14/6/2022

Australia: market trends

Results of primary research

(Annual Action Plan 2022, project 1.2.1.)

Ministry of Tourism
General Directorate for Tourism Policy
Directorate for Research
Department for Research Studies and Documentation

Cite as:
Ministry of Tourism of Greece (2022). *Australia: market trends. Results of primary research*. General Directorate for Tourism Policy, Directorate for Research.

Table of Contents

Introduction

As part of the Directorate for Research's obligations in the Annual Action Plan 2022 (project 1.2.1), this overview captures primary quantitative and qualitative data on the Australian market. Included in the two sections are the results from the following research has conducted by the Directorate of Research:

A) in section 1, the results of wider quantitative research on the profile of visitors to our country through the VisitGreece application can be found. The results for the Australian market are summarized specifically.

B) In section 2, the results of qualitative research on the travel preferences of Greek expatriates in Australia can be found. The purpose of this research is to record the travel profile of the members of the Greek-Australian community, a market loyal to our country and for which we could further investigate their options when traveling to Greece (i.e. activities at the destination, options for travel within the country, with whom they travel, preferences by age group and by generation of immigrants, travel time, distribution of tourist expenditure). The field research complements the secondary research for the Australian market (desk research), which has already been completed (with no. 1223/6.5.2022 Briefing Note of the Directorate for Research).

1. Profile of interested visitors to Greece - Research through the VisitGreece application

1.1. Purpose of the research

The Directorate of Research designed and implemented a wider research project on the profile of visitors to our country through the VisitGreece application. For the implementation of the research, a questionnaire was created which was completed by the user as soon as they downloaded the application (onboarding questionnaire). The questionnaire was available to users from 1/6/2021 until 4/4/2022 and has been completed by 874,434 users of the application.

The research captures the travel preferences of visitors who are going to travel to our country before their visit to Greece. This section presents the results of user responses from Australia. The total number of residents from Australia who completed the questionnaire during the above period amounts to 1,251, of which 959 are men (53.6%) and 292 are women (46.4%) (Graph 1).

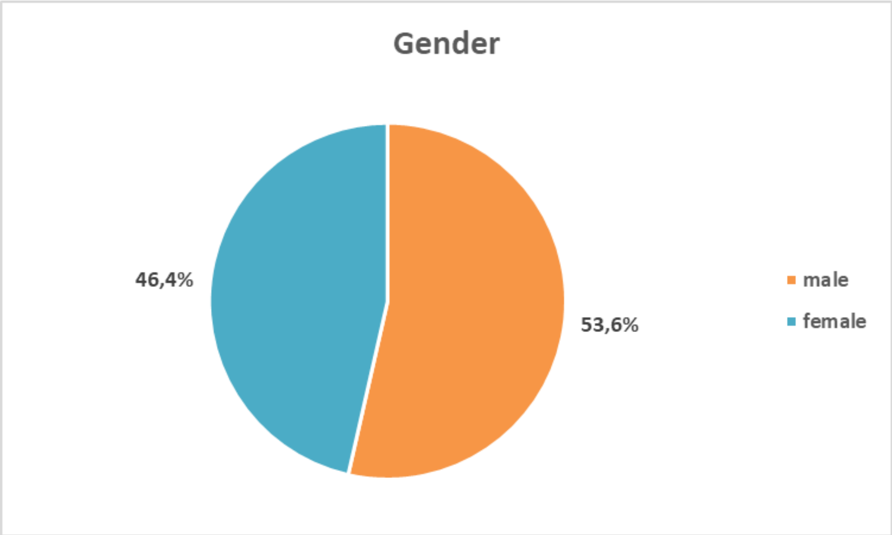

Figure 1: Australia, percentage of respondents by gender (1/6/2021 – 4/4/2022). Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application.

1.2. Repeat Visitors

76.7% of users from Australia who intend to visit Greece are traveling for the first time, while 23.3% have visited the country before (Graph 2).

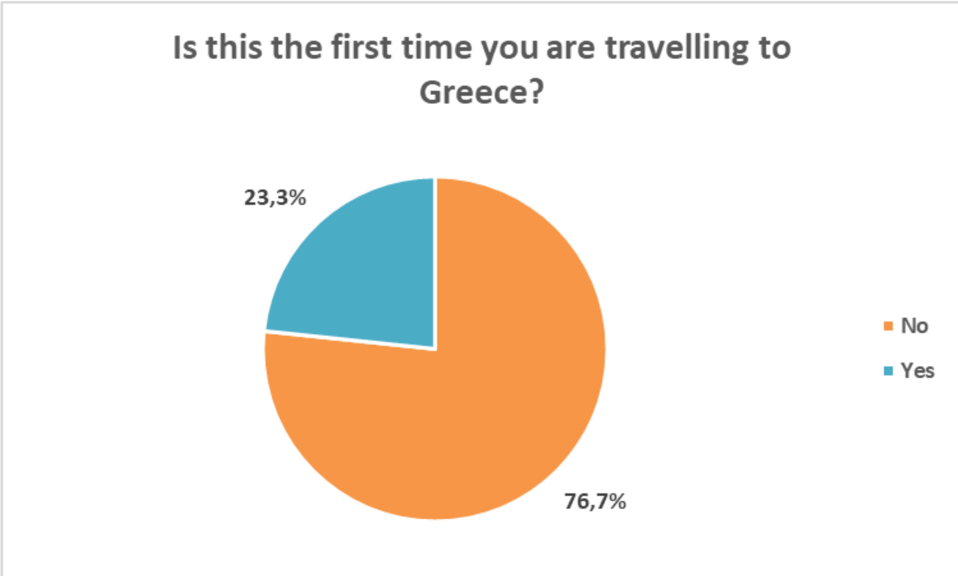

Figure 2: Australia, percentage of travelers intending to visit Greece for the first time (1/6/2021 – 4/4/2022). Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application.

1.3. Purpose of Visit

For 58.1% of the respondents, vacation is the main purpose for visiting the country, while in second place, 32.8% of respondents travel to Greece to visit friends and relatives (Graph 3).

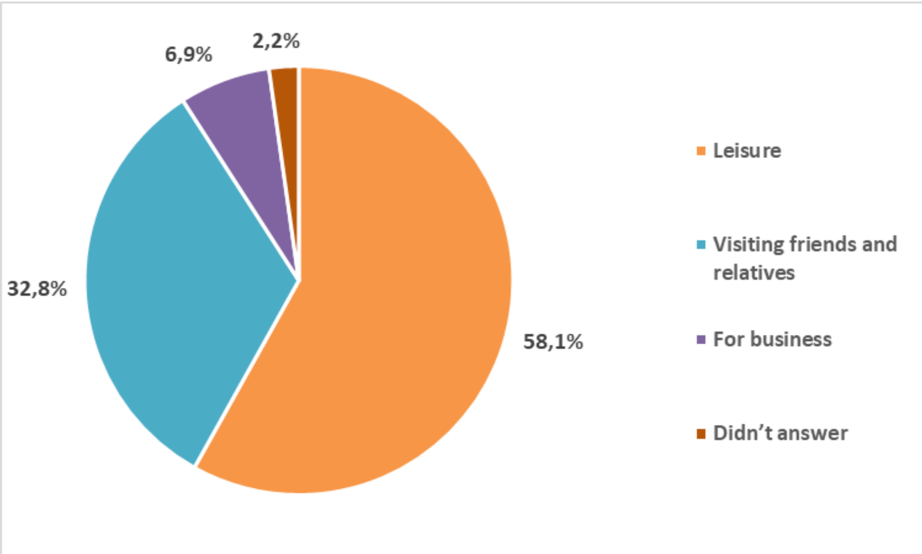

Figure 3: Australia, percentage of travelers by purpose of visit (1/6/2021 – 4/4/2022). Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application.

1.4. Who are you traveling with?

Australian travelers display diverse preferences in terms of who they choose to travel with (Graph 4):

- 33.2% of respondents stated that they intend to visit Greece alone.
- They are followed by 29.7% of respondents who intend to travel as a family
- In third place, 28.5% intend to travel as couples.

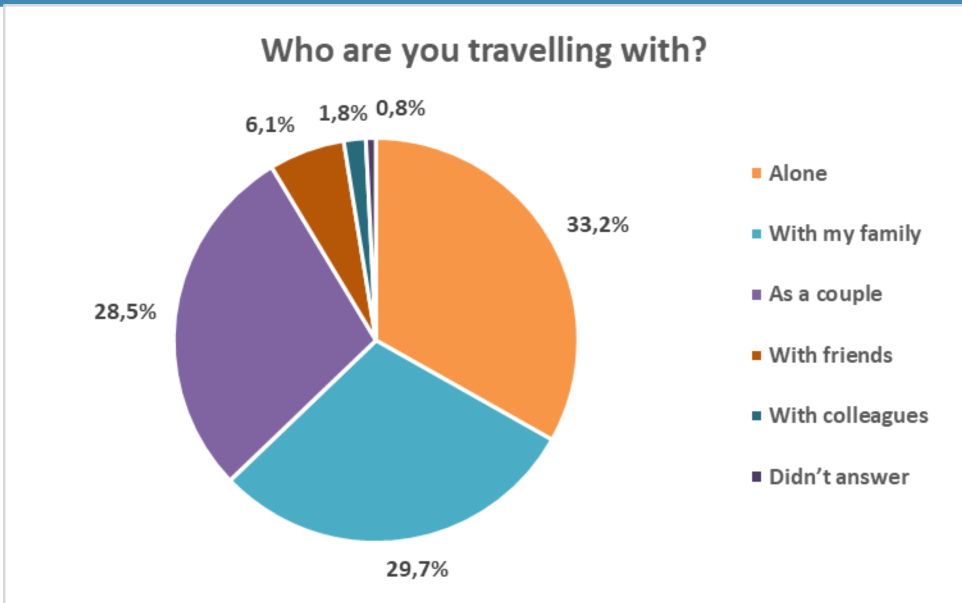

Figure 4: Australia, share of travelers by mode of travel (1/6/2021 – 4/4/2022). Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application

1.5. Activities at the Destination

Gastronomy ranks first among travelers' choices for destination activities at 42.7%. Greek culture follows at 41.2% and 30.4% of travelers are interested in nature (graph 5).

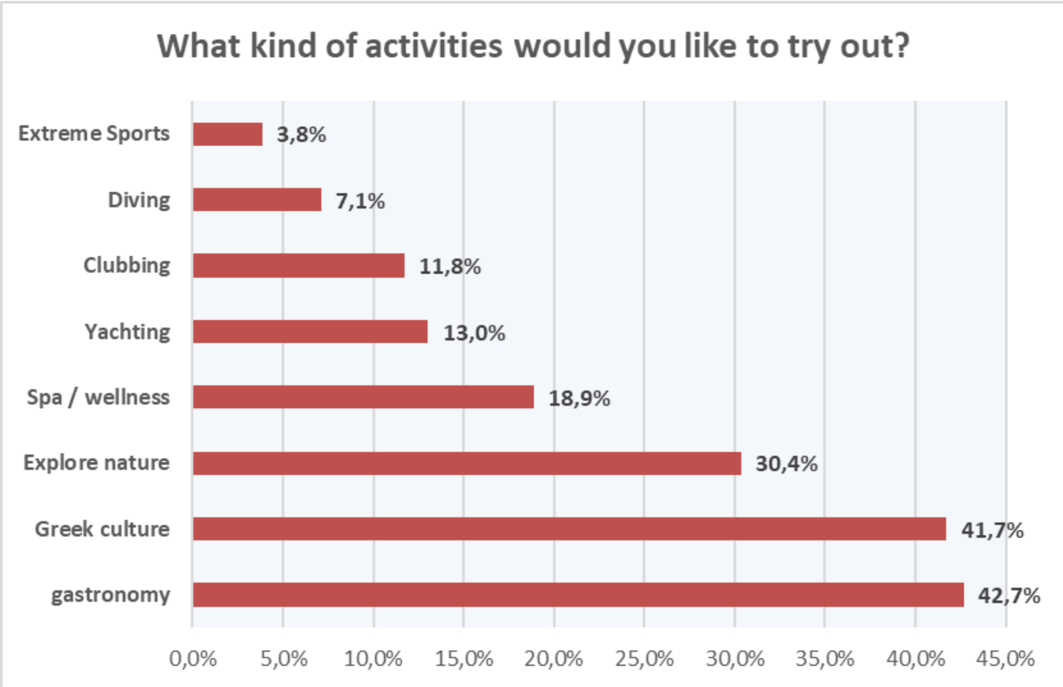

Figure 5: Australia, percentage of travelers by preferred activity (1/6/2021 – 4/4/2022). The percentages do not add up to 100% as the respondent can choose more than one answer. Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application.

11.2% of travelers exclusively choose Greek culture as the main attraction they wish to explore during their trip, with gastronomy in second place at 8.5%. In third place rank activities related to nature (2.5%) (Graph 6).

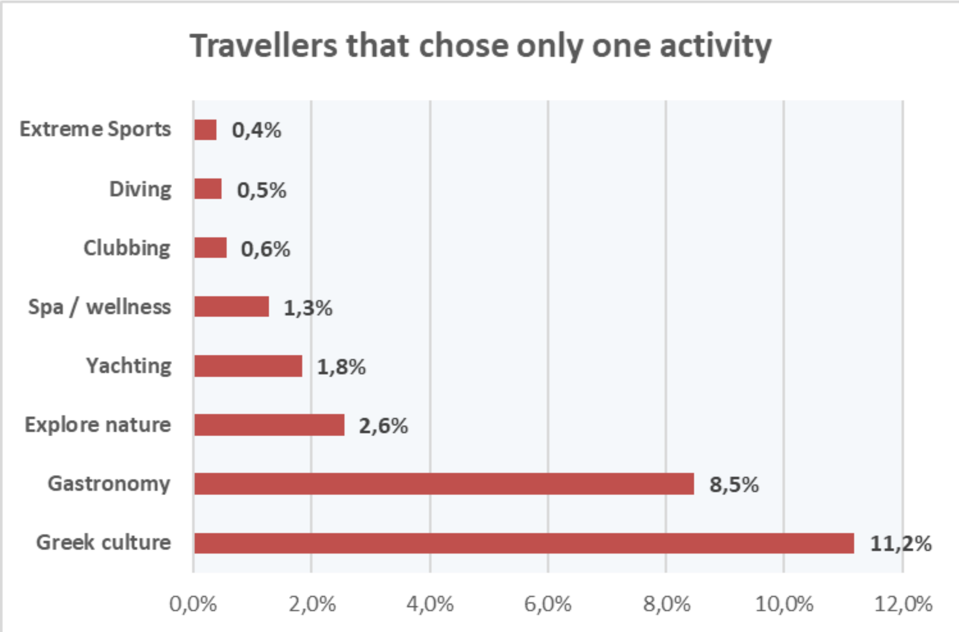

Figure 6: Australia, percentage of travelers who chose only one activity (1/6/2021 – 4/4/2022). The percentages do not add up to 100% as the respondent can choose more than one answer. Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application.

1.6. Choice of accommodation

Regarding the choice of accommodation, 30.3% of travelers choose to stay with friends and relatives, while 21.7% choose to stay in villas (Graph 7). The results reflect the large share of expatriate Greeks who are among the visitors from Australia.

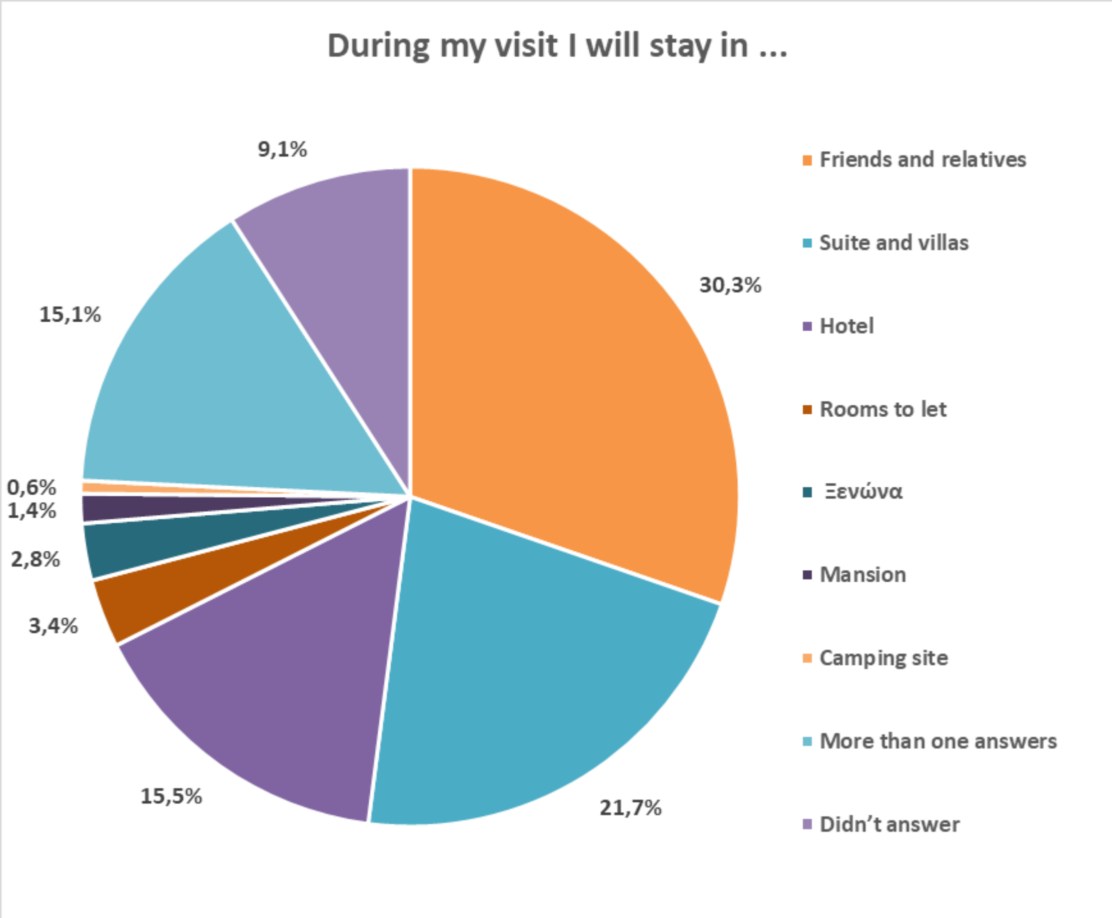

Figure 7: Australia, choice of accommodation (1/6/2021 – 4/4/2022). Source: Ministry of Tourism, Directorate of Research, Research through the VisitGreece application.

2. Qualitative primary market research of the Greek-Australian expatriate

The Directorate of Research has conducted primary research into the travel preferences of expatriates in Australia. The purpose of the research is to record the travel profile of the members of the Greek-Australian community, a market loyal to our country and for which we could further investigate its choices when traveling to Greece. This report includes the results of qualitative research accumulated through a series of online interviews with key informants and representatives of the organizations of the Greek diaspora in Australia to form a general picture of the characteristics of the Australian diaspora tourism market[1].

The results of the research are presented in the table below.

List of Key Informants to the Greek Community in Australia		
Agency/Activity	**Position in Carrier**	**Code**
Hellenic Australian Chamber of Commerce and Industry -NorthernTerritory (HACCI)	Chairman	KI01
Tourist Company	Owner	KI02
Power and Water Corporation	Senior Manager	KI03
Hellenic Australian Chamber of Commerce and Industry - Victoria (HACCI)	Communications Coordinator	KI04
Hellenic Australian Chamber of Commerce and Industry - West Australia (HACCI)	Chairman	KI05
Newspaper: The Greek Herald	Editor	KI06

Table 1: Key informants of qualitative research

[1] During the primary research it was found that it would be useful to carry out a quantitative survey for the detailed recording of their travel preferences, which the Directorate of Research is planning for the next period.

During the interviews, three main questions were asked, on which the key informants [KI] were invited to express their views:

- What are Greek-Australian expatriates looking for when they travel to Greece?
- What deterrent factors do they identify regarding making the trip to Greece?
- How could Greek-Australian expatriates become ambassadors of Greece in Australia?

At the same time, during the discussion, a clear reference was also made to more general travel behavior issues revolving around the Greek-Australian traveler.

2.1. General data (travel behavior and profile)

Due to the long distance and cost, Greek-Australian visitors **stay for a considerable period of time in the country, e.g. for one month or between six and eight weeks** [KI04, KI06]. After two years of closed borders due to the pandemic, there is a strong willingness amongst Australians in general to travel [KI04]. At the same time, it must be emphasized that there are many Greek Australians who are active in tourism and who show a special interest in the tourism development of Greece [KI04].

As for the Greek community in Australia, it is **fragmented**. Within it there are **different categories of travelers depending mainly on the age and the period in which they immigrated to the country** [KI04]. The main ones are the following:

- The first main category is **first-generation immigrants** who are now elderly and, if they are financially comfortable and in good health, visit their place of origin, where they often own country houses or other property, as regularly as possible. In several cases they spend a long time there (e.g. six weeks) while in some cases even about half a year, mainly during spring and summer [KI04]. It should, however, be noted that if a pensioner remains outside Australia for more than six months, their pension will cease to be paid. In this case reference was made to the **issue of the lack of an agreement to avoid double taxation**, which concerns many Greek Australians who own property in Greece or who do business in it. The creation of a website to provide practical information about life and the business environment in Greece oriented to the needs of the Greek diaspora in Greece could be an important tool to deal with this problem and further promote investments from Australia [KI06]. On the site, among others, it could be possible to find accountants, lawyers with a good knowledge of English.

- The second category consists of the **second generation which does not maintain such a close contact with Greece**, since it has no experiential connection with the place of origin. Their main motivation when visiting is to take a holiday and they choose popular tourist destinations such as Athens, Mykonos, Santorini, [KI04] but also the Cyclades, the Ionian Islands and Crete [KI05] and do not seem to wish to explore less popular destinations. These visitors make the trip to Greece less often, e.g. every five years [KI04]. However, even among third and fourth generation immigrants the desire to visit Greece is strong, despite their limited contact with the Greek language and culture [KI04].
- The third category is the **new immigrants**, who immigrated due to the economic crisis of recent years, whose bond with Greece is still strong and who return as often as they can to see their family (usually every two years mainly for financial reasons) [KI04]. As their first destination they choose the destination that connects them with Greece from a family point of view and thus return to their own homes and holiday homes. Therefore, they do not behave as tourists when they are in Greece but as native Greeks [KI05].

Before the pandemic there were people and families with close ties to Greece, who **traveled twice a year to Greece** and every three years and during the Christmas season [KI05]. Those who will come at Christmas are a small percentage since the majority will choose to travel during the summer [KI05].

2.2. What are Greek-Australian expatriates looking for when they travel to Greece

The tourist behavior of the Greek-Australian and the Australian tourist in many cases does not essentially show great differences with the only exception being the fact that the Greek Australians during the initial part of their trip will visit the destination that is connected to their family past [KI05].

One point that was particularly mentioned was the need to shift to **new tourism products away from the outdated Sun and Sea model, to increase the interest of the Australian public in general in Greece.** Special forms of tourism such as **extreme sports** and **mountain tourism** show significant potential among Australian travelers, which can contribute decisively to mitigating seasonality and strengthening local economies for a longer period (preserving jobs, extending the operating period of accommodation and tourist businesses), given that many choose the winter months to carry out mountain activities. Kalymnos, which now enjoys international reputation as a mountain destination, is an extremely interesting case and has great potential for further development [KI02].

At the same time, **wine tourism** could attract the interest of Australian travelers in general if a specialized campaign was carried out to promote this special form of tourism. Although efforts have been made to promote Greek wine in Australia, these have not been successful, given that Australian wine is extremely competitive in terms of price and quality, and Greek wine is becoming, due to high transport costs, a luxury product for expensive restaurants [KI04].

Due to the lifestyle of Australians (most live in cities with small backyards) it is quite common for second and third generation Greek expatriates and Australian visitors in general when visiting Greece to want to experience **the authentic rural experience and life of the farm** (visit olive groves, be close to animals etc.) [KI06] and they seek a unique and holistic experience [KI03].

At the same time, after the pandemic, the **popularity of retreats** has increased in Australia, i.e. places of tourist accommodation where one can disconnect from the outside world by leaving their mobile phone at the entrance, to be notified when needed, and where they can have a relaxing holiday nearby in the natural lifestyle (for example, diet with local and organic products, yoga) [KI06].

Many Australians are turning to Bali for **medical and dental tourism**, which shows the potential that this form of tourism has. Initiatives for medical tourism have also been launched by Greece since the country has significant comparative advantages (e.g. world-renowned doctors) but these have not been successful. An important issue raised in relation to this special form of tourism is that the tourist is often **treated in money-making terms** ("we see him as a moving dollar"). An important step for the promotion of medical tourism could be the realization of bilateral seminars with Australian doctors with the aim of raising their awareness of cross-cultural awareness issues [KI06].

In recent years, the discussion about **sustainability and the circular economy** in the context of the travel experience has intensified in the wider region of Asia and the Pacific. More and more travelers from Australia, as well as from other countries, attach great importance to reducing their environmental footprint during their trip and are willing to pay more to achieve this. Greece can take advantage of this opportunity and attract this audience. As a result, significant opportunities are opening for tourism products such as ecotourism [KI03].

2.3. Deterrent factors regarding making a trip to Greece

The main deterrent factor is the **financial** one, i.e. **the high cost of making the trip** [KI04, KI05]. It was underlined that it is possible that the economic factor will become even more intense due to the economic effects of the pandemic [KI04]. More specifically, ticket prices have increased significantly and, in several cases, have become prohibitive: while 5 years ago tickets ranged from 1200 and 1300 euros per person, now they amount to 2200 euros per person, a price increase of around 30%. Therefore, to visit our country a family of four, which is the average in Australia, needs around 8800 euros [KI06].

A major problem is the **lack of direct flights to Greece**, given that it is a journey that takes about 24 hours [KI03, KI04] and to go to Greece from Australia one must make a stopover in Singapore, Qatar or the UAE [KI03]. In the past, Qatar had direct flights to Athens but also to Thessaloniki for the summer and sometimes for Christmas, significantly reducing the travel time and making the journey easier for visitors [KI05].

Difficulties also arise due to the **difference in seasons**. In Australia **the summer school holidays coincide with the Christmas holidays**, so schools are closed from about mid-December to early February, when families can take time off and go on long trips. This creates problems for many families since the period in question does not coincide with the Greek summer [KI04]. More specifically, the school term consists of four quarters with three weeks of holidays in between. However, there are also **private schools** which in the last 3-4 years, because many Australians have roots in European countries and many parents take their children out of school during the summer, have started to **extend the July holidays to 4 weeks and reduce the December holidays by one week**. In other words, for Greek Australians with families with school-age children, despite the difference in seasons, July is a month in which it is possible to travel to Greece [KI05]. It should be noted, however, that **the duration and period of school vacations varies from state to state**. However, the creation of tourist packages for the period December-January is likely to be enthusiastically received by many families who would take the opportunity to visit the country [KI06].

Also related is the issue of the **seasonality of the Greek tourist product**, which is an important deterrent both for the realization of tourist investments in Greece and for the pursuit of **visits during the winter months** [KI02].

Greece must move away from **promoting outdated images and concepts** centered around souvlaki and beaches and return to its roots by promoting authentic Greek culture and civilization [KI03]. At the same time, the **promotion of the Greek tourist product is often limited and fragmented**, at a time when countries such as Spain, Turkey as well as S.E. Asian countries carry out aggressive campaigns to promote their own tourism product in the Australian market [KI03, KI06]. At the same time, the **competition** from destinations located a short distance from Australia, with a large availability of direct flights and much lower prices, such as Bali and Thailand [KI03], is extremely intense.

Reference was also made to the fact that no **efforts are made to attract the specialized audience of Greek-Australian expatriates** [KI02]. Emphasis should be placed on formulating an effective and targeted promotional campaign with **the feeling of homesickness at its core**. With a simple slogan like "come home" and a simple advertising concept e.g. a Greek-Australian sitting in his backyard watching a cricket match drinking his beer and saying "I am going home," could significantly strengthen expatriates' interest in our country. Special emphasis must be placed on promoting new images and landscapes of Greece: promoting images with mountains, young people driving or enjoying Greek cuisine in lesser-known locations of mainland Greece, etc. [KI02].

Issues of **difference in mentality and organizational models** are a significant obstacle to attracting tourists. A typical example is the **lack of availability in businesses of the option to pay by credit card**, at a time when Australian and Greek-Australian visitors mainly use credit cards for their transactions. At the same time, Greek businessmen should treat the Australian tourists better and understand fundamental cultural issues. Another important cultural and organizational issue is the **lack of child-friendly and breastfeeding-friendly dining and accommodation facilities** which are very common in Australia and the lack of specialist agencies nationally where a tourist can secure care services for children. The **implementation of cultural awareness seminars** in which experienced hoteliers who have a good knowledge of the mentality of Australian visitors will act as mentors [KI06] could contribute to solving these issues [KI06].

An issue that concerned visitors even before the outbreak of the pandemic but which has become even more pressing is the fear that if they have to receive some kind of medical care, they will not receive from the hospital in which they will be **medical services of a level equivalent to that of Australia** and the nursing staff will not be able to **communicate with them in the English language** [KI06]. It is important to point out that the trip to Greece for the Greek expatriate is of long duration and therefore it is reasonable that health issues are an important priority as the stay in a country with a different health system is extended.

The pandemic has also brought to the fore a series of **new issues** that concern travel agents such as the development of suitable **travel insurance products** (e.g. assurance in the event of a sudden lockdown) [KI04].

2.4. How Greek-Australian expatriates can become ambassadors of the Greek tourism in Australia

Greek Australians **already function to a large extent as ambassadors of Greece through their daily contacts with Australians**. At every opportunity they try to promote Greece as a tourist destination to their Australian acquaintances and friends and encourage them to visit the country and highlight its comparative advantages against major competitors such as Spain and Turkey [KI02, KI05].

The use of a marketing tool such as the **Ambassadors of Greek tourism** can be an excellent opportunity to further promote Greece and it is undeniable that numerous proud Greek Australians would like to participate in efforts to promote Greek tourism [KI02, KI01]. **Greek expatriates** who excel in Australia such as **distinguished tennis players** Nick

Kyrgios and Thanassis Kokkinakis, and who are particularly proud of their Greek heritage could successfully fulfill the role of Ambassador [KI03]. It is important to utilize both print media (for the older Greeks in Australia) and electronic media (for the younger, second and third generation Greek Australians) [KI06].

Emphasis must be placed on the use of **Greek-Australian social media and groups**, which provide a lot of information about Greece with the aim of increasing the likes and shares of the Ministry's posts and further promoting its actions [KI05]. Emphasis must also be placed on the use of influencers (young people with fresh faces and mood) who are able to promote lesser-known destinations and products (Mrs. Nitsa's olive grove, grandfather Kostas' honey). Importance should be given to the utilization of **blogger mothers** since mothers exert the greatest influence within the family [KI06].

Finally, it was pointed out that the Greek-Australian media in order to promote Greece should be **given some substantial incentive**, e.g. packages from the Greek National Tourism Organization (GNTO) but also funding (funds) [KI06].