



**Horwath HTL**

*Hotel, Tourism and Leisure*

SENTIMENT SURVEY

**Greece**  
*Travel Sentiment*

JULY 2020

## Introduction

The Greek Government managed the Covid-19 pandemic with an impeccable manner. The PM understood very quickly, that despite the political and economic risk, the country should get into a lock-down mode immediately. He also understood that the Government should let the epidemiologists do their work with no obstacles, and invested into Greeks' understanding, patience and willingness to follow the rules and support one another. He implemented a thorough decision-making model that had distinctive phases, a fast and constant pace all of which delivered excellent results. Greece is one of the few countries with a small total number of deaths and COVID-19 cases.

Already into the summer season, the big bet is on Tourism. Greece is almost completely dependent on Tourism with the industry producing nearly 25% of the annual GDP and we are now deep into, probably, the most challenging season in our tourism history.

Hotels and destinations need to overcome the initial shock and quickly understand the new environment within which, they need to operate. An environment with almost zero bookings, a crashed demand, increased operational costs, health & safety protocols and procedures, closed borders, different sentiments among people, different needs and a shortened season that will most probably become less than 80 days and domestic-oriented.

The first 20 days of July will probably be the most important for the Greek holiday season. Those who choose to visit, will almost immediately start communicating their experience. Friends, relatives, co-workers will start asking if the destinations are trustworthy and protocols are in place.

## The Survey

Trying to understand the major concerns visitors to Greece are facing, Horwath HTL Greece implemented an online panel sentiment survey between 8 - 22 June 2020. We surveyed 1,000 people from 12 Markets: Austria, Belgium, Bulgaria, Germany, Denmark, Spain, U.K., Israel, Italy, Netherlands, Sweden, U.S.A. in different age groups: 18-24, 25-34, 35-44, 45-54, >54, both male and female.

Over the following pages we present our findings regarding the major concerns that potential visitors have, the percentages of last-minute travelers, the positioning of Greece within their choices and other very important elements.

If we are not ready to tackle these important first 20 days of July 2020, then we are doomed to live our modern "Greek Tourism Odyssey".

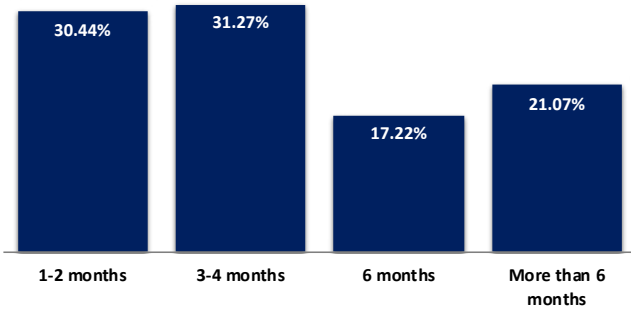
## Conclusion

The Covid-19 pandemic managed to crush a 6-year momentum in Greek tourism. We cannot be certain about the 2020 results and unfortunately, neither can we make any kind of projections or scenarios, as the available data changes on a daily basis.

On the other hand, the element of trust remains one of the most important factors, when it comes to deciding when and where to travel abroad. According to the respondents of our survey, Greece remains a safe and trustworthy destination, controlling the course of the pandemic and minimizing the impact on the destinations.

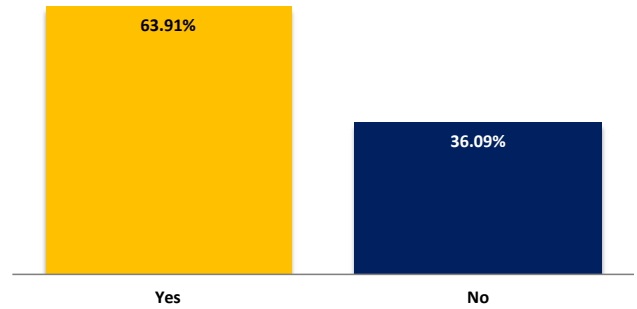
What Greek Tourism must manage over the following months, is the experience and the expectations that the first travelers have. If Greece generates a positive 'Word of Mouth' effect during July 2020, then there is a high possibility of seeing an increase in last-minute bookings during August and September and get a better starting position for a more prosperous 2021 season.

Once the travel ban is lifted, how soon are you likely to travel for leisure/holidays?



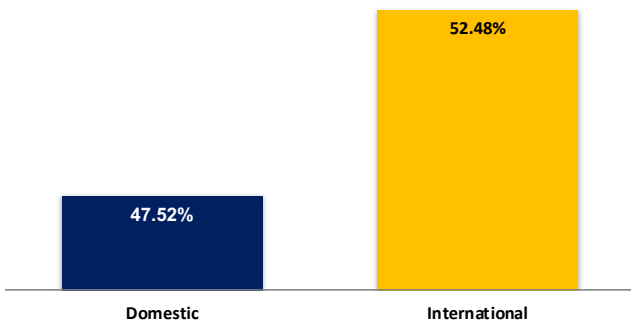
- Almost 2/3 of the respondents, answered that once the travel ban is lifted, they would wish to travel for vacations within the time period of 4 months.
- 30,44% of those would consider traveling for leisure within the period of 2 months, creating last-minute demand for destinations.

Do you feel safe to take a flight?



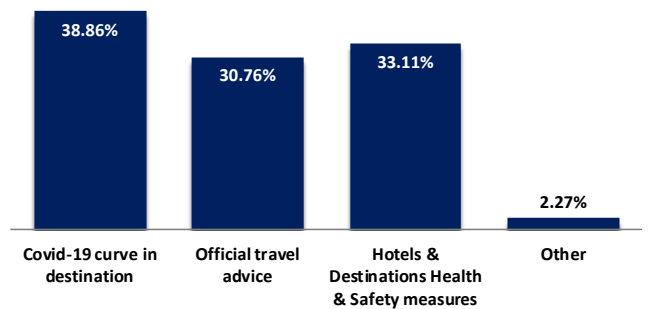
- Almost 2/3 of the respondents (63,91%) answered that taking a flight is safe, indicating that air travel will continue to be a common way of transport.

Will you choose a domestic or an international destination?



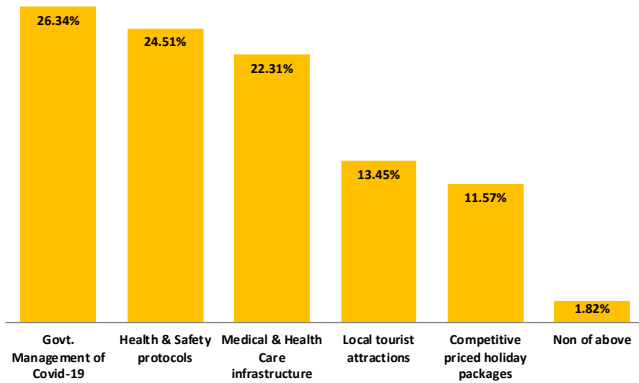
- 52,48% of the respondents, answered that they would choose an international destination for their first leisure trip.

What information do you need in order to feel safe for traveling to a leisure/holiday destination?



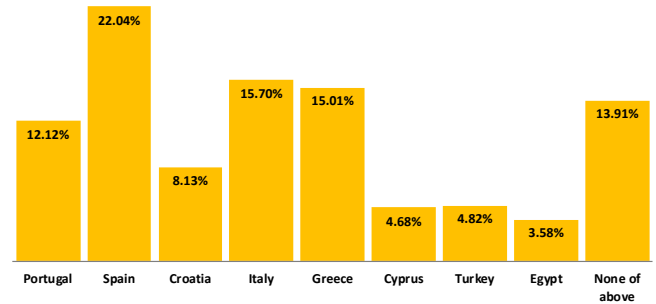
- Almost all the respondents will search information about the course of the pandemic in the destination of interest (38,86%), search the measures that the hotels and destinations are taking (33,11%), and consult the travel advice of their country of origin (30,76%).

### What will influence your leisure/holiday destination selection?



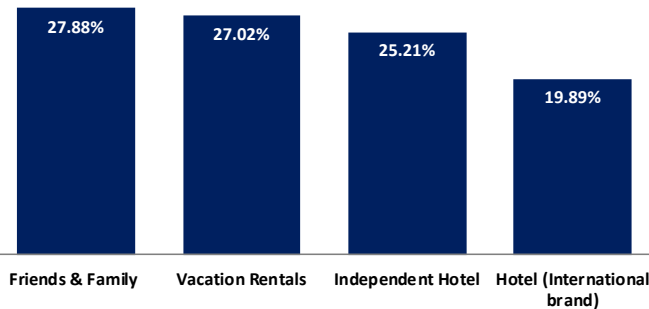
- In the short-term post Covid-19 era, the local tourism attractions (13,45%) and the competitively priced packages (11,57%) will not be major decision indicators.
- Respondents answered that the 3 factors that would most influence their destination selection was how the Government handled the pandemic crisis (26,34%), information on the implemented health & safety protocols (24,52%), and the Medical & Healthcare infrastructure of the destination (22,31%).

### Which Mediterranean destination would you consider for your first international holiday?



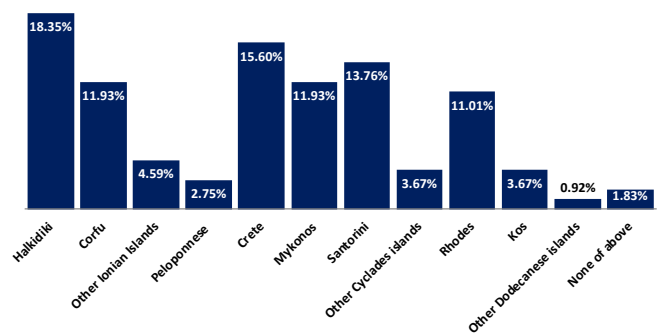
- Spain (22,04%), Italy (15,70%) and Greece (15,01%), hold the top 3 positions among the Mediterranean destinations
- Even though Greece was always among the top destinations of choice in the Mediterranean, it seems to be gaining momentum due to the Covid-19 management and the positive image generated.

### What type of accommodation would you most likely book?



- 45% of the respondents will most likely choose a hotel for their accommodation (25,21% independent hotel, 19,89% a hotel member of an international brand).
- 27,02% will most likely choose vacation rentals (Airbnb type, rooms to rent, self-catered accommodation), while 27,88% will most likely choose friends and family accommodation.

### Which one of the following destinations in Greece would you consider for your next holiday travel?



- Halkidiki (18,35%), Crete (15,60%), Santorini (13,76%), Corfu/Mykonos (both 11,93%), and Rhodes (11,01%) are the top destinations in Greece that the respondents will consider for their holidays.

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## Horwath HTL

At Horwath HTL, our focus is one hundred percent on hotel, tourism and leisure consulting. Our services cover every aspect of hotel real estate, tourism and leisure development.

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We are a global Brand with 47 offices, who have successfully carried out over 30,000 assignments for private and public clients. We are part of Crowe Global, a top 10 accounting and financial services network. We are the number one choice for companies and financial institutions looking to invest and develop in the industry.

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# Horwath HTL

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