



Using Big Data to analyse loyalty to & competing destinations

INSETE

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Actively supporting development of tourism in Greece

INSETE

- 1. Improving Professional Training and Development
- 2. Documentation and development of policy papers
- 3. Supporting Human Resource development

MARKETING GREECE

- 1. Design and development of tourism products and destinations
- 2. Communication & Marketing of Greek tourism product
- 3. Digital campaigns
- 4. Targeted publicity and promotion
- 5. Opening up new markets with new communication channels























Perceptions vs Reality

Regarding *loyalty* and *competition*

Data Set – Key Concepts

- Analysis of searches of destinations keyed in directly by the consumers from online data from OTAs and TOs, as well as a small amount (5%) of meta-searches and airline searches.
- 1 billion searches from 42 million users and 13 main source markets of Greece
- Searches for 10 Greek Destinations and 13 competitor destinations
- Period: March May 2018
- Loyalty Index: % of those who searched only for destination
- Competition: what % of those who searched for a particular destination, searched for another destination as well

Loyalty index to Greek destinations - users

Market	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Loyalty per Market
Austria	44%	67%	45%	47%	49%	61%	50%	85%	60%	40%	54%
Denmark	40%	52%	45%	40%	46%	40%	54%	33%	44%	43%	47%
France	44%	30%	51%	36%	46%	36%	39%	72%	40%	65%	43%
Germany	45%	49%	50%	33%	45%	48%	46%	48%	45%	43%	45%
Italy	39%	38%	70%	40%	36%	42%	42%	40%	40%	40%	40%
Netherlands	40%	66%	33%	47%	86%	51%	40%	68%	57%	42%	55%
Norway	49%	13%	47%	47%	51%	18%	54%	33%	47%	48%	43%
Russia	46%	61%	42%	69%	44%	54%	42%	57%	64%	48%	53%
Spain	48%	47%	44%	48%	53%	48%	49%	50%	48%	63%	48%
Sweden	44%	48%	46%	53%	58%	54%	42%	49%	62%	56%	50%
Switzerland	43%	69%	75%	55%	61%	49%	44%	55%	61%	59%	51%
UK	46%	47%	59%	44%	52%	46%	77%	48%	67%	48%	53%
US	49%	43%	97%	46%	95%	61%	94%	58%	90%	96%	72%
Average per Destination	44%	48%	54%	46%	56%	47%	52%	54%	56%	53%	-

- Loyalty varies considerably by destination and source market
- Athens is a connection point for many other destinations

Loyalty index to Greek destinations - searches

Market	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Loyalty per Market
Austria	26%	17%	1%	11%	5%	16%	6%	10%	15%	3%	7%
Denmark	15%	19%	1%	5%	3%	23%	13%	42%	11%	15%	8%
France	19%	5%	4%	8%	4%	7%	5%	23%	6%	5%	8%
Germany	19%	8%	11%	3%	7%	5%	7%	5%	9%	4%	7%
Italy	17%	8%	5%	9%	6%	10%	9%	12%	9%	9%	10%
Netherlands	21%	12%	0%	6%	6%	7%	2%	4%	2%	2%	4%
Norway	33%	5%	13%	8%	11%	6%	22%	4%	13%	6%	15%
Russia	12%	28%	8%	31%	6%	14%	15%	17%	29%	6%	17%
Spain	16%	6%	4%	8%	10%	6%	7%	16%	7%	13%	11%
Sweden	32%	17%	5%	18%	10%	13%	15%	7%	30%	23%	20%
Switzerland	13%	16%	5%	8%	8%	6%	5%	6%	11%	4%	6%
UK	34%	17%	16%	15%	10%	14%	32%	21%	26%	16%	22%
US	7%	6%	12%	6%	26%	23%	19%	29%	39%	50%	17%
Average per Destination	20%	13%	7%	11%	9%	12%	12%	15%	16%	12%	-

- Loyalty by searches is considerably lower
- Loyal travelers do not do as much search for the destination as non-loyal travelers do
- Also have a different pattern (e.g. see ATH) destination

Top-10 of international Competition to Greece - users

what % of those who searched for a Greek destination searched also for an international destination

Mallorca	7%
Tenerife	3%
Barcelona	3%
Paris	3%
Fuerteventura	3%
Gran Canaria	3%
Ibiza	2%
Valletta	2%
Rome	2%
Marrakesh	2%

- With exception of Mallorca, all %s are very low at destination level
- Spanish destinations and in particular the
 Balearics and the Canaries are the international competition to Greece
- No Turkish destination in top-10
- Paris and Rome in top-10
- Marrakesh in No. 10 position

Overall Competition to Greece - users

what % of those who searched for a Greek destination searched also for another destination

Mallorca	7%
Corfu	4%
Fira	4%
Heraklion	4%
Rhodes	3%
Athens	3%
Tenerife	3%
Barcelona	3%
Paris	3%
Fuerteventura	3%
Gran Canaria	3%
Ibiza	2%
Mykonos	2%
Valletta	2%
Rome	2%
Kos	2%
Marrakesh	2%
Chania	2%

- Again, with exception of Mallorca, all %s are very low at destination level
- Corfu, Fira (Santorini), Heraklion, Rhodes top alternatives in Greece
 - but none as strong as Mallorca.
- Marrakesh beats Chania!

Overall Competition to Greece - users

what % of those who searched for a Greek destination searched also for another destination

	Grand Total
Mallorca	7%
Santorini	5%
Corfu	4%
Heraklion	4%
Rhodes	3%
Athens	3%
Tenerife	3%
Barcelona	3%
Paris	3%
Fuerteventura	3%
Gran Canaria	3%
Algarve	2%
Ibiza	2%
Malaga	2%
Mykonos	2%
Southern Harbour	2%
Rome	2%
Kos	2%
Marrakesh	2%
Chania	2%
Lanzarote	2%
Antalya	2%
Catania	2%
Palermo	2%
Madeira	2%

- When considering Broad Destinations, Santorini climbs
 to top Greek position and Kos comes up as well
- Regarding international competition,
 - Algarve claims 7th position and Malaga 9th
 - Rome is out of top 10
 - Malta is pushed to No. 10 (S. Harbour) from No. 8 (Valetta)

International Competition to Greece - users

what % of those who searched for a Greek destination searched also for an international destination

Balearic Islands	11%
Canary Islands	10%
Sicily	5%
Andalusia	5%
Catalonia	3%
Sardinia	3%
Dalmatia	3%
Ile-de-France	3%
Lisbon	3%
Algarve	2%
Marrakesh-Safi	2%

- At a Regional level, Spanish destinations are the undisputed competitors of Greece
- Croatia moves in to position 7 with Dalmatia
- Turkey still out of top-10
- Marrakesh in position 11

Overall Competition to Greece - users

what % of those who searched for a Greek destination searched also for another destination

Greece	39%
Spain	34%
Italy	19%
Portugal	8%
France	7%
Germany	5%
Morocco	5%
Turkey	4%
Croatia	4%
USA	3%
Malta	3%
UK	2%

- At country level, Greek destinations compete mostly among themselves: people are looking primarily for holidays in Greece
- Spain is the second alternative
- Turkey comes after Germany and Morocco but (marginally) ahead of Croatia.

Overall Competition to Greece from DE - users

what % of those who searched for a Greek destination searched also for another destination

Greece	60%
Spain	55%
Germany	16%
Italy	15%
Turkey	13%
Portugal	7%
Egypt	7%
UAE	4%
USA	3%
Croatia	3%

When considering competition only from the
 German market, staying at home for Germans
 seems like a stronger alternative to going to
 Greece or Spain, than going to Italy, Turkey,
 Portugal etc.

Overall Competition to Greece w/o DE - users

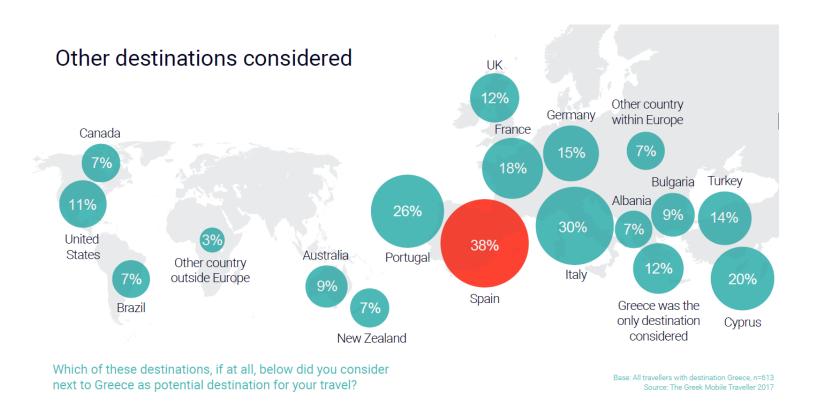
what % of those who searched for a Greek destination searched also for another destination

Spain	28%
Italy	20%
Portugal	9%
France	9%
Morocco	6%
Croatia	4%
Malta	3%
United Kingdom	3%
USA	3%
Germany	2%
Tunisia	2%
Netherlands	2%
Turkey	2%

When excluding the German market as a source,
 Germany as competition weakens a lot

Competition info from an alternative source

Google study on travel intentions to GR from DE, UK, FR markets



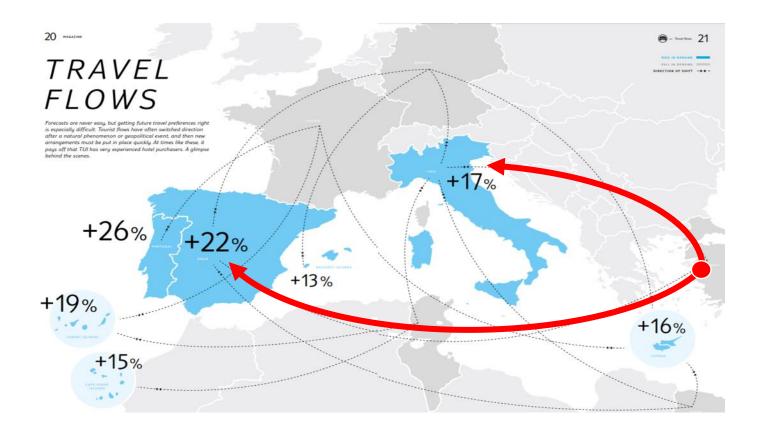
Same ranking with exception of Cyprus:

- 1. Spain
- 2. Italy
- 3. Portugal
- 4. Cyprus
- 5. France
- 6. Germany

Sources: KANTAR TNS & Google Market Insights

Turkey – Spain competition

TUI annual report 2016



Sources: TUI INSETE | travel audience

Loyalty to Greece vs Competitors - Users

	Greece	Competition	ΔGR-Comp
Austria	54%	45%	8%
Denmark	47%	46%	0%
France	43%	39%	3%
Germany	45%	55%	-11%
Italy	40%	42%	-2%
Netherlands	55%	46%	9%
Norway	43%	34%	9%
Russia	53%	51%	2%
Spain	48%	44%	4%
Sweden	50%	37%	13%
Switzerland	51%	42%	9%
UK	53%	44%	8%
US	72%	35%	36%
	50%	43%	7%

- Almost all source markets are more loyal to Greece than competition. Exceptions ...
- ... Germany and Italy which are more loyal to competition and
- ... Denmark which is equally loyal
- Highest differences: US, SE, NL,
 NO, CH and AT

Loyalty to Greece vs Competitors - Searches

	Greece	Competition	ΔGR-Comp
Austria	7%	9%	-2%
Denmark	8%	14%	-6%
France	8%	8%	-1%
Germany	7%	8%	-1%
Italy	10%	13%	-3%
Netherlands	4%	14%	-10%
Norway	15%	18%	-3%
Russia	17%	12%	5%
Spain	11%	16%	-6%
Sweden	20%	10%	11%
Switzerland	6%	6%	1%
UK	22%	16%	6%
US	17%	6%	11%
	12%	12%	0%

- Position reverses for most countries.
- Loyalty higher for GR only for US, SE, UK and CH

Top-10 competitors

Rank	Spain		Greece		Portugal	
1	Spain	64%	Greece	39%	Spain	45%
2	Italy	19%	Spain	34%	Portugal	28%
3	Greece	14%	Italy	19%	Italy	25%
4	France	10%	Portugal	8%	France	20%
5	Portugal	7%	France	7%	Greece	13%
6	Germany	6%	Germany	5%	Germany	9%
7	Morocco	6%	Morocco	5%	UK	8%
8	Turkey	5%	Turkey	4%	Morocco	7%
9	UK	4%	Croatia	4%	USA	5%
10	Croatia	3%	USA	3%	Netherlands	4%

- In Spain and in Greece, competition is strongest from within the country.
- In Portugal it is from Spain,
 but Portugal is a weaker competitor of Spain than Italy, Greece and France.
- Spain is Greece's largest competitor but Greece comes after Italy as a competitor to Spain.
- Spain appears to be much stronger than Italy.



So what?

- 1. Find brand strength of your destination
- 2. Find your real competitors
- 3. Advertise VS Competitors
- 4. Monitor results





Thank you!

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