



THE
Pair FUME
OF THE
ATHENIAN
SPRING

18TH AIRLINE MARKETING WORKSHOP



Trends shaping visitor demand in 2018



— Peter Jordan

— strategy

— research

— industry education

in this presentation:

top 10 destination marketing trends for 2018

ATP research methodology

what we found: perceptions & personas

what's next

top-10
destination marketing
trends for 2018

#1

Residents first



#1

Residents First

IN A NUTSHELL:

The social sustainability of tourism is a hot topic

‘liveability’ and localism have become the star attractions, but what does this mean for local residents?

Destinations big and small are rapidly having to re-evaluate the impact of tourism on local communities

This increasingly means navigating the turbulent world of urbanisation, populism and identity

#2

**Place branding,
not destination branding**

#2

Place branding not, destination branding

IN A NUTSHELL:

Destination' branding = tourism
but cities are about more than tourism

Place branding is the way forward

Two steps:

1. **place building:** making your city the kind of place that creative, talented people dream of settling in
2. **communication:** forging an identity that is authentic and understood by all stakeholders and stands out

#3

Partnerships in city marketing: a sign of strength



#3

Partnerships in
city marketing:
a sign of strength

TOPOSOPHY
DESTINATION MARKETING AGENCY

IN A NUTSHELL:

New challenges demand new solutions

DDMMOs are reinventing themselves through deep and meaningful partnerships

working with new players both inside and outside the tourism industry is helping destinations to get where they need to go.

It's a sign of strength, not weakness.

partnership funding = more room for new partners and more stability for future projects

#4

‘the borrowers’

#4

the "borrowers"

IN A NUTSHELL:



#4

the "borrowers"

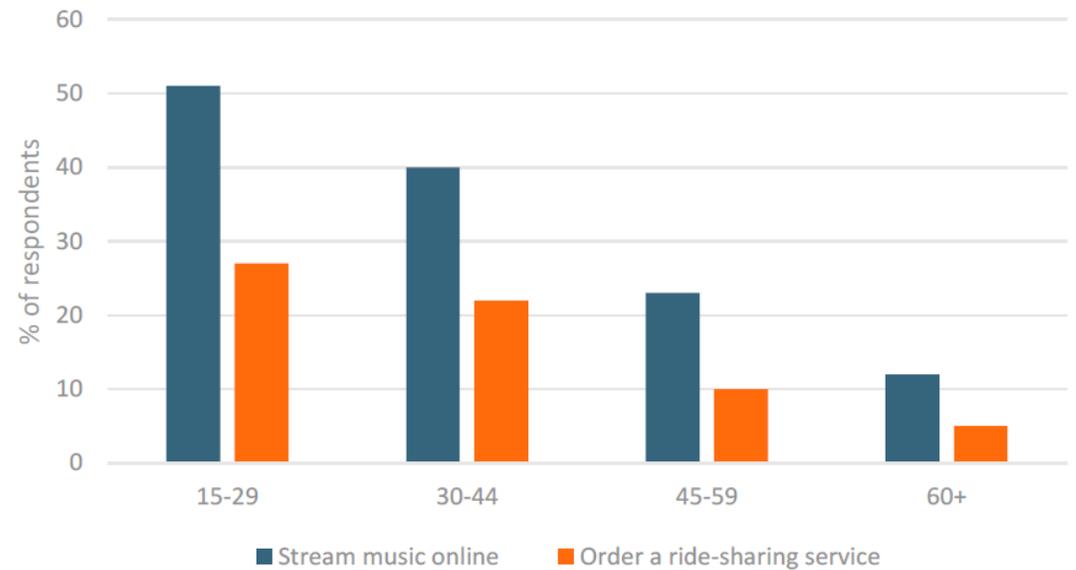
TOPOSOPHY
DESTINATION MARKETING AGENCY

IN A NUTSHELL:

"A new generation of community-minded sharers, renters and subscribers"

(Euromonitor 2018)

% of Respondents Using On-Demand Services via Mobile at Least Once a Week



Source: Euromonitor International's Global Consumer Trends Survey 2017

#5

Doing is the
new seeing



TOPOSOPHY
DESTINATION MARKETING AGENCY



#5

Doing is the
new seeing

TOPOSOPHY
DESTINATION MARKETING AGENCY

IN A NUTSHELL:

\$250bn

estimated value of tours and activities market

only

20%

of the global tours and activities market is online

Massive growth in:

- cooking classes (+51% US market)
- food tours (+49% US market)
- historic and heritage experiences

Shift from passive sightseeing to education, self improvement and active holidays...



#5

Doing is the
new seeing

IN A NUTSHELL:

“he who rests, rusts”

-German proverb

Consumers’ greater interest in physical and mental wellbeing is extending to holiday time

Travellers are combining city trips with quick escapes

Aquatic activities dominate top 10 US growth (TripAdvisor 2018)

_sunset cruises

_sailing

_kayaking

_canoeing



#6

Dining out is the main event



#6

Dining out is the
main event

IN A NUTSHELL:

Food & drink are occupying a greater share of
travellers' time and spending

it's part of a cultural shift:

TRADITIONAL
FOOD CULTURE

Planned
Rational
Utilitarian
Serious
Predictable
Functional
Economical

MODERN
FOOD CULTURE

Participative
Experiential
Special
Authentic
Adventurous
Pleasurable



#7

**We don't fit
in a box**

TOPOSOPHY
DESTINATION MARKETING AGENCY



#7

We don't fit
in a box

TOPOSOPHY
DESTINATION MARKETING AGENCY

IN A NUTSHELL:

we all like to mix
business with leisure (bleisure)

2 nights

business

6 nights

bleisure

Source: Expedia

#8

Context-based marketing

TOPOSOPHY
DESTINATION MARKETING AGENCY



#8

Context-based marketing

IN A NUTSHELL:

this year's biggest shift in digital marketing:

from pumping out pre-planned content to real-time automation where content is created, amended and distributed according to:

- _time
- _date
- _location
- _weather
- _and more

#8

Context-based marketing

IN A NUTSHELL:

location-based marketing and geo-fencing

geo-fenced venues that get it right will be truly eye-capturing and will boost spontaneous purchases:

- Info surrounding events, eg. sports matches, live concerts
- Interactive promotions – the ‘papertrail’
- Delivery and pick-up
- “Anytime” – chatbots are mixing social media and commerce

#9

Video: On

TOPOSOPHY
DESTINATION MARKETING AGENCY



#9

Context-based
marketing

TOPOSOPHY
DESTINATION MARKETING AGENCY

IN A NUTSHELL:

Video marketing continues to undergo a meteoric rise

#10

The era of permanxiety



#10

The era of
permanxiety

TOPOSOPHY
DESTINATION MARKETING AGENCY

IN A NUTSHELL:

Whether close to home or far away, terrorism, cyber attacks, natural disasters and volatile politics may be out of your control, but your response to them isn't.

Who's in your crisis coalition?

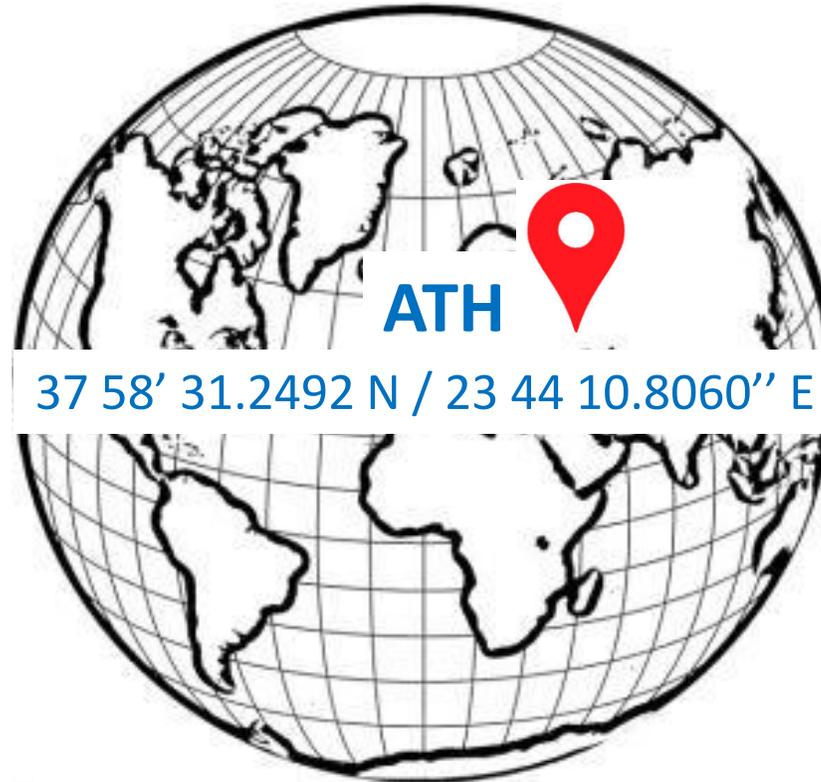
Focus on Athens

Athens' dynamic support – Destination marketing – Strategic cooperation - Synergies & more...



Targeted Partnerships with Airlines

Athens Tourism Partnership (ATP) a unique combination of partners with diverse know – how



Mission: challenge consumer trends & misperceptions of Athens as a city break destination by showcasing the wider breadth of tourism assents the city has to offer

Athens Tourism Partnership in action...

1st Phase

When: January – July 2017

Target Audience: Germany & France city breakers

Channels: Social media & networks

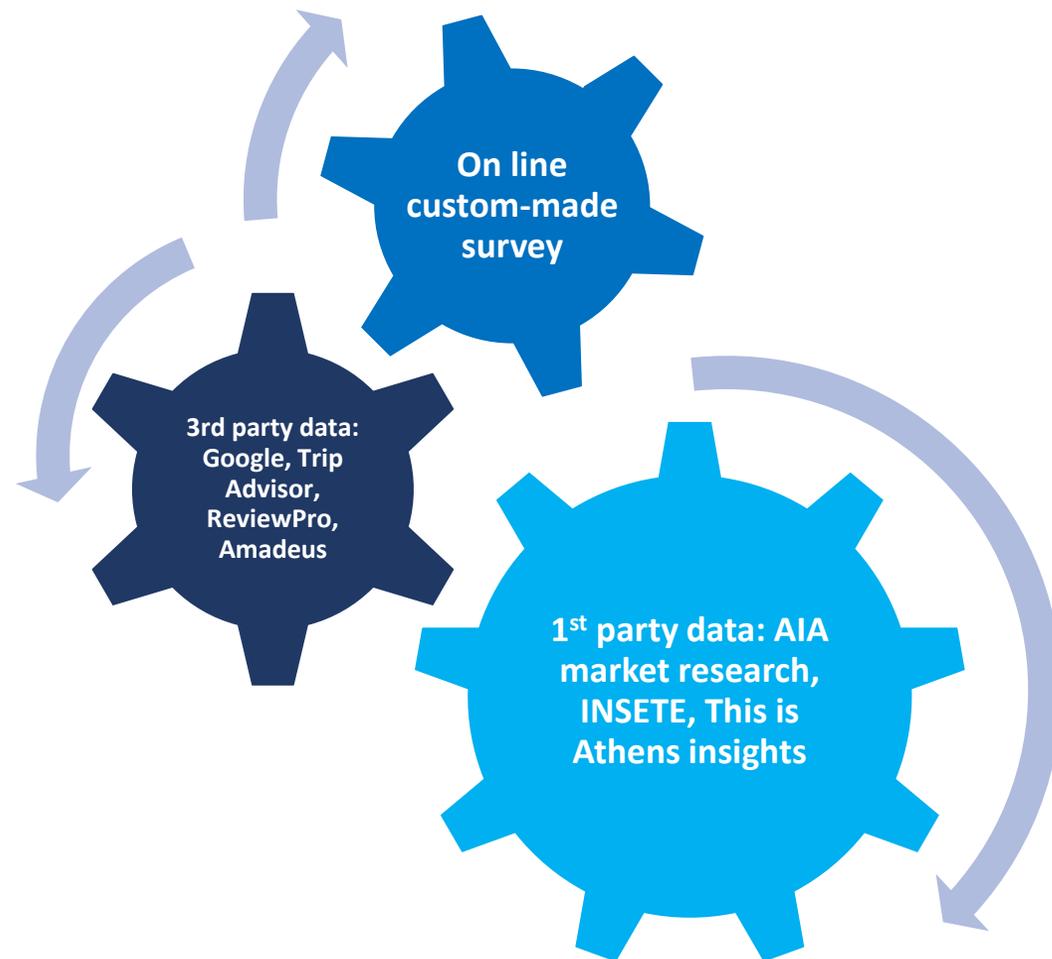
Purpose: Awareness of ATH city

Message: "One city ...never ending stories"



Data triangulation to capitalize on “Knowledge Creation”

2nd Phase: enhance market targeting by providing more specific trends, communication guidelines with the ultimate aim to attract and engage more ATH visitors through all seasons



The alteration of a traditional definition...

City break: Not just a long weekend but even short visit before or after vacations



24%



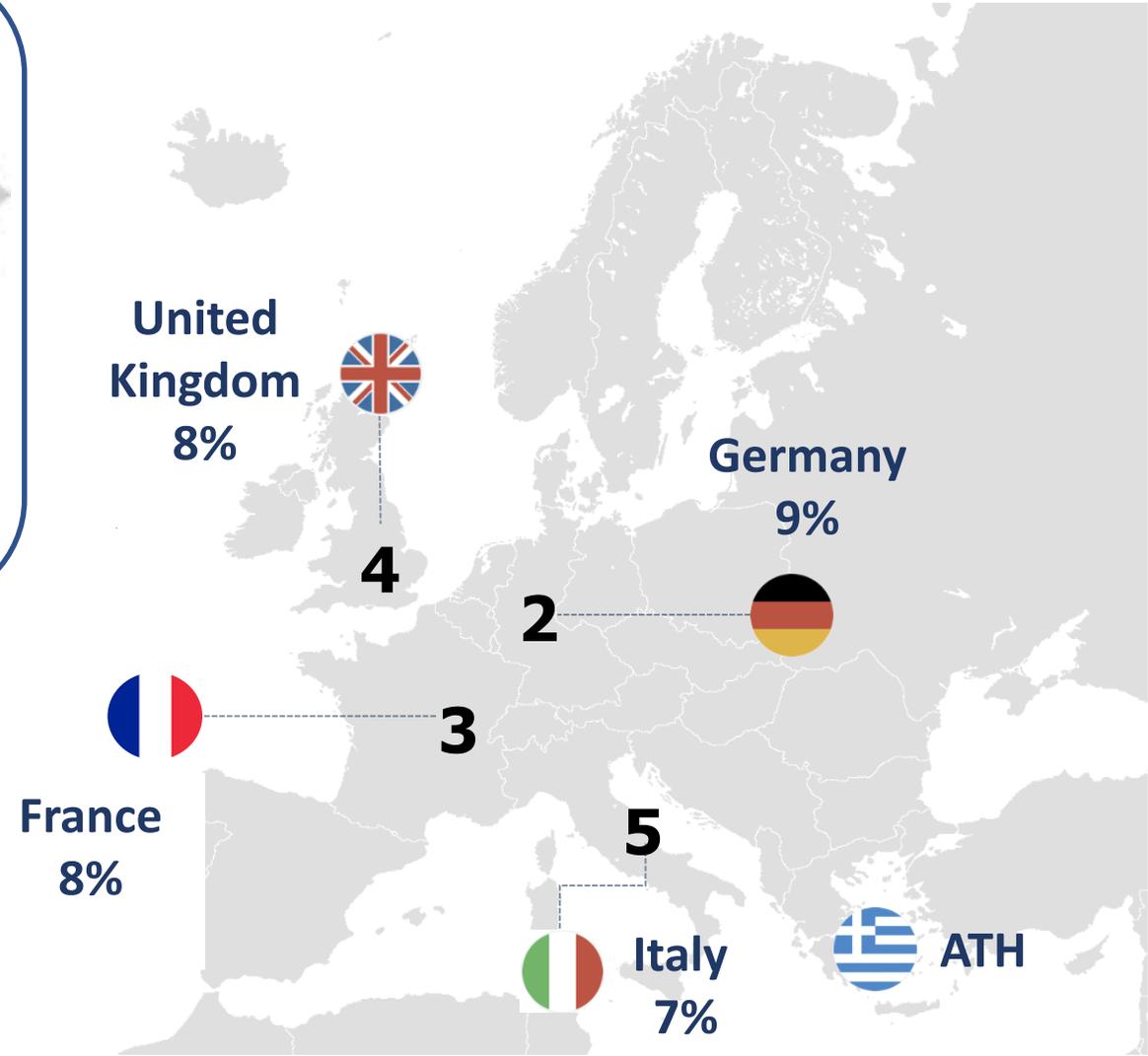
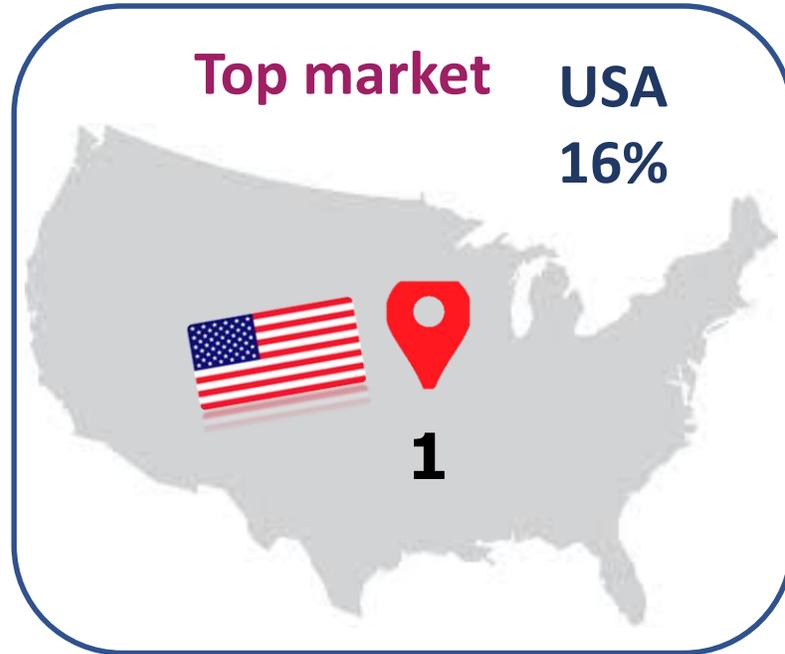
52%



24%

- **36%** of city breakers stayed in Athens without visiting another place in Greece
- The average length of stay in Athens was **5 days**, while most of the visitors spent **11 days** in Greece

City breakers climbed from 230,000 in 2013 to 1.4 million in 2017, originating mainly from...



Although summer is still peak month, city breakers seem to travel more during the spring months than typical vacationers



Spring
22%
(Vacationers 18%)



Summer
38%
(Vacationers 44%)



Autumn
29%



Winter
11%



the ATP research_

data beats opinions_

Research Framework

WHO'S OUR CLIENT?

Exploration & Analysis of 1st Tier Markets:

- . USA
- . Germany
- . France
- . UK
- . Italy

WHAT DO THEY THINK OF US?

Understanding how different types of city travelers (forthcoming/potential visitors, repeaters, etc.) perceive Athens as a tourism destination.

WHERE WE STAND AGAINST OUR COMPETITORS?

Understanding how Athens scores versus other city destinations in Europe (major MED destinations, cultural Meccas, major Balkan destinations, etc.) in each of the 5 markets.

Methodology_

1. DESK RESEARCH

Collection & Analysis of:

- 200+ domestic and international resources
- reports on destination trends
- consumer trends, digital trends, and outbound travel trends

2. SUPPLY OVERVIEW & COMPETITION ANALYSIS

Evaluation of specific products, overview of best practices by competitors and their campaign attributes

3. ONLINE SURVEY – QUESTIONNAIRE DESIGN

We asked a sample of 5.000+ respondents:

.Geodemographics (e.g. resident city, income)

.City trip characteristics (e.g. preferred city trip period)

.Amadeus psychographic items and purchasing behavior

(e.g. inspiration sources, planning channels, favorite activities)

.Intention to visit Athens and perceptions of travelers who have/have not visited Athens and who also intend/do not intend to visit/revisit it

FROM 1ST TIER MARKETS TO KEY TARGET MARKETS

A variety of 2nd and 3rd party sources were used to corroborate evidence and findings derived from the online survey:

Data
Triangulation_



Pollfish



tripadvisor®



Google Trends

meet the personas_

■ the smart way to profile our visitors_



US: Reward Hunters

Age 25-34, travelling with: Spouse/partner

Keywords: Luxury, self-improvement, reward, stunning views, romance, gastronomy, Instagram, cultural immersion, boutique hotel

Travel Style

- . They see the way they travel as a reflection of their lifestyle
- . Indulgent 'must have' experiences that lead to self-improvement and self-development
- . Big fan of city trips: 1 in 4 will visit city destinations in Europe 3+ times within the next 2 years
- . Food experiences of all kinds are a must, especially gourmet, food tours and food as an introduction to culture

Top Stats

- 72% like to indulge themselves with 'extraordinary experiences'
- 60% find that premium quality services are their top priority
- 47% believe that 'price is a secondary concern'
- 73% like to 'lose themselves in the local culture and local way of life'



US: Reward Hunters

Meet Maddie, A determined, yet indecisive city experience seeker.

Who is she?

- . Annual income: \$45,000
- . 28 years old, in a stable relationship
- . Top on her European city wishlist:
Barcelona, Madrid, Rome
- . An active social media user and recent user of P2P platforms
- . A foodie with a keen interest in different gastronomic experiences
- . A heavy smartphone and/or tablet user

Her Customer Journey

- Step #1
Instagram inspiration
- Step#2
Personal Travel Consultant
- Step #3
4-6 months in advance
- Step #4
Bespoke Package with Luxury Highlights.

Her Athens Highlights

- . 5-7 nights, combined with another European city
- . Quick overview of archeological sites, but prefers cultural immersion (food tours, meet the locals)
- . Looks for gourmet dining and great nightlife
- . VIP personal daytrip tour out of the city to see monuments and eat lunch by the beach
- . Uses Instagram, advice from personal travel consultant, TripAdvisor and tips from locals to get around



US: Simplicity Searchers

Meet Dave, A hard working dad looking forward to a European family break.

Who is he?

- . Annual income: \$80,000
- . 45 years old, married
- . Top on his European city wishlist: London, Barcelona, Rome
- . Uses smartphone mainly for email and light browsing when travelling
- . Prefers to plan and book travel using desktop
- . Has frequent traveller status with a major US airline and hotel group
- . Enjoys spending quality time with his family

His Customer Journey

Step #1

Browses traveller review sites for destination tips

Step#2

Searches packages offered by his preferred airline and hotel brands

Step #3

3-4 months in advance

Step #4

Books package with all transfers and tours included

His Athens Highlights

- . 3-4 nights, plus a stopover in another southern European city and two nights on a Greek island
- . Goes to see Acropolis but also dedicates time for relaxing by the hotel pool
- . Looks for pleasant, family dining, eg. typical taverna in Plaka
- . Uses TripAdvisor, Frequent Flyer advice page and hotel concierge to get around



IT: Italian Cultural Purists

Meet **Elena & Isabella**, a mother and daughter organising their family's next Mediterranean trip

Who are they?

- . Elena (mother): €20,000 part time, Isabella (daughter): €36,000 full time
- . Elena: 58 years old, married, Isabella: 31 years old, also married with one son (8 years old)
- . Top on the family's European city wishlist: Barcelona, Rome, Vienna, Edinburgh
- . Elena prefers to collect ideas from reading history books, travel guides and watching TV documentaries. Isabella occasionally uses social media and asks friends for tips online

Their Customer Journey

- Step #1
Inspired by TV documentaries and YouTube videos about Greek history and culture
- Step#2
Books flights and large apartment on P2P site, but nothing else
- Step #3
Books 1-3 months in advance
- Step #4
Arrive in destination then explore using blog advice

Their Athens Highlights

- . 4-night stay during Easter holidays, staying in large rented apartment
- . Elena spends extended period at Acropolis and archaeological sites
- . Isabella and her husband go for a night out at local live music venue and typical neighbourhood restaurant



DE: Social Capital Seekers

Meet Stefan, looking for a sunny Mediterranean getaway with his girlfriend

Who is he?

- . Salary: €70,000
- . Age: 30, with partner
- . Top on his European city wish list: London, Barcelona, Stockholm, Vienna
- . Often travels in Europe for work
- . Looking for sunshine and plenty of photogenic opportunities for fun

His Customer Journey

- Step#1
Sees friend's Instagram and Facebook posts from Mykonos and wants to try something different
- Step#2
Researches widely with smartphone but gets travel agent to do offline booking
- Step#3
Books 1-3 months in advance
- Step#4
Books boutique hotel and shares online all the attention he gets

His Athens Highlights

- 3 nights, staying in the suite of a boutique hotel
- Visit city markets, eat street food then go to SNFCC for architecture tour
- Enjoy cocktails with great views while chatting with locals to plan night out
- Enjoy city centre life, but always on a quest to find something new



DE: Ethical Travellers

Meet **Julia**, an environmentally aware mother of two teenagers, looking for some winter sun

Who is she?

- . Salary: €39,000
- . Age: 48, married
- . Top on her European city wishlist: Amsterdam, Prague, Vienna
- . Works in human resources at a human rights charity
- . Prefers travelling in Germany and nearby countries, taking only 1-2 flights per year
- . Wants an early spring break to escape the cold weather in Germany

Her Customer Journey

Step#1

She is inspired by a responsible travel agent at a trade fair

Step#2

Researches widely, then arranges trip via email with specialised travel agent

Step#3

Around 4 months in advance

Step#4

Books flag carrier airline and stays at modern hostel with private rooms

Her Athens Highlights

4 nights, balancing time in city with walks in surrounding countryside and island day trip

Buys food at local market to prepare at the hostel

Takes part in hostel's tour to local refugee centre and helps out

Enjoy neighbourhood life, and exploring city and surrounding area with public transport



UK: Simplicity Searchers

Meet Kevin, looking for a cultural stopover during his next family holiday in the sun

Who is he?

. Annual income: €36,000

35 years old, married

. Top on his European city wishlist: Barcelona, Paris, Rome, Venice

. Uses smartphone and tablet regularly, for browsing and booking

. Has taken trips to the Mediterranean before with his family, and when younger with friends

. Looks for a stress-free break in the sun with his wife and two daughters (aged 7 and 9)

His Customer Journey

Step#1

Has tried Greek food at in UK and wants to eat the 'real thing'

Step#2

Researches with OTA but uses OTA's customer care to book total trip

Step#3

Books 4-5 months in advance

Step#4

Uses Facebook and TripAdvisor for recommendations

His Athens Highlights

2 night stopover on the way home from Greek island package holiday

Sticks to walking around the main tourist districts and sites, worried about straying further

Enjoys visiting a real taverna and sampling different things on the menu



FR: Obligation Meeters

Meet Philippe, a stressed Parisian looking to take his wife away for a low-season city break

Who is he?

- . Salary: €40,000
- . Age: 35, married
- . Top on his European city wish list: London, Dublin, Oporto, Lisbon
- . Philippe is a policeman, wife is a primary school teacher
- . They don't usually travel abroad much
- . They are restricted to school holidays and official time-off periods

His Customer Journey

- Step#1
Gets ideas on where to go from friend's Facebook photos
- Step#2
Reacts to price alerts from his preferred OTA and budget airline
- Step#3
Books 2-4 weeks in advance
- Step#4
Books simple package with serviced apartment and cheap flights

His Athens Highlights

- 2-3 nights, staying in a serviced apartment in the city centre
- Sticks mostly to the main tourist areas, plus an 'excursion' to a new neighbourhood
- Enjoys small shops, restaurants and bars and discovering neighbourhood life

Thank you

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Encouraging potential visitors to go from "Awareness" to "Experience"...



What's next?



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