

# THE Pair FUME OF THE ATHENIAN SPRING

18<sup>™</sup> AIRLINE MARKETING WORKSHOP



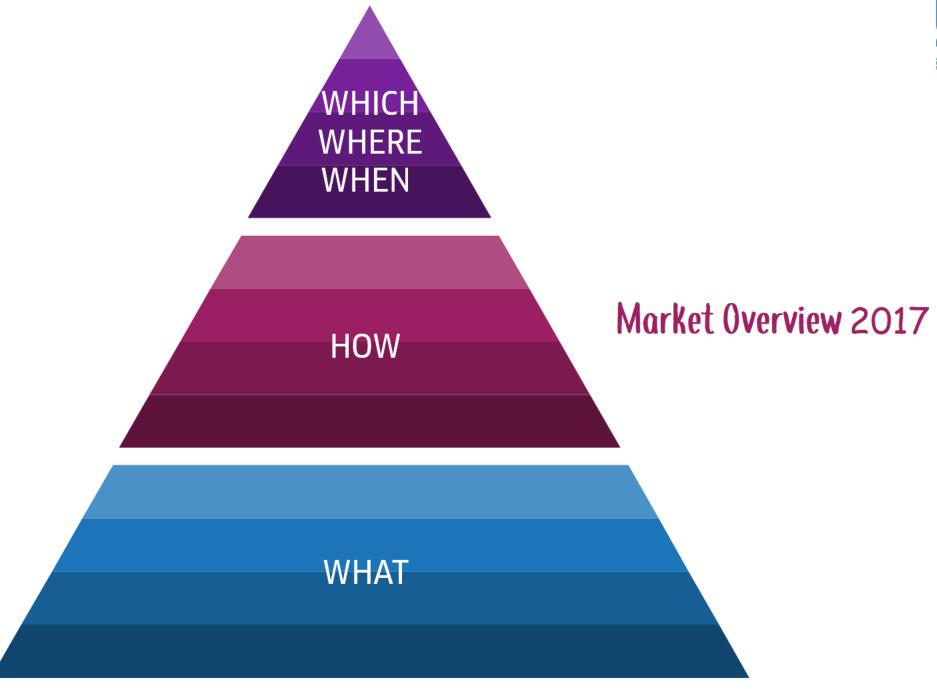
TOP CHORD

> MIDDLE CHORD

Market Overview 2017

BASE CHORD









DISRUPTION/ INNOVATION
CUSTOMER UNDERSTANDING / RISK-SHARING
STRATEGIC THINKING
STATE-OF-THE-ART SERVICES





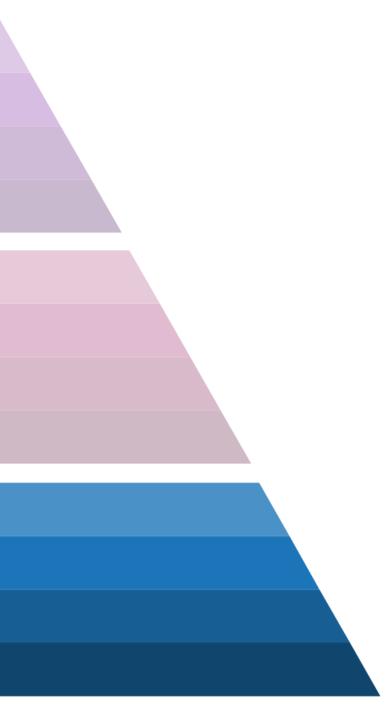
#### STATE-OF-THE-ART SERVICES

Success in the services sector doesn't necessarily come from breakthrough innovation; it comes from flawless implementation of standards and continuous operational enhancements.

A great strategy alone or visionary innovation alone won't win you the battle or the game or the competition.







STRATEGIC THINKING





### STRATEGIC THINKING

Strategy in business is like chess. It's all about the pattern.

You play the opening game as an academic.

The middle game as a magician.

The end game as a warrior.











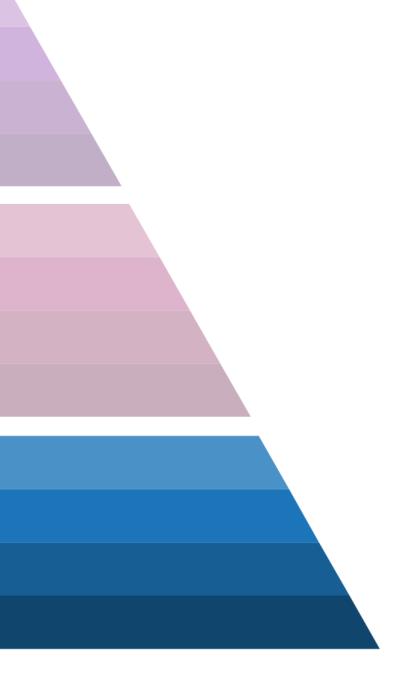
### CUSTOMER UNDERSTANDING / RISK-SHARING

Marketing without data is like driving with eyes closed. Customers don't care how much you know, until they know how much you care.





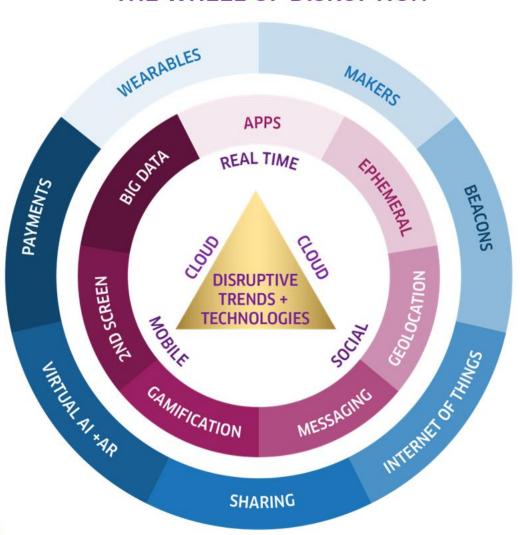
## **DISRUPTION/ INNOVATION**





#### **DISRUPTION/ INNOVATION**

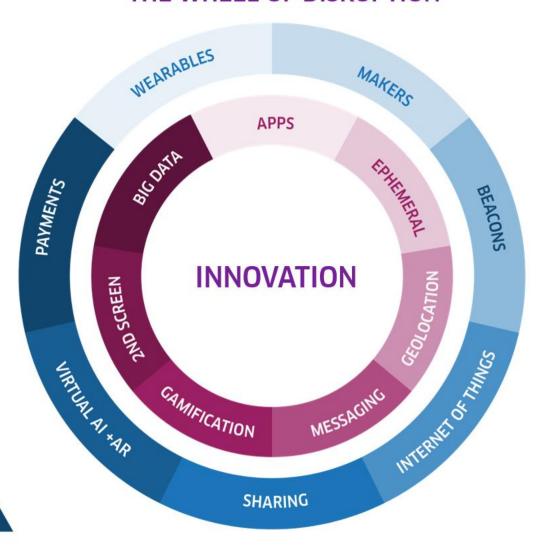
### THE WHEEL OF DISRUPTION





#### DISRUPTION/ INNOVATION

### THE WHEEL OF DISRUPTION



Disruptors don't have to discover something new; they have to discover innovative and practical ways of using new discoveries in their sector





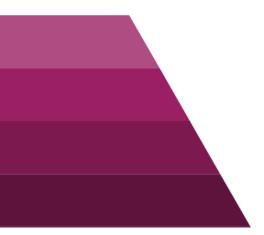
MIDDLE CHORD

BASE CHORD





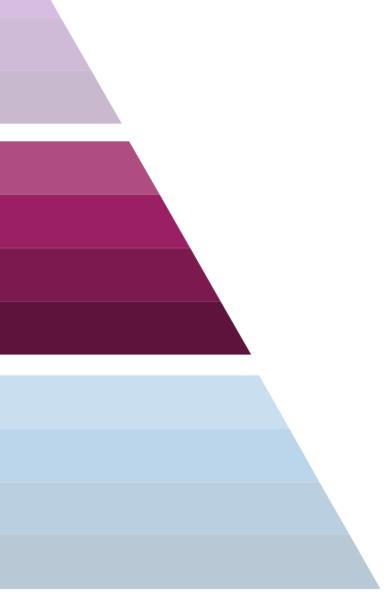


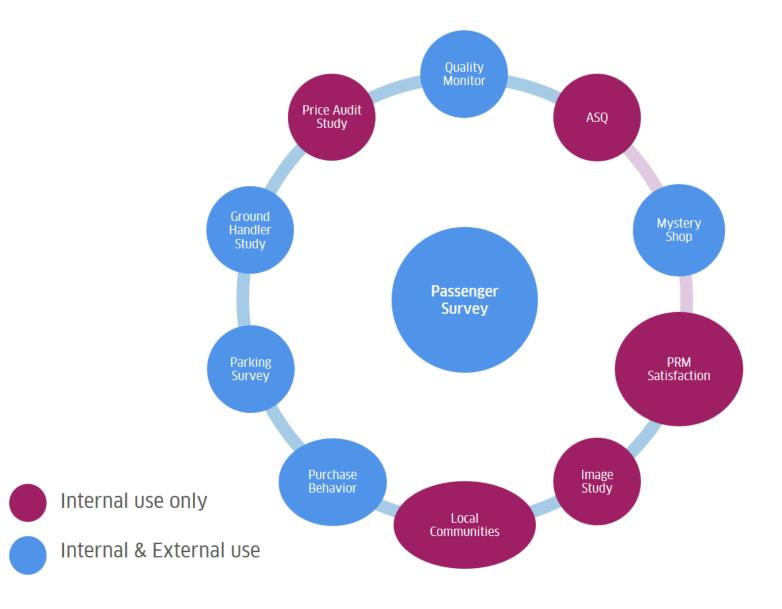


### MARKET RESEARCH

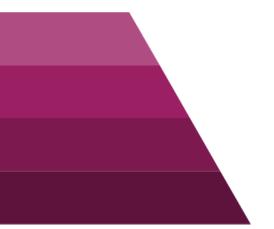
# A modular approach MARKET RESEARCH











### STATISTICAL ANALYSIS

### Turning Information into Intelligence

STATISTICAL ANALYSIS



Demographic & travelling profile

Airport, Airlines' & other external partners

Define target groups

Route development information/ Pax travelling pattern

**Airlines** 

Support new routes & additional frequencies

**Tourism information** 

Ministry of Tourism other tourism institutions

Estimation of tourists & investigation of characteristics

Purchasing behaviour & needs

Airport & external partners

Optimise airport's commercial product

Performance indicators

Airport & concessionaires

Ensure high level of passenger satisfaction









#### **Market Assessment**

Quantifying the true size of the existing air travel market on an O&D basis

**ASD Strategy** 

**Detailed route analysis** 

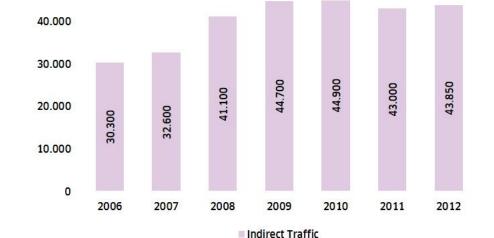
**Business case** 

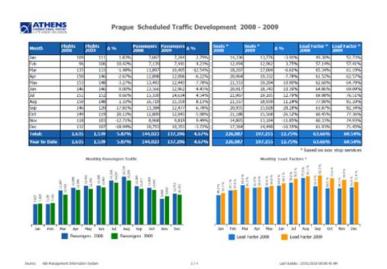
Contacts schedule / presenting the information to airlines

Evaluate and Negotiate Airline Incentives & Marketing Support...









#### Route Forecast Study

Albert - California Veninter to Tunis with Tunings on ETC 600 C benjumber per week)

#### CURRENT MARKET SUBMARY

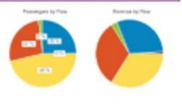
#### - CVERVIEW

- Tris note is currents served by Tenis Air
- They operated 8th annual frequencies in 1819.
- Years in artist exabitive passenger market of \$225 passengers, north 1.00m (100" in 2012)
- APE of the acestable pursuinger-market are country sounday between the origin and directions.
- . IFA of this are numeric transfing indirectly, visual intermediate algorit
- Behind spreadors acoust for T's of the total connecting market.
- Beyond connections scooler for the largest share of the connecting market with 10% of the test connecting market.
- There are currently no beyond conventing points for this main.

#### PASSENGERS & REVENUE BY FLOW



#### PASSENGERS A REVENUE SUMMARY INCUMBENT AIRLINE INFORMATION



Take All specifies in preud frequencies.

- Tension of the analysis

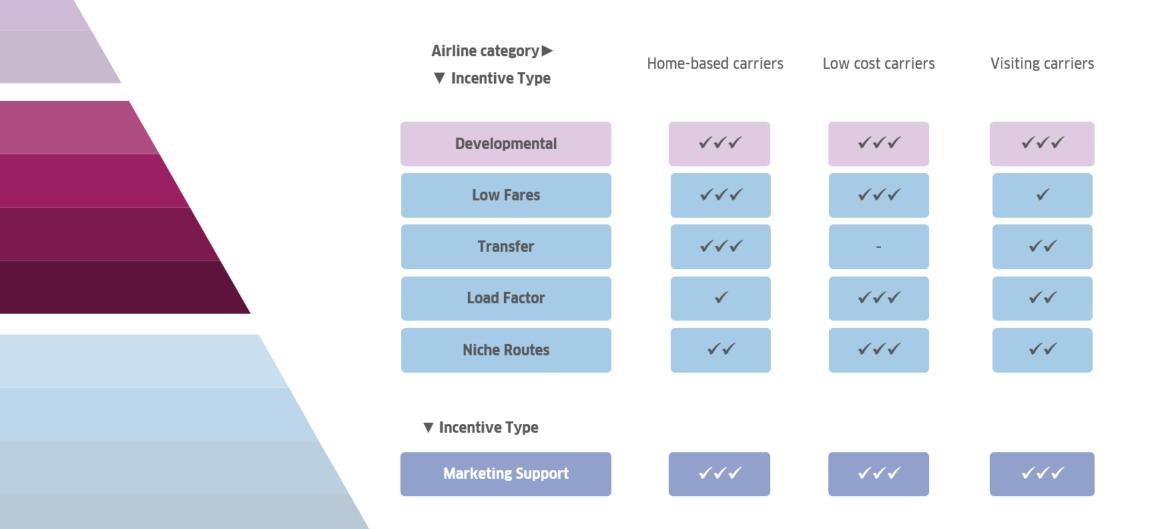
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\$10% RDC Acadian ecologic red

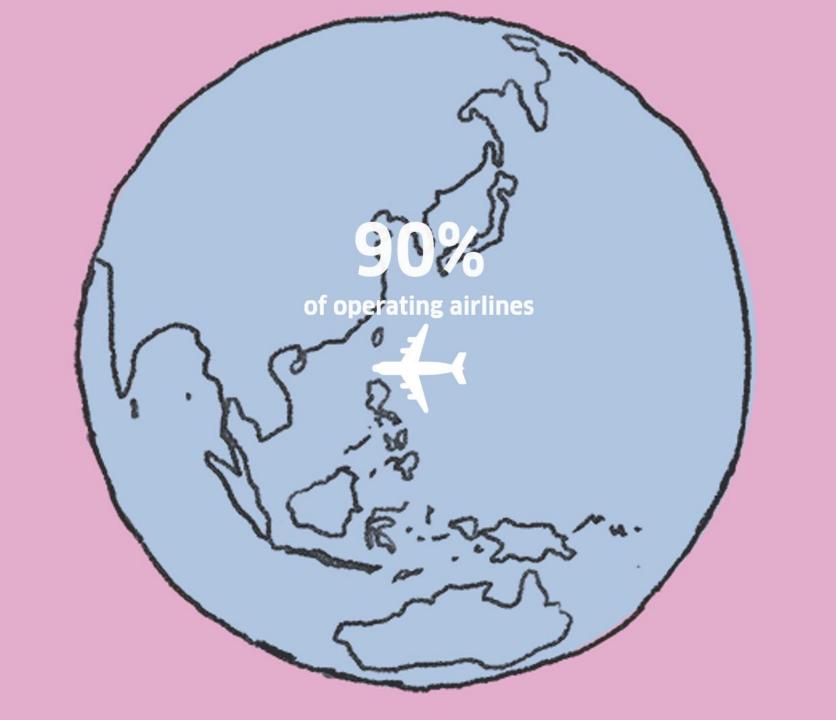
## **Incentives & Marketing Support**

ATHENS INTERNATIONAL ARPORT ELEPTHERIOS VENZELOS

**INNOVATIVE TOOLS & TECHNIQUES I** 







# the ASD process & the igate INNOVATIVE TOOLS & TECHNIQUES I





**URL**: www.aia.gr/igate

## Destination marketing: a holistic approach extending from communication to institutional structures

**INNOVATIVE TOOLS & TECHNIQUES II** 

### **Communication tools**







Institutional Structure



Destination **Athens** 

**Product** 



**Special Projects** 



**Strategic Synergies &** Cooperations



## Destination marketing: a holistic approach extending from communication to institutional structures



**INNOVATIVE TOOLS & TECHNIQUES II** 

### **Communication tools**



### Product





**Other Airports** 







### **Targeted Campaigns**



### **Special Projects**





## Integrated Marketing Strategy

**INNOVATIVE TOOLS & TECHNIQUES III** 





## **AIA WEBSITE**

### ATHENS NUTRATIONAL ARPORT

### **INNOVATIVE TOOLS & TECHNIQUES III**













# AIA WEBSITE INNOVATIVE TOOLS & TECHNIQUES III



### Average traffic per month:

500.000 users per month, almost half of them visiting via mobile.

### Returning visitors:

An average of 45% returning visitors.

### Top 10 of countries:

Greece | United Kingdom | Germany | United states | Cyprus | Italy | France | Switzerland | Netherlands | Canada

### Top traffic channels:

Direct & Organic

### Top visited sections:

RTFI | Flight Tracker | Airlines | Direct flights | TAG Athens

# AIA WEBSITE INNOVATIVE TOOLS & TECHNIQUES III



#### STRATEGIC DIRECTION

AIA website strategy focuses on 3 core pillars:

INFORMATION - DESTINATIONS - COMMERCIALISATION



## Ticket Offers & TAG Athens

**INNOVATIVE TOOLS & TECHNIQUES III** 



AIA has developed two applications **TAG Athens** and **Ticket Offers**.

AIA's initiatives aim at enhancing **ATH connectivity** and **attracting passengers** from/to or via Athens

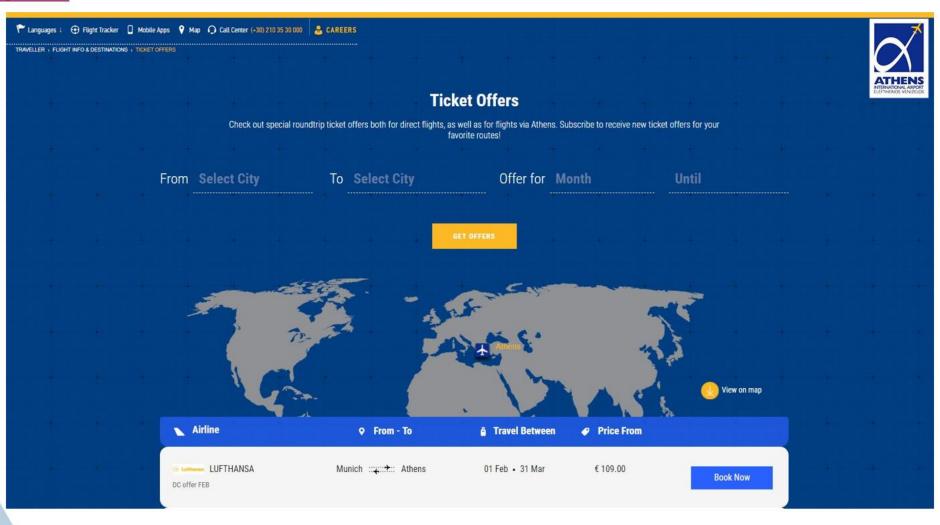
- The best possible online connections via Athens
- Real time information
- Linked to Ticket offers



### TAG Athens & Ticket offers

**INNOVATIVE TOOLS & TECHNIQUES III** 





### Ticket Offers & TAG Athens / The Facts

**INNOVATIVE TOOLS & TECHNIQUES III** 



Launch date: 4th of August 2017

Traffic: 19.400 users

Mobile users: 9,700 users

Average session duration: 00:01:26

Bounce rate: 40%

Airlines already onboard:





























# Display Campaigns INNOVATIVE TOOLS & TECHNIQUES III

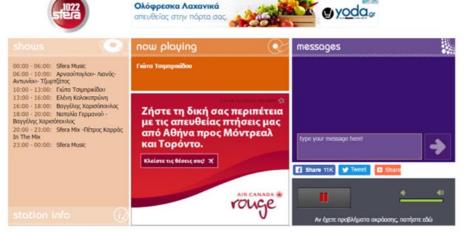








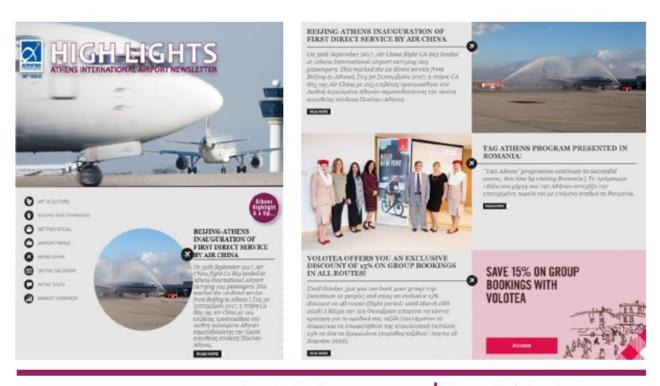




### Digital assets / corporate newsletter

**INNOVATIVE TOOLS & TECHNIQUES III** 





Digital Campaigns | Email Marketing

#### Digital assets / mobile services

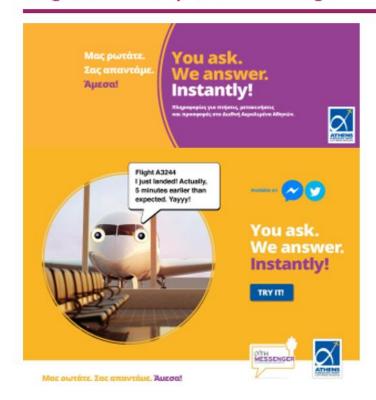
**INNOVATIVE TOOLS & TECHNIQUES III** 



#### Digital Assets | FL10



#### Digital Assets | ATHMessenger



# Digital assets / Athenspotlighted INNOVATIVE TOOLS & TECHNIQUES III



#### Athenspotlighted

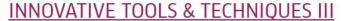


ATHERS INTERNATIONAL ARPORT PRESENTS ATHERS SPOTUDITED



Be on the Spet and discover the unique character, history and cosmopolitan atmesphere of Athens through ideal deals?

VEH CITERS ->















### #athensairport @socialmedia





### #athensairport in the service of airlines' network & destination marketing

ATHENS INTERNATIONAL ARPORT ELET-HEROX SPENZELOS

**INNOVATIVE TOOLS & TECHNIQUES III** 

### #inaugural

#### airlines' network

#Inaugural events

#Live guided tours at aircraft

#Aircraft highlights

#airlinecontests



### #athensairport in the service of airlines' network & destination marketing

**INNOVATIVE TOOLS & TECHNIQUES III** 







#Inaugural events

#Live guided tours at aircraft

#Aircraft highlights

#airlinecontests



Athens International Airport "Eleftherios Venizelos" was live.



Published by Elena Dimopoulou [?] - 20 June 2017 - €

Ξενάγηση στο Dreamliner της #Scoot από τον Captain Eugene Antoni! Welcome Scoot athensairport!



### #athensairport in the service of airlines' network & destination marketing



**INNOVATIVE TOOLS & TECHNIQUES III** 

#### airlines' network

#Inaugural events

#Live guided tours at aircraft

#Aircraft highlights

#airlinecontests



#aircraft highlights



## #AirlineContests in numbers INNOVATIVE TOOLS & TECHNIQUES III



35 Contests

**4,000-33,500** Engagement Rate

7,500 Participants

+100,000 Reach

+800,000 Reach Record



#### #AirlineContests

Reach: 104.605

Engagement: 4.778

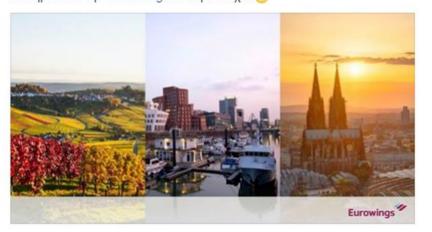
Comments: 1.900



Athens International Airport "Eleftherios Venizelos"

Δημοσιεύτηκε από Elena Dimopoulou [?] - 31 Μαΐου 2017 - 🚱

#airlinescontest\_no20 Κολωνία, Ντίσελντορφ ή Στουτγάρδη? Κάνε like, διάλεξε τον αγαπημένο σου προορισμό & τον αγαπημένο σου φίλο (comment, tag) και ίσως να είσαι ο τυχερός που θα κερδίσεις 2 αεροπορικά εισιτήρια από την #Eurowings! Καλή επιτυχία 🙂



ATHENS NIBRATIONAL ARROW LIETHERIOS VENZEIOS

#### #AirlineContests

Athens International Airport "Eleftherios Venizelos"

Δημοσιεύτηκε από Elena Dimopoulou [?] - 2 Νοεμβρίου 2017 - 🚱

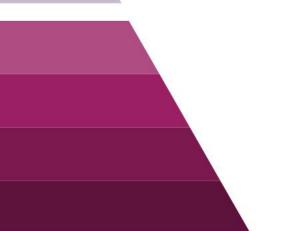
#airlinescontest vo 23 Έτοιμοι για διαγωνισμό? Η Ellinair σας ταξιδεύει σε 6 χώρες! Κάντε like και πείτε μας που αλλού θα θέλατε να δείτε την Ellinair να πετάει! 2 τυχεροί θα κερδίσουν 2 διπλά εισιτήρια εξωτερικού με επιστροφή προς όποιον προορισμό της Ellinair επιλέξουν!» Καλή επιτυχία 😊



Reach: 295.003

Engagement: 14.667

Comments: 5.800



ATHENS NIERATIONAL ARYON

#### #AirlineContests

Reach: 180.450

Engagement: 7.249

Comments: 3.100

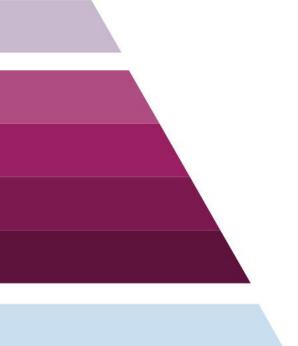


#### Athens International Airport "Eleftherios Venizelos"

Δημοσιεύτηκε από Elena Dimopoulou [?] - 8 Ιανουαρίου · 🚱

Έτοιμοι για τον 1ο διαγωνισμό του 2018? Κάνε like και πες μας (comment) με ποιόν θα διάλεγες να μοιραστείς ένα ταξίδι στη Θεσσαλονίκη! Ένας τυχερός θα κερδίσει 2 εισιτήρια Αθήνα – Θεσσαλονίκη – Αθήνα από την Ellinair! Καλή επιτυχία 😂 #airlinescontest no24





ATHENS NIBRATIONAL ARROY LEFTHEROS VENZEIGN

#### #AirlineContests

Reach: 794.627

Engagement: 33.310

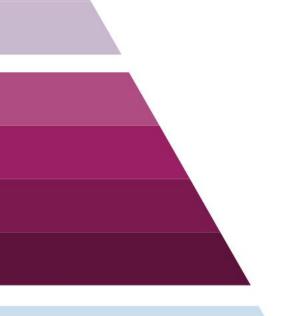
Comments: 7.500



Athens International Airport "Eleftherios Venizelos"

Δημοσιεύτηκε από Elena Dimopoulou [?] - 19 Απριλίου 2017 - 🕲





ATHENS NIBRATIONAL APPORT ELETHEROS VENZELOS

#### #AirlineContests

Reach: 648.540

Engagement: 14.511

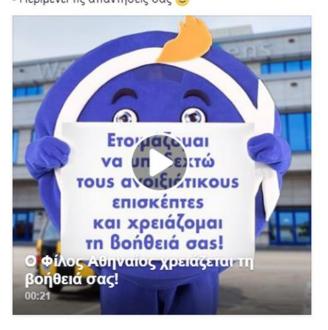
Comments: 7.300

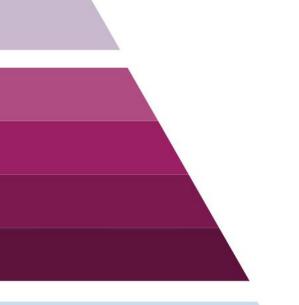


#### Athens International Airport "Eleftherios Venizelos"

Δημοσιεύτηκε από Elena Dimopoulou [?] · 1 Φεβρουαρίου στις 5:36 μ.μ. · Θ

Βοηθήστε το «Φίλο τον Αθηναίο» να διαλέξει ένα από τα παρακάτω αξεσουάρ που χαρακτηρίζει την αθηναϊκή άνοιξη και κερδίστε ένα ταξίδι για 2 στη Νέα Υόρκη με την Emirates!





### #Influencers are all around us...

**INNOVATIVE TOOLS & TECHNIQUES III** 



- Influencers is the evolving new trend
- Airlines involve Influencers in their communication strategy
- #Alitalia\_AthensTelAviv
- 20 Influencers, Bloggers, Tourism Press representatives

# #Influencers & Bloggers Fam trip INNOVATIVE TOOLS & TECHNIQUES III



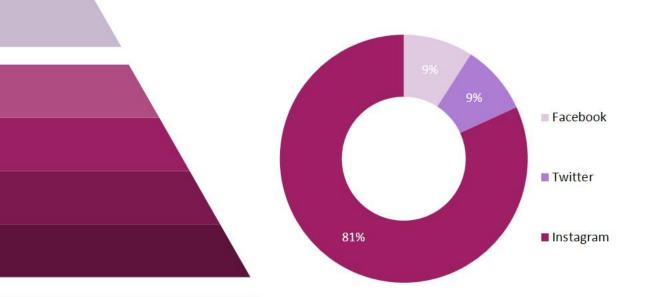


7 articles

1 radio reference

**INNOVATIVE TOOLS & TECHNIQUES III** 







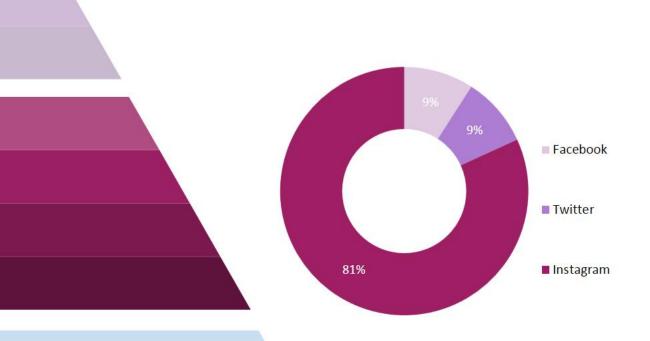
#### Τελ Αβίβ: Εναλλακτικός city break προορισμός - Travel Agent

Μοναδικό κράμα δύσης και ανατολής Η επιστροφή των Εβραίων της διασποράς από όλες τις μεριές του κόσμου, δημιούργησε μια πόλη με στοιχεία από την...

TRAVEL-AGENTEU



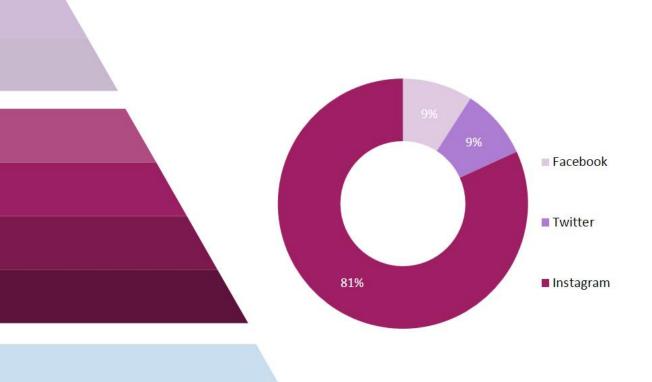
**INNOVATIVE TOOLS & TECHNIQUES III** 







**INNOVATIVE TOOLS & TECHNIQUES III** 





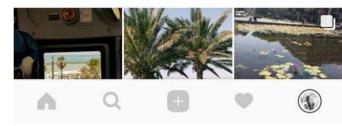


#### Κορυφαίες δημοσιεύσεις



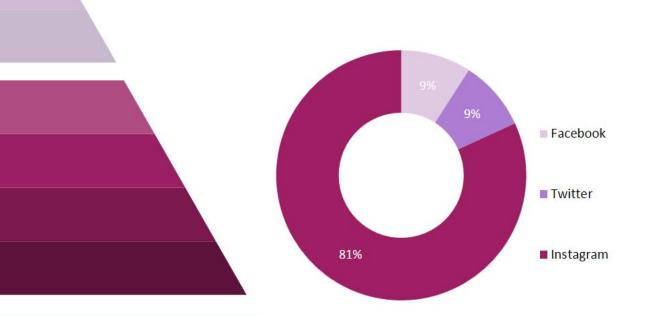
Πιο πρόσφατα

25 δημόσιες αναρτήσεις

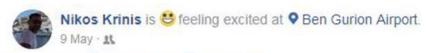




**INNOVATIVE TOOLS & TECHNIQUES III** 







Landed! #alitalia #alitalia athens telaviv



Electra Alevriti and 28 others

#### #athensairport loves #Athens **INNOVATIVE TOOLS & TECHNIQUES III**





Athens International Airport

"Eleftherios Venizelos" Like This Page - 1 February - ©

0000

**Targeted FB contest** 

destination marketing

Poland

Areas that have direct flights to

Athens in 2018

Support of Hellenic National

**Meteorological Service** 

Trigger question: "How many days in February the temperature in Athens will exceed 10o C in the early afternoon"

### #Influencers are all around us... again





- Take advantage of the influencers' power in favour of Athens
- Promote Athens as a year round destination
- In collaboration with Scoot
- 6 Asian influencers
- With the support of City of Athens Convention & Visitors Bureau
- Showcase the magnificent Athenian experience
- A great number of posts & stories, tweets & articles about Athens and
   Scoot

#### #Influencers & Bloggers are all around us #again

**INNOVATIVE TOOLS & TECHNIQUES III** 



#### Greece travel: New Year in Athens, Greece

ruthdelacruz | travel and lifestyle blog

greece travel: new year in athens, greece







#### Greece just got a little bit closer



#### Ruthilicious

11 January - @

Greece just got closer!

Fly to Athens for as low as Php 10,754!

Check out my experience flying with FlyScoot + tip on when you can book a promo flight! http://www.ruthdelacruz.com/.../manila-to-athens-fly-scoot-ai... #flyscoot



#### Manila to Athens Flight via Scoot | Fly to Greece for Only Php 10,754!

Experience Greece for only Php 10,754! Scoot Promo. My Manila to Athens Flight Experience via Scoot Airlines.

RUTHDELACRUZ COM

Learn More

IN LINES / Utlase

→ Share

## Athens, Greece: Travel guide, itinerary, first impressions

ruthdelacruz | travel and lifestyle blog

rath dela cras is a travel and lifestyle blogger in the philippines, the leves writing about her adminstrated across, the interest has when as prothibitions.

STANS SECTION SCHOOL



athens, greece: travel guide, itinerary, budget, impressions and practical tips



Greece is (was once) a dream. (2) It may not be the most popular travel destination for Winter Vacation but we did fiv and welcome the New Year in Athens.

Sharing with you stories, travel tips, itinerary, budget and photos from our recent Winter Greek Holiday.

about rath

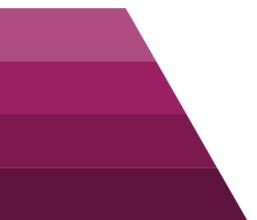
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I WAMDER and Wonder.

For collaborations, apacial projects, love notes & marriage proposals, plasse send a note:

connect with me





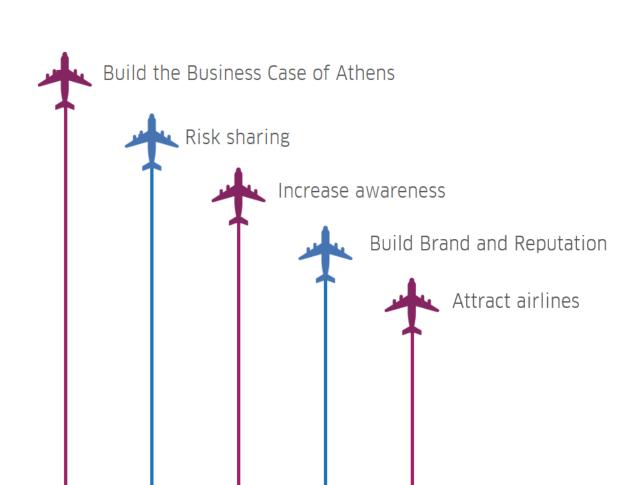
### **CREATIVITY**

# Promoting Airport to Airlines CREATIVITY











# Promoting Airlines to Passnegers <a href="#">CREATIVITY</a>



Promoting Airlines to Passengers





## Marketing Support

**CREATIVITY** 

ATHENS NIBNATIONAL APPORT





Radio productions 15

Facebook contests for the airlines



Inaugural, trade & press events

40

Stories included in our monthly newsletter

An average participation of at least

30 Media representatives at the press events

70 Trade representatives at each trade event

An extensive post publicity of



Print clippings

400

Digital articles per event

record in social media organic of

793, 000 people 7k
post likes

20

Banners hosted at www.aia.gr

50, 000

views of media content posted on AIA's own social media pages

25

branded vehicles for outdoor promotion of the airlines at the public means of transportation

2board

outdoor campaigns at the terminal premises

25

insertions of airlines

55

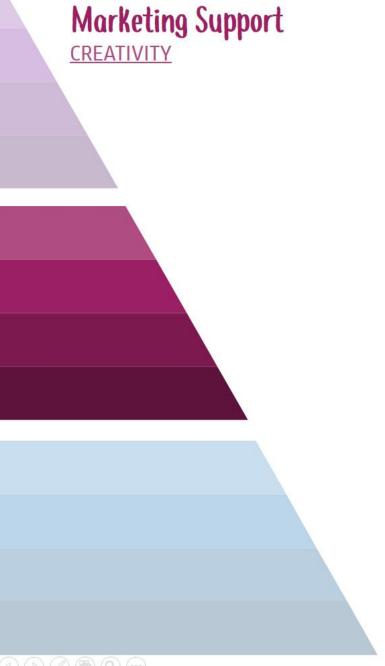
destinations promoted at 2Board magazine

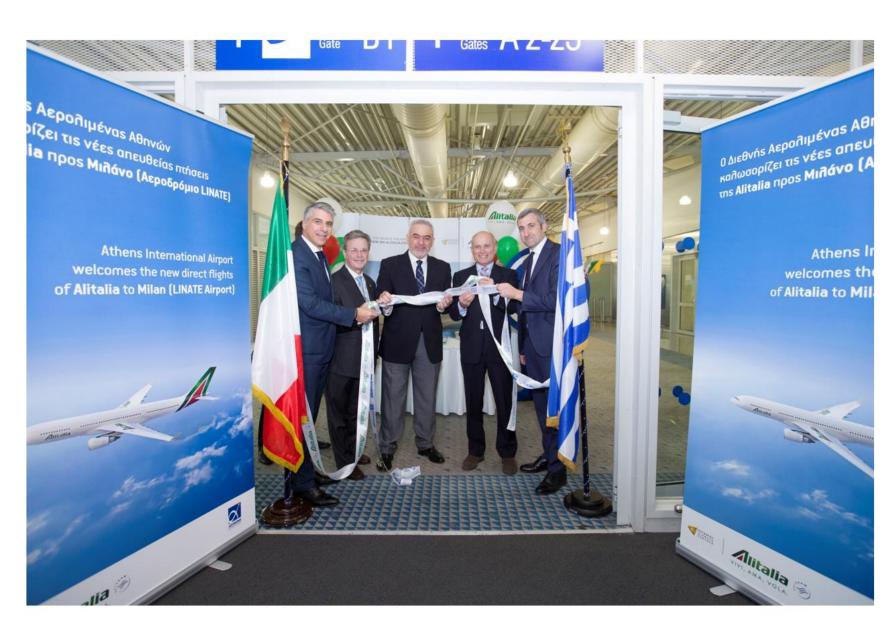






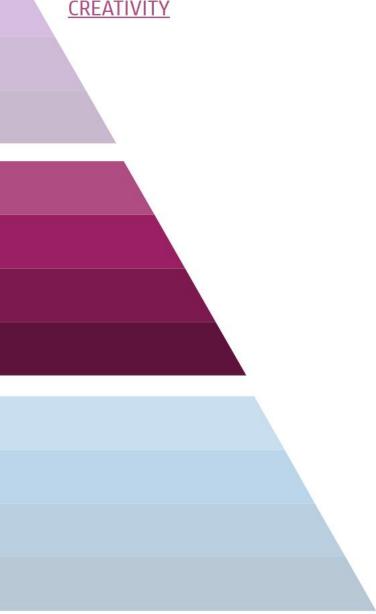






# Marketing Support <a href="#">CREATIVITY</a>





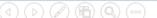
















#### Emirates "TAGs" Athens!

A NEW EXCITING DEVELOPMENT IN THE FRAMEWORK OF "TAG ATHENS" PROGRAM, THE SCHEME THAT AIMS TO SUPPORT ATHENS AS AN INTERMEDIATE POINT, IS NOW ON... AIR! | MIA NEA EYNAPTAETIKH EEFLIZH ETO TIMALTIO TOY TIPOTPAMMATOE "TAG ATHENS". TIOY EXELEKTIOTIO THIN ENLEXYEH THE MASYNALEZIMOTHTAE THE ABHINAE, BPLEKETAI TIMEON ETON AEPA!

assengers travelling from Cyprus to Newark Liberty through the Athens Airport, can now enjoy the excellent services and the unique travel experience that Emirates offers, as the company "Tags" Athens, as an intermediate destination in its network.

The "TAG Athens" program is among Athens International Airport's strategic goals and a focal point in internation and proper strategy and a focal point in the common developmental elforts of the airport and its airline partners. The program was introduced in 2015 by AIA, to implement the goal of enhancing Athens' connectivity and the devolopment of its hubbing potential. It invites the passengers from nearby countries (Cyprus and countries of the greater Balkan area) through the message. "Athens connects you to the world, TAG Athens as an intermediate point on your route".

During a joint trade event that took place in Nicosia AlA and Emirales promoted the Athens-Newark Emirates' route to bur operators targeting Cyprus informing them of the company's new offers available for all travelers flying from Cyprus to Newark Liberty via Athens International Airport (AIA) as well as for the fact that as of August 3, the airline will have the capability to promote them on AIA's web page.

Furthermore, from August 3, through the same process all the airlines will have the opportunity to promote their current deals for their direct flights to Athens.

Operating an impressive fleet being made up completely of Boeing 777s and Airbus A380s, Emirates continues to thrill passengers of all Classes with its high comfort and quality services.

From July 1st to 31st travelers eager to fly from Lamaka to New York during 10/9/2017 - 31/3/2018, can book their tickets starting from €565 (all inclusive, T&Cs apply) in Economy Class.



λέον, οι απβάτας που τοξιδείουν από την Κύπρο με προσρισμό το Newark Liberty, μένα του αφρόξουμου πις Αθήνας, μπορούν να απολούσουν τις εξαιριστικός υπηροείες και τη μοναδίκαι τοξιδιμιατικό εμπορία που προσφέρει ο Πεπίτα και, καθάς πι απορεία κόται "Ταρ" την Αθήνα ως ονδιδιμέσου προσρομμό στο δίσια ότιτς! Το συγκαγυμένοι πρόγραμμα, το "TAG Alheres", αποτελεί έναν από τους στρατιγγιανίς στάνους του αφρόξουμίου και επίκαντρο της κοινής προσπάθιας του Δειθνούς Αφρολιμένα Αθήνιούν και των αφροπρογιών σταιραίου.

Το πρόγραμμα διαμορφώθηκε το 2015 από τον ΔΑΑ για την υλοποίηση του στέχου ενίσχυσης της διασυνδεσιμότητας της Αθήνας και της ανάπτυξης της κομβικής δυναμικής της και προσκαλεί το ταξιδιωτικό κοινό από γειτονικές χώρες (Κύπρο και χώρες της ευρύτερης περιαχής των Βαλκανίων), με μήνυμα «Η Αθήνα σε "συνδέει" με τον κόσμο. Βάλε στο χάρτη σου την Αθήνα ως ενδιάμεσο σταθμό». Έτσι, κατά τη διάρκεια κοινής εκδήλωσης τον Ιούλιο στη Λευκωσία, η Emirates και ο ΔΑΑ προώθησαν τη διαδρομή Αθήνα-Newark της Emirates σε ταξιδιωτικούς πράκτορες που εστιάζουν στην Κύπρο, ενημερώναντάς τους για τις ελκυστικές προσφορές της εταιρείας, που είναι διαθέσιμες με ενδιάμεσο σταθμό την Αθήνα, καθώς και για το γεγονός ότι, από την 3η Αυγούστου και εξής, η αεροπορική εταιρεία θα έχει τη δυνατότητα να τις προβάλλει μέσω της ιστραελίδας του ΔΑΑ. Αντίστοικα, από την 3η Αυγούστου και μετά, μέσω του ίδιου μπκανισμού, και οιλοιπές αεροπορι-

κές επιφείες θα όσουν τη δυνατάπτα να προβολίουν της ακτόσουσης και επιφείες θα όσουν τη δυνατάπτα να προβολίουν της ακτόσουσης ποτο τροσφρής τους για τις απευθείας συνδόσεις τους με την Αθτίνα. Η Επιπίατεις, με όνα ντιπισουισκό απόλιο που απευθείται αποιολιαστικό από Βοσίης 777s και Ακτίνως Αλθόδο, συνσείζει τους επιβάτεις όλουν του Θέσουν προσφρόσουπος μονοθούσεις απόσεις και ποιοιιστικός μπηροσίες Από την έπιδως και την 31η Ιουλίου, οι επιβάτεις που απάφερού ναι πετάξουν από την Αφαίναι στην Νέα Υδρίσκι το διόστημο 1019/2017-3/39/2018 μπορούν να κλικέσουν το ευσιπήριά τους στι τιμές που ξεκινούν από το 6565 στην Οικονομική θέσει (συμπερβλημβαγερικόν λόμιν των φόρικες μπόσους δια δυσικού που Αρουσιαστικό το Επικούν από το 6565 στην Οικονομική θέσει (συμπερβλημβαγερικόν λόμιν των φόρικες μπόσους δια το Αρουσιαστικό το που προσφράδους το προσφράσεις το που προσφράδους το Επικούν του Ανακούν που προσφράδους το Επικούν που προσφράδους το Επικούν που προσφράδους το Επικούν που προσφράδους το Επικούν που προσφράδους του που προσφράδους που π





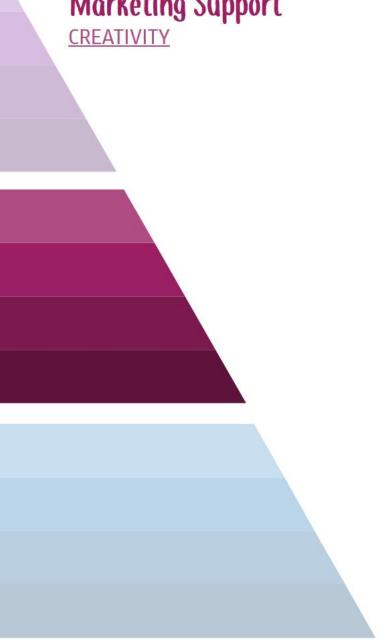


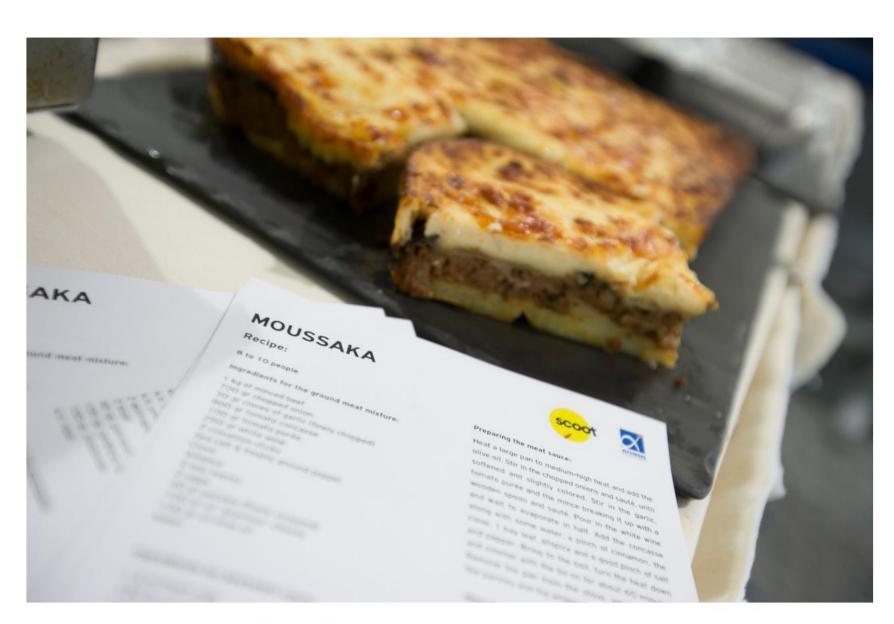




## Marketing Support



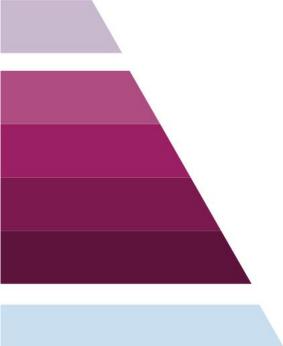














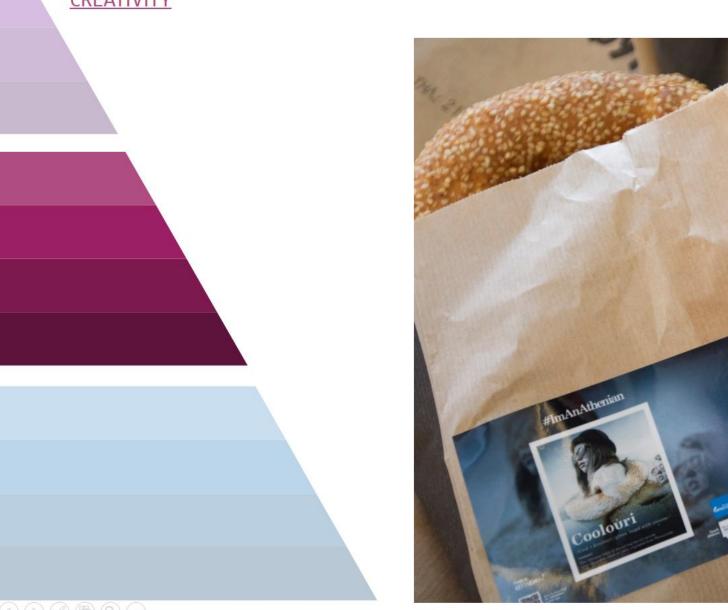




# Where do you enjoy your Koulouri best?

In a Monastiraki stroll downtown Athens, or at the ramp in front of an aircraft?









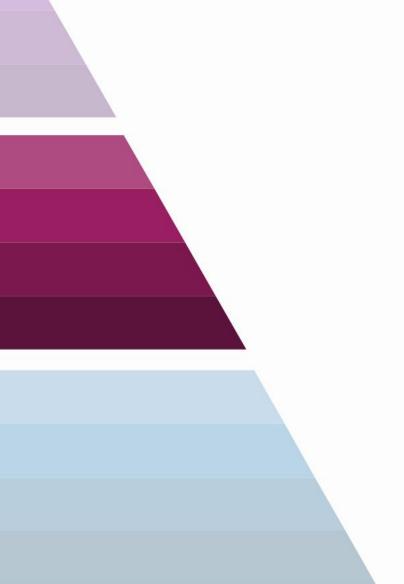












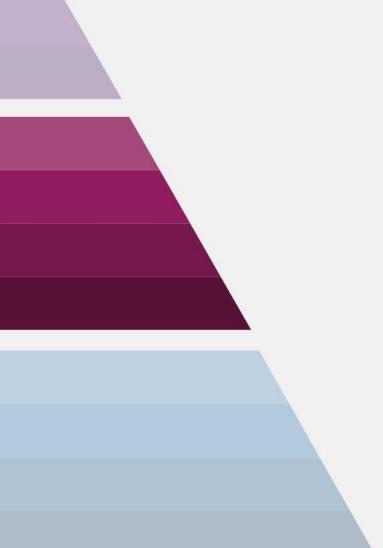






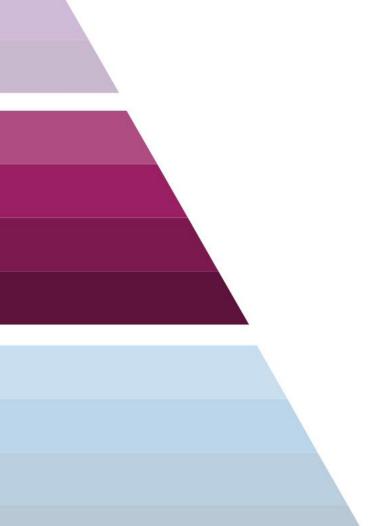




























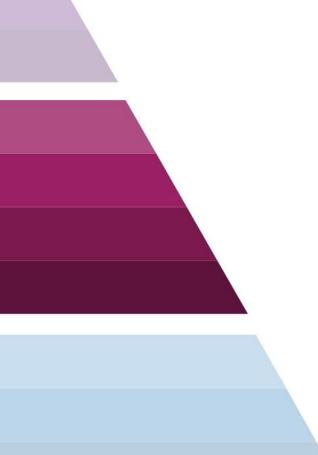
















Alitalia (6)



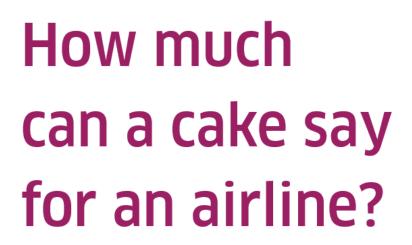
# Marketing Support <a href="https://example.creativity">CREATIVITY</a>











#### Marketing Support

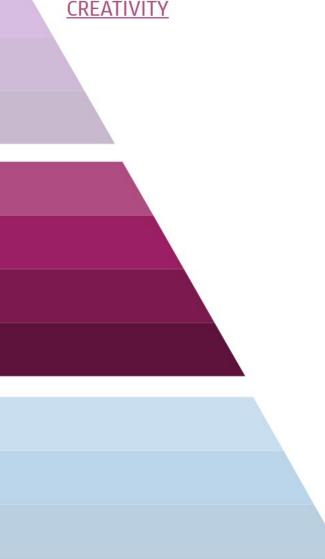
**CREATIVITY** 





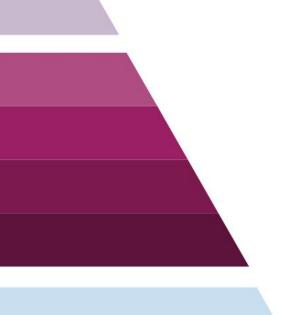






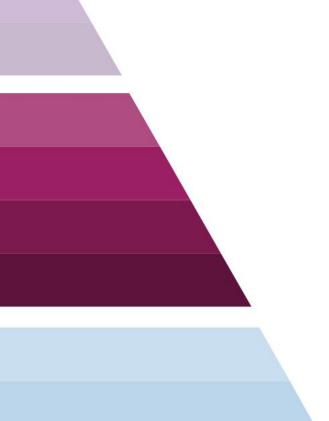




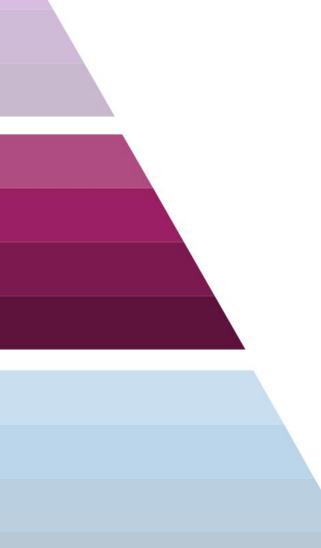


















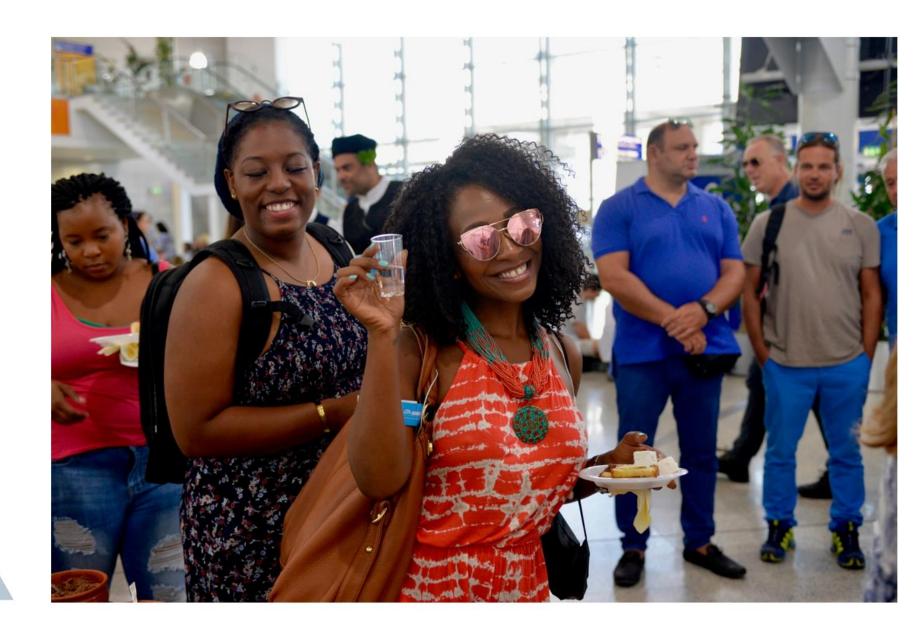


















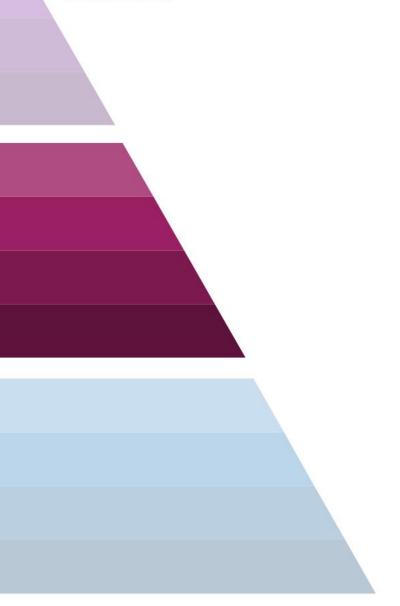






















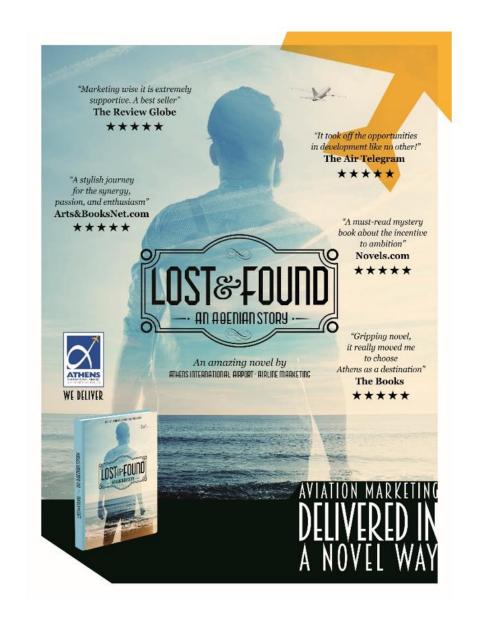


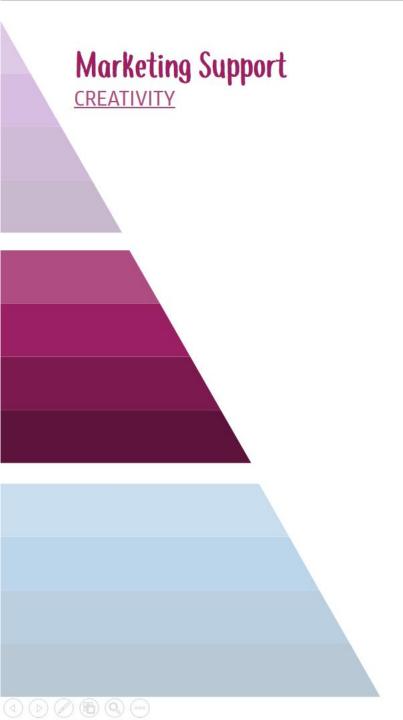
#### Marketing Support



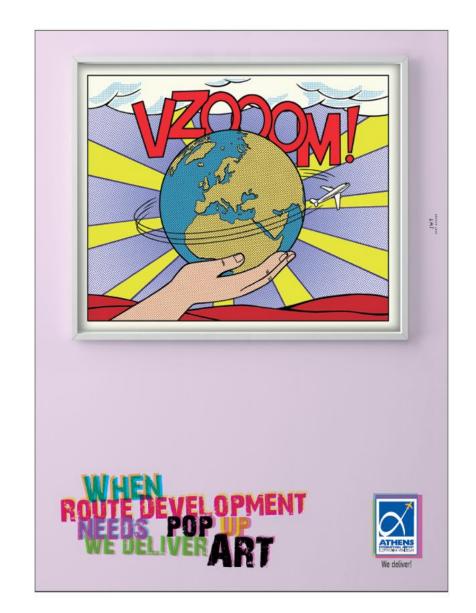










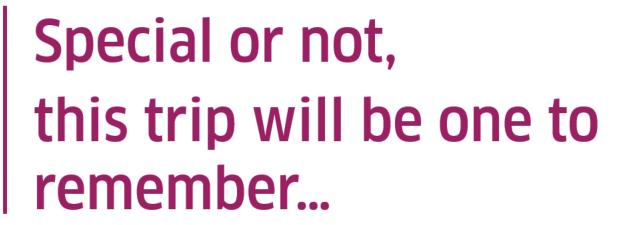












# Marketing Support <a href="#">CREATIVITY</a>





## Marketing Support <a href="https://example.com/reativity">CREATIVITY</a>





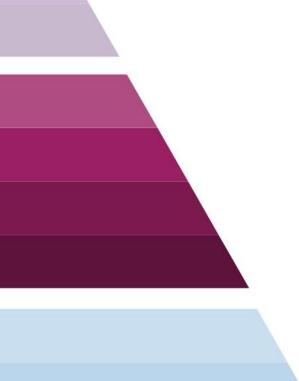








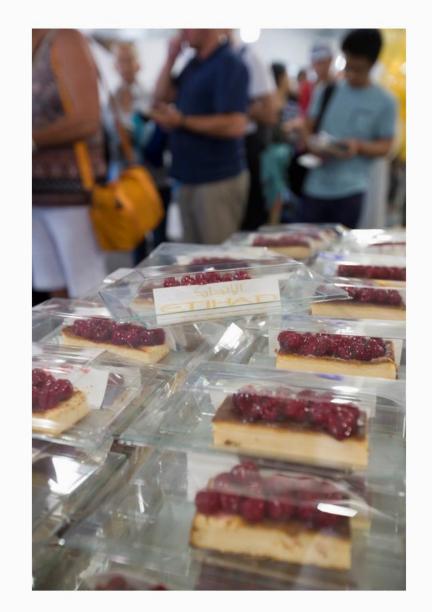






# Marketing Support <a href="#">CREATIVITY</a>





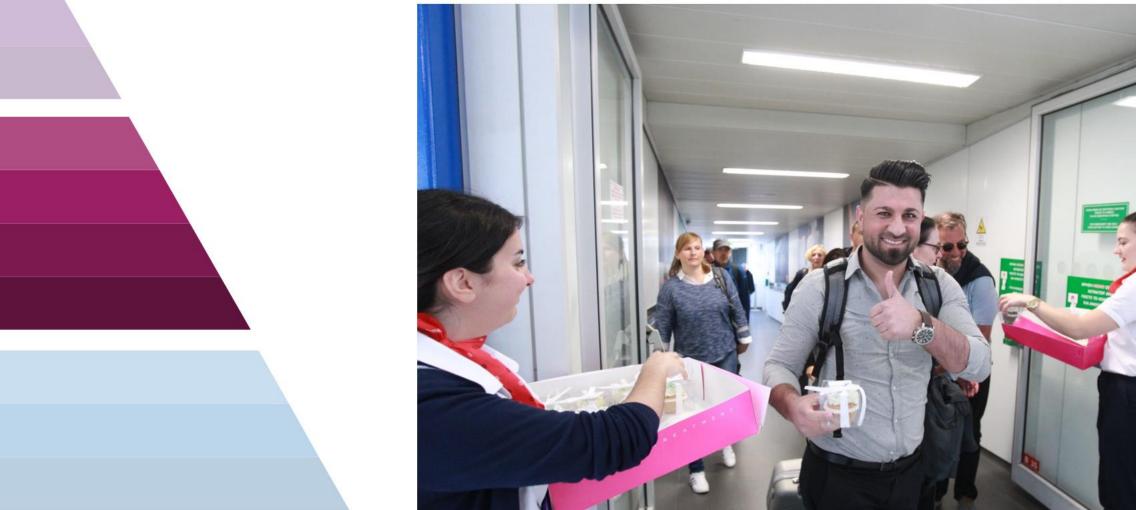












# Marketing Support <a href="#">CREATIVITY</a>





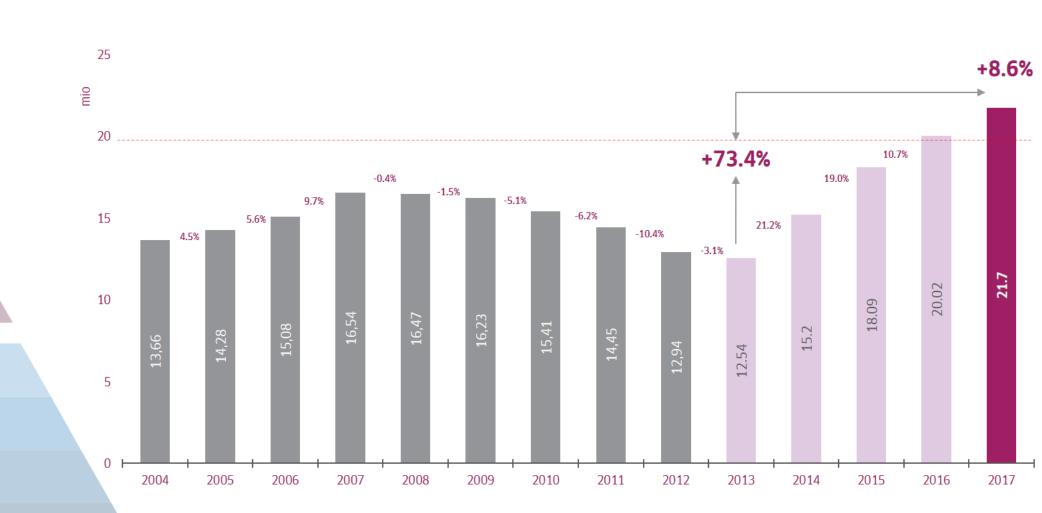


# ATHENS' CONNECTIVITY ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION DEVELOPMENT OF MARKET SEGMENTS DEVELOPMENT OF TRAFFIC



## **DEVELOPMENT OF TRAFFIC**

## An all-time high performance in 2017... DEVELOPMENT OF TRAFFIC

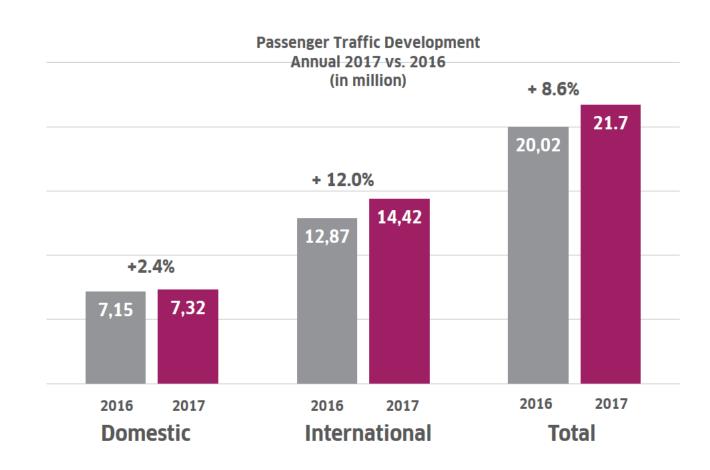


Overview 2017





**DEVELOPMENT OF TRAFFIC** 

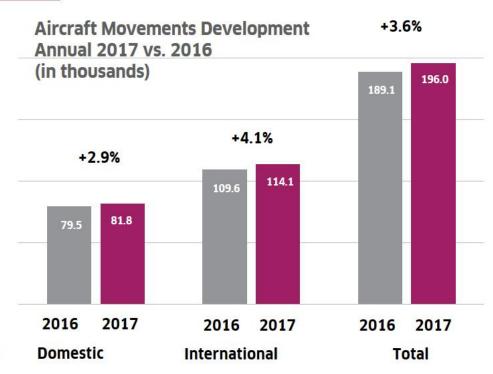


Overview 2017

## Offered capacity with relatively slow increase & high and improved LF



**DEVELOPMENT OF TRAFFIC** 





Airline Load Factors	Annual 2016	Annual 2017	Δ%
Domestic	78.7%	81.2%	2.5
International	78.3%	82.7%	4.4
Total	78.5%	82.2%	3.7

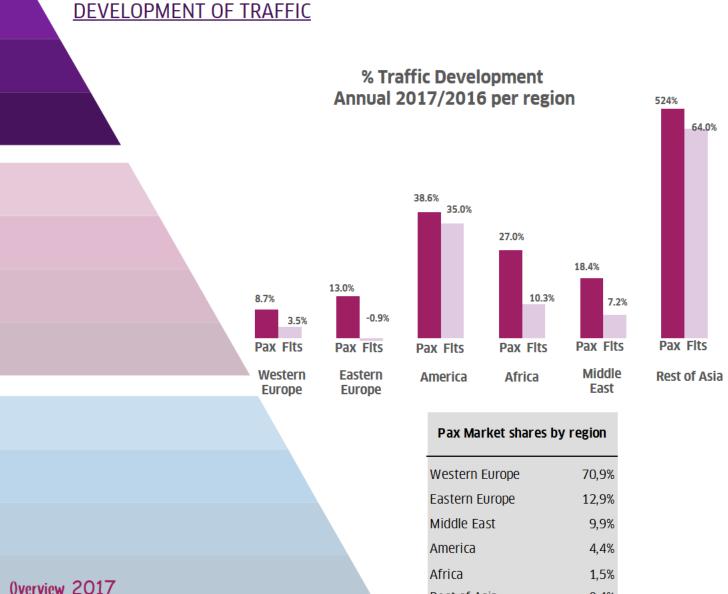
Overview 2017

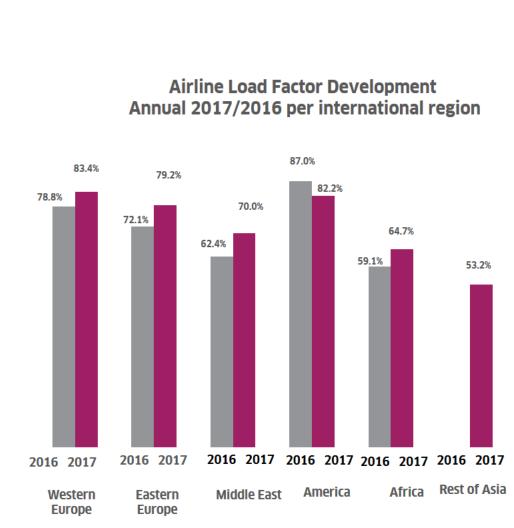
## Favourable evolution in all int'l regions & LF exceeding 80% in Europe and America

0,4%

Rest of Asia







## Diverse evolution among dom destinations, mainly driven by capacity

ATHENS
INTERNATIONAL ARPORT
ELEFTHERIOS VENIZELOS

**DEVELOPMENT OF TRAFFIC** 

Top 15 Domestic Destinations Scheduled Traffic Development Annual 2017/2016

	% Pax Growth	Pax Rank Total 2017
Thessaloniki	-11.8%	1
Thira/Santorini	15.1%	2
Heraklion	7.3%	3
Rhodes	2.7%	4
Chania	-4.0%	5
Mikonos	22.9%	6
Kerkyra/Corfu	0.4%	7
Mitilini	-7.7%	8
Kos	10.1%	9
Alexandroupolis	1.7%	10
Chios	5.4%	11
Paros	94.8%	12
Samos	-7.5%	13
Ioannina	-7.2%	14
Zakinthos	23.3%	15

# Overall positive evolution in Europe DEVELOPMENT OF TRAFFIC



**Top 15 European Destinations Scheduled Traffic Development Annual 2017/2016** 

	-	
	% Pax Growth	Pax Rank Total 2017
London	-0.8%	1
Larnaca	13.9%	2
Rome	1.4%	3
Paris	-4.1%	4
Istanbul	8.4%	5
Frankfurt	18.4%	6
Zurich	1.4%	7
Munich	6.5%	8
Milan	2.8%	9
Amsterdam	29.5%	10
Brussels	14.5%	11
Berlin	5.5%	12
Bucharest	21.2%	13
Moscow	24.6%	14
Vienna	18.0%	15

## Impressive growth of non-European destinations

ATHENS INTERVITORAL AND TO

**DEVELOPMENT OF TRAFFIC** 

#### Non-European Destinations Scheduled Traffic Development Annual 2017/2016

	% Pax Growth	Pax Rank Total 2017
Tel Aviv	44.4%	1
New York	60.0%	2
Dubai	25.2%	3
Doha	11.0%	4
Cairo	30.0%	5
Beirut	11.9%	6
Abu Dhabi	-1.5%	7
Toronto	12.2%	8
Montreal	46.6%	9
Philadelphia	10.8%	10
Amman	0.3%	11
Singapore	NEW	12
Tehran	-23.3%	13
Bahrain	19.9%	14
Jeddah	39.9%	15
Beijing	125.4%	16
Alexandria	-7.0%	17
Riyadh	-27.0%	18

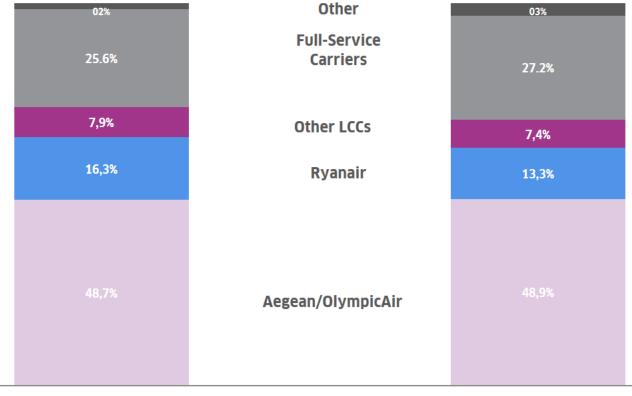


### **DEVELOPMENT OF MARKET SEGMENTS**





#### Major airline segments' contribution in passenger traffic Annual 2017/2016



Overview 2017

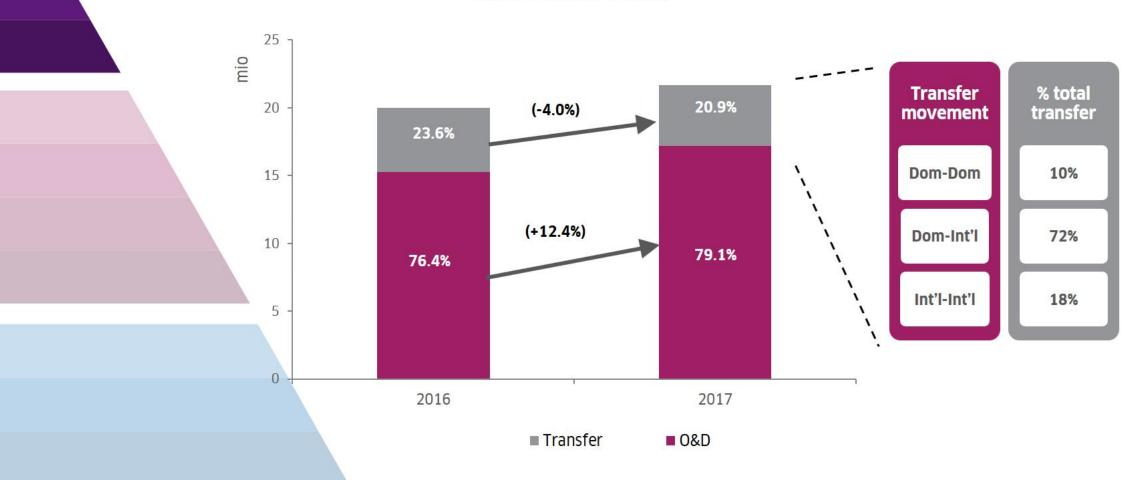
Jan-Dec 2017

## Dynamic growth of 0&D passengers vs transfer traffic

ATHENS INTERNATIONAL APPORT ELEFTHERIOS VENZEIGE

**DEVELOPMENT OF MARKET SEGMENTS** 

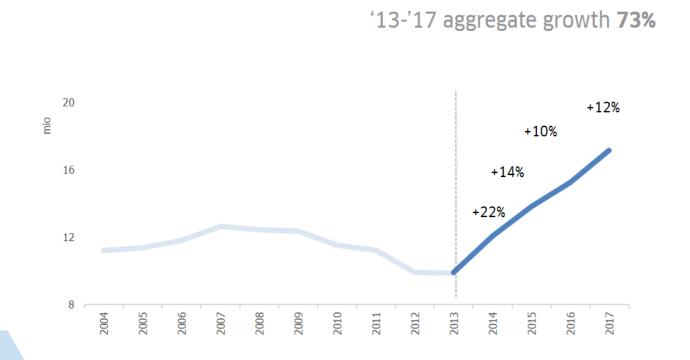


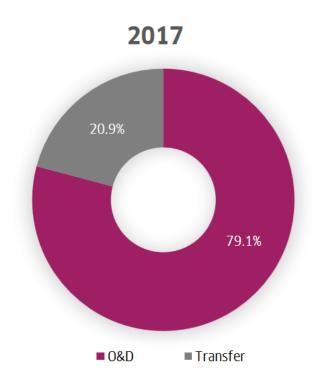


## 0 & D strong rebound 2013 to 2017 & traffic split

ATHENS INTERNATIONAL ARRORT ELEFTHERIOS VENUZEJOS

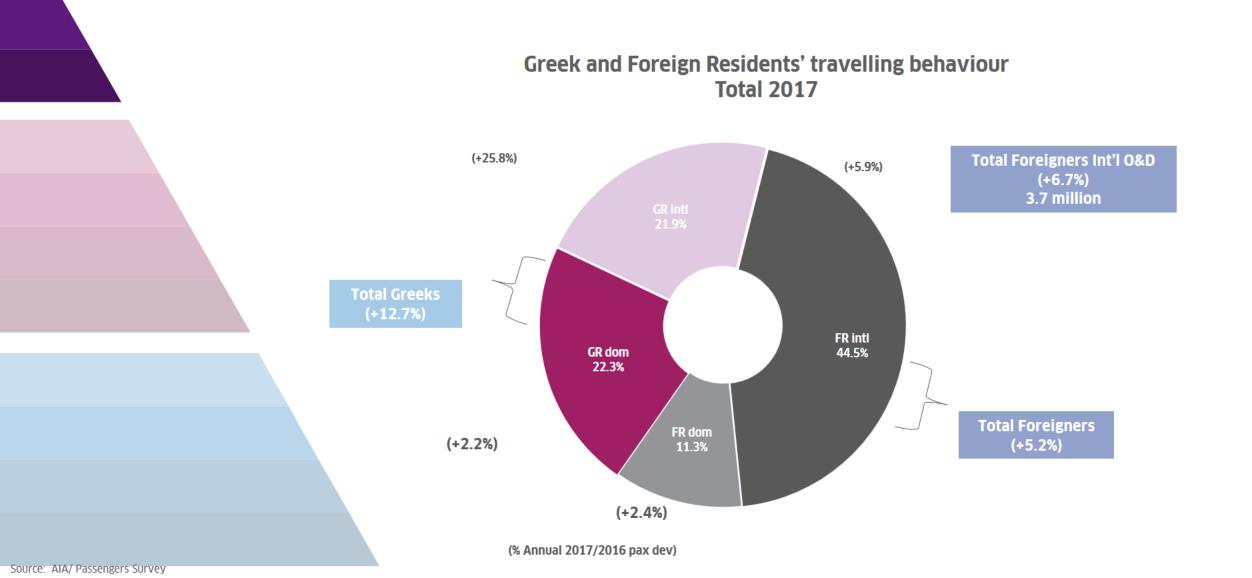
**DEVELOPMENT OF MARKET SEGMENTS** 





## •

## Greek residents achieve robust rise, esp. internationally, while foreign residents grow as well... DEVELOPMENT OF MARKET SEGMENTS



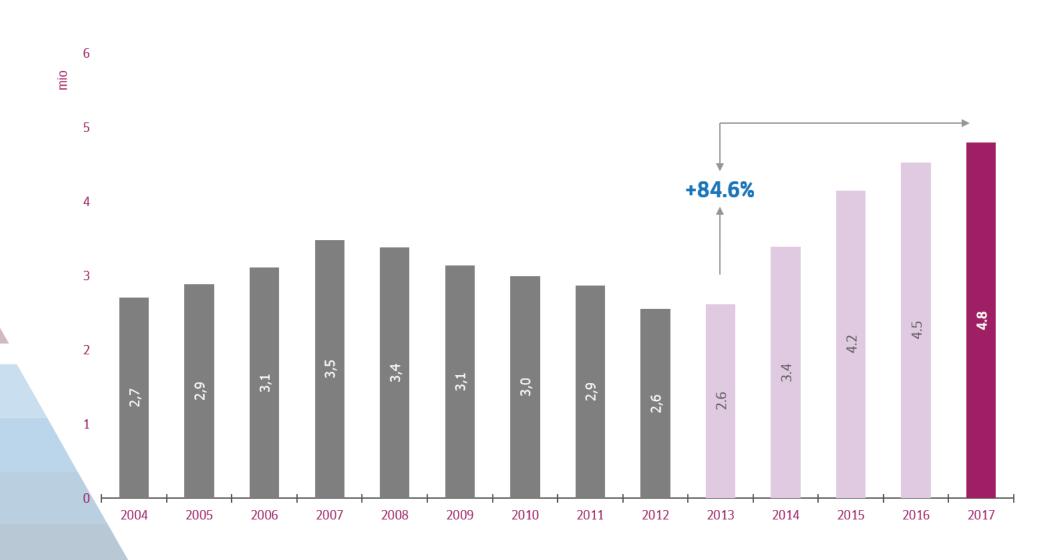


## ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION

## Int'l foreign resident arrivals further increased in 2017 reaching the all-time high of 4.8 million



ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION



## Destination Marketing Initiatives & Development of Foreign Residents Int'l Arrivals



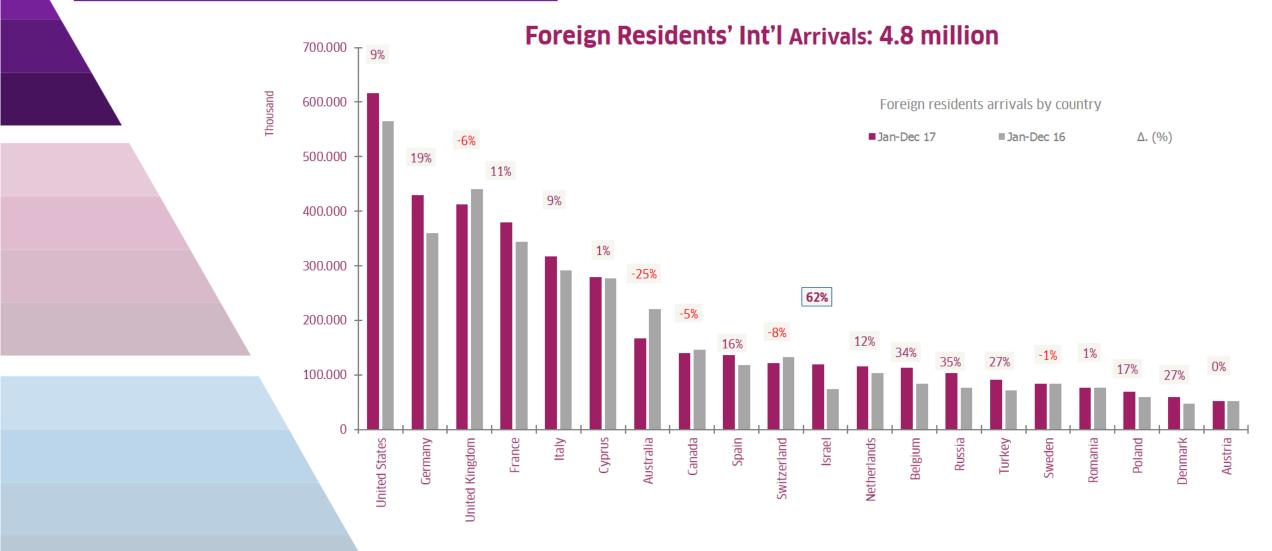
ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION



## 0&D Foreign Residents' International Arrivals grew by + 6.7% compared to 2016



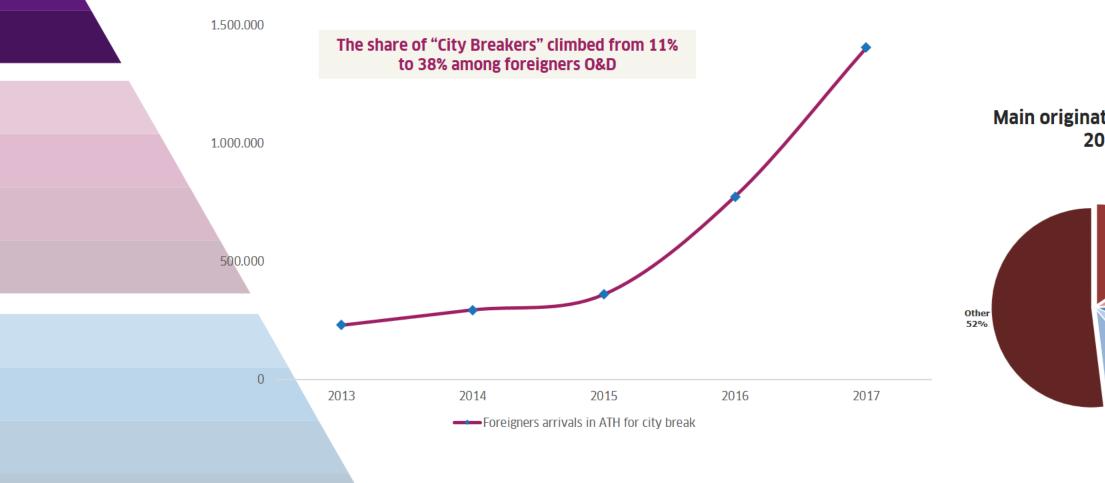




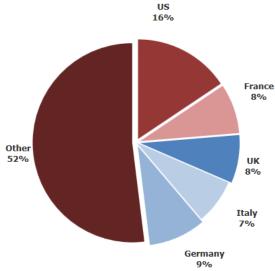
## Evolution of City Breakers 2013-2017; a spectacular growth



ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION



#### Main originating countries 2017



# Seasonality evolution, PAX traffic 2013 to 2017 ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION

Cumulative '13 to '17 = 2,6 mio pax





### ATHENS' CONNECTIVITY

## Summer 2017 enhancing the Long Haul market

**ATHENS' CONNECTIVITY** 





## +10 New routes

- Scoot -> Singapore
- Aegean -> Kalamata, Kassel, Kuwait, Podgorica, Strasbourg
- Volotea -> Genoa
- Germania -> Bremen, Nuremberg
- TUS Airways -> Haifa
- Air China -> Beijing (direct as of Sep. 30<sup>th</sup>)

## +8 Airlines with new services on existing routes

- Emirates -> Newark (NYC)
- Aegean -> Edinburgh
- Ryanair -> Sofia
- Alitalia -> Tel Aviv, Linate
- Air France -> Marseille, Nice, Toulouse
- Cobalt -> Paphos
- Eurowings -> Stuttgart
- Sky Express -> Karpathos, Ikaria, Chios, Naxos, Skiathos, Syros, Astypalaia, Kithira, Milos, Paros, Zakinthos

+31
Weekly flights
in new routes

+3
New airlines

+258 additional weekly flights

## Winter '17-'18 developmental upsurge

ATHENS' CONNECTIVITY



Weekly flights in new routes

> new operators in the route, during W'17/18

**New International routes** 

- easyJet -> Bristol
- Fmirates -> Newark
- Ryanair -> Krakow, Katowice, Poznan
- Scoot -> Singapore
- Alitalia -> Linate
- Air Moldova -> Chisinau
- Norwegian -> Oslo

over 200 Weekly flights added during W'17/18

Airlines with new +12 services on existing routes



## Additional daily services

- Aeroflot -> Moscow
- KIM -> Amsterdam

Extension of Peak season in routes (Nov/Mar or Dec/Jan)

## Summer 2018, ...the expansion of the Network continues — Niche routes substantial increase



+46 New airport destinations from airlines on new & existing routes

New airlines

Based airline

+320 additional weekly frequencies vs Summer 2017

additional DAILY frequency:

transavia Amsterdam

ETIHAD Abu Dhabi

**Lufthansa** Frankfurt

COBALT Larnaca

Alitalia Milan / Linate







#### **AEGEAN**

ATHENS' CONNECTIVITY

Malaga, Basel, Cluj, Porto, Turin, Verona, Zadar, Lamezia-Terme, Bologna, Genoa, Palermo, Zagreb



Billund, Baden-Baden. Memmingen, Gdansk, Katowice, Lodz. Lappeenranta, Poznan. Rzeszow, Vilnius, Wroclaw, Aalborg, Billund,



Clui, Katowice, Kutaisi, Luton, Vilnius, Budapest, Chisinau, Bucharest, Sofia



Stockholm, Copenhagen, Gothenburg











Alexandroupolis. Kefallonia, Mitilini, Samos



Dresden







#### **DESTINATION MARKETING**



ATHENS' CONNECTIVITY

ATHENS AS A CITY-BREAK / YEAR-ROUND DESTINATION

**DEVELOPMENT OF MARKET SEGMENTS** 

**DEVELOPMENT OF TRAFFIC** 

**CREATIVITY** 

**INNOVATIVE TOOLS & TECHNIQUES** 

STATISTICAL ANALYSIS

MARKET RESEARCH

DISRUPTION/ INNOVATION

CUSTOMER UNDERSTANDING / RISK-SHARING

STRATEGIC THINKING

STATE-OF-THE-ART SERVICES



# THE Pair FUME OF THE ATHENIAN SPRING

18TH AIRLINE MARKETING WORKSHOP

