

14th Tourist Satisfaction
Survey
&
Performance of the
Athens Hotel Sector

2018

gbr
consulting




Survey characteristics

- ▶ Methodology: questionnaire
- ▶ Sample: ~ 1,450 questionnaires
- ▶ Collected in the period July – September

With the support of:



Members of Athens Attica & Argosaronic Association hotels 2* - 5*



Demand Characteristics

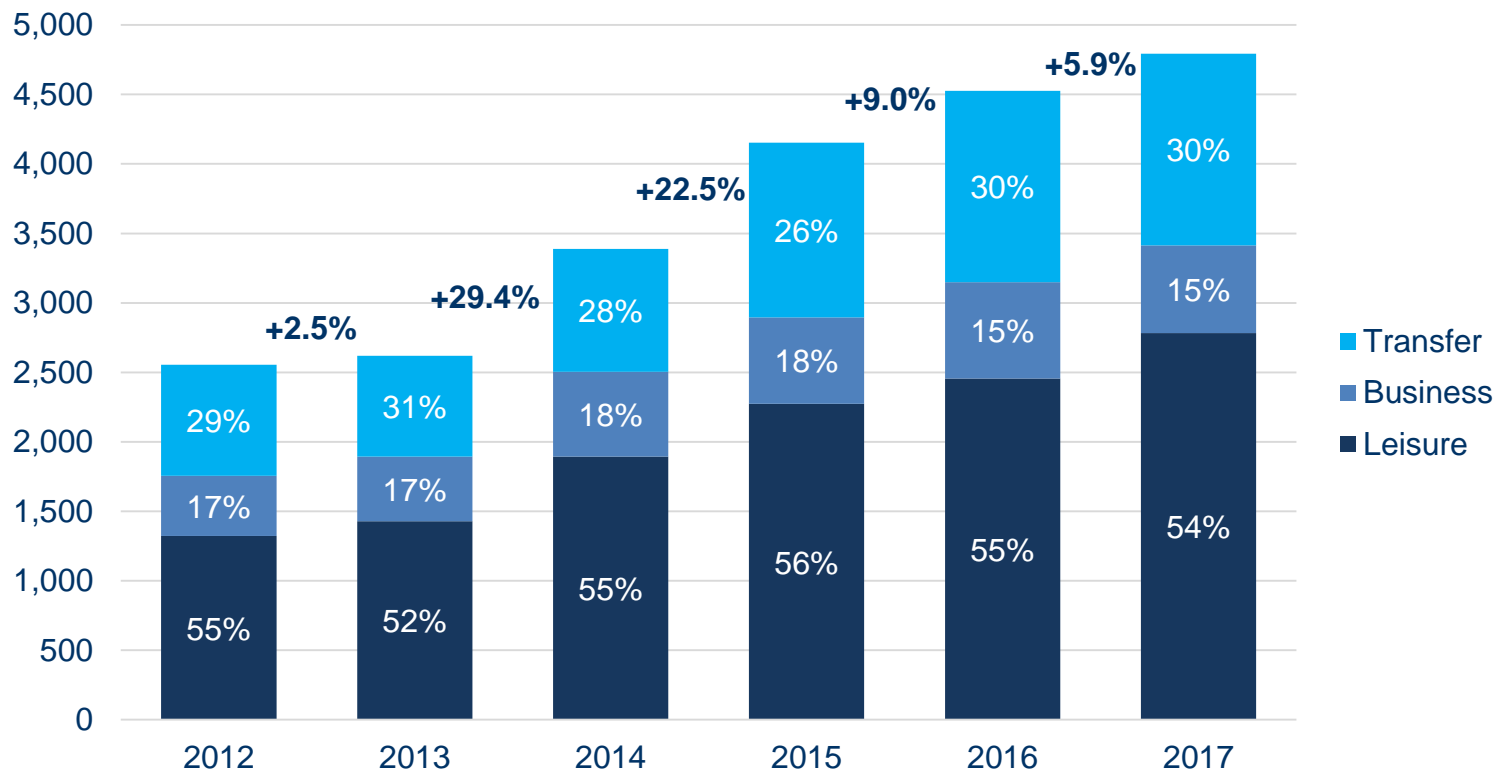
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Athens International Airport

Development of international arrivals by purpose

International arrivals of foreign residents at AIA by purpose (x 1,000)

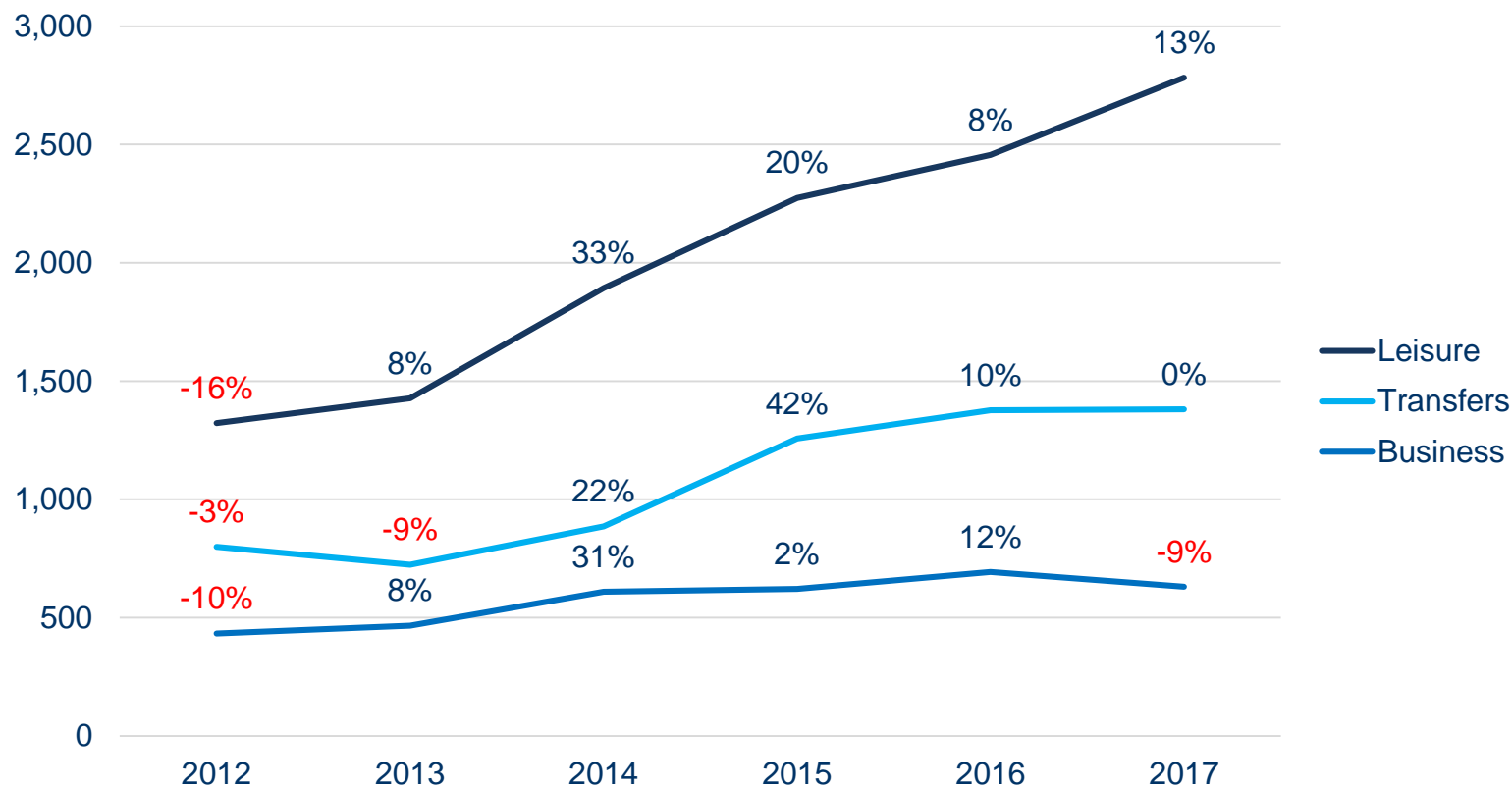


Source: Athens International Airport, analysis by GBR Consulting

Athens International Airport

Development of international arrivals by purpose

International arrivals of foreign residents at AIA by purpose (x 1,000) and percentage growth

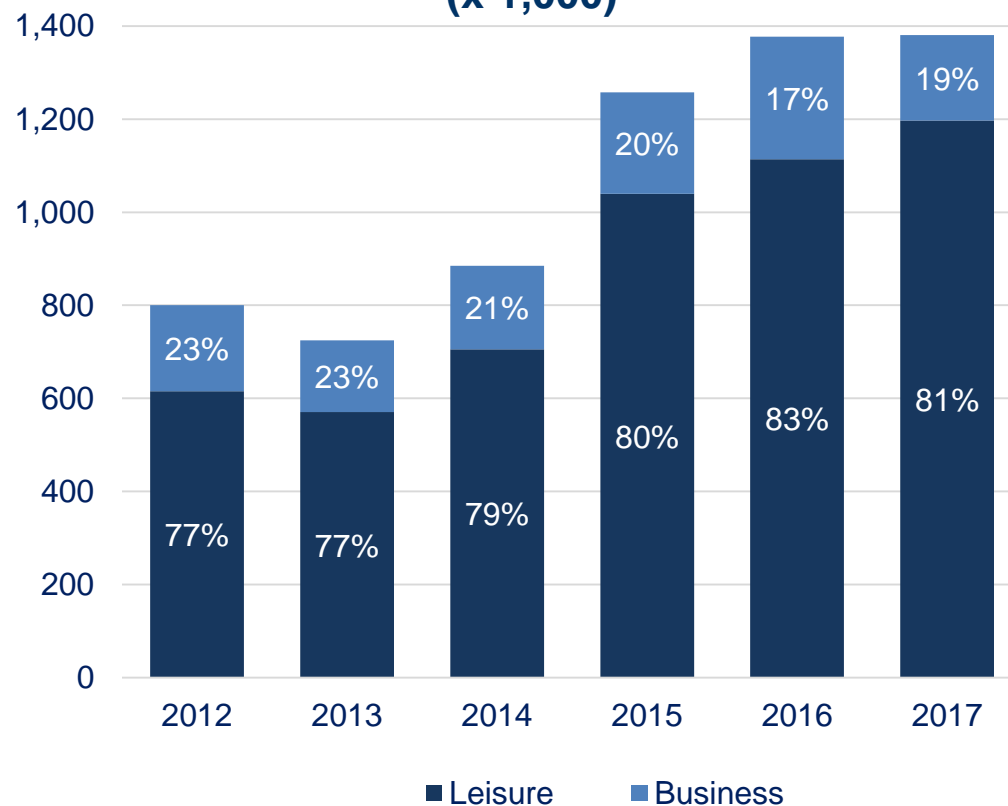


Source: Athens International Airport, analysis by GBR Consulting

Athens International Airport

Transfer upon arrival by purpose

International arrivals of foreign residents at AIA by purpose who transferred to other domestic destinations (x 1,000)



Main leisure transfer destinations	2017	Δ 2017/16
Santorini	286,853	19%
Mykonos	121,996	-3%
Thessaloniki	91,946	1%
Heraklion	90,270	8%
Chania	89,672	24%
Rhodes	87,277	10%

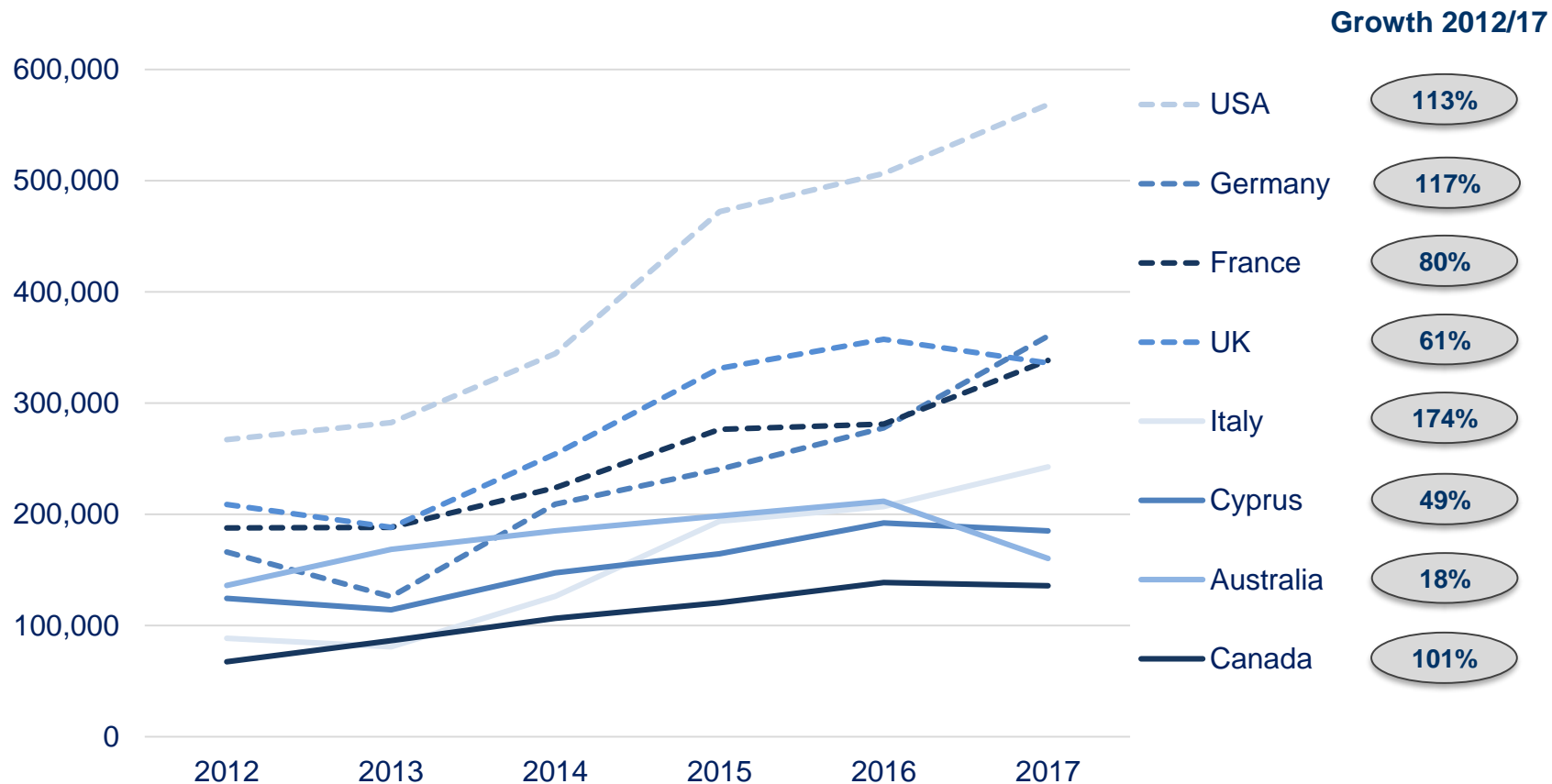
Main business transfer destinations	2017	Δ 2017/16
Thessaloniki	35,950	-11%
Heraklion	27,379	-22%
Mitilini	13,699	-37%
Mykonos	13,699	26%
Chania	13,699	-73%
Rhodes	11,116	-41%

Source: Athens International Airport, analysis by GBR Consulting

Athens International Airport

Development of major international source markets

International arrivals of foreign leisure residents by major source country and percentage growth 2012/2017



Source: Athens International Airport, analysis by GBR Consulting

Athens International Airport

Highest growth leisure & main business source markets

Leisure: Highest growth of incoming traffic in 2017

Country	Arrivals	Δ 2017/16
Belgium	94,329	51%
Israel	93,931	52%
Russia	89,553	43%
Ukraine	40,597	70%
China	40,199	63%
Serbia	25,075	71%

Business: Major international source markets in 2017

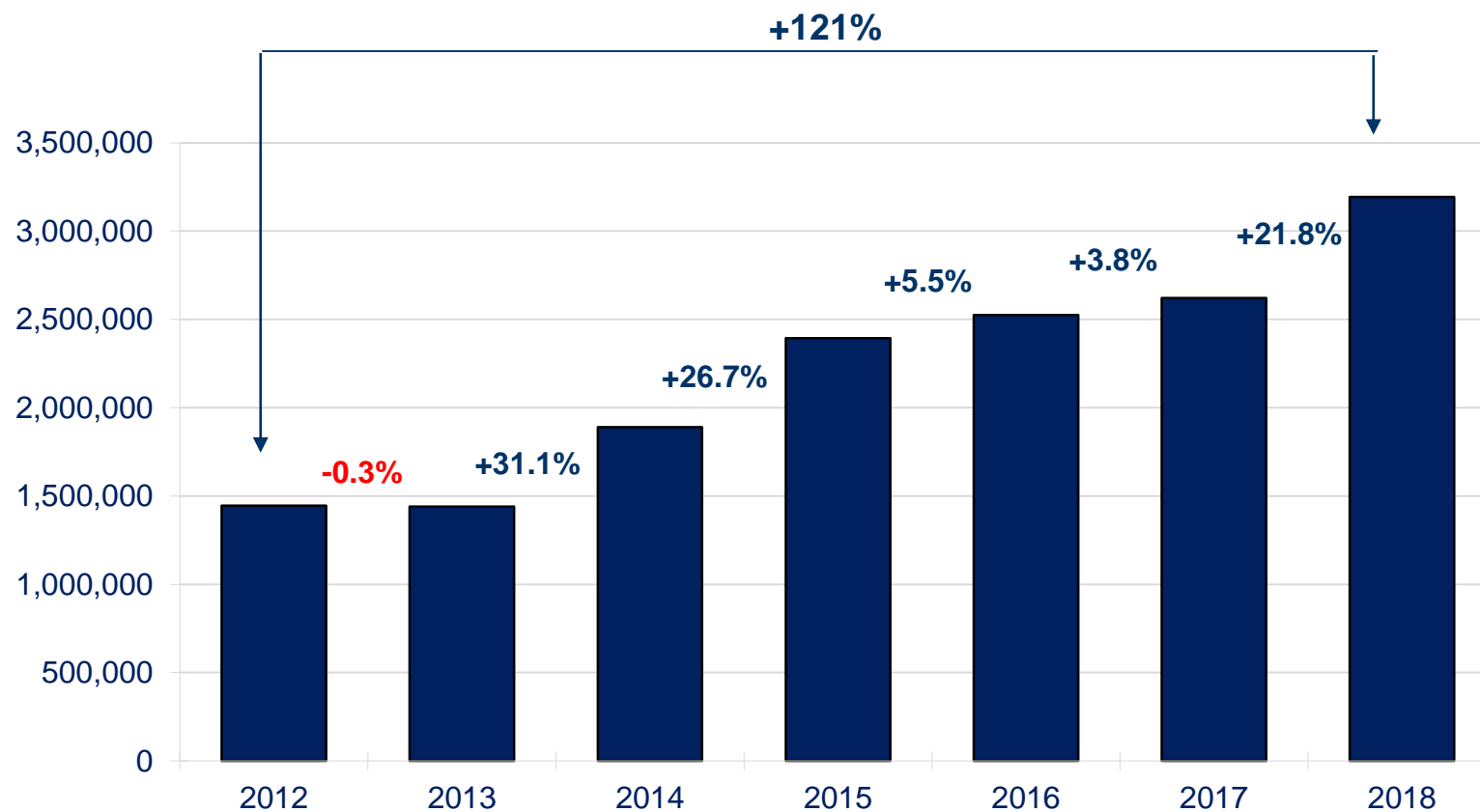
Country	Arrivals	Δ 2017/16
Cyprus	93,726	11%
UK	75,419	-9%
Italy	73,874	-12%
Germany	67,121	-18%
United States	46,456	-20%
France	40,435	-35%

Source: Athens International Airport, analysis by GBR Consulting

Athens International Airport

International arrivals - YTD Jul 2012 - 2018

Total international arrivals of foreign residents and percentage growth

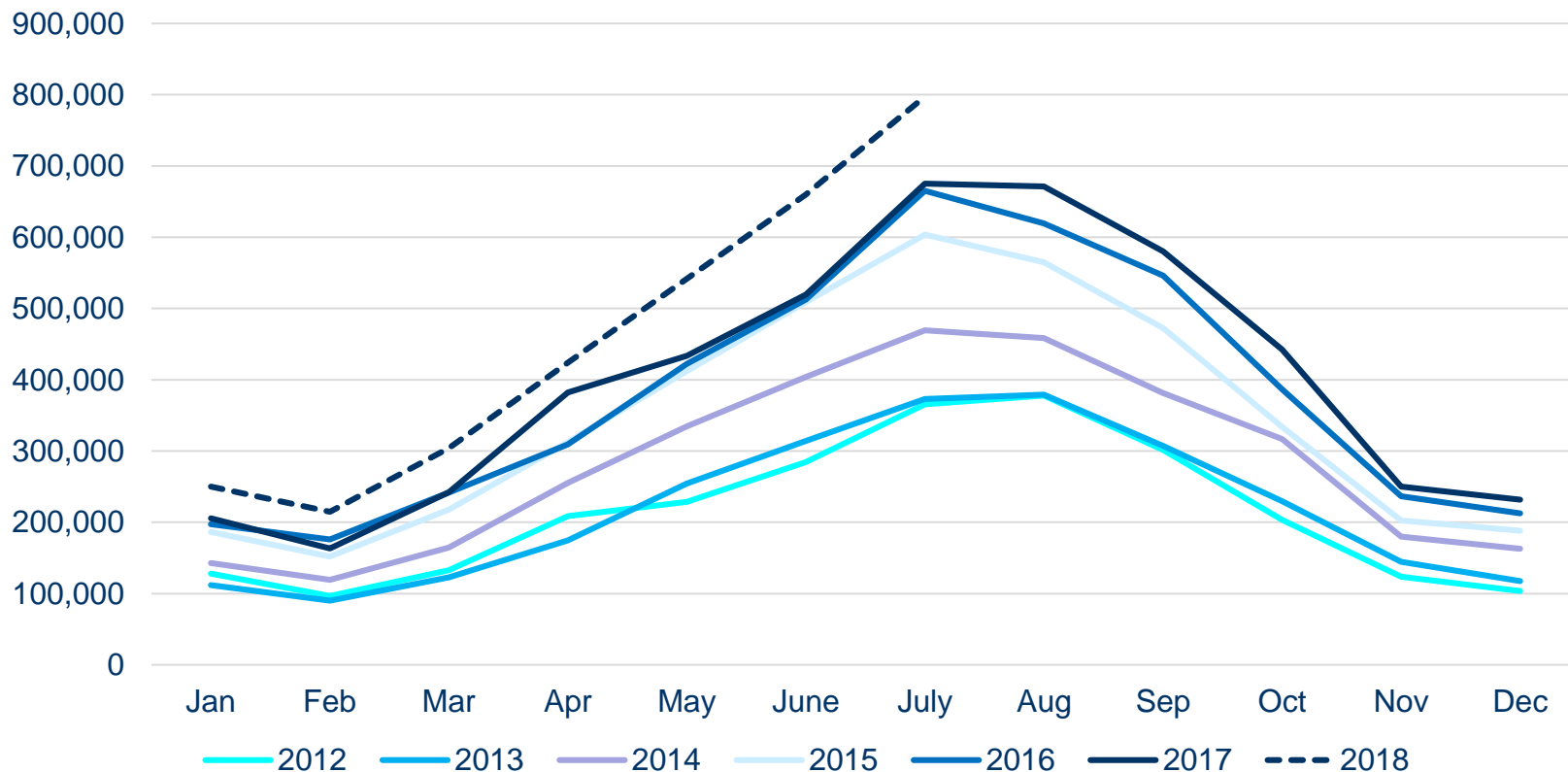


Source: SETE, analysis by GBR Consulting

Athens International Airport

Seasonality – international arrivals per month

Total international arrivals of foreign residents per month, 2012 - 2018

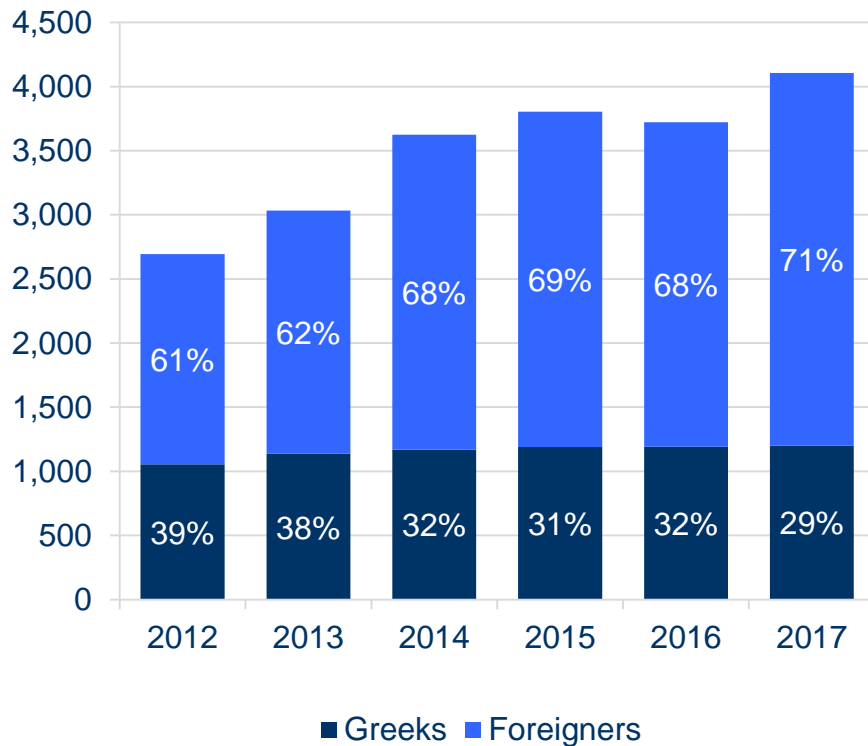


Source: SETE, analysis by GBR Consulting

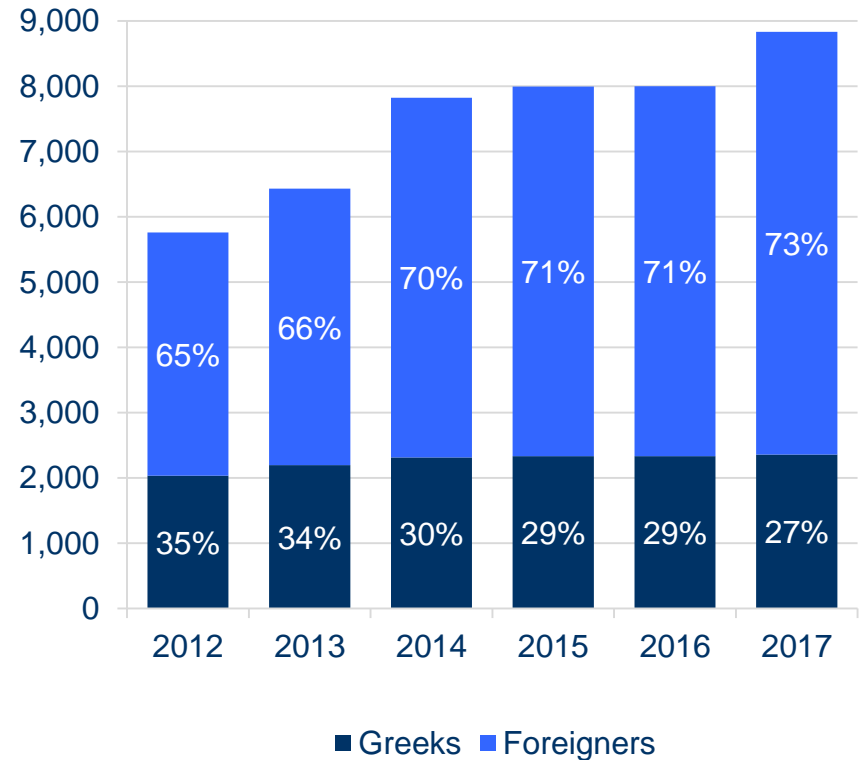
Hotel demand

Arrivals & overnight stays at hotels in Attica

Arrivals (x 1,000)



Overnights (x 1,000)



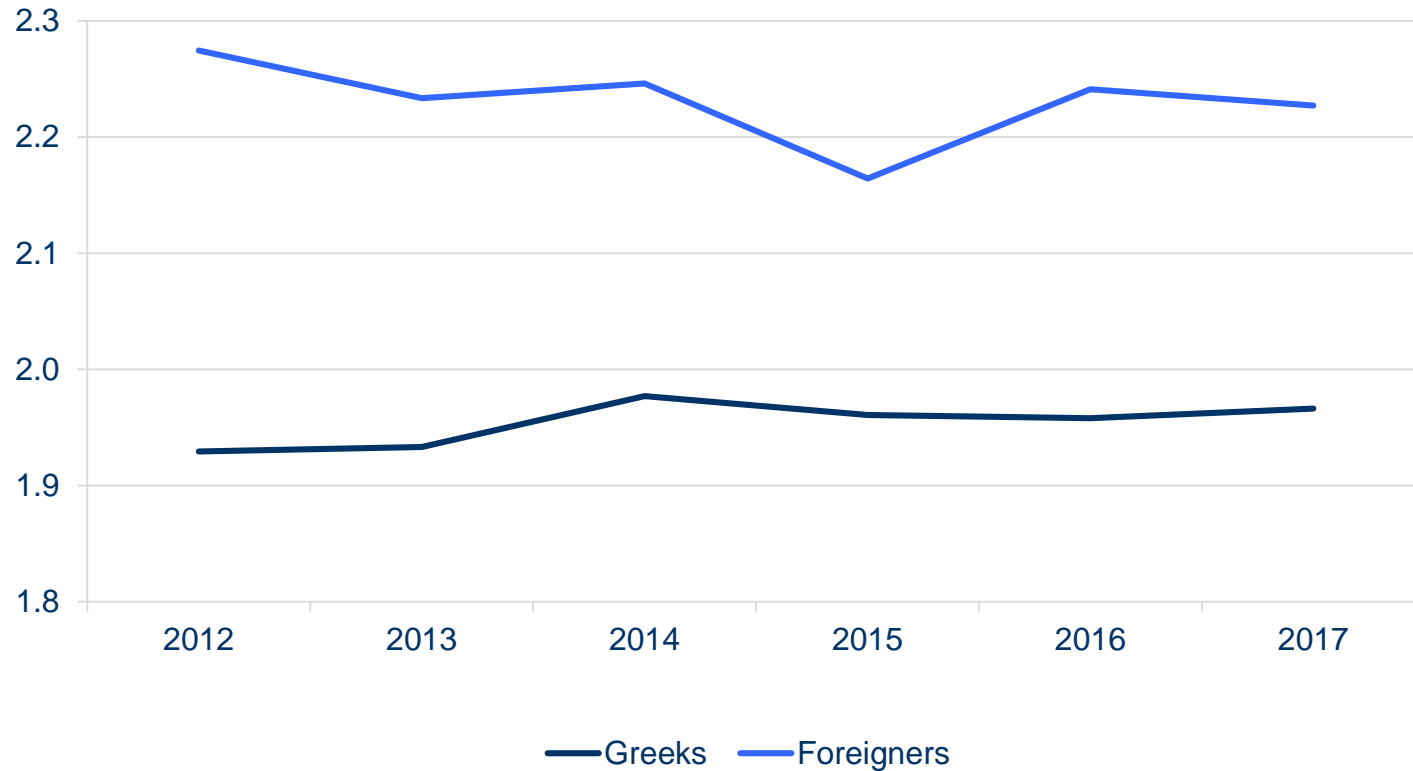
Source: Hellenic Statistical Authority



Hotel demand

Length of stay at Attica hotels

Length of stay



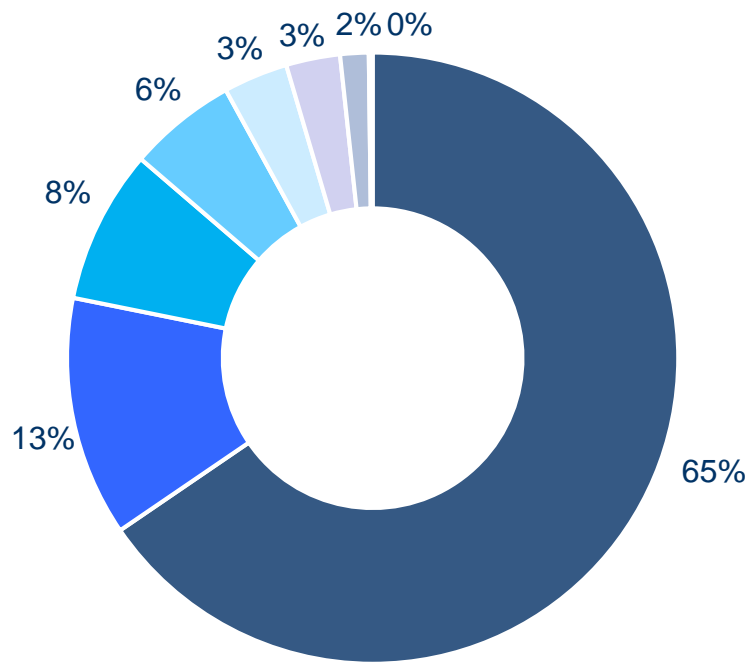
Source: Hellenic Statistical Authority



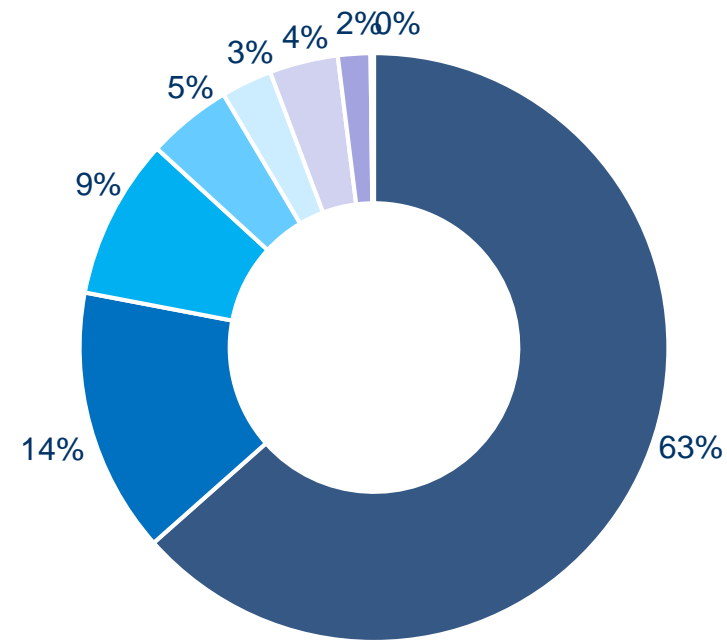
Hotel demand

Arrivals & overnight stays per area (2017)

Arrivals



Overnights



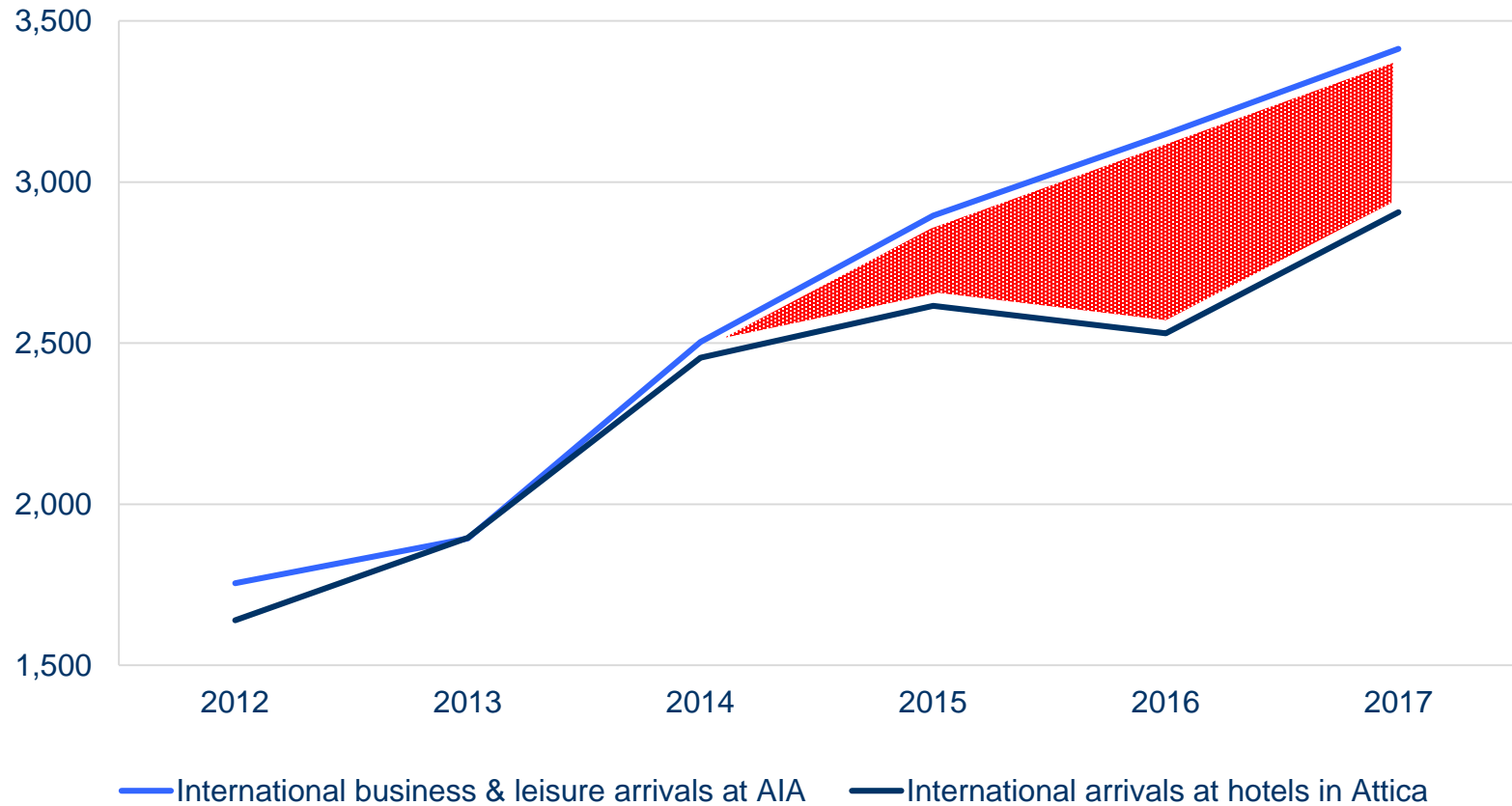
Source: Hellenic Statistical Authority



Hotel demand

International arrivals at AIA vs arrivals at hotels

**International arrivals at AIA (leisure & business)
vs arrivals of foreigners at hotels (x 1,000)**



Source: Athens International Airport, Hellenic Statistics Federation, analysis by GBR Consulting





Profile & Tourist Satisfaction

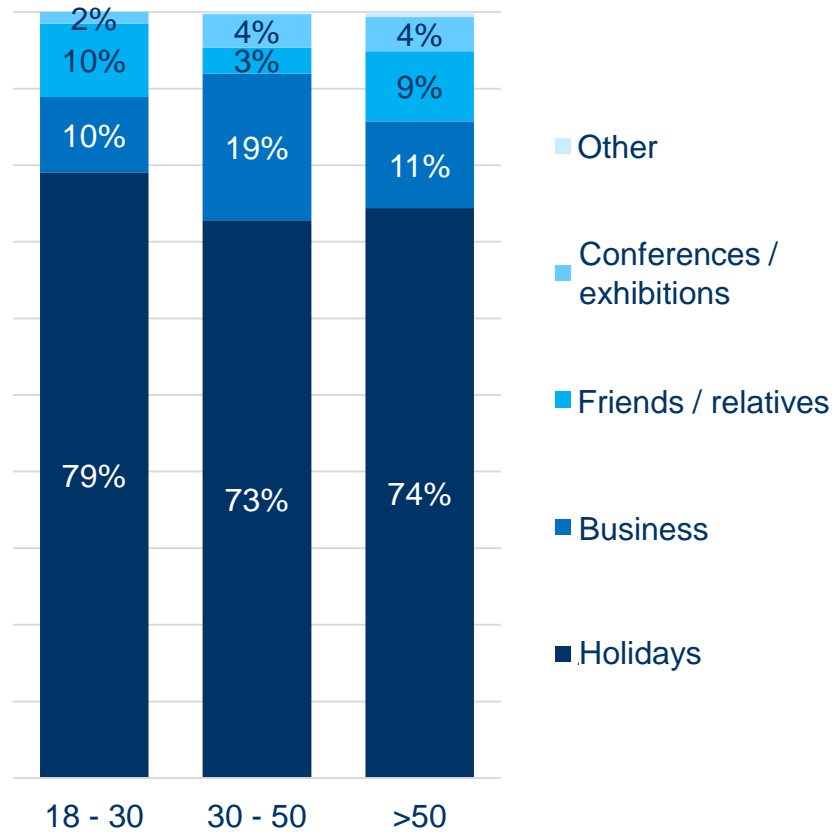
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consulting



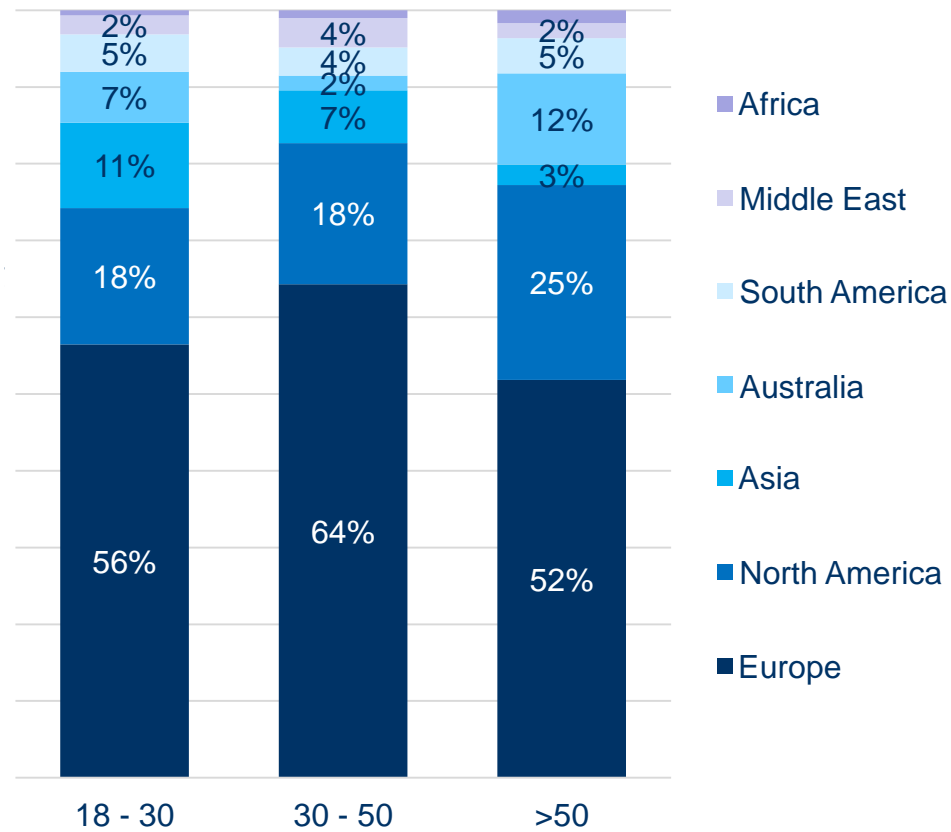
Tourist profile

Main reasons of visit & source regions

Main reasons of visit

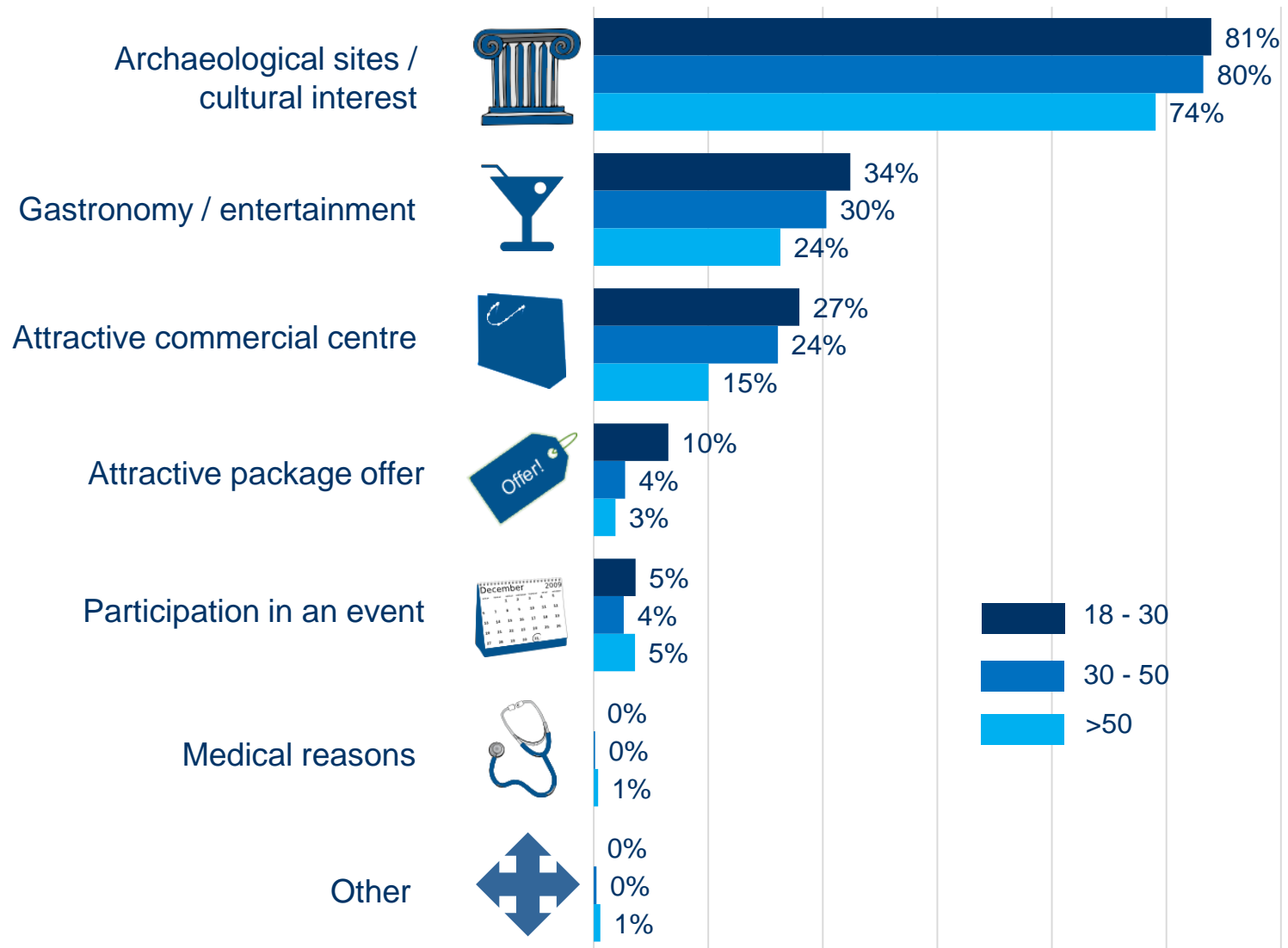


Major source region



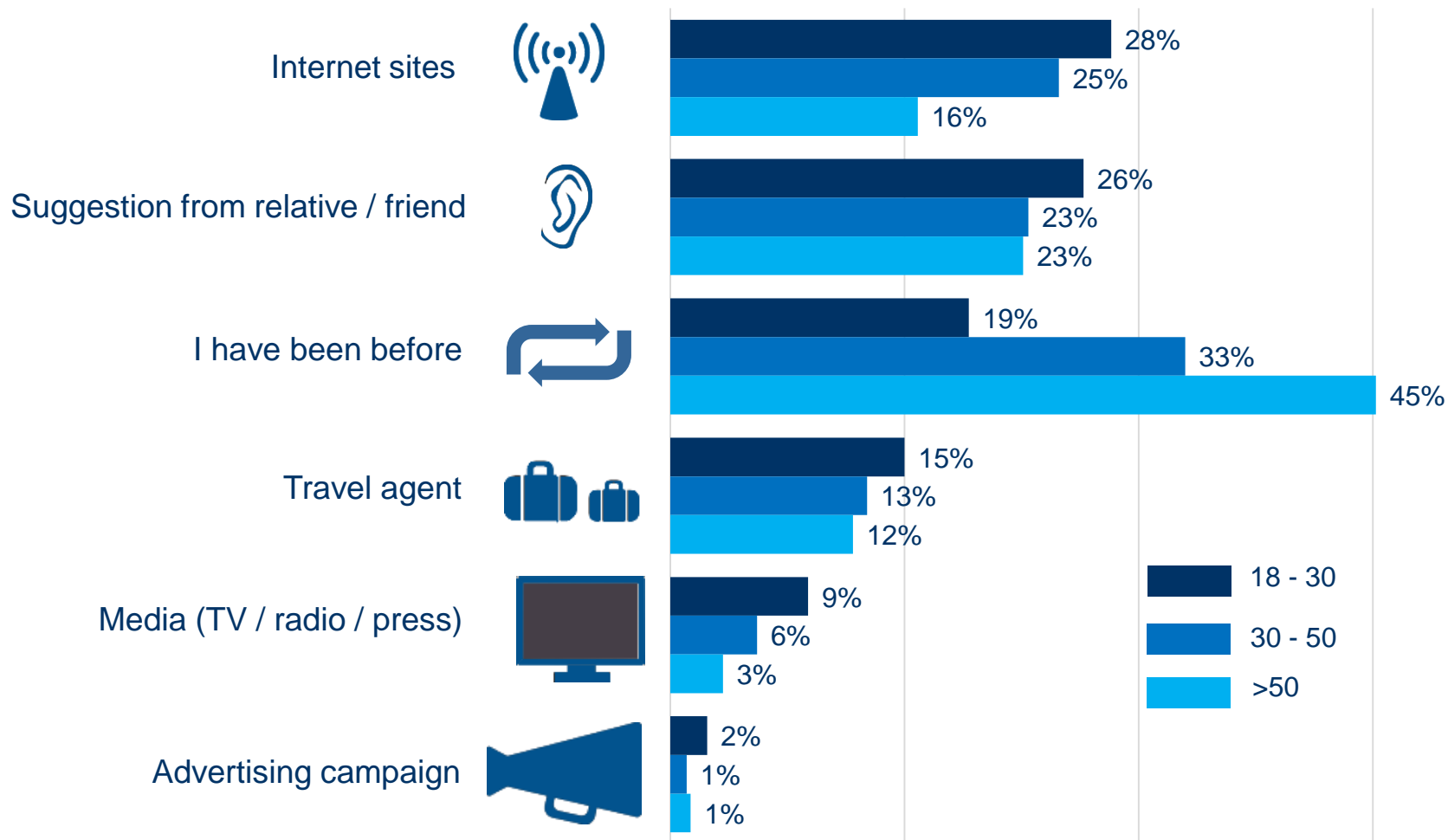
Why Athens

Reasons to visit Athens



Why Athens

Choice influencers

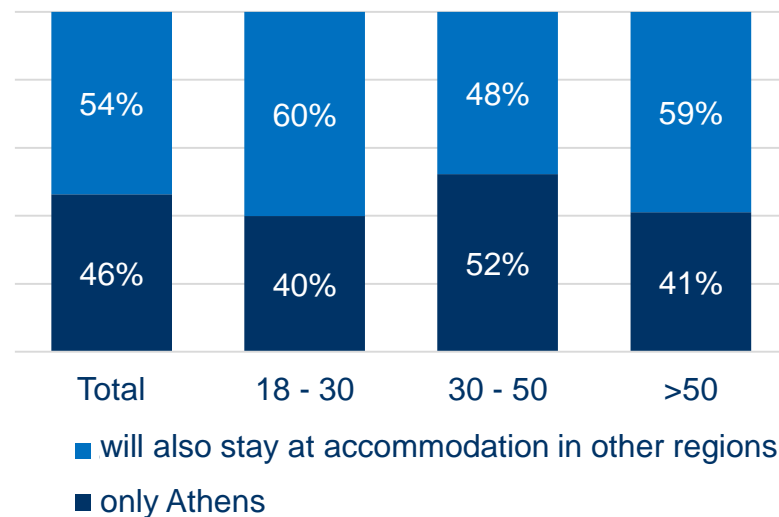


Experience

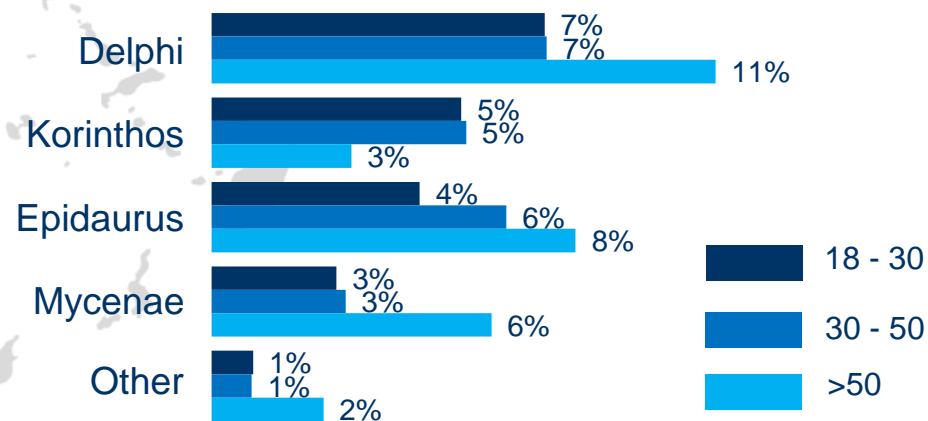
Travel structure



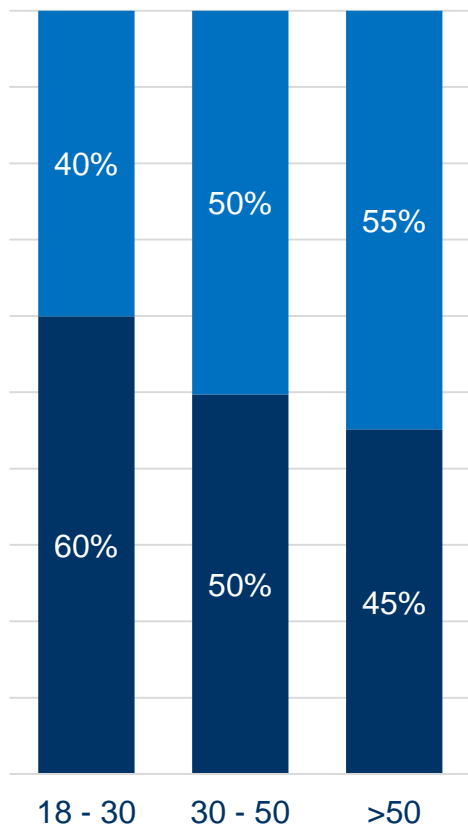
Areas included in the trip



Daily excursions



Visit to the coastal area

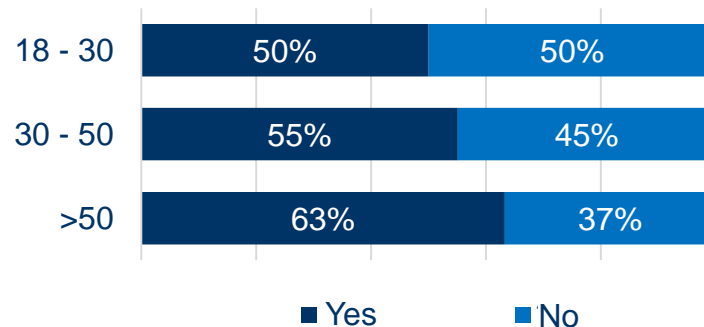


No but as a foreigner I know the Athens coast

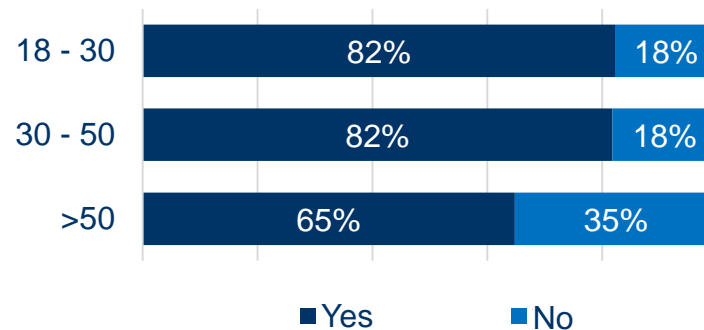


Yes and went for a swim

Awareness

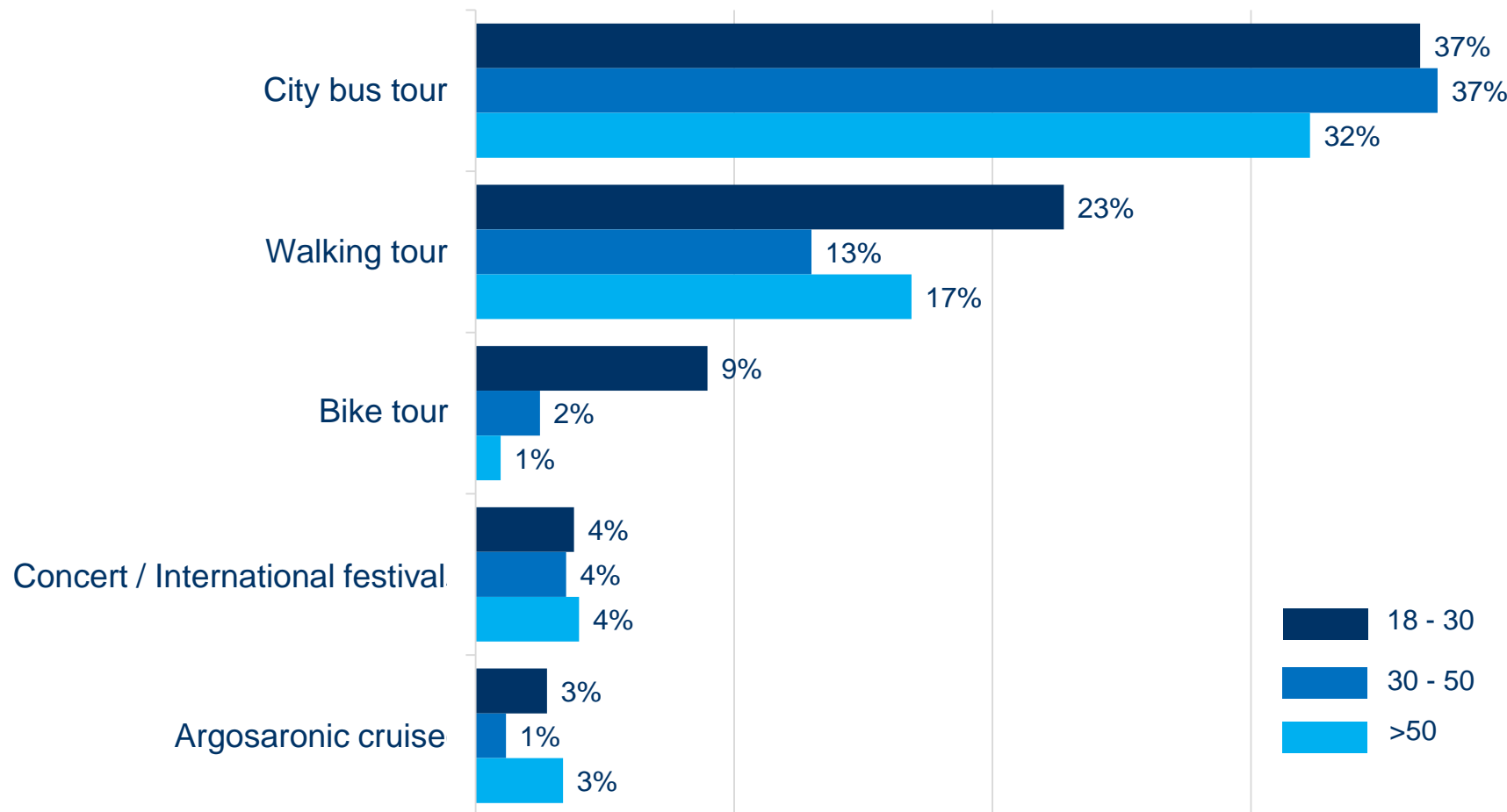


Swimming

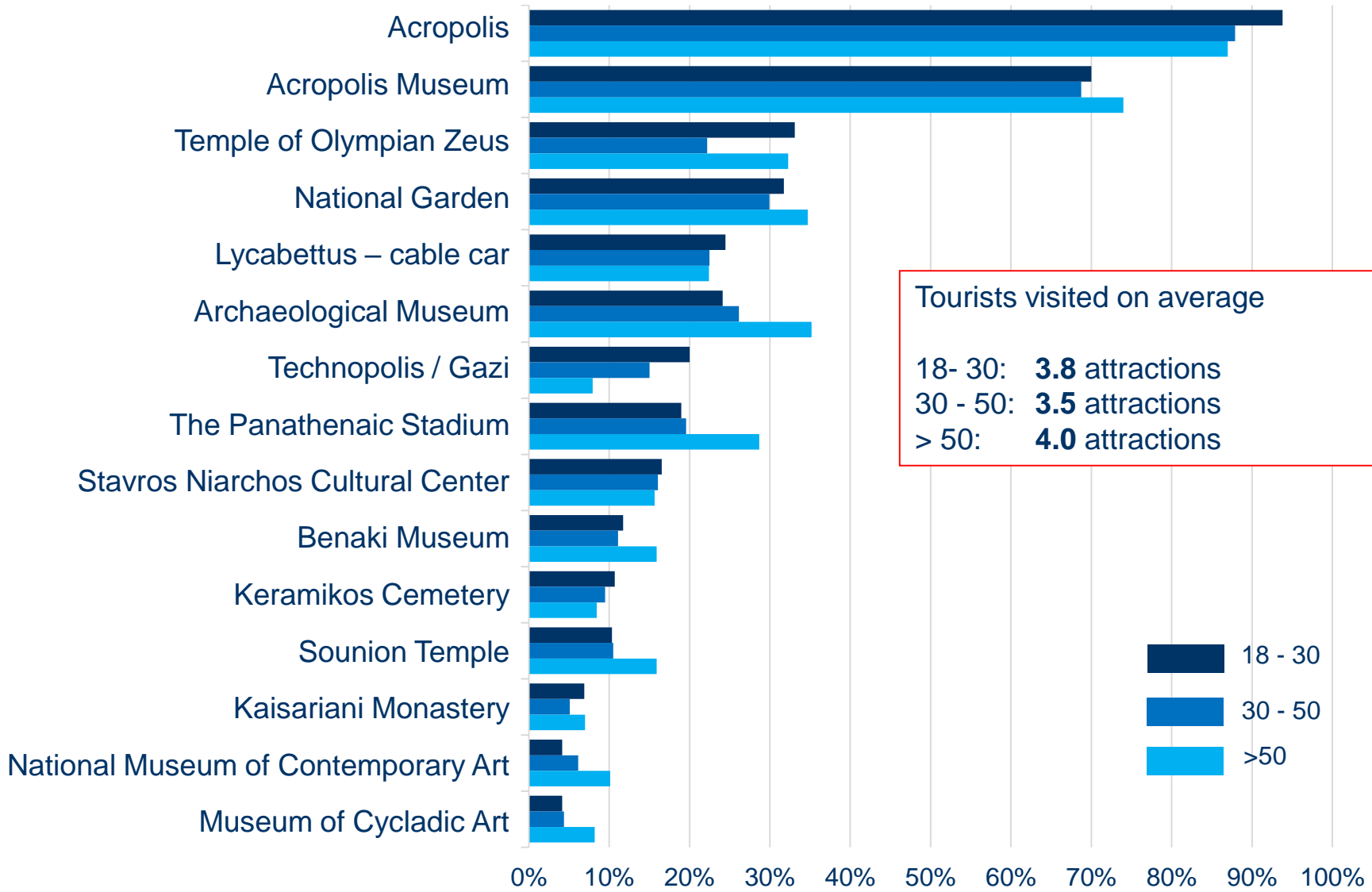




Organised tours



Experience Sightseeing

Tourists visited on average

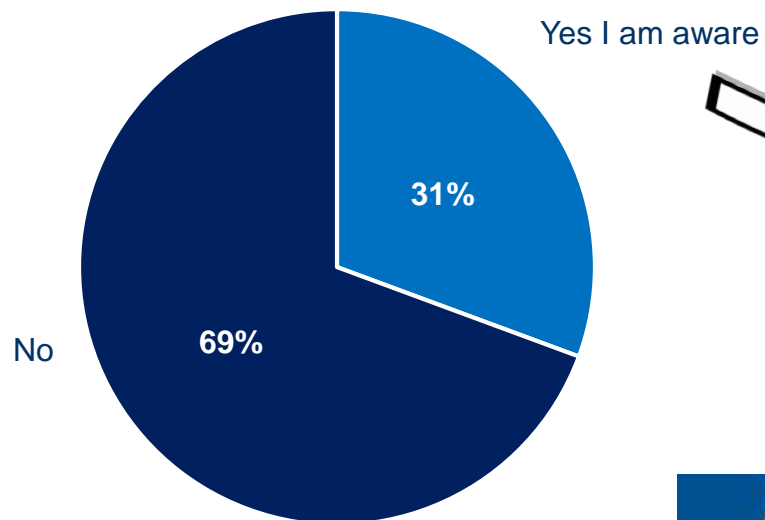
18- 30: **3.8** attractions
 30 - 50: **3.5** attractions
 > 50: **4.0** attractions

18 - 30
 30 - 50
 >50

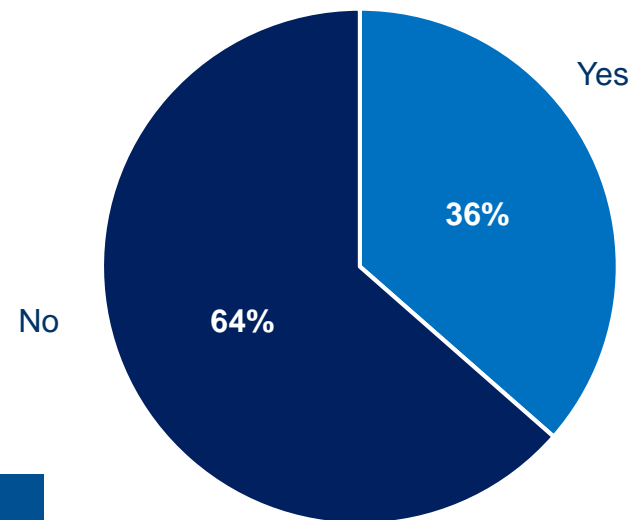
Athens Authentic Marathon

Awareness and special offers

Awareness of Athens marathon

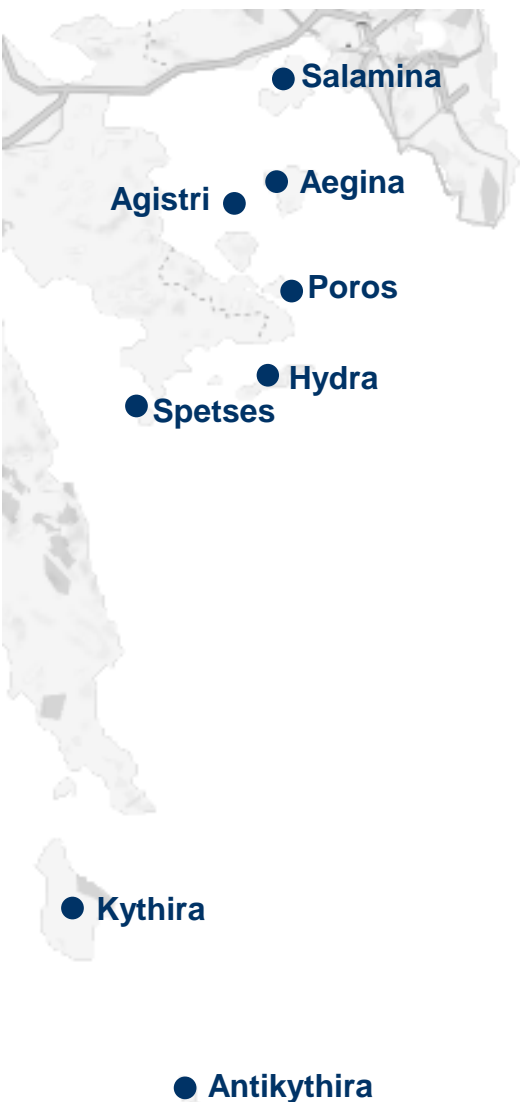


Awareness of special offers & events for visitors & runners

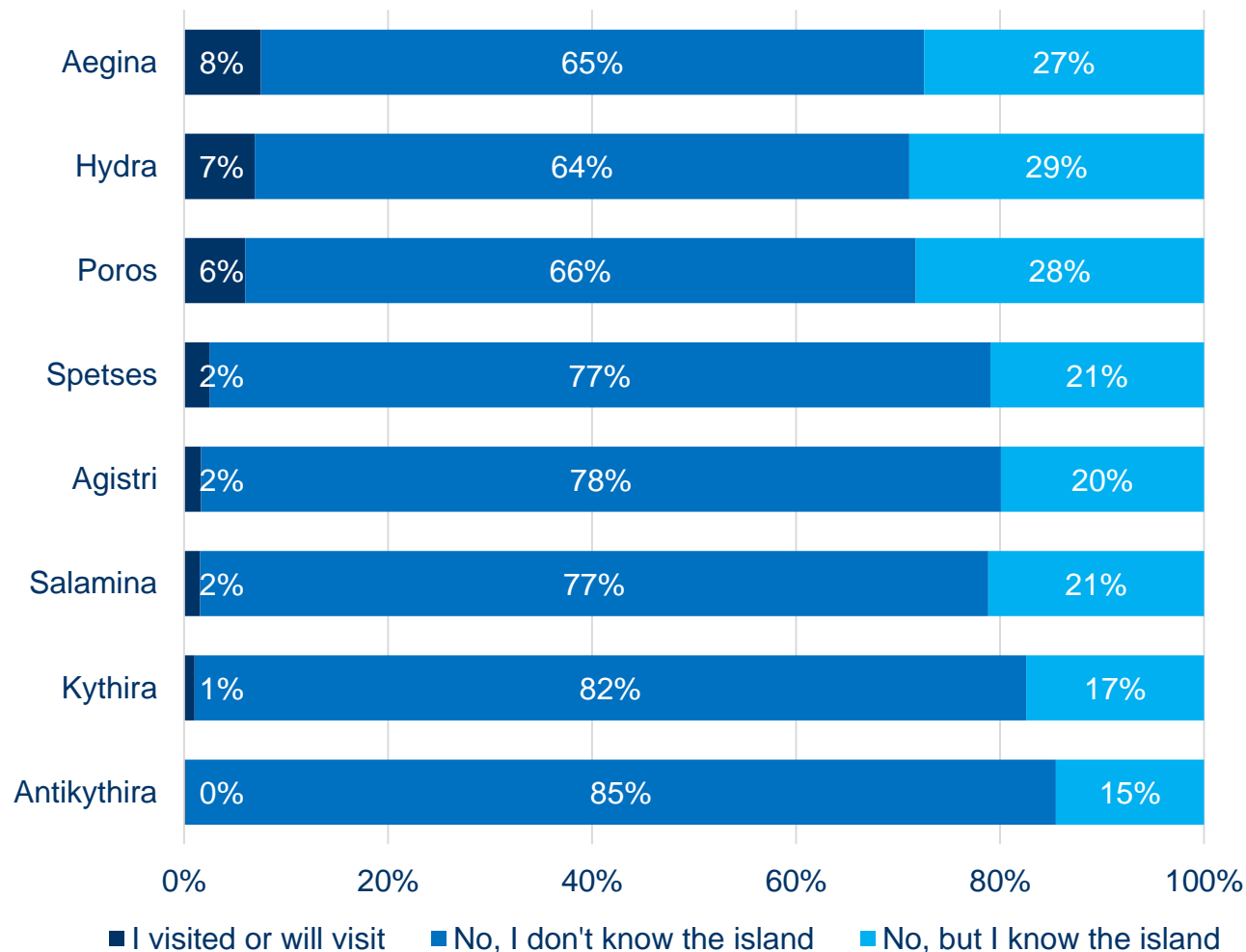


Argosaronic islands

Combined visit to Athens and the Argosaronic islands

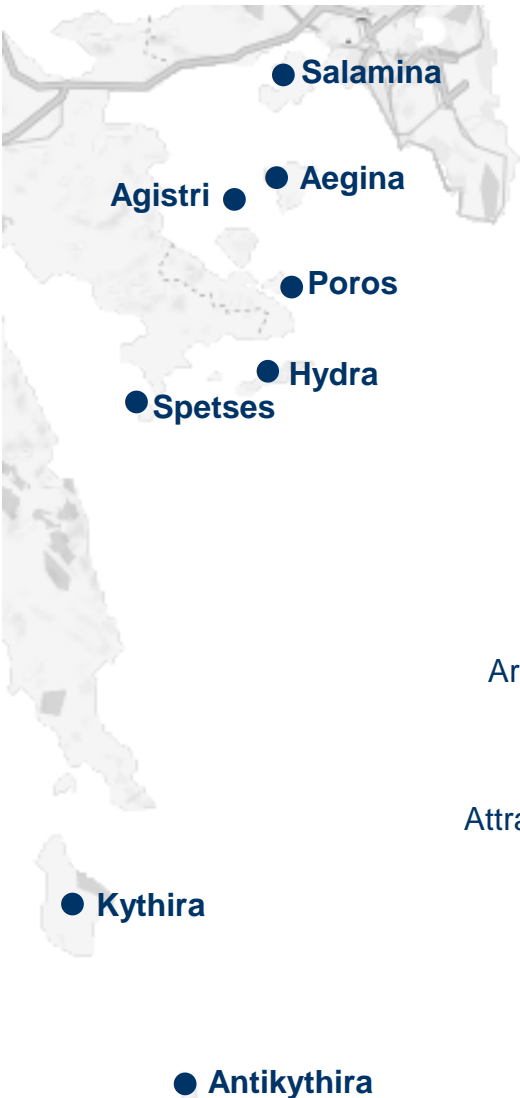


Visitation and awareness of the islands (foreigners)



Argosaronic islands

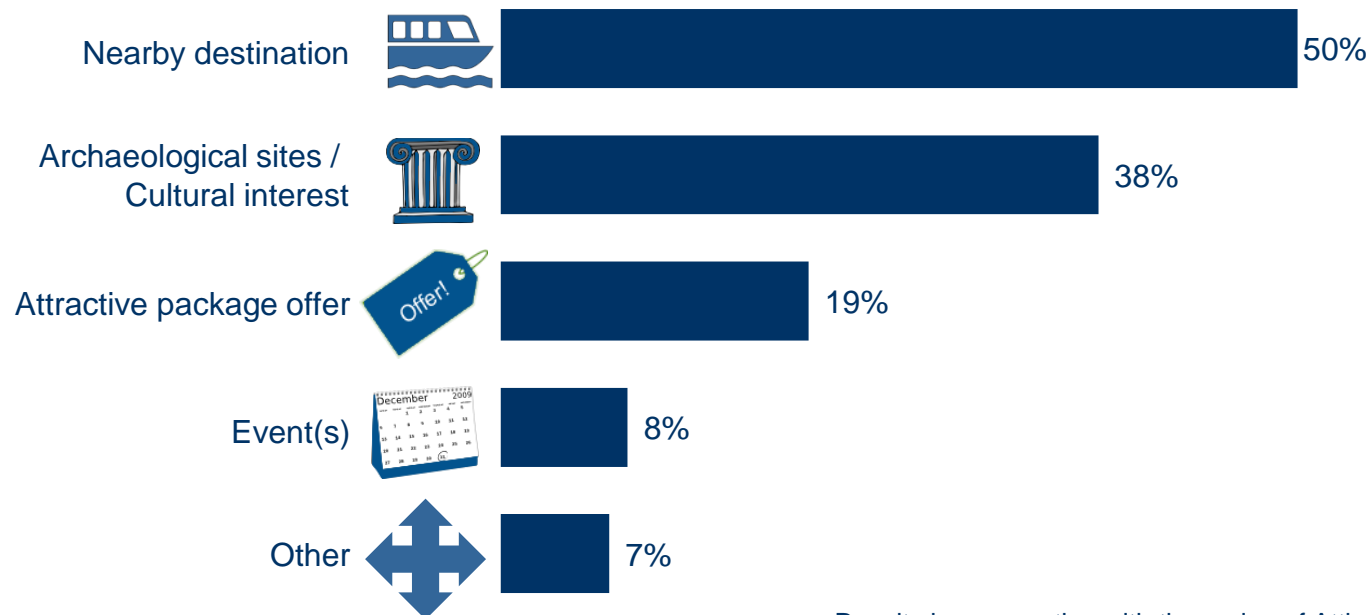
Tourist characteristics



80% visits the island(s) for the first time

3,4 nights average length of stay

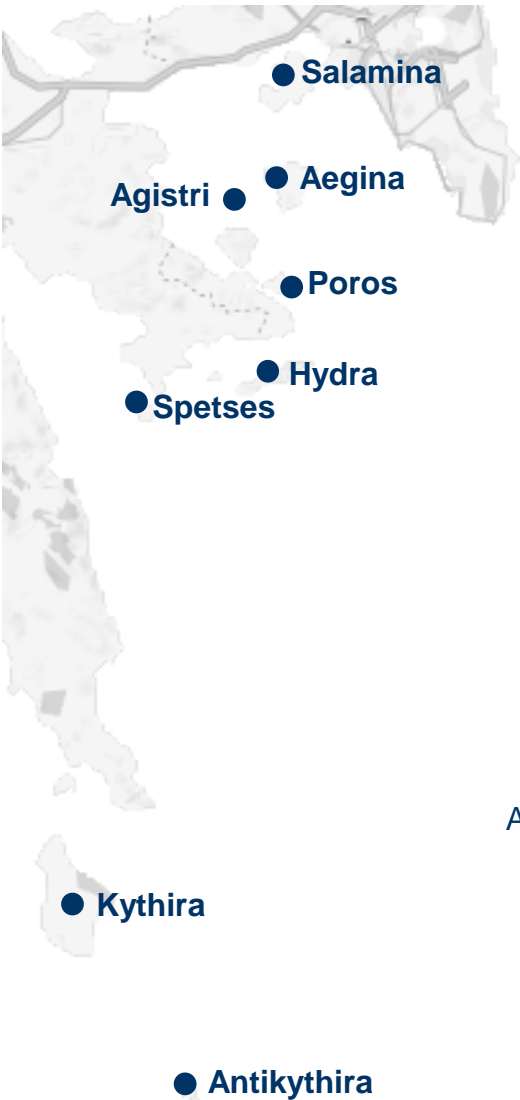
Main reasons to visit the island(s)



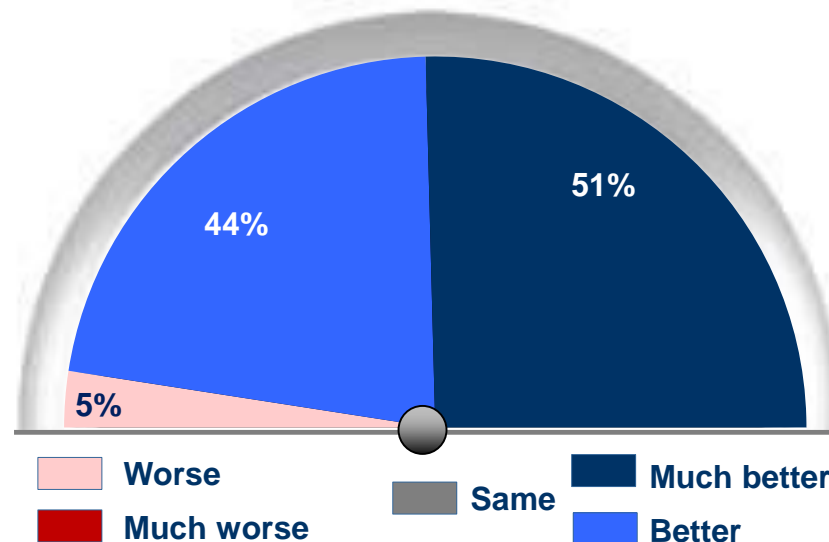
Results in cooperation with the region of Attica

Argosaronic islands

Satisfaction



The experience in comparison to expectations








Evaluation of accessibility



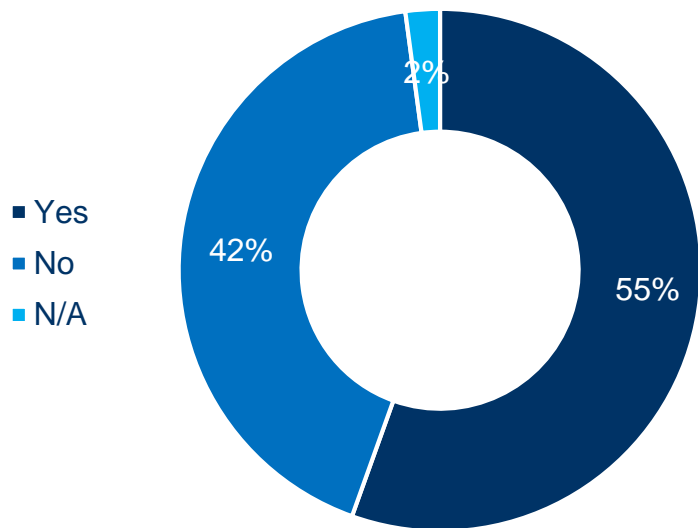
Results in cooperation with the region of Attica

Experience

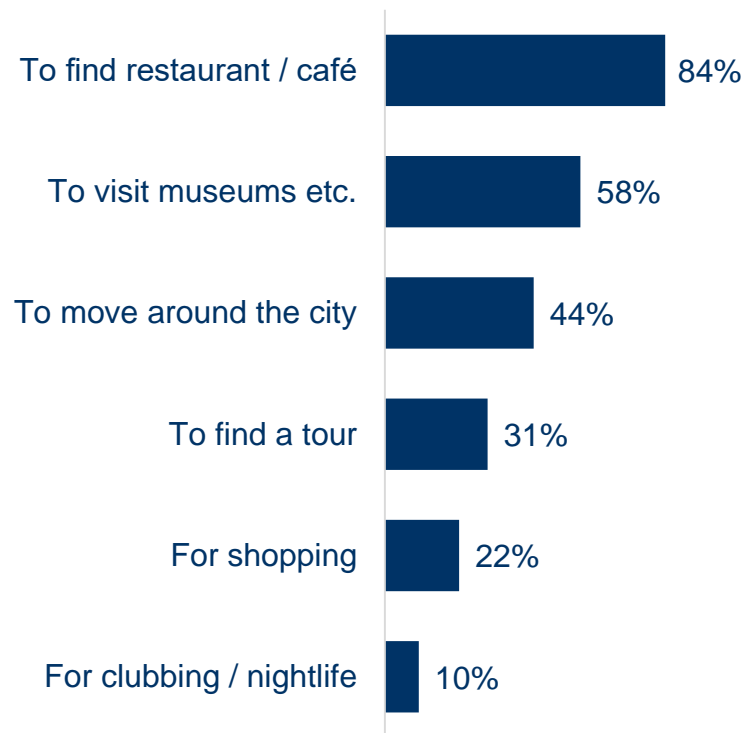
Expenditure per person per day in €

		Expenditure per age group			
		Total	18 - 30	30 - 50	> 50
Sightseeing & leisure		€ 20	€ 16	€ 22	€ 22
Restaurants & cafés		€ 40	€ 30	€ 42	€ 42
Shopping		€ 30	€ 26	€ 34	€ 25
Local transfer & other		€ 26	€ 18	€ 28	€ 30
Total		€ 116	€ 89	€ 125	€ 120

Did you take any brochures from the hotel Info Stand?

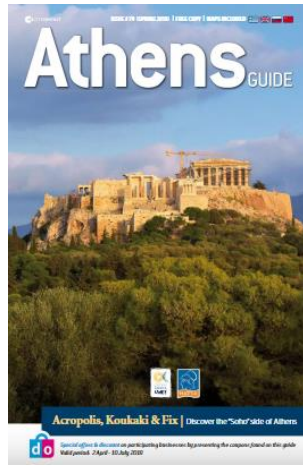


If yes, how did you use them?

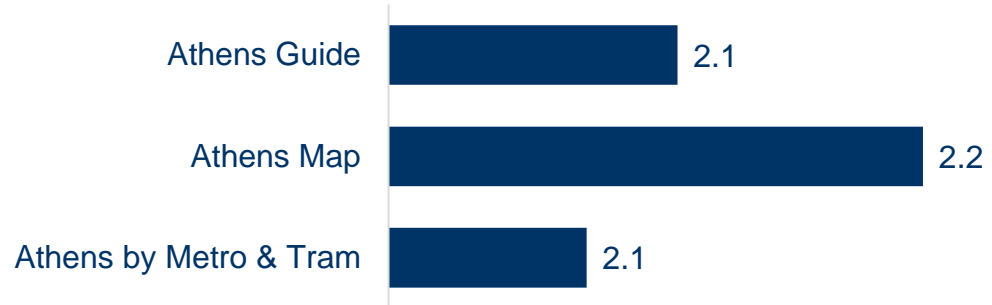


Based on the following hotels:

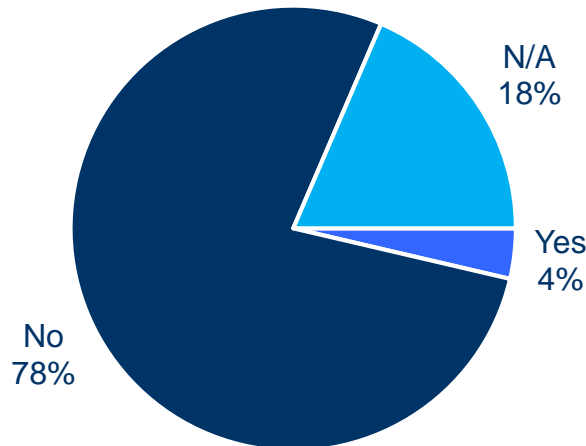
Amarilia, Athens Center Square, Candia, Crowne Plaza, Electra, Electra Palace, Museum, Fenix, Novotel, Parthenon, Pythagorion, Stratos Vassilikos και Zafolia.



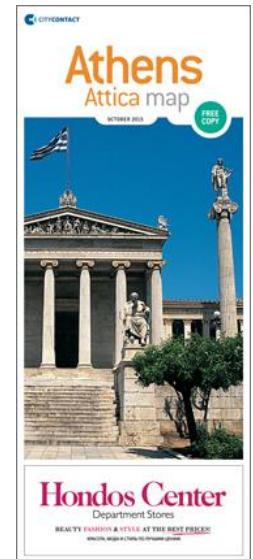
Members of your group who used the same copy



Use of Discounts & Offers in Athens Guide

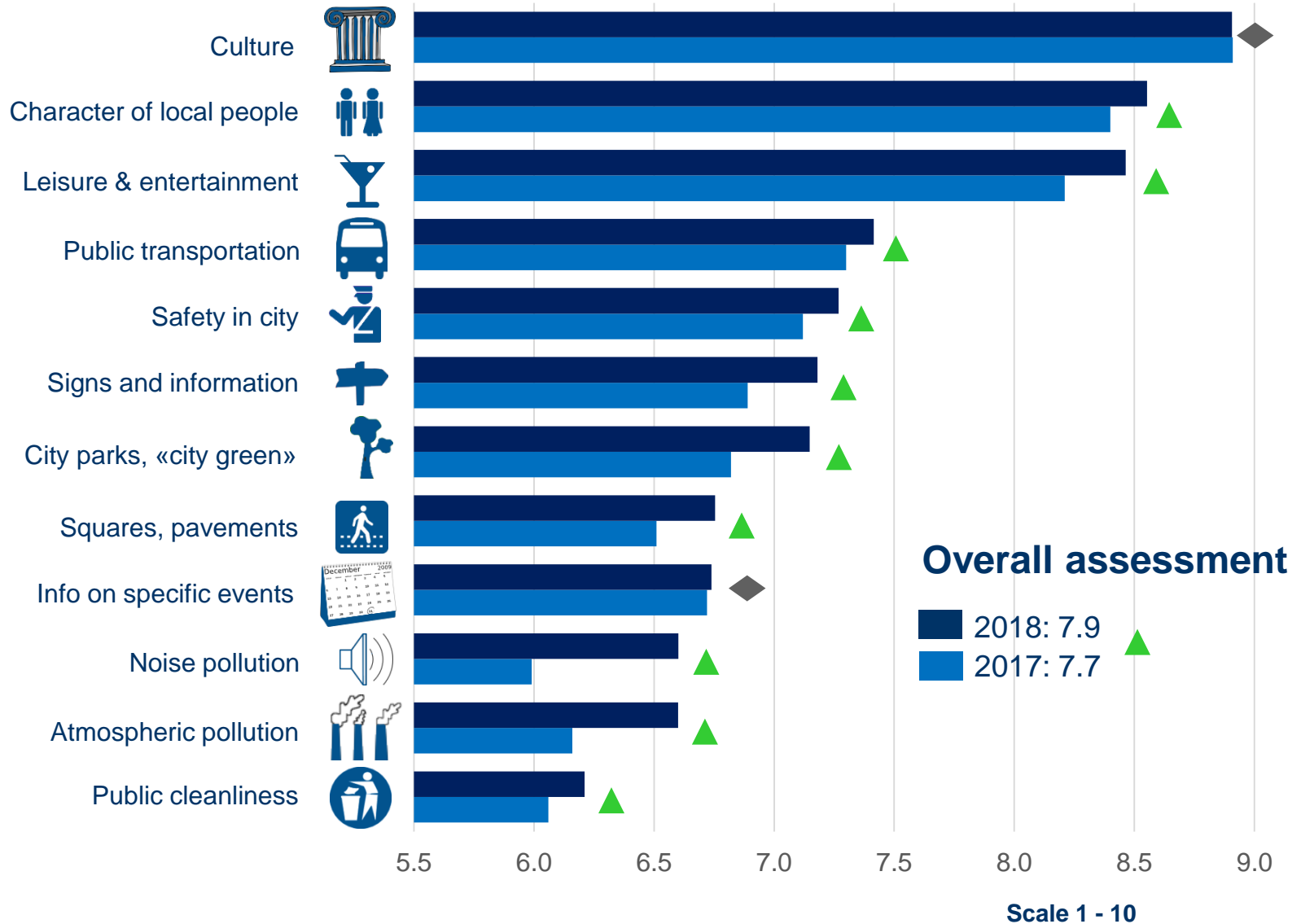


On average the Discount & Offers were used in **2.1** businesses



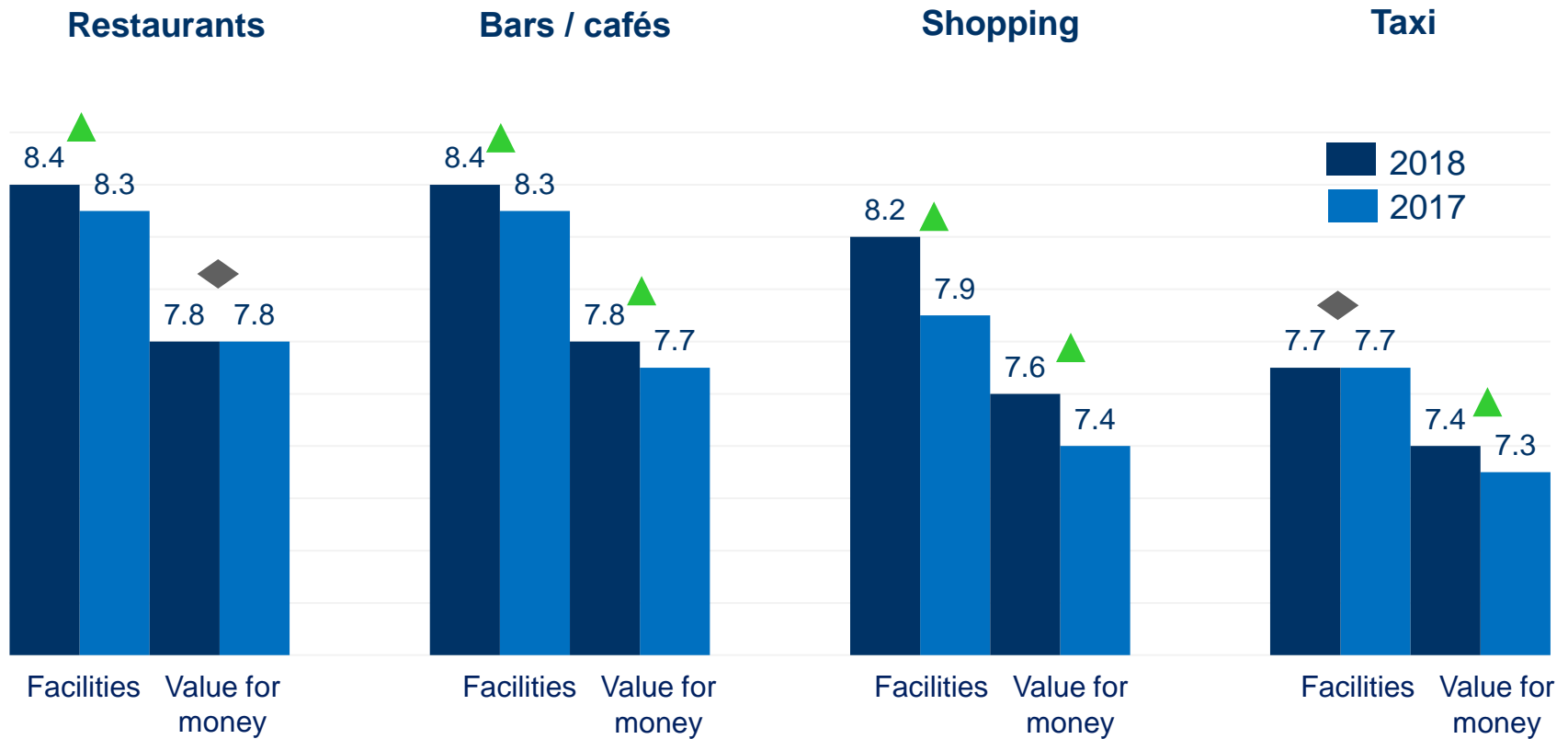
Evaluation

2018 vs 2017



Evaluation

Facilities & value for money

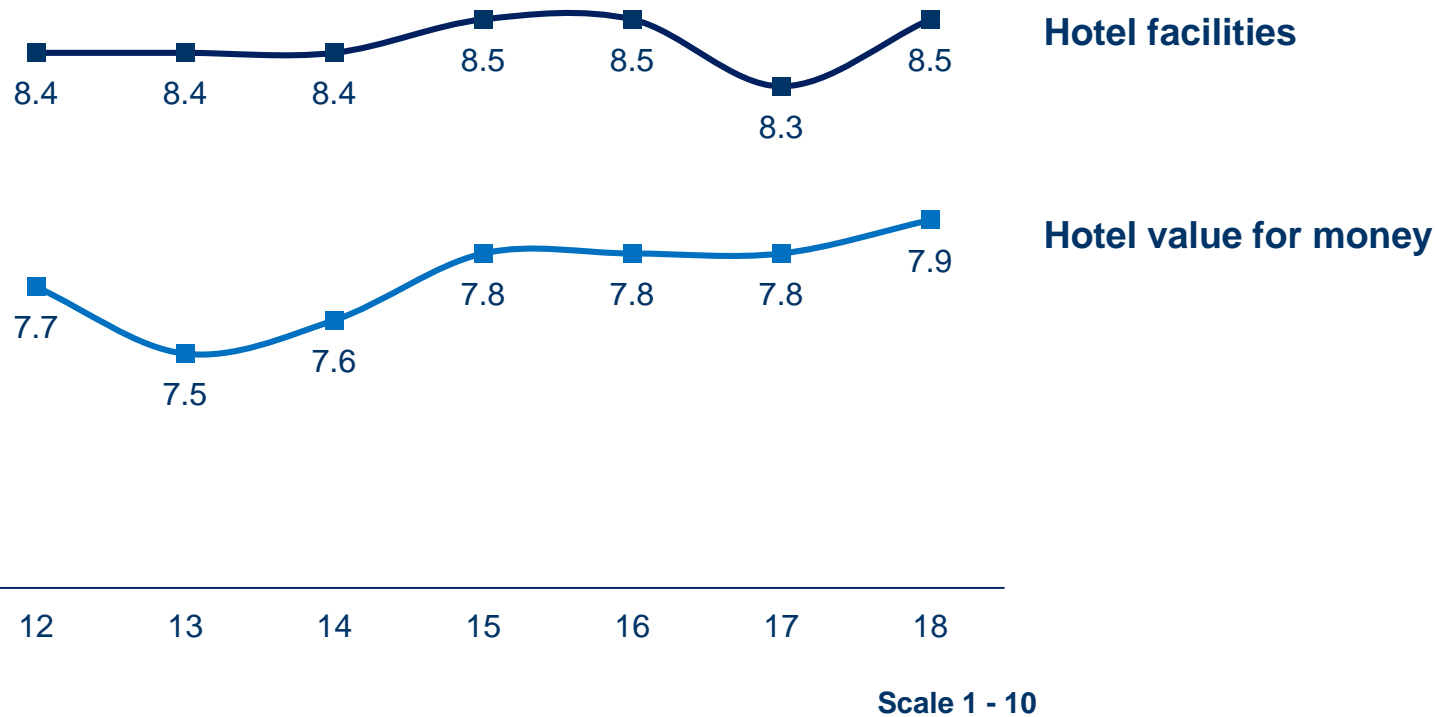


Evaluation

Hotels 2012 - 2018



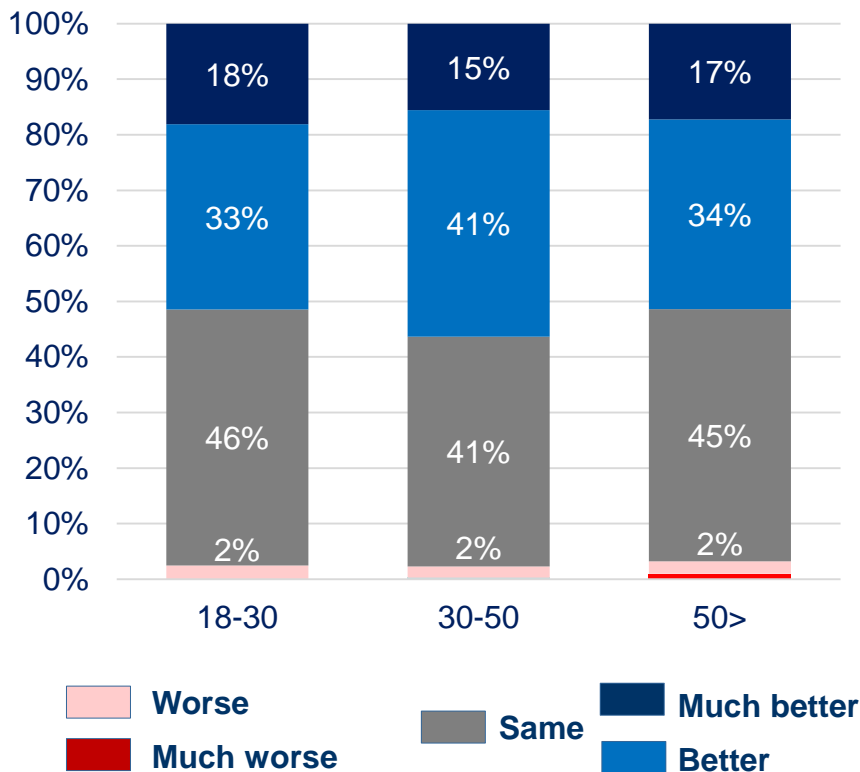
Hotel evaluation



Experience

Managing expectations and areas for improvement

The experience of the visit to Athens compared to expectations



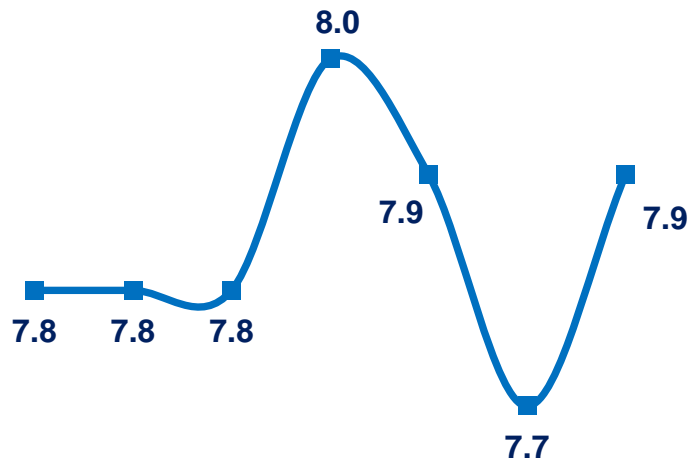
Issues for improvement

- Graffiti needs to be removed
- Maintenance of pavements
- Cleanliness of roads and pavements
- Assistance for beggars
- Signs and information in English
- Buildings need to be restored

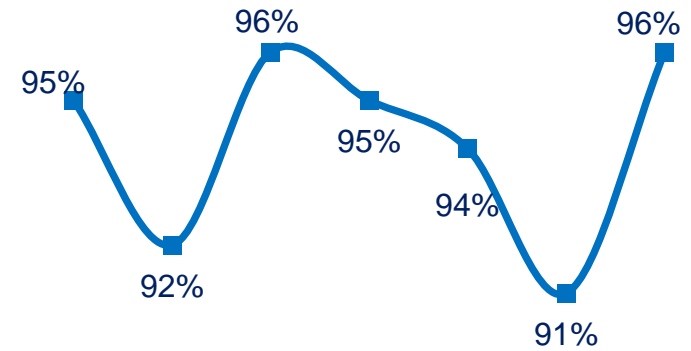
Evaluation

2012 - 2018

Total assessment



% who will recommend Athens



12 13 14 15 16 17 18

12 13 14 15 16 17 18

Scale 1 - 10

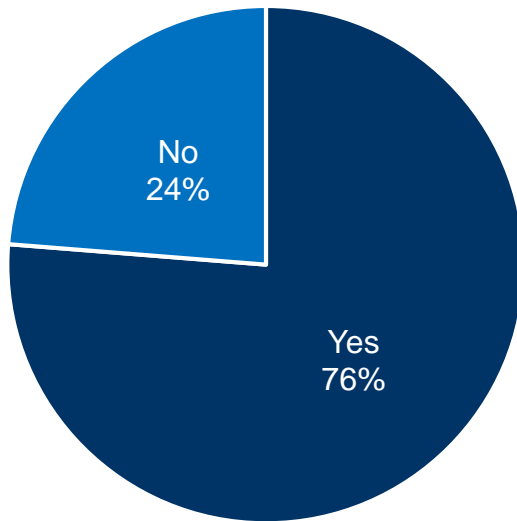


Evaluation

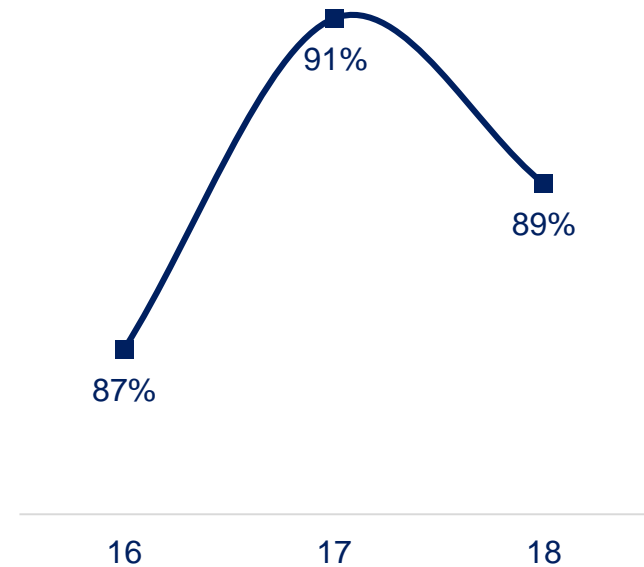
Re-visit




Are there things that you would have liked to see / do?



Re-visit





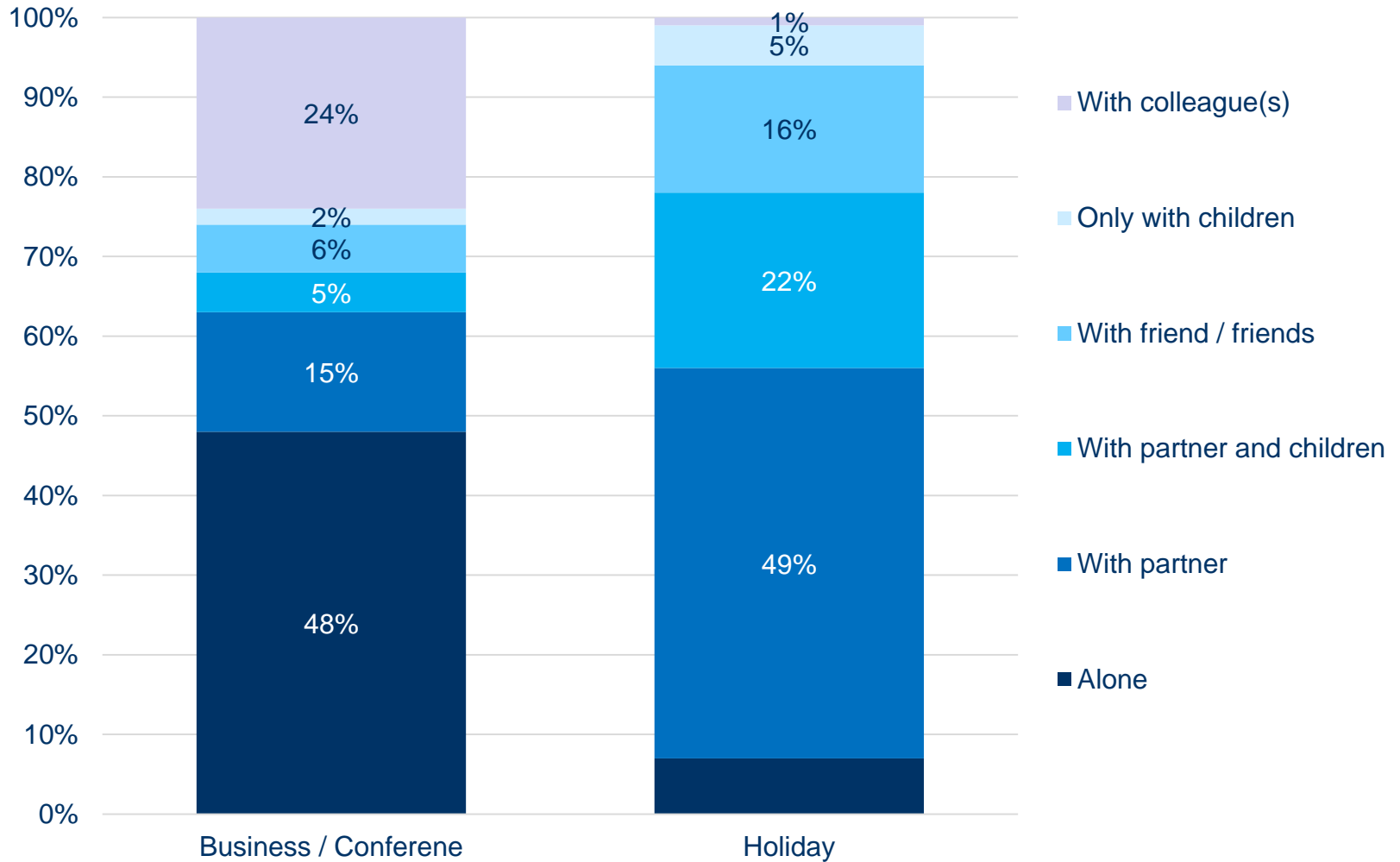
Tourist Profile & Satisfaction per Traveller Group

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Tourist profile

Changing way of traveling



Leisure Travellers – Market Segments



Alone



Couples



Families

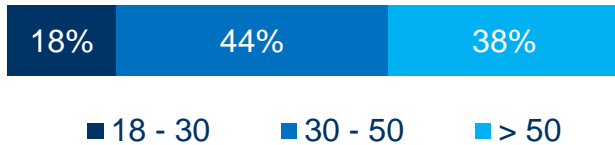


Friends

Leisure Travellers

Alone

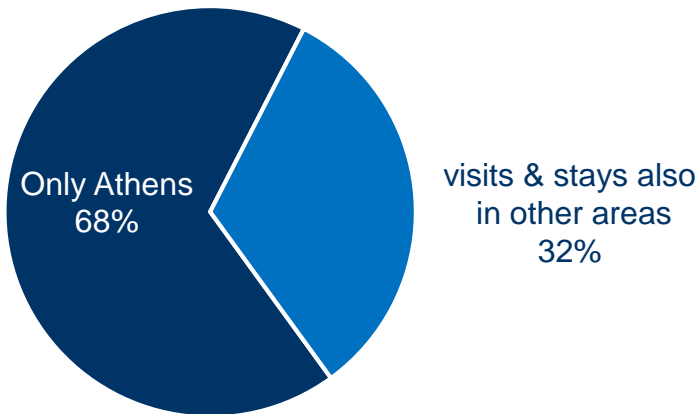
Age



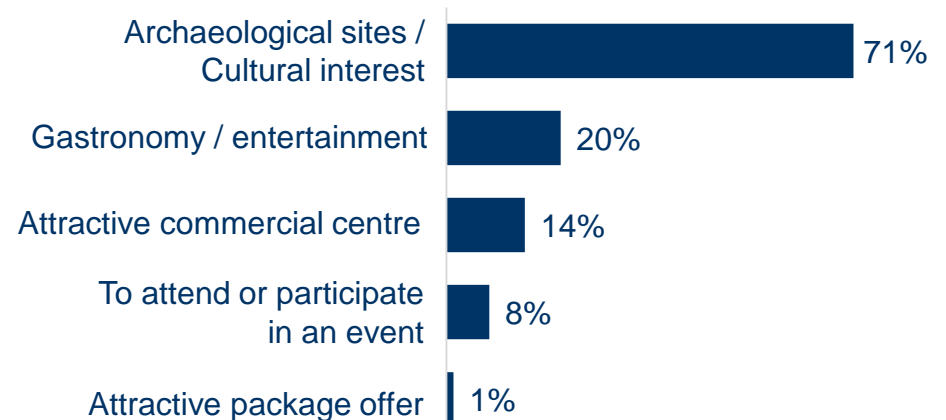
Frequency



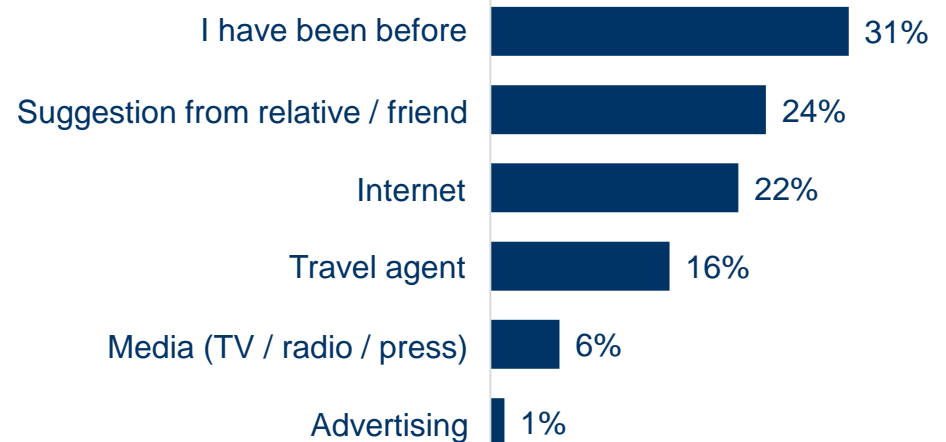
Travel structure



Reasons to visit Athens



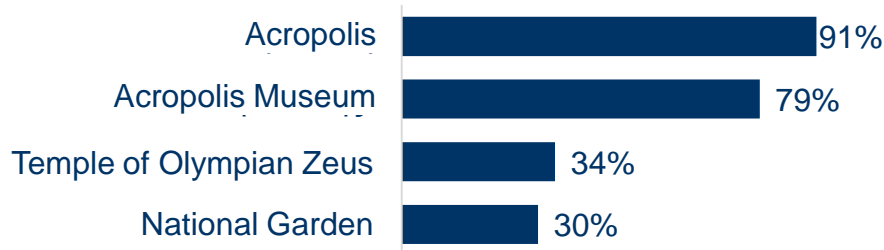
Choice influencers



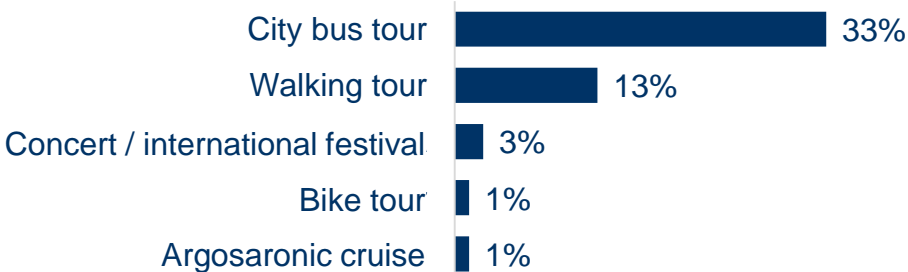
Leisure travellers

Alone

Top attractions



Activities



Highest rating



Lowest rating



35% visited the Athens coast

35% knows that the Athens Authentic Marathon is organized in November each year

€ 114 total spent per person per day

79% would have liked to see / do other things in Athens

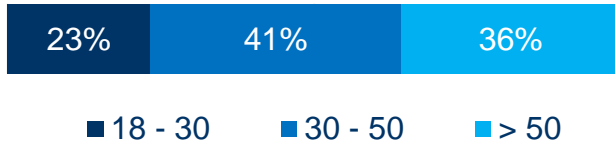
88% wants to revisit

8,0 overall assessment

Leisure travellers

Couples

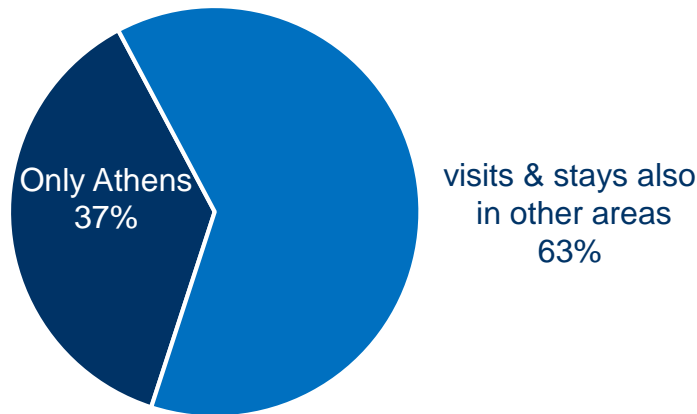
Age



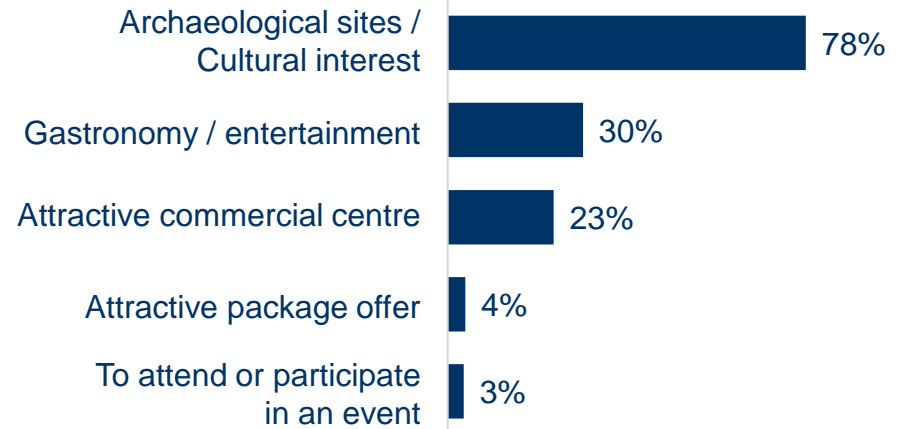
Frequency



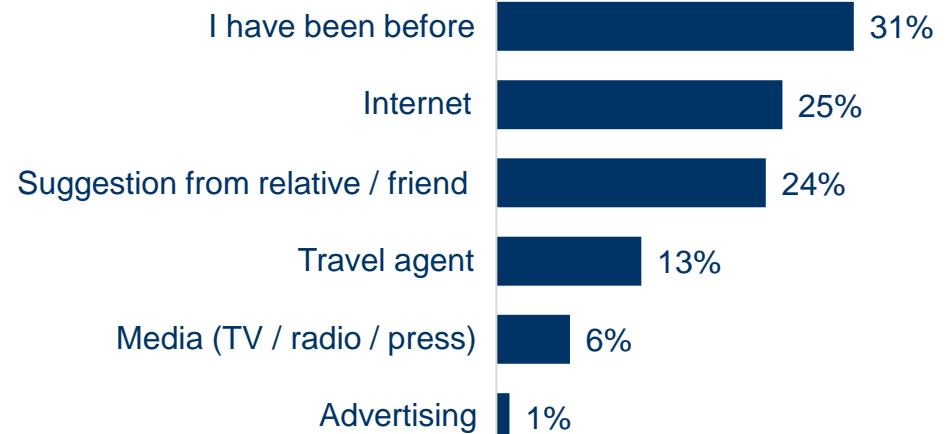
Travel structure



Reasons to visit Athens



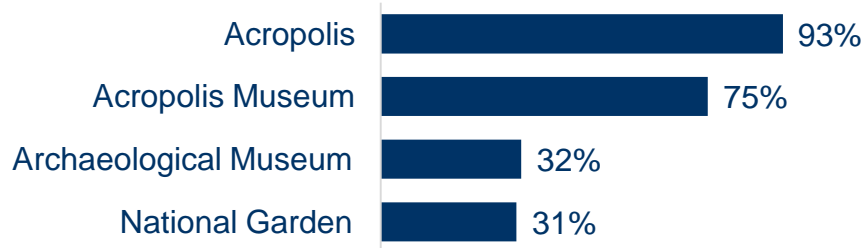
Choice influencers



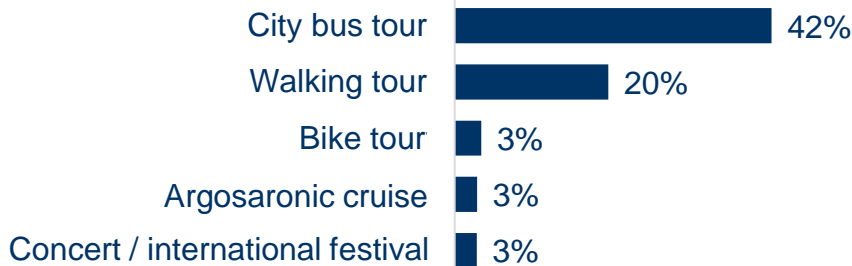
Leisure travellers

Couples

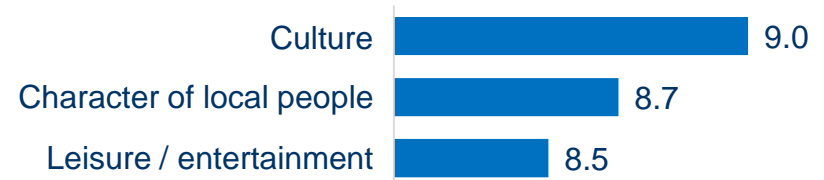
Top attractions



Activities



Highest rating



Lowest rating



55% visited the Athens coast

29% knows that the Athens Authentic Marathon is organized in November each year

€ 108 total spent per person per day

75% would have liked to see / do other things in Athens

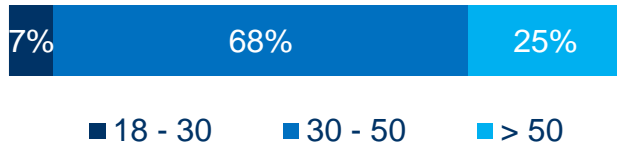
88% wants to revisit

8,0 overall assessment

Leisure travellers

Families

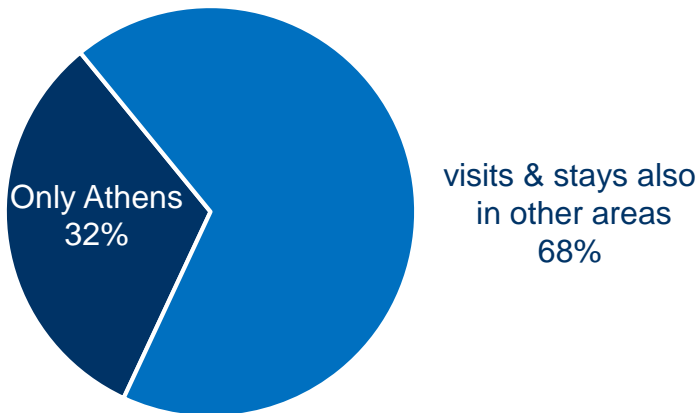
Age



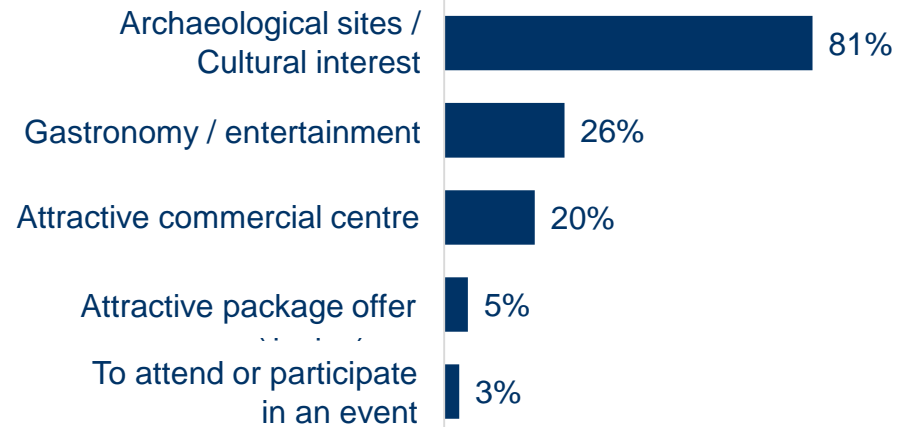
Frequency



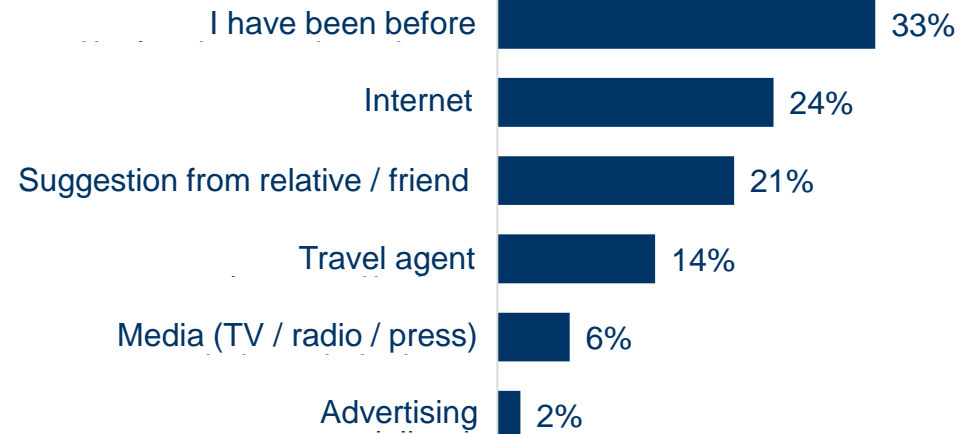
Travel structure



Reasons to visit Athens



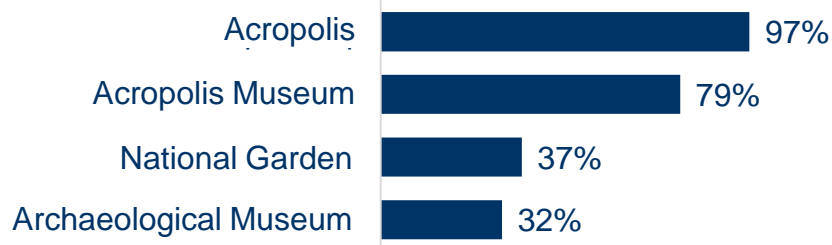
Choice influencers



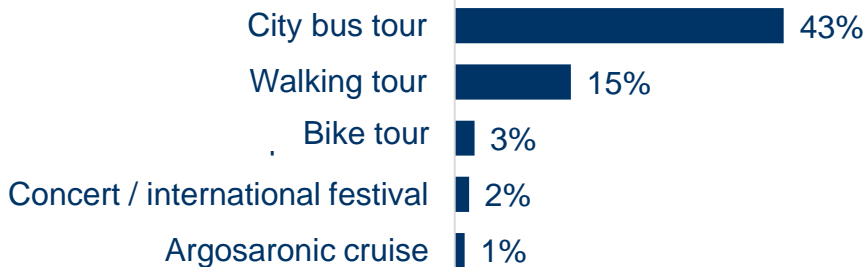
Leisure Travellers

Families

Top attractions



Activities



Highest rating



Lowest rating



60% visited the Athens coast

33% knows that the Athens Authentic Marathon is organized in November each year

€ 143 total spent per person per day

71% would have liked to see / do other things in Athens

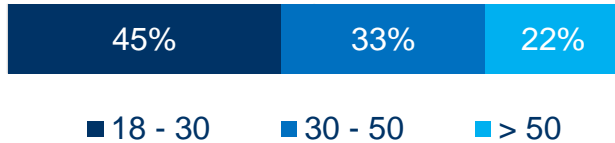
89% wants to revisit

7,9 overall assessment

Leisure Travellers

Friends

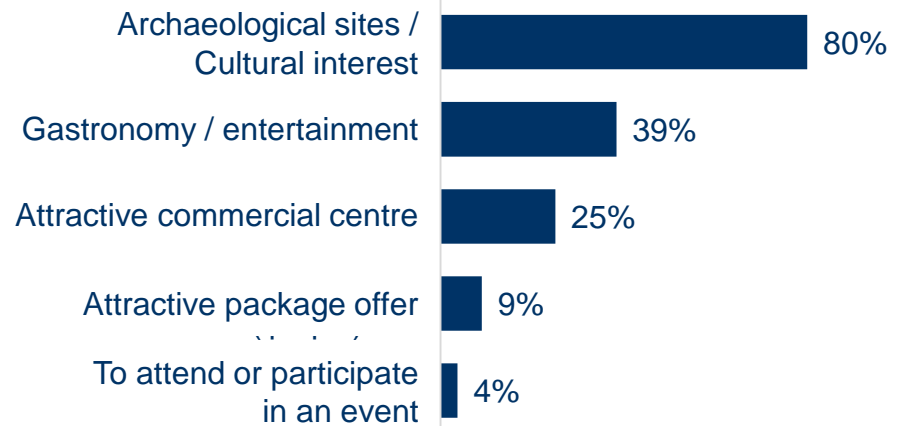
Age



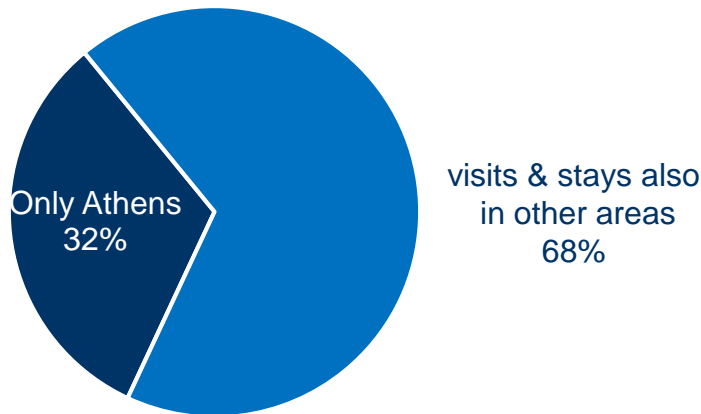
Frequency



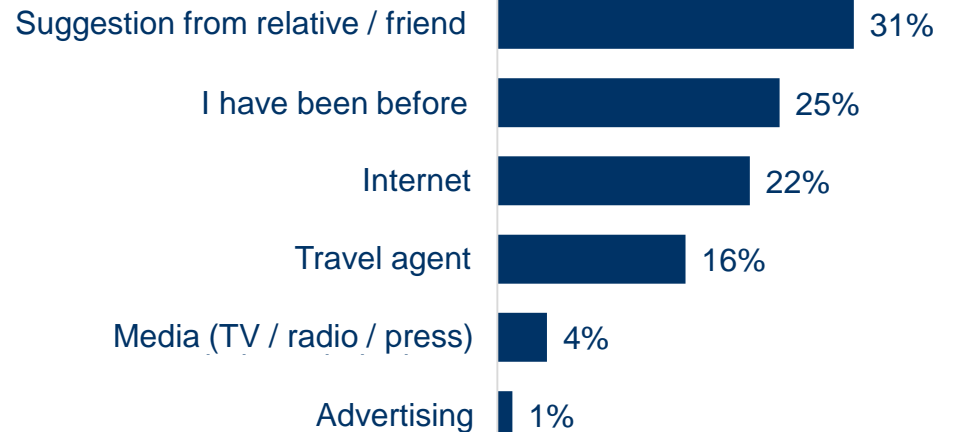
Reasons to visit Athens



Travel structure



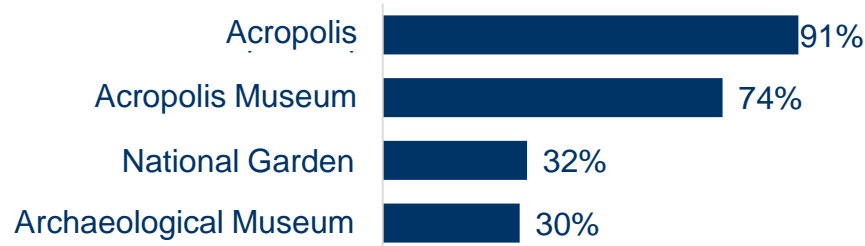
Choice influencers



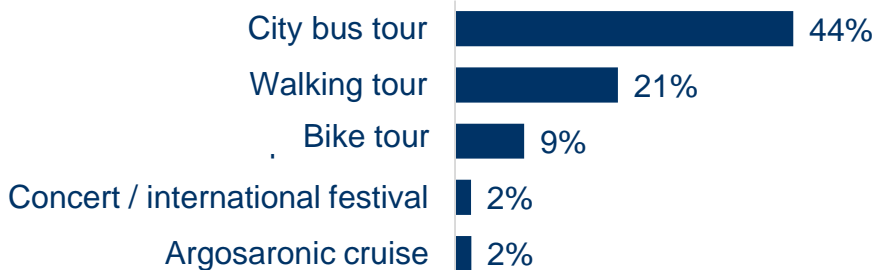
Leisure travellers

Friends

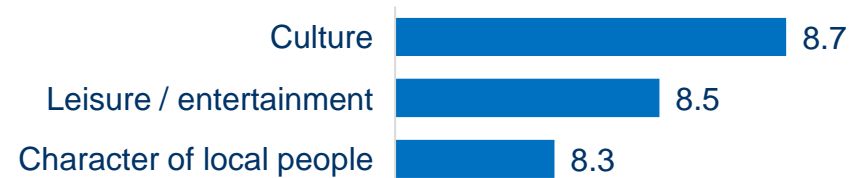
Top attractions



Activities



Highest rating



Lowest rating



60% visited the Athens coast

21% knows that the Athens Authentic Marathon is organized in November each year

€ 75 total spent per person per day

76% would have liked to see / do other things in Athens

86% wants to revisit

7,9 overall assessment

Business Travellers – Market Segments



Alone



Couples



With colleague

Business Travellers

Alone

Age



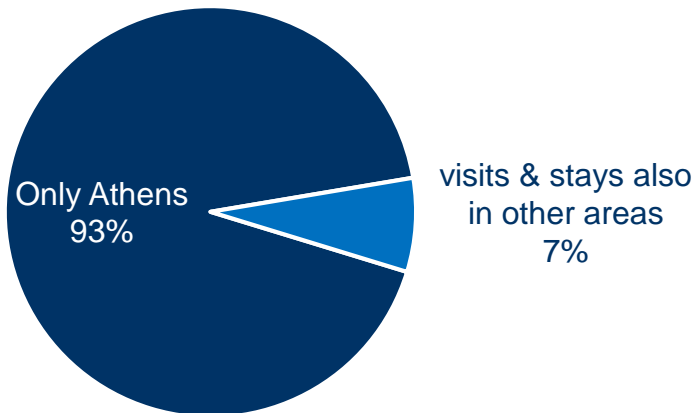
■ 18 - 30 ■ 30 - 50 ■ > 50

Frequency



■ First time ■ Several times

Travel structure



€ 109

total spent per person per day

Highest rating



Lowest rating



35%

knows that the Athens Authentic Marathon is organized in November each year

78%

would have liked to see / do other things in Athens

96%

wants to revisit

8,0

overall assessment

Business Travellers

With colleague

Age



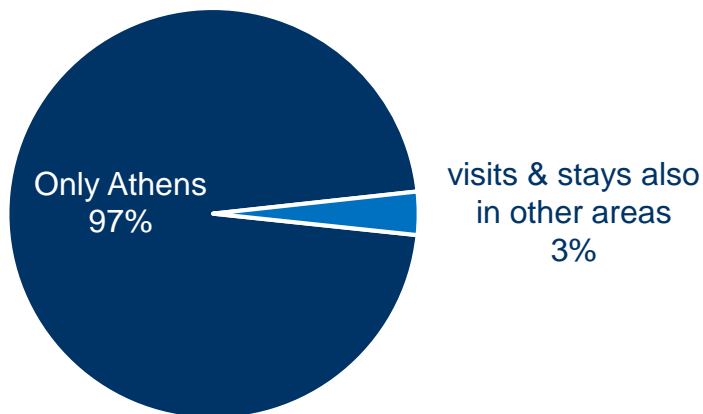
■ 18 - 30 ■ 30 - 50 ■ > 50

Frequency



■ First time ■ Several times

Travel structure



€ 84 total spent per person per day

Highest rating



Lowest rating



34%

knows that the Athens Authentic Marathon is organized in November each year

65%

would have liked to see / do other things in Athens

94%

wants to revisit

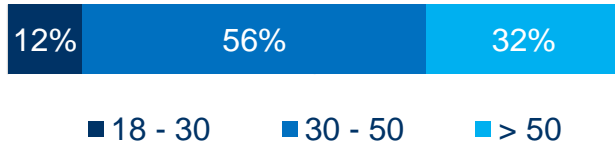
7,9

overall assessment

Business Travellers

Couples

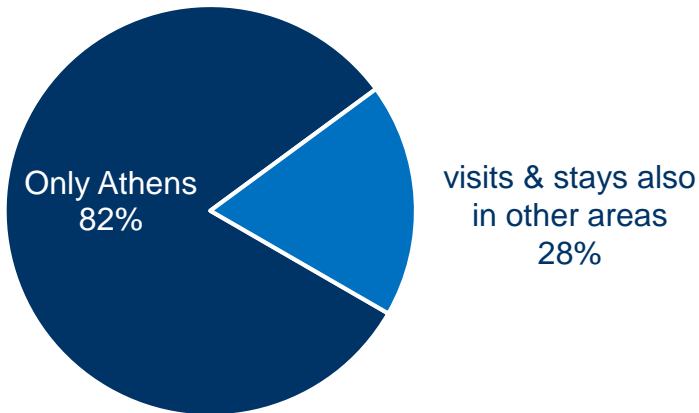
Age



Frequency



Travel structure



€ 69 total spent per person per day

Highest rating



Lowest rating



46% knows that the Athens Authentic Marathon is organized in November each year

83% would have liked to see / do other things in Athens

97% wants to revisit

7,9 overall assessment



Comparison with Barcelona

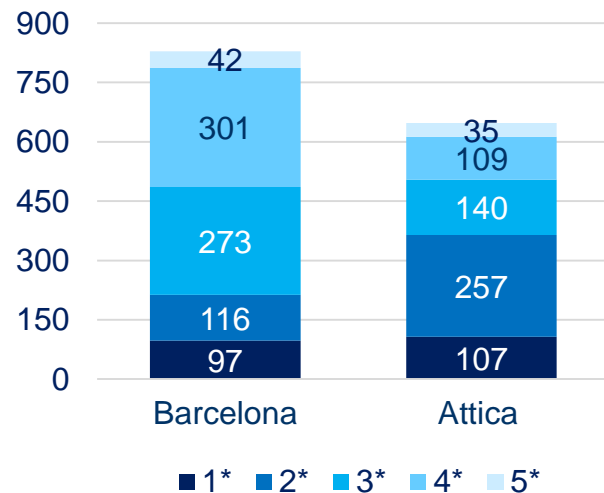
gbr
consulting



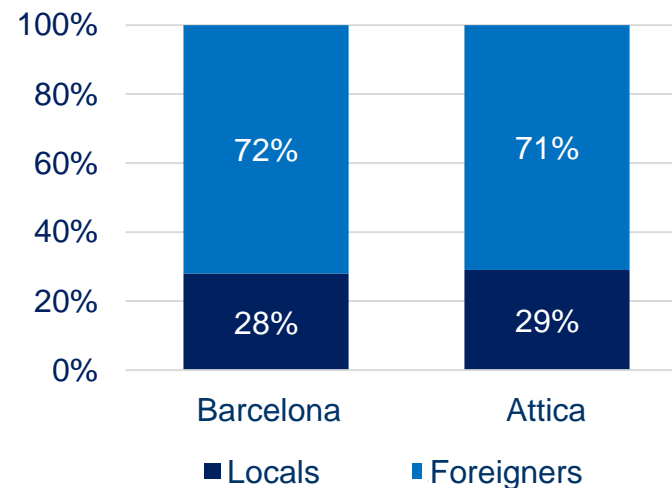
Province de Barcelona vs Attica

Hotel supply and demand (2017)

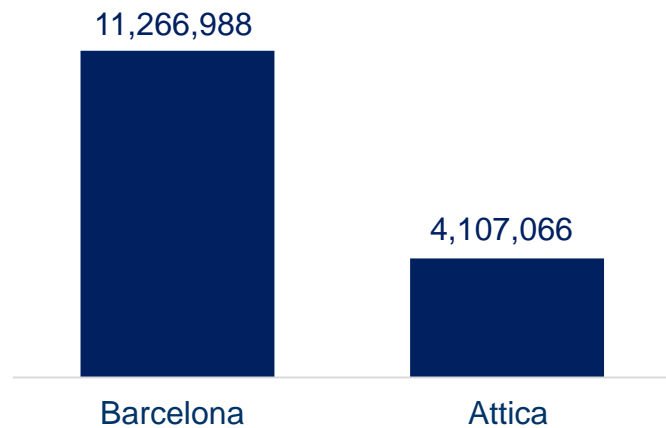
Number of hotels



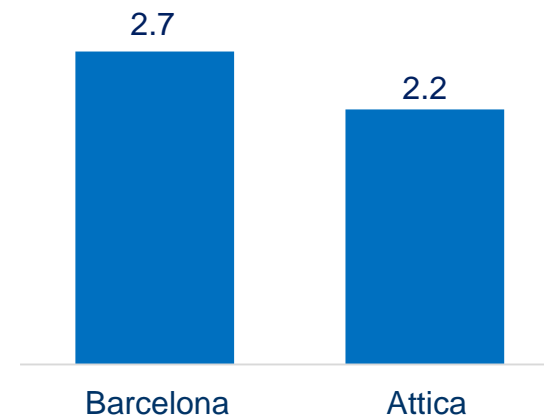
Arrivals by origin



Arrivals at hotels

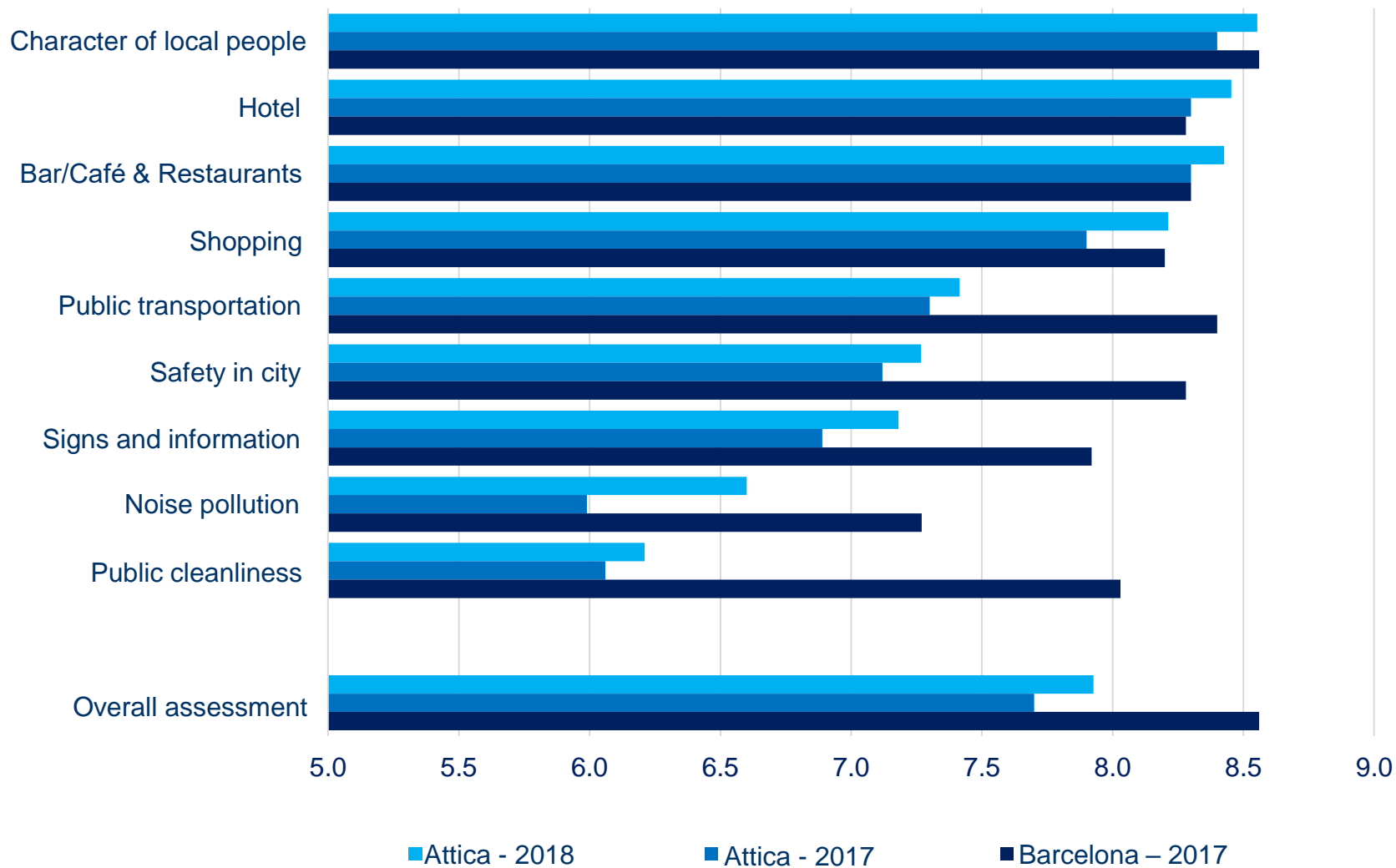


Length of stay



Province de Barcelona vs Attica

Satisfaction





Hotel Sector in Attica

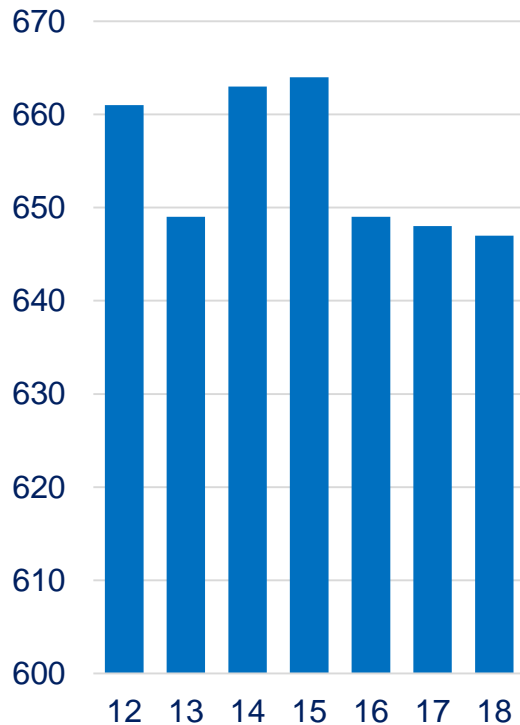
gbr
consulting



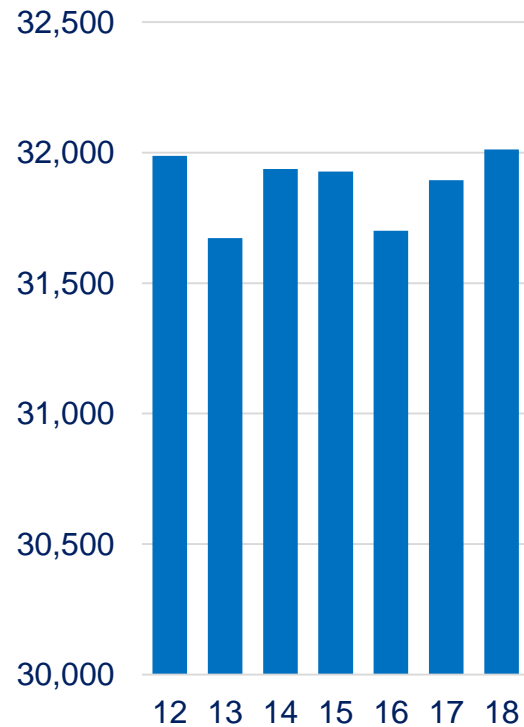
Hotel sector in Attica

2012 - 2018

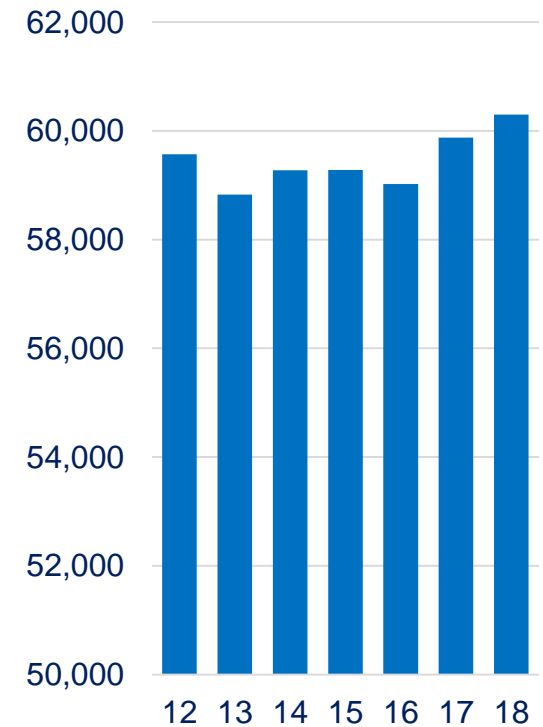
Hotels



Rooms



Beds



Source: Hellenic Chamber of Hotels, processed by GBR Consulting



Hotel sector in Attica

Number of hotels and rooms per area 2018



Area	Hotels	Rooms	Average rooms per unit
Central Athens	230	15,187	66
Argosaronic islands	199	4,260	21
East Attica	76	6,071	80
South Athens	47	2,696	57
Piraeus	42	1,653	39
North Athens	28	1,111	40
West Attica	14	678	49
West Athens	11	356	32
Total	647	32,012	49

Source: Hellenic Chamber of Hotels, processed by GBR Consulting



Performance

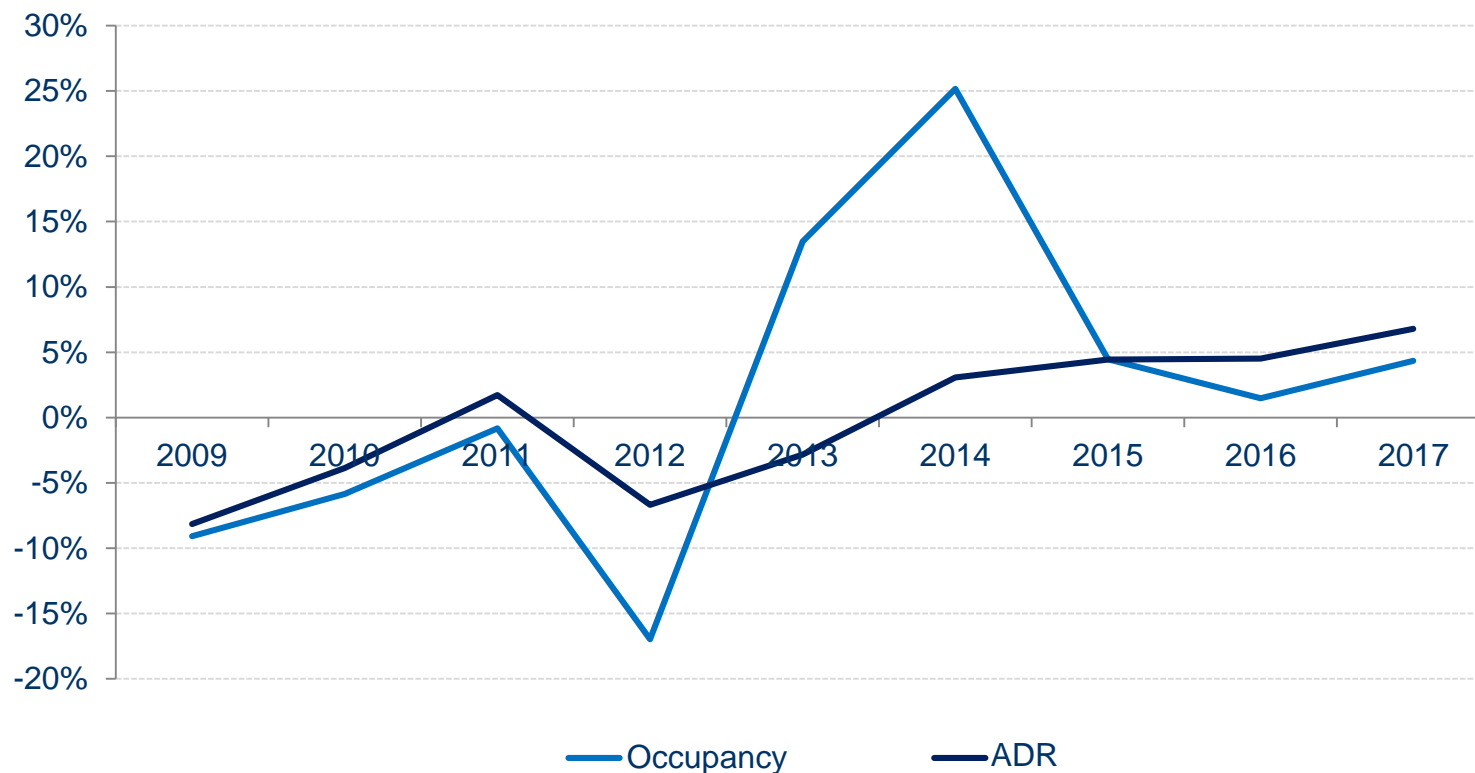
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Athens hotel performance

% change occupancy and ADR, 2008 - 2017

% change, YTD December

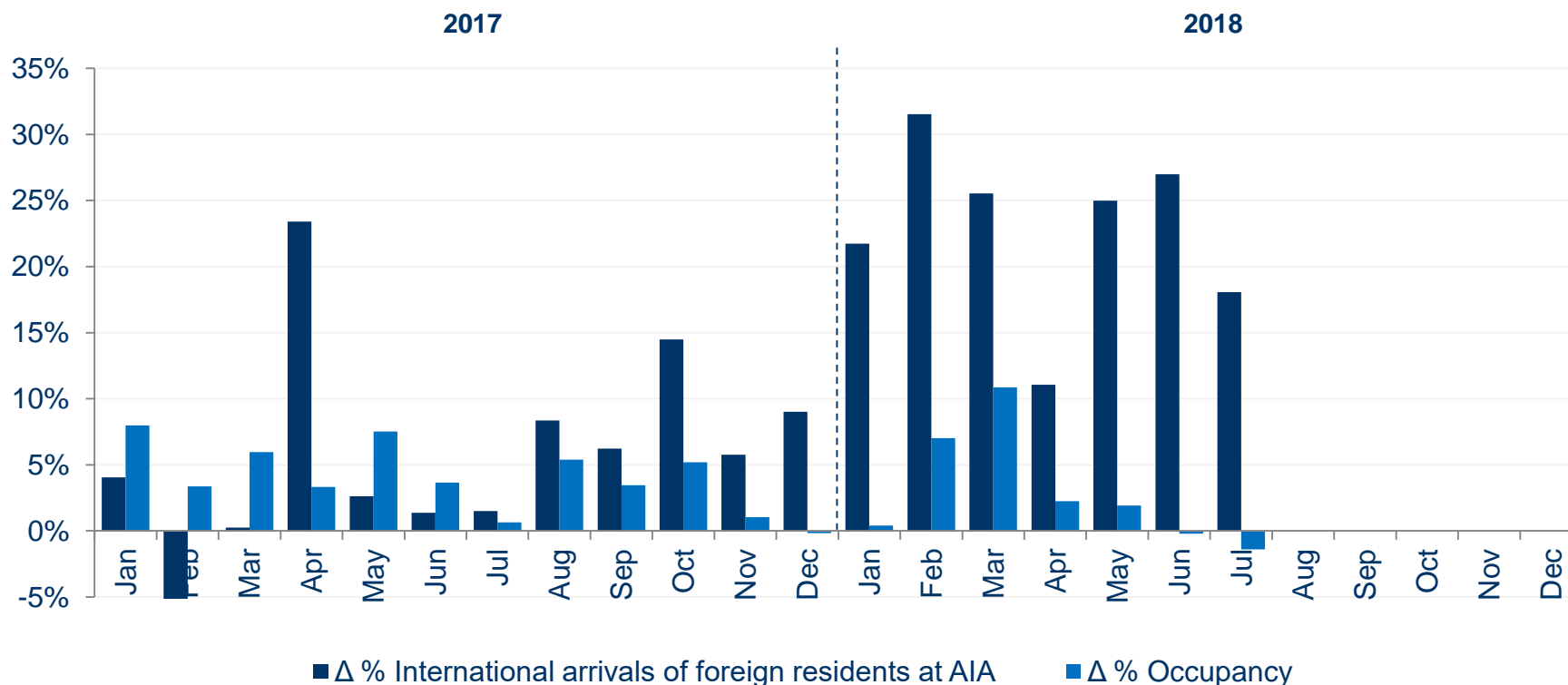


Source: EXAAA based on 32 hotels, analysis by GBR Consulting

Athens hotel performance

% change arrivals at AIA vs occupancy 2017 - 2018

% change YoY international arrivals at AIA and occupancy

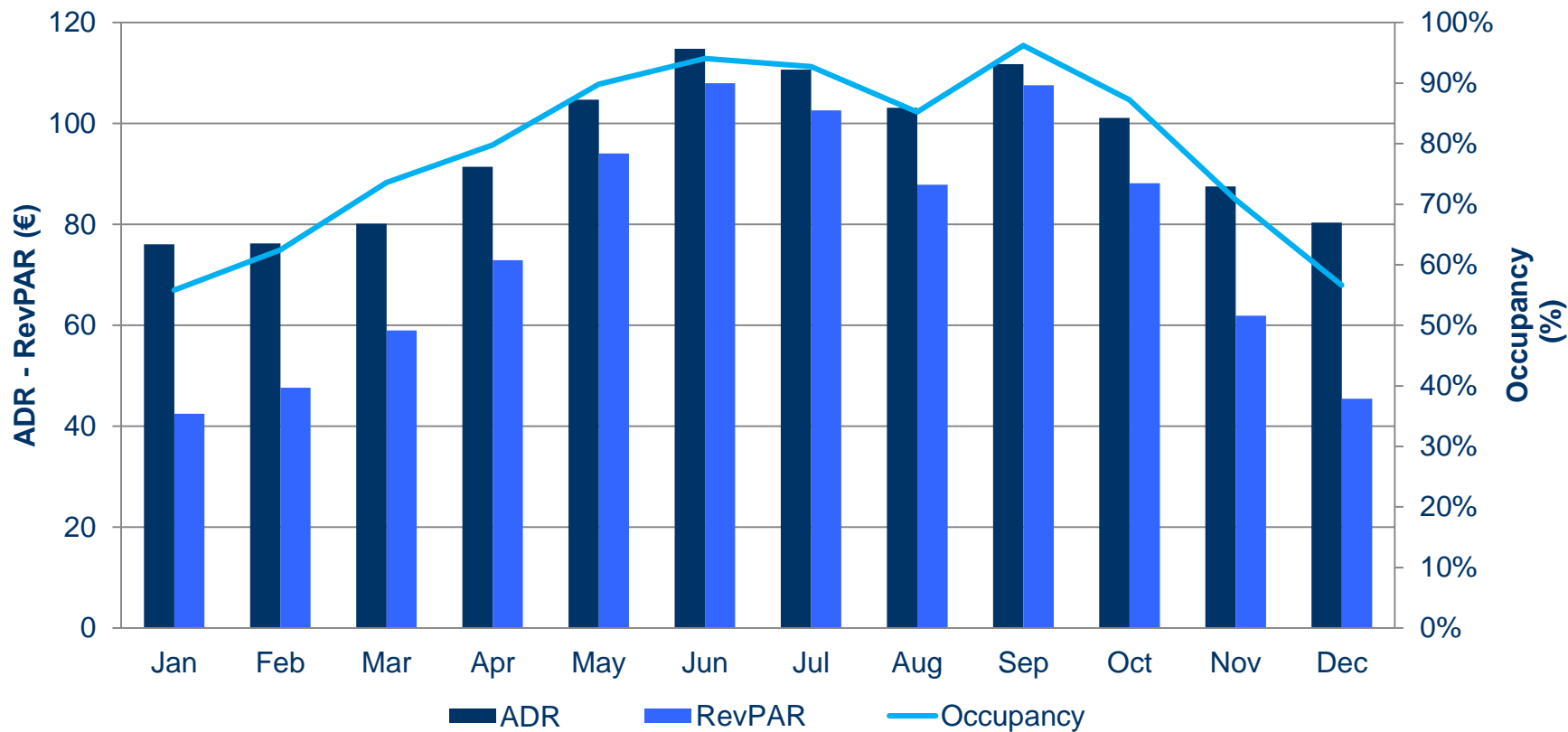


Source: SETE, EXAAA, analysis by GBR Consulting

Athens hotel performance

Seasonality

Monthly performance 2017



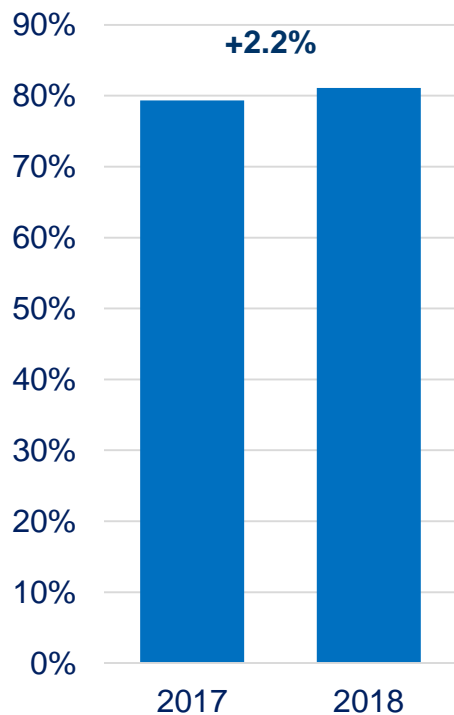
Source: EXAAA, analysis by GBR Consulting



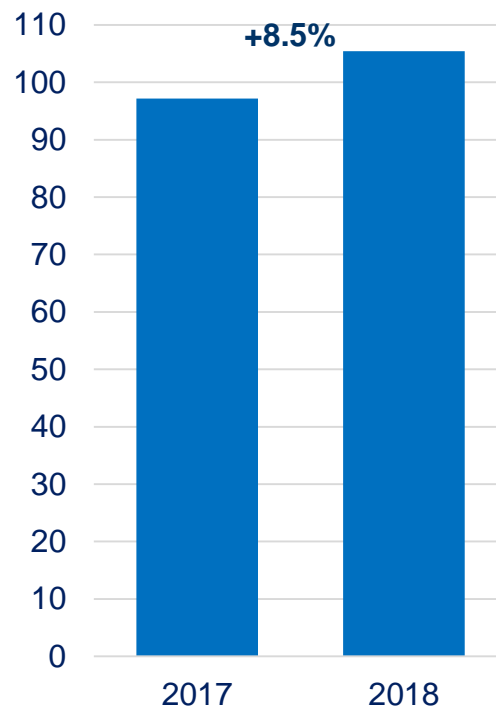
Athens hotel performance

Key indicators 2017 vs 2018, YTD August

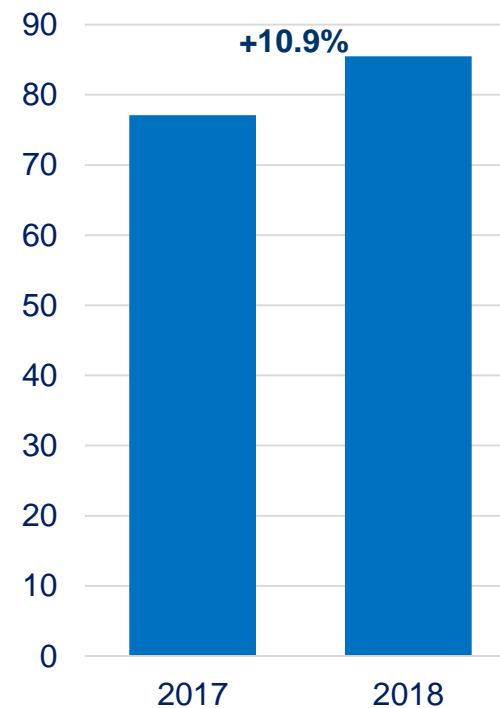
Occupancy



ADR (€)



RevPAR (€)

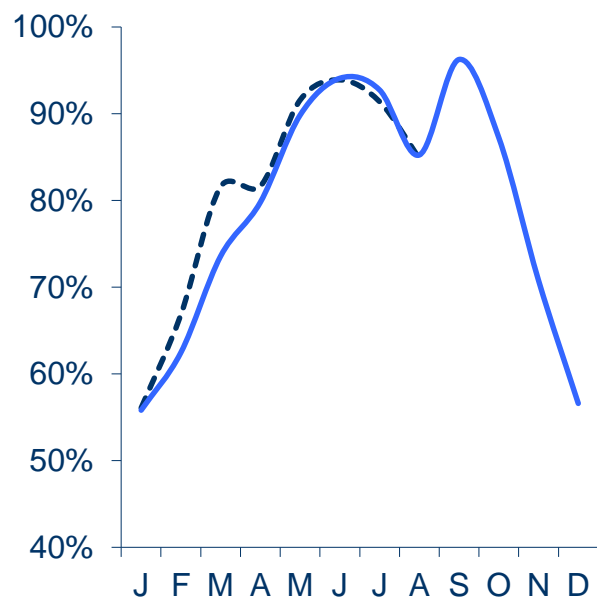


Source: EXAAA, analysis by GBR Consulting

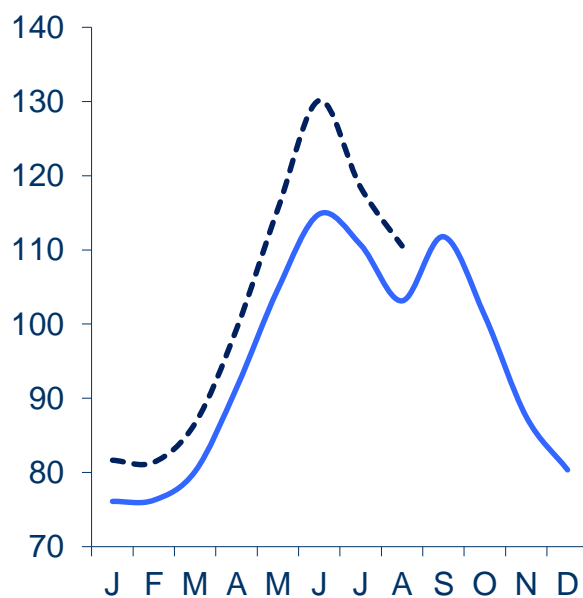
Athens hotel performance

Monthly performance 2018 vs 2017

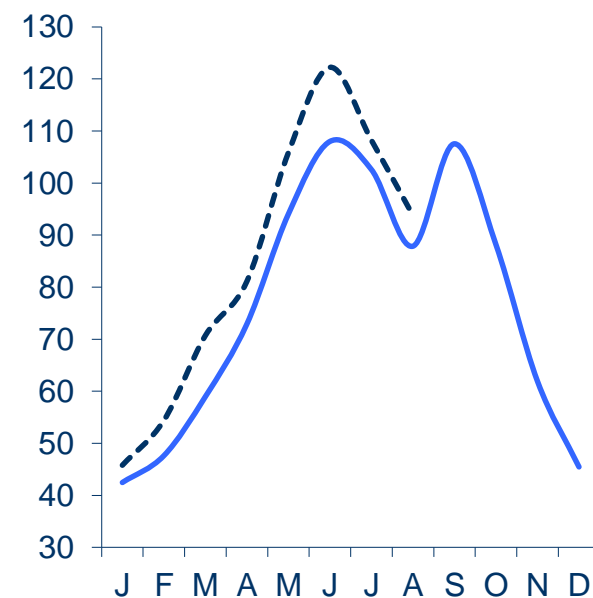
Occupancy



ADR (€)



RevPAR (€)



--- 2018 — 2017

Source: EXAAA, analysis by GBR Consulting



International benchmarking

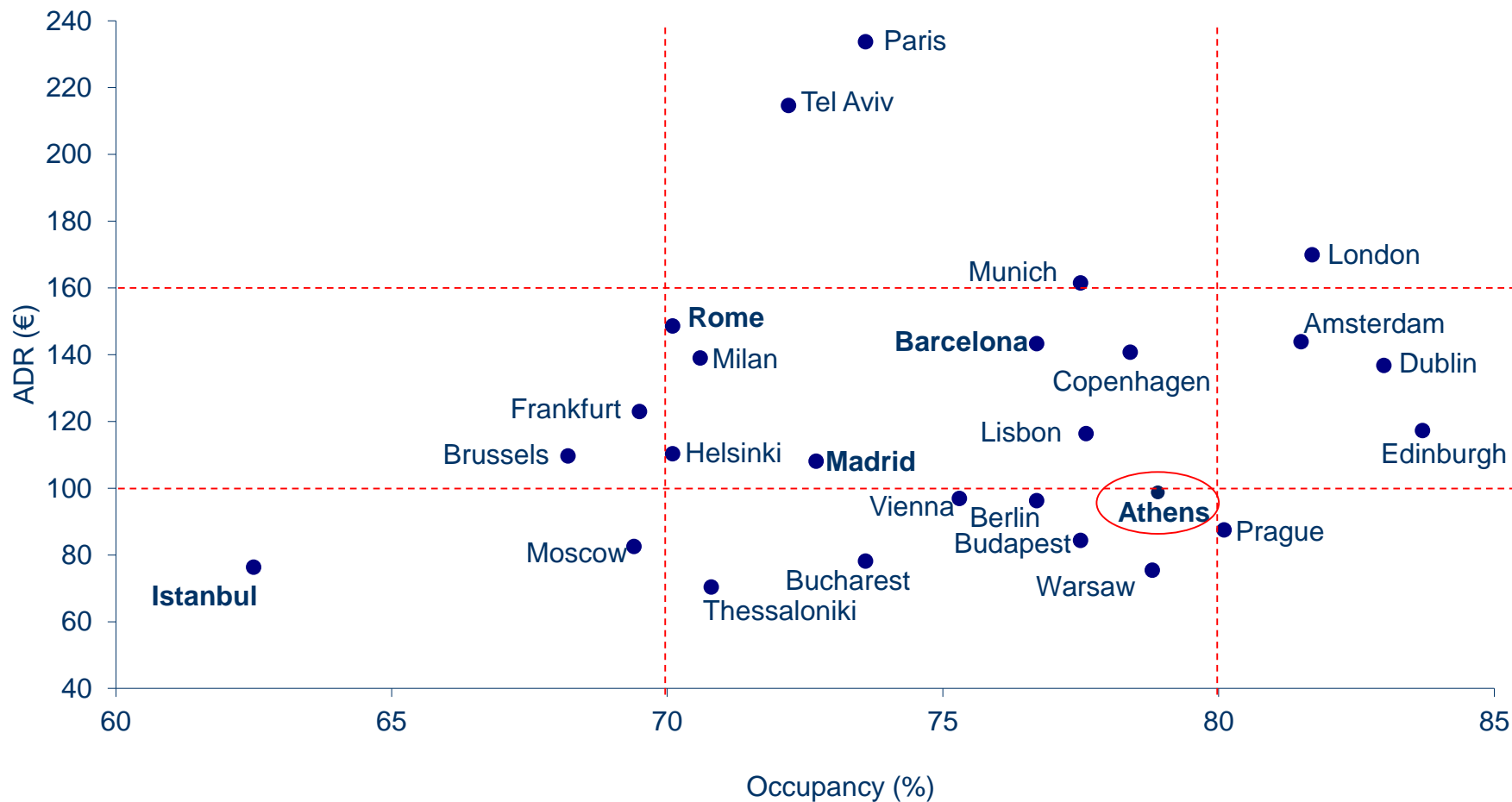
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International performance

European cities YTD December 2017

Occupancy and ADR

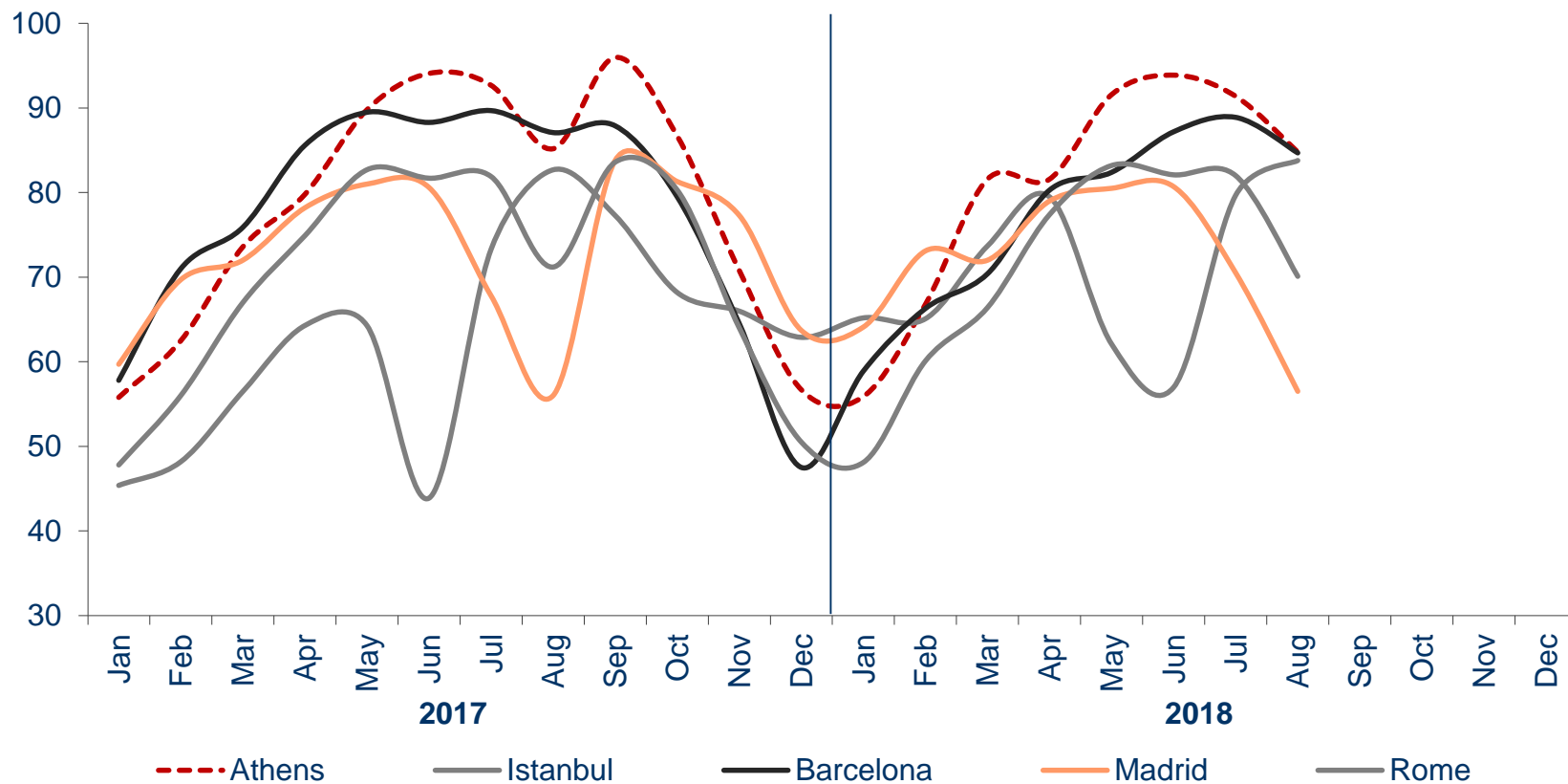


Source: STR Global, EXAAA processing by GBR Consulting

International performance

Athens vs Mediterranean destinations

Occupancy (%)

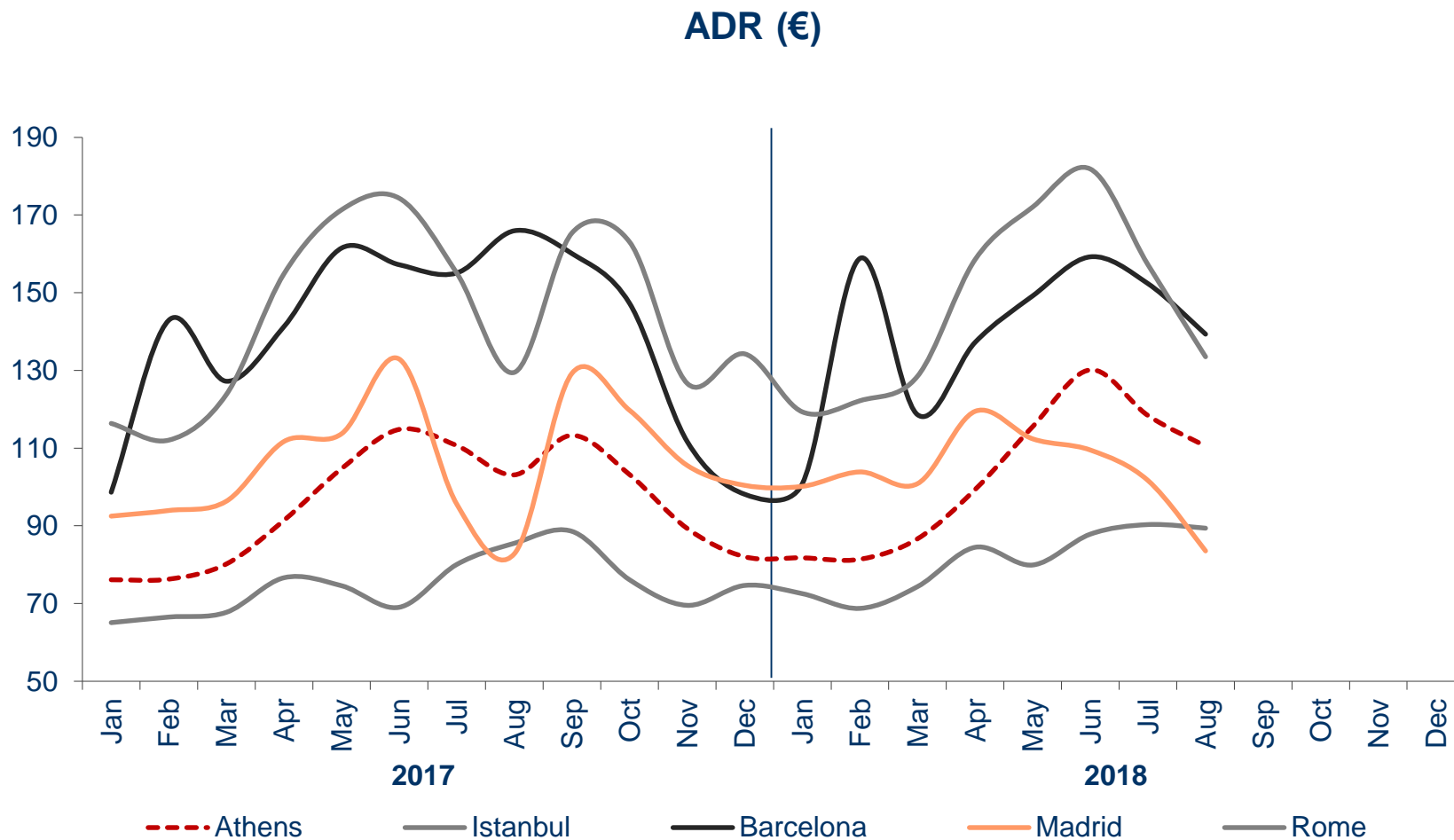


Source: STR Global, EXAAA processing by GBR Consulting



International performance

Athens vs Mediterranean destinations

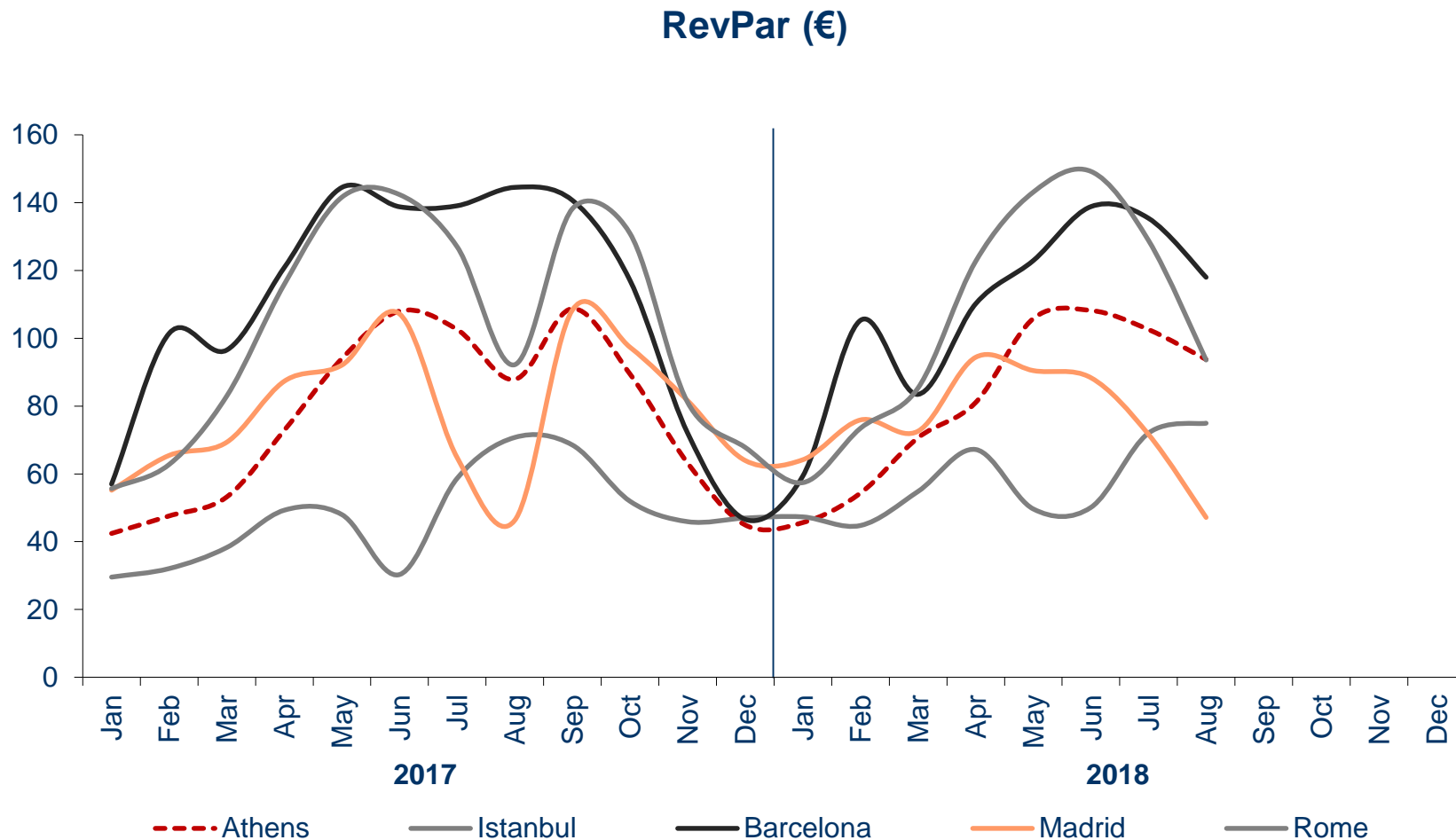


Source: STR Global, EXAAA processing by GBR Consulting



International performance

Athens vs Mediterranean destinations



Source: STR Global, EXAAA processing by GBR Consulting



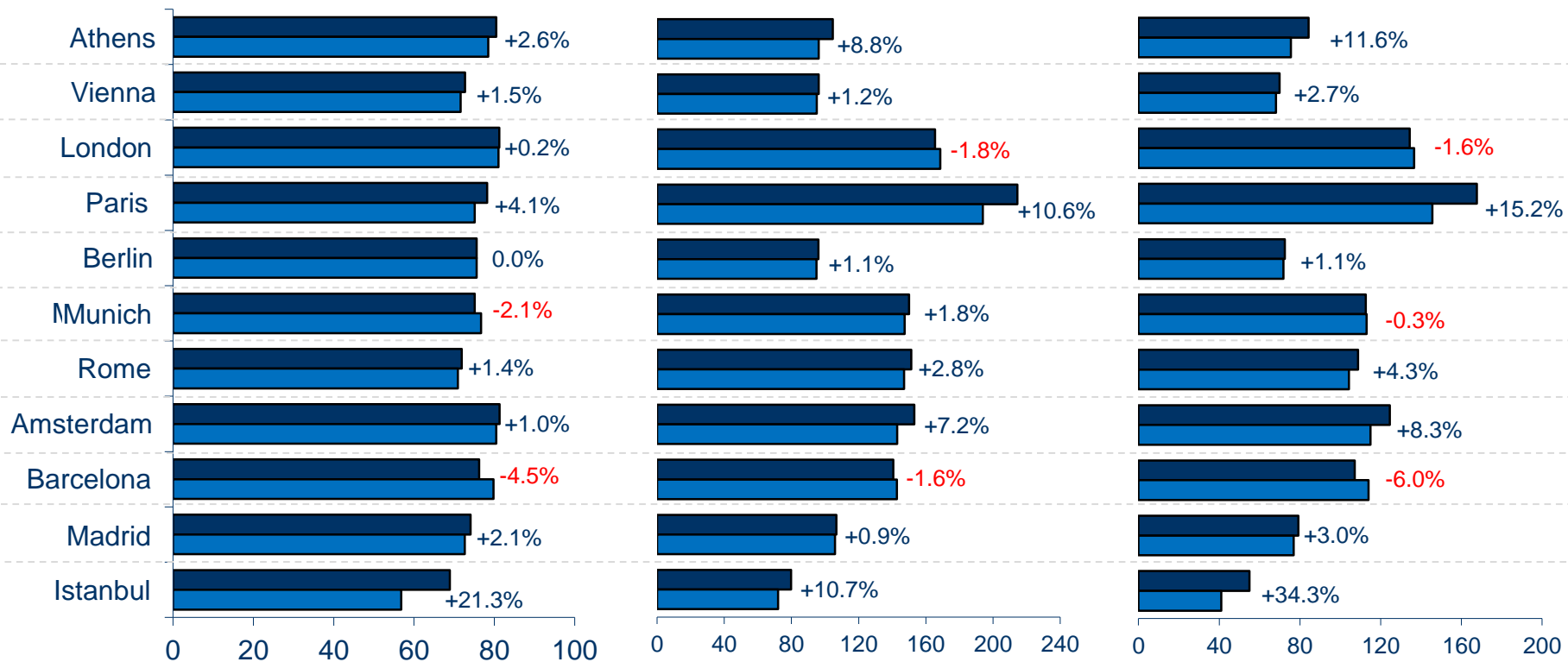
International performance

European cities YTD July 2018 - 2017

Occupancy

ADR (€)

RevPAR (€)



■ 2018 ■ 2017

Source: STR Global, EXAAA processing by GBR Consulting





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