



ΕΖΘ

# Tourist Satisfaction Survey December 2013

**gbr**  
consulting

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**Sponsor**

 **AEGEAN**

A STAR ALLIANCE MEMBER 



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# Tourist Satisfaction Survey

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# Survey characteristics

- ▶ Method: questionnaire
- ▶ Sample: ~1,150 questionnaires
- ▶ Collected in the period July – October
- ▶ From 42 hotels of the categories 1\* - 5\*,  
all members of the Thessaloniki Hotel Association

# Summary

Profile: 30 – 50 years old, travelling with partner to Thessaloniki for the first time, by plane or car for pleasure and stays 3.7 nights

37%

got a suggestion from  
relative / friend

7.9

is the overall  
assessment mark

37%

uses hotel review  
sites

44%

booked online

59%

visits the White Tower

58%

comes to Thessaloniki  
for its personality!

91%

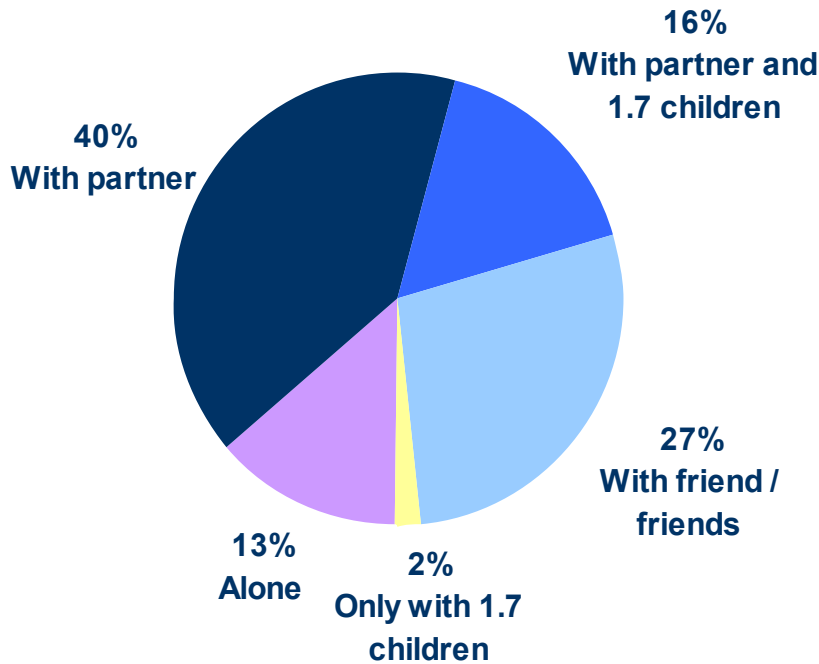
would recommend  
Thessaloniki

74%

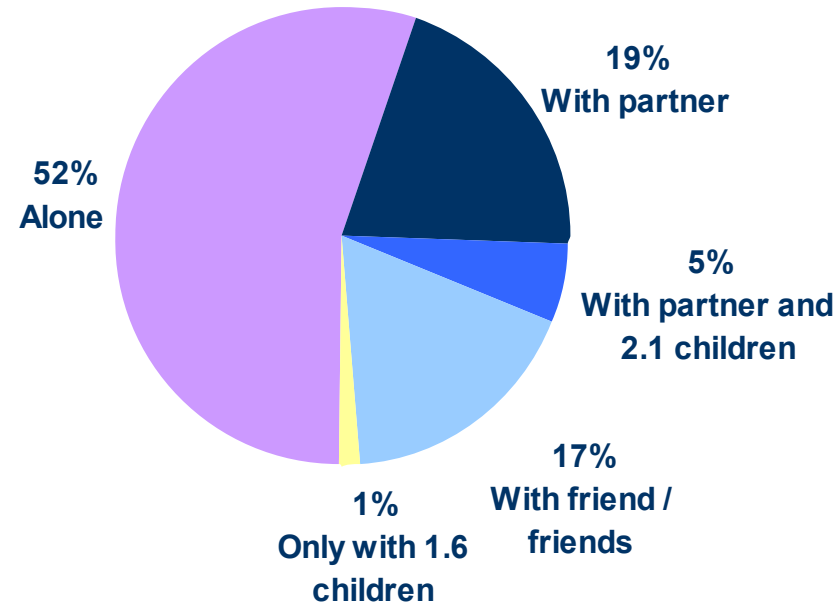
is using social media,  
mainly Facebook

# Tourists Profile

## Leisure

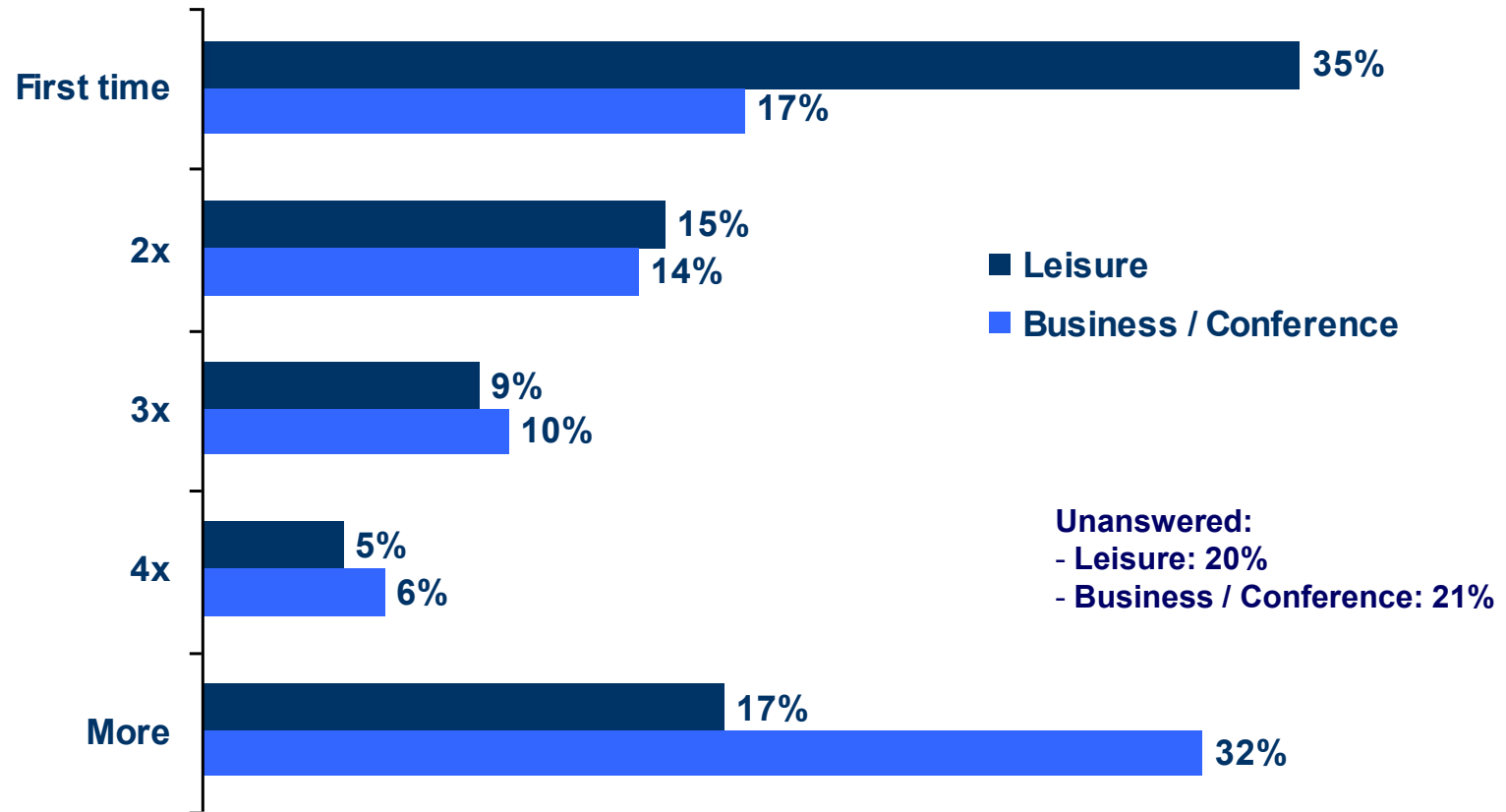


## Business / conference



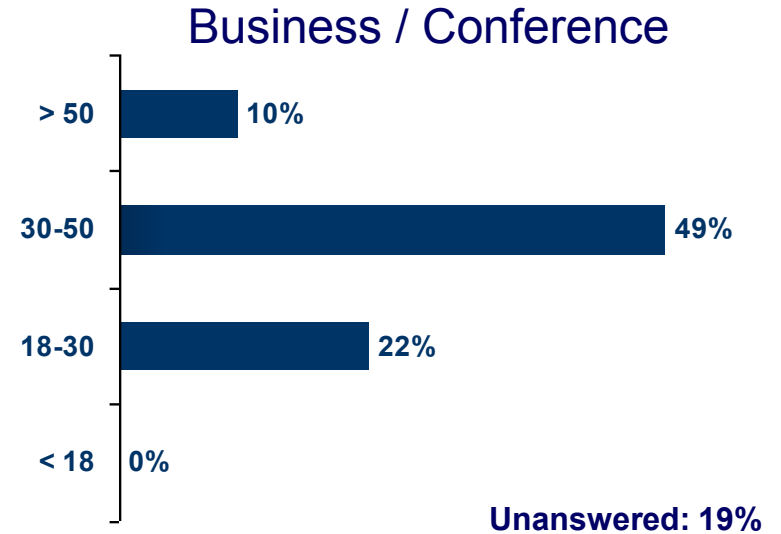
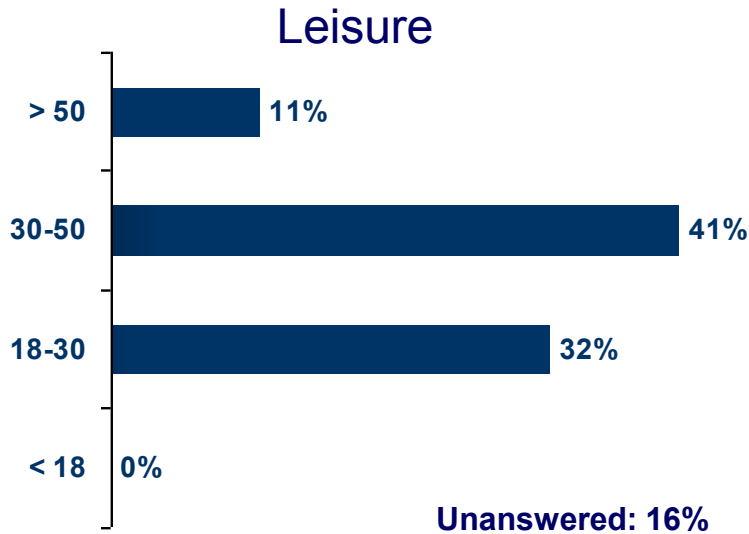
Most leisure tourists travel to Thessaloniki with their partner or with friends. The business traveller prefers to travel alone, but about a third travels with their partner or with a friend(s).

# Frequency of visit



The majority of the leisure traveller comes for the first time to Thessaloniki, while the business / conference traveller has come many times to Thessaloniki.

# Age group & average length of stay

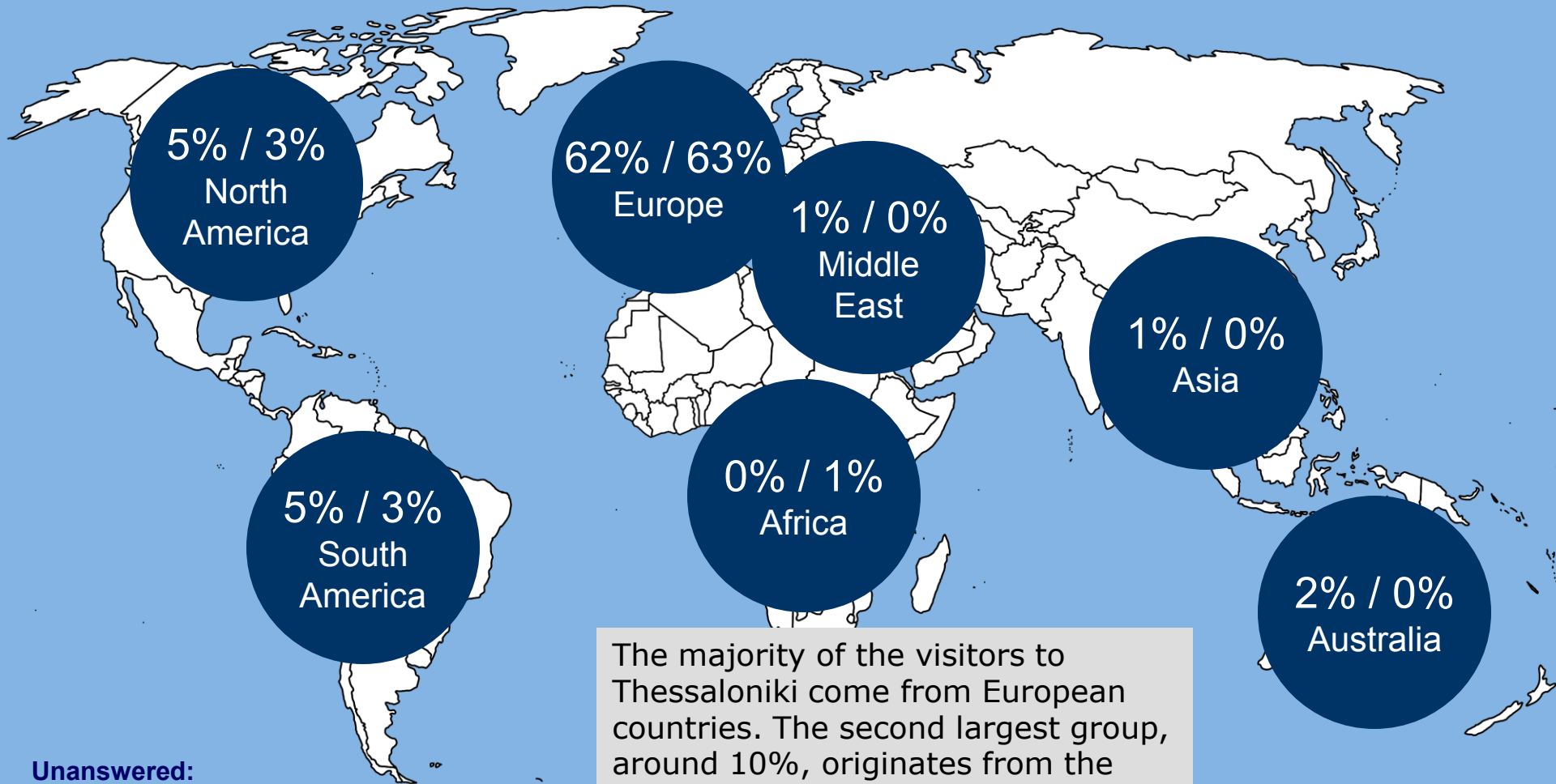


**3.9** nights  
average length of stay

**3.5** nights  
average length of stay

Most travellers fall in the 30 – 50 years age bracket. The leisure travellers stays longer though than the business traveller, namely 3.9 and 3.5 nights respectively.

# Geographic spread: Leisure - Business / conference



## Unanswered:

- Leisure: 28%

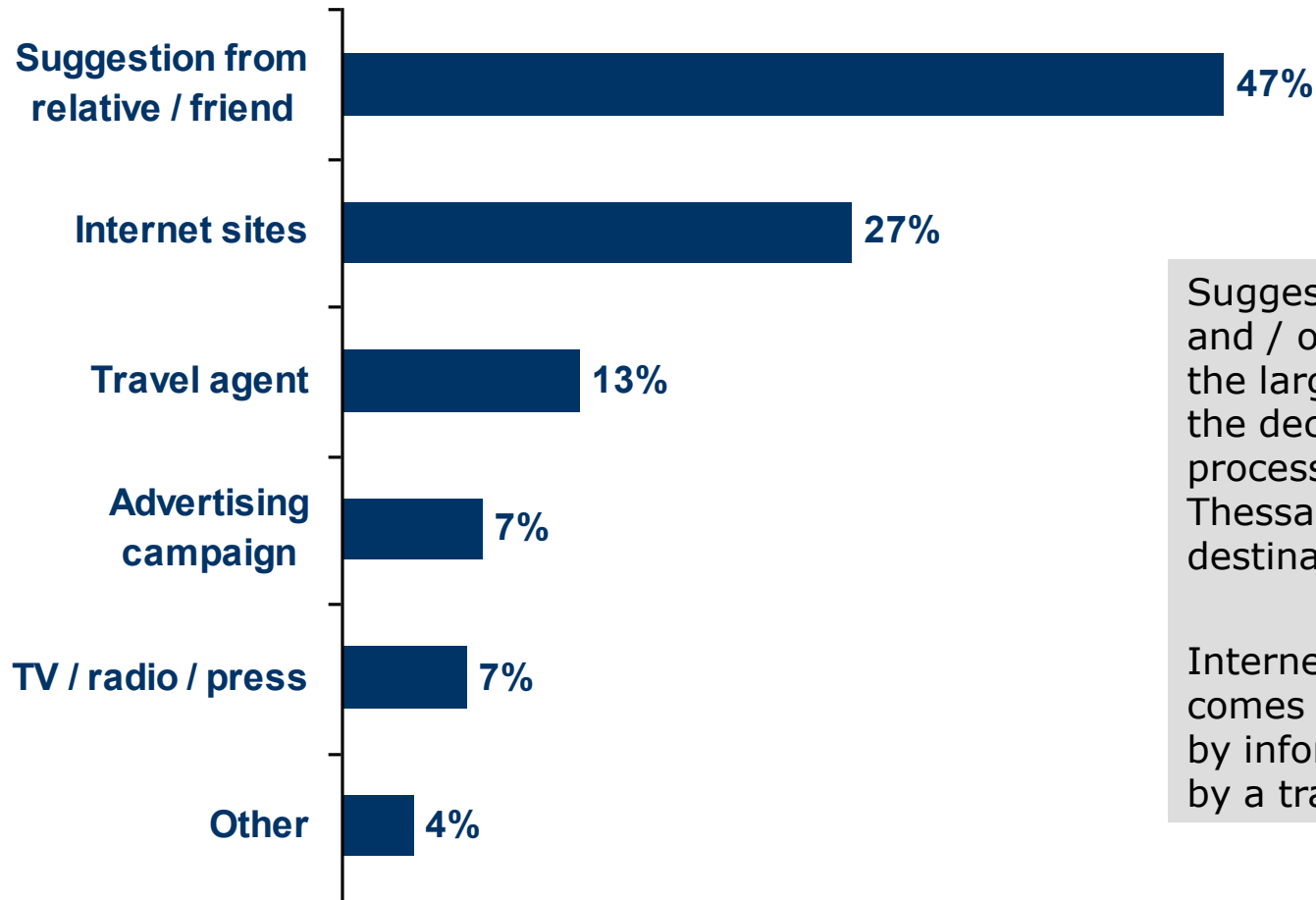
- Business / conference: 33%

The majority of the visitors to Thessaloniki come from European countries. The second largest group, around 10%, originates from the Americas with respect to the leisure travellers.



# The leisure traveller: choice influence

What influenced the choice for Thessaloniki?

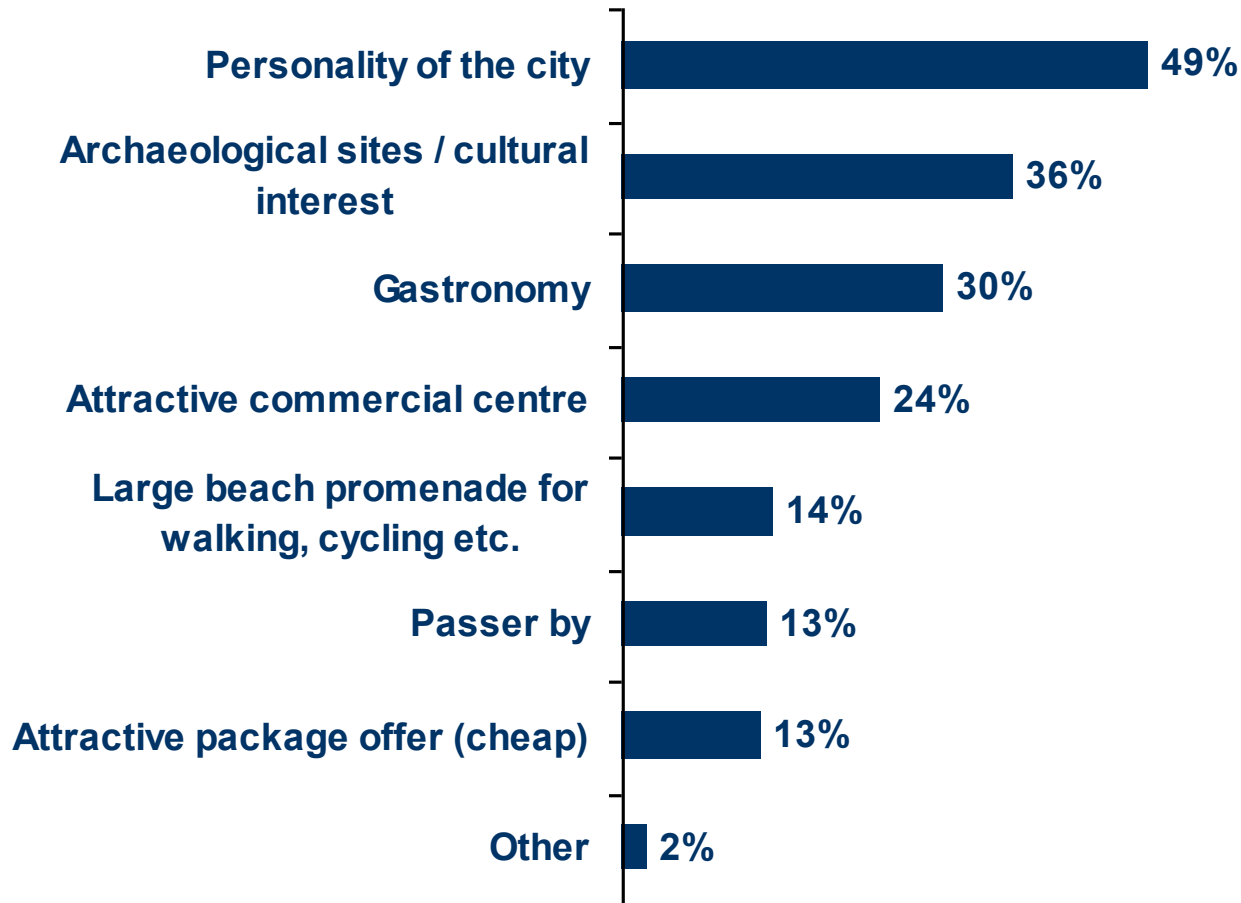


Suggestions from friends and / or relatives is of the largest influence in the decision making process to choose Thessaloniki as the destination.

Internet sites in general comes second, followed by information supplied by a travel agent.

# The leisure traveller: why Thessaloniki?

## Why Thessaloniki as your leisure destination



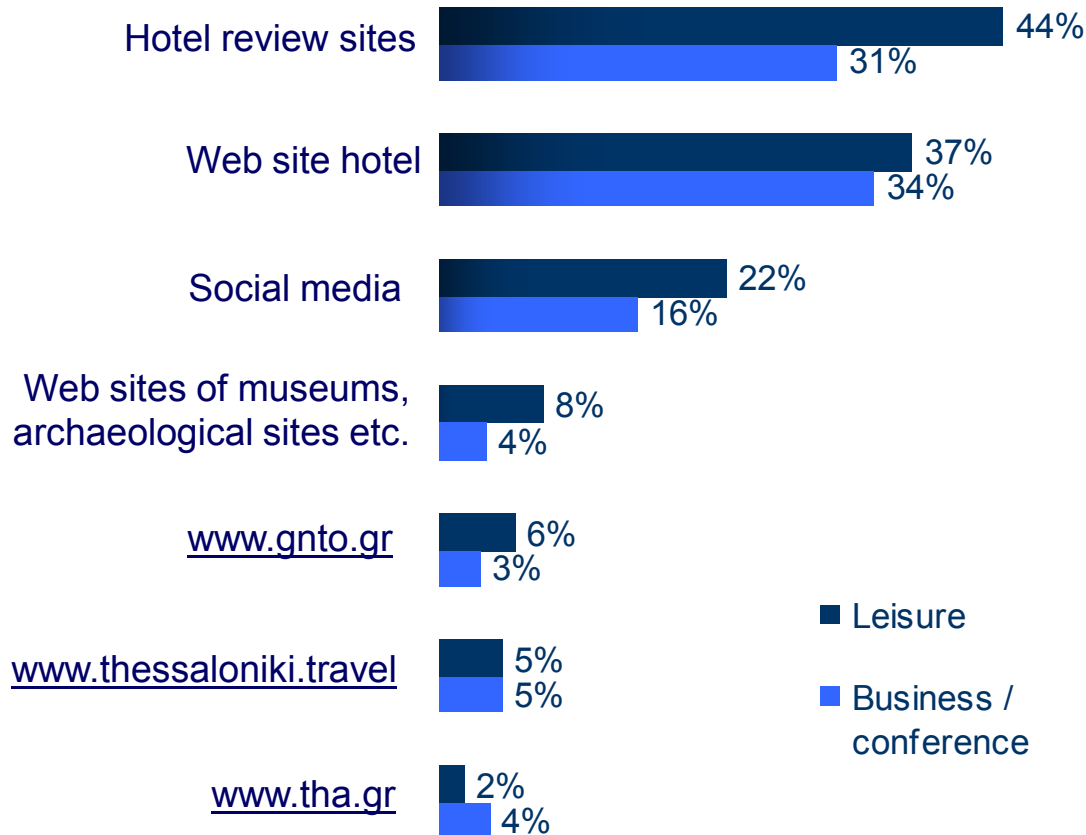
Leisure tourists have clearly chosen Thessaloniki because of its pleasant personality.

In second place are the archaeological sites and cultural interest followed by the city's gastronomy.

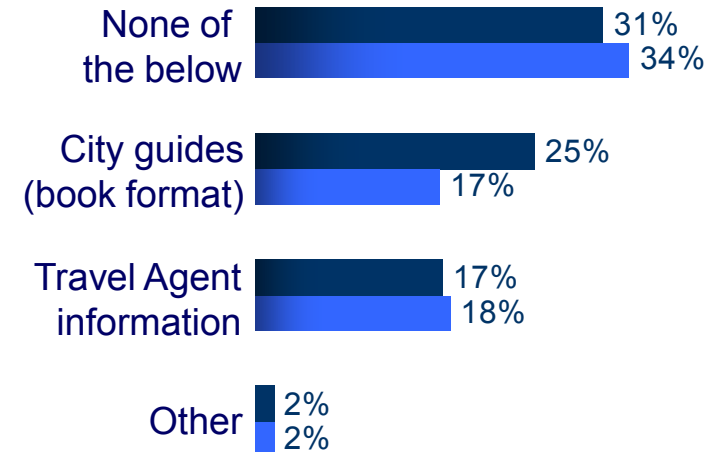
The price (a cheap package offer) does not seem to play a decisive role in visiting Thessaloniki.

# Trip preparation

## Online



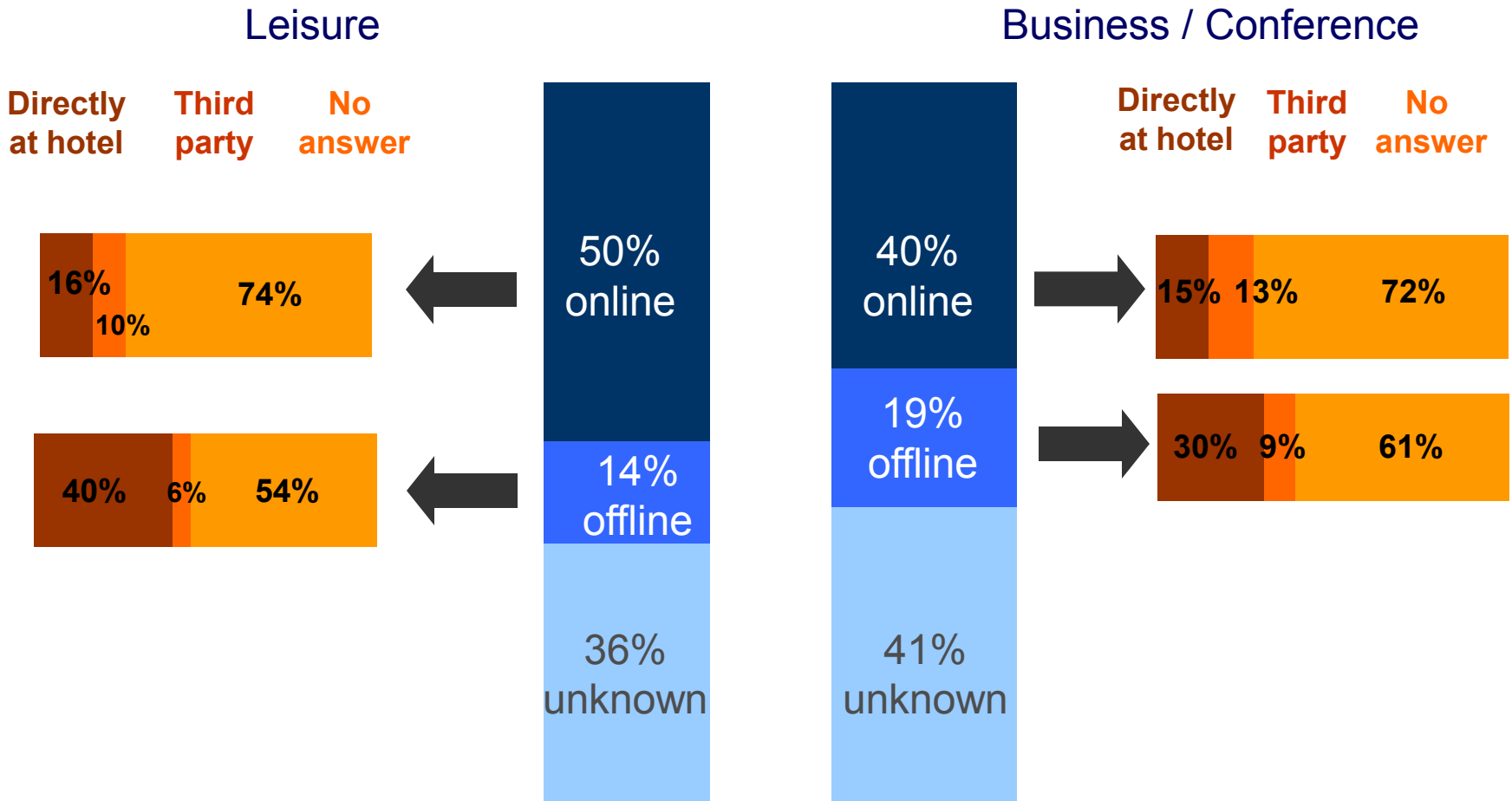
## Offline



Hotel review sites is the most important form of trip preparation, showing also the importance of this tool for hoteliers. In second place is the web site of the hotel.

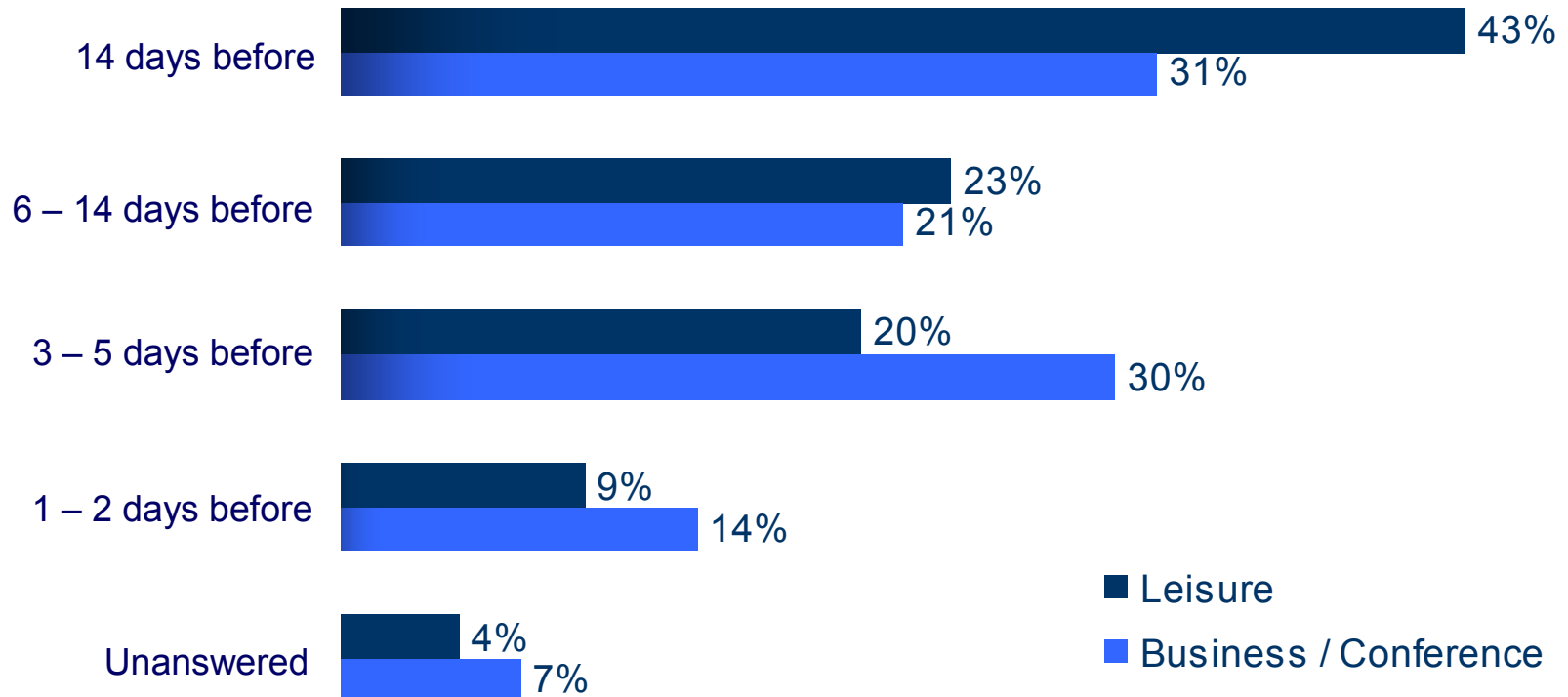
Few have visited [www.thessaloniki.travel](http://www.thessaloniki.travel), the promotional site of Thessaloniki.

# Reservation



Half of the leisure tourists book online , of which mostly directly at the hotel (of those respondents that have answered). Around 40% of the business travellers book online. From the offline bookers the largest group of those who answered the question, booked directly at the hotel, namely 40% and 30% for leisure and business travellers respectively.

How many days before did you decide to travel to Thessaloniki?



Visitors to Thessaloniki decided well in advance to travel to Thessaloniki and that includes the business traveller. The smallest group decides just 1 – 2 days before, both for leisure and business travellers. This means that there is sufficient time between the decision and the booking / actual departure to inform the traveller.

# Social media

Leisure

Business / conference

**78%**  
is using social media  
(17% is not using it)

**73%**  
is using social media  
(18% is not using it)

79%

**facebook**

75%

44%



40%

40%



36%

38%



36%

15%



24%

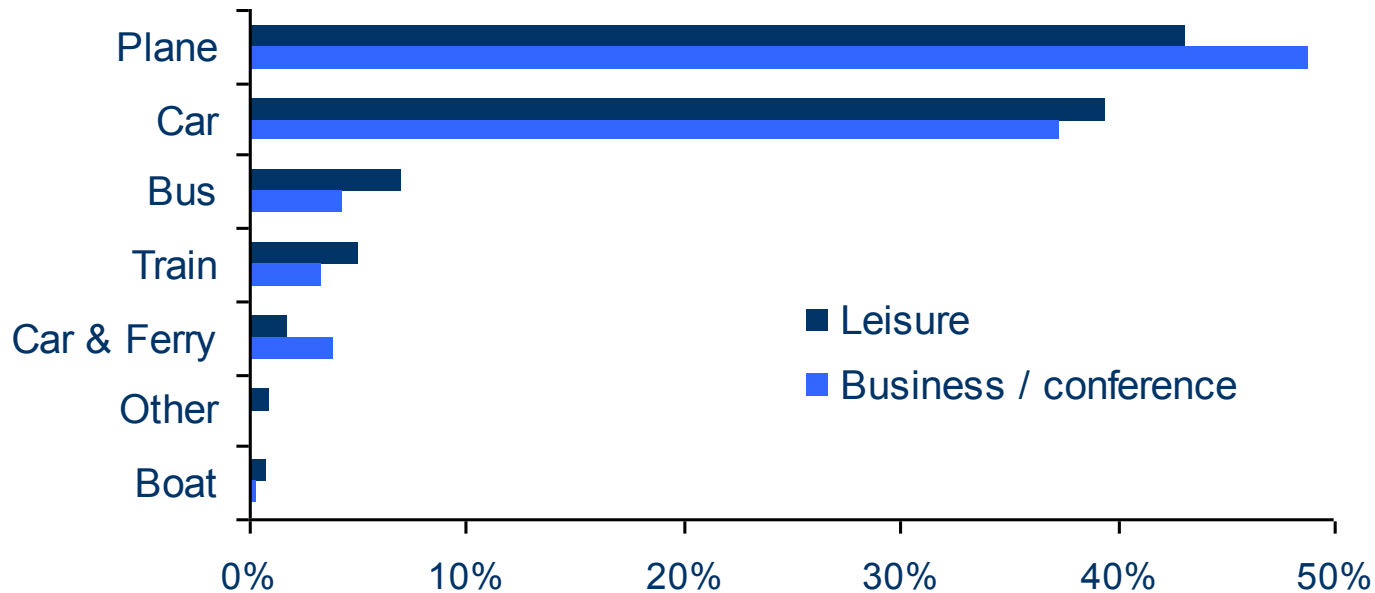
22%



27%

Almost 8 out of 10 leisure travellers are using social media and more than 7 out of 10 of the business travellers. In both groups facebook is the most popular platform, followed by YouTube, Twitter and Trip Advisor. LinkedIn is more popular in the business segment.

# Forms & convenience of transportation to Thessaloniki



87%

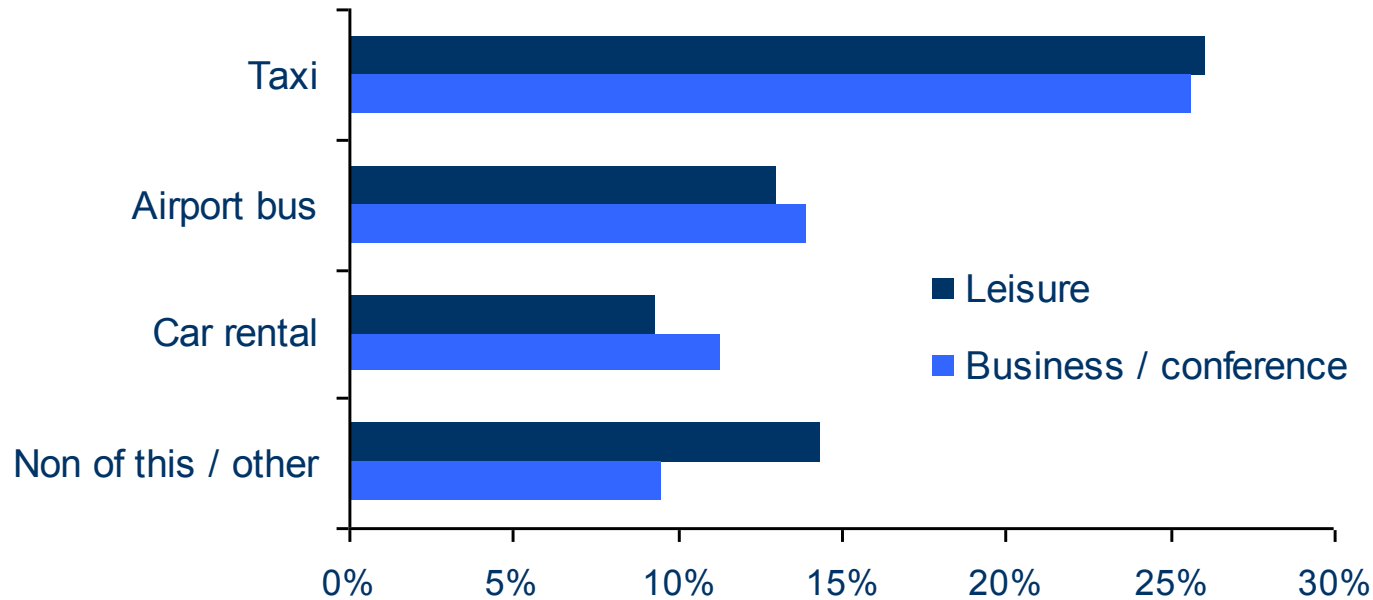
of leisure travellers found  
the access convenient

80%

of business travellers found  
the access convenient

People are travelling to Thessaloniki by plane or by car. It is important to note that apparently the convenience of the access to Thessaloniki is higher rated by leisure travellers than business travellers, 87% and 80% respectively.

# Forms & convenience of transportation to the hotel



87%

of leisure travellers found  
the access convenient

84%

of business travellers found  
the access convenient

Taxi is the preferred mode of transport from the airport to the hotel. Both categories are paying around € 20 for their trip. A large majority considers the access to the hotel convenient.



# Expenditure

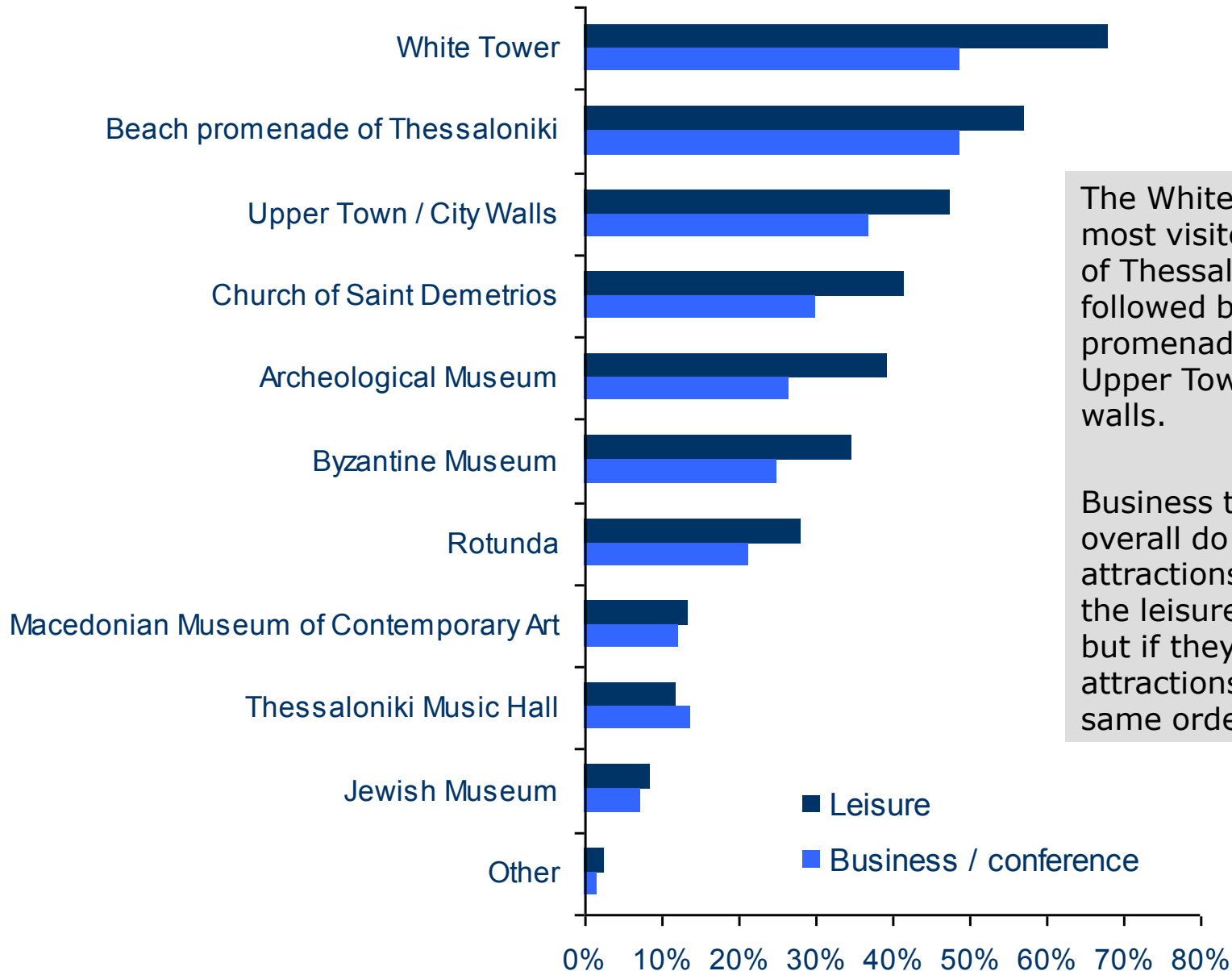
## Expenditure per person per day

	Leisure	Business / Conference
Attractions & Entertainment	€ 13.42	€ 9.20
Restaurants & cafes	€ 19.44	€ 16.04
Shopping	€ 22.60	€ 23.67
Other	€ 15.12	€ 13.27
<b>Total</b>	<b>€ 70.58</b>	<b>€ 62.18</b>

The business travellers are overall spending less than its leisure counterparts. Only in one category the business traveller spends more: shopping.

As a total the leisure travellers are spending € 71 per day, while the business traveller spends € 62 per day.

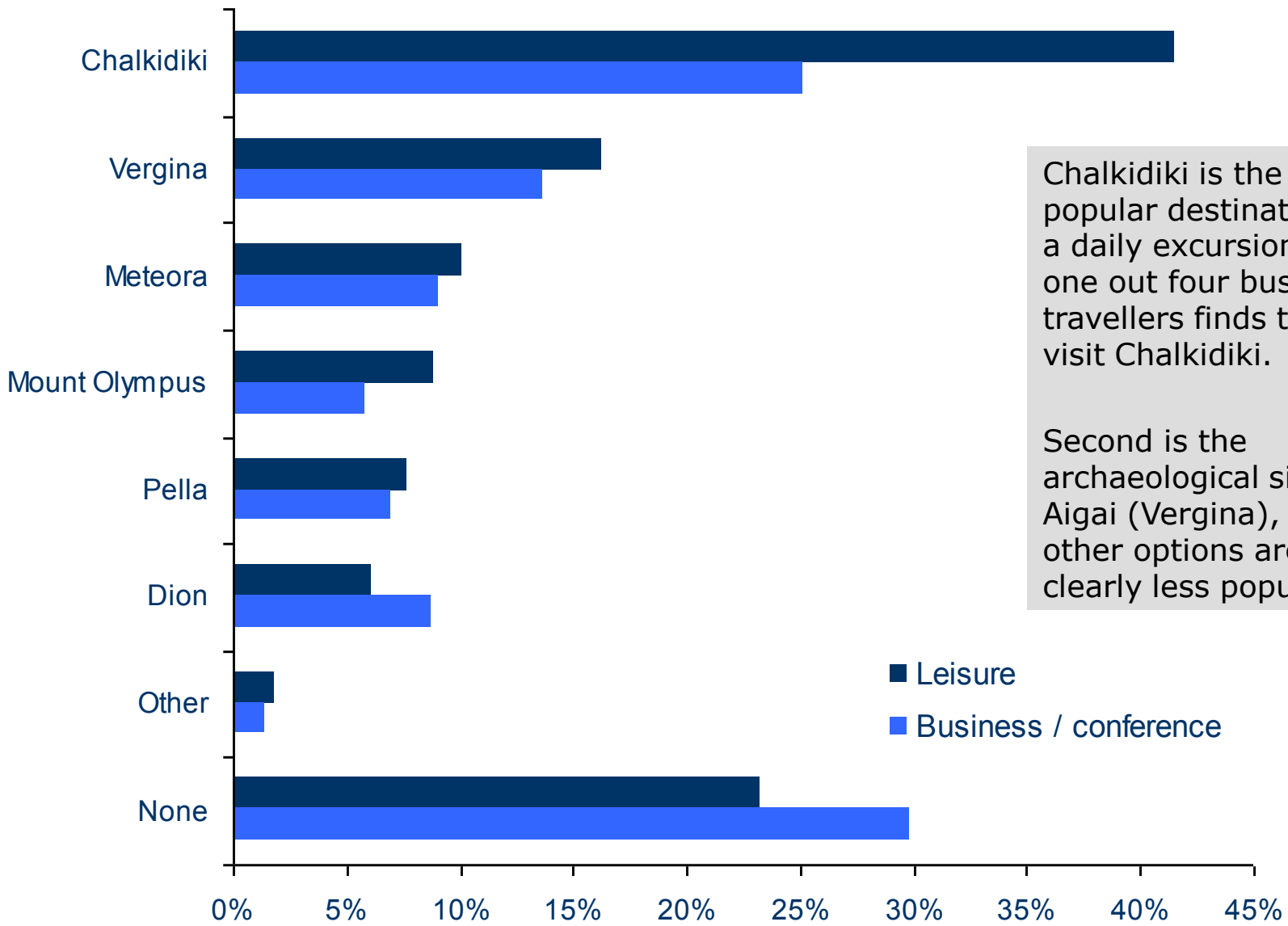
# Attractions



The White Tower is the most visited attraction of Thessaloniki, followed by the beach promenade and the Upper Town / city walls.

Business travellers overall do not visit the attractions as much as the leisure travellers, but if they do visit, the attractions have the same order as leisure.

# Daily excursions



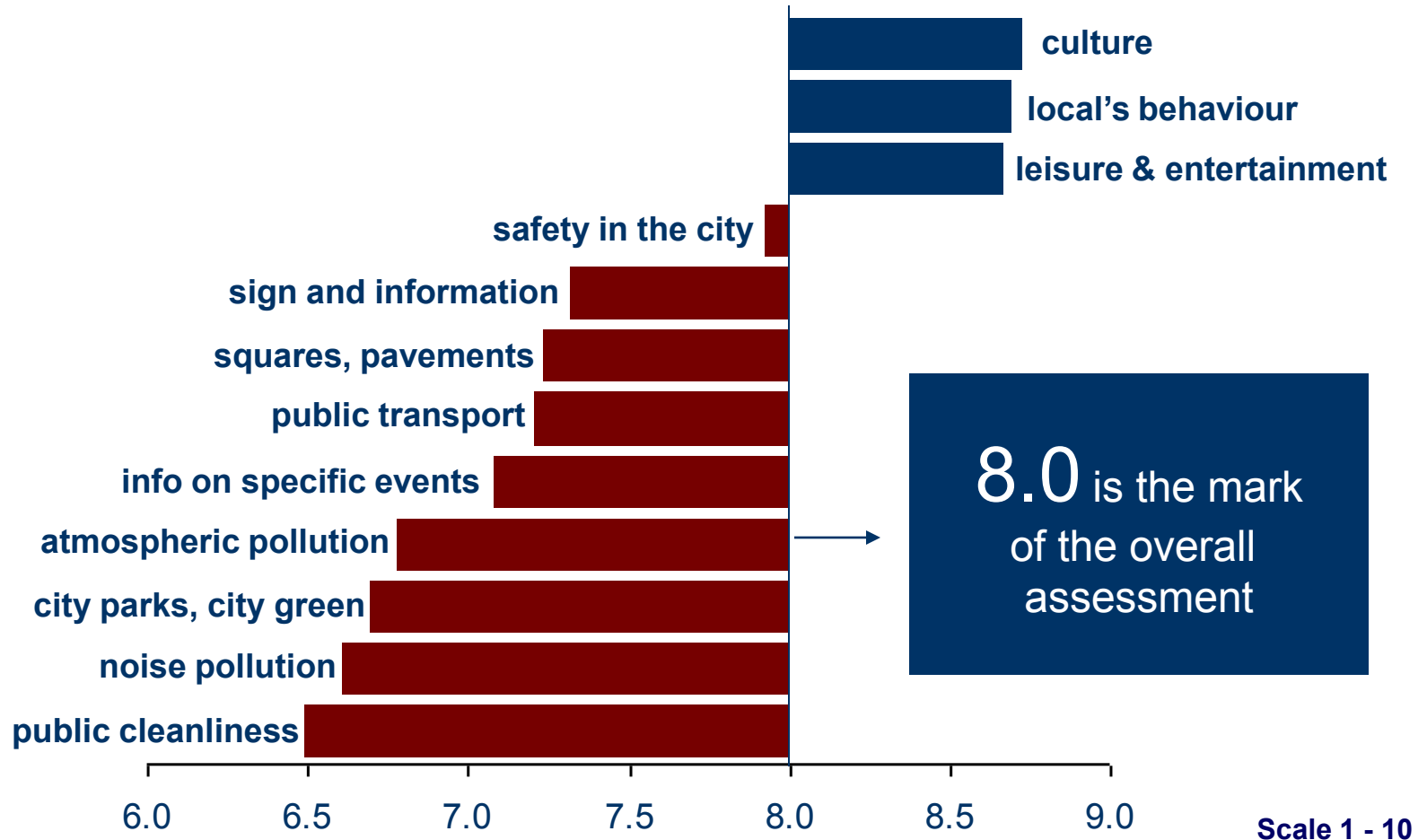
Chalkidiki is the most popular destination for a daily excursion. Even one out of four business travellers finds time to visit Chalkidiki.

Second is the archaeological site of Aigai (Vergina), while other options are clearly less popular.

■ Leisure  
■ Business / conference

# Evaluation leisure travellers

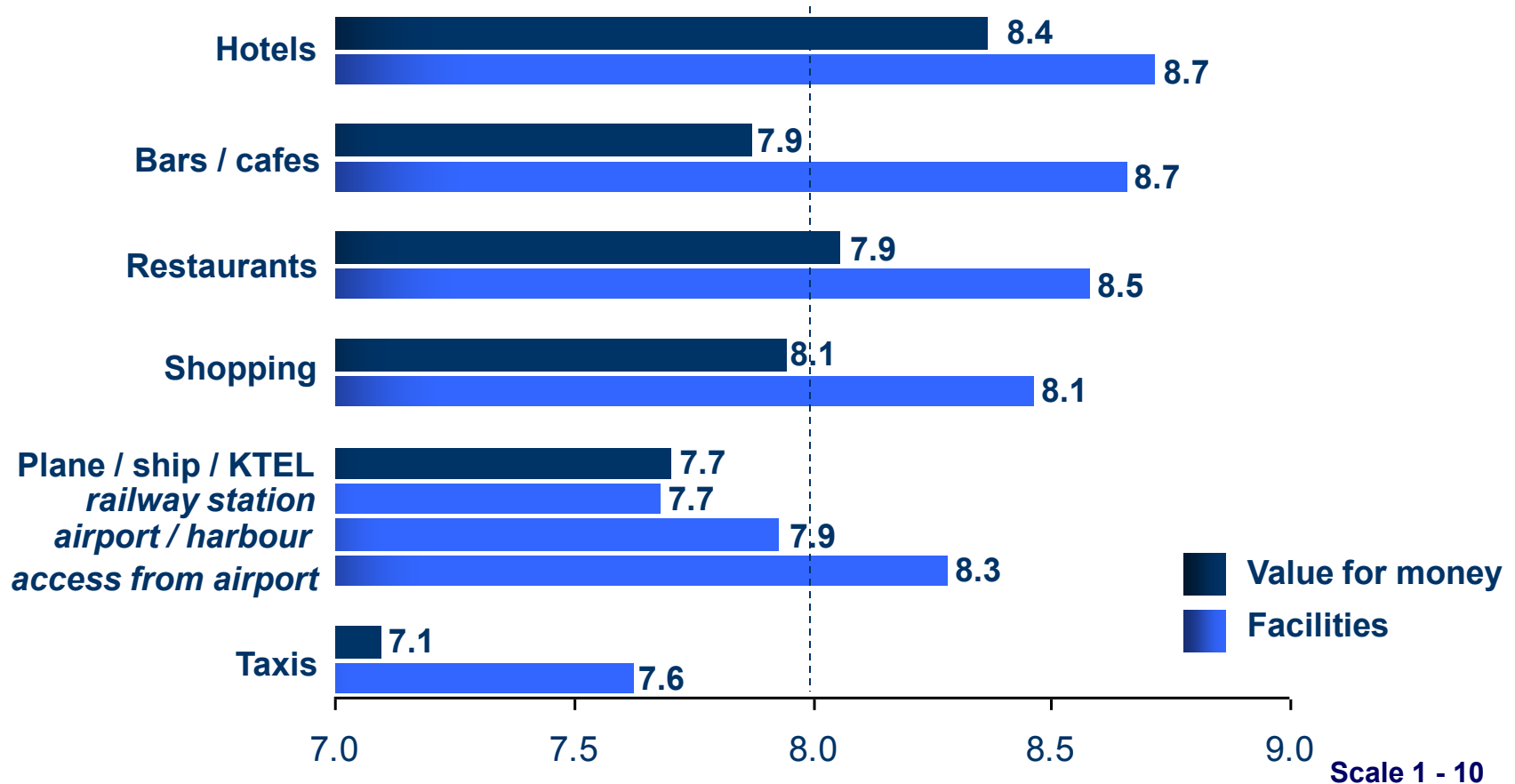
## Evaluation of different aspects



Leisure tourists rate their visit to Thessaloniki with a high mark of 8.0. They are particularly impressed by the culture of Thessaloniki, the local's behaviour and the leisure and entertainment options. Safety is apparently no issue, while noise pollution and public cleanliness are getting relatively low marks.

# Evaluation leisure travellers

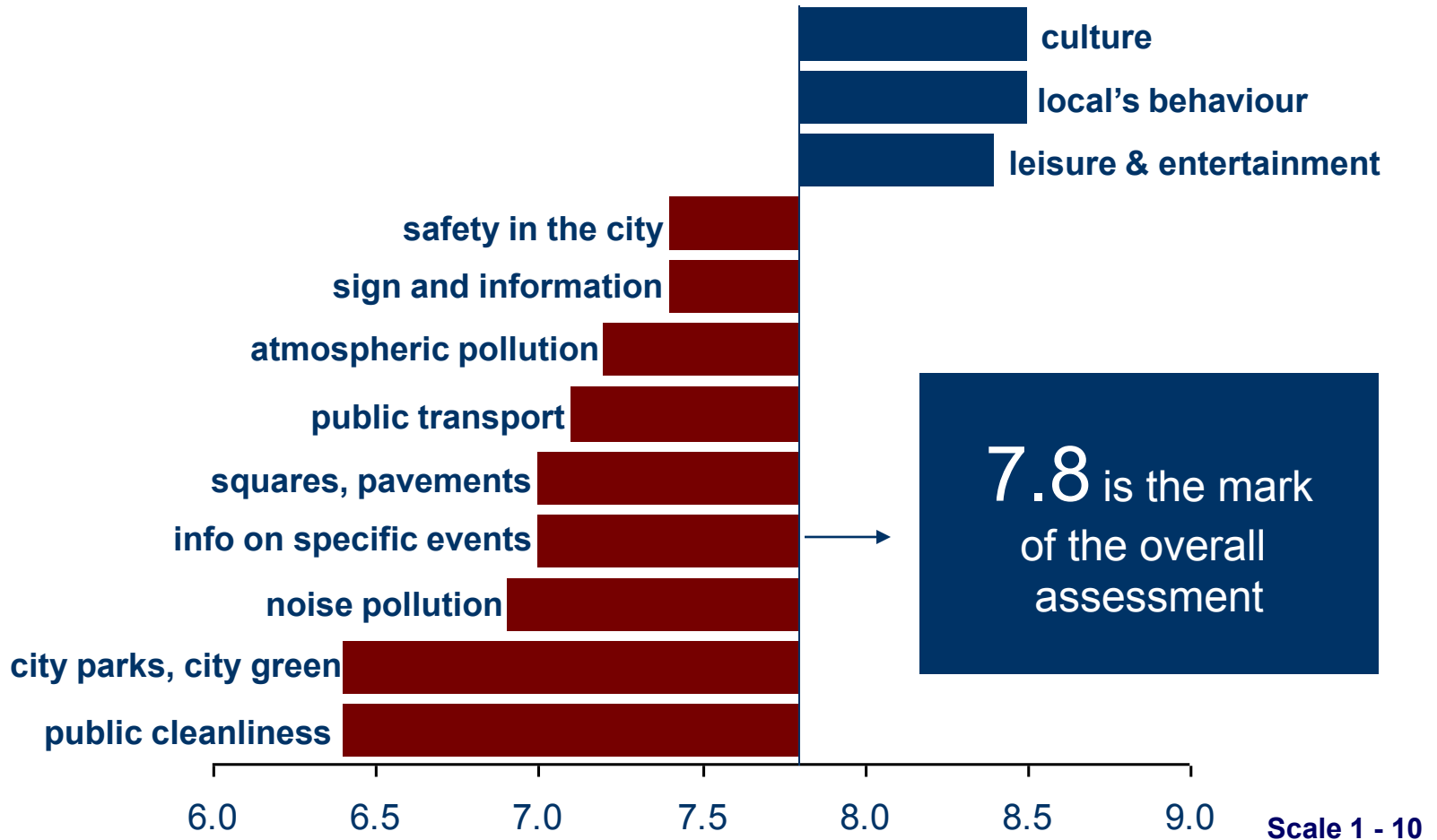
## Facilities vs Value for Money



Leisure travellers rate the hotel facilities as well as its value for money the highest with marks of 8.7 and 8.4 respectively. Bars / cafes, restaurants and shopping are also very high scored, while transportation scores lower, especially the value for money of taxis.

# Evaluation business travellers

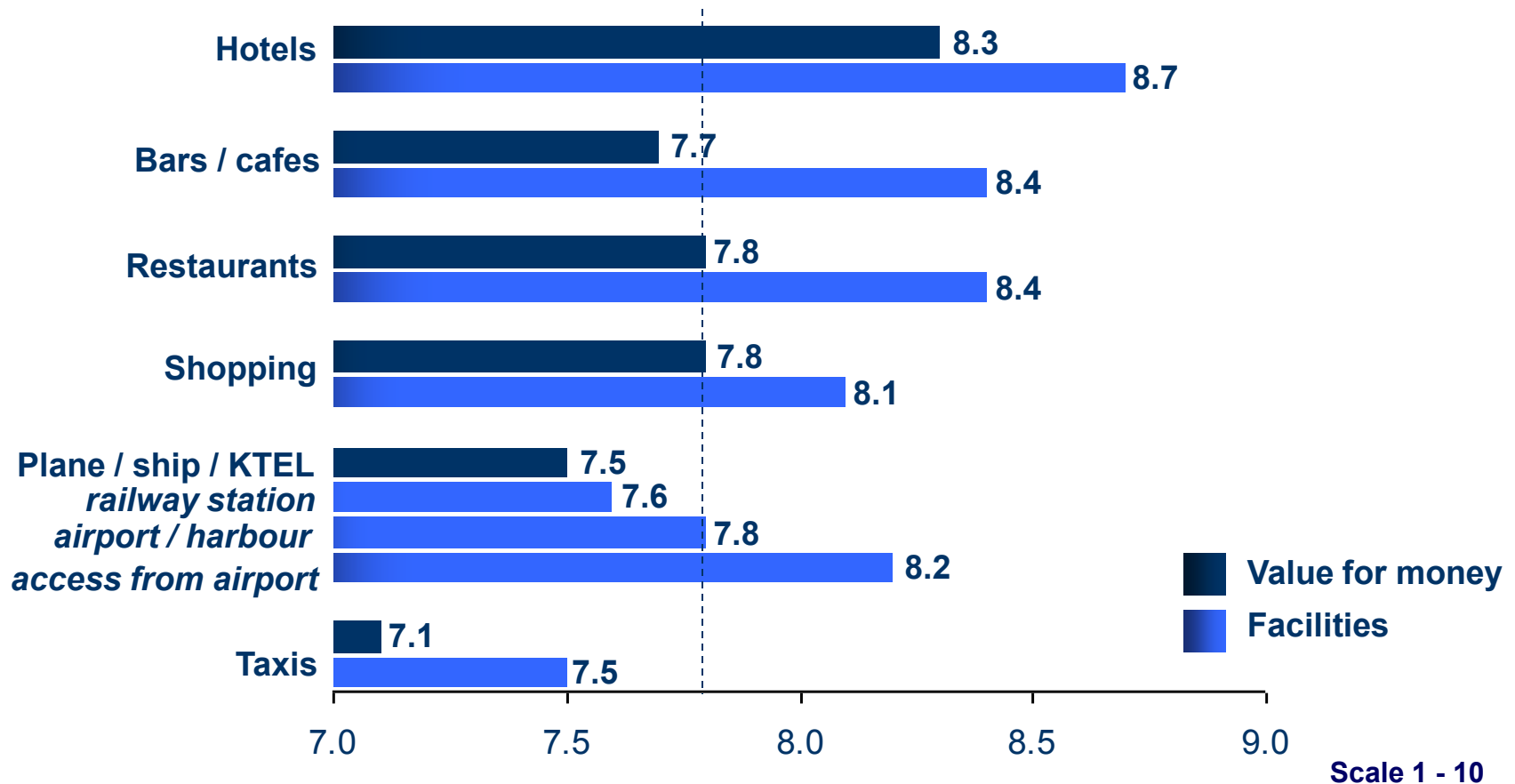
## Evaluation of different aspects



The overall assessment of the business traveller is slightly lower than the leisure traveller with an overall mark of 7.8. Overall they rate the various aspects lower, especially safety in the city, namely 7.4 versus 7.9 of the leisure travellers. On the other hand the business traveller rates atmospheric and noise pollution better than the leisure traveller.

# Evaluation business travellers

## Facilities vs Value for Money



Overall the business traveller has a more critical stance on Thessaloniki with the exception of the hotel facilities. The business traveller rates the hotel facilities same as the leisure traveller with a mark of 8.7. The hotel value for money is slightly lower with a mark of 8.3 versus 8.4 of the leisure traveller.

# Recommendation

Leisure

**93%** would recommend  
Thessaloniki to other people  
(6% would not)

**Yes!**

*“great city”*

*“excellent services & attitude”*

Business /  
Conference

**91%** would recommend  
Thessaloniki to other people  
(6% would not)

**but...**

*“car parking problematic”*

An overwhelming 93% of the leisure travellers and 91% of the business travellers would recommend the city of Thessaloniki to their relatives and friends.

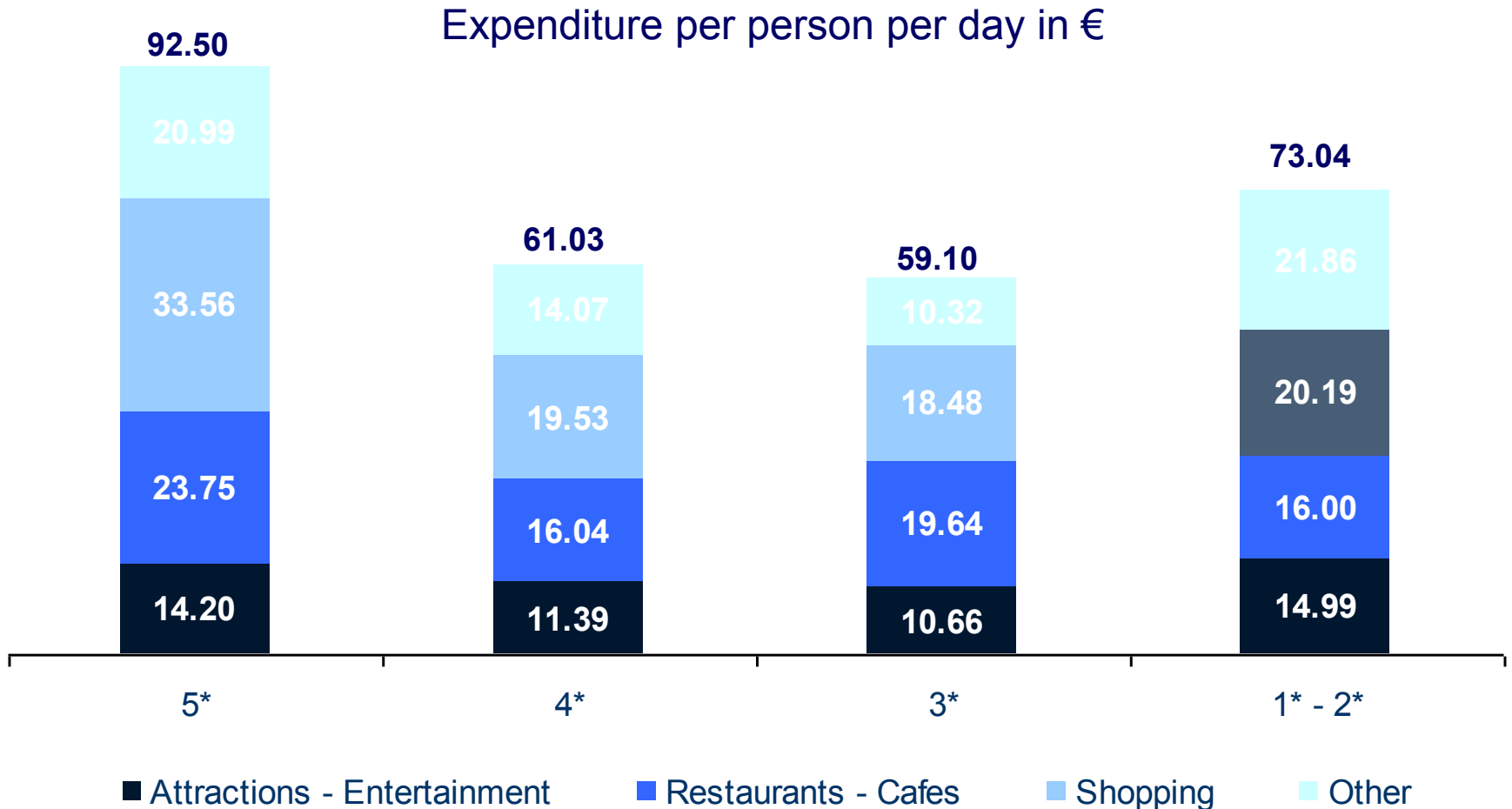


# Comparisons

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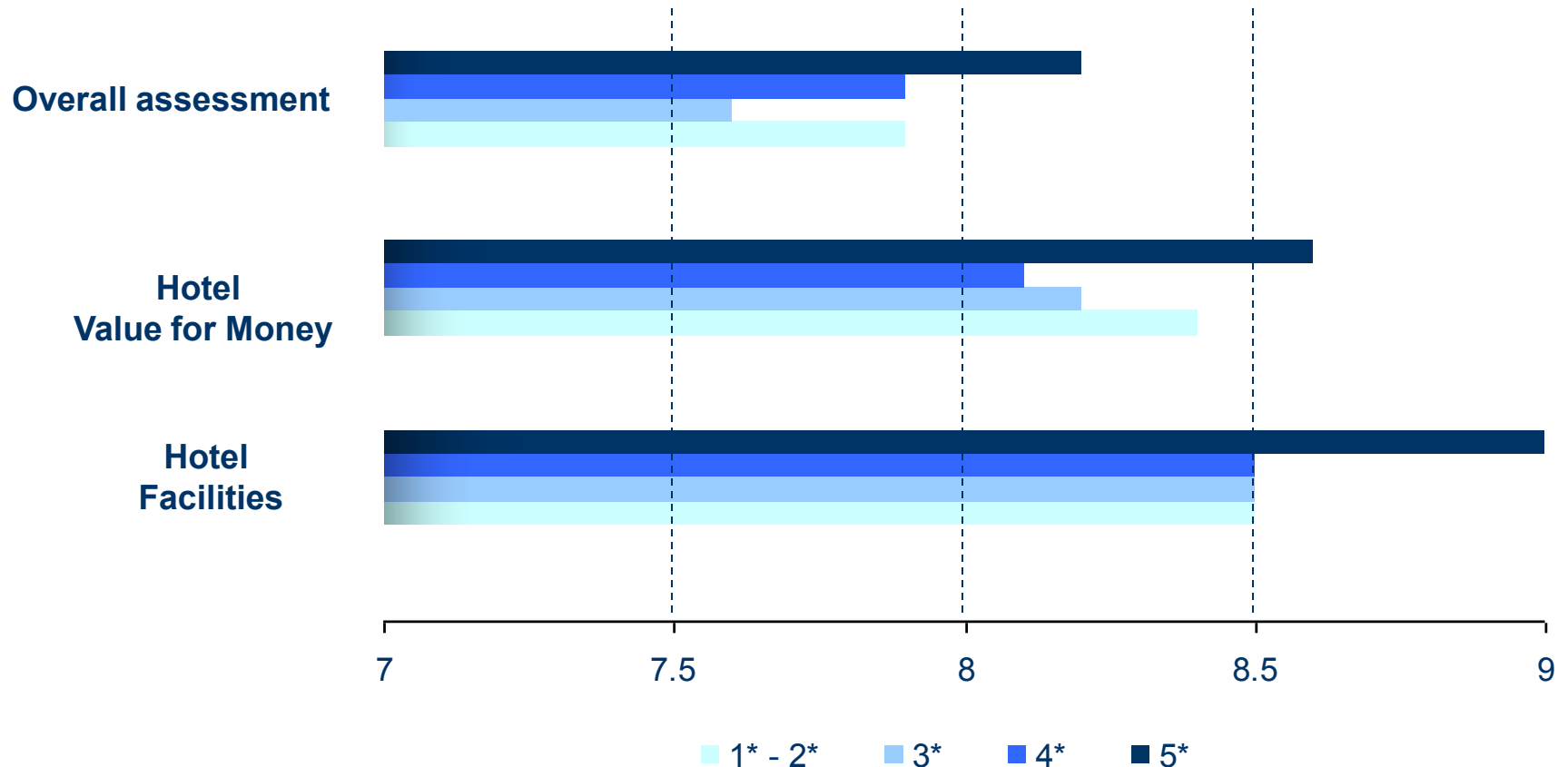


# Comparison expenditure between 5\*, 4\* & 3\* guests



As expected the 5 star guests are spending the most per person per day in the city, especially on shopping and restaurants. The guests staying at 1 and 2 star hotels come second in terms of spending. Apparently, these guests are economising on the accommodation, but spent these savings in the city.

# Hotel evaluation regarding the hotel category 5\*, 4\* & 3\*



The 5 star guests are most satisfied, considering their overall assessment mark of 8.2. Their satisfaction is also evident for the hotel facilities. With a mark of 9.0 they value the hotel facilities clearly very high. Same applies for Hotel – Value for money. The lowest overall assessment mark – but still 7.6 – was given by the 3 star hotel guests.

# Comparison between Greek & Foreigners



	Greeks	Foreigners
Time visited (largest group):	40% more than 4x	41% first time
Length of stay:	2.8 nights	4.3 nights
If leisure, why Thessaloniki?	Personality city: 63% Commercial centre: 46%	Personality city: 54% Archaeological sites: 54%
Online booking:	30%	53%
Decision for Thessaloniki:	3 – 5 days before	More than 14 days before
Transportation:	57% by car	63% by plane
Access to Thessaloniki convenient?	Yes: 80%	Yes: 91%

# Comparison between Greek & Foreigners

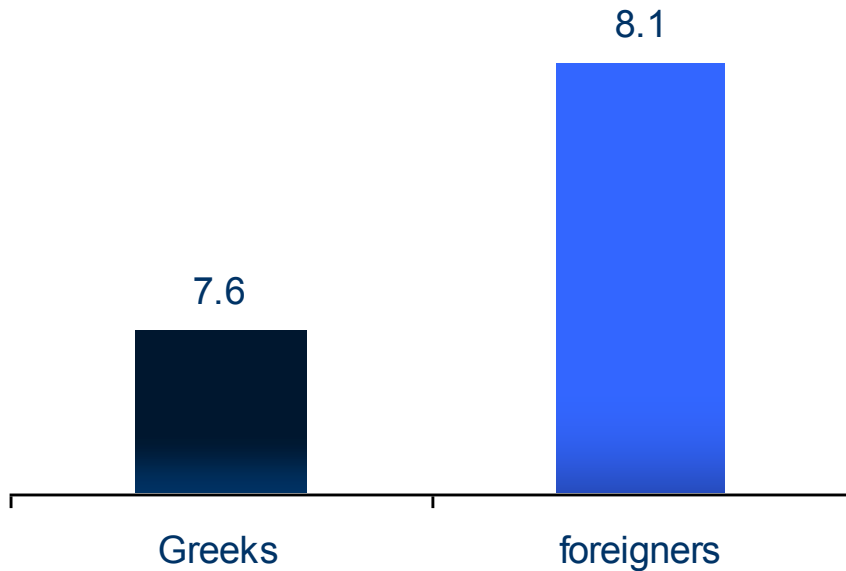
## Expenditure per person per day

	Greeks	Foreigners
Attractions & Entertainment	€ 13.15	€ 11.76
Restaurants & cafes	€ 16.89	€ 19.16
Shopping	€ 21.75	€ 23.26
Other	€ 16.54	€ 14.58
<b>Total</b>	<b>€ 68.34</b>	<b>€ 68.76</b>

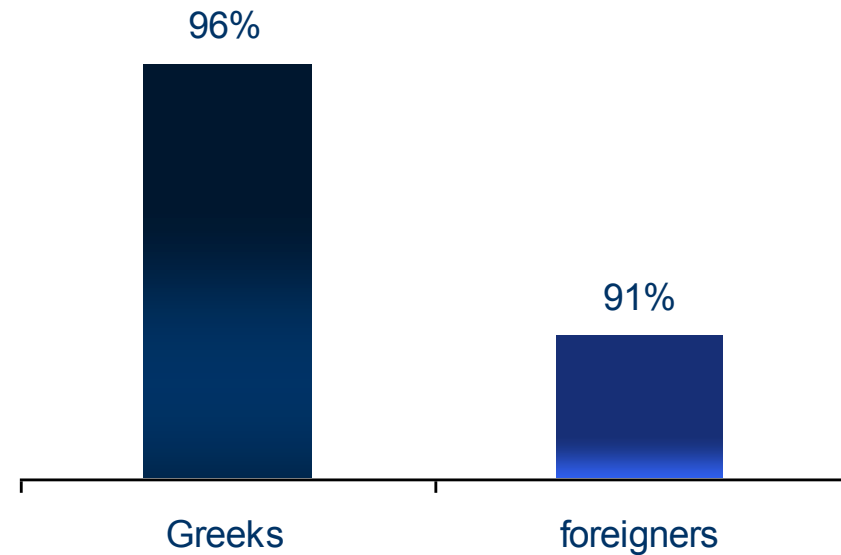
The expenditure of the Greeks and the foreign guests is remarkably similar, although one should take into account the longer stay of the foreigners.

# Comparison between Greek & Foreigners

Overall assessment



Recommendation

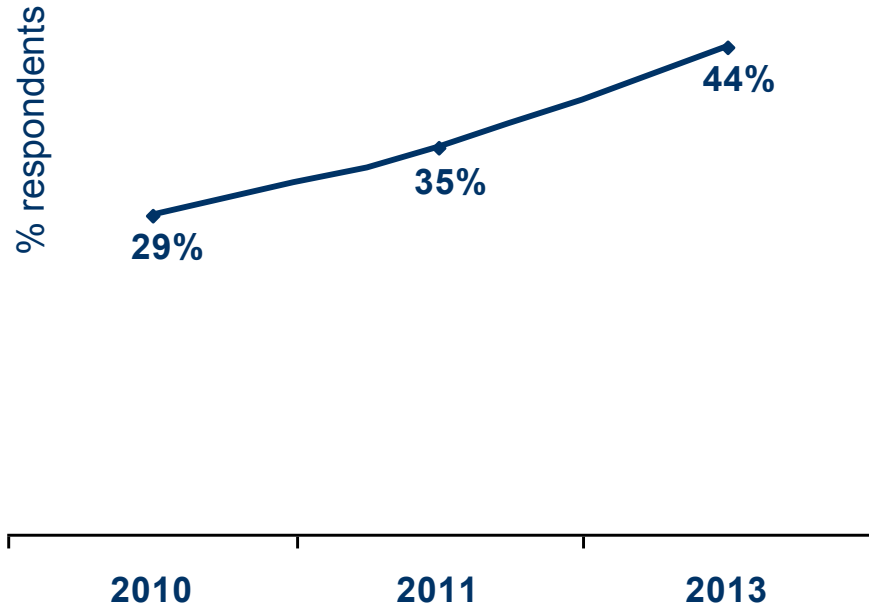


The foreigners have given Thessaloniki a higher overall assessment mark than the Greeks, but the Greeks have a higher recommendation percentage than the foreigners.

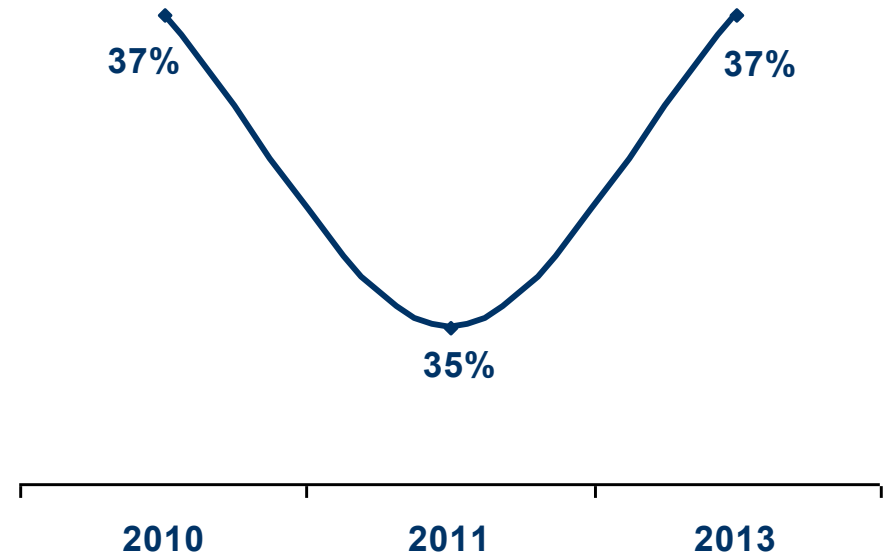
# Time series

## Online booking & trip preparation

% that booked online



Trip preparation through word of mouth



The number of visitors that book online is steadily increasing from 29% in 2010 to 44% this year.

Word of mouth remains the most important form to prepare the trip to Thessaloniki.

# Time series Assessment & recommendation

## Assessment

### Hotel Facilities



### Hotel Value for Money



### Overall Assessment



2010

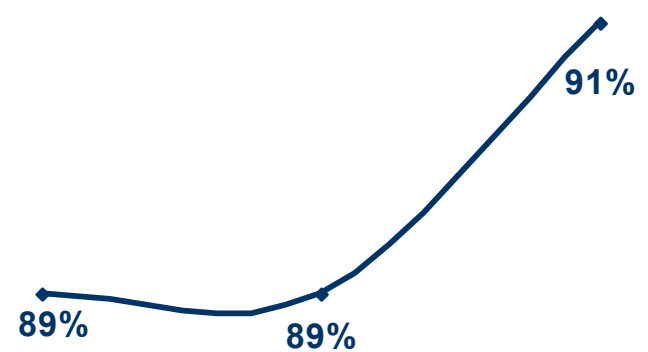
2011

2013

Scale 1 - 10

## % that would recommend Thessaloniki

% respondents



2010

2011

2013

Evaluations of Thessaloniki hotels has remained at a very high level throughout the years the survey was conducted and is valued higher than the overall assessment of the city, which has also remained stable at a satisfactorily level. The percentage of people that would recommend Thessaloniki to friends and relatives reached a record level of 91% this year, up from 89% in both 2010 and 2011.



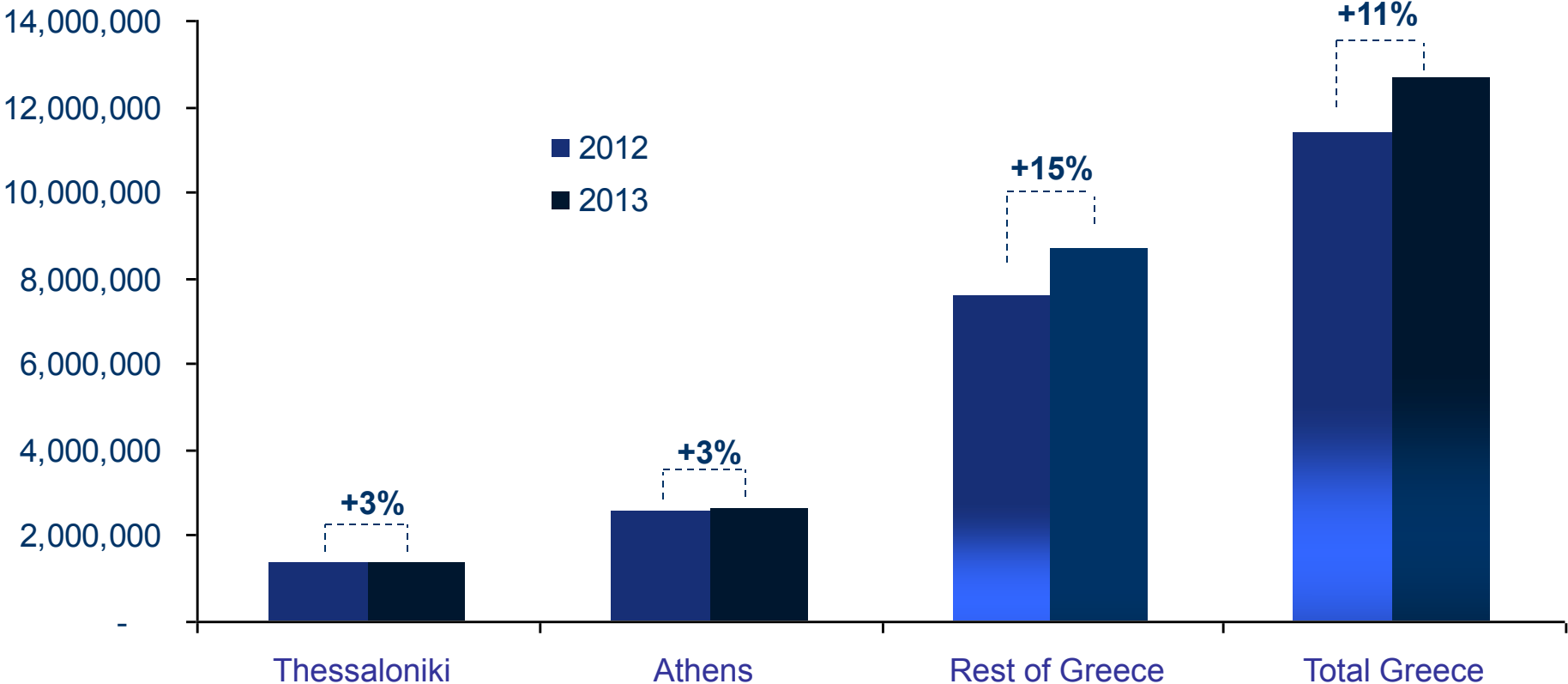
The background image shows a modern architectural installation at dusk. It features a series of tall, thin, dark poles that support a grid of large, translucent umbrellas. The umbrellas are illuminated from within, casting a warm, golden glow. Two men in business attire are visible in the lower left, standing on a platform. The sky is a deep blue, and a body of water is visible in the distance. The overall scene is artistic and contemporary.

Performance

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# International Tourists Arrivals

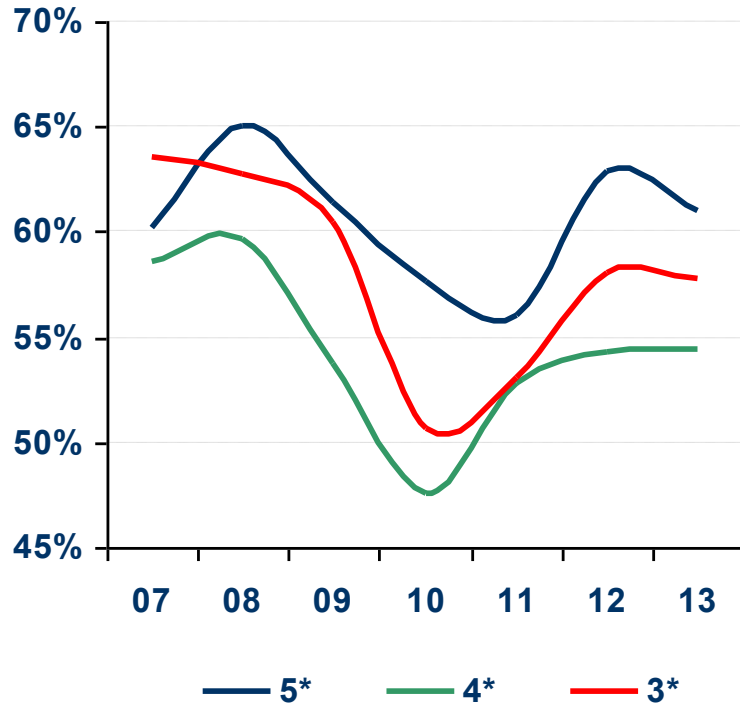
International Tourist Arrivals at main airports  
YTD Dec 2012 / 2013



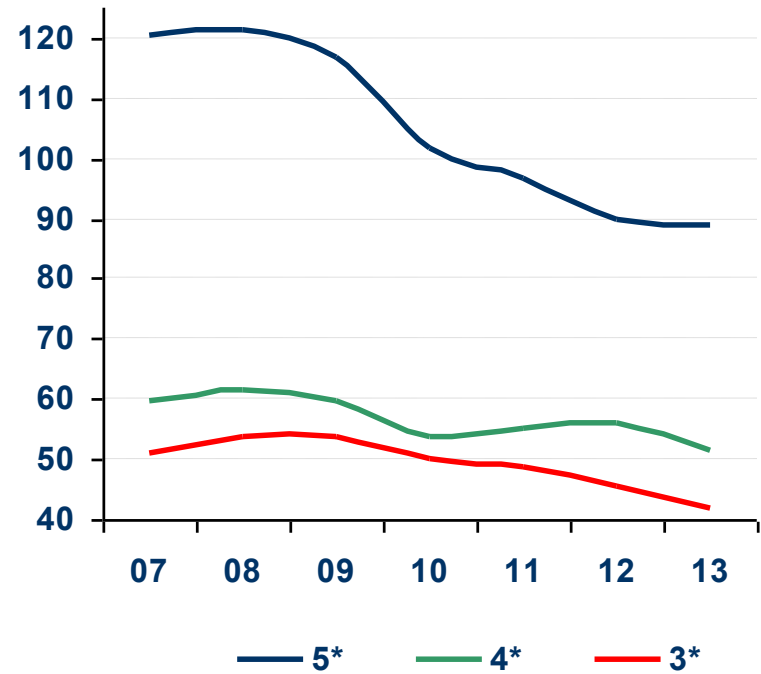
Source: SETE

# Performance 2007 - 2013

### Occupancy (%)



### ARR (€)

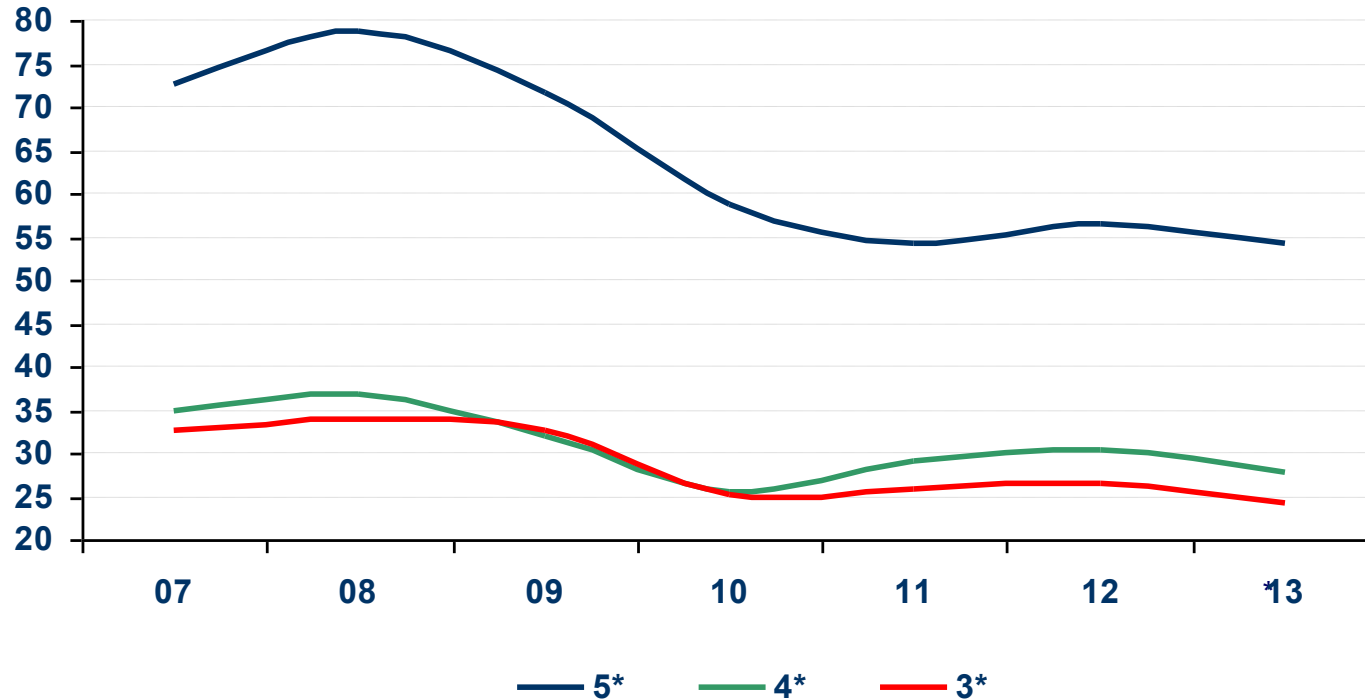


Source: EXTHES on the basis of 28 hotels, analysis by GBR Consulting

On the basis of 28 hotels participating in the survey throughout 2007 – 2013, the occupancy level bottomed out in 2011/12 and improved significantly afterwards mainly due the health recovery program of Libyans. The ARR shows though a falling trends throughout the period of 2007 - 2013

# Performance 2007 - 2013

RevPAR (€)

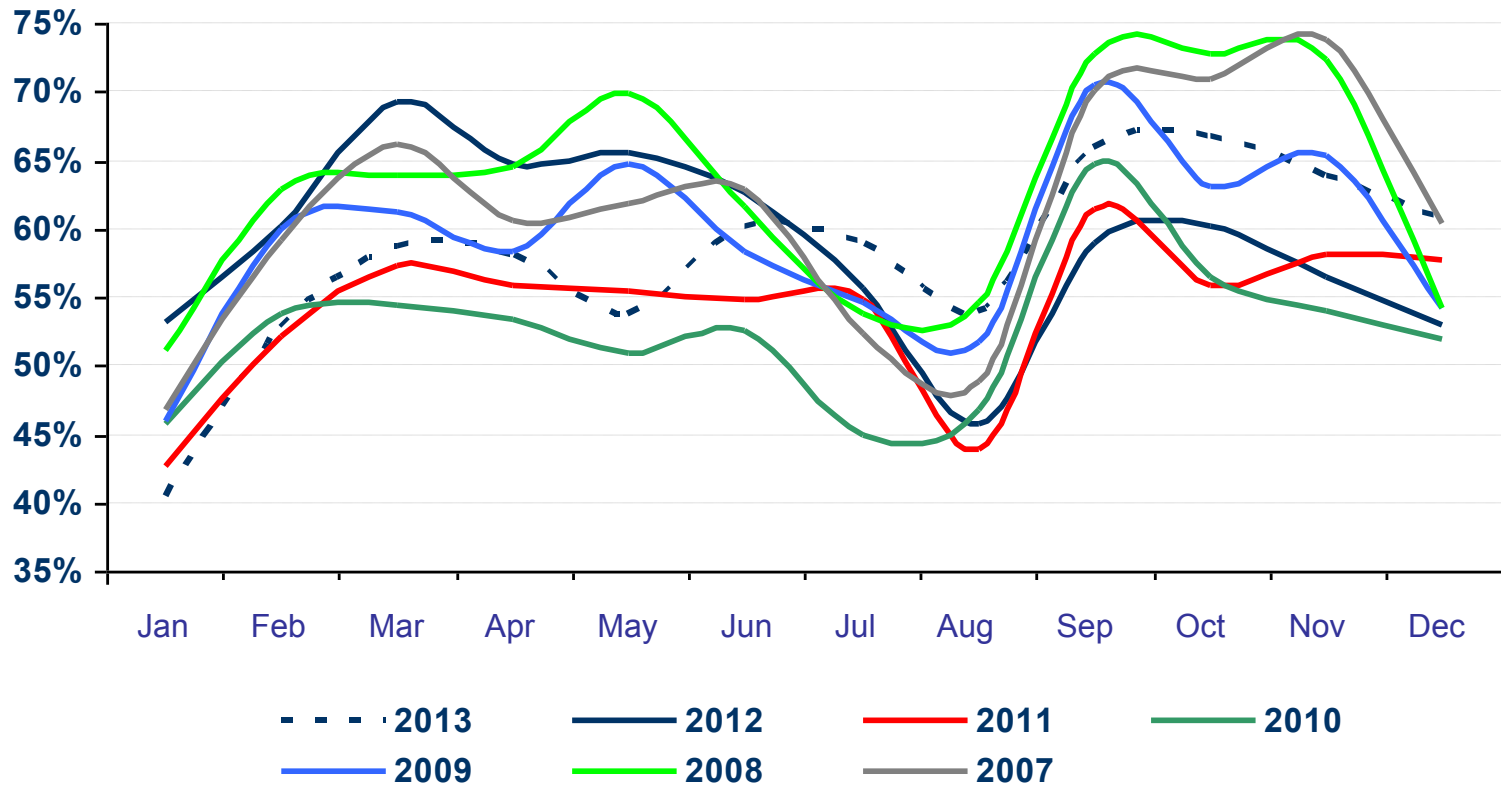


Source: EXTHES on the basis of 28 hotels, analysis by GBR Consulting

On the basis of the 28 hotels participating in the survey throughout the period of 2007 – 2013, it becomes evident in the above RevPAR chart that the Thessaloniki hotel sector has not found its way up again to 2007 and 2008 levels, even though a slight improvement was noticed in 2011 and 2012 due to the Libyan health recovery program.

# Performance 2007 – 2013, seasonality

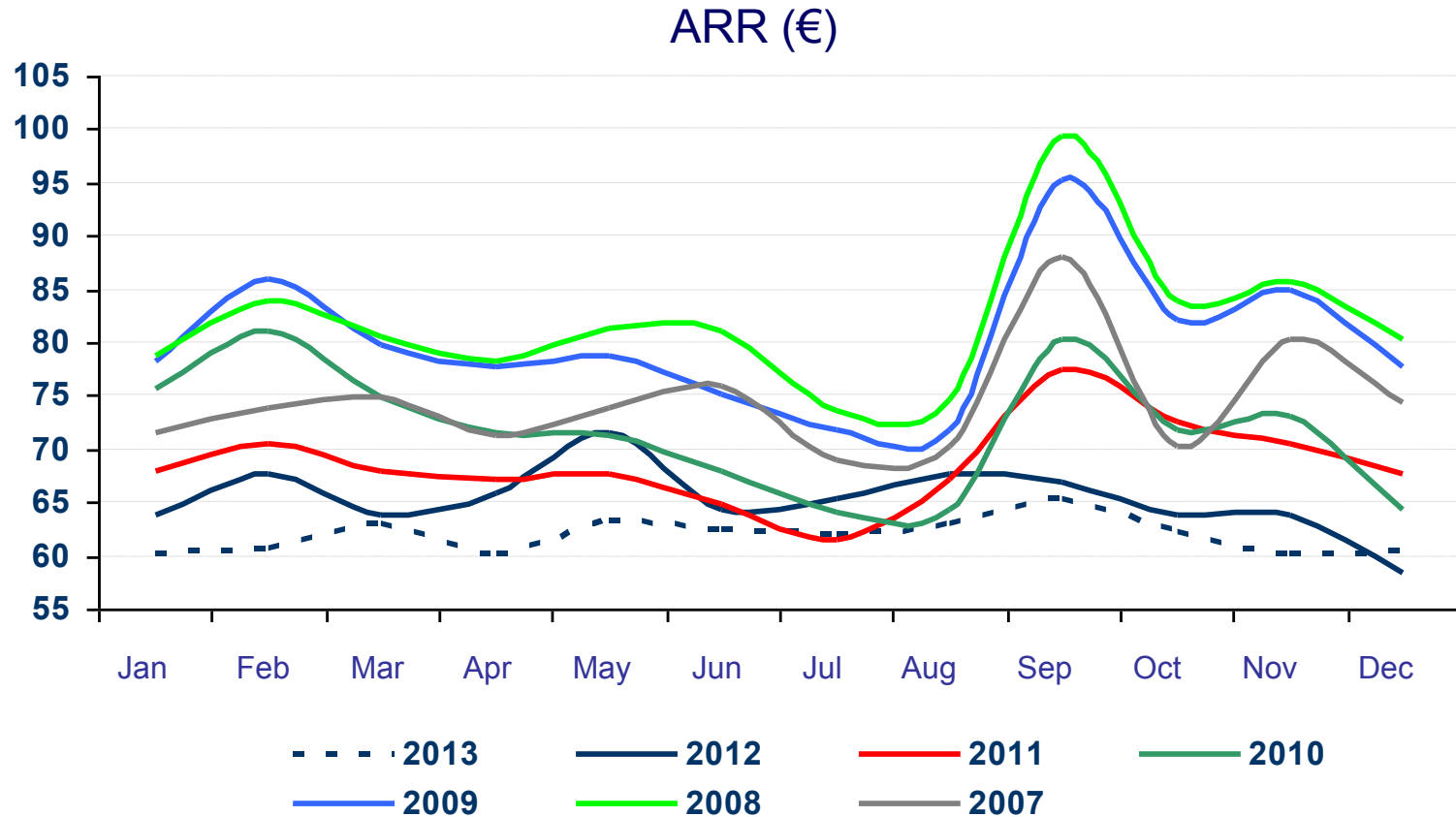
## Occupancy



Source: EXTHES on the basis of 28 hotels, analysis by GBR Consulting

Occupancy shows throughout the period 2007- 2013 a similar trends albeit on different levels. The months January and August show the lowest occupancy levels, while September is the highest due to the the annual Thessaloniki International Fair (TIF). Finally, 2013 shows some recovery in terms of occupancy, especially after June.

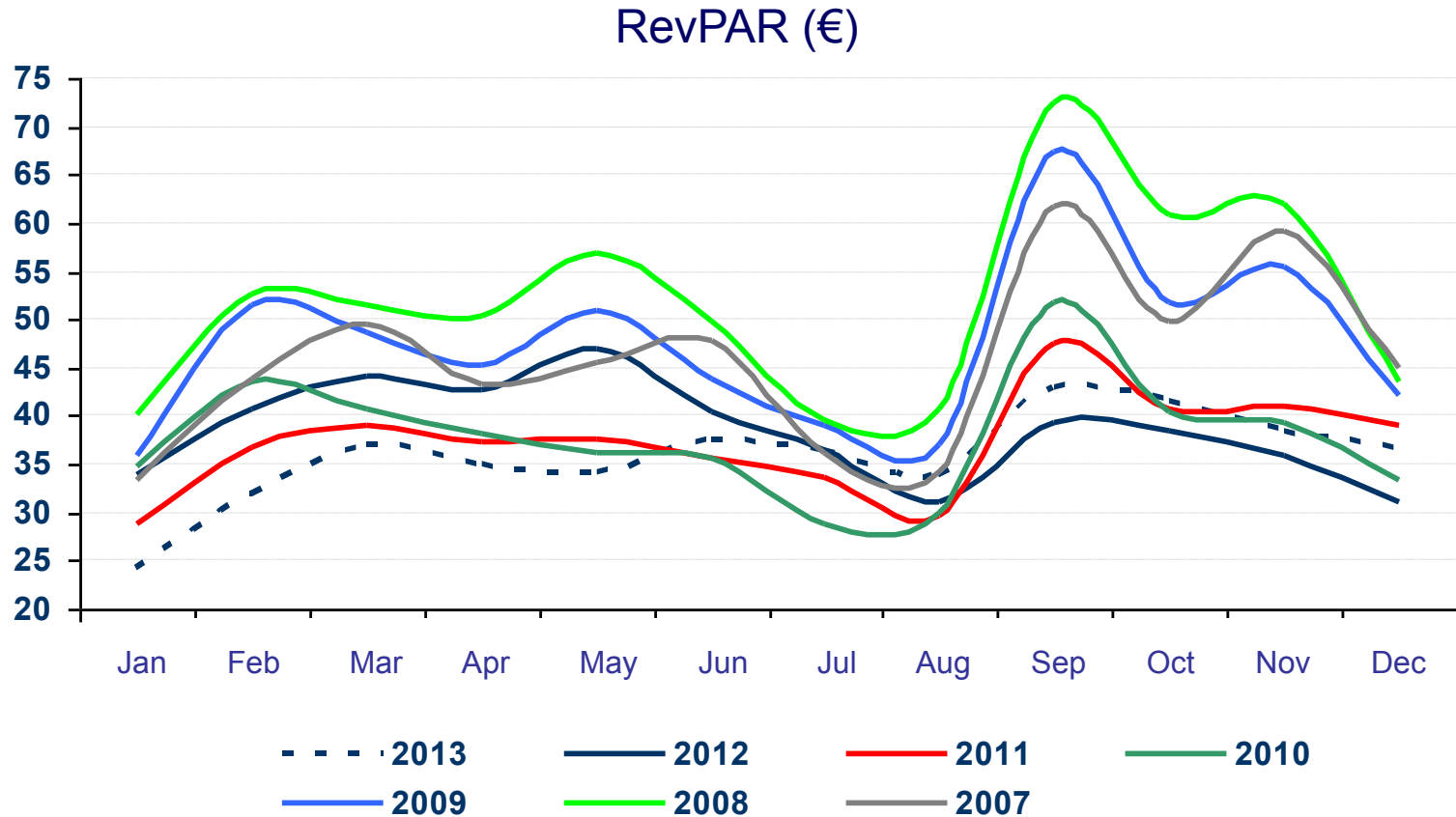
# Performance 2007 – 2013, seasonality



Source: EXTHES on the basis of 28 hotels, analysis by GBR Consulting

The room rates are this year of the lowest level since 2007 throughout the year. The diagramme clearly shows that 2008 and 2009 the highest rates were achieved. Finally, it is also evident that even in September rates did not show a peak in 2013 and 2012.

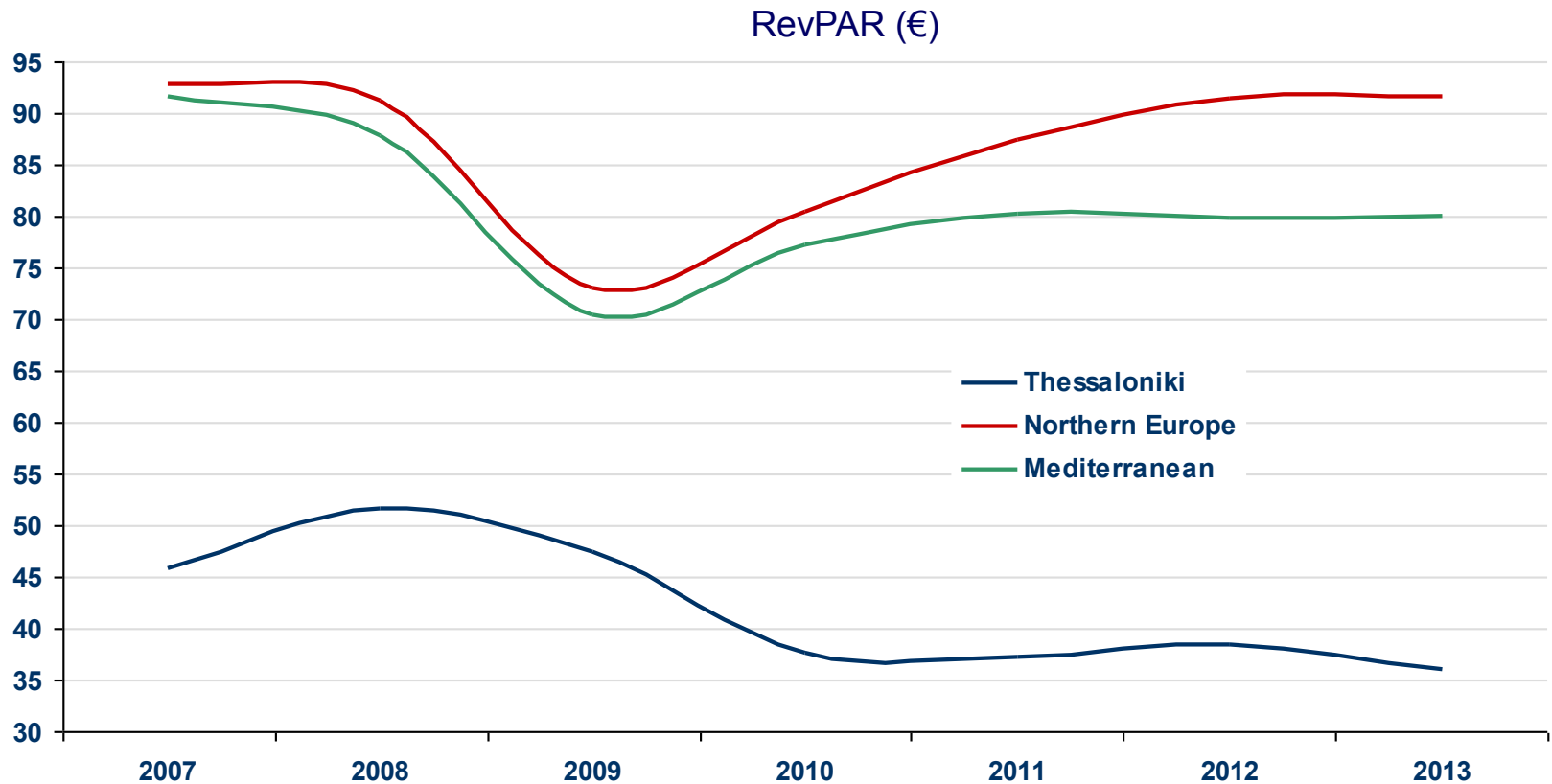
# Performance 2007 – 2013, seasonality



Source: EXTHES on the basis of 28 hotels, analysis by GBR Consulting

The RevPAR in 2013 follows the trend of 2011 and 2010 as the occupancy is recovering, but the room rates stay behind. Throughout the year the RevPAR is at a significantly lower level than the years 2007 - 2009

# Thessaloniki vs Europe 2007 - 2013



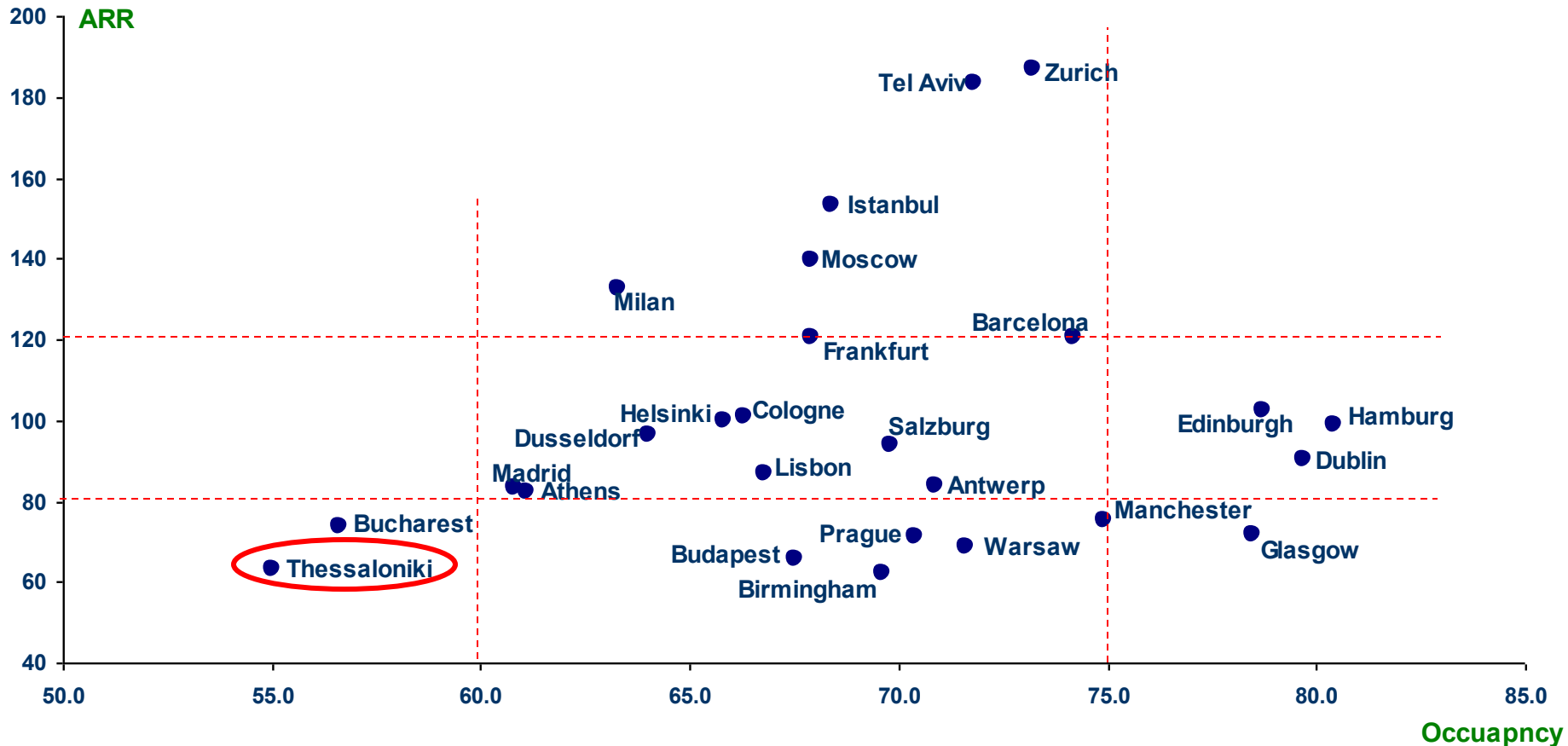
Source: STR Global 17 N. European cities & 6 S. European cities, EXTHES on the basis of 28 hotels, analysis by GBR Consulting

Even though Southern Europe consists of the major cities of Barcelona, Istanbul, Lisbon, Madrid, Milan and Rome we may nevertheless conclude in terms of trend that Southern Europe started its recovery in 2010 and 2011, while Thessaloniki saw a significant drop in 2010, after which it stabilised.



# Performance of major European cities

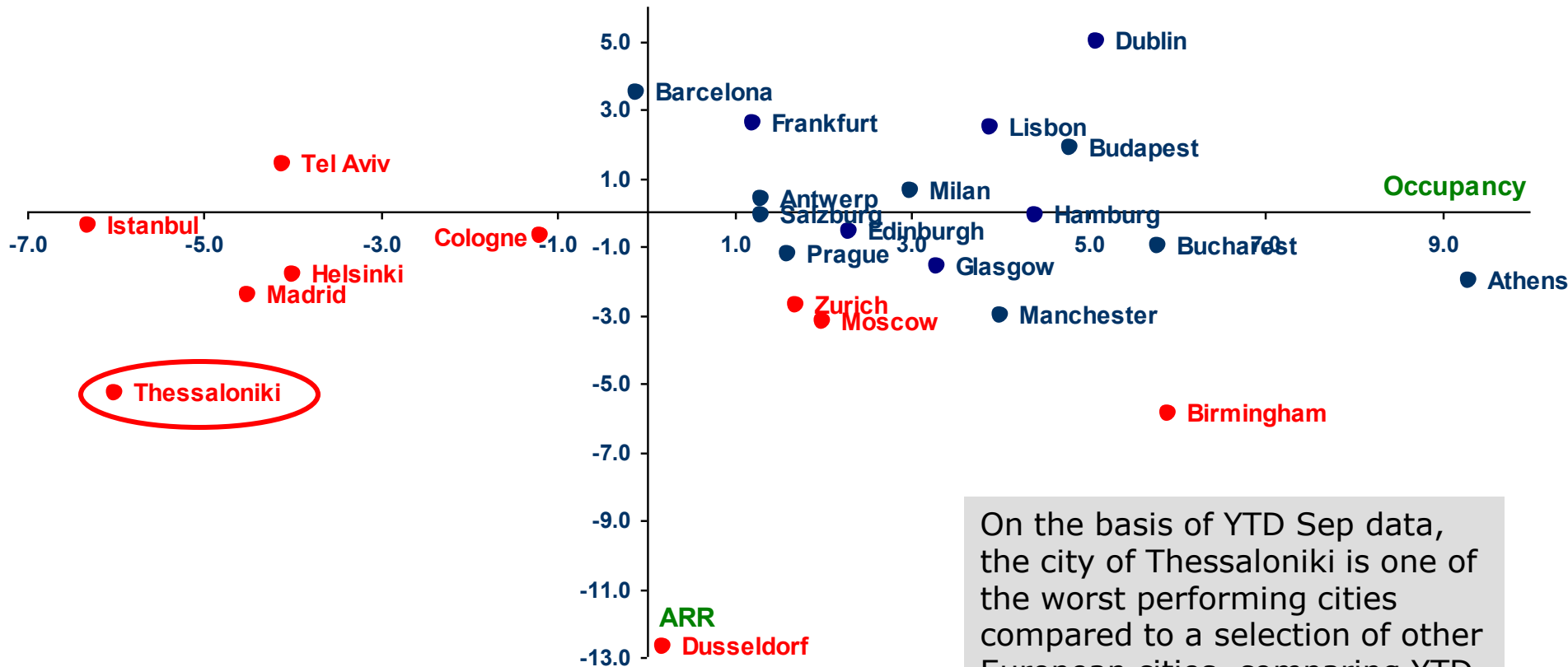
Occupancy and ARR of major European cities  
YTD September 2013



Together with Bucharest, Thessaloniki has the lowest ARR and occupancy levels, compared to a selection of European cities.

# Performance of major European cities

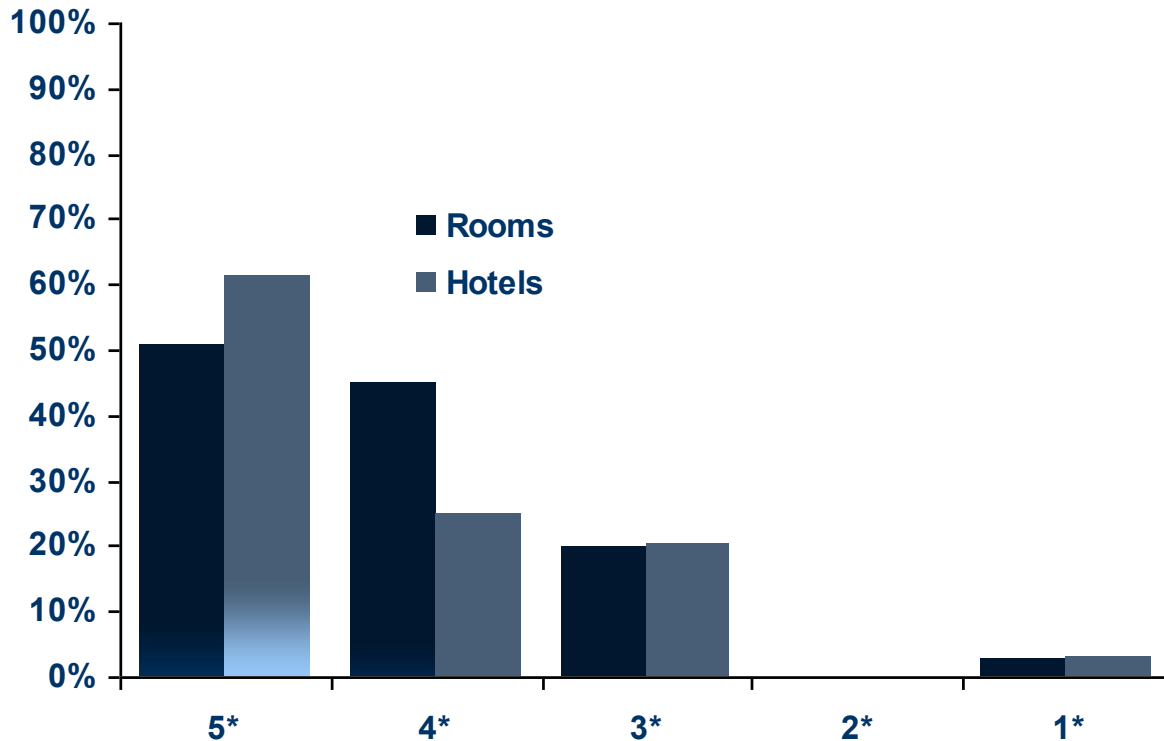
## Occupancy and ARR of major European cities YTD September change 2013/2012



On the basis of YTD Sep data, the city of Thessaloniki is one of the worst performing cities compared to a selection of other European cities, comparing YTD Occupancy and ARR of 2013 with 2012.

# Hotel Branding in Thessaloniki (prefecture)

% of total hotels / rooms in Thessaloniki (prefecture) that carry an international, national or local brand, or is participating in a marketing consortium



16% of hotels is branded

28% of hotel rooms is branded

2 hotels carry an international brand

9 hotels carry a national brand



Thank you!



Dr. Aris Ikkos