Using Big Data to analyse loyalty to & competing destinations

INSETE

Dr. Aris Ikkos, ISHC

Research Director

Evangelia Lambrou

Researcher - Statistician

travel audience

Sandro Cuzzolin

Global Sales Director

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3. Digital campaigns
4. Targeted publicity and promotion
5. Opening up new markets with new communication channels


travel audience:
converting consumers into travelers



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

% of those who searched only for destination

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

% of those who searched only for destination

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

International Competition to Greece - users

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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thes/niki	Zakynthos	Grand Total
Mallorca	1%	0%	1%	1%	1%	0%	2%	0%	0%	0%	7%
Tenerife	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Barcelona	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Paris	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Fuerteventura	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Gran Canaria	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Ibiza	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Valletta	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Rome	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Marrakesh	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%

- All %s are very low – no single strong competitor
- 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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Mallorca	1%	0%	1%	1%	1%	0%	2%	0%	0%	0%	7%
Corfu	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	4%
Fira	1%	0%	0%	0%	0%	1%	0%	1%	0%	0%	4%
Heraklion	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%	4%
Rhodes	0%	0%	1%	1%	1%	0%	0%	0%	0%	0%	3%
Athens	0%	0%	0%	1%	0%	1%	0%	0%	1%	0%	3%
Tenerife	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Barcelona	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Paris	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Fuerteventura	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Gran Canaria	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Ibiza	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Mykonos	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Valletta	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Rome	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Kos	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	2%
Marrakesh	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Chania	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%

- Corfu, Fira (Santorini), Heraklion, Rhodes top alternatives in Greece – 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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Mallorca	1%	0%	1%	1%	1%	0%	2%	0%	0%	0%	7%
Santorini	1%	0%	0%	1%	0%	1%	0%	1%	0%	0%	5%
Corfu	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	4%
Heraklion	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%	4%
Rhodes	0%	0%	1%	1%	1%	0%	0%	0%	0%	0%	3%
Athens	0%	0%	0%	1%	0%	1%	0%	0%	1%	0%	3%
Tenerife	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Barcelona	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Paris	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Fuerteventura	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Gran Canaria	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Algarve	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%
Ibiza	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Malaga	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Mykonos	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Southern Harbour	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Rome	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Kos	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	2%
Marrakesh	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Chania	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%
Lanzarote	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	2%
Antalya	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	2%
Catania	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Palermo	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Madeira	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%

- Santorini climbs to top Greek position
- Kos comes up

International Competition to Greece - users

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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Mallorca	1%	0%	1%	1%	1%	0%	2%	0%	0%	0%	7%
Tenerife	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Barcelona	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Paris	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Fuerteventura	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Gran Canaria	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	3%
Algarve	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%
Ibiza	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Malaga	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Southern Harbour	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%

- Similar picture, except that 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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Balearic Islands	1%	0%	1%	2%	1%	1%	3%	1%	0%	1%	11%
Canary Islands	1%	0%	1%	1%	1%	1%	3%	1%	0%	1%	10%
Sicily	1%	0%	0%	1%	0%	1%	1%	0%	0%	0%	5%
Andalusia	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	5%
Catalonia	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	3%
Sardinia	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	3%
Dalmatia	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	3%
Ile-de-France	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Lisbon	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	3%
Algarve	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%
Marrakesh-Safi	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%

- Spain is the undisputed competitor 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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Greece	6%	2%	3%	7%	4%	4%	7%	2%	2%	3%	39%
Spain	5%	1%	3%	5%	3%	3%	7%	3%	1%	2%	34%
Italy	4%	1%	1%	3%	1%	2%	3%	1%	1%	1%	19%
Portugal	2%	0%	0%	2%	0%	1%	1%	0%	0%	0%	8%
France	3%	0%	0%	2%	0%	1%	1%	0%	0%	0%	7%
Germany	1%	0%	0%	1%	1%	0%	1%	0%	1%	0%	5%
Morocco	1%	0%	0%	1%	0%	1%	1%	0%	0%	0%	5%
Turkey	1%	0%	0%	1%	1%	0%	1%	0%	0%	0%	4%
Croatia	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	4%
USA	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Malta	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	3%
UK	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%

- Greek destinations compete mostly among themselves: people are looking primarily for holidays in Greece, the rest is competition
- Turkey comes after Germany and Morocco.

Overall Competition to Greece from DE - users

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

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Greece	4%	2%	8%	11%	11%	2%	14%	2%	4%	3%	60%
Spain	3%	1%	7%	7%	12%	1%	17%	2%	2%	3%	55%
Germany	3%	1%	1%	3%	2%	0%	3%	0%	2%	0%	16%
Italy	2%	0%	2%	2%	3%	0%	4%	1%	1%	1%	15%
Turkey	1%	0%	2%	2%	3%	0%	5%	0%	1%	0%	13%
Portugal	1%	0%	1%	1%	1%	0%	2%	0%	0%	0%	7%
Egypt	0%	0%	1%	1%	2%	0%	2%	0%	0%	0%	7%
UAE	0%	0%	0%	0%	1%	0%	2%	0%	0%	0%	4%
USA	1%	0%	0%	1%	1%	0%	1%	0%	0%	0%	3%
Croatia	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	3%

- 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

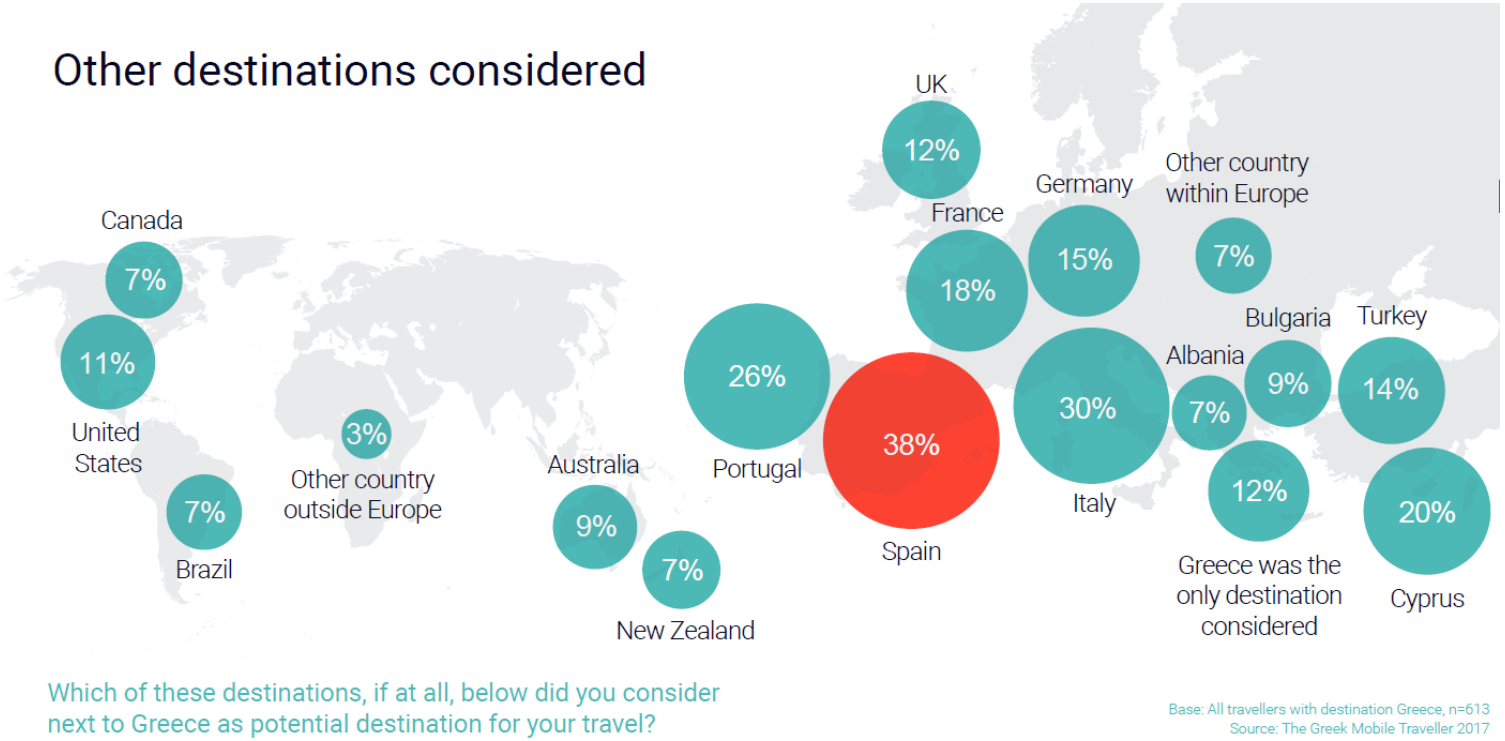
what % of those who searched for a Greek destination searched also for another destination

	Athens	Chania	Corfu	Heraklion	Kos	Mykonos	Rhodes	Santorini	Thessaloniki	Zakynthos	Grand Total
Spain	6%	1%	2%	4%	1%	4%	4%	3%	1%	2%	28%
Italy	5%	1%	1%	3%	0%	3%	3%	2%	1%	1%	20%
Portugal	3%	0%	0%	2%	0%	1%	1%	0%	0%	0%	9%
France	3%	0%	0%	2%	0%	1%	1%	0%	0%	0%	9%
Morocco	2%	0%	0%	1%	0%	1%	1%	0%	0%	0%	6%
Croatia	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	4%
Malta	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	3%
United Kingdom	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
USA	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Germany	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Tunisia	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Netherlands	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Turkey	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%

- Germany as competition weakens a lot if DE is taken out of the sample as a source market

Competition info from an alternative source

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



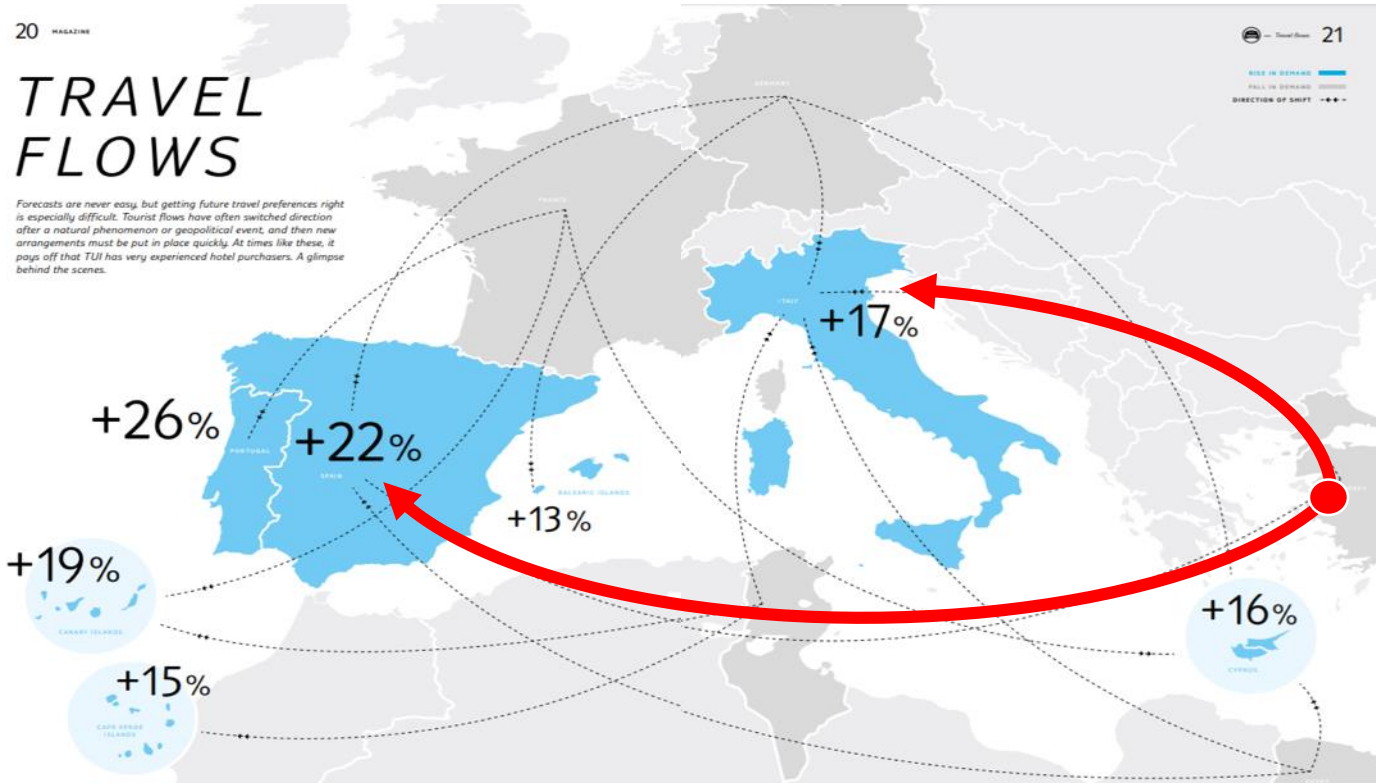
Same ranking
with exception of Cyprus:

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

Loyalty to Greece vs Competitors - Users

% of those who searched only for destination

	Greece	Competition	Δ GR - 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

% of those who searched only for destination

	Greece	Competition	Δ GR - 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.

Important differentiations among markets

Competition to Athens from DE GB RU

	German Market		UK Market		US Market	
Rank	Competition	Users	Competition	Users	Competition	Users
1	Mallorca	6%	Barcelona	4%	Rome	12%
2	Berlin	4%	Paris	4%	Paris	6%
3	Oberbayern	4%	Rome	4%	Darmstadt	4%
4	Darmstadt	4%	Madrid	2%	Barcelona	4%
5	Barcelona	4%	Milan	2%	Milan	4%
6	Rome	3%	Istanbul	2%	Madrid	3%
7	Hamburg	3%	Tenerife	2%	Venice	3%
8	Duesseldorf	3%	Malaga	2%	Istanbul	2%
9	Paris	2%	Darmstadt	2%	Naples	2%
10	Antalya	2%	Berlin	2%	Oberbayern	1%
11	Istanbul	2%	Southern Harbour	1%	Palermo	1%
12	Gran Canaria	2%	Venice	1%	Florence	1%
13	Madrid	2%	Marrakesh	1%	Alpes-Maritimes	1%
14	Stuttgart	2%	Grande Porto	1%	Grande Porto	1%
15	Malaga	2%	Mallorca	1%	Catania	1%
16	Tenerife	2%	Alpes-Maritimes	1%	Berlin	1%
17	Milan	2%	Alicante	1%	Cairo	1%
18	Cologne	2%	Algarve	1%	Malaga	1%
19	Algarve	1%	Naples	1%	Marrakesh	1%
20	Middle Franconia	1%	Ibiza	1%	Casablanca	1%

- Athens competes with major European cities
- Despite similar Loyalty Indexes (L.I.), competition is very different among the 3 markets
  - DE: competes w. S&B
  - UK and US: city break
- Turkish destination (Istanbul) appears in picture but with low intensity



So what?

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

Thank you!

INSETE

Institute SETE
32 Voukourestiou Str.
106 71 Athens
www.insete.gr

intelligence@insete.gr
☎ +30 210 3244 368

travel audience

travel audience GmbH
Elsenstraße 106
12435 Berlin
www.travelaudience.com

s.cuzzolin@travelaudience.com
☎ +49 15114240038

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