Segmenting and targeting European package travellers

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Abstract

This article analyses the profile of the two fundamental foreign traveller market segments. Specifically, German and British visitors of tourism destinations of Northern Greece are analysed. The analysis results contribute toward a better understanding of the preferences and behaviour of these two market segments. In addition, based on the results of the study, the development of a special database at an international level regarding information on the preferences and behaviour of the two groups is also possible.
Keywords: market segments, German and British visitors, targeting, destination management.

1 Introduction

Specifically, the study researches the perceptions that agents of imported tourism hold about their customers whose destination is the prefecture of Chalkidiki. A cluster analysis of German and British tourists who reach Northern Greece destinations by charter Flights, is also conducted. The profile of German and British visitors of Chalkidiki who prefer high quality lodging is finally studied.

1.1 Research objectives

More specifically, the purpose of this paper is to propose a systematic boundary of strategic segmentation and targeting actions that helps a marketing researcher and a tourism planner to position the total product offers of the specific tourist destination in profitable German and UK market segments.

2 Customer analysis of the German and UK travellers

In order to investigate whether observed customer characteristics are related with the development of profitable sustainable strategies for the specific destination area, it is necessary to review some related customer profile description studies and data regarding demand characteristics. The definition and description of market (consumer) characteristics is the basis for the identification of target markets and the development of positioning strategies [11, 19, 26].

Many countries develop strategies targeting the same markets of consumers - tourists. Mediterranean countries target primarily the German and the UK market segments [12, 24, 25]. According to Eurostat data, overnight and arrival proportions of German and UK travellers to countries such as Italy, France and Portugal, range from 30% to 50%. The corresponding proportion for Spain is around 60%, and for Greece, arrivals proportion ranges between 35%-40%. For Northern Greece destinations in particular, the overnights proportion is about 70%.

Syriopoulos and Sinclair [31] using the AIDS model (a consumer expenditure model) concluded that: "major tourism-generating countries exhibit different preferences in their demand for tourism in the Mediterranean". Specifically, they found that the most expenditure elastic demand for tourism is related with tourists from Sweden and France. German and UK travellers exhibited the lowest expenditure elasticity for Mediterranean destinations. In particular, the Germans' elasticity values seem to be higher for the following destinations: Turkey, Greece, Italy and Portugal. By contrast with the above countries, German travellers have the lowest elasticity value for Spain (as their selected destination). The UK traveller's elasticity values seem to be higher for Turkey, Portugal and Greece. Spain and Italy are associated with the lowest elasticity values for UK travellers. Syriopoulos and Sinclair [31] also note that ".. price increases in Greece have large negative effects on demand from the UK, West Germany and Sweden. Pairs of destinations which were substitutes for most origins were Greece and Spain, Greece and Portugal, Spain and Portugal, and Italy and Turkey". In segmentation studies the income and expenditures are two basic explanatory variables, but in the '90s the competitiveness and sustainability of destinations also requires more quality tourism tactics in order to attract different nationalities or different consumer targets.

According to Aquilo [4], the integral Development Plan for Tourism in Andalucia, aims to provide quality through destination user satisfaction guarantees rather than providing products for very limited groups from a high-income bracket (i.e., quality tourism is not tourism for millionaires).

It should be noted that targeting tactics help tourism service providers to be more effective in satisfying customer needs [8, 21, 35]. Carey et al. [6] note that countries like Greece, Spain, Turkey "sell" the 3's (sea-sun- sand) which are considered complex commodities, with a virtually substitute core tourist product. That kind of destinations gradually become more of a mass tourism industry standardized product. The "majority of the consumer of such destinations organizes their travel through the tour operator. However, tour operators are also

dependent on customer needs because the customers decide where to go". Customer-oriented tactics can help the destination (tourism) product supplier to create a better long-term relationship with tour operators and therefore to retain their customers. Also foreign mass tour operators (up to 80% of holiday activity is organized by tour operators) can help the destinations to offer total products of satisfactory quality with the sole aim of satisfying the tourist [6].

Bakkal [5] identifies eleven studies that have analyzed the demand characteristics of international tourism. Another research paper also analyses the determinants of individual choice among destinations and vacation activities of 5283 German tourists [13]. Of the above respondents, 15% had spent more than one spell of leisure-related vacation in 1985. More specifically, Table 1 presents the basic determinants of individual German behavior for six subsegments. In addition, the same study reports the following:

•German tourists adjust the level of consumption to the regional price level instead of choosing inexpensive vacation resorts,

•the sunnier the climate at a destination, the larger the frequency of visitors who choose the destination ,

•the less sites are plagued by ecological problems, the higher the frequency of visitors who choose 'untouched' nature destinations, and

•first-time visitors frequent more newly developed vacation areas (such as Portugal) yet they also visit destinations favored by the very young.

Smeral [27] identified important eurostyles of British and German visitors of Austria. The classification of the visitors into winter and spring visitors constitutes a useful basis for profile comparison of visitors of other destinations during winter. During winter, mainly German employees and pensioners visit Austria. They usually complain about the high cost of living and the rainy weather. Visitors collect information about Austrian destinations personally (48.5%), from relatives (27.8%) and from promotional leaflets (15.8%). Their basic motives include: landscape, common language, cultural sites, comfort and sports. Their activities are usually sleep, excursions and shopping. They mainly arrive to Austria by car (74.8%) and bus (13.8%). As far as British winter visitors of Austria are concerned, they are classified mainly into the category of "experience seekers" who are more than 40 years old, and the category of "culture seekers" who are about 39 years old. Their favourite activities are shopping and good weather for touring. The "culture seekers" avoid sports activities.

3 Methodology

The methodology makes use of three field studies. In the first and second study, German and UK traveler responses are studied. This selection was made on the basis that these two categories of travelers are the most traditional "heavy - users" of the destination (GNTO, arrivals and expenditures data 1960-2001).

Table 1:   German segments: The determinants of individual behavior of German tourists.

SEGMENTS:				
The young German	The retired persons	The low schooling- little income Germans	The German parents	The urbanised and non-urbanised German residents
Less inclined to spend a vacation in 1985	Larger incomes; more inclined to travel and to spend on more expensive vacations	They prove to have reduced the respondents willingness to travel	Less inclined to travel	Urbanized Germans favored relaxing vacations at a small distance from home-preferably at vacation resorts with German tourists and a good knowledge of the German language
Have chosen more cost-intensive vacation activities at more distant destinations with typically warm and sunny climates		Have increased their willingness to spend relaxing or relatively inactive vacations	Prefer to travel with children; to spend vacations either with relatives or spend inactive vacations at traditional resorts within a small distance from home (preferably at beaches)	Non-urbanized Germans seem to be willing to travel and incur high vacation expenditure
Larger incomes; evidently increased the shadow price of time and thus reduced willingness of young persons to spend a vacation		Have reduced their willingness to visit destinations where German is neither spoken nor easily understood		
Spend a vacation at a place different from home; choose more expensive vacation activities and are more willing to accept higher travel cost.				
Source: SFB 178 Internationalisation of the Economy -University of Kostanz [29], Eymann and Ronning [13].				

These two foreign segments also reflect the largest proportion of the total arrivals in Greece [12]. The sun-lust German and UK package tourists seem to

be the basic customers of the Northern Greece lodgings and especially of the summer resort Chalkidiki (GNTO data). Even in crisis periods, like the Golf War and the Yugoslavian Crisis [12], the two segments showed an increasing trend in their arrival-proportion with charter flights in the Macedonia Airport of Thessaloniki.

In the first study, the data were obtained from the field research database of the University of Macedonia, "Macedonia Airport (low season study) - Profiling German and UK package travelers". After a Cluster Analysis on 4105 German - UK respondents and the specification of the segments, the study focused the analysis to the offering factors that determine a high level of tourist satisfaction. To analyze the relations, unsaturated logit models were created. These simplified models show the relationship between each of the independent variables and the dependent variable (i.e., tourist satisfaction). At this level of analysis, the relationship between travelers' motivation and tourist satisfaction is also obtained.

At the next step, the second study analyses the perceptions of 236 quality lodging tourists about the total product that has been offered. To analyze the perceptions, frequency tables with the respondents - customers profile and weaknesses of the destination are presented. Finally, the perceptions of the six local organizers are analyzed, using the same technique. Furthermore, some main factors for the development of sustainable strategic actions which are related to the German and UK package travelers are extracted.

The questionnaire was designed to investigate in greater depth, the motivation and customer satisfaction determining factors. A total of 4105 German and UK charter flight travelers responded to all questions. This database was the foundation for the clustering-segmentation study. The sample was representative of the tourist population that had Northern Greece as their final destination.

4   Analysis and results of the field studies

The cluster analysis provided 10 clusters (Table 2). The average behavior of the travelers for each of the ten clusters was not the same with the respective ANOVA results for the descriptive variables. The respondents profiles, based on the cluster analysis, are presented in Table 3.

The segments of Northern Greece i.e., low season and charter flight German and UK travelers, differ among them in age and travel motivations. There are several "older" segments, namely, (Germans): 5, 1,3,2,7 and (UK): 3, 5, 4, 6. The young segments are 8 (Germans), 10,1,9 (UK). Sea, sun and sand seekers are all in the German segments, and the 3s are especially important for the high population segments 9 (90%) and 2 (82%). Lowest importance is assigned by German segments 1, 8, and 3. All UK segments consider 3s highly important, especially segment 7 (84%). Touring seekers are concentrated in German segment 8 and UK segments 4 and 6. Sports seekers belong primarily to German segments 8 and 10, and UK segment 6. Religion-culture seekers can be located mostly at German segment 1. Agricultural seekers are mostly concentrated in German segment 8, and the UK segments 4 and 6. Finally, education-culture

seekers frequent German segments 4 and 1, and UK segment 4. Winter and health travel seekers are not an active German or UK low season traveler category for Northern Greece.

Table 2: Cluster analysis results.

Cluster	Number of Cases	%
1	89	2,17
2	599	14,6
3	50	1,22
4	223	5,43
5	139	3,39
6	35	0,85
7	2003	48,8
8	154	3,75
9	688	16,8
10	125	3,04
Total cases	4105	100

Table 3: Respondents profile.

Segments	German	UK travelers
1 (2,17%)	Mixed - age group. Young and older, students, clerks and pensioners. Part of a travel group. Basic destination attractiveness: educational vacation and religion vacation experiences.	
2 (14,6%)	Mostly middle-aged travelers and older. Clerk, pensioners, workers, and administrative personnel. Many of them (22%) visited N.G. for the second time. Pairs or pairs of friends, relatives. Important destination attractions: sea, sun and sand, educational and touring objectives. Top destinations are: the east beach sites of Chalkidiki.	Mostly middle-aged travelers and older. Clerk, pensioners, workers, and administrative personnel. Many of them (22%) visited N.G. for the second time. Pairs or pairs of friends, relatives. Important destination attractions: sea, sun and sand, educational and touring objectives.
3 (under 1,22%)	Older and middle-aged travelers, clerks, administrative personnel. Arrivals in N.G. with relatives and friends. Sea, sun and sand are not their very important destination attractions.	Older and middle-aged travelers, clerks, administrative personnel. Arrivals in N.G. with relatives and friends. Sea, sun and sand are not their very important destination attractions.
4 (under 5,43%)	Older, pensioners, not singles, clerks, administrative personnel and workers. Arrivals with over two more older people. Basic destination attractions: sea site vacation and educational vacation experiences.	Older, pensioners, not singles, clerks, administrative personnel and workers. Arrivals with over two more older people. Basic destination attractions: sea site vacation and educational vacation experiences.

5 (under 3,39%)	Middle - aged and older, pensioners, clerks, workers. Arrivals with over two more older people of the family.	Middle - aged and older, pensioners, clerks, workers. Arrivals with over two more older people of the family.
6 (0,85%)		Older, pensioners, and some learned professional men and housekeepers. They come in N.G. with others. They visit friends and relatives. Basic destination attractions: sea site vacations, touring, agricultural, religion and sports vacation experiences.
7 (48,8%)	Middle-aged travelers and older, clerks, administrative personnel and workers. Arrivals with relatives and friends. Important destination attractions: sea, sun and sand touring and educational travel objectives. Top destination areas are the west beach sites of Chalkidiki.	Middle-aged travelers and older, clerks, administrative personnel and workers. Arrivals in N.G. with relatives and friends. Important destination attractions: sea, sun and sand touring and educational travel objectives.
8 (3,73%)	Young or middle-aged visitors, clerks, administration personnel and workers. Most of them are traveling alone. Several of them have come more than once in N.G. Basic destination attractions: the sea site vacations, touring, sport and agricultural vacation experiences.	
9 (16,8%)	Young people, mainly less than 29 years old, clerks, workers and administration personnel with friends, relatives and other older people. Basic destination attractions: mainly the sea site-sunny vacations, and educational, touring vacation experiences in all Chalkidiki destinations.	
10 (3,04%)	Young people, mainly less than 29 years old, clerks and students with friends and relatives. Basic destination attractions: the sea site vacations, and sports vacation experiences.	

The factors which influence visitor satisfaction were identified with the use of unsaturated logit models. These models indicate the degree to which the independent variables (i.e., the 21 offering variables of the destination) affect the dependent variable, i.e., the customer satisfaction variable (Agresti [1,2]). The basic results from the Pearsons $X^2_{0,10}$ statistic for independence logit models ($\ln (F_{11}/F_{12})=2x\lambda_{11}$) are reported in Table 4.

Table 4: Results of X^2 statistic for independence logit models.

Variables of unsaturated logit models Traveler Satisfaction (TS) with offer and motivation variables ln $(F_{11}/F_{12})=2 \lambda^{\text{satisfied visitors}}$	
TS with ...	X^2, df, p
Environment and landscape	344, 4, 0.000
Climate and weather	311, 4, 0.000
Image and beauty of place	333, 4, 0.000
Quietness at the place of stay	214, 4, 0.000
Transportation conditions	179, 4, 0.000
Design inside the place of staying and staying conditions	358, 4, 0.000
Service inside and outside of the staying place	335, 4, 0.000
Food quality	472, 4, 0.000
People familiarity, hospitality	588, 4, 0.000
Cultural offers	238, 4, 0.000
Getting information at the local travel agencies or information offices	209, 4, 0.000
More benefits from the whole tourist offer in Northern Greece	231, 4, 0.000
Sports and hobby offers	142, 4, 1 *
Quality of athletic establishments	91, 4, 7 *
Streets for walking and touring	132, 4, 2 *
Entertainment possibilities	303, 4, 0.000
Shops timetable	101, 4, 6 *
Tidiness/ cleanliness in the environment	111, 4, 5 *
Origin	44, 2, 2 *
Religious reasons/ Pilgrimage	0, 1, 1.000
Quality of service	4, 1, 0.046

The offering factors which determine German and UK visitors' satisfaction, are the following (listed in order of importance):
1. People familiarity, hospitality
2. Food quality
3. Design in the place of staying and staying conditions
4. Environment and landscape
5. Service inside and outside the staying place
6. Image and beauty of place
7. Climate and weather
8. Entertainment possibilities
9. Cultural offers
10. More benefits from the whole tourist offer in Northern Greece
11. Quietness at the place of stay
12. Getting information at the local travel agencies or information offices
13. Transportation conditions
14. Motivation factor: Quality of service
The analysis of the second field study data showed positive relationship between traveler satisfaction and service quality. Table 5 reports the results of the field study of 236 German and UK travelers, who were interviewed in seven high quality lodgings (4 and 5 star hotels) in tourism destinations of Chalkidiki.

Table 5: German and UK Travelers: Profile Characteristics and Negative Responses to Offering Factors (tourism destinations at Chalkidiki).

1. Profile characteristics of low season German and UK lodging travelers	Frequency results (%) of the sample
Demographics:	
50-64	37,7
30-49	33,5
19-29	15,3
over 65	13,1
Clerks	38,1
Pensioners	19,5
Workers	16,9
Married	76,3
Unmarried	13,6
Had children	69,9
Had children over 20 years old	46,6
Had children between 13-29 years old	11,9
Behavior:	
Select double rooms	85,6
Had travel with charter flights	65,7
Had travel with regular flights	32,6
Had organized the trip in a travel office	91,5
Had organized the trip individually	6,8

2. Negative customer answers: offering factors for 4 and 5 star hotels (15% and over)	
4&5 star hotels:	
Expensive drinks at the bars	40
Music, TV, video in the room	35
Furniture in the room	35
Means of transportation	22
Umbrellas at the beach	21
Bar in the room	19
Shopping center	17
Cinema room	15
Night club	15
3. Negative customer answers: offering factors for Destinations (15% and over)	
Destinations:	
Theatrical performances	23
Classic antique Greek art	23
Clean and organized beaches	20
Information tables	20
Private helicopter- airport	19
Rent a ship	19
Library with classic antique Greek writers	18
Noise	18
Accessibility	18
Disco clubs, bars	18
Cultural shows	16
Entertainment in Greek traditional taverns with Greek dances	16
Rent a private airplane or helicopter	16
Shops with traditional Greek handwork's	15
Greek kitchen	15
European kitchen	15
Travel programs with monuments and activity variety	15
Ecosystem, lake and water area travels	15
Rent sports equipment	15
Well knowing of destinations local area	15
Cleanliness of the roads	45
Cleanliness of the towns and villages	41
Cleanliness of arrival and departure gates	32
Cleanliness at the beach	30
Aesthetics at arrival and departure gates	29
Architectural - cultural aesthetics at towns, villages	28

Notes: n=236>30, N=1166 Germans and UK 4 & 5 star hotels travelers, Z^2=1,96 with significance level α=0,05 and rate π=0,5 the sample error is e=~5,7 (for significance level 0,05) sample error is between 5% and 6%.

Finally, another study investigated the major local tour organizers' opinion about and perceptions of the tourism offers of Northern Greece, as well as the typical foreign travelers to Northern Greece destinations. Table 6 presents the highlights of that study's results.

Table 6: Local tour organisers' opinion and perceptions regarding foreign travelers to N. Greece and negative offering factors.

Foreign travelers to N. Greece are... income: At most middle income travelers (83%); sometimes high income travelers (33%) heavy users: Heavy users (50%); not heavy users (33%) of the destinations return (come back): They return because of low cost (66%) and Tradition-Greek culture and friendly people (50%)		
The negative factors are...		
100% negative perception	80% negative perception	60% negative perception
The quality of sports establishments Conference facilities	Facilities in and out of the lodgings Health and spa resorts Facilities for horse riding and bird watching Facilities in the staying places for children Transportation conditions Situation in the Airport and related services	Aesthetics at the visitor places Quality of the food in and out of the staying places Friendly local people Infrastructure for sport and hobby activities Value and benefit relations Cleanliness of the environment Quietness at the staying places

5   Major findings and discussion

Three points analysis (see final conclusion in tables 4 and 6), has shown that the factors which are directly related to the achieved level of satisfaction among the English and German visitors, are:
• Environment and landscape
• Image and beauty of place
• Quietness at the place of stay

The aforementioned factors are approached in a higher level of analysis in table 4. Furthermore, these factors seem to be negatively grade by the English and German visitors, who select lodgings of an upper category. The same point of view seems to be prevalent among the 4 local tour operators. Those factors where negatively evaluated by the 60% of the local tour operators..

Based on the above, the viewpoints of the selected local tour operators and the English and German visitors coincide. The relationship between the degree of satisfaction gained by the visitors and the 3 factors lying on the supply side (that is environment, landscape, image and beauty, and quietness of the place) seems to be confirmed, not only as a result of the analysis of the negative perspectives of the tour agents, but also based on the analysis of the German and English visitors who have chosen to stay in a lodge of higher category

6   Conclusions and recommendations

The above results focus mainly on the basic offering factors. The analysis of those factors can give to the Supplier a better chance to provide strategically clear customer satisfaction tactics. As implied above, the design of the second field study drew on two main results of the first study. The analysis of quality of service and 13 offering factors in basic travel destinations of Chalkidiki can help the community strategic planners to build a sustainable customer oriented tourism industry.

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