations and tourism brands have used TRAVELSAT© successfully, building **the largest competitive research platform for destinations!**

TRAVELSAT© Index

The UNWTO-Awarded reference

UNWTO
INNOVATION AWARD 2011

A global standard for all destinations

Endorsed by international tourism authorities

Trust from 100+ clients in 5 continents

Including local, regional, national Tourism Boards and DMOs in Europe, Caribbean, North America, Middle East, Indian Ocean and Asia Pacific.

60+ indexes on the whole visitor experience

Accommodation, Transportation, Food, leisure and cultural activities, Shopping, Safety feeling, Heritage, Landscape, Hospitality, Cleanliness, Value for money…

Unrivalled competitive benchmarking options

Based on geographical, markets, travel segmentation and geo-topic norms (Cultural explorers, Business/MICE, Millennials, Families, City breakers…)

A reliable methodology

Generating reliable data collection and advanced benchmarking analysis.

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TRAVELSAT Competitive Index

What does TRAVELSAT© Competitive Index measure?

60+ competitive index rating all aspects of the visitor experience

Overall experience (KPIs)
- Overall expectations fulfilment
- Intention to recommend
- Intention to repeat visit
- Intention to repeat visit in the same region/another
- Overall value for money of the stay

Accommodation experience
- Overall quality
- Hospitality of personnel
- Value for money

Local food experience
- Overall quality
- Diversity /choice
- Hospitality of restaurant personnel
- Value for money

Transportation experience
- Cost of transport to reach the destination
- Accessibility of public transport (bus, metro...)
- Hospitality of personnel in public transport
- Price of public transport
- Hospitality at entry point
- Taxi service
- Parking convenience
- Transportation infrastructure (roads...)
- Access to/from the airport
- Signposting/facility of finding your way around

Cultural and leisure activities
- Diversity / range of leisure and cultural activities
- Theater, opera, cultural shows
- Amusement / theme parks
- Price of leisure activities
- Guided tours
- Nightlife (bars, nightclubs...)

Shopping
- Range of shopping possibilities
- Value for money
- Hospitality of personnel in shops
- Opening hours / days
- Quality of handicrafts

Historical heritage (monuments, museums...)
- Diversity and range of historic sites and museums
- Management/maintenance of historic sites and museums
- Hospitality at historic sites and museums
- Entrance fees for historic sites and museums
- Convenience of visiting busy tourist attractions/crowd

Tourist Information Centers
- Number of information centers available
- Efficiency of personnel
- Opening hours /days
- Tourists Apps quality

Beaches / Water activities
- Beauty
- Diversity / range of beaches
- Cleanliness/ upkeep
- Safety for swimming
- Water activities

Environment
- Beauty of landscapes
- Cleanliness of public areas
- Cleanliness outside cities
- Architecture and urban development
- Air quality

Local people hospitality & safety feeling
- Hospitality of local inhabitants
- Ease of communication with local people
- Safety, feeling of security

Business/MICE specific
- Congress centre quality
- Congress center hospitality
- Communication infrastructure

Complaints related to...
- Visa formalities
- Accommodation
- Transportation
- Food
- Activities
- Health
- Security
- Other

Transverse indexes (average for all related criteria)
- Sustainability
- Diversity of things to see, to do, to shop, to visit...
- Human hospitality chain
- Price & value for money chain

How are TRAVELSAT© Data collected?

A flexible multi-sourced recruitment that maximizes cooperation rates, sample quality and data comparability

Screening in outbound markets

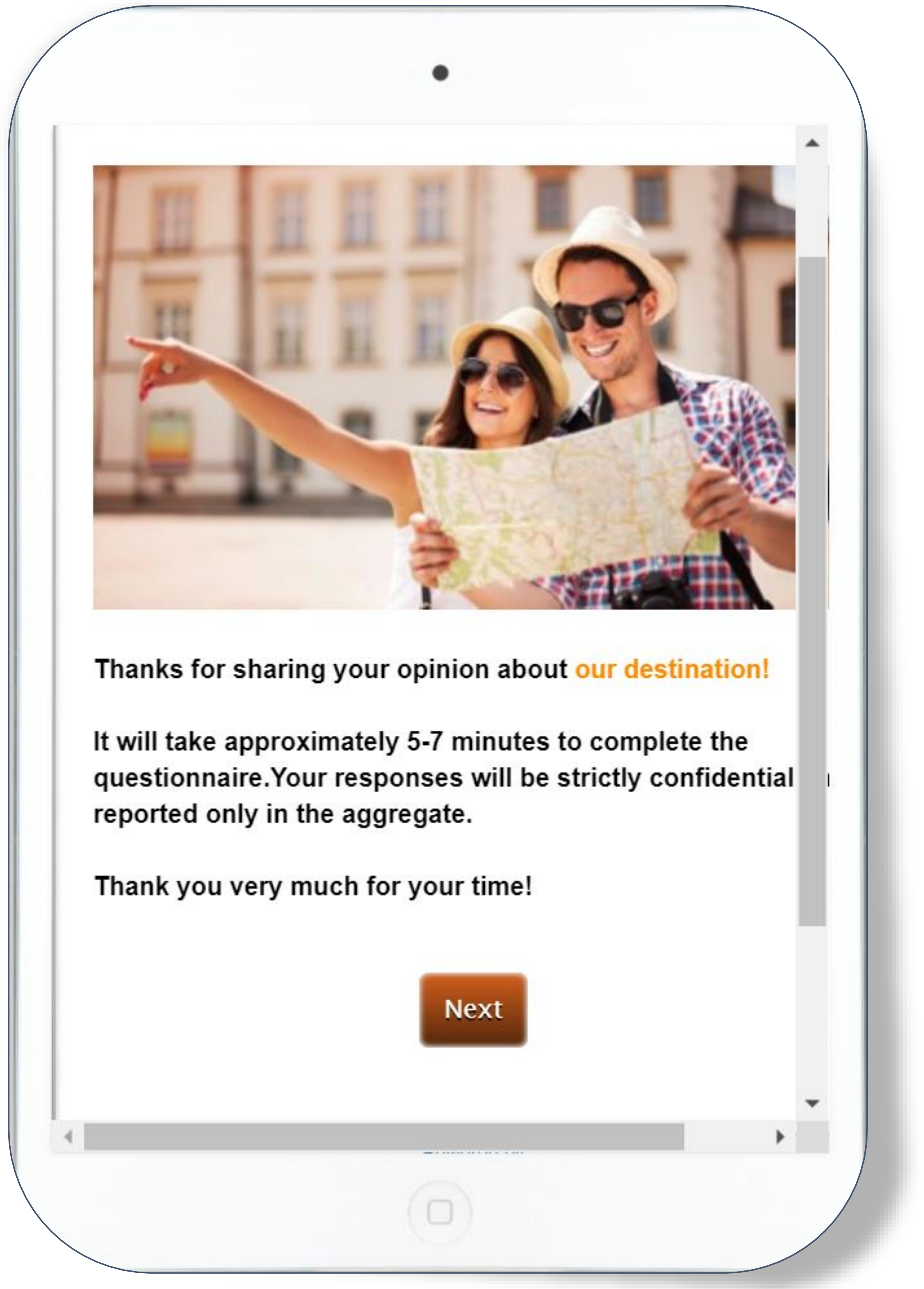
- Large quarterly screening of past 3 month visitors from national representative online access panels across 25+ markets worldwide
- Eligible respondents complete a destination post-visit rating, fueling the TRAVELSAT© benchmarking database
- Enriched by ad hoc targeted screening for specific destinations and markets

Recruitment at destination *(for local destinations)*

- Random face-to-face recruitment in tourist “hubs” (airports, attractions, visitor information centers…)
- Opt-ins collected for post-visit re-contact so to capture visitor sentiment once the full stay is completed

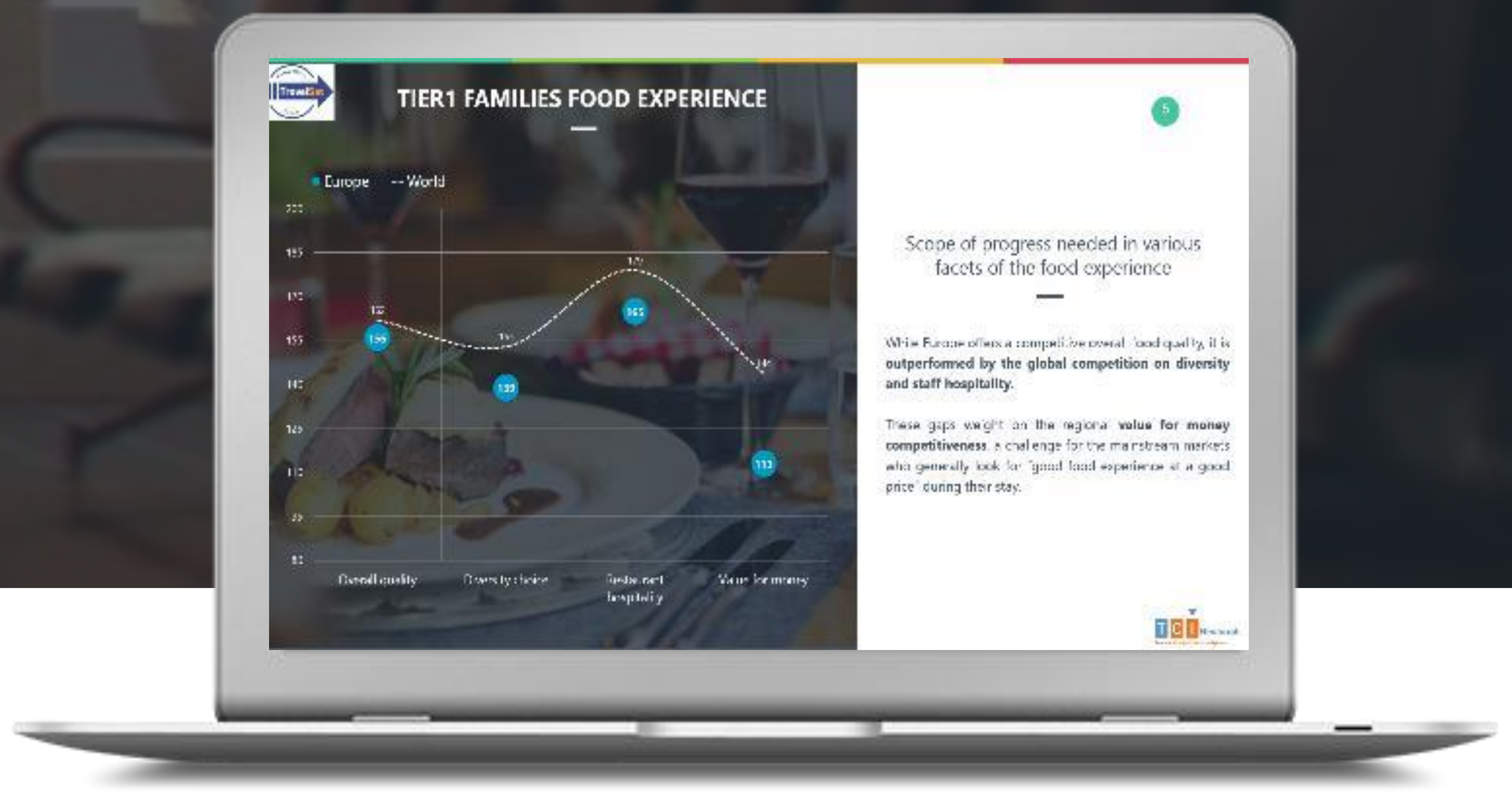
Standard multi-lingual online questionnaire

- A standard responsive questionnaire available in 10 languages (~10 minutes to complete)
- Directed to all respondents whatever the way they have been recruited
- Includes rating and trip / visitor profiling for segmentation purposes
- Ensures consistency and data comparability for all destinations and markets.



Custom Analysis Scope defined for INSETE

Key Definitions

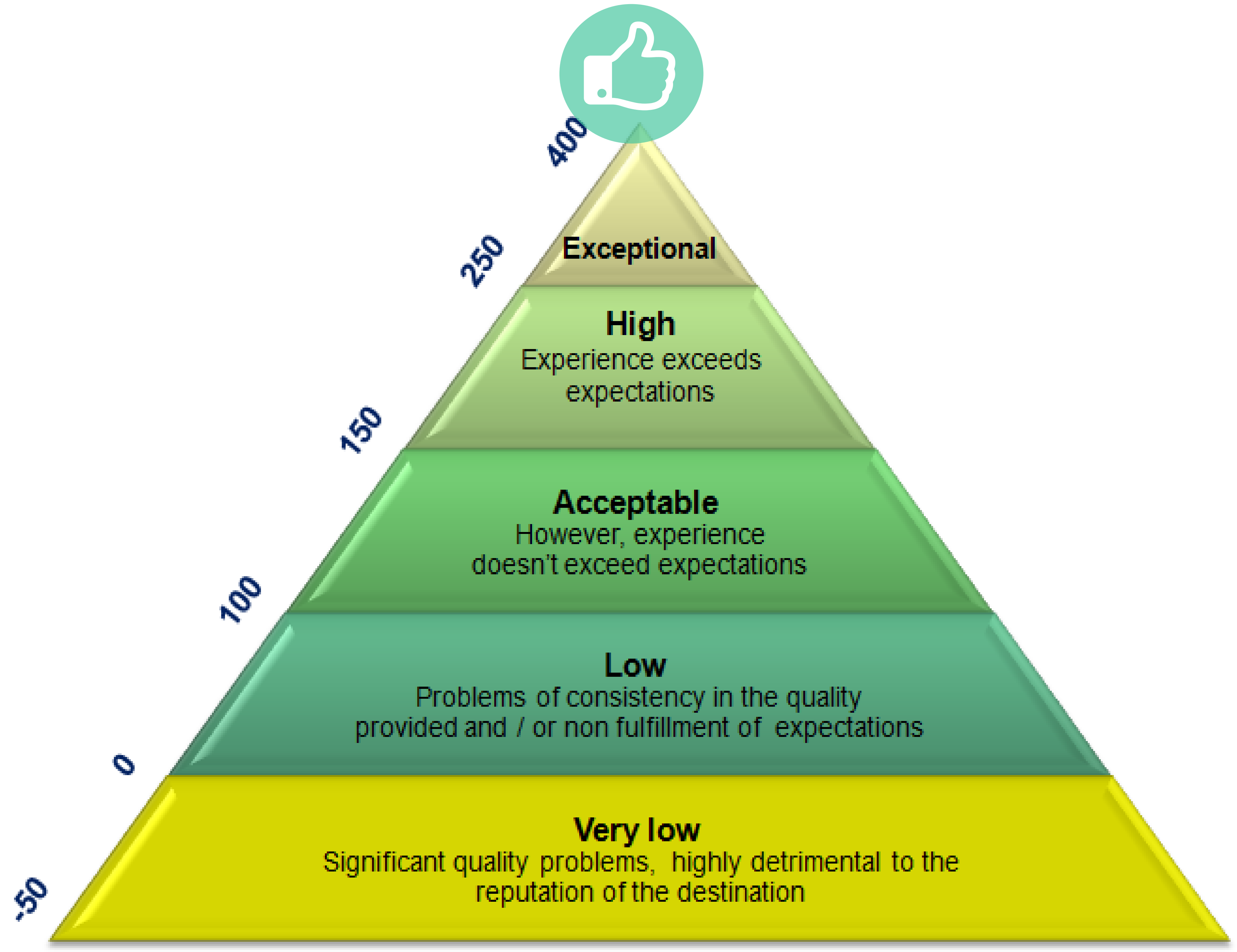


- **Target:** International visitors in Greece (at least 1 night at destination, all seasons, all markets)
- **Sample size:** 654 post-visit interviews among travelers in Greece (19% Athens, 50% Greek Islands, Northern Greece 25% and Peloponnesian 6%)
- **Data weighting** applied on markets' shares, based on INSETE reference statistics.
- **Travel period analyzed:** 2015-2017 (consolidated)
- **Comparison vs Southern EUROMED consolidated norm** *including: Spain, Portugal, Italy, Malta, Turkey and Croatia (6543 interviews)*
- **Additional competitive gap analysis on 2 specific segments:**
  - **Cultural visitors:** *visitors having historical sites and museums visits as primary activities during their stay*
  - **Foodies:** *visitors engaged in regular gastronomic activities during their stay*

TRAVELSAT© Index Definition

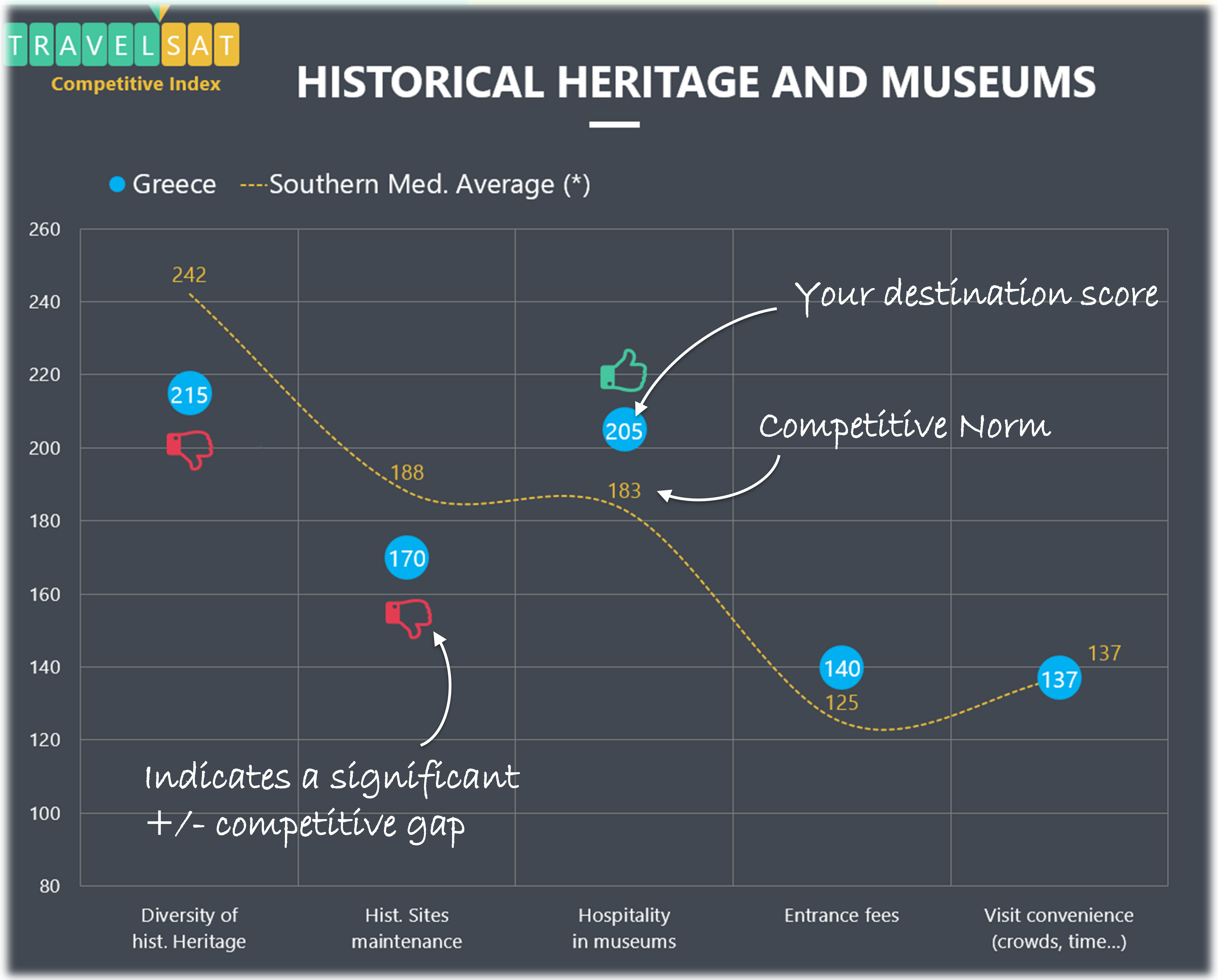
A benchmarking measurement

TRAVELSAT© is a **standard proprietary index** calculated from a 1 to 10 satisfaction rating scale. The index reflects the level satisfaction for each criteria and can fluctuates from -50 to 400. Scores from extremely satisfied or dissatisfied visitors (likely to greatly influence the destination reputation) are more valued in the scoring Vs arithmetic averages. **The primary purpose of Indexes is to benchmark destinations' experience quality Vs norms and competition**.



Indicative interpretation grid

How to read competitive dashboards?



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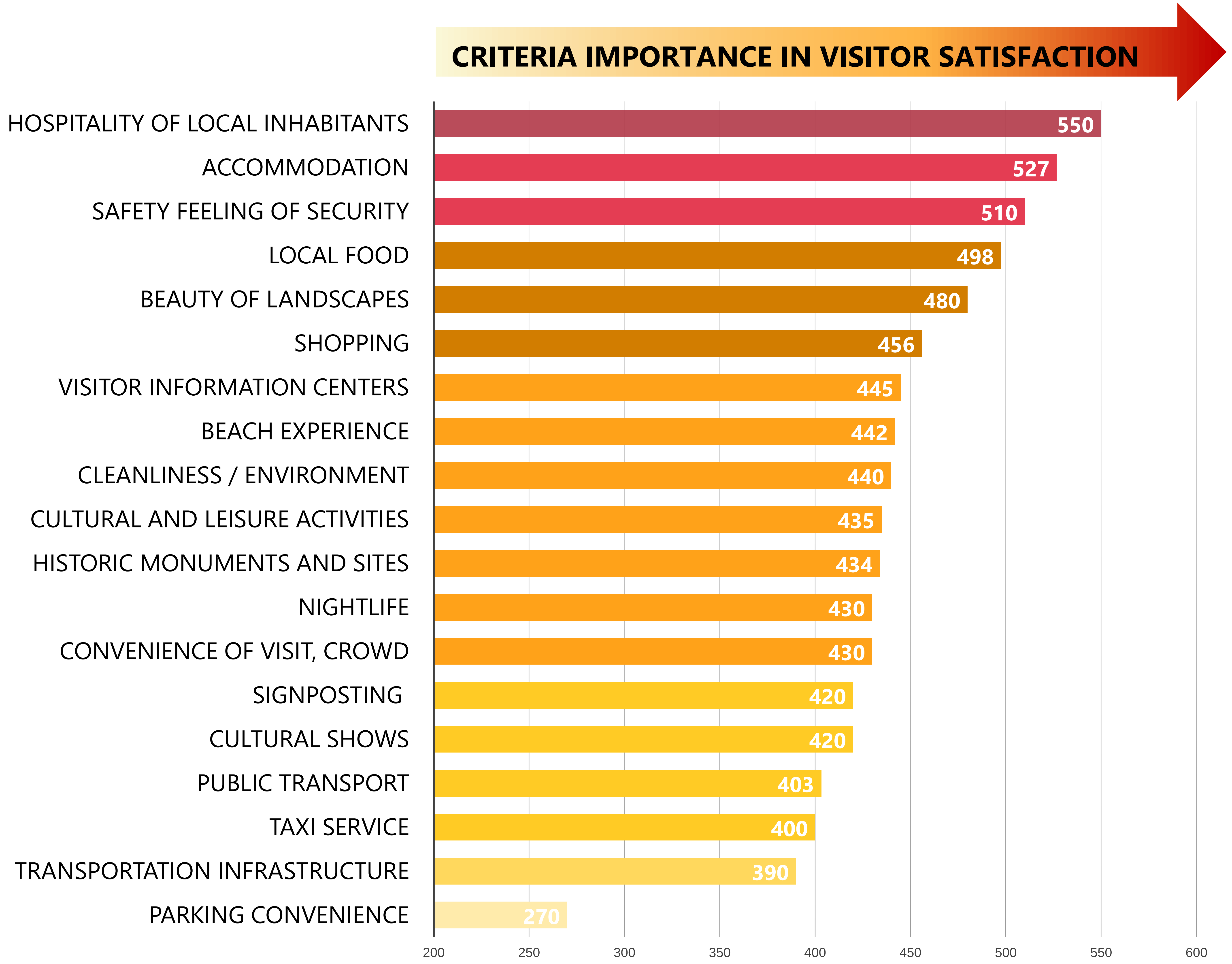
Results on the Visitor Journey

TRAVELSAT Competitive Index

What drive visitor experience in Southern European Destinations?

TOP Factors influencing visitors' experience quality

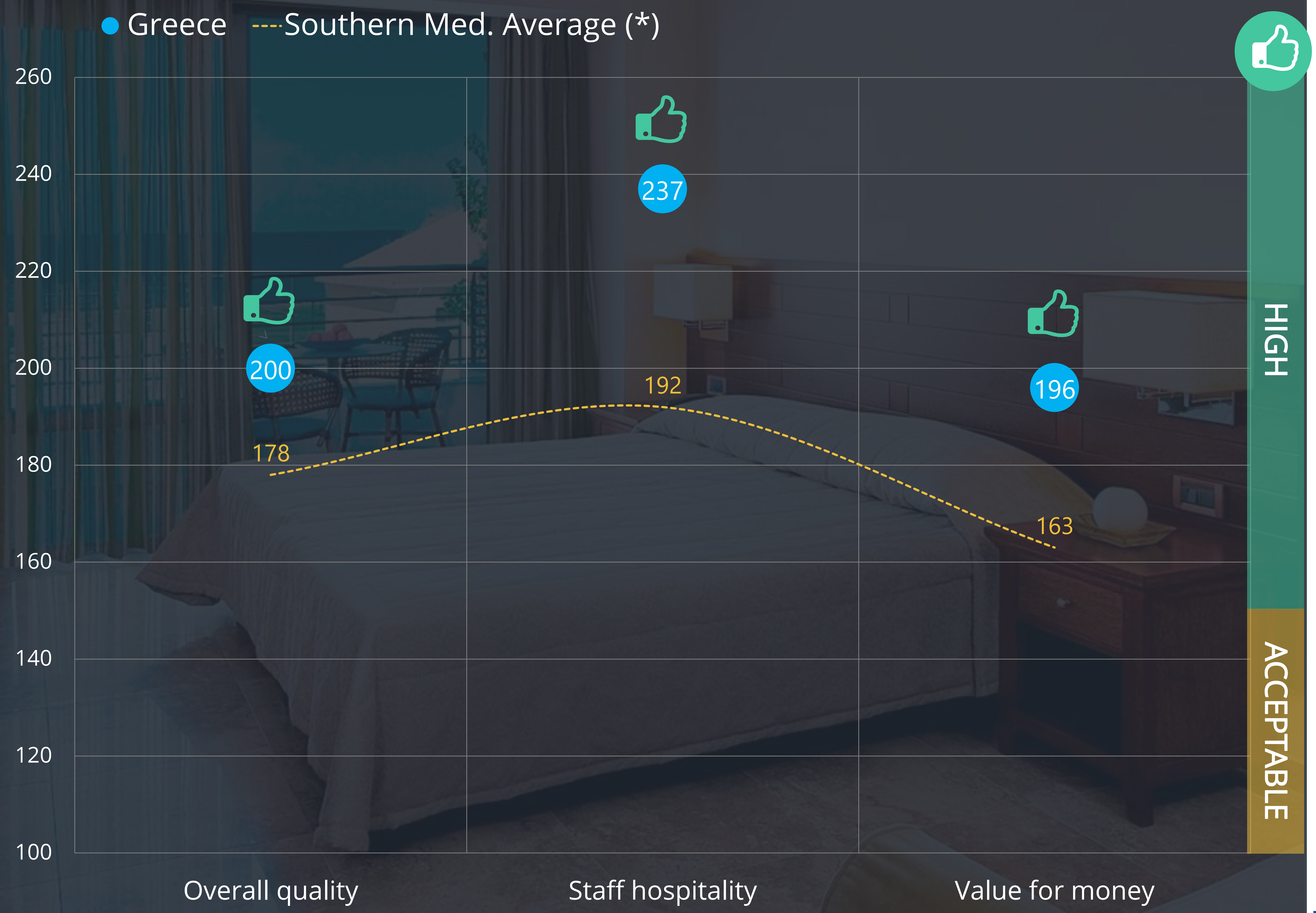


Source: TRAVELSAT 2012 / 2018. Correlation analysis – All markets – Southern Med destinations

Building visitor satisfaction at destination is more than ever **determined also by non commercial and intangible factors** (locals' hospitality, safety feeling, environment…).

However, in Southern Mediterranean destinations in particular, the **accommodation and food quality play a central role** in shaping the visitor experience, acting as a powerful "epicenter" in overall satisfaction.

ACCOMMODATION EXPERIENCE



(*) *Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia*

Greece significantly outperforms the competitive norm **on all facets of the accommodation experience**.

The excellent score achieved in terms of staff hospitality in particular helps building a **very favorable value or money perception.**

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FOOD EXPERIENCE

(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

The local food is confirmed to be **a clear competitive DNA of the destination!**

All aspects of the experience (quality, diversity, value, hospitality) surpass the competitive average, making Greece undoubtedly **a European champion on this important criteria.**

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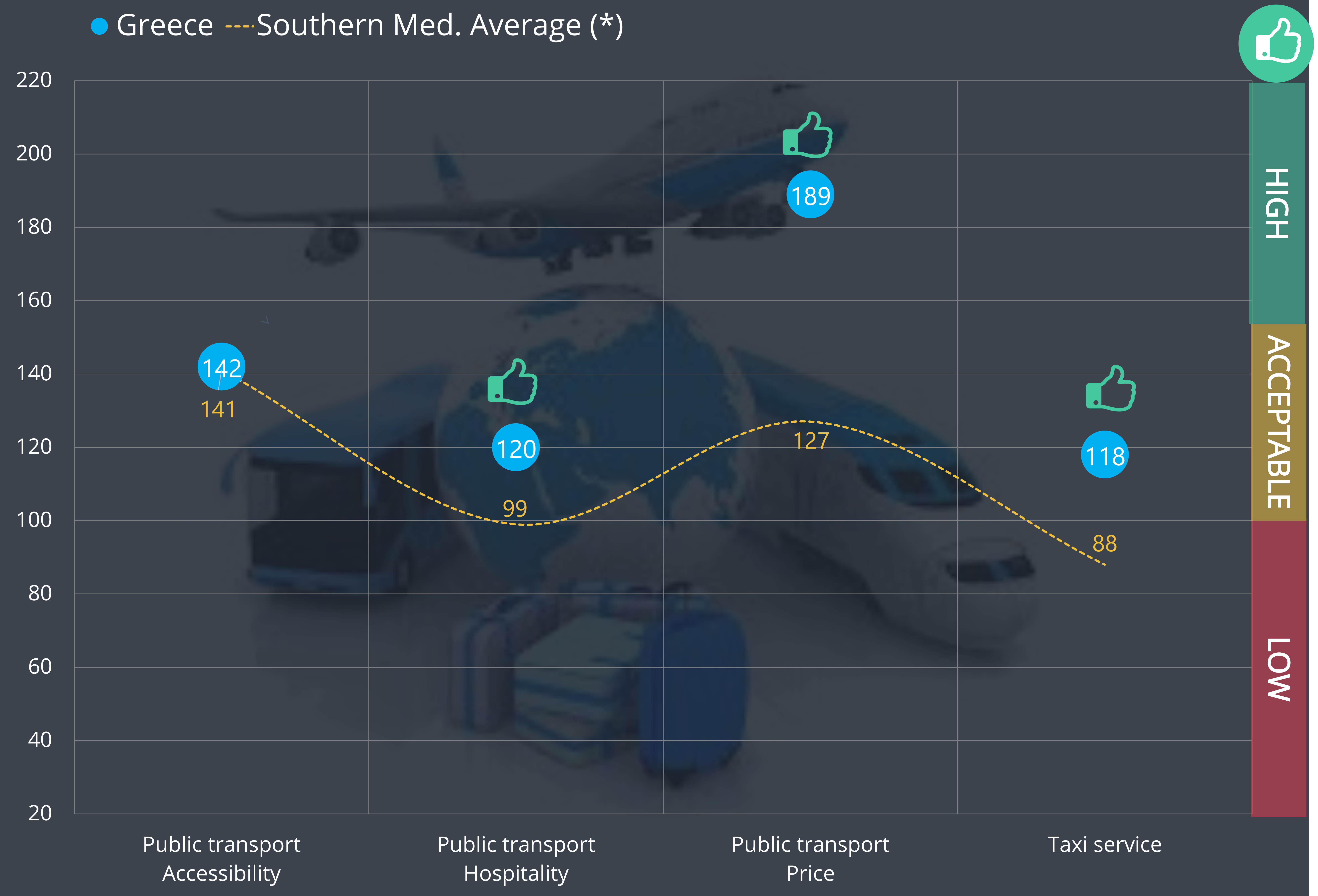
PUBLIC TRANSPORT & TAXI

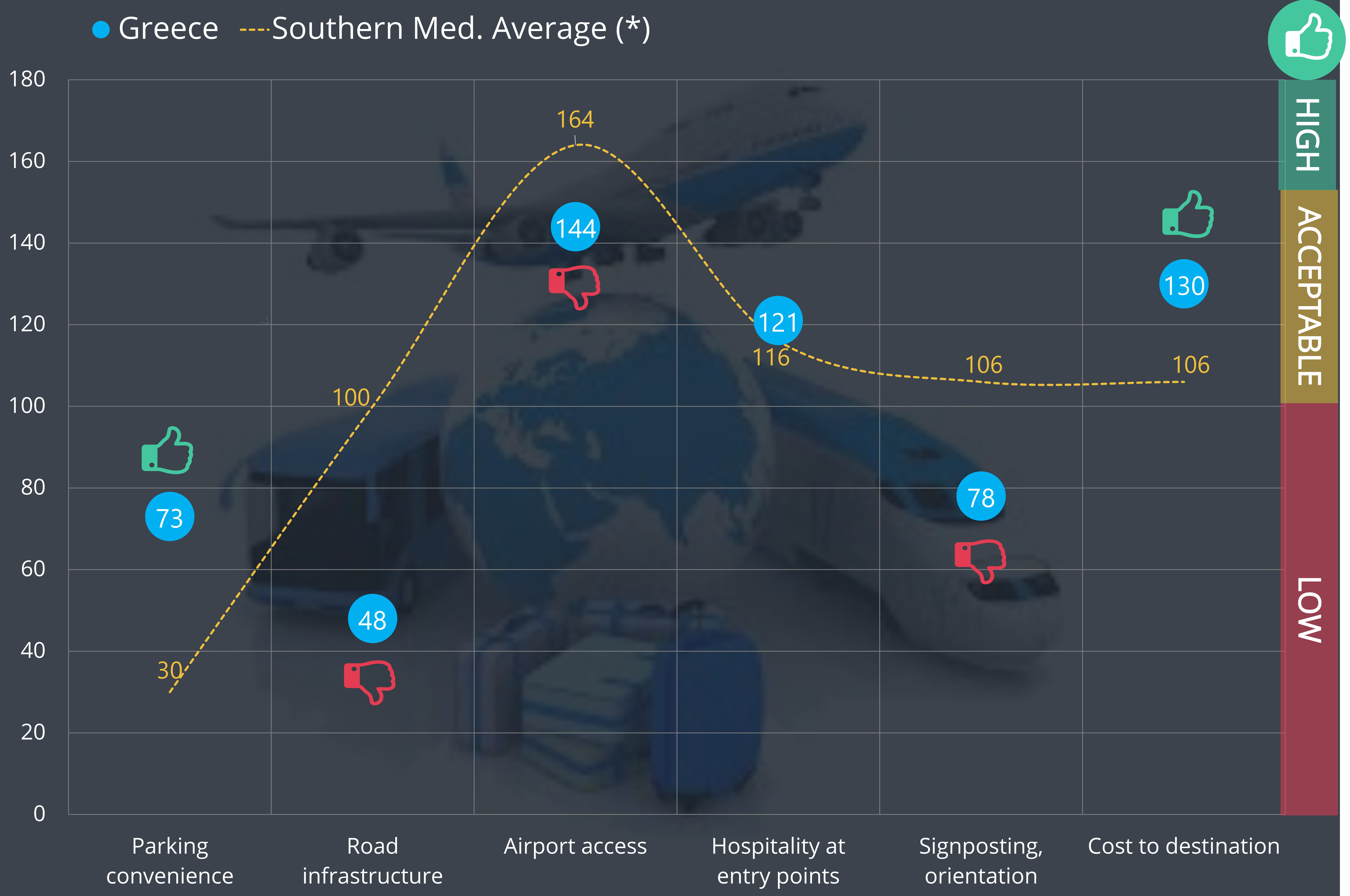


(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

In terms of public transportation, Greece distances itself from the competition with **positive levels of staff hospitality and prices,** while the general public transport accessibility reaches a comparable score vs Southern Med norm.

The **taxi service,** though lower rated, exceeds competition average.

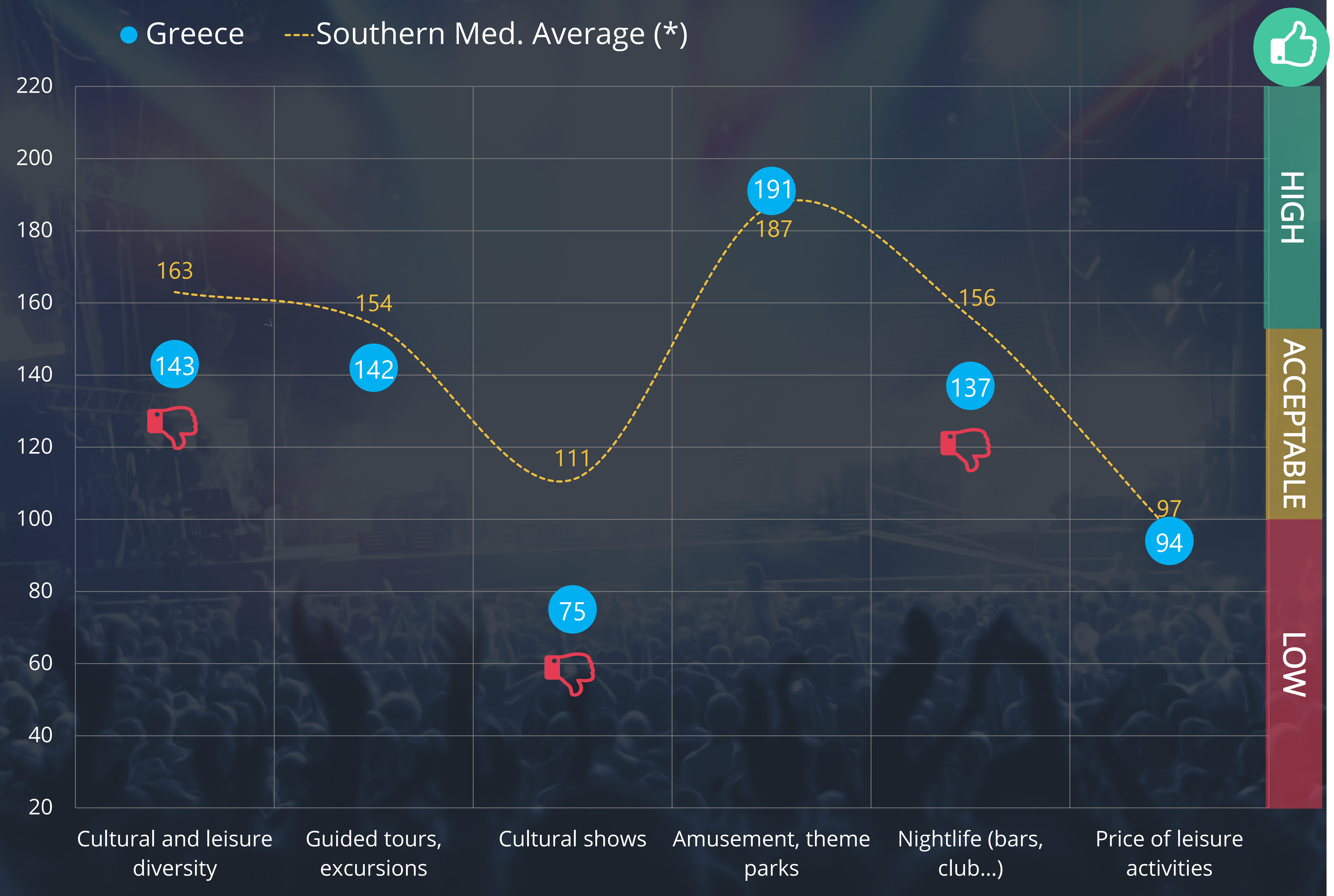
TRANSPORTATION INFRASTRUCTURE



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Other facets of the transportation experience offer more contrasted results: while the **parking convenience** and the **cost to reach the destination** are rated above the norms, the road infrastructure, airport access and signposting reach **lower-than-competition levels.**

CULTURAL AND LEISURE ACTIVITIES



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Visitor evaluations show some **competitive weaknesses with the leisure and cultural experience**: although guided tours & excursions, amusement/theme parks and prices of activities are in line with norms, satisfaction scores for **evening and night activities** tend to be **surpassed by the competition.**

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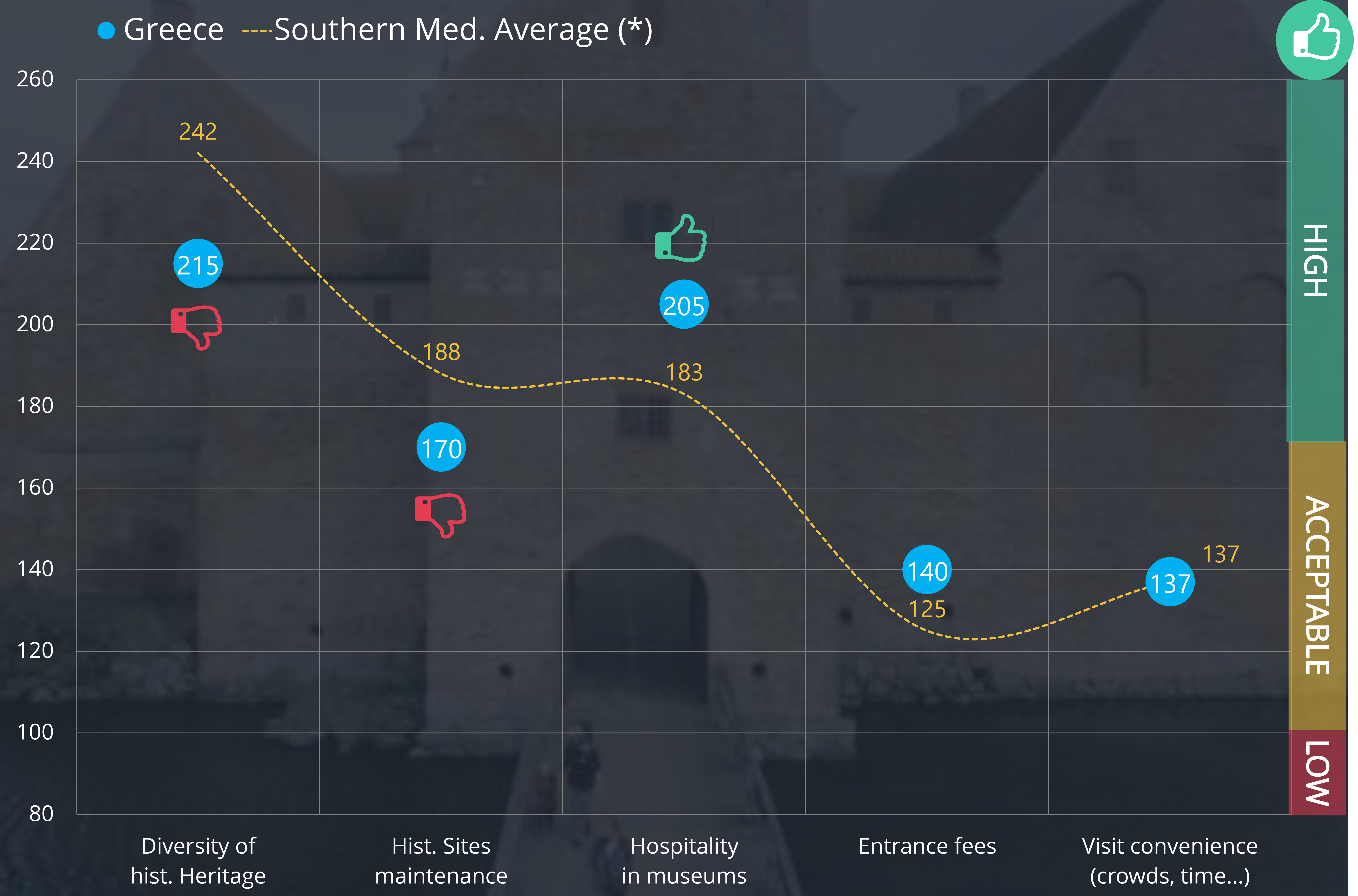
HISTORICAL HERITAGE AND MUSEUMS



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Despite the presence of world-renowned and iconic historical attractions, Greece (in general) is **less favorably rated than average competition** for the **diversity** and **maintenance** of its historical sites.

Price perceptions, staff **hospitality** and **convenience** for visiting achieve however **competitive scores**.

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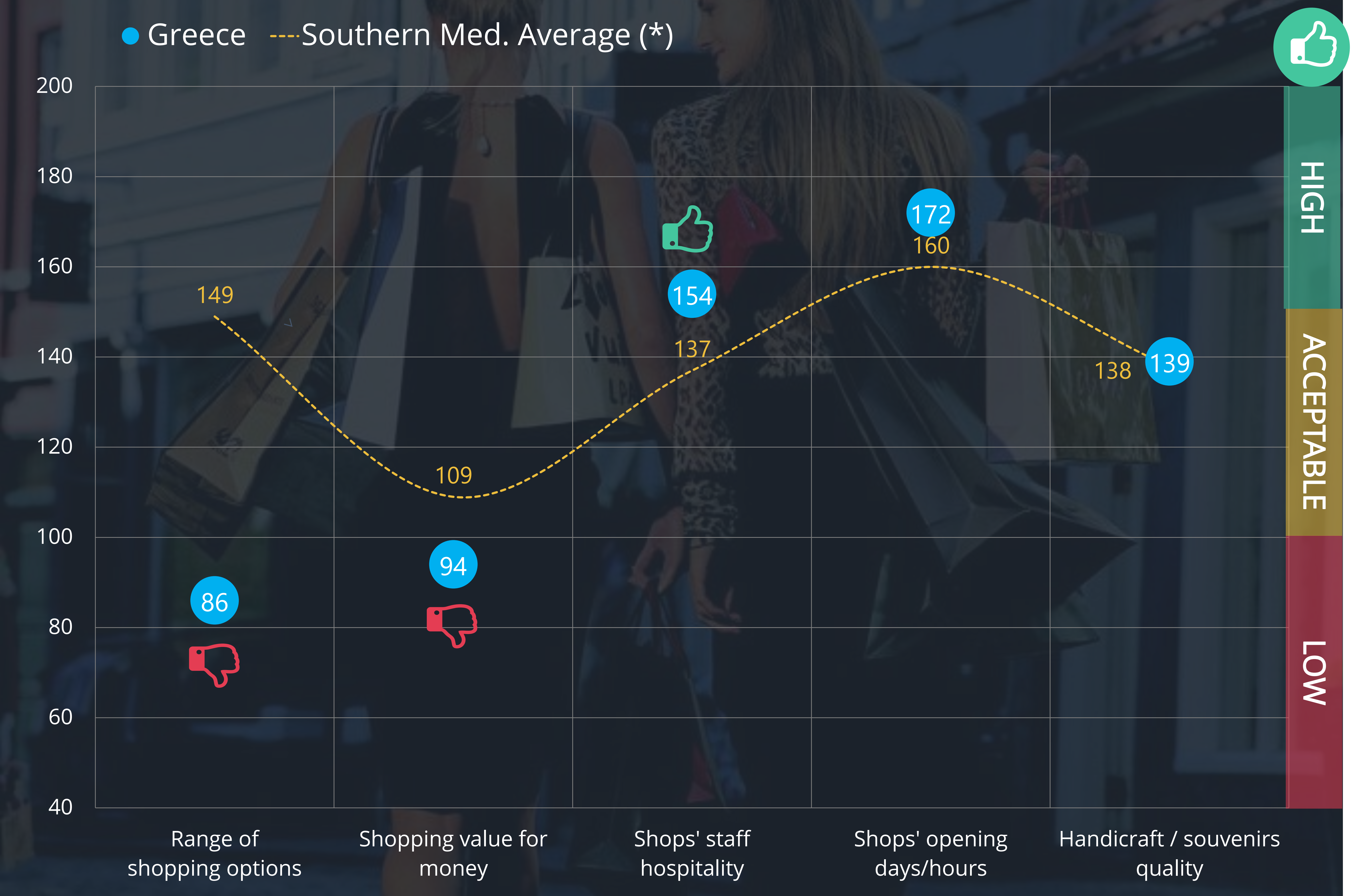
SHOPPING EXPERIENCE



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Greece offers a competitive experience of a typical Mediterranean **"hospitable shopping of handicrafts & souvenirs at all time**".

The destination **underperforms** however with the shopping **range of options** and (to a lesser extend) with the overall shopping **value for money perceptions.**

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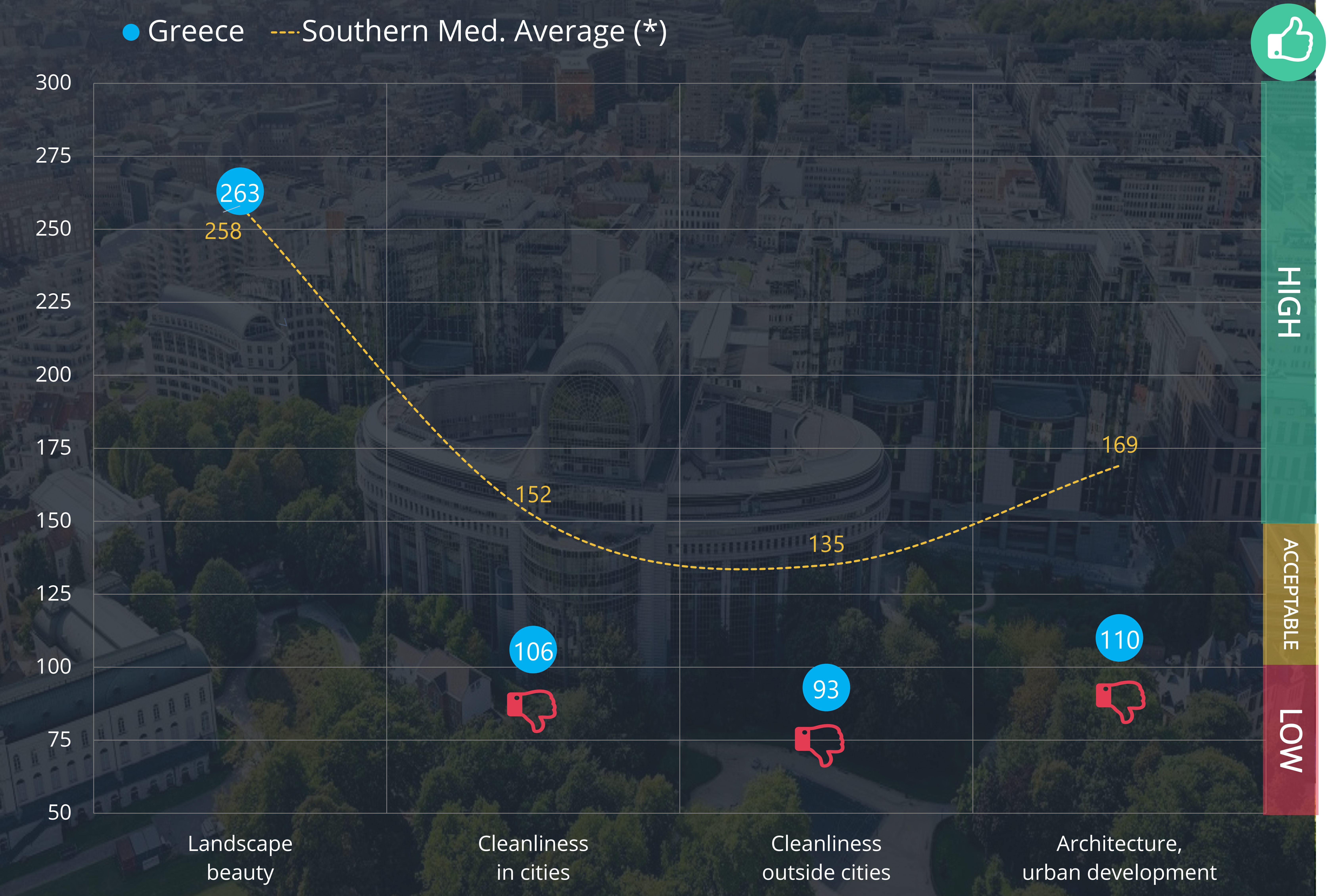
ENVIRONMENT



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Greece equally excels with the Southern Med norm for the landscape beauty but visitors express lower satisfaction **with architectural and urban development** as well as for the **cleanliness,** both in the city streets and outside cities.

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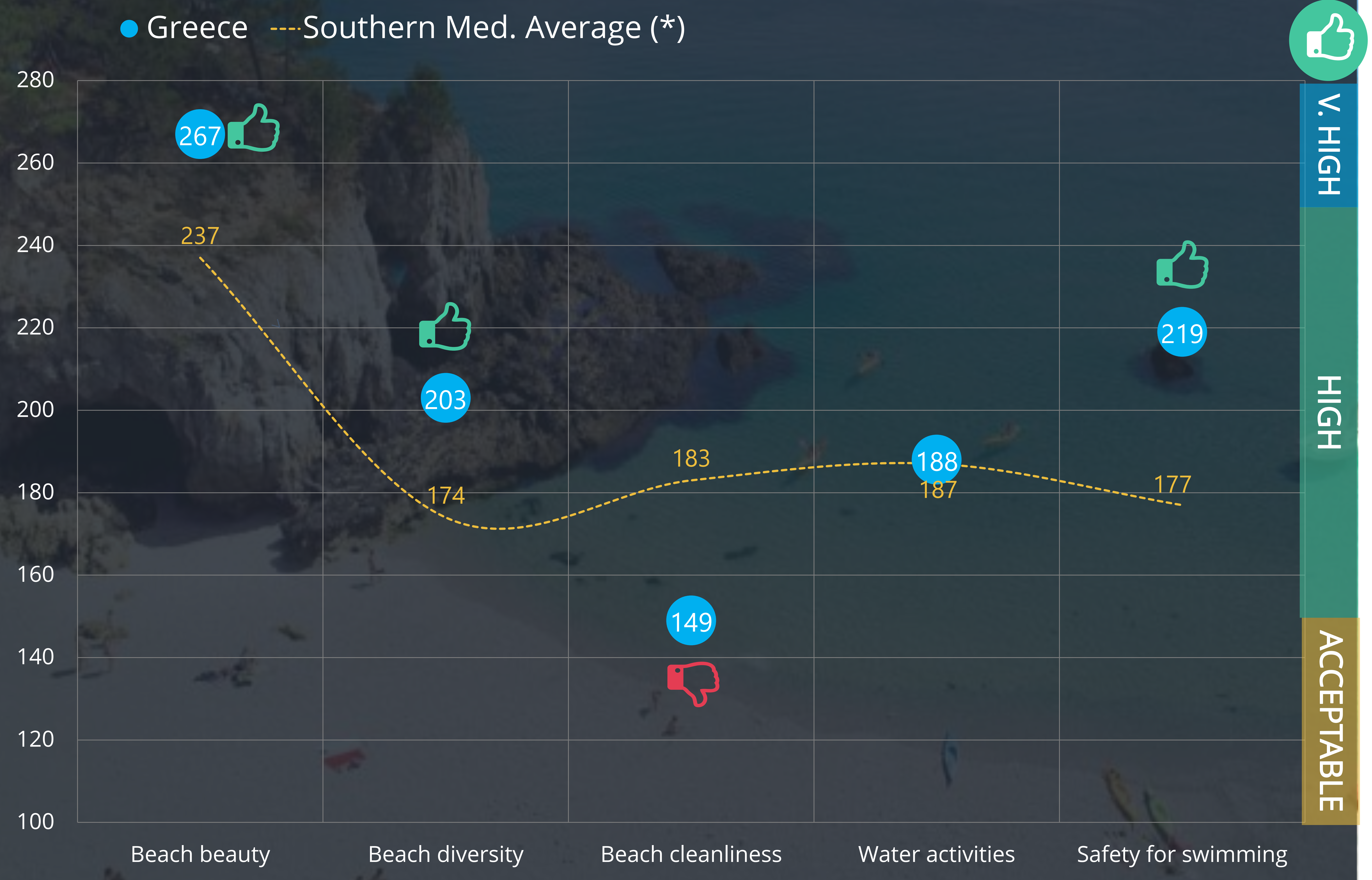
BEACH EXPERIENCE



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Greece enjoys a **very strong competitive position for the beach experience,** particularly well rated for their beauty, diversity and offering **great safety for swimming.**

The average competition, however, tends to offer **perceptions of cleaner beaches.**

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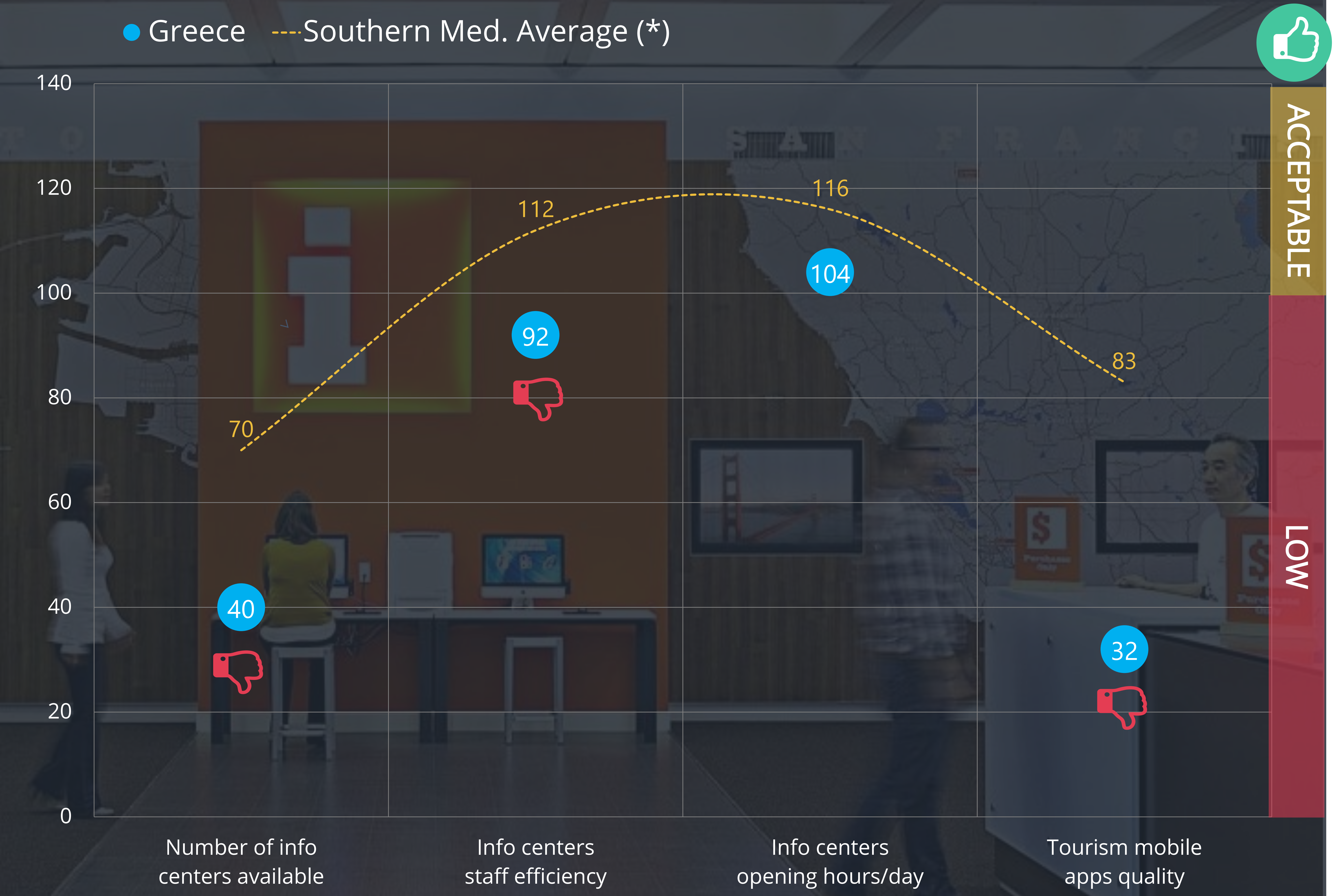
VISITOR INFORMATION & ASSISTANCE



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

While hospitality at entry points (airports, ports…) is rated in line with norm *(see section "transportation experience")*, the **overall visitor assistance along the stay** (physical or digital) does not reach competitive levels.

This weakness may limit the most explorer / cultural-minded visitors to enjoy all what the destination can offer during their stay.

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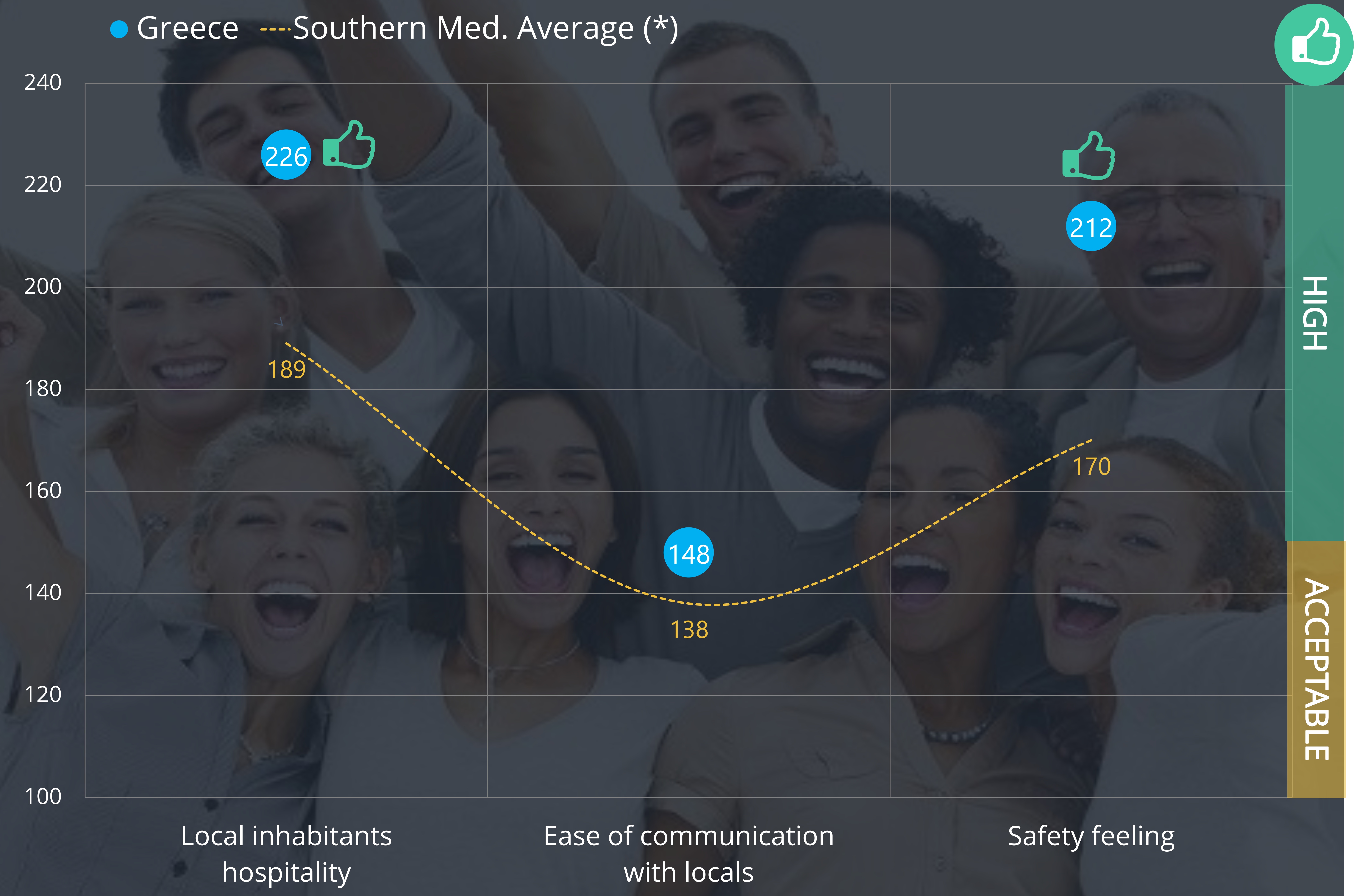
LOCAL HOSPITALITY, SAFETY FEELING



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

The **local inhabitants' hospitality** and the **feeling of security** –two highly influential pillars of the visitor experience- are both clear **competitive assets for Greece**!

The **ease of communication** is also rated in line with the norm, showing no (or manageable) language barriers.

Transverse Analysis

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Key Competitive Indexes

	Overall fullfilment of expectations	Overall stay value for money	Intention to recommend (net %)	Intention to repeat visit (net %)
GREECE	207	192	70%	36%
Southern Med. Average (*)	*188*	*171*	*70%*	*46%*

(*) Southern / Med: Spain, Portugal, Italy, Malta, Turkey, Greece, Croatia

Greece generates **high and competitive levels of overall satisfaction and value for money during the stay**. The net share of post-visit ambassadors is also in line with the competition. One **possible challenge though in the long-term** concerns the lower-than-competition **repeat visit intention:** this should encourage Greece tourism players to generate more loyalty and "reasons to come back", while travelers are exposed to an increasing number of destinations' choices in and outside the region…

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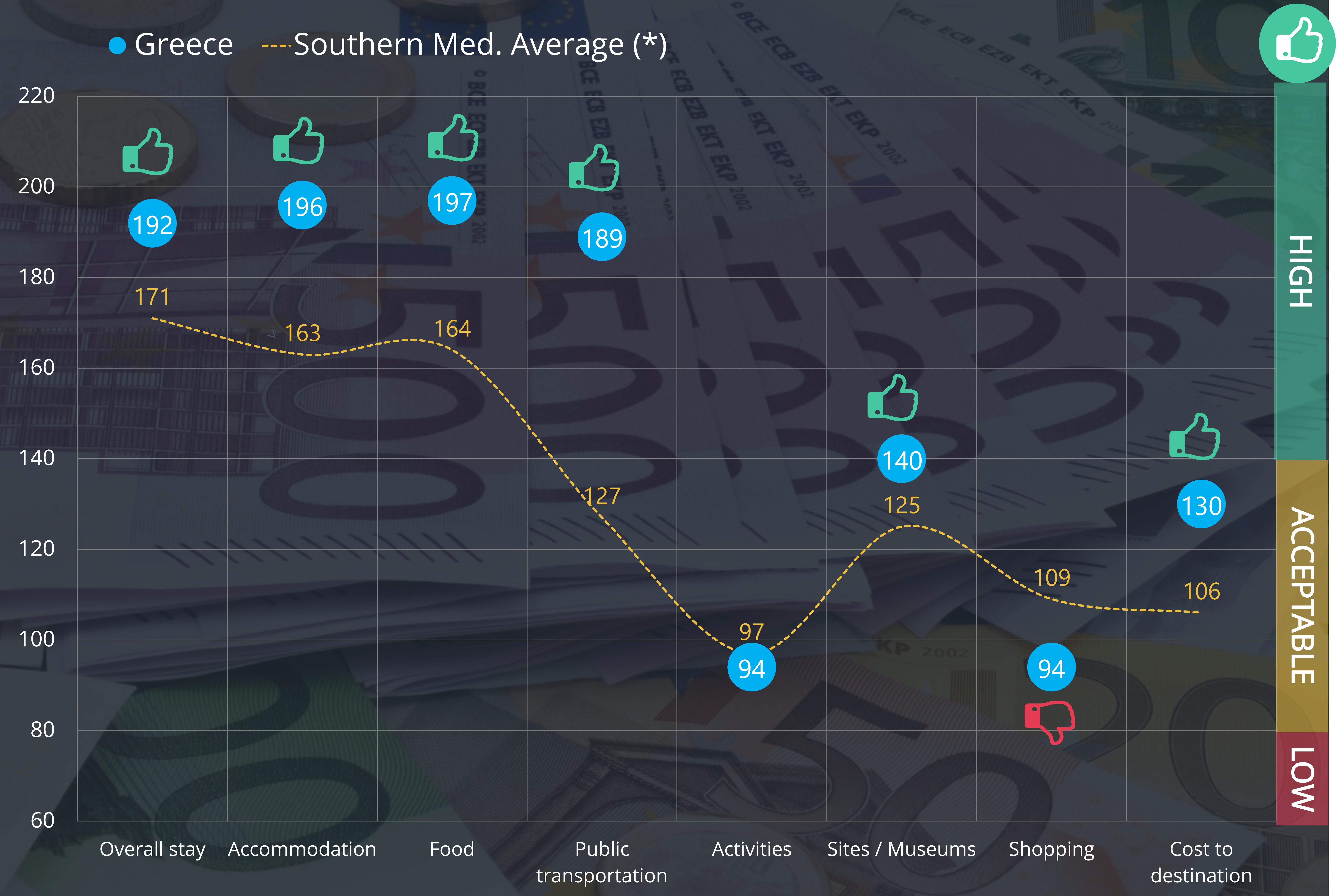
PRICE / VALUE FOR MONEY CHAIN



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Greece **performs particularly well on price and value for money dimensions,** the value chain being only somewhat "broken" for the shopping experience.

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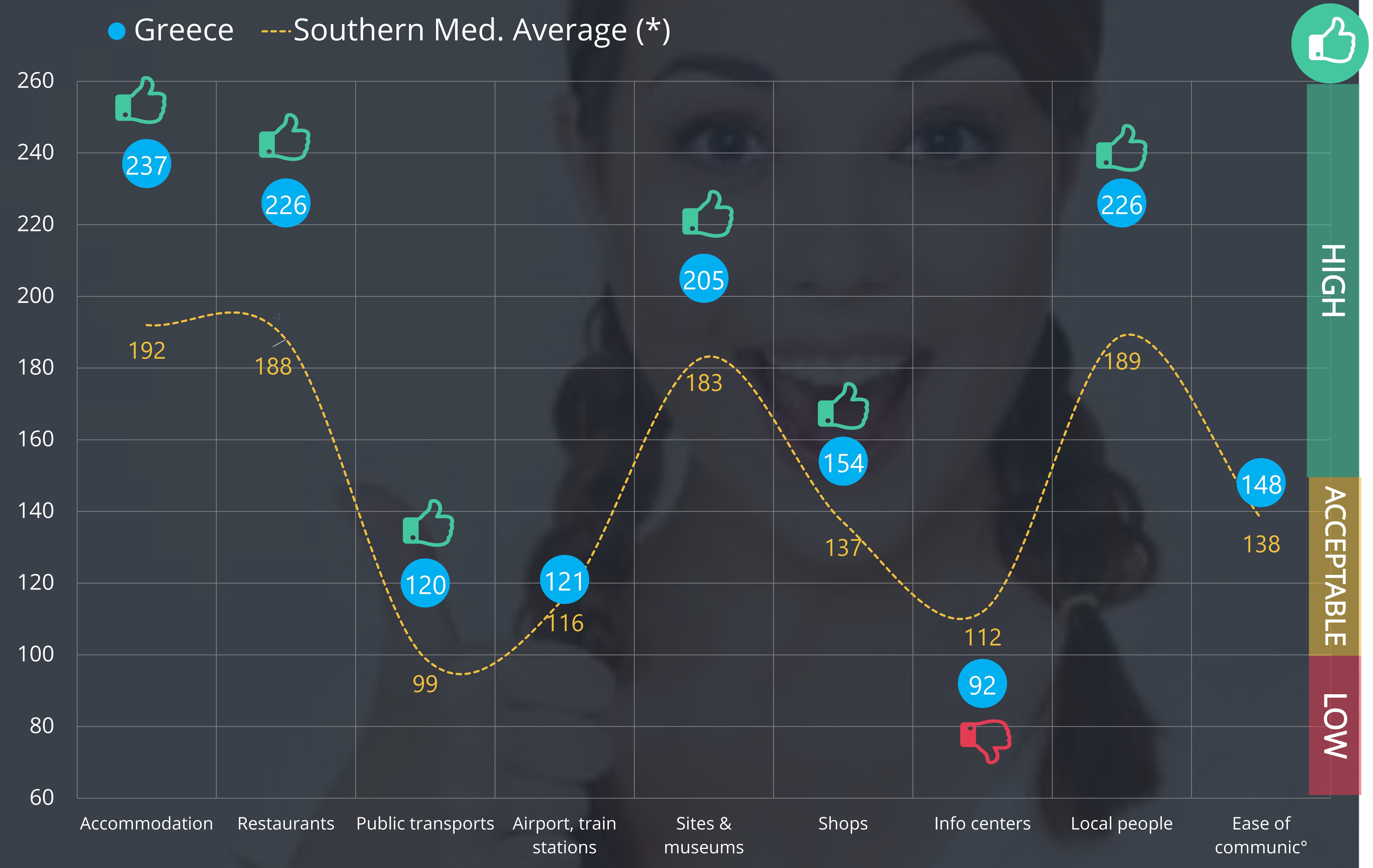
PERSONAL CONTACT CHAIN



(*) Southern Euromed: Spain, Portugal, Italy, Malta, Turkey, Croatia

Personal hospitality delivered by both locals and professionals is a **strong asset for the destination** at almost all steps of the visit.

Only information centers' staff efficiency are slightly under-rated vs norm.

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Competitive Gaps - Summary

The Greece Brand Experience Competitive Matrix

Analysis taking account of the competitive situation and the relative importance of each dimensions

Strengths

Competitive advantage on important factors

- Accommodation experience
- Food experience
- Hospitality of locals at most steps of the stay
- Safety feeling

Whatchlist

To be monitored

- Architecture, urbanization development
- Diversity / maintenance of museums and hist. sites
- Road infrastructure, airport access
- Signposting

S W O T

Opportunities

of differentiation

- Beach safety for swimming
- Museum and historical sites fees
- Public transportation hospitality and price
- Parking convenience

Threats

Low competitiveness on important factors

- Cleanliness (streets, outside cities and at beaches)
- Evening activities
- Shopping diversity and value for money
- Visitor information centers and digital assistance

Dashboards per Segment

A segment-based competitive analysis measures how Greece over/under performs vs competitive norms for the same given segment. Therefore, this benchmarking exercise does not measure areas of satisfaction or dissatisfaction in absolute values, but areas of competitiveness and reversely, facets of experience where actions should be taken to remain competitive.

Cultural visitors: *visitors having historical sites and museums visits as primary activities during their stay*

Segment incidence: 27% of total visitors

Foodies: *visitors engaged in regular gastronomic activities during their stay*

Segment incidence: 19% of total visitors

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Cultural visitors – Greece vs Southern European Average

Visitors who regularly visited museums, churches, castles, heritage sites and monuments during their stay, as primary activities.

Significant Gaps vs competitive norms (*)

OVERALL SENTIMENT

Overall satisfaction	-
Overall value for money	-
Recommendation	-
Repeat visit intention	-27%

HISTORICAL HERITAGE

Maintenance	- 18
Entrance fees	+ 42

CULTUR. & LEISURE ACTIV.

Diversity	- 33
Nightlife	- 31

TRANSPORTATION

Price of public trans.	+ 58
Taxi service	+ 31
Cost to destination	+ 32

ACCOMMODATION / FOOD

Accommodation value for money	+ 23
Restaurant Hospitality	+ 25

SHOPPING

Range of shopping options	- 55

ENVIRONMENT

Cleanliness of public areas	- 38
Cleanliness outside cities	- 34
Urban development / architecture	- 81

VISITOR ASSISTANCE

Number of centers available	- 34
Efficiency of personnel	- 29
Mobile apps for tourists	- 28

LOCAL PEOPLE

Ease of communication with locals	- 39

Compared to average competition, Greece offers a **well rated experience** to its cultural visitors for several important aspects including **hospitality and mobility**. However, while museums and sites prices are well rated, other facets of the **visitor assistance and "sense of place" are better managed by the competition** (environment/cleanliness in general and maintenance of sites).

Moreover, at a time travelers are looking for "blending" experiences, the **"cultural+shopping" experience** may not fully rival what the competition can offer. This may partly explain the gap in visit repeat intention compared to norms.

(*) Southern / Med: Spain, Portugal, Italy, Malta, Turkey, Greece, Croatia

TRAVELSAT Competitive Index

Foodies visitors – Greece vs Southern European Average

Visitors engaged in regular gastronomic activities during their stay.

Significant Gaps vs competitive norms (*)

OVERALL SENTIMENT

Overall satisfaction	+ 37
Overall value for money	+ 48
Recommendation	-
Repeat visit intention	-

LOCAL FOOD

Quality	+ 30
Diversity	+ 27
Hospitality	+ 30
Value for money	+ 29

CULT. & LEISURE ACTIV.

Price of leisure activities	+ 31

SHOPPING

Diversity	- 37
Value for money	-25
Hospitality	+ 38
Opening hours/days	+ 45

ACCOMMODATION

Quality	+ 43
Hospitality	+ 93
Value for money	+ 67

HISTORICAL HERITAGE

Entrance prices	+ 48

TRANSPORTATION

Hospitality in public tr.	+ 33
Price of public transport	+ 64
Taxi service	+ 49
Signposting	- 36
Cost to reach destination	+ 50

ENVIRONMENT

Beauty of landscape	+ 38
Urban development / architecture	- 40

VISITOR ASSISTANCE

Opening hours/days	+ 47
Mobile apps for tourists	- 37

BEACHES

Beach beauty	+ 51
Diversity	+ 68
Water activities	+ 38
Safety for swimming	+ 74

LOCALS & SAFETY

Hospitality of locals	+ 84
Safety feeling, security	+ 65

Compared to average competition, **Greece absolutely delights the coveted growing foodies segment** with a solid experience combining local food *diversity, quality, value and hospitality*.

The **combination** with **other competitive elements of the stay** (accommodation, beaches and landscape, safety and locals' hospitality, transportation…) **makes Greece a European champion on Foodies,** able to provide high levels of satisfaction and value for money perceptions for most facets for the stay.

(*) Southern / Med: Spain, Portugal, Italy, Malta, Turkey, Greece, Croatia

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Take-aways

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Key learning

What competitive data are telling us

A competitive experience on essential pillars, yet some issues to address for fully rivalling the competition




Greece offers a **very attractive and competitive visitor experience** on some **essential pillars of satisfaction**, including key facets of **hospitality** (accommodation and food) and **convenience/context for visiting** (safety, easy and affordable transportation, locals' attitude). The **beach experience** is confirmed to be a great competitive asset too. These solid performances in both **personal contact** and **price perceptions chains** (rare in Europe!) fuel a highly competitive **destination value for money position.**

However, other tangible and intangible facets of the experience –though satisfying- **do not rival competitive norms**, stopping some visitors to convert into fully active ambassadors (cultural visitors in particular!):

- The **diversity of activities** (shopping range, cultural and leisure activities, museums and historical sites) with a gap for **post 7pm experiences** (*note: actions taken here must not disturb local communities and other visitors given the growing overtourism sensitive context in Europe*…);
- **Visitor assistance,** either physical or digital (info centers and digital apps for visitors)
- The **architecture/urbanization**, creating itineraries that make visitors discover hidden architectural gems and avoiding unpleasant urban areas while approaching attractions and sites:
- The **cleanliness**, whether it is in the urban public spaces, outside cities or at the beach;
- The **road infrastructure**, **access to airports** and **signposting.**

Increasing post-visit recommendation (achieving the demanding "waouu effect") can also be triggered by **offering more blended and innovative experiences across the country**, capitalizing on existing competitive assets mentioned above, bringing for example culture in food places and hotels, creating pop-up temporary sustainable events staged in beautiful landscapes or beaches, handicrafts & foods experiences in ephemeral places… **Foodies visitors**, in this context, may certainly be a excellent segment to leverage on for building new innovative blended experience.

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TCI Research is an independent UNWTO-Awarded market intelligence agency leading in international tourism and travel competitive analysis. It provides public and private players of the visitor economy with innovative research solutions and insights combining conventional surveys with controlled Big Data analysis covering the whole visitor journey.

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Ευρωπαϊκή Ένωση
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Επιχειρησιακό Πρόγραμμα
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Με τη συγχρηματοδότηση της Ελλάδας και της Ευρωπαϊκής Ένωσης

ΕΣΠΑ 2014-2020
ανάπτυξη - εργασία - αλληλεγγύη

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