

Overall brand favourability for Greece continues to trend up in both Canada and the US.

September 2022 – Tracking the Hellenic Brand since 2013

Nanos Presentation

Nik Nanos, Chief Data Scientist





Nanos is a Canadian-based research firm which gathers world-class intelligence in Canada, the United States and Europe.

Since 2015, the Team has been monitoring and tracking the Hellenic brand in Canada. The purpose of the initiative is to support the Republic and its important work advancing the reputation of Greece as a great place to visit, a dynamic place to invest and as an important NATO security partner.

This project was initiated and is sponsored by Nanos with no expectation other than to share insight on the opportunities to make Greece stronger.

Chief Data Scientist and Founder

HCapt(Navy) Nik Nanos, BA (Hons), MBA, CMC, CAIP, FCRIC





Overview

CANADA: Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1038 Canadians, 18 years of age or older, between July 29th to August 2nd, 2022, as part of an omnibus survey. The margin of error for a random survey of 1038 Canadians is ± 3.1 percentage points, 19 times out of 20.

US: Nanos conducted an online non-probability survey of 1,107 Americans, representative of the US population, 18 years of age or older, on July 21st to 22nd, 2022 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted using the latest Census results to be representative of the American population.

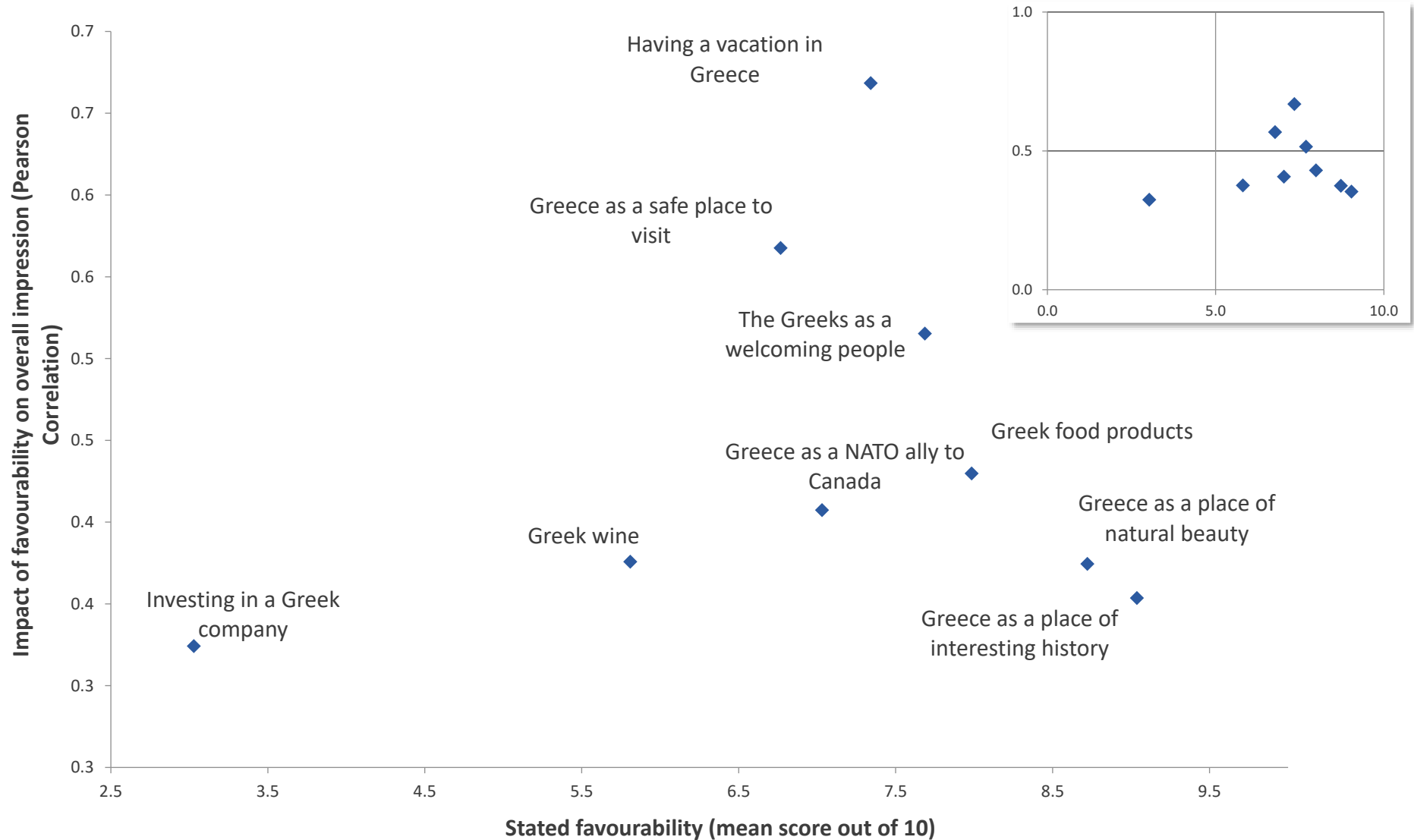
The research was commissioned by the Hellenic Republic and was conducted by Nanos Research.

- **Derived Importance Maps**
- **Return to International Travel**
- **Favourability and Visiting Greece**
- **Drivers of Favourability**

Hellenic Republic Derived Importance Map - Canada

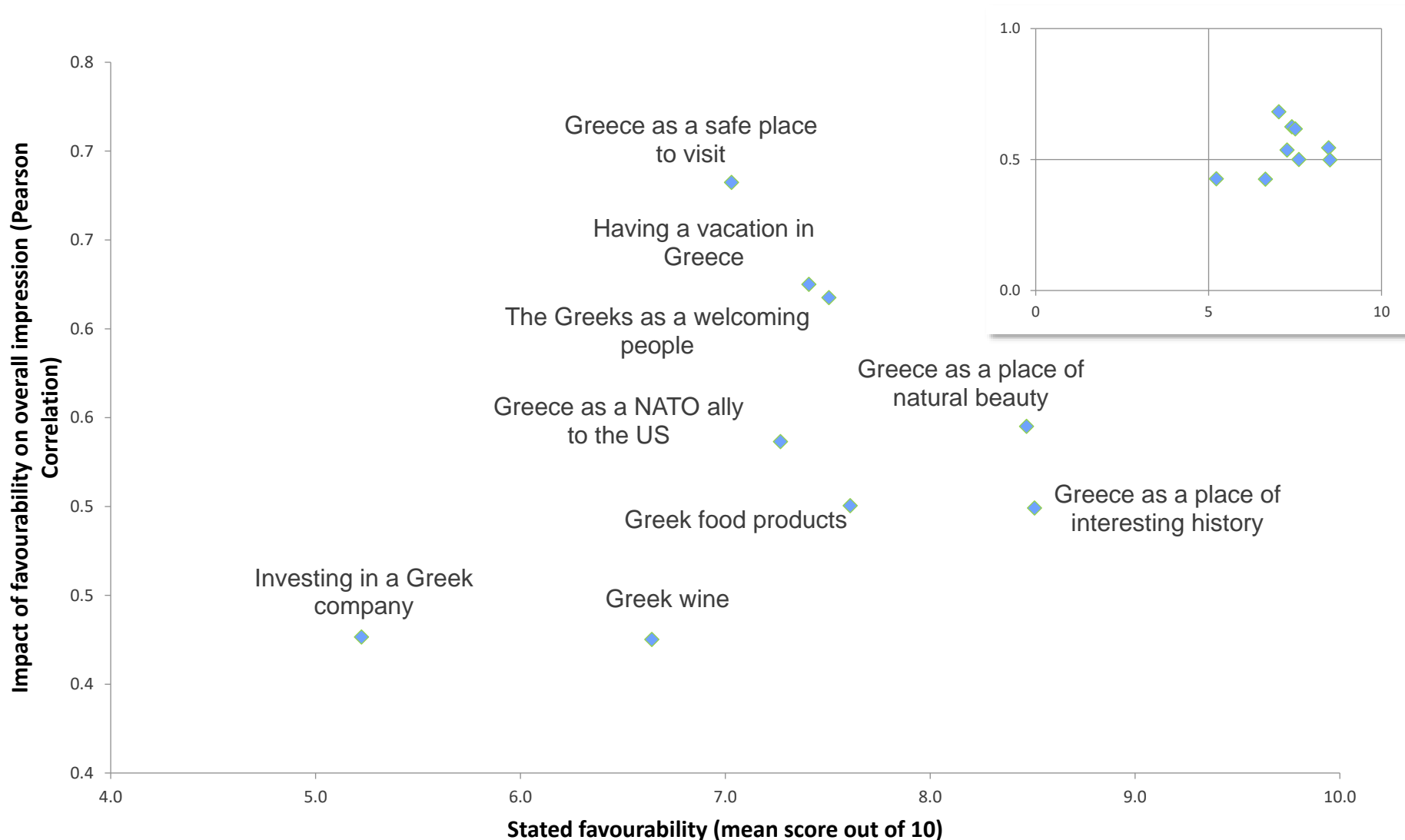
The Pearson Correlation score indicates the relationship between favourable impressions of Greece and stated favourability of Greek variables. A value of +1 is total positive linear correlation, 0 is no linear correlation, and -1 is total negative linear correlation.

While having a vacation in Greece and Greece as a safe place to visit remain the most likely drivers of a favourable impression of Greece, favourability of having Greece as a NATO ally has gone up (7.0 out of 10, up from 6.6 in 2020) and its Pearson Correlation score has also increased from the ninth highest to fifth (0.41 compared to 0.32 in 2021).





Hellenic Republic Derived Importance Map - US

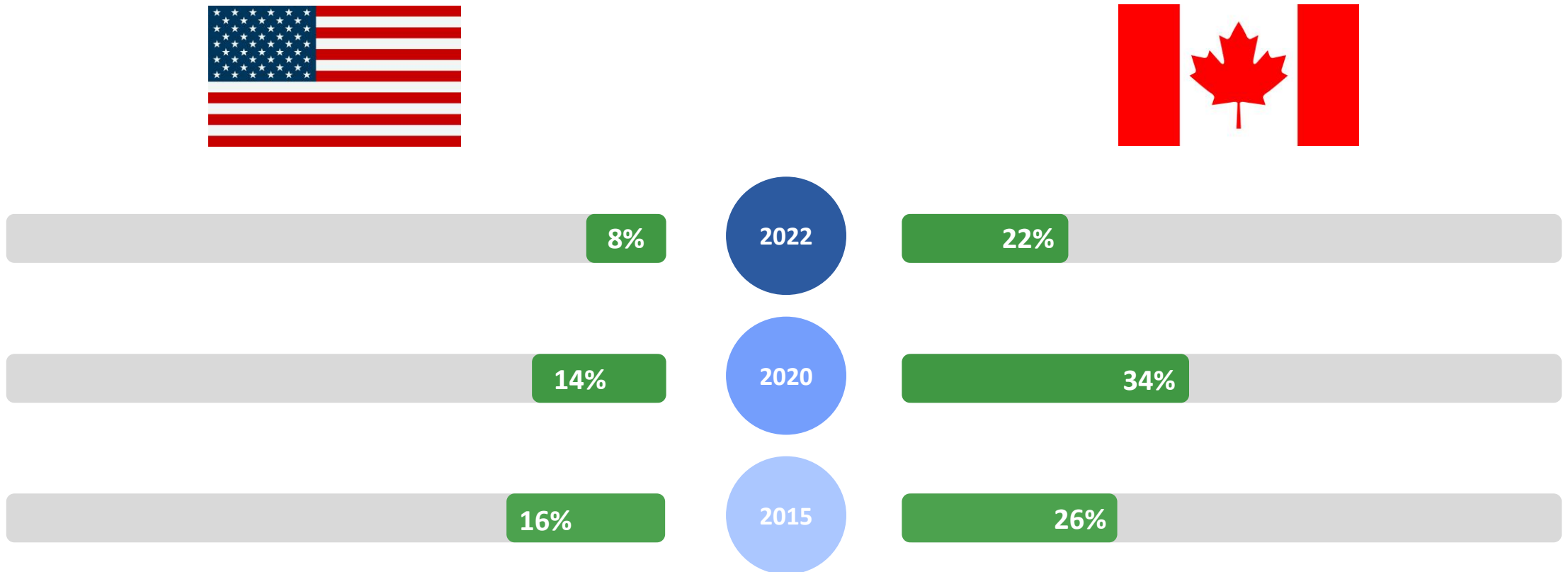


The Pearson Correlation score indicates the relationship between favourable impressions of Greece and stated favourability of Greek variables. A value of +1 is total positive linear correlation, 0 is no linear correlation, and -1 is total negative linear correlation.

While having a vacation in Greece and Greece as a safe place to visit remain the most likely drivers of a favourable impression of Greece, favourability of Greece as a NATO ally has gone up (7.3 out of 10, up from 7.2 in 2021) and its Pearson Correlation score has also increased (0.53 compared to 0.23 in 2021).

Frequency of vacations in another country declining

Appetite for international travel continues to **decline** for both Canadians and Americans, with about one in five Canadians (22%) who say they regularly take vacations in another country (27% in 2021; 34% in 2020). Eight per cent of Americans say they regularly take a vacation in another country compared to 14% in 2020 and 16% in 2015.



Q - Do you consider yourself someone who takes a vacation in another country regularly, occasionally, or never?



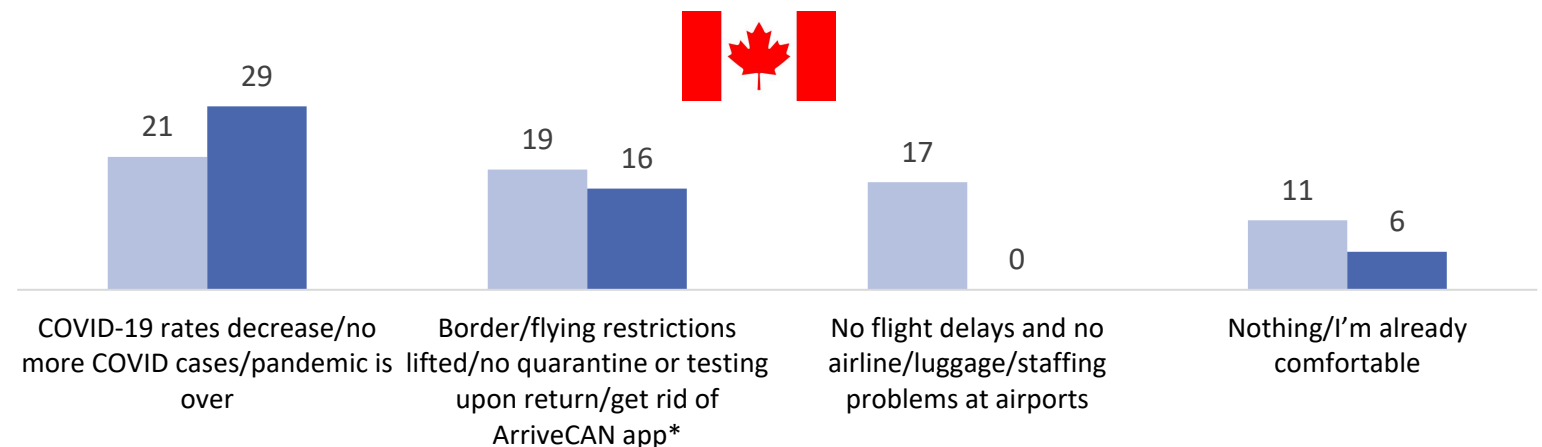
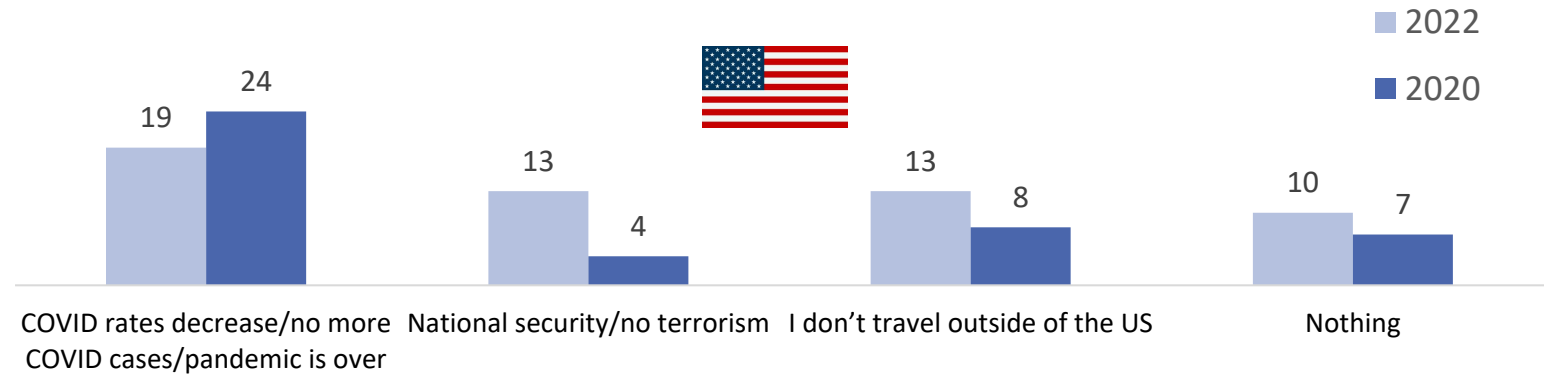
COVID-19 rate decrease

Both Americans and Canadians say a decrease in COVID-19 rates is the factor that would make them comfortable to travel outside their country.



Factors influencing return to international travel

COVID-19 rate decrease is the top factor mentioned by both Americans and Canadians when it comes to being comfortable to travel outside of their country again.



Q - Thinking of your next trip to another country, what needs to happen for you to be comfortable to travel outside of the United States/Canada? [Open-ended]

Overall Favourability

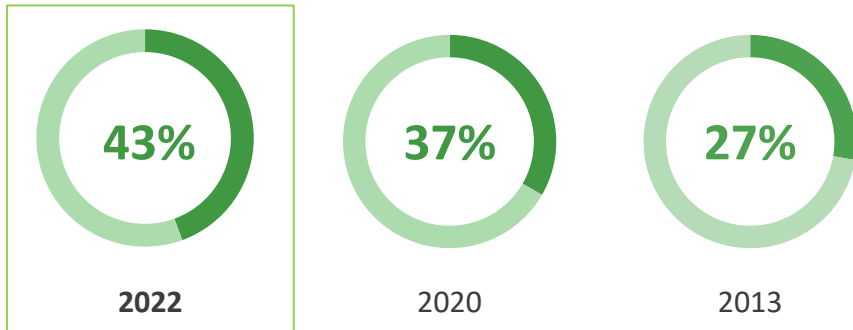
The overall favourability score for Greece overall continues an upward trend is at an **all time high for both Americans and Canadians**, with now three in ten saying they have a favourable impression of Greece (29%) and over four in ten Americans saying they have a favourable impression (43%), both **significantly higher than** when tracking began in **2013** (US-27%, Canada-10%)



USA

Overall favourability of Greece continues to climb in **2022 (mean of 7.3)** with an increase of 1.2 points in the mean score since **2013 (mean of 6.1)**

Americans with Favourable impression



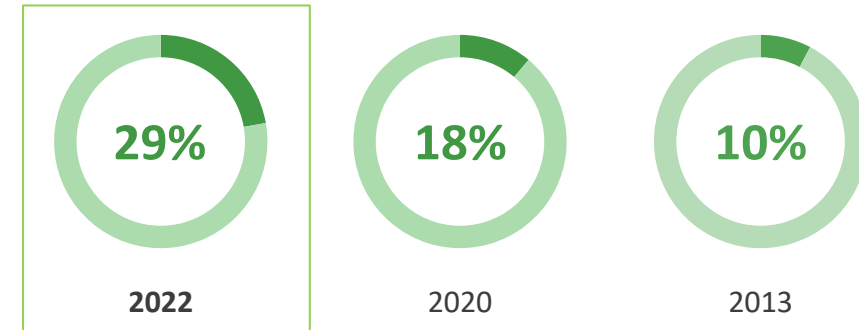
VS



CANADA

Overall favourability of Greece continues an upward trend in **2022 (mean of 6.9)** among Canadians with an increase of 2.4 points in mean score since **2013 (mean of 4.5)**

Canadians with Favourable impression



Consider visiting Greece

About two in three Americans (65%) as well as Canadians (62%) say they would consider visiting Greece, both on an upward trend since tracking began.

Americans are over three times more likely to consider (66%) travelling to Greece than not consider it (18%).



66%

2022

Would Consider visiting Greece

62%

Would consider

2020

58%

Would consider

2013



Six in ten Canadians say they would consider visiting Greece (62%), continuing a significant upward trend since 2020 (44%).

2022

62%

Would Consider visiting Greece

44%

Would consider

2020

66%

Would consider

2013

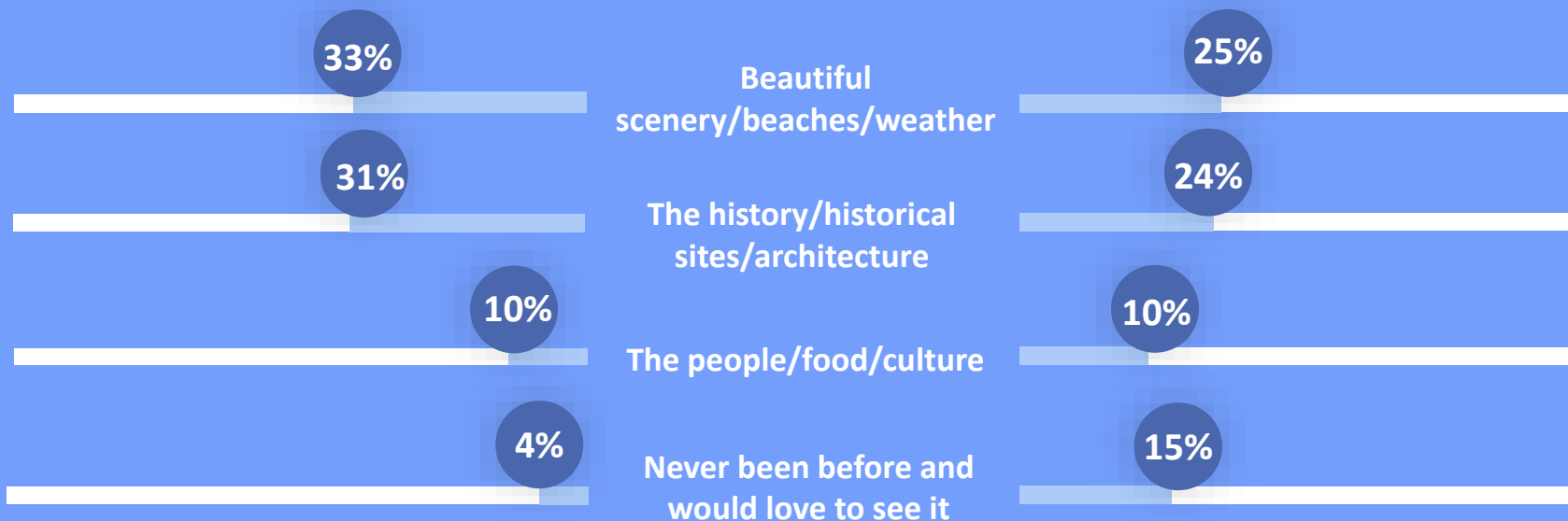


Reasons for considering visiting Greece



CANADA

USA



Q - What are the main reasons you WOULD consider taking a vacation in Greece? [Open-ended]



Reasons for NOT considering visiting Greece



CANADA

18%

High cost/can't afford to go

17%

Instability/Safety concerns

15%

No reason against going

9%

Not interested/other places I'd rather visit

USA



24%

No reason against going

15%

High cost/can't afford to go

13%

Instability/Safety concerns

11%

COVID-19 pandemic

Q - What are the main reasons you WOULD NOT consider taking a vacation in Greece? [Open-ended]

Top Drivers of Favourability

The top drivers of favourability for **both Americans and Canadians** remain Greece as a place of interesting history, Greece as a place of natural beauty and Greek food products.

• United States of America



Greece as a place of interesting history

74% favourable

Mean

8.5

Greece as a place of natural beauty

72% favourable

8.5

Greek food products

54% favourable

7.6

• Canada



Greece as a place of interesting history

84% favourable

Mean

9.0

Greece as a place of natural beauty

77% favourable

8.7

Greek food products

60% favourable

8.0



Thank You



Element	Description	Element	Description
Research sponsor	Nanos Research	Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Population and Final Sample Size	1038 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Source of Sample	Nanos Panel	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Type of Sample	Probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Estimated Response Rate	Ten percent, consistent with industry norms.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Question Order	Question order in the tabulations reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, economic issues, sexual misconduct in hockey and views on Pierre Poilievre.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Research/Data Collection Supplier	Nanos Research
Number of Calls	Maximum of five call backs to those recruited.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.		
Field Dates	July 29 th to August 2 nd , 2022.		
Language of Survey	The survey was conducted in both English and French.		
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/		

Element	Description	Element	Description
Research sponsor	Nanos Research	Weighting of Data	The results were weighted by age and gender using the latest Census information and the sample is geographically stratified to ensure a distribution across all regions of the United States. See tables for full weighting disclosure.
Population and Final Sample Size	1107 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data
Source of Sample	QuestMindshare	Excluded Demographics	Individuals younger than 18 years old; individuals without internet access could not participate.
Type of Sample	Representative non-probability	Stratification	By age and gender using the latest Census information and the sample is geographically stratified to be representative of the United States. Smaller areas were marginally oversampled to allow for a minimum regional sample.
Margin of Error	No margin of error applies to this research	Estimated Response Rate	Not applicable
Mode of Survey	Online survey	Question Order	Question order in the tabulations reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	Non-probability	Question Content	All questions asked are contained in the report.
Demographics (Captured)	Northwestern US, Southern US, Midwestern US, Western US; Men, Women, and Other; 18 years and older. Zip code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Demographics (Other)	Age, gender, education, income	Research/Data Collection Supplier	Nanos Research
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.
Field Dates	July 21 st to 22 nd , 2022.		
Language of Survey	The survey was conducted in English.		
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/		

TECHNICAL NOTE – USA

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