# PILOT DESTINATION MANAGEMENT PLAN
# FOR RHODES

**European Bank**
for Reconstruction and Development

European Bank for Reconstruction
and Development (EBRD) in cooperation
with The Ministry of Tourism and the
Chamber of Dodecanese

**A**

**DMP Pilot Programme Progress Review**

**B**

**Destination Management Planning**
Role and Value

**C**

**Rhodes DMP**
Where Are We Now?

**D**

**Rhodes DMP**
Where Do We Want to Be in 10 Years?
Aim, Vision, Objectives

**E**

**Rhodes DMP**
How Do We Get There?
Strategic Priorities and Action Plan

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**Rhodes DMP**
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**Governance and Funding**

**H**

**Critical Success Factors & Discussion**

A

DESTINATION MANAGEMENT PLAN

# PILOT PROGRAMME PROGRESS REVIEW

# Key Project Partners

European Bank
for Reconstruction and Development

—

HELLENIC REPUBLIC
MINISTRY OF TOURISM

TEAM

—

YELLOW RAILROAD

—

TOPOSOPHY

CHAMBER OF
DODECANESE

—

CHAMBER OF
CYCLADES

—

SETE

# Milestones

| | |
|---|---|
| Desk research | **MAY** |
| Main consultation | **JUNE** |
| Surveys of industry, consumers and community | **JULY – AUGUST** |
| Interviews with key stakeholders and experts | **JULY – AUGUST** |
| Strategy Discussion Papers | **JULY – AUGUST** |
| Draft Destination Management Plans & DM Guide | **SEPTEMBER** |
| Presentations to stakeholders + Final Report | **OCTOBER** |
| Dissemination events (Athens, Corfu and Chania) | **OCTOBER** |
| Project completion | **by 31 OCTOBER** |

**B**

DESTINATION MANAGEMENT PLANNING

# ROLE AND VALUE

# Context of Destination Management Planning

- Global tourism growth and the need to differentiate

- The search for experiences and authenticity

- Sustainability takes centre stage

- Increasing focus on destination management

- National policies on attracting new, higher yield markets

- Thomas Cook collapse drives market restructuring

- Major industry and employer on Rhodes

# Definition:
# Destination Management Planning as the Basis for Sustainable Tourism

Destination Management Planning is a process that enables people in a destination to decide how they want tourism to contribute to their economic and social life and take steps to achieve this.

This should cover "all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment."

# DMP Approach
## 4 QUESTIONS

**1.** Where is Rhodes in tourism now?
SITUATION ANALYSIS

**2.** Where does Rhodes want its tourism to be in 2030?
THE VISION

**3.** How does Rhodes get there?
THE STRATEGY & ACTION PLAN

**4.** How will we measure success?
MONITORING

# DMP Approach
## 4 CORE PRINCIPLES

1. **Targeting** those **visitors who will provide the greatest benefit** to the destination, in terms of spend, length of stay, season of visit, propensity to travel beyond the 'honeypots', and, most importantly, their (responsible) behaviour in the destination.

2. **Developing** the destination, its infrastructure and tourism products and experiences, so that it appeals to those **visitors who will provide the greatest benefit** to the destination.

3. Identifying and managing any potentially **negative impacts** of tourism before they damage the place or undermine community cohesion.

4. Securing **residents' understanding** of tourism as a driver of the local economy, social cohesion, and environmental conservation, so that they welcome visitors and commit to tourism as an important and positive contributor to their daily lives.
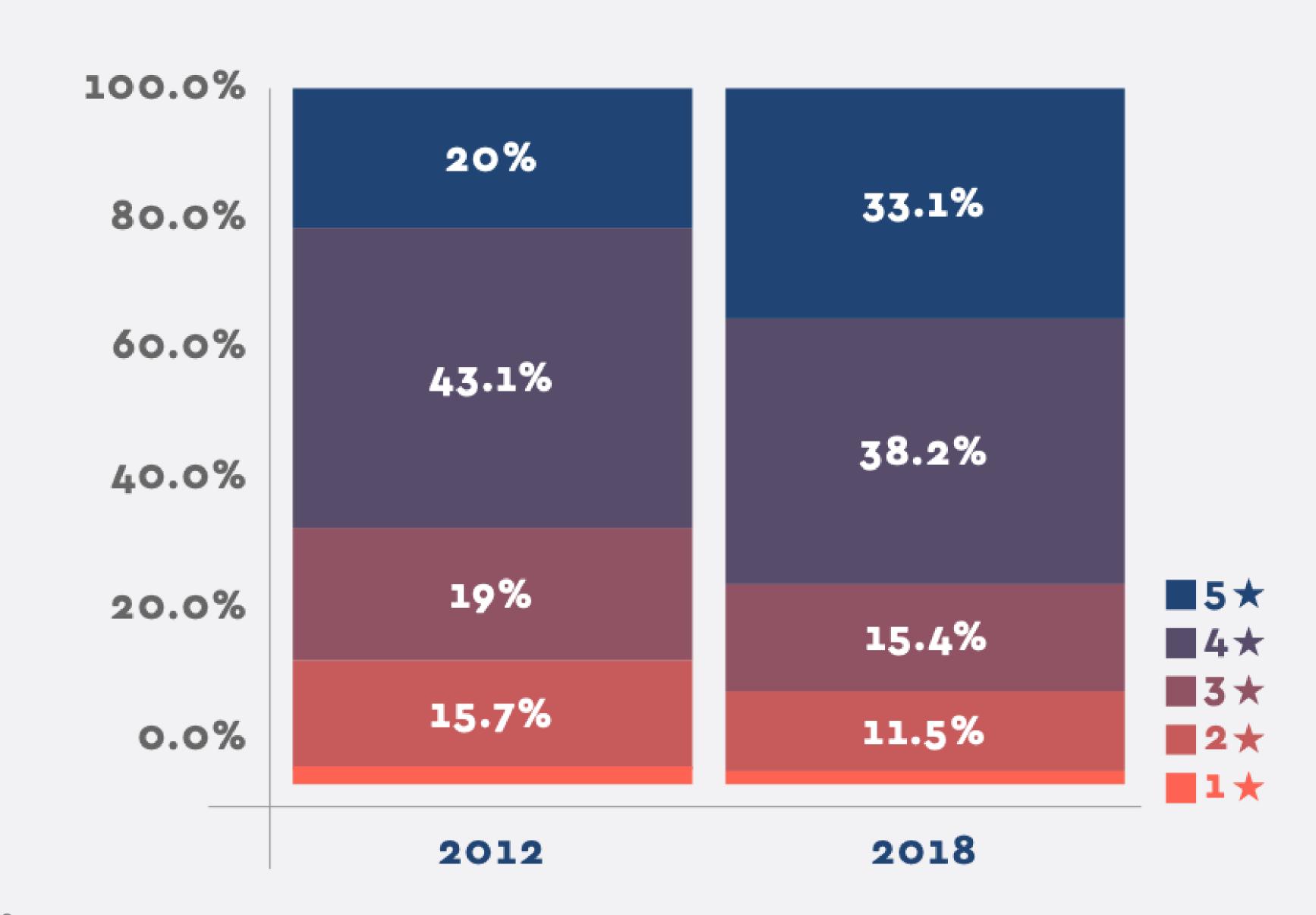
# C

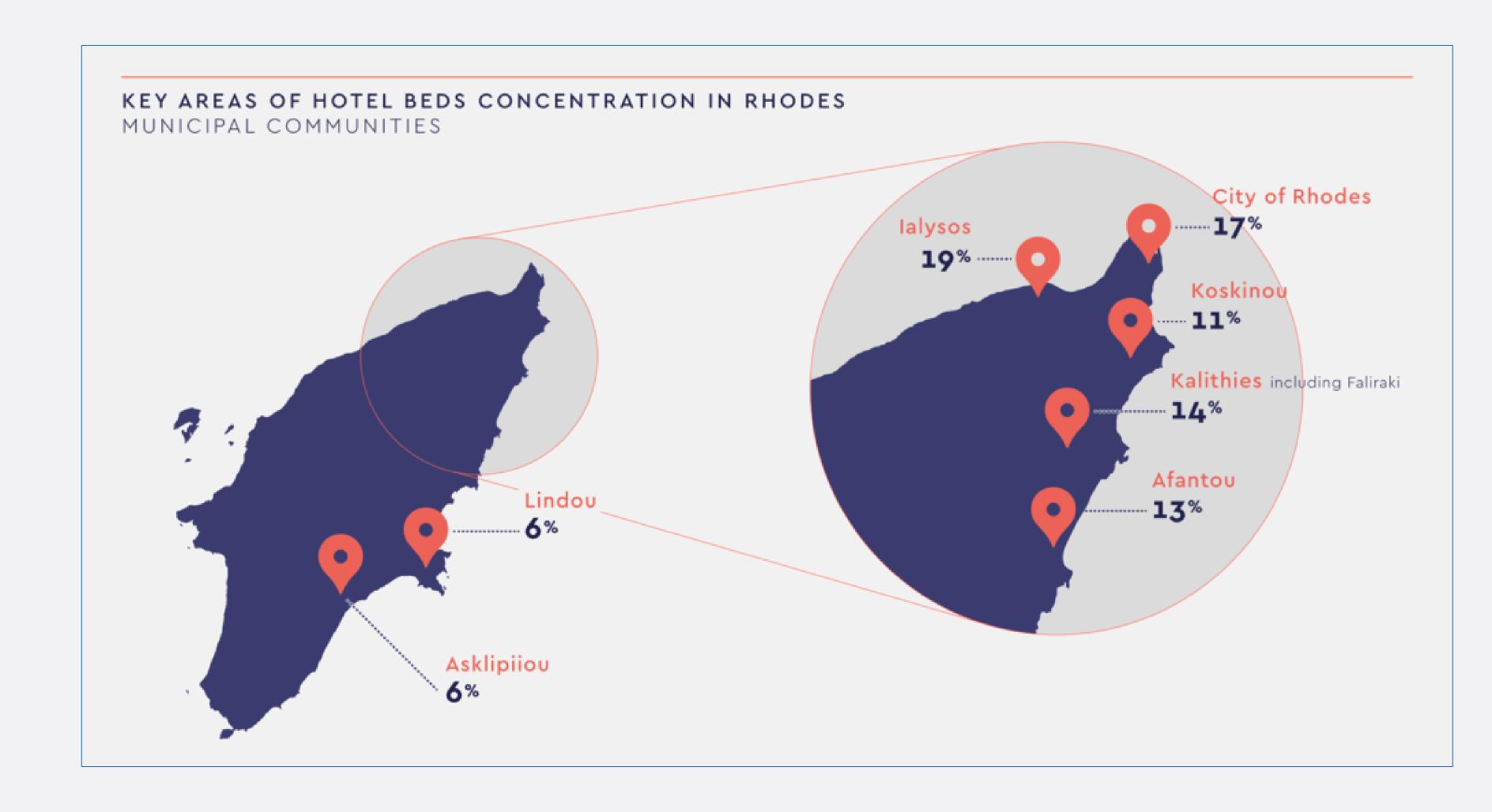RHODES DESTINATION MANAGEMENT PLANNING

## WHERE ARE WE NOW?

## Situation Analysis:
### HOTEL CAPACITY EVOLUTION
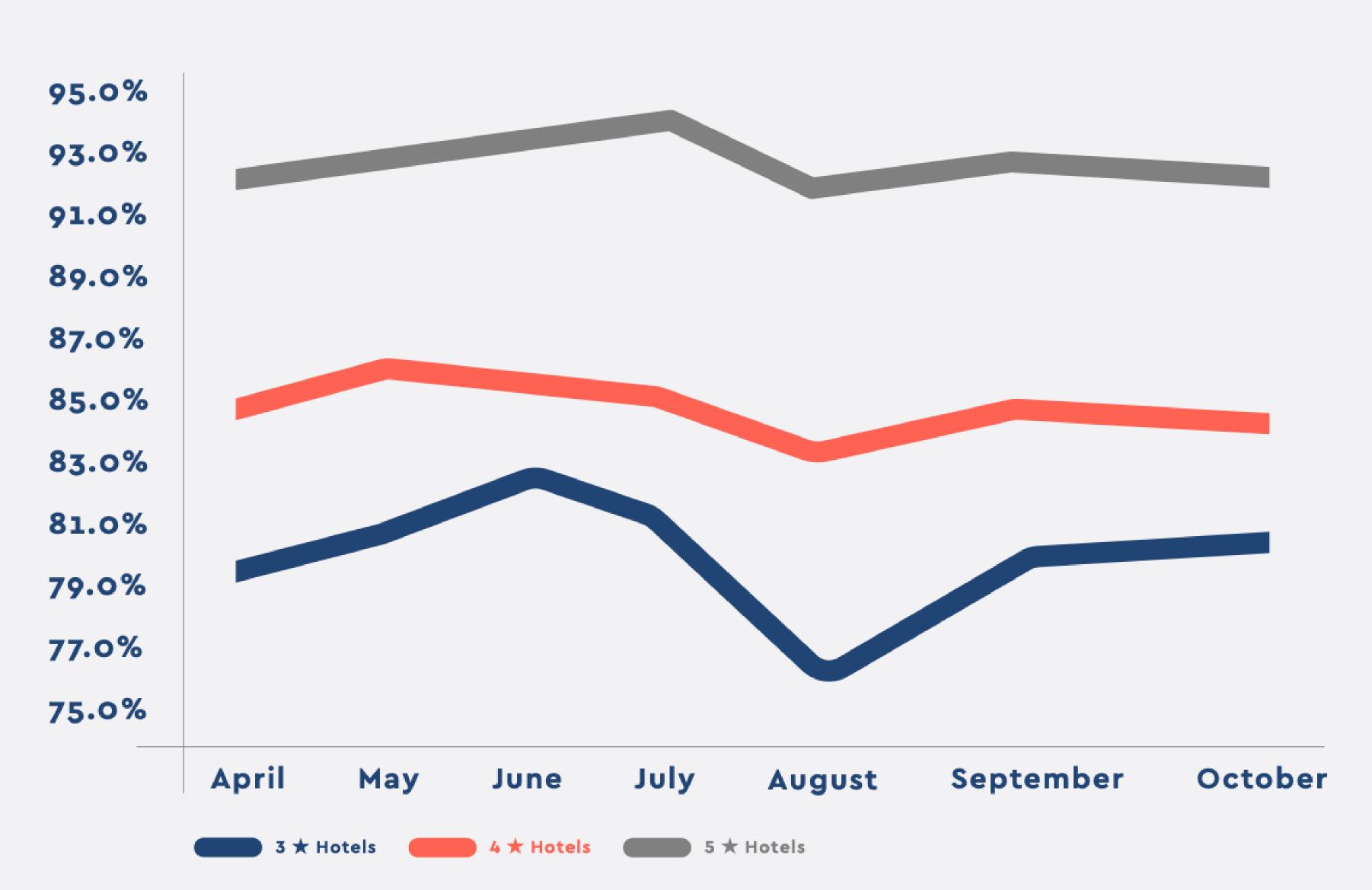
More than 2 in 3 hotel beds belong to 4* & 5* star hotels.



Legend:
- 5★
- 4★
- 3★
- 2★
- 1★

2012:
- 20%
- 43.1%
- 19%
- 15.7%

2018:
- 33.1%
- 38.2%
- 15.4%
- 11.5%

SOURCE: HELLENIC CHAMBER OF HOTELS

# Situation Analysis:
## HOTEL BEDS' CONCENTRATION IN MUNICIPAL COMMUNITIES



**KEY AREAS OF HOTEL BEDS CONCENTRATION IN RHODES**
MUNICIPAL COMMUNITIES

City of Rhodes **17%**

Ialysos **19%**

Koskinou **11%**

Kalithies including Faliraki **14%**

Afantou **13%**

Lindou **6%**

Asklipiiou **6%**

SOURCE: HELLENIC CHAMBER OF HOTELS
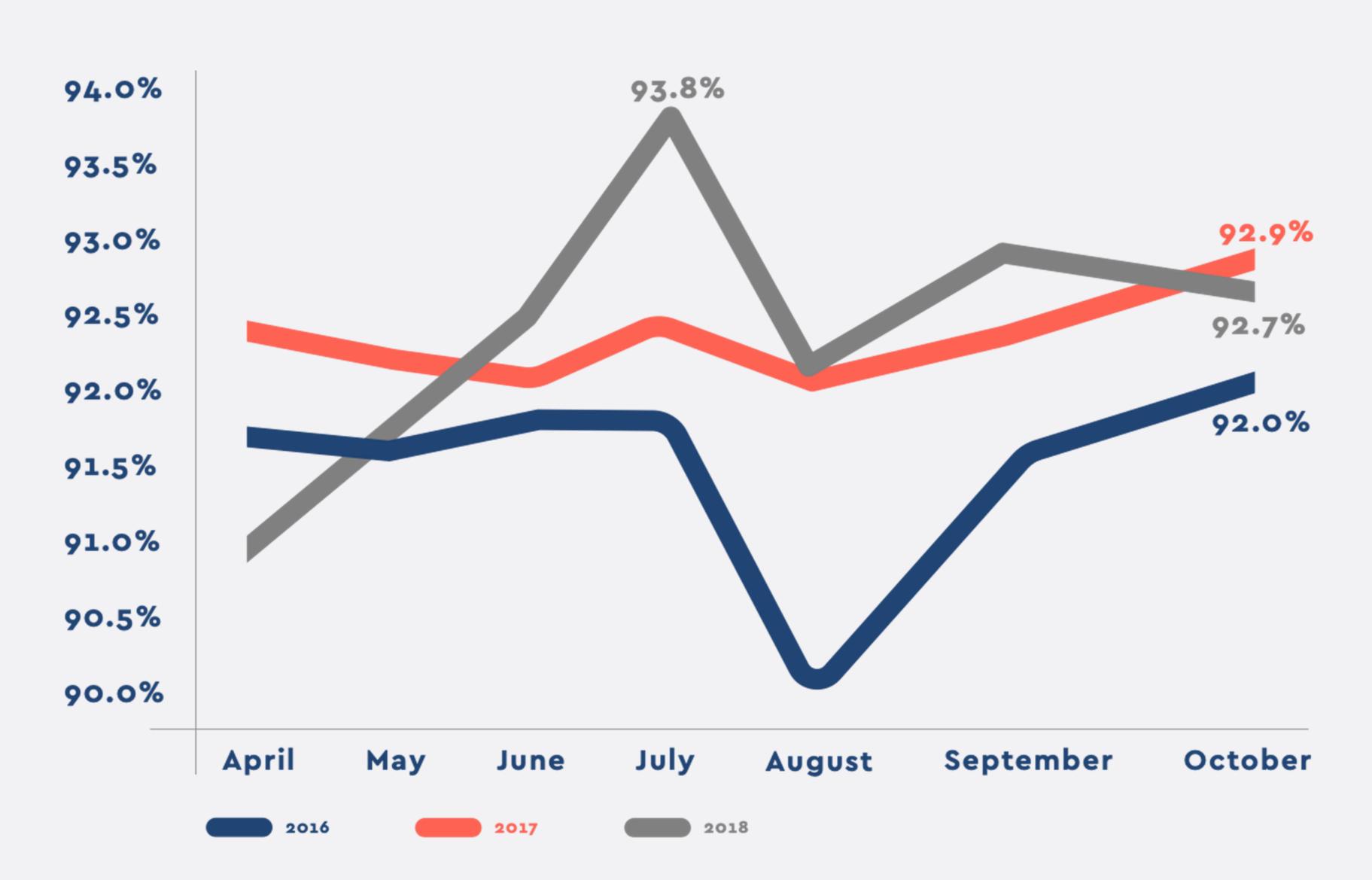
**Situation Analysis:**
GRI SCORES FOR
3*, 4* & 5* HOTELS
IN RHODES (2018)

Average scores higher
than 80% in all cases.



95.0%
93.0%
91.0%
89.0%
87.0%
85.0%
83.0%
81.0%
79.0%
77.0%
75.0%

April    May    June    July    August    September    October

■ 3 ★ Hotels    ■ 4 ★ Hotels    ■ 5 ★ Hotels

SOURCE: REVIEW PRO DATA BY SETE INTELLIGENCE (INSETE)
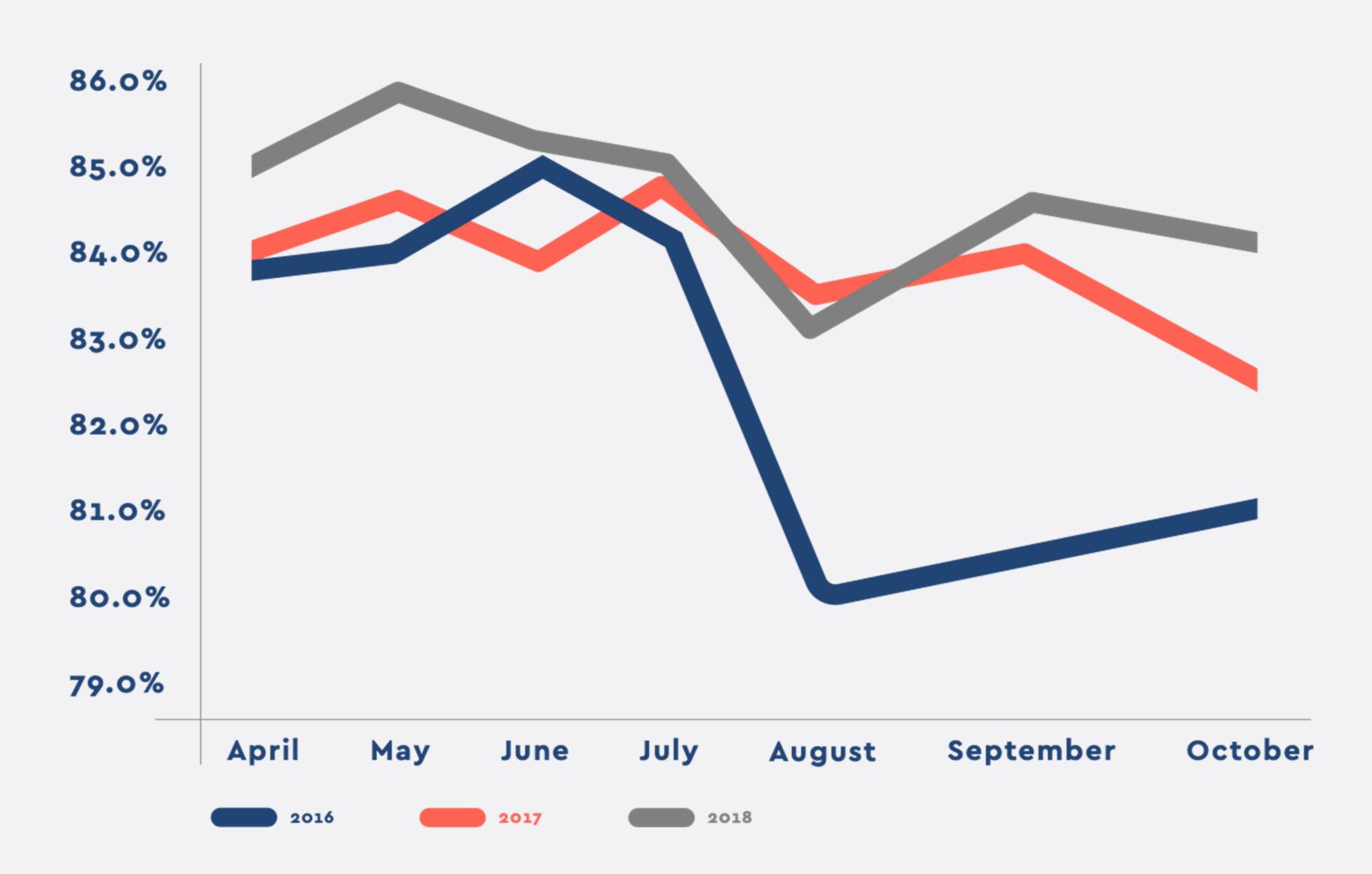
## Situation Analysis:
### GRI SCORES FOR 5* HOTELS IN RHODES (2016-2018)

October, a particularly satisfactory month for visitors.



**93.8%**

**92.9%**

**92.7%**

**92.0%**

| 94.0% |
| 93.5% |
| 93.0% |
| 92.5% |
| 92.0% |
| 91.5% |
| 91.0% |
| 90.5% |
| 90.0% |

April   May   June   July   August   September   October

■ 2016   ■ 2017   ■ 2018
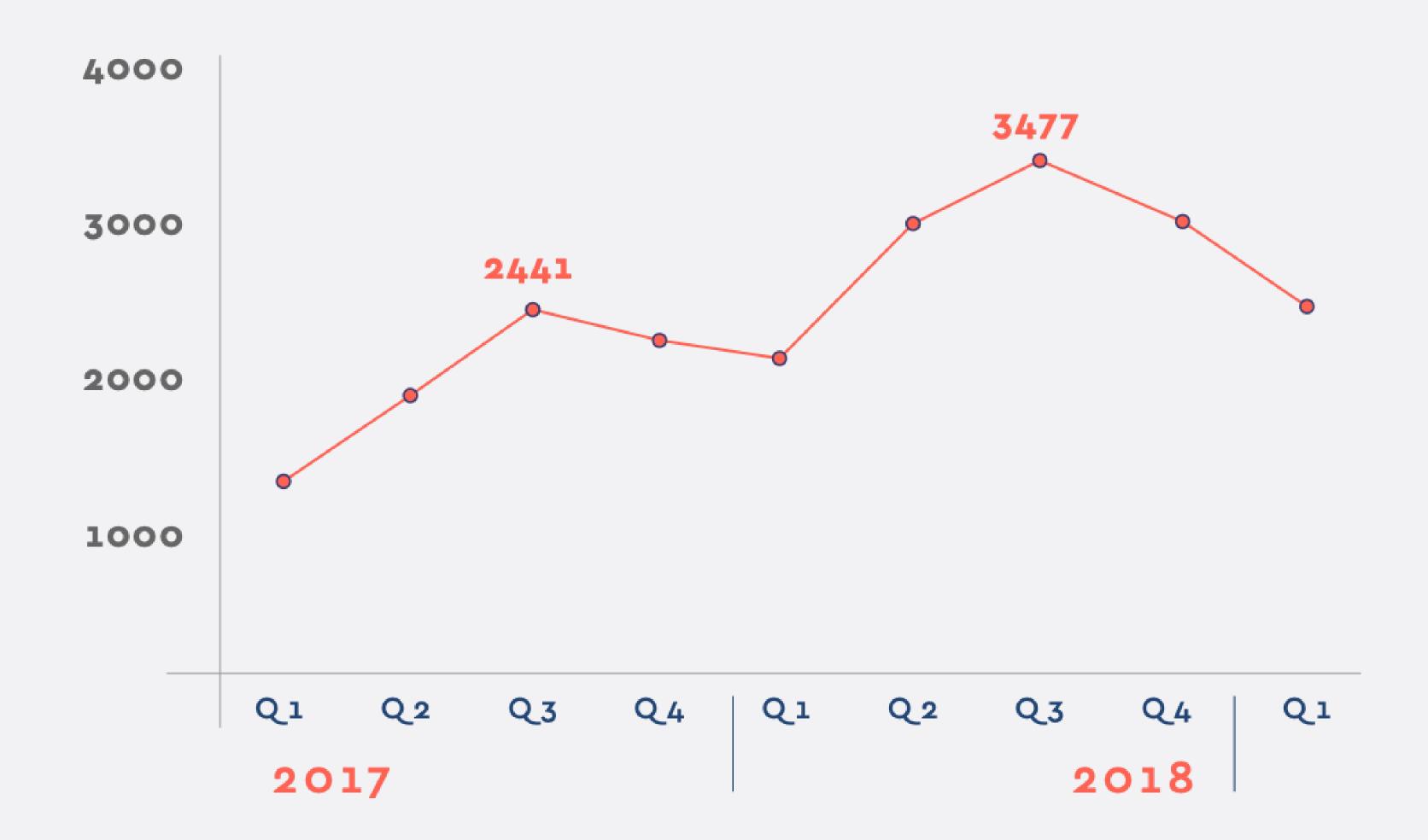
## Situation Analysis:
### GRI SCORES FOR 4*
### HOTELS IN RHODES
### (2016-2018)

The second part of the
season has regularly
lower scores than the
first part



April    May    June    July    August    September    October

2016     2017     2018

SOURCE: REVIEW PRO DATA BY SETE INTELLIGENCE (INSETE)

## Situation Analysis:
### SHORT-TERM RENTALS

In Q3 2018 there were 1,000+ additional listings compared to Q3 2017
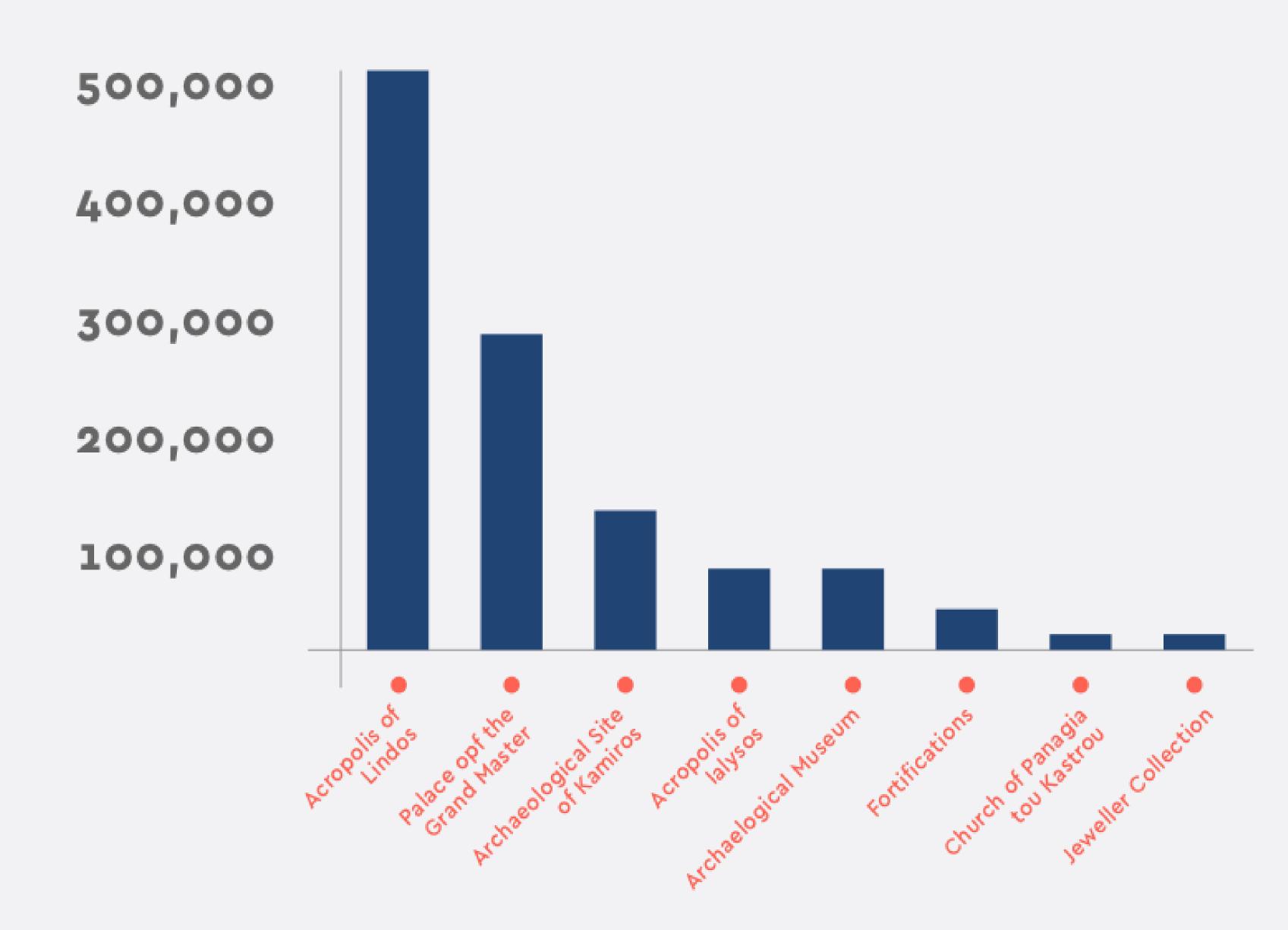


SOURCE: AIRDNA
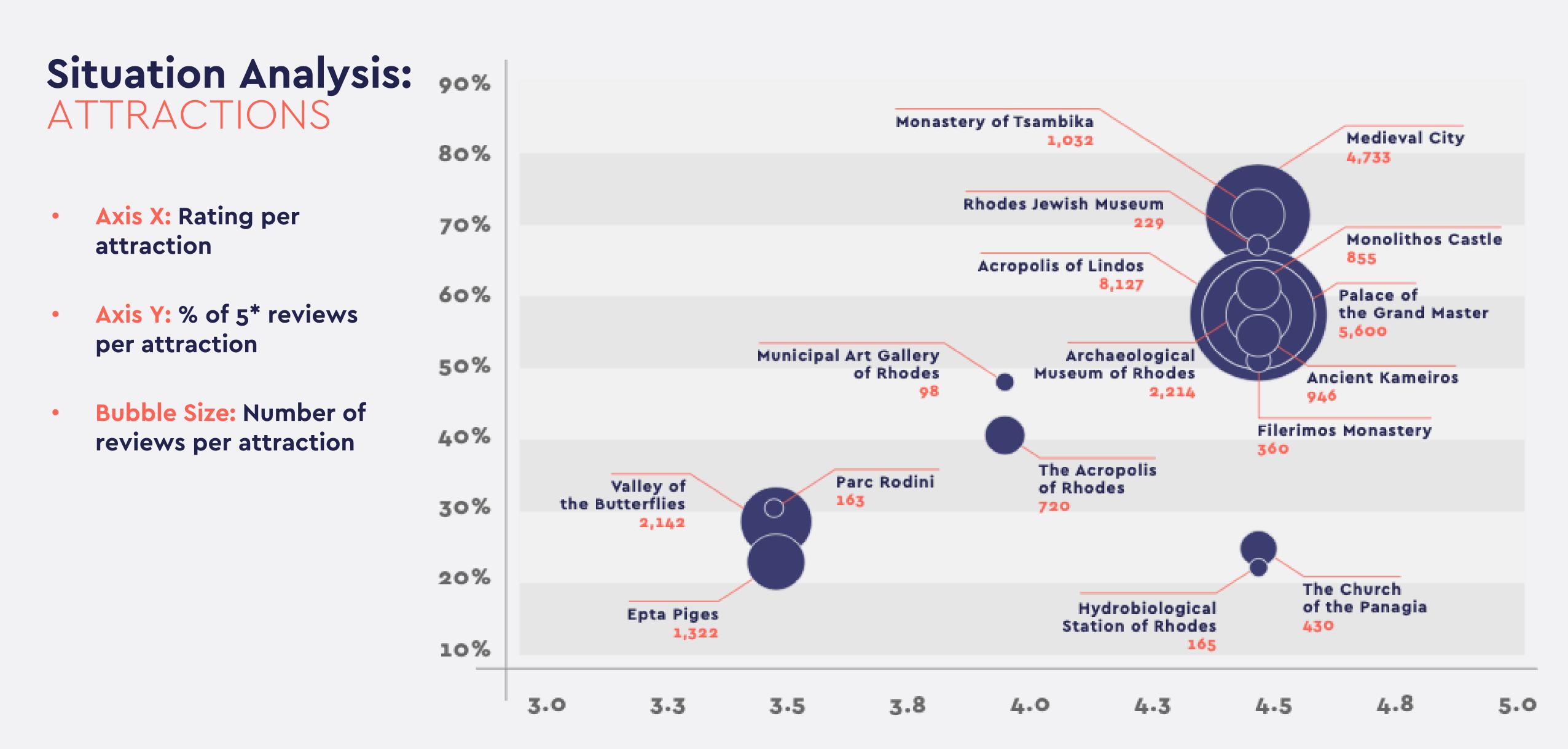
# Situation Analysis:
## CONFERENCE & MEETING VENUES

| Capacity | Number of venues | Percentage | Venue Type | Number of venues | Percentage |
|---|---|---|---|---|---|
| Small <100 people | 3 | 10% | 4* | 9 | 30% |
| Medium <250 people | 7 | 23% | 5* | 20 | 67% |
| Large 250-999 people | 12 | 40% | Other | 1 | 3% |
| XL 1000 people or more | 4 | 13% | | | |
| *Unknown* | 4 | 14% | | | |
| Total | 30 | 100% | Total | 30 | 100% |

SOURCES: Online desk research of aggregator sites (MEETINGPACKAGE.COM AND HELLENIC SUN EDITIONS, LISTING THE MAIN CONGRESS / CONFERENCE ENTERPRISES IN GREECE), complemented by venue data deriving from Google searches ('CONFERENCES AND MEETINGS RHODES').
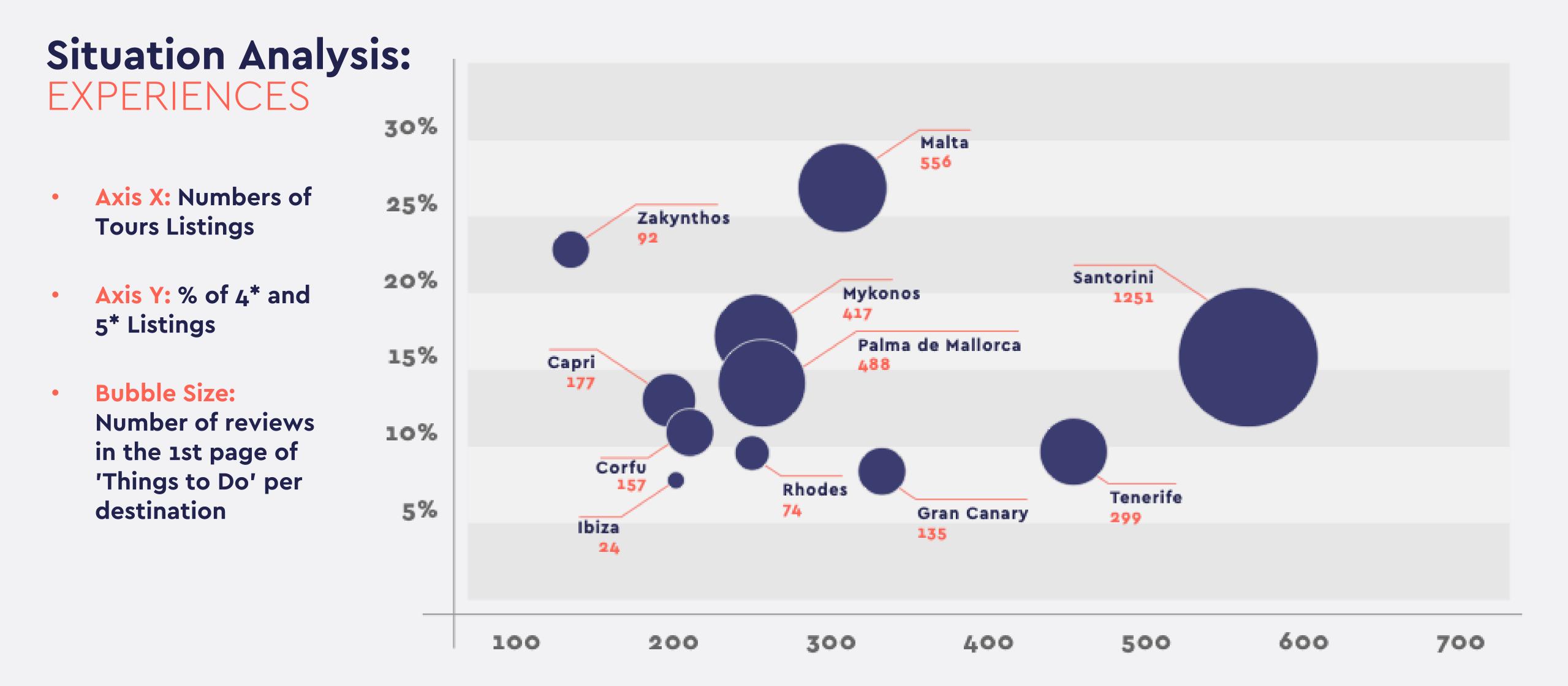
## Situation Analysis:
## ATTRACTIONS

Admissions at
Archaeological Sites
and Museums in
Rhodes, 2018



500,000

400,000

300,000

200,000

100,000

Acropolis of Lindos

Palace opf the Grand Master

Archaeological Site of Kamiros

Acropolis of Ialysos

Archaelogical Museum

Fortifications

Church of Panagia tou Kastrou

Jeweller Collection

SOURCE: HELLENIC STATISTICS SERVICE

## Situation Analysis:
### ATTRACTIONS

- **Axis X:** Rating per attraction

- **Axis Y:** % of 5* reviews per attraction

- **Bubble Size:** Number of reviews per attraction

Monastery of Tsambika
1,032

Medieval City
4,733

Rhodes Jewish Museum
229

Monolithos Castle
855

Acropolis of Lindos
8,127

Palace of the Grand Master
5,600

Municipal Art Gallery of Rhodes
98

Archaeological Museum of Rhodes
2,214

Ancient Kameiros
946

The Acropolis of Rhodes
720

Filerimos Monastery
360

Valley of the Butterflies
2,142

Parc Rodini
163

Epta Piges
1,322

Hydrobiological Station of Rhodes
165

The Church of the Panagia
430

# Situation Analysis:
## EXPERIENCES

- **Axis X:** Numbers of Tours Listings

- **Axis Y:** % of 4* and 5* Listings

- **Bubble Size:** Number of reviews in the 1st page of 'Things to Do' per destination



Malta
556

Zakynthos
92

Santorini
1251

Mykonos
417

Palma de Mallorca
488

Capri
177

Corfu
157

Ibiza
24

Rhodes
74

Gran Canary
135

Tenerife
299

## Situation Analysis:
### KEY PRODUCTS & SPECIAL PPRODUCTS UNDER THE DOMINANT PRODUCT OF SUN AND SEA



Senior / Elderly

Nighlife Youth

City Break

Cultural

Luxury

Sun & Sea

Rhodes

Yachting

Family

MICE

Cruises

# Situation Analysis:
## DESTINATION PERFORMANCE:

Growth of International
Air Arrivals in Top
Greek Destinations
(2012-2018)

**+153.3%**

**+45.5%**

| | |
|---|---|
| 200% | |
| 150% | |
| 100% | |
| 50% | |
| 0% | |

Mykonos  Santorini  Athens  Corfu  Thessaloniki  Chania  Heraklion  Kos  Rhodes

SOURCE: SETE INTELLIGENCE

# Situation Analysis:
## DESTINATION PERFORMANCE: 3.3 MILLION ARRIVALS IN 2018

### By air: 2,749,000

- International arrivals: 2,338,000
- Domestic arrivals: 411,000

### By sea: 558,000

- General – ferry/non-cruise: 320,000;
- Cruise: 238,000.

# Situation Analysis:
## ACCOMMODATION

| Capacity | Domestic Visitors | | | International Visitors | | |
|---|---|---|---|---|---|---|
| | 2017 | 2018 | Δ(%) | 2017 | 2018 | Δ(%) |
| Hotel Arrivals | 111,000 | 109,000 | -2% | 1.75m | 1.84m | +5% |
| Hotel Overnights | 417,000 | 385,000 | -7.5% | 11.42m | 11.84m | +3.5% |
| Average Length of Stay | 3.8 Nights | 3.5 Nights | - | 6.5 Nights | 6.4 Nights | - |
| Hotel Occupancy | Increased from 60% in 2012 to 68% in 2017 and settled down at 67% in 2018 | | | | | |

SOURCE: HELLENIC STATISTICS SERVICE
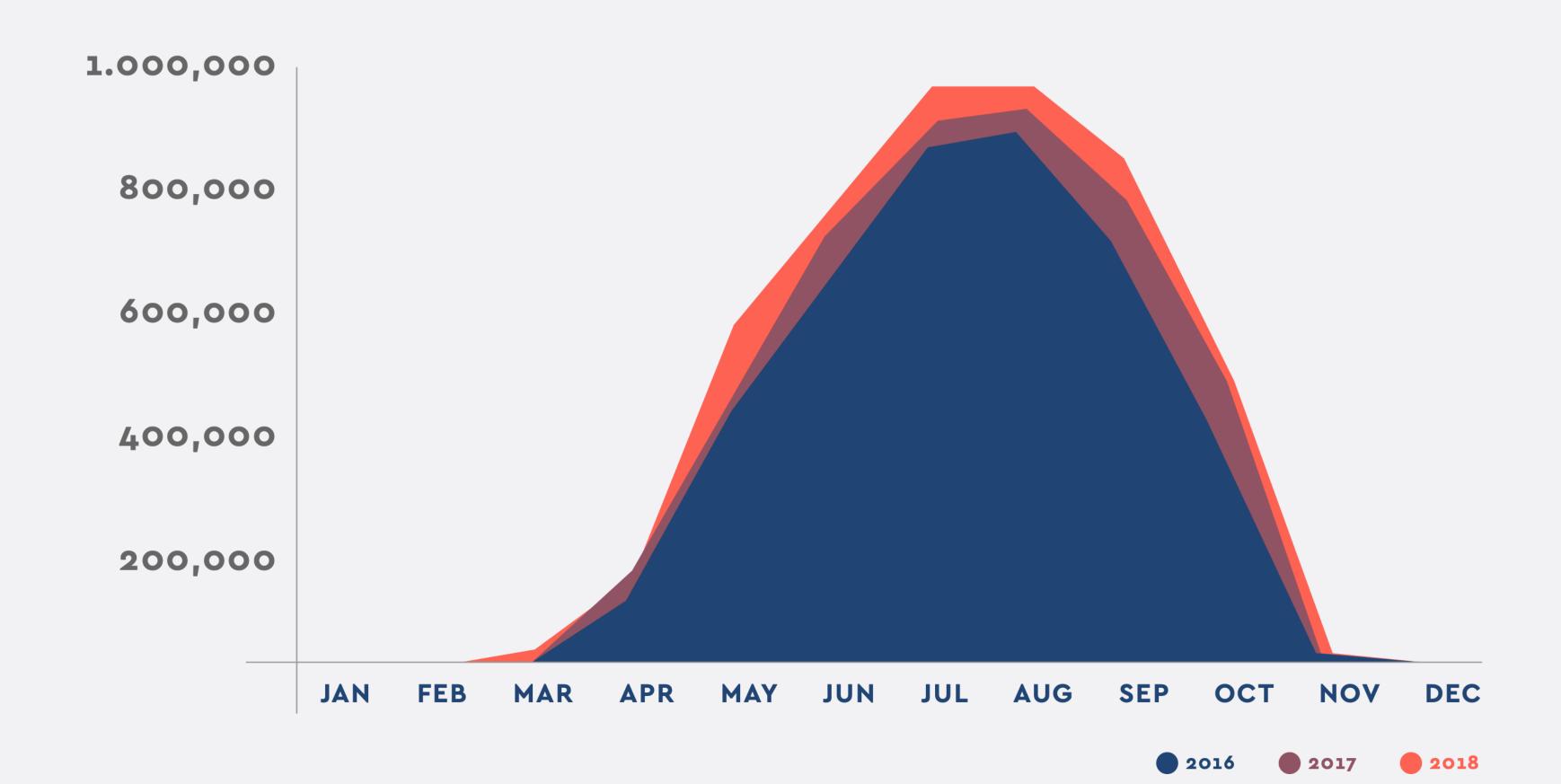
# Situation Analysis:
## GROWTH OF HOTEL BEDS / ARRIVALS / OVERNIGHTS

| YEAR-OVER-YEAR GROWTH (%) | HOTEL BEDS | HOTEL ARRIVALS | HOTEL OVERNIGHTS |
|---|---|---|---|
| 2016/2015 | -2% | +12% | +8% |
| 2017/2016 | +4.5% | +3.7% | +8.8% |
| 2018/2017 | +8.7% | +4.7% | +3.2 |
| 2019/2018 | +1.5% | - | - |

SOURCE: HELLENIC STATISTICS SERVICE

# Situation Analysis:
## SEASONALITY

International Air
Arrivals (Monthly) at
Rhodes Airport (2016-
2018)



SOURCE: FRAPORT GREECE

● 2016  ● 2017  ● 2018
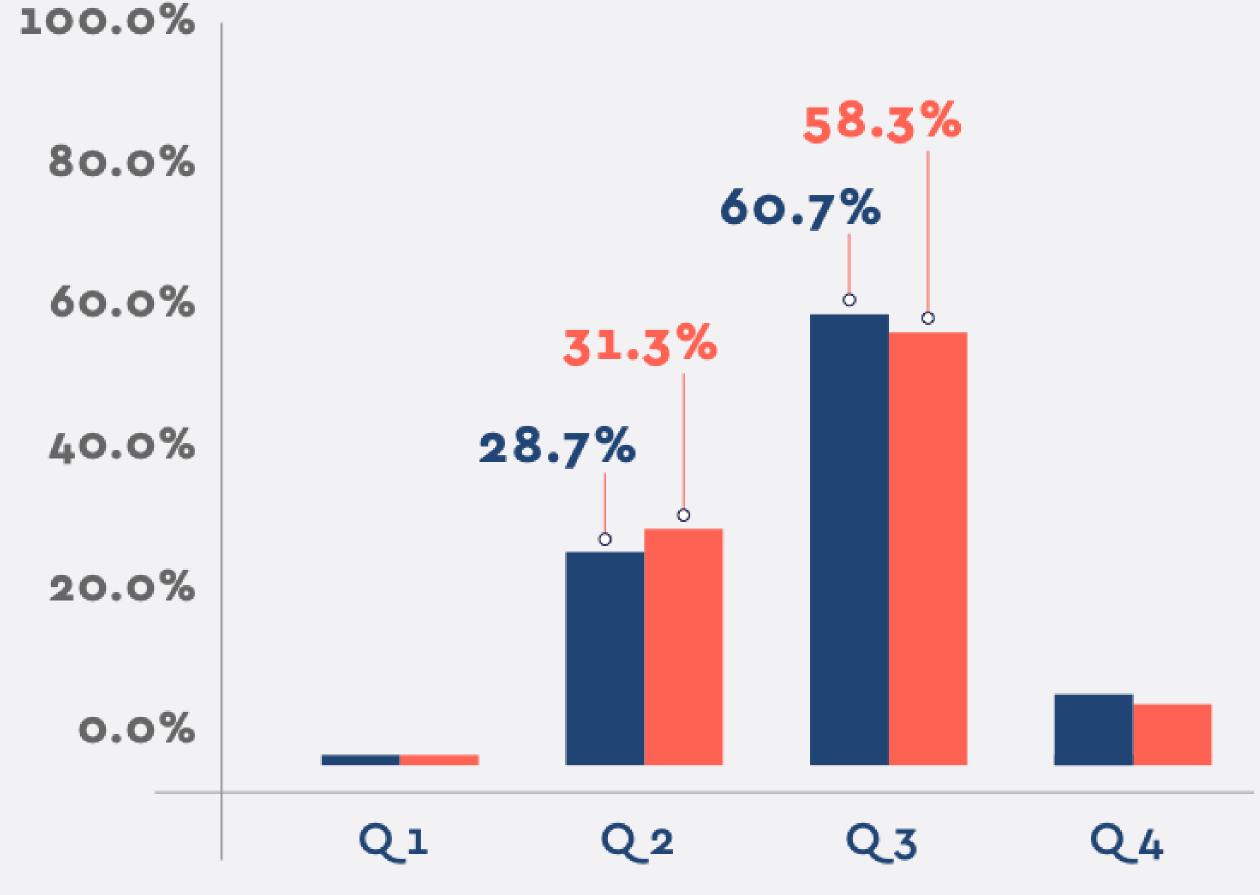
# Situation Analysis:
## SEASONALITY
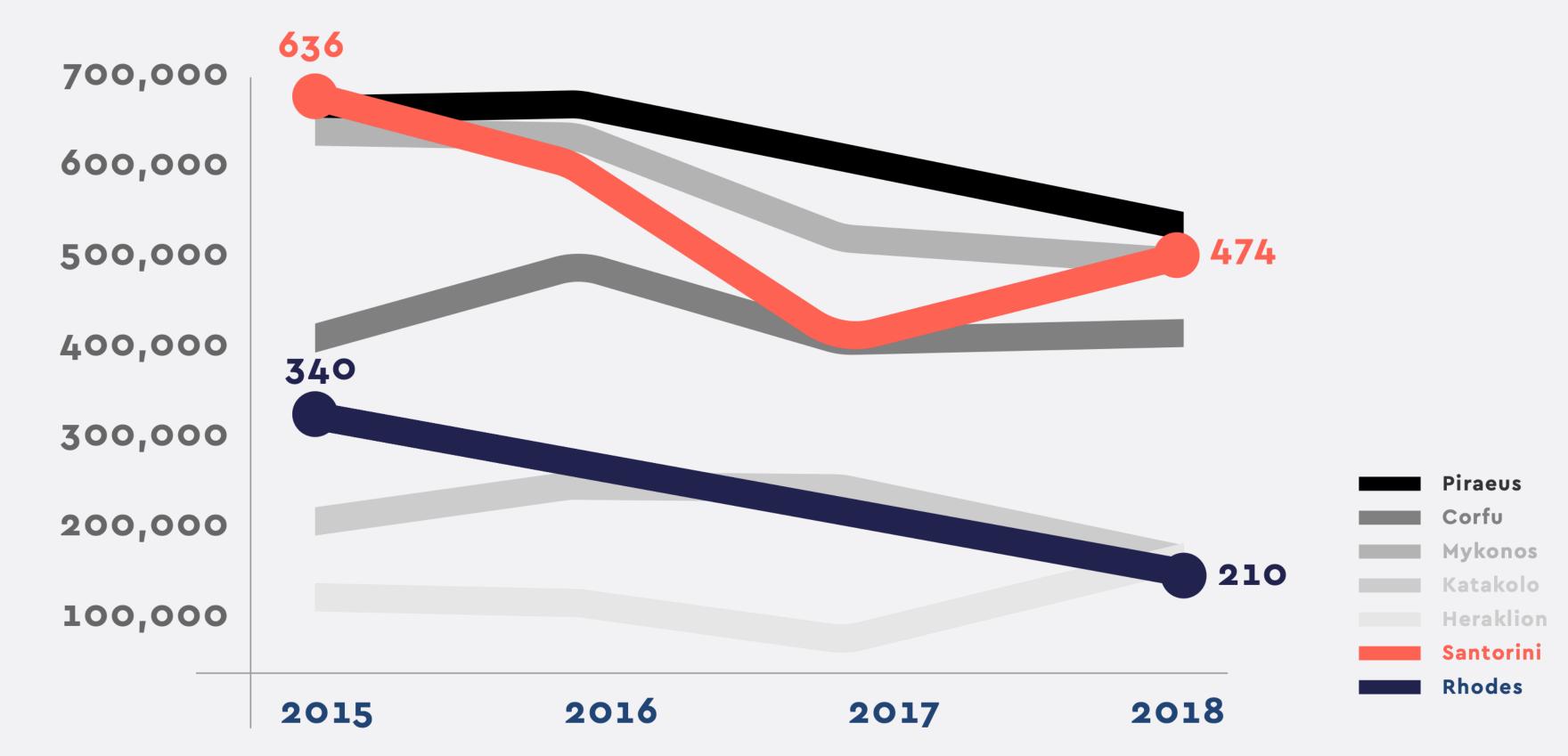
Shares of International
Air Arrivals per Quarter
at Rhodes Airport
(2016-2018)



100.0%

80.0%

60.0%

**58.3%**

**60.7%**

40.0%

**31.3%**

**28.7%**

20.0%

0.0%

Q1      Q2      Q3      Q4

● 2016      ● 2018
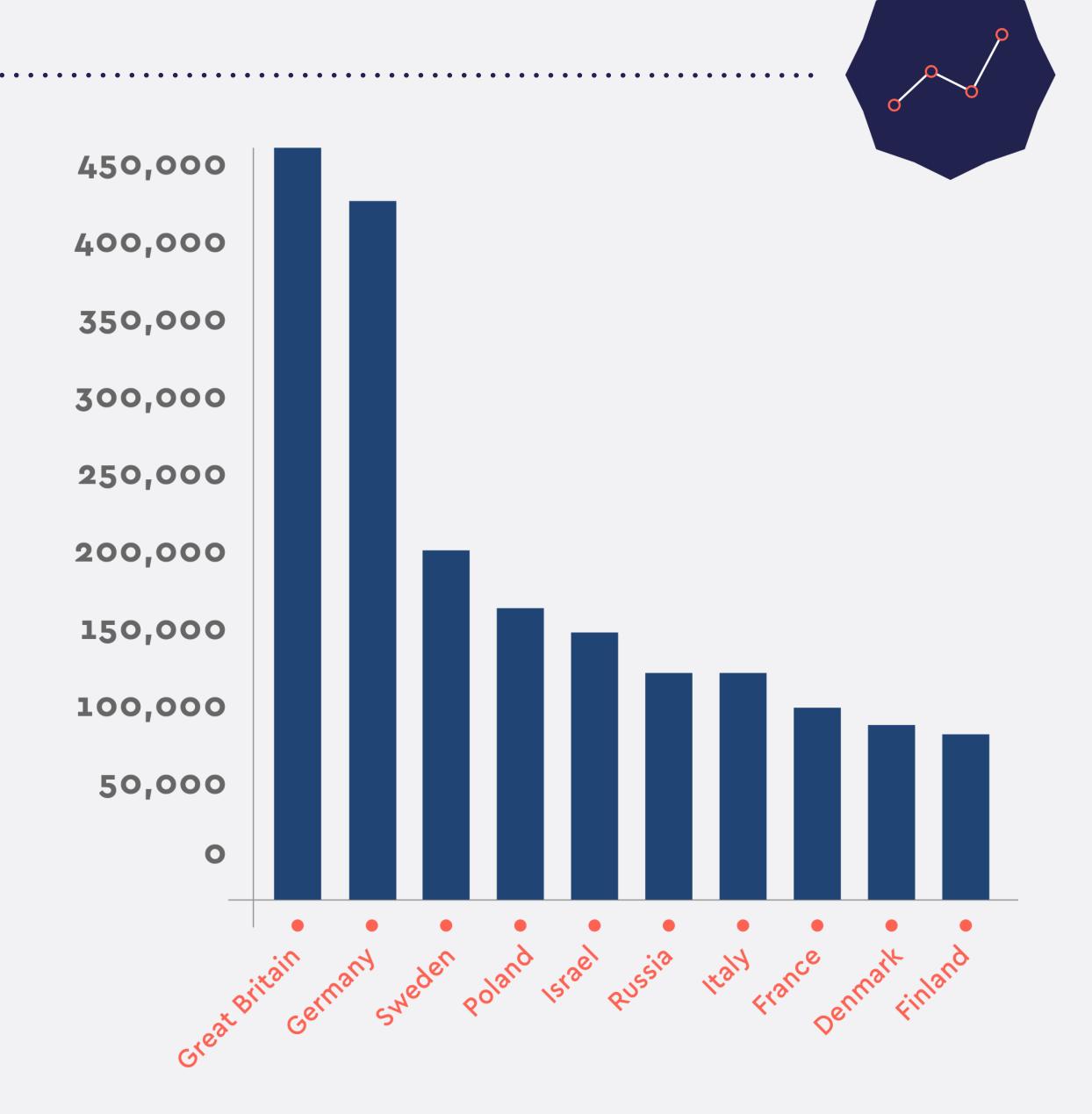
# Situation Analysis:
## CRUISE SHIP VISITS
## IN GREECE (2015-2018)



700,000

636

600,000

500,000

474

400,000

340

300,000

210

200,000

100,000

2015    2016    2017    2018

Piraeus
Corfu
Mykonos
Katakolo
Heraklion
Santorini
Rhodes

SOURCE: HELLENIC PORTS ASSOCIATION

# Situation Analysis:
## MARKETS

International Arrivals at
Rhodes International
Airport (2018)



SOURCE: FRAPORT GREECE

# Organisations Involved in the Policy Workshop

✓ Chamber of Dodecanese

✓ Municipality of Rhodes – Directorates of Tourism and Culture

✓ Municipal Port Fund of South Dodecanese

✓ Region of South Aegean - Directorates of Tourism, Sports and Lifelong Learning

✓ Rhodes KTEL S.A.

✓ Association of Taxi Owners

✓ Rhodes Hoteliers Association

✓ Rhodes Hotel Managers Association

✓ Association of Travel Agents

✓ Rhodes KTEL S.A.

✓ Rhodes Traders Association

✓ University of Aegean

✓ Rhodes Institute of Vocational Training

# Key Issues Discussed in the Policy Workshop

**1**

**Primary challenges**

**2**

**Geographic markets & lifestyle segments with high potential**

**3**

**Main competitors**

**4**

**Most important destination values / attractions**

**5**

**Priorities for destination management**

# Examples of Expert Interviews
## ORGANISATIONS

- ✓ Municipality of Rhodes
- ✓ Region of South Aegean
- ✓ Rhodes Hoteliers Association
- ✓ Rhodes Hotel Managers Association

- ✓ Association of Travel Agents
- ✓ Rhodes KTEL S.A.
- ✓ Rhodes Traders Association
- ✓ Dodecanese Directorate under the Greek National Tourism Organization

- ✓ Church Committee Tsampika Monastery
- ✓ Olive Oil Factory and Folklore Museum
- ✓ Monolithos Community Association
- ✓ University of the Aegean

# Local Surveys via SurveyMonkey

## end of June – middle of August

**85**

**Local Businesses**

**137**

**Members of
Local Communities**

# Attitude towards Tourism Development

## Local Community Members

### 86.5%

are proud to see tourists who have come from far away to visit Rhodes

### 61%

agree that positive impacts of tourism outweigh the negative impacts

### 89.5%

would like to see tourists in Rhodes all year round

## Local Businesses

### 68%

close during the winter

### of which 93%

would be interested in extending period of opening, if there was sufficient business.

### 3 in 10

Local businesses and members of local communities believe that the growth of short-term rentals has been positive for local communities

# Most Important Challenges in Relation to Tourism Development

## Local Community Members

| | |
|---|---|
| Insufficient car parking | 77% |
| Lack of cleanliness | 61% |
| Traffic congestion | 58% |
| Water efficiency issues | 49% |
| Uncontrolled sprawl | 44% |
| Waste management issues | 41% |

## Local Businesses

| | |
|---|---|
| Insufficient car parking | 66% |
| Traffic congestion | 62% |
| Water efficiency issues | 55% |
| Lack of cleanliness | 48% |
| Waste management issues | 45% |
| Crowd congestion in specific places / time periods | 40% |

# Most Important Challenges in Relation to Tourism Development

## Local Community Members

**Also, there were comments about** the current situation in the Medieval City (illegal guides, street beggars, lack of authenticity), negative effect of all-inclusive packages, lack of infrastructure and lack of law enforcement

## Businesses and Local Community Members

**Also, there were comments about** the lack of conservation for abandoned buildings, traffic, lack of waste management bins and behavior of travelers

# Surveys of Recent Visitors via Pollfish

end of June – July



400

Germany

400

United Kingdom

# Key Words to Describe the Destination

## Germany

**400**

| | |
|---|---|
| Cultural / historical / educational | 54% |
| Astonishing landscape | 48% |
| Exciting / lots to do | 38% |
| Romantic | 36% |
| Welcoming / friendly people | 32% |
| Affordable | 32% |
| Different / unique / undiscovered | 30% |
| Touristic | 20% |

## United Kingdom

**400**

| | |
|---|---|
| Astonishing landscape | 57% |
| Cultural / historical / educational | 55% |
| Romantic | 33% |
| Affordable | 31% |
| Welcoming / friendly people | 30% |
| Different / unique / undiscovered | 28% |
| Exciting / lots to do | 28% |
| Traditional | 22% |
| Touristic | 22% |

# Visitor Attitudes

## 🇩🇪 Germany — 400

| | |
|---|---|
| **Very satisfied with their experience** | **54%** |
| **Satisfied with their experience** | **37%** |
| **Wish to return for another holiday in the next five years** | **79%** |
| **Would recommend the destination to others** | **90%** |

## 🇬🇧 United Kingdom — 400

| | |
|---|---|
| **Very satisfied with their experience** | **47%** |
| **Satisfied with their experience** | **44%** |
| **Wish to return for another holiday in the next five years** | **85%** |
| **Would recommend the destination to others** | **94%** |

# Situation Analysis:
## MARKETS

## ⊙ Reason for Visit

- Sense of a sun & sea paradise
- Natural beauty
- History and culture

## ✓ Main Likes

- Quality of food & drink
- Quality of tours / activities / excursions
- Variety of tours / activities / excursions

## ✗ Least Satisfying Aspects

- Quality of airport services
- Poor value for money
- Limited tourist information
- Limited parking facilities

# Challenges:
## IMAGE & BUSINESS DEVELOPMENT

### ⊘ Dependence on Tour Operators

- Limited opportunities for new product development in the main season, create an over-reliance on price, rather than experience-driven sales.

### ⊘ Business Diversification:

- Need to develop new products / experiences to diversify market base, attract new higher-spending markets

### ⊘ All-inclusive Accommodation

- Need to work with hotels so as to offer to guests more experiential tours and activities along with opportunities for interaction with local communities.

# Challenges:
## EXTENDING THE SEASON

### ⊙ Greatest Growth Potential

- Gastronomy tourism
- Cultural tourism
- Outdoor activities,
- Conferences and conventions.

### ⊙ Concerted Effort Required

- Hotels, airlines, restaurants, shops, etc, need to work to a common plan.

### ⊙ Weaknesses to Address

- Lack of willingness to innovate in building off-season packages
- Lack of direct air services from best prospect markets (e.g. northern Europe) outside main season

**Challenges:**
POLITICAL, LEGAL
AND SOCIAL

⊙ Law Enforcement

⊙ Unlicensed Operators
across Rhodes's Beaches

⊙ Uncontrolled Sprawl

# **Challenges:**
## VISIDOR EXPERIENCE

⊙ Signage

⊙ 'Sense of Place'

- Illegal and misleading signage

- Unclear signage at key locations

- Limited local produce / crafts

- Limited interpretation of local culture e.g. lifestyle, heritage, architecture, geology

- Public realm: few iconic monuments / statues / public art, which reflect local 'sense of place'

# Challenges:
## VISITOR EXPERIENCE

### Interpretation

- Poor interpretation at many historic sites

### Untold Stories

- Stories that might reinforce Rhodes' character are not well told or particularly evident

### Revival of Heritage

- Implementation of smart techniques into future into scheduled and future improvement projects for natural and cultural heritage attractions

## Challenges:
## DISSATISFACTION

Dissatisfaction

with way tourism is developing in Rhodes

**Businesses**

74%

**Communities**

73%

# Challenges:
## FUTURE PRIORITIES

**Consensus** among businesses and communities on:

- Improve infrastructure

- Improve the seasonal distribution of visitors

- Improve preservation of natural heritage

- Improve heritage interpretation

- Improve the provision of information to tourists

- Engage local communities and companies in destination management planning

- Establish a mechanism to measure and monitor tourism

# Strategic Challenges:

**1** The relatively monolithic image of Rhodes as a summer beach destination

**2** Conservation and sustainability of Rhodes' exceptional built and natural environment and its cultural heritage

**3** The quality of visitor experience

**4** Extending the season

**5** Extending the footprint

**D**

RHODES DESTINATION MANAGEMENT PLANNING

# WHERE DO WE WANT TO BE IN 10 YEARS?

Aim, Vision and Objectives

# Strategic Aim and Vision

## STRATEGIC AIM

*"To optimise economic benefit to Rhodes through the development of tourism, in a way that is economically, socio-culturally and environmentally sustainable and valued by residents".*

## VISION FOR RHODES BY 2030

*"An all-year-round sustainable destination of choice, through the creation and promotion of exceptional visitor experiences, designed for markets that are interested in exploring the island as a whole for its heritage, culture and outdoor activities, across all four seasons of the year; and which will bring optimum benefits for the people of Rhodes".*

# Strategic Focus

⚠ Seasonal extension:

c. 60%

⚠ Increase main season visitor value, through attracting new markets:

c. 25%

⚠ Visitor management in peak season:

c. 15%

# High-Level Objectives
## to be achieved by 2030

**1** **Extend the tourism season** and ensure that 75% of the tourism capacity is open for at least 10 months of the year, with average room occupancy for open months of 70%; and that 50% of tourism-related jobs are available all-year round.

**2** Increase the **average daily spending** of visitors by 30%

**3** Stimulate the **growth of 50 new tourism businesses or community enterprises** offering new visitor experiences

**4** Establish one **Signature Route** each for seven years.

**5** Establish a **year-round programme of events** designed to attract the DMP's target segments

**E**

RHODES DESTINATION MANAGEMENT PLANNING

# HOW DO WE GET THERE?
Strategy and Action Plan

# Strategic Approach

Identify **best prospect visitors**, who will:

- **provide most value**

- **contribute most to the destination's sustainability**

- **impose least on the destination's natural resources, built heritage, and residents' tolerance**

Develop products and experiences to **attract and satisfy visitors** who will contribute most and impact least.

Take steps to **minimise negative impacts**, particularly those caused by other types of visitors, who might contribute less in terms of value and sustainable behaviour.

Focus destination **marketing** on those preferred types of visitors.

# Strategic Priorities

— 6 STRATEGIC PRIORITIES

— 32 ACTION AREAS

— 114 RECOMMENDED ACTIONS

**1** **Rhodes for All Seasons**-
the "Flagship" initiative
4 Action Areas
15 recommended actions

**2** **Repositioning Rhodes**-
enhancing its image and
broadening its appeal
6 Action Areas
18 recommended actions

**3** **Creating Sustainable Rhodes**-
sustainable in terms of
environment/natural
resources, communities,
visitors, businesses
8 Action Areas
28 recommended actions

# Strategic Priorities

— 6 STRATEGIC PRIORITIES

— 32 ACTION AREAS

— 114 RECOMMENDED ACTIONS

**4** **Managing Visitors in the City**- maximizing visitor enjoyment and quality of life

4 Action Areas

13 recommended actions

**5** **Extending the Footprint**- spreading tourism benefits to business and communities across the island

5 Action Areas

20 recommended actions

**6** **Enhancing the Visitor Experience-** focusing on quality

5 Action Areas

20 recommended actions

# Strategic Priorities
## — PLUS

+ Crisis preparedness and
civil protection

4 Action Areas

13 recommended actions

+ Series of enabling programmes and actions, to support delivery of all priorities

6 Action Areas

29 recommended actions

## The Strategic Priorities and Beneficiaries in Rhodes

*The diagram shows the intended impact of the strategic priorities (the inner rings) on each of the four primary beneficiaries of the DMP (the quadrants).*

- 🟠 **SP1** - Rhodes for All Seasons
- 🔴 **SP2** - Repositioning Rhodes:
- 🟢 **SP3** - Creating Sustainable Rhodes
- ⚫ **SP4** - Managing Visitors in the City
- 🔵 **SP5** - Extending the Footprint
- 🟣 **SP6** - Enhancing the Visitor Experience

# Brand Image and Proposition

**1** Primary Brand Characteristics

- **Cultural Heritage**
- **Natural Environment,** hills, forests, sea
- **Beach/sun/sea +** history, outdoor activities

**2** Supporting Brand Characteristics

- **Main season:** history, outdoor activities
- **Off-season:** sun/maritime

**3** Emotional Take-out

- **Absorbing and invigorating**

Value Proposition:

**Familiar, yet undiscovered**

# Brand Narrative Themes



**1** Undiscovered Gems

**2** Landscape Variety

**3** Cultural Diversity

**4** Colossal Characters

**5** Active escape

**5** Sun and sea +

# Target Markets
## RATIONALE

☑ Value
Current and future potential value

volume x spend x repeat visit propensity

☑ Sustainability
Impact on the island's natural environment, physical infrastructure, resources, and community – e.g. propensity to:

- spread benefits around the island,

- visit outside the main season

- consume fewer scarce resources

- minimise congestion

- contribute towards heritage preservation and natural environment conservation

# Target Markets
## EXISTING SEGMENTS

### "Sun and sea/beach worshippers"

- Predominantly from northern/central/eastern Europe
- Their primary motivation for travel is relaxation in a warm climate.
- For couples and families, the availability of other attractions adds a secondary appeal
- For youth groups, vibrant nightlife is an important driver of destination choice.

### "Cruise visitors"

- Mostly 'empty-nester', older couples, plus some younger couples and groups of younger people, visiting several islands in the Aegean, whose time on any one island tends to be limited to day shore excursions of about five hours.

# Target Markets
## SEGMENT PRIORITIES

### "Culturally curious"
- From UK and Germany, followed by Netherlands and Sweden
- Generally older, empty-nester couples

### "Off-season short breakers"
- From UK and Germany, followed by Netherlands Poland, Israel and Russia
- Mostly couples, spanning a wide age range

### "MICE"
- From UK and Germany, followed by Sweden
- Primarily small conference and incentive visitors

### "Outdoor enthusiasts"
- From UK and Germany, followed by Netherlands and Sweden
- Younger couples and groups of friends

### "Special interest devotees"
- From UK and Germany, followed by Netherlands and Sweden
- Singles, couples and small groups of friends, spanning a wide age range

# Marketing Plan
## 4 GUIDING PRINCIPLES

### Sustainability
Focus on attracting visitors who will contribute most and impact least

### Cost-effectiveness
Need to achieve maximum impact with limited resources

### Targeted marketing
Marketing should not be spread too thinly and should focus on a limited range of the best prospects for Rhodes.

### Product-market fit
Focus on those who would most appreciate Rhodes's range of appeals and therefore be likely to stay longer and spend more.
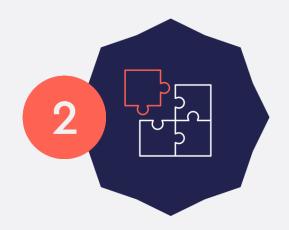
# Marketing Plan:

**Priority #1** "DEVELOP AND BUILD – OFF-SEASON"

1-2: development; years 2-5 marketing

**Priority #2** "MAXIMISE VALUE"

Years 1-5 ongoing
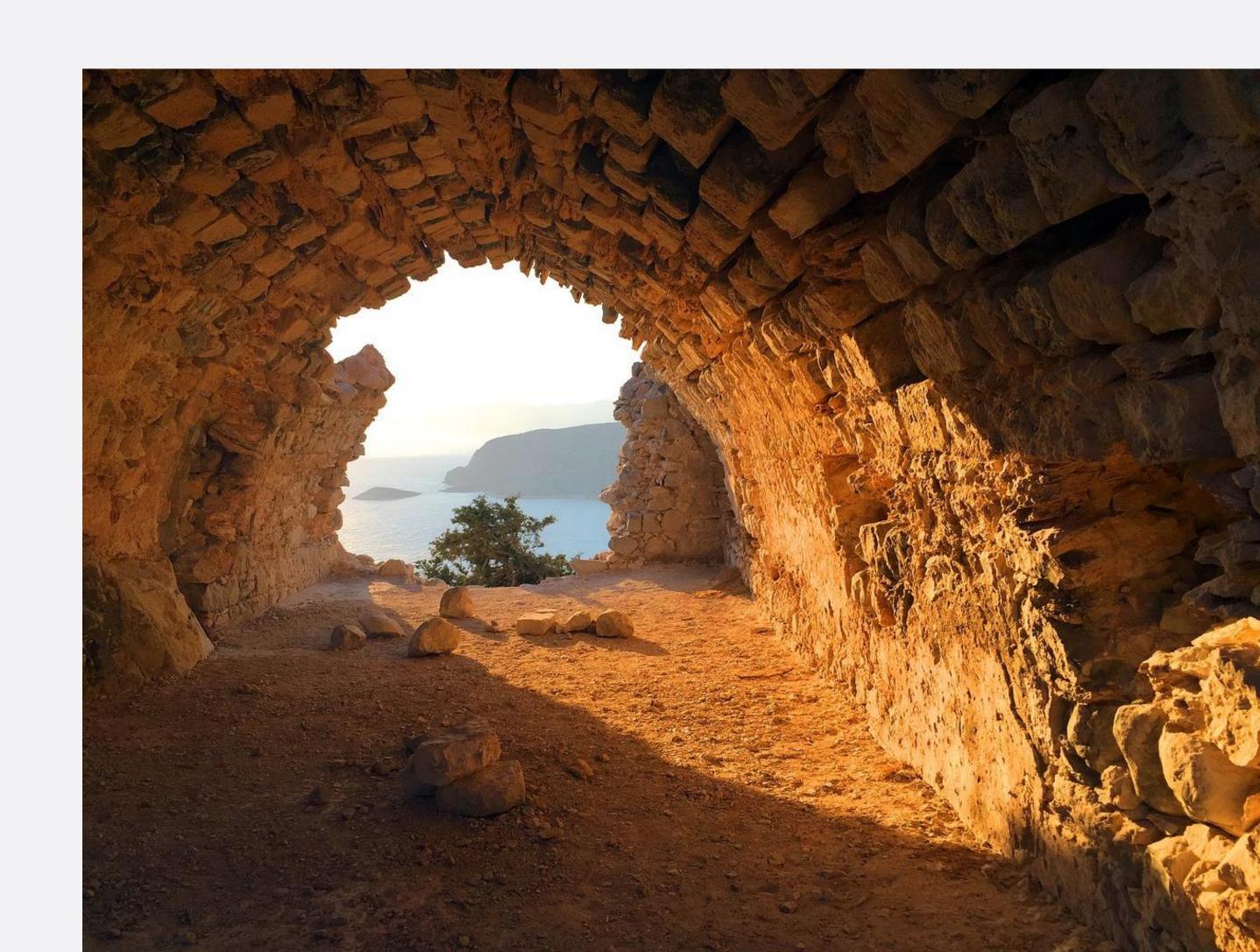
**Priority #3:** "MAINTAIN AND NURTURE"

Years 1-5 ongoing

# Marketing Tactics
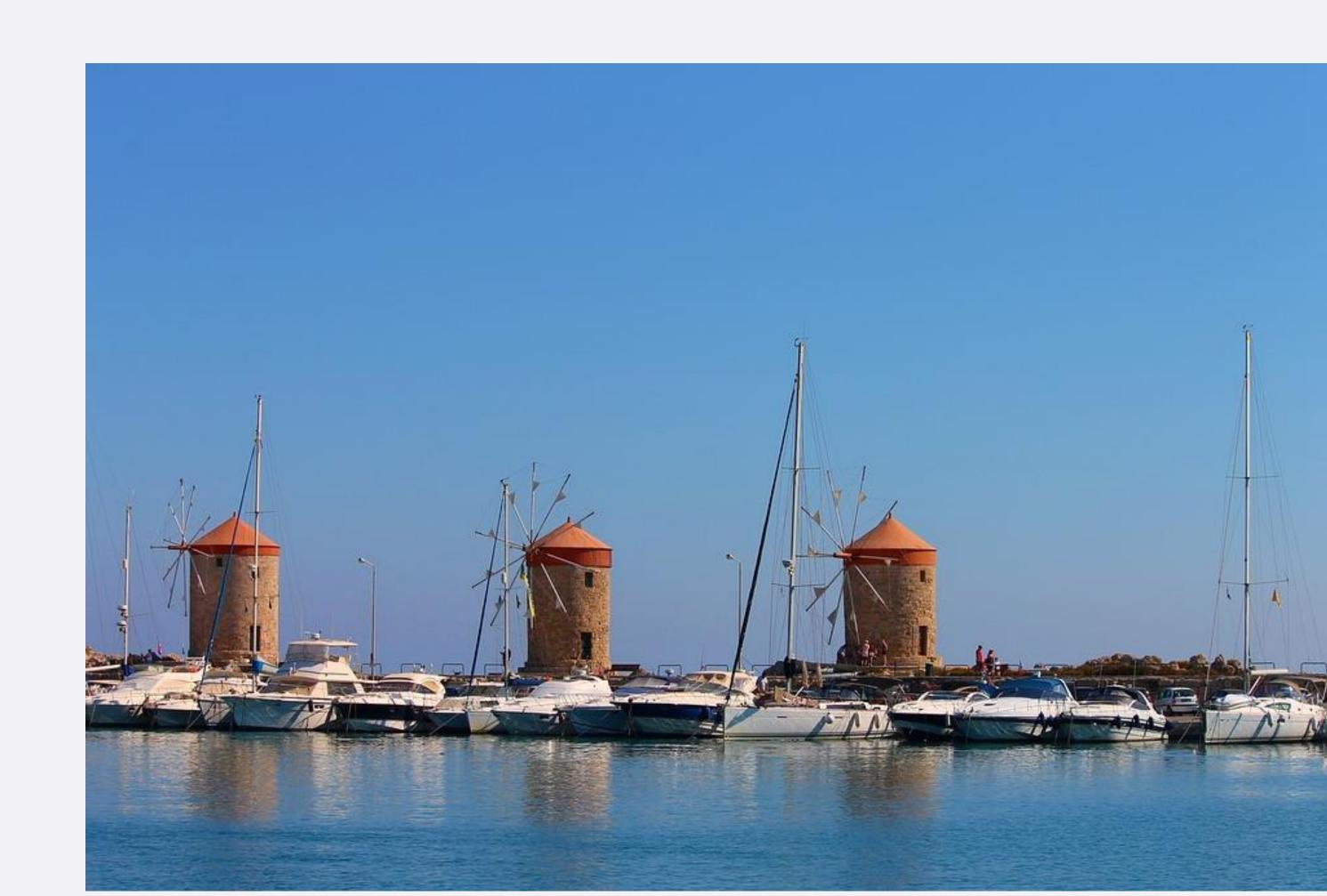
## ✓ Consumer

- Website

- Inclusion in Greek National Tourism Office (GNTO) materials (brand)

- Social media campaigns

- Public relations (PR)

# Marketing Tactics

## ☑ Travel trade

- Work with GNTO offices and PR agencies

- Work with airlines, overseas tour operators and inbound tourism operators

- Trade fairs: GNTO, specialist

# Marketing Tactics

## ✓ Destination

- Build supportive environment – operators who can provide the essentials for an off-season short break

- Develop series of short (1 min.) videos for online use

- Develop local in-destination campaigns to promote spending beyond hotels, activities.

- Develop, implement and maintain an online trip-planning tool, with an events calendar

**Visitor Experience Development Plan**
VISITOR EXPERIENCE PYRAMID

**A hierarchy of experience development supporting the destination brand**

**Brand promise** — Reassuringly familiar – yet surprisingly undiscovered

**USPs** — Combination of cultural and architectural heritage with green natural environment

**Theme & Stories**
- Family vineyards
- Aeons of history
- Colossus and famous residents (e.g. Cicero, Caesar et al)
- Maritime trade with the ancient world
- Folk tales and myths
- Archaeology

**Rhodes Signature Routes**
- Wine and Food
- Magical Monolithos
- Outdoor Expeditions
- Old Town
- Family Fun
- Archaeology
- Reset and Recharge

**Supporting Experiences & Events** — Undiscovered gems, varied landscape, diversity of cultural, Colossal characters, active escape, sun and sea +

**Related Products and Experiences** — Outdoor activities, history/cultural heritage, special interest (retreats, classes, activities), seasonal events, conferences and meetings, training

**F**

RHODES DESTINATION MANAGEMENT PLAN
# ACTION AREAS

# Action Plan

This Action Plan sets out a range of actions to address the objectives and strategic priorities outlined in the DMP.  It contains only limited details – the list of recommended actions, the suggested lead organization for implementation and potential measures of performance.
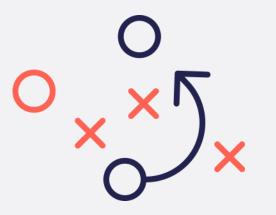
When the group of implementation stakeholders is formed, it will need to elaborate it, with details for each action of:

- People or organisations responsible for leading on the delivery and those involved at a supporting level
- The resources, financial and human, required
- The timescale and level of priority
- SMART (specific, measurable, attainable, relevant, timed) targets.

The Action Plan should be kept 'live' as an ongoing framework for action, reviewed formally at least annually and updated as circumstances change.

# Strategic Priorities

— 6 STRATEGIC PRIORITIES

— 32 ACTION AREAS

— 114 RECOMMENDED ACTIONS

**(1)** **Rhodes for All Seasons**- the "Flagship" initiative

4 Action Areas

15 recommended actions

**(2)** **Repositioning Rhodes**- enhancing its image and broadening its appeal

6 Action Areas

18 recommended actions

**(3)** **Creating Sustainable Rhodes**- sustainable in terms of environment/natural resources, communities, visitors, businesses

8 Action Areas

28 recommended actions

# Strategic Priorities

— 6 STRATEGIC PRIORITIES

— 32 ACTION AREAS

— 114 RECOMMENDED ACTIONS

**4** **Managing Visitors in the City**- maximizing visitor enjoyment and quality of life

4 Action Areas

13 recommended actions

**5** **Extending the Footprint**- spreading tourism benefits to business and communities across the island

5 Action Areas

20 recommended actions

**6** **Enhancing the Visitor Experience-** focusing on quality

5 Action Areas

20 recommended actions

# Strategic Priorities
## — PLUS

+ Crisis preparedness and civil protection

4 Action Areas

13 recommended actions

+ Series of enabling programmes and actions, to support delivery of all priorities

6 Action Areas

29 recommended actions

# Strategic Priority #1
## Rhodes for All Seasons
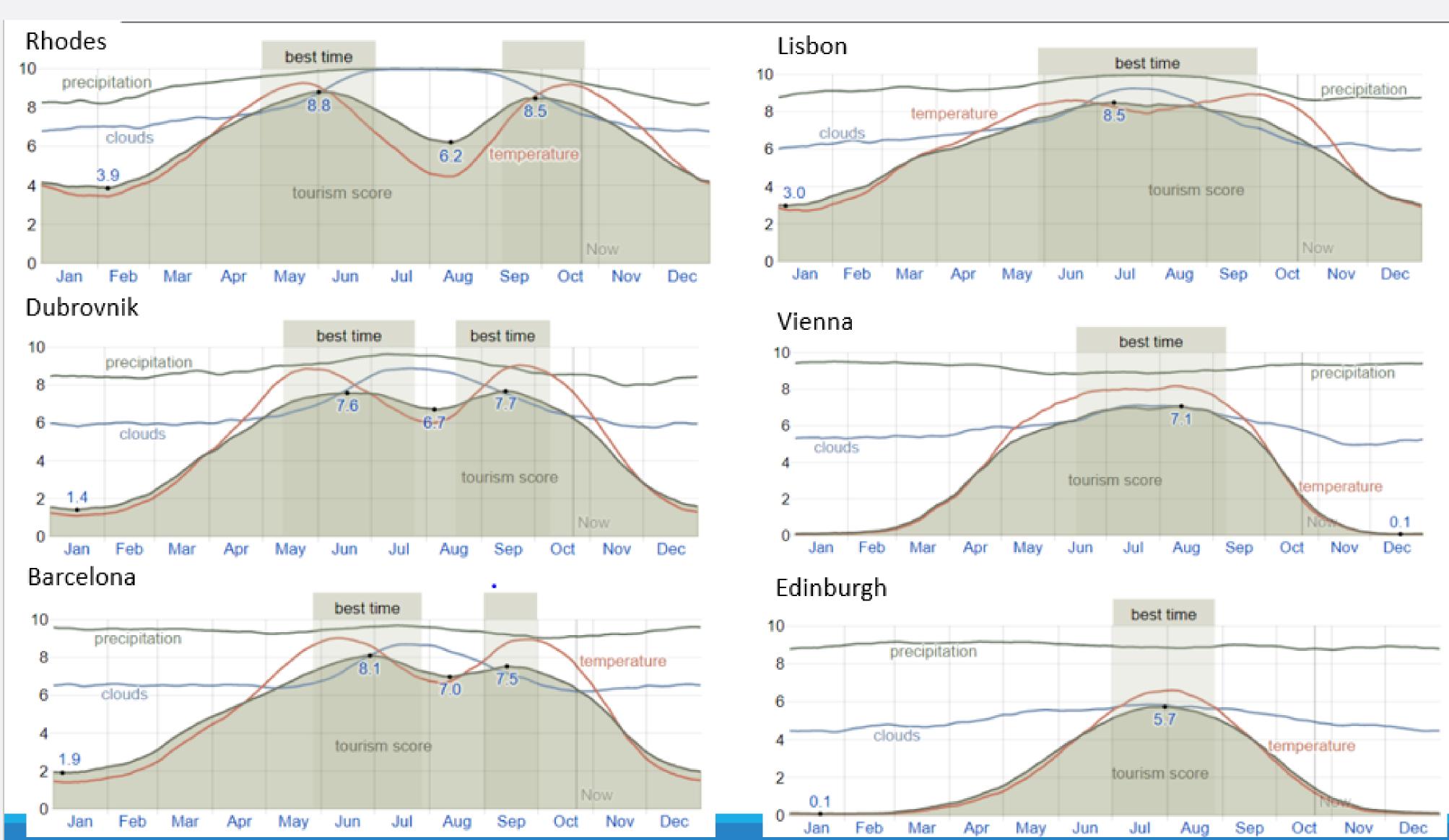
- New experiences and events

- Financial incentives

- Creation of attractive off-season packages

- Growth of winter MICE markets
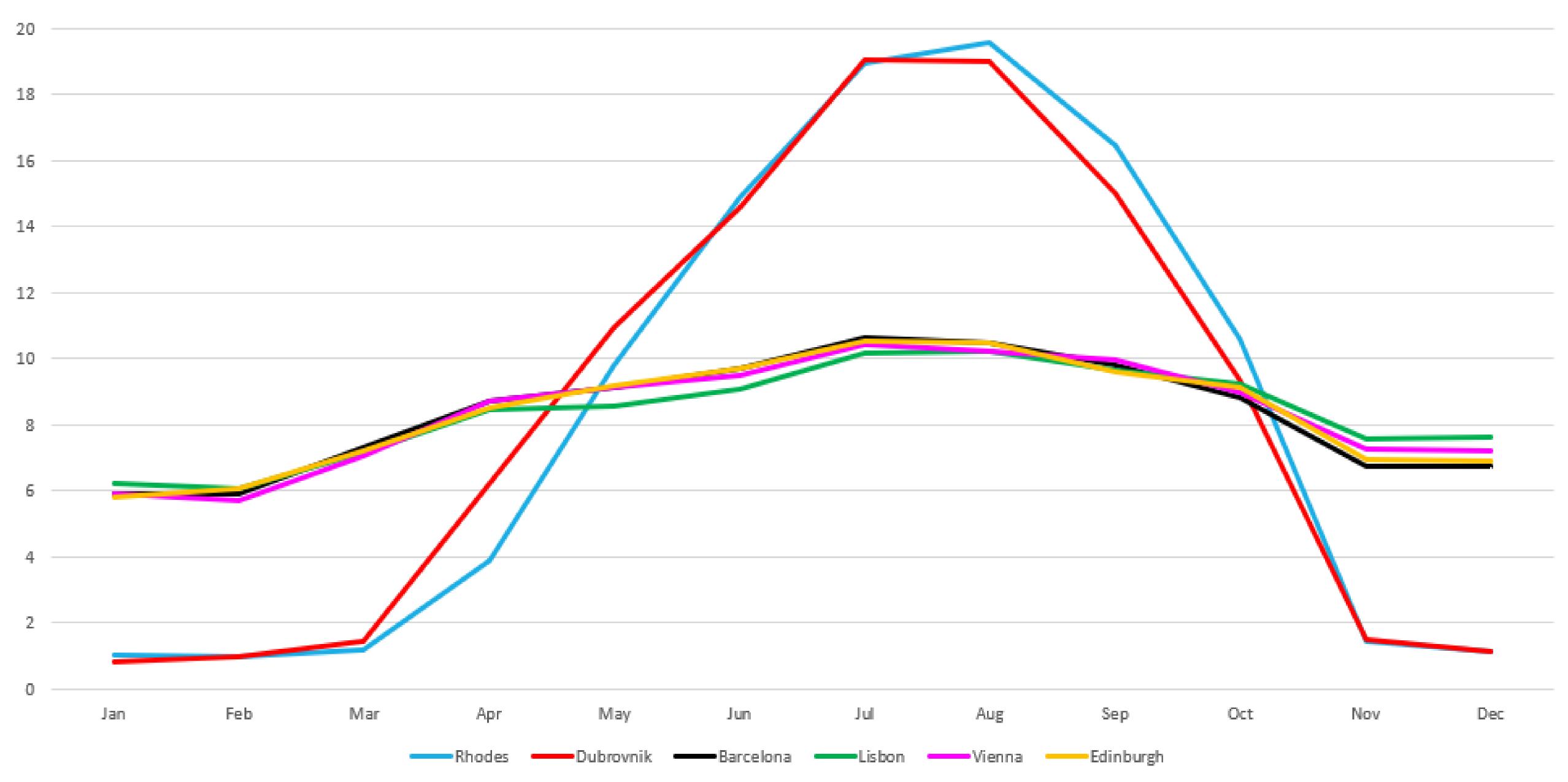
# The Tourism Weather Score



**Rhodes**, **Lisbon**, **Dubrovnik**, **Vienna**, **Barcelona**, **Edinburgh** tourism score graphs.

▶ The tourism score (the filled area) favours clear, rainless days with perceived temperatures between 65°F and 80°F.

▶ Those graphs show that, overall and throughout the year, Rhodes leads the tourism score, having the most favourable weather for tourism activities.

Note: The tourism score (filled area), and its constituents: the temperature score (red line), the cloud cover score (blue line), and the precipitation score (green line).
Source: https://weatherspark.com/ (Rhodes International Airport, Dubrovnik, Barcelona, Lisbon, Vienna, Edinburgh)

# Passenger arrivals to city airports by month as a % of annual arrivals (2017)

# Dubrovnik: out-of-season events development

Dubrovnik Tourist Board has created a programme of exciting **events for the off-season**, including:

- Music - 6 festivals throughout the year, designed with Dubrovnik Symphony Orchestra
- Wine Festival - Early spring. Promotes the city's restaurants, wine bars and cafes; B2B meetings for winemakers and hoteliers
- Good Food Festival - October. Opened up opportunities for new flights and accommodation
- Winter Festival - Includes free 'Winter Saturday Mornings in the City' tours and performances. 7 new European winter flight connections created

# Keys to success:

Tourist board is engaged in negotiations with airlines:

- National air carrier as part of strategic projects in cooperation with the National Tourist Board
- Partnership with the airport in marketing campaigns with international airlines to increase visibility during winter flight schedule
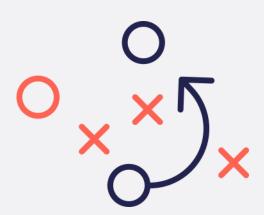
# Strategic Priority #2
## Repositioning Rhodes

✓ **Clear brand identity, differentiating Rhodes from competitors.**

✓ **All-year-round tourism, with high value market segments**

✓ **Attraction of high yield target markets, including more independent travellers (FIT)**

✓ **Increased focus on international conferences**

✓ **A green island**

✓ **Targeted marketing strategy to support repositioning**

## Repositioning

**Visit Flanders**: focusing on two target segments:
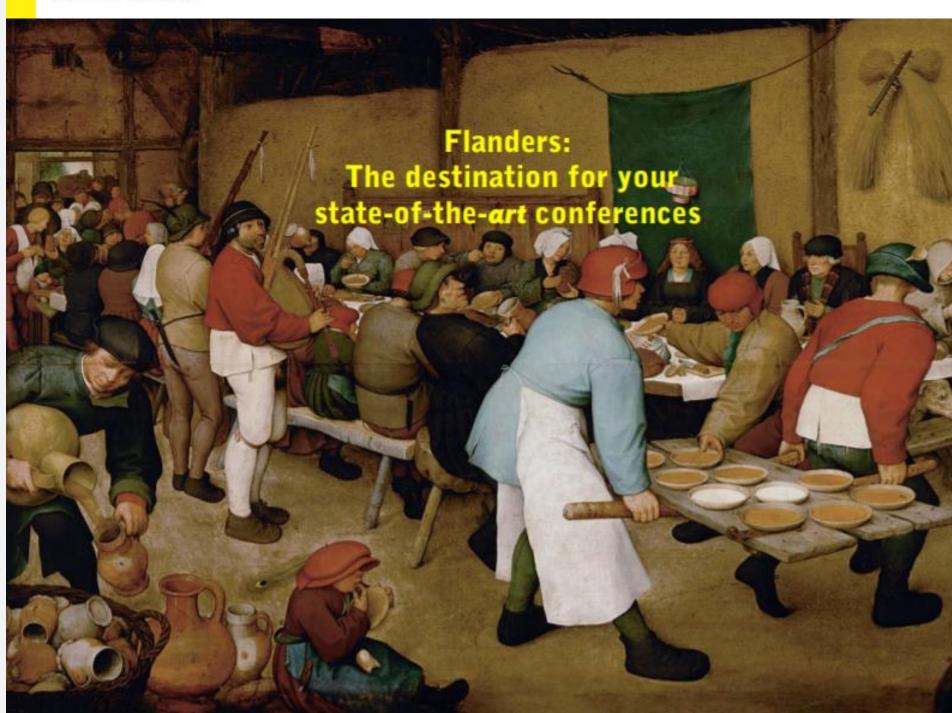
- Cultural traveller - motivated by cultural experiences such as heritage, art and local culture

- MICE traveller - international associations and companies operating in economic growth sectors for Flanders; focus on attracting association conferences.

€72 million euros invested by Visit Flanders in specific experiences in the last 5 years through large leverage projects which match the target segments.

# Strategic Priority #3
# Creating Sustainable Rhodes

**Relating tourism volumes to carrying capacity of Rhodes Town and Lindos**

✓ **Relating tourism volumes to carrying capacity of Rhodes Town and Lindos**

✓ **Action on infrastructure –** seaport, airport, roads, footpaths, cycleways, water, power, energy efficient lighting, transport

✓ **Best practice waste management**

✓ **Water and power conservation / management measures**
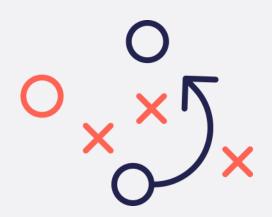
✓ **Quality management of public realm**

✓ **Sustainable practices by tourism businesses**

# Strategic Priority #3

## Creating Sustainable Rhodes

**Relating tourism volumes to carrying capacity of Rhodes Town and Lindos**

✓ **Improved transportation for visitors**

✓ **Carbon-neutral destination – targets and related measures**

✓ **Strengthened links with local producers**

✓ **Improved transportation for visitors**

# Generalitat Valenciana
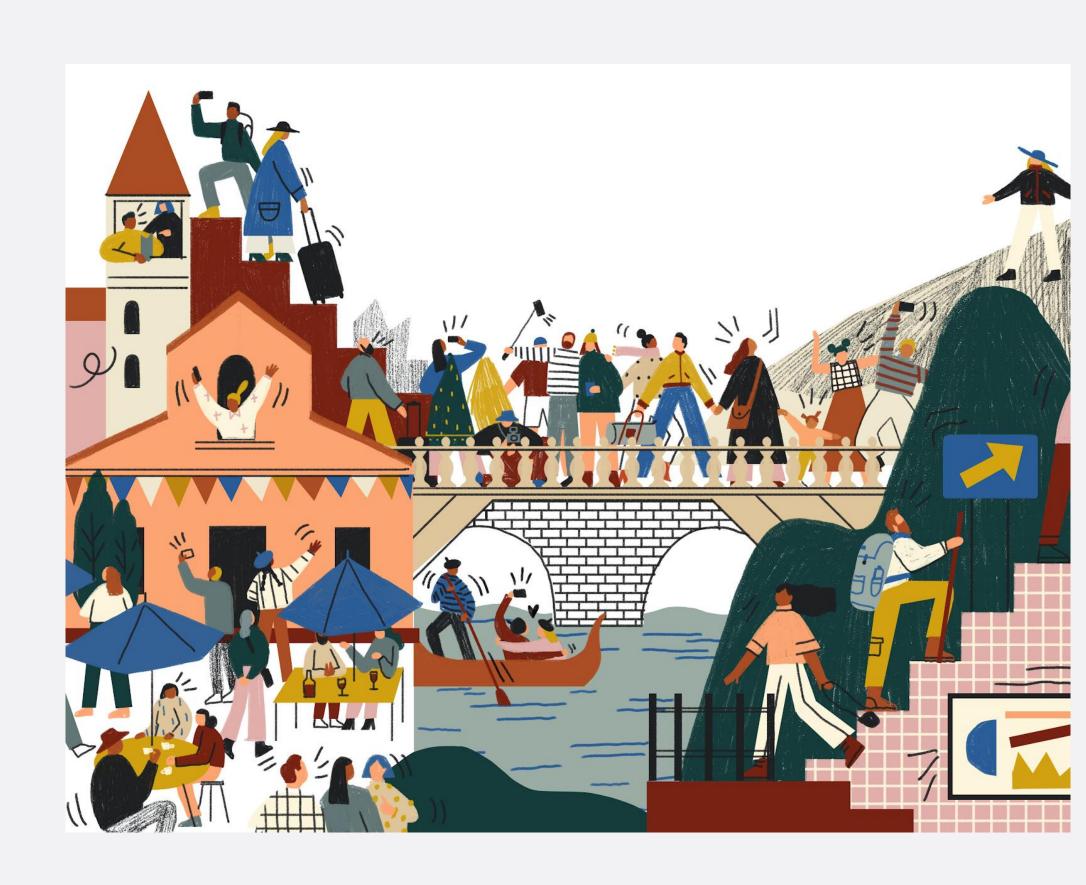
Turisme Comuniat Valenciana, reviewing the issues of tourism overcrowding, produced a

## Tourist Overcrowding Management Model:

- 10 action areas to address tourist overcrowding management of destinations.

- Mechanisms to correct negative impacts of overtourism on destinations

- Suggests use of new technologies to improve the correction mechanisms by actions.

## Three broad components of Action:

- **Urban** – Urban Planning; Heritage Protection; Housing Protection; Public Space

- **Mobility** – Public Transportation; Sustainable Mobility

- **Tourism** – Seasonal Adjustment; Experiential Diversification; Territorial Diversification; Accommodation Regulation

# City of Ghent

The Action

In 1996, the City of Ghent (Belgium) created a car free city centre, with the objectives:

- Re-evaluation of city centre
- Positive effects on environment, liveability, economy and tourism

Methods:

- Digital tools - digital parking guides and apps to encourage slow transport
- Focus on mobility - encouraging and developing alternative transport (cycling, car sharing, electric boats)
- Stimulating new businesses
- Promotion, positioning Ghent's car free city centre as a shopping area

# City of Ghent

## The Results

- Squares and riversides became key meeting points
- Safer city centre
- Improved air quality; $CO_2$ reduction
- Increase in number of pedestrians and cyclists
- Increased use of underground parking
- Increase in number of restaurants and bars in the city centre.

# Ljubljana's sustainable cultural tourism development

## Background

Ljubljana has registered a 115% growth in visits over the last 10 years and is reaching the limits of its carrying capacity. Accordingly, it has implemented measures to ensure sustainable cultural tourism development. These include:

- Research - observe attitudes of locals towards tourists

- Action to spread the flow of tourists to nearby towns and municipalities

- Focus of events development and promotion during off-peak months - e.g. Gourmet Ljubljana food and wine festival in November

- Supporting implementation of national Green Scheme of Slovenian Tourism

- Green Supply Chains project - encourage use of locally produced food in hotels and restaurants

- Establishment of traffic-free city centre in 2008 - the largest car-free zone in the European Union

- Operation of sustainable mobility scheme around the city

- Encouragement to innovative activity-based guided tours of the city (e.g. local cultural heritage, traditional dishes, moustache tour)



https://www.visitljubljana.com/en/about-us/sustainable-tourism-in-ljubljana/
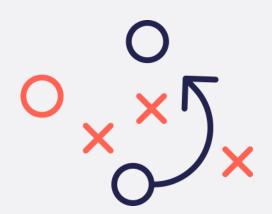
PREJ.*Before.*

The Green Scheme of Slovenian Tourism (GSST) is a national programme and certification scheme operating under the SLOVENIA GREEN brand that:

- unites all efforts towards the sustainable development of tourism in Slovenia,

- offers destinations and tourism providers concrete tools to assess and improve their sustainable operations,

- promotes green action through the Slovenia Green brand

The key strategic goal of the scheme is to introduce sustainable models to Slovenian tourism, both at the tourism provider level and at the destination level. All the objectives of strategic focuses are accompanied by sustainable development and care for the economic, socio-cultural and natural environment.

# Strategic Priority #4
## Managing Visitors in the City

✓ **Enhanced access for visitors**

✓ **Visitor flow management**

✓ **Better access to walking the wall**

✓ **Attracting visitors to surrounding areas and islands**

# Avila Smart Heritage City single open code tool

## The Action

**Detector sensors** (226+) installed in museums and monuments in historic centre.  Assesses 1,000 parameters, including:

- Risk elements affecting buildings and their surroundings
- Management of energy consumption
- Control and planning of the flow of visitors

**Mobile app**, in 4 languages, for visitors to enhance their awareness and knowledge of the conservation of heritage sites. Includes:

- List of monuments/sites of interest
- List of proposed circuits/itineraries
- Videos and other useful information on the city and services
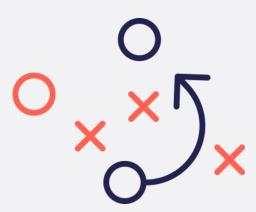
Similar system operating in Florence – with traffic lights for pedestrians

# Strategic Priority #5
## Extending the Footprint

✓ **Engaging and supporting the communities**

✓ **Plans for development along proposed new Signature Routes**

✓ **Supporting MSMEs – business development skills**

✓ **New experiences and itineraries for target segments**

✓ **Strengthened local supply chains** especially for food, wine, crafts and souvenirs

# Istria Gourmet Tourism Product Development

## The Action

Product development initiative established 1995 with the first Wine Road of Istria. Project led by Istria County Tourist Board:

## Methods:
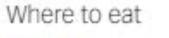
- Project management in cooperation with winemakers
- Approving new candidates in accordance with defined criteria
- Education
- Categorisation
- Quality control
- Marketing and promotion (hosting media houses, thematic fairs, targeted presentations, organising specialised wine events, etc.)
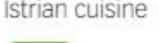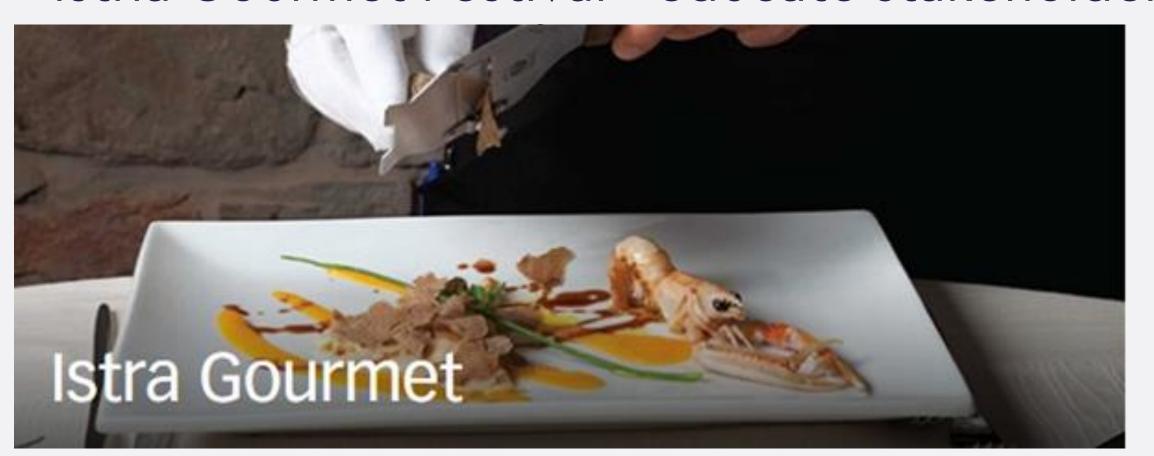
# Istria Gourmet Tourism Product Development

## The Results

- Estimated 150,000 visitors a year to Wine Roads

- 7 new wineries were created with 117 listed winemakers

- Inspired new product - Olive Oil Roads (est. 2002) - 8 roads; 137 listed olive growers; 60,000 visitors a year.

- Istria Gourmet Festival - educate stakeholders

https://www.istra.hr/en

# Makarska Riviera (Croatia) – local community inclusion in tourism development

## Background

Rapid growth in international tourism has brought opportunities, but also challenges of managing growth.

Project trialled by The Travel Foundation and TUI Care Foundation aimed to:

- Explore how to integrate new tourism developments to provide greater benefits to local economies

- Strengthen relationships between the tourism sector and local communities

- Find more inclusive approach to tourism development

# Makarska Riviera (Croatia) – local community inclusion in tourism development

## Action

Stakeholder relationship building

- Destination councils with representation from local tourism boards, hotels, TUI and small local businesses
- Action plans developed and implemented

Local product development and marketing

- Supply-side initiatives (e.g. training); demand-side initiatives encourage hotel guests to explore villages

Promotion of local culture and heritage

- Development of 2 self-guided cultural heritage walking itineraries
- Increased accessibility to heritage sites
- Sharing of information on events with hotel staff

Youth employment and enterprise workshops in restaurants and bars in the city centre.

## Results

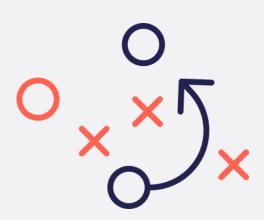After just one season, there were positive signs

that the initiatives were beginning to bear fruit.

- 17 of the 20 bar and restaurant owners trained (85%) had implemented changes
- to business practices, including using social media and changing menus and opening hours.
- Over 800 hotel guests participated in the new 'Taste the Village' excursions across the first season.
- Business owners reported an 11% increase in footfall from hotel guests to the villages and 13% reported increased sales.

**60%**
of those trained
secured jobs

# Strategic Priority #6
## Enhancing the Visitor Experience

- **Point of arrival welcome and information**

- **Enhanced access to Rhodes' cultural and natural heritage and character**

- **Quality assurance**

- **Enhanced access to destination information**

- **Events to enhance interaction between visitors and local communities**

# Supporting Priority 1
## Crisis Preparedness / Civil Protection

- Legal framework for crisis response
- Operational framework for emergency response
- Crisis management plan
- Crisis recovery plan

# Supporting Priority 2
## Enabling/ Supporting Actions (cross-cutting)

✓ **Industry education and training - food and drink, customer service, online marketing and information provision**

✓ **Research and intelligence**

✓ **ICT systems and applications**

✓ **Partnership facilitation**

✓ **Performance measurement / management**

✓ **Effective law enforcement**

**Visitor Experience Development Plan**
VISITOR EXPERIENCE PYRAMID

**A hierarchy of experience development supporting the destination brand**



**Brand promise**
Reassuringly familiar – yet surprisingly undiscovered

**USPs**
Combination of cultural and architectural heritage with green natural environment

**Theme & Stories**
- Family vineyards
- Aeons of history
- Colossus and famous residents (e.g. Cicero, Caesar et al)
- Maritime trade with the ancient world
- Folk tales and myths
- Archaeology

**Rhodes Signature Routes**
- Wine and Food
- Magical Monolithos
- Outdoor Expeditions
- Old Town
- Family Fun
- Archaeology
- Reset and Recharge

**Supporting Experiences & Events**
Undiscovered gems, varied landscape, diversity of cultural, Colossal characters, active escape, sun and sea +

**Related Products and Experiences**
Outdoor activities, history/cultural heritage, special interest (retreats, classes, activities), seasonal events, conferences and meetings, training

# Visitor Experience Development Plan
## 7 SIGNATURE ROUTES

**1** The Best of Rhodes' Wine and Food

**2** Magical Monolithos

**3** Rhodes Outdoor Expeditions

**4** Rhodes Old Town

**5** Rhodes Family Fun Days

**6** Archaeology Adventure

**7** Reset & Recharge In Rhodes

RHODES DESTINATION MANAGEMENT PLANNING

# GOVERNANCE AND FUNDING

# 3 Scenarios for Synergistic DMP Governance in Rhodes

## Common Aspirations

- Highlight destination management as a key area of local policy-making

- Kick off information and resource sharing between partner organisations

- Facilitate commitment to a strategic vision and objectives

- Strengthen and expand partnership-building in the medium to long term

- Resolve, in certain cases, implications derived from overlaps of responsibilities among public sector organisations

# Scenario #1 Allocation of Responsibilities for Implementing the DMP to an Existing Organisation

## Local Challenges and a Potential Role for the Region of South Aegean

| Local Challenges & Opportunities | Role for the Region |
|---|---|

**Local Challenges & Opportunities**

- DERMAE INC: This type of municipal company is not allowed to sign programmatic agreements

- Association of the Development and Progress of the Dodecanese' (DETAP): a civil, non-profit company, whose sole founder and partner is the Chamber of Commerce and Industry of Dodecanese.

Supporting local business development, conducting studies and encouraging continuous professional development is the core of DETAP's activities.

A decision by the Chamber's Board of Directors would be necessary for revising DETAP's statute and incorporating a series of provisions for tasks related to the DMP's implementation

**Role for the Region**

- A leading role for the Region of Aegean mainly through its Development Agency – "ENERGIAKI S.A."?

- Putting the implementation of the DMP under the umbrella of the Region's Directorate of Tourism, ENERGIAKI S.A. would act as a vehicle for mobilising domestic and EU funds.

- The Region would then work closely with the Municipality of Rhodes and local stakeholders on selected actions.

# Scenario #1 Allocation of Responsibilities for Implementing the DMP to an Existing Organisation

## Scenario 1 Assessment

| + Pros | − Cons |
|---|---|

**Pros**

- A leading authority to assume the role of the DMP implementation body and enable short-term partnership-building within a legal framework with specific terms and conditions

- Public sector stakeholders to shape an inclusive agenda of destination management planning.

- Requires a moderate level of consensus among private sector stakeholders

- Diversity of funding resources (programmatic agreements, EU grants, sponsorships, charities with regard to the provision of goods, services and projects, etc.).

- Time-efficient processes for organisational restructuring.

**Cons**

- Decisions by parent authorities over statutory amendments would be necessary

- Public sector funding will dominate initial stages of DMP implementation.

- Dominance of public sector organisation/s may exclude private sector businesses from decision-making

- Individual businesses may get involved once collaboration becomes more mature.

- Time-consuming processes for project implementation

- Staff recruitment strictly under the umbrella of a public sector organisation.

- Communication of DMP outputs and outcomes to be dependent mainly on the public sector's skills and activities.

## Scenario #2 Establishment of a lighter and more flexible governance structure

Mutual Agreement on a Strategic Agenda and Individual Commitment to a Group Effort

# Scenario #2 Establishment of a lighter and more flexible governance structure

## Scenario 2 Assessment

## Pros

- A higher level of private sector engagement, alongside key public sector organisations.

- Commitment to a joint strategic vision and objectives

- A dedicated agenda with clear roles and responsibilities.

- A more balanced distribution of funds from the beginning.

- Diversity of funding sources and fundraising opportunities.

- Staff recruitment under the umbrella of an ambitious partnership brand

- Communication benefits for the public sector through the private sector's respective skills and activities.

## Cons

- Lack of legal entity status and implications.

- Negotiation capacity depends on individual members.

- Increased funding by the private sector may lead to lack of government control

- Need for a high level of consensus and trust among key stakeholders and/or individual businesses –

- High level of risk associated with changes in the strategy of individual partners.

- Dependent on partners having the capacity to carry out their share of activities.

- High dependence on the vision of personalities who first established the partnership.

# Scenario #3 Creation of an Entity by One or More, Public and/or Private Sector Stakeholder

## Changes to Legislation Would Be Required

- National Level:
  Amendments to the framework on public and private partnerships
  (Law 3389/2005 as amended by Law 3463/2006)

- Regional-Local Level:
  Amendments to the framework on 'Networks of Municipalities and Regions'
  [Law 3463/2016 (Articles 219 & 220) and Law 3852/2010 (Article 101)]

- Local Level:
  Amendments to the framework on Development Companies
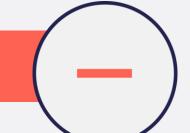  (Law 3463/2006 as amended by Law 3852/2010 and Law 4555/2018)

# Scenario #3 Creation of an Entity by One or More, Public and/or Private Sector Stakeholder

## Scenario 3 Assessment

| Pros | Cons |
|---|---|

**Pros**

- Public sector stakeholders to assume a leading role in short-term partnership-building within a legal framework with specific obligations

- Public sector stakeholders to shape an inclusive agenda of destination management planning.

- Diversity of funding sources (programmatic agreements, EU grants, sponsorships, charities with regard to the provision of goods, services and projects)

- Specialisation of legislation for public-private partnerships and common initiatives

- Staff recruitment under the umbrella of an advanced, organisational scheme

- Communication benefits for the public sector through the private sector's respective skills and activities.

**Cons**

- Public sector funding may dominate initial stages of the partnership.

- Public sector stakeholders to define call to action for the private sector's involvement

- Requires a high level of consensus among private sector stakeholders

- Renegotiation may be problematic

- Individual businesses may get involved once collaboration becomes more mature.

- Time-consuming legislative work.

- Time-consuming processes for organisational set-up.

- Time-consuming processes for project implementation

- Lack of domestic experience on comprehensive destination management partnerships

# CRITICAL SUCCESS FACTORS & DISCUSSION

# Critical Success Factors

**1** Establishment of effective partnership mechanisms for steering and implementing the DMP.

**2** Full and active engagement of the Regional and Municipal Authorities.

**3** Endorsement and active support from the Ministry of Tourism and other Ministries, as required.

**4** Involvement and support of all tourism-related sectors of the economy, primarily through the medium of the Dodecanese Chamber and SETE

**5** Close collaboration of all other key stakeholders, including those responsible for transportation infrastructure and utility services.

**6** The ability to secure the required funding and deploy appropriately skilled human resources to implement the recommendations of this DMP.

# Critical Success Factors

**7** Securing the understanding of the people and communities of Rhodes to the Vision and Strategic Priorities of the DMP; and their active engagement in its implementation

**8** Recognition of the importance for tourism of resolving environmental issues including sustainable energy usage, waste management, water consumption, and pollution; and of ensuring affordable housing for residents.

# THANK YOU!