
PILOT DESTINATION MANAGEMENT PLAN FOR SANTORINI



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

TODAY – AGENDA

A

**DMP Pilot
Programme
Progress Review**

B

**Destination
Management
Planning**
Role and Value

C

Santorini DMP
Where Are We
Now?

D

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

E

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

F

Santorini DMP
Selected Actions

G

**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
CYCLADES

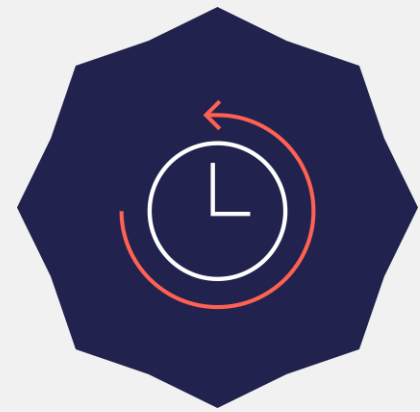
CHAMBER OF
DODECANESE

SETE

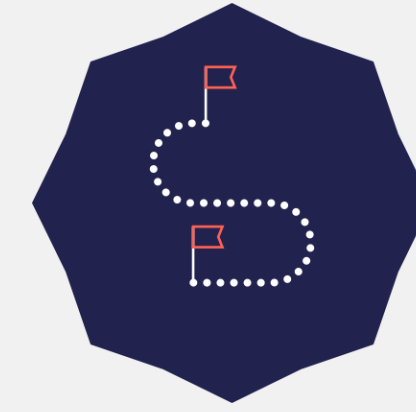
Milestones

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

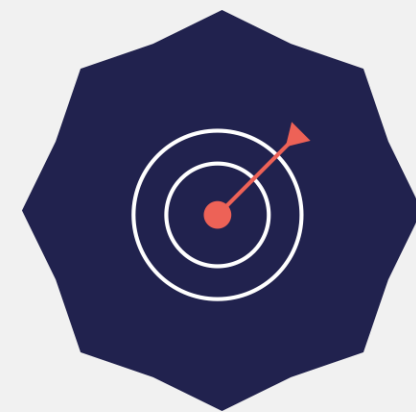
Santorini Destination Management Plan



BACKGROUND



PROGRESS



PURPOSE OF
TODAY

B

DESTINATION MANAGEMENT PLANNING

ROLE AND VALUE



Context of Destination Management Planning



Global tourism growth



Major industry and employer on Santorini



Greek government strategy:

- Sustainability
 - New market segments and products
(affluent travellers, wellness et al)
-



Sustainability challenge



Opportunity for Santorini's residents to decide how tourism should contribute to their future: economy, social life, environmental conservation.



Steps to achieve this

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 Santorini in tourism now?
SITUATION ANALYSIS

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

3. How does Santorini 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

SANTORINI DESTINATION MANAGEMENT PLANNING

WHERE ARE WE NOW?



Situation Analysis: ACCOMMODATION

Santorini hotel beds in 2019 (all): 14,045

5* Hotel beds	2,659 (19%)
4* Hotel beds	4,766 (34%)
3* Hotel beds	2,955 (21%)
2* Hotel beds	2,637 (19%)
1* Hotel beds	1,028 (7%)

Short-term rentals

3,300 listings

Hosts with Multiple listings = c. 87.5%

Entire homes/apartments = c. 73% of total listings

Tourist Villas

600 units offering 3,619 beds

Furnished rooms and apartments:

1,983 units offering 9,516 rooms/22,099 beds

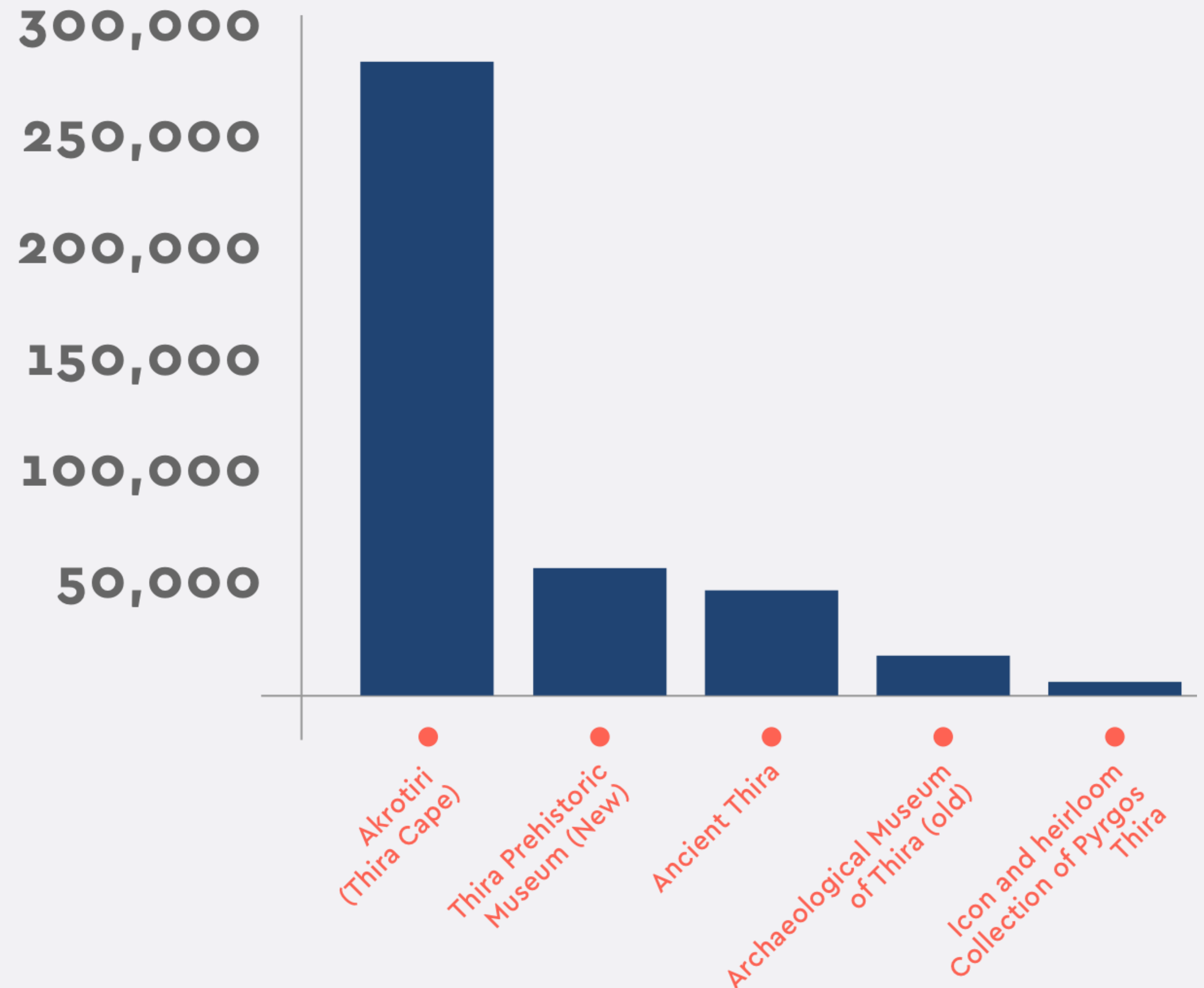
SOURCES: HELLENIC CHAMBER OF HOTELS; MINISTRY OF TOURISM; AIRDNA; INSIDE AIRBNB

N.B. There may be some double counting of properties between the last three categories, as a result of data deriving from different sources.

Situation Analysis: HOTEL BED CONCENTRATION IN MUNICIPAL COMMUNITIES



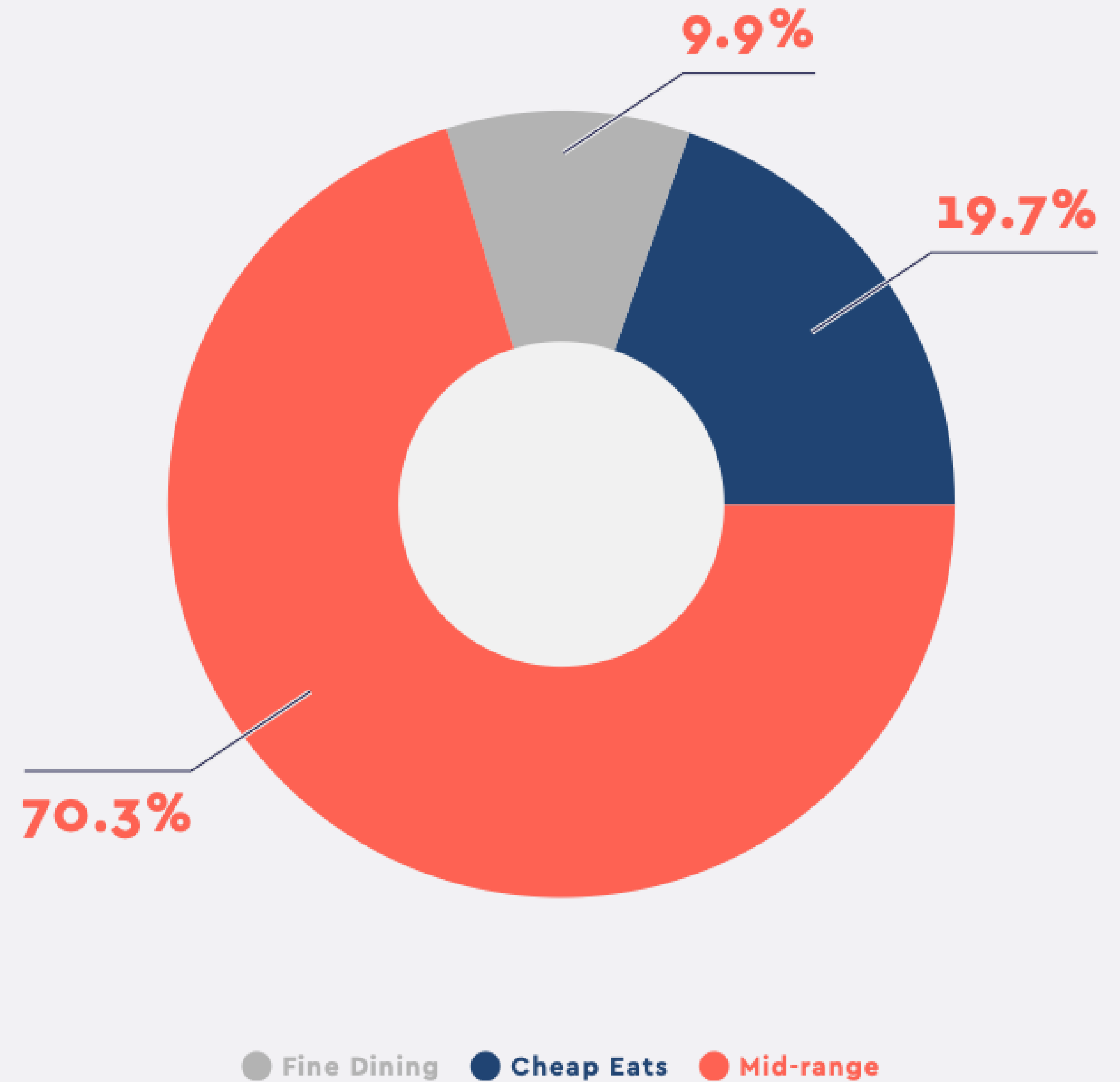
Situation Analysis: ATTRACTIONS



No. of TripAdvisor Reviews in May 2019

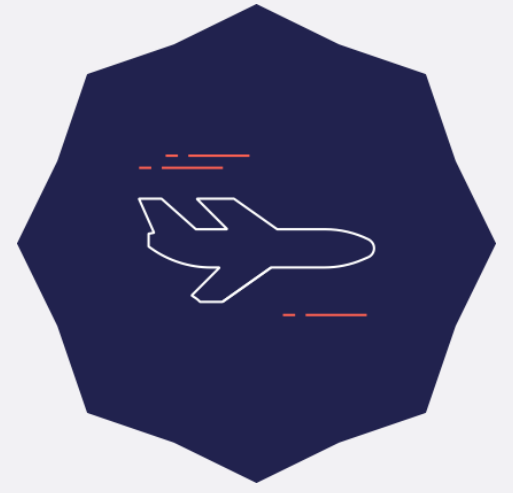
Situation Analysis: GASTRONOMY

Share of TripAdvisor
Listings per Category of
Restaurants (May 2019)

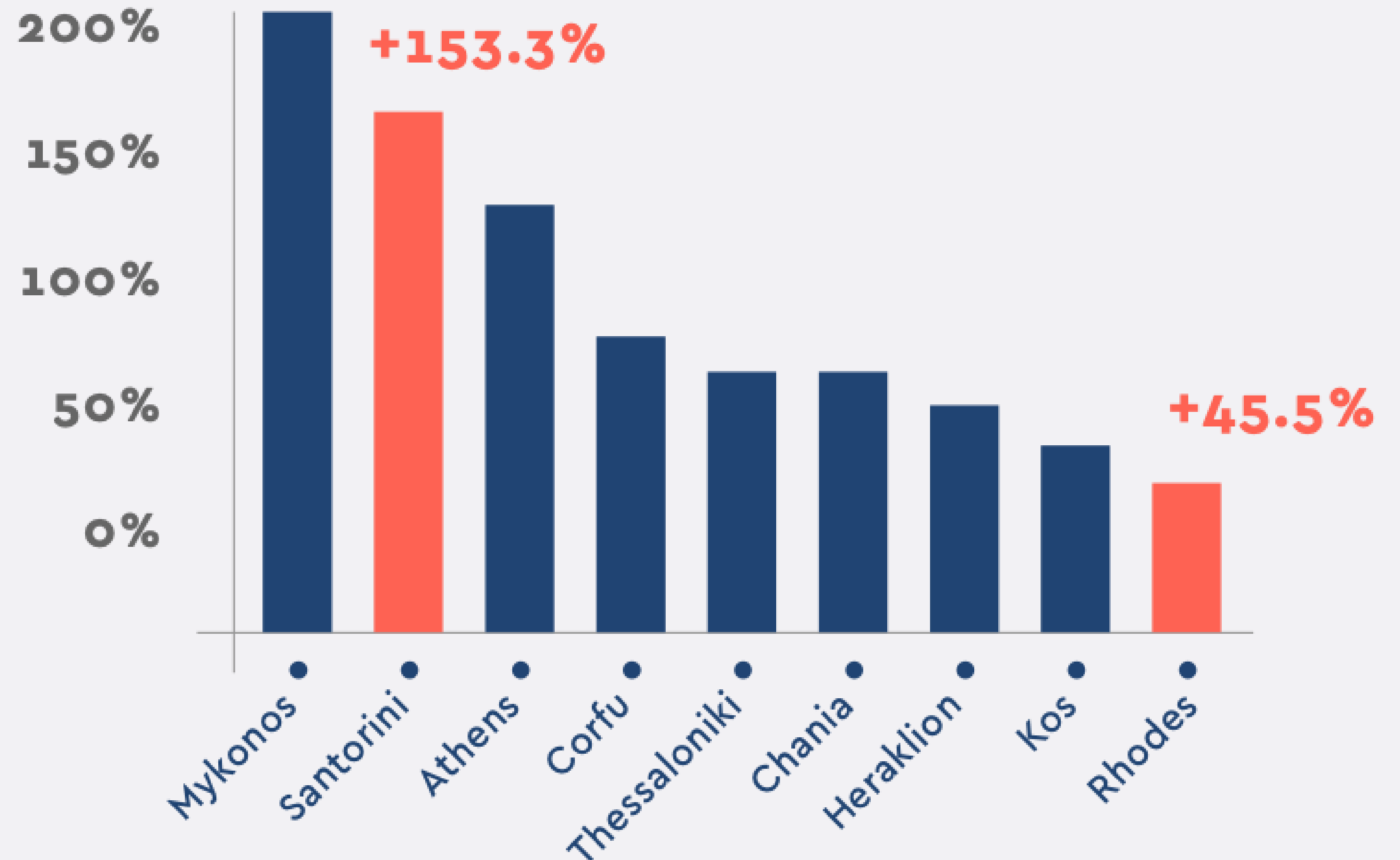


Situation Analysis:

DESTINATION PERFORMANCE:



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



Situation Analysis:

DESTINATION PERFORMANCE: 2.85 MILLION ARRIVALS IN 2018



By air: 1,070,000

- International arrivals: 507,000;
- Domestic arrivals: 563,000.



By sea: 1,779,000

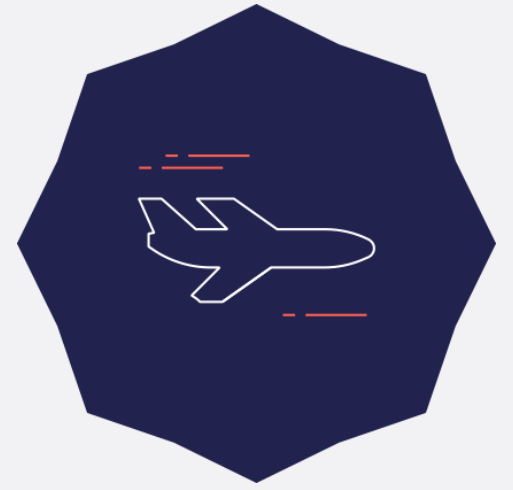
- General – ferry/non-cruise: 1,030,000;
- Cruise: 749,000.

Situation Analysis: GROWTH OF HOTEL BEDS / AIR ARRIVALS

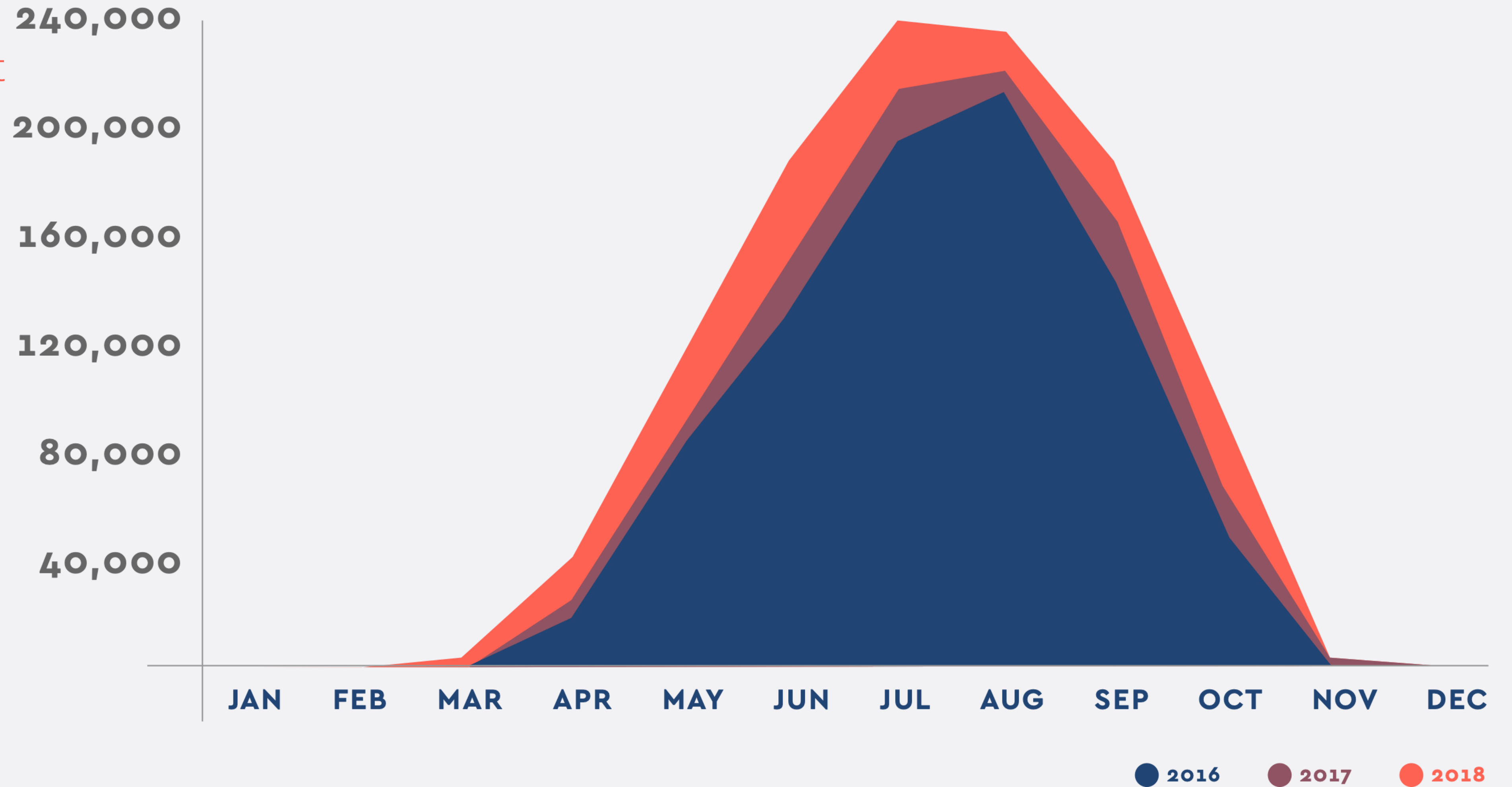
YEAR-OVER-YEAR GROWTH (%)	HOTEL BEDS	AIR ARRIVALS
2016/2015	+1.2%	+15%
2017/2016	+2.6%	+11.5%
2018/2017	+3.4%	+16%
2019/2018	+1%	-

Situation Analysis:

SEASONALITY

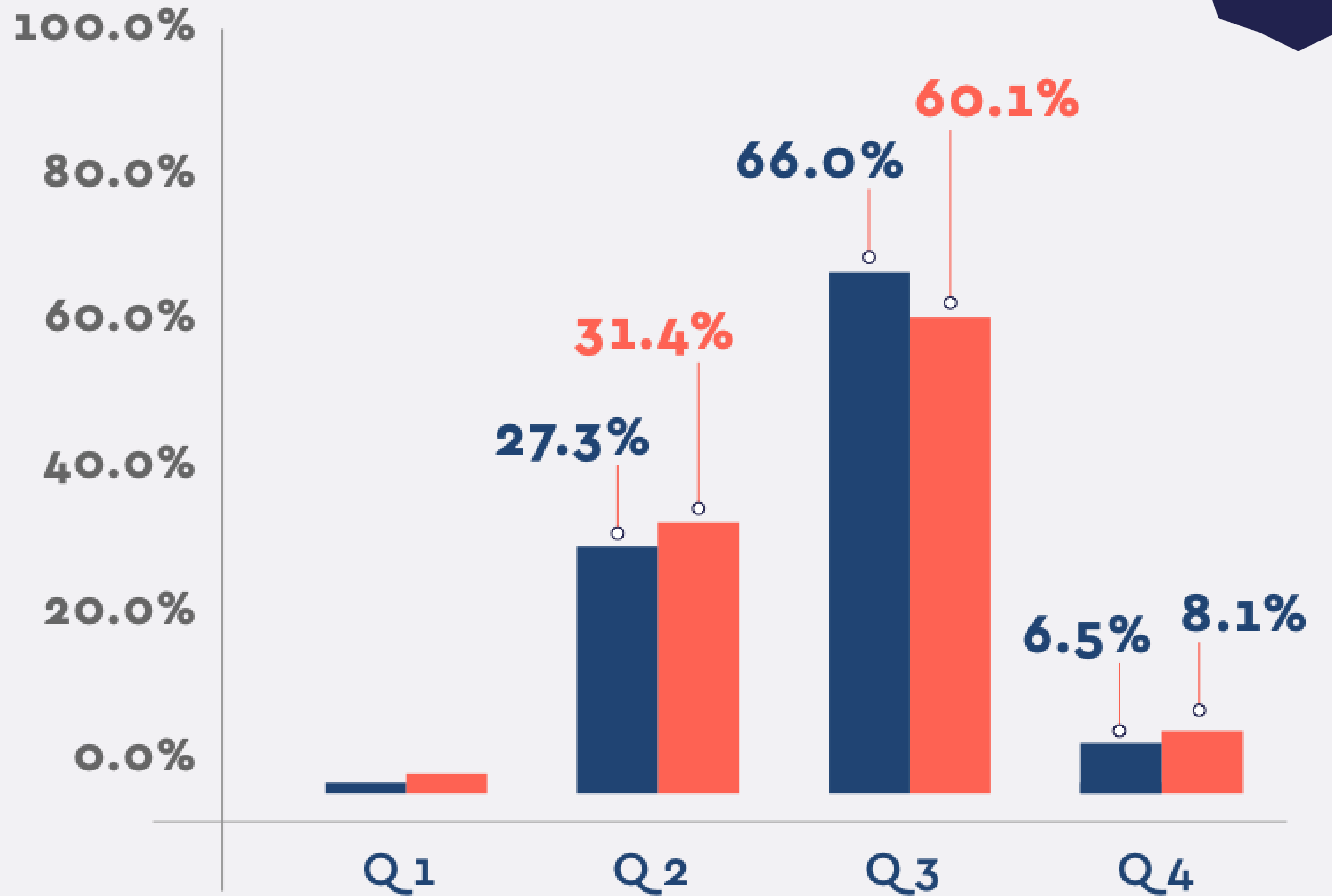
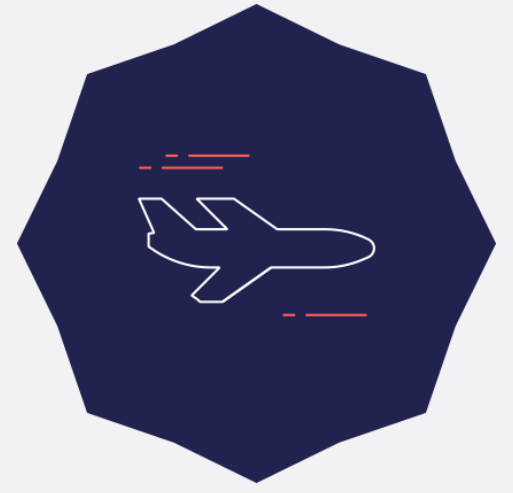


International Air Arrivals (Monthly) at Santorini Airport (2016-2018)



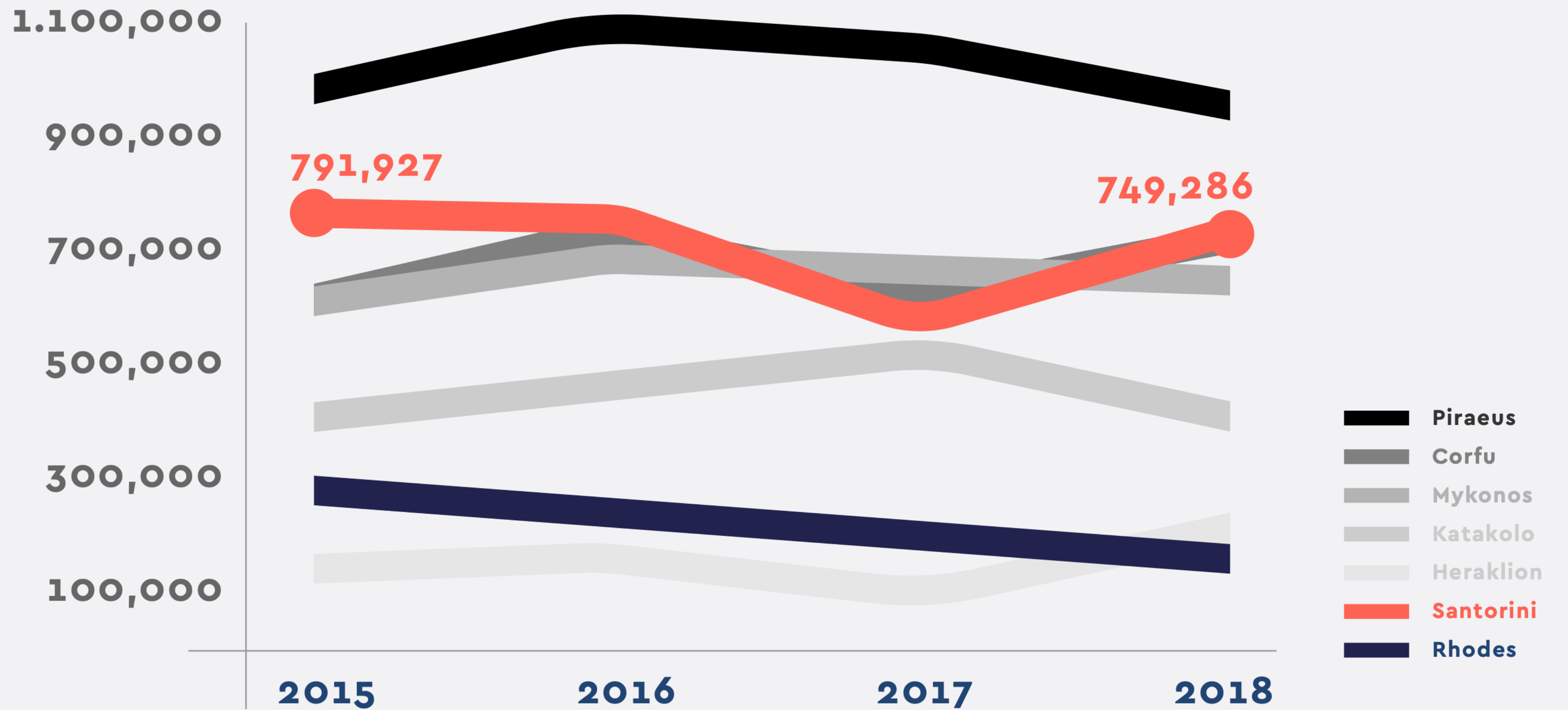
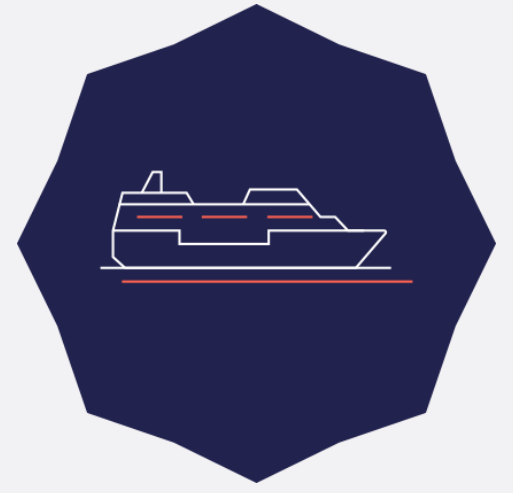
Situation Analysis: SEASONALITY

Shares of International
Air Arrivals per Quarter
at Santorini Airport
(2016-2018)



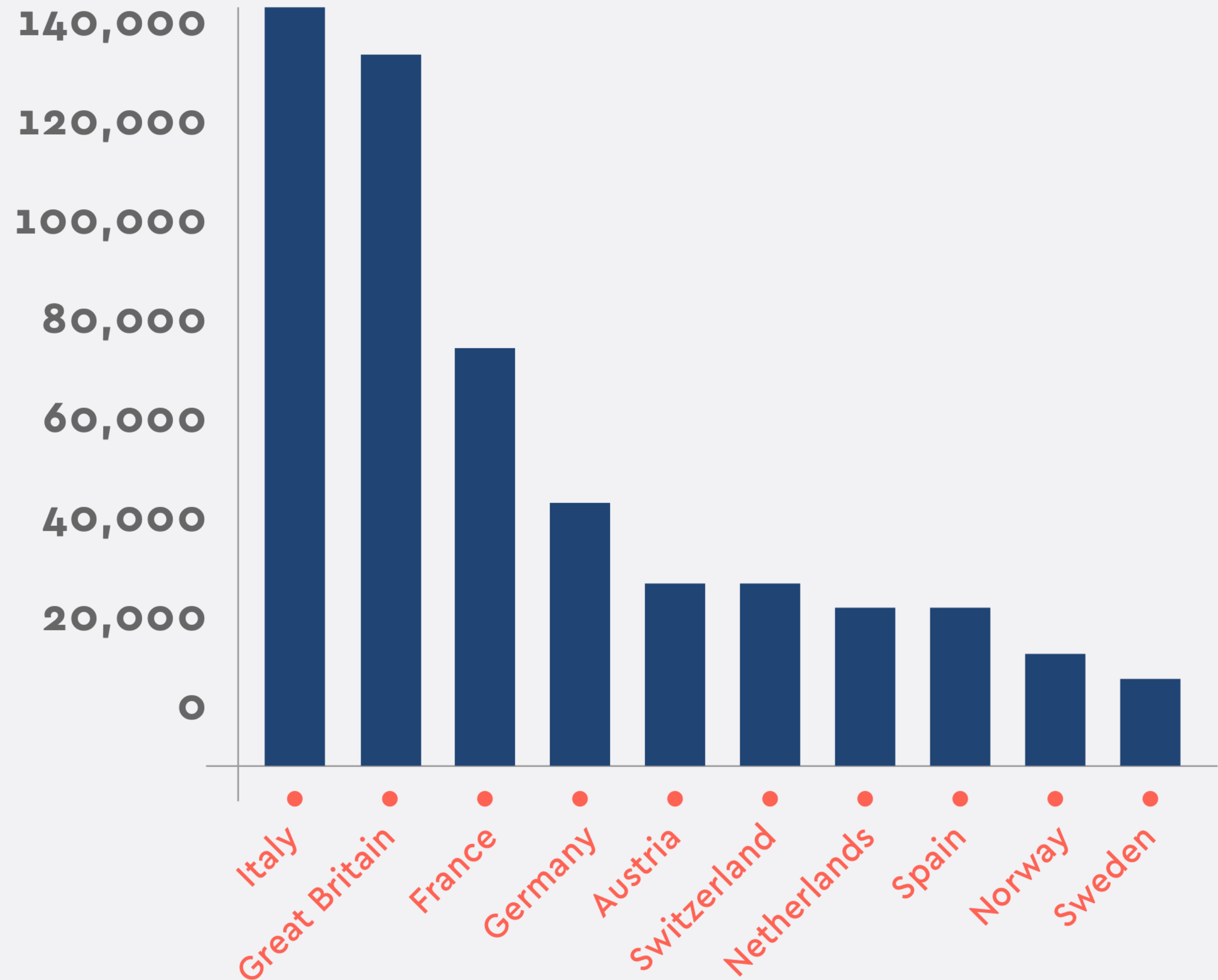
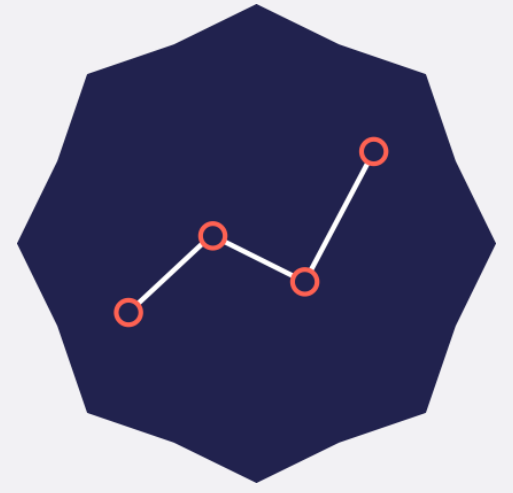
Situation Analysis:

CRUISE SHIP PASSENGERS IN GREECE (2015-2018)



Situation Analysis: MARKETS

International Arrivals at
Santorini International
Airport (2018)



Organisations Involved in the Policy Workshop

- ✓ Chamber of Cyclades
- ✓ Municipality of Santorini
- ✓ Region of South Aegean
- ✓ Santorini Hoteliers Association
- ✓ Business Union of South Santorini
- ✓ The Union Boatmen of Santorini
- ✓ Santorini Boatmen & Mooring Services
- ✓ Atlantis: Professional Union of Owners of Tourist Accommodation Enterprises in Thira
- ✓ Santorini Lodging Rooms and Apartments Association
- ✓ Santorini Chamber of Commerce
- ✓ Civil Aviation Authority
- ✓ Save Oia (NGO)

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 - BUSINESSES

- ✓ Municipality of Santorini
- ✓ Restaurant Selene
- ✓ SantoWines
- ✓ Geothira M.A.E.
- ✓ Wine Museum
- ✓ Metaxas Group
- ✓ Region of South Aegean
- ✓ Restaurant Krinaki
- ✓ Researchers involved in the Master Plan for the Cultural Route of Santorini
- ✓ Santorini Hoteliers Association
- ✓ Domaine Sigalas
- ✓ Institute for the Study and Monitoring of the Santorini Volcano
- ✓ Heliotopos Conferences
- ✓ Nomikos Estate

Local Surveys via SurveyMonkey

end of June – middle of August



Local Businesses



**Members of
Local Communities**

Attitude towards tourism development

Local Community Members

11%

like to see streets full of visitors

22%

believe that the positive impacts of tourism outweigh the negative ones

94%

believe that the tourism authorities should focus more on dealing with tourism policy issues that affect the residents' quality of life

Businesses and Local Community Members

Both groups

think that tourism development is not satisfactory; 80% (business), 87% (community)

Most Important Challenges in Relation to Tourism Development

Local Community Members

Uncontrolled sprawl	76%
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Traffic congestion	70%
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Crowd congestion in specific places / time periods	58%
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Waste management issues	51%
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Lack of cleanliness	50%
---------------------	-----

Insufficient car parking	48%
--------------------------	-----

Local Businesses

Traffic congestion	85%
--------------------	-----

Uncontrolled sprawl	79%
---------------------	-----

Crowd congestion in specific places / time periods	66%
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Waste management issues	65%
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Insufficient car parking	53%
--------------------------	-----

Lack of cleanliness	47%
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Most Important Challenges in Relation to Tourism Development

Local Community Members

Businesses and Local Community Members

Both groups expressed concerns in additional comments about the low quality of infrastructure, the low quality of public transport and degradation of the natural landscape

Surveys of Recent Visitors via Pollfish

end of June - July



USA



United Kingdom

Key Words to Describe the Destination



USA

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 30%

Exciting / lots to do 28%

Traditional 22%

Touristic 22%

Visitor Attitudes



USA

400

Very satisfied with their experience

60%

Satisfied with their experience

31%

Wish to return for another holiday^[SEP] in the next five years

81%

Would recommend the^[SEP] destination to others

93%



United Kingdom

400

Very satisfied with their experience

54%

Satisfied with their experience

40%

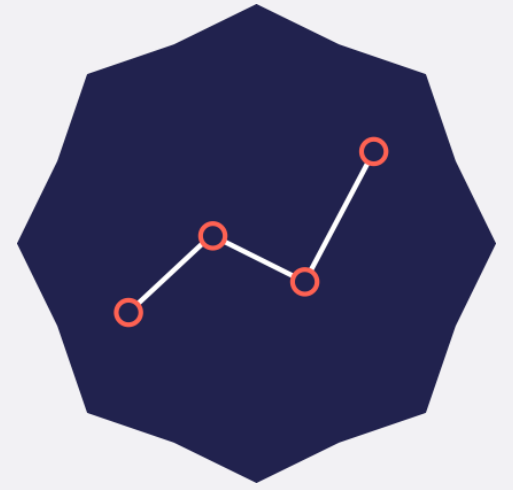
Wish to return for another holiday^[SEP] in the next five years

89%

Would recommend the^[SEP] destination to others

98%

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

Challenges: ECONOMIC AND TOURISM IMPACT



Economic

- Limited economic diversity
'mono-economy'
- Diversify economic base
agriculture

Tourism Impact

**55% of community do not believe
benefits outweigh negative impacts**

Benefits

- Jobs for local people
- Income for local shops
and SMEs
- Demand for local food
and crafts

Negative impacts

- Living environment for
local people
quality of life
- Natural environment
e.g. biodiversity,
coastal areas, water,
pollution

Challenges: CONGESTION AND HOUSING



! Congestion / Overcrowding (Oia & Fira)

- Destroys visitor experience
- Inconveniences residents
- High volume of short-term visitors = disproportionately limited revenue
- Day visitors:
 - 'Reduce a lot':
businesses - 42%;
communities - 44.5%
 - 'Reduce a little':
businesses - 33%;
communities - 31%
- Manage visitor flows:
96% of local businesses
and 85% of members of
local communities say
'action is required'

Challenges: CONGESTION AND HOUSING



⚠ Short-term Rentals and Affordable Housing

- Growth of short-term rentals has been negative for local communities in Santorini, say:
74% of businesses
82% of community members
- Perceived lack of affordable housing for essential service providers

Challenges: ENVIRONMENTAL



! Environmental

- Sustainable waste management policy
- Recycling policy – single-use plastic and agricultural wastewater
- Minimise the pollution resulting from cruise ship emissions in the caldera
- Reduce water consumption and conserve energy, or increase supply
- Animal welfare: international media reports on treatment of donkeys

Challenges: INFRASTRUCTURE



! Arrival & Welcome

Improve access on arrival to Santorini:

- By air
airport capacity, facilities and experience
- By sea
cable car, Athinios Old Port, possible new port

Cruise visitor management:

- Enforce limits?
- Separate excursion from Fira-only pax?
- New port?

! Infrastructure

- No shade at Fira or Athinios, toilet facilities
- Parking and bus access
Athinios
- Road safety at congested / popular locations
e.g. Profitis Ilias

Challenges: VISITOR EXPERIENCE



! Signage

- Directional signage
variable
- Commercial signage
mismatched, intrusive

! 'Sense of Place'

- Visitor-community segregation /
'tourism ghettos'
- 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 key sites / attractions

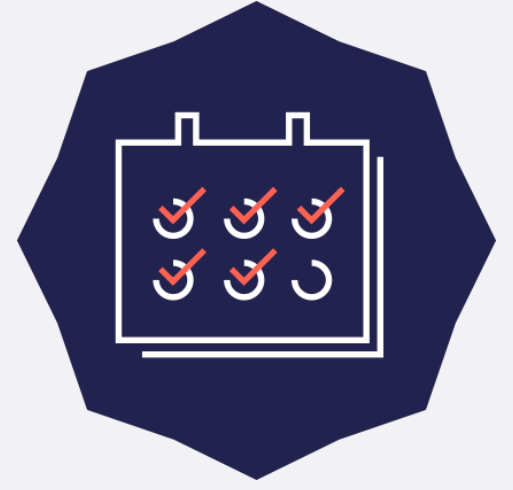
⚠ Guides

- Proliferation of non-registered guides undermines quality experience

⚠ Value for Money

- Questionable / poor VFM from visitor experience

Challenges: SEASONALITY



- 50% of local businesses would be interested in extending their period of opening, if there was sufficient business to justify it (but 18% 'no'; 31% 'not sure').
- 140 hotels stayed open during the winter of 2016/17 as part of a program to increase off season business.
- Limited/no direct air services from best prospect markets outside main season

Challenges: BRAND IMAGE



⚠ Risk to Long-term Business, if Issues not Addressed

⚠ Main competitors

- Mykonos
- Turkish coast
- Canary Islands
- Other Cyclades islands

Challenges:
POLITICAL, LEGAL
AND SOCIAL



- ⚠ Law enforcement
- ⚠ Vineyard destruction
- ⚠ Fragmented land ownership
agricultural development and road
improvement
- ⚠ House prices
- ⚠ Uncontrolled sprawl
- ⚠ Landscape erosion
- ⚠ Living costs

Challenges: DISSATISFACTION



! Dissatisfaction

with way tourism is developing
in Santorini

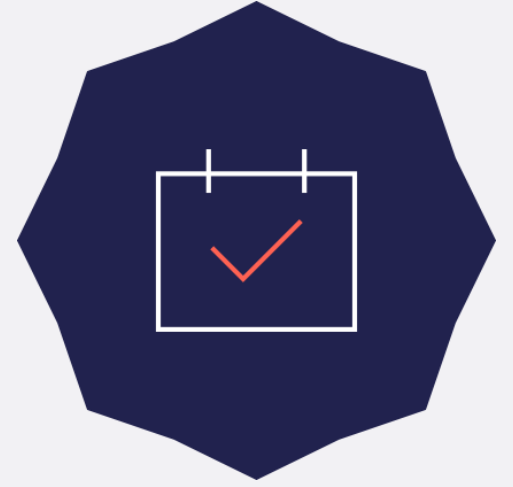
Businesses

80%

Communities

87%

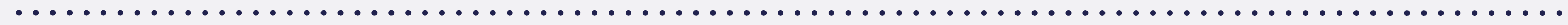
Challenges: FUTURE PRIORITIES



✓ Consensus among businesses and communities on:

- Improve infrastructure
- Improve preservation of cultural heritage
- Improve preservation of natural heritage
- Improve heritage interpretation
- Establish restrictions for new tourism accommodation establishments and for short-term rentals
- Improve the provision of information to tourists
- Increase/enhance training and lifelong learning programs at local level
- Establish a mechanism to measure and monitor tourism

Challenges: "IN A NUTSHELL"



⚠️ "An outstandingly beautiful island
born in (volcanic) anger.....

.....threatened by love"

EU Parliament Warns Unregulated Tourism May 'Hurt' Santorini

Posted On 21 Jan 2019 By : GTP editing team Comment: 0



Home > Destinations news > EU Parliament Warns Unregulated Tourism May 'Hurt' Santorini



Santorini, Greece

A European Parliament report focusing on the impact of overtourism on EU destinations is warning that **if tourism flows continue to increase and remain unregulated, the popular Greek island of Santorini will suffer dire consequences.**

D

SANTORINI 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 Santorini through the development of tourism, in a way that is economically, socio-culturally and environmentally sustainable and valued by residents".



VISION FOR SANTORINI BY 2030

*"An exclusive, **paradise island**, recognised globally as a **leader in sustainable tourism management**, where **tourism and agriculture** underpin a successful, **sustainable economy** and **vibrant community life**, and contribute to the conservation of its **cultural heritage** and **natural environment**".*



High-Level Objectives

To be Achieved by 2030

1 **Resolve the congestion** caused by overstretched port facilities, and pollution issues resulting from the lack of shore-based hook-up facilities for cruise ships, in the caldera.

2 Secure a more **balanced economy**, by enabling growth in the development of agriculture.

3 Become recognised as **a global leader in sustainable tourism management.**

4 Establish an image for Santorini as an **exclusive paradise island.**

5 **Extend the tourism season** and ensure that 75% of the tourism capacity is open for at least 9 months of the year.

E

SANTORINI 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.

Brand Image and Proposition

- 1 Primary brand characteristics**
 - **Romance**
 - **Gastronomy**
 - **Scenic beauty**
natural and man-made
 - **Volcanic character**
- 2 Supporting brand characteristics**
 - **Cultural heritage**
 - **Wellness**
future - aspirational
- 3 Emotional take-out**
 - **Indulgent and tranquil**
aspirational
 - **Relaxing and inspiring**

Brand Image and Proposition



Brand
proposition:

**Island of
romantic
gastronomy**



Brand Narrative Themes



Romantic Escape



Beauty
Born in Anger



Ancient Home
of Gastronomy

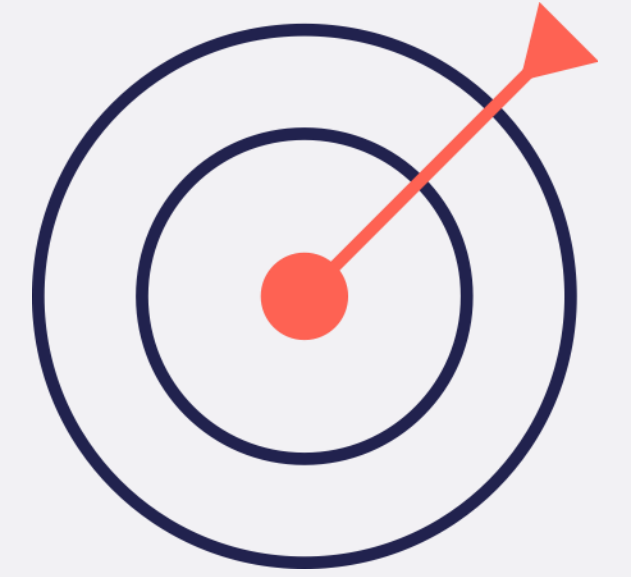


Indulgent Luxury /
Sybaritic Pleasure



Hidden history

Target Markets RATIONALE



Value

Current and future potential value

volume x spend x repeat visit propensity



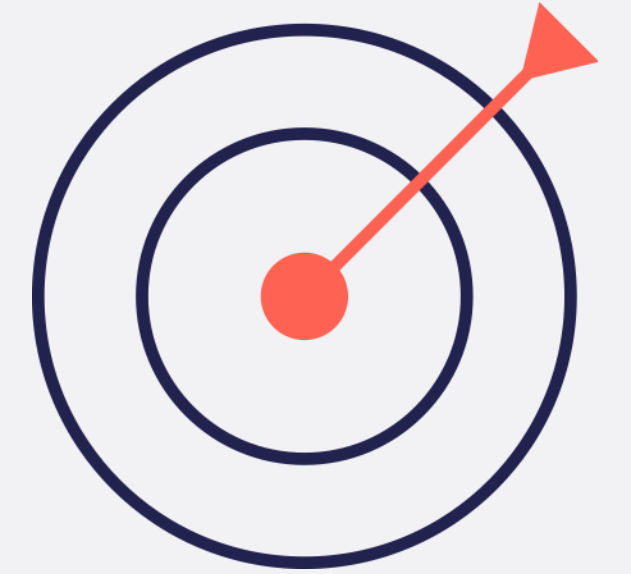
Sustainability

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

PRIMARY AND SECONDARY



1 Primary Potential

"Romantic escapers / honeymooners"

from Italy and UK, followed by France, Germany, Switzerland, Austria, Netherlands and Spain

"Foodies"

from USA, Italy and UK, followed by France, Germany, Switzerland, Austria and Netherlands

2 Secondary Potential

"Cruise visitors"

- Mainly 'empty-nester' couples from UK and USA
- Plus groups of friends from USA and other European countries

3 Tertiary Potential

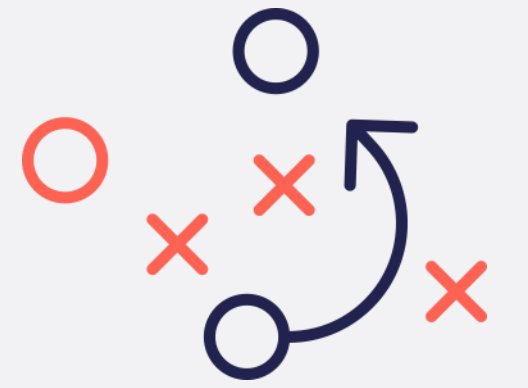
"Sybarites"

- From USA, Italy, UK, France and Russia
- Subject to future development of luxury spa and gastronomic experiences

Strategic Priorities

— 6 STRATEGIC PRIORITIES

— 176 ACTIONS



1 Making Santorini **sustainable** for the decades to come
47 actions

2 Managing tourism to ensure residents' **quality of life** and quality of **visitor experience** – ensuring that these match the brand
43 actions

3 Conserving the quality of Santorini's **built and natural environment**
11 actions

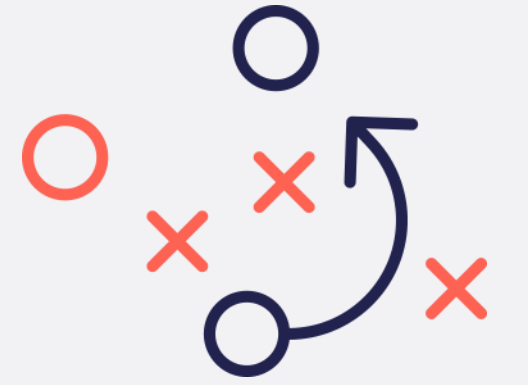
4 Ensuring Santorini achieves **optimum value** from tourism
15 actions

5 Developing **new experiences** for the off-season, providing a model for attracting higher revenue summer tourism
12 actions

6 Enhancing the **brand**
16 actions

Strategic Priorities

— PLUS



+ Crisis preparedness and civil protection
10 actions

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

E SANTORINI DMP – HOW DO WE GET THERE? STRATEGIC PRIORITIES AND ACTION PLAN



- SP1** - Making Santorini sustainable
- SP2** - Quality of life and visitor experience
- SP3** - Built and natural environment
- SP4** - Optimising benefits of tourism
- SP5** - Extending the season
- SP6** - Enhancing the brand

+ Crisis Preparedness / Business Support, Industry Training
Research & Intelligence / Performance Monitoring & Measurement

F

SANTORINI DESTINATION MANAGEMENT PLANNING

SELECTED ACTIONS



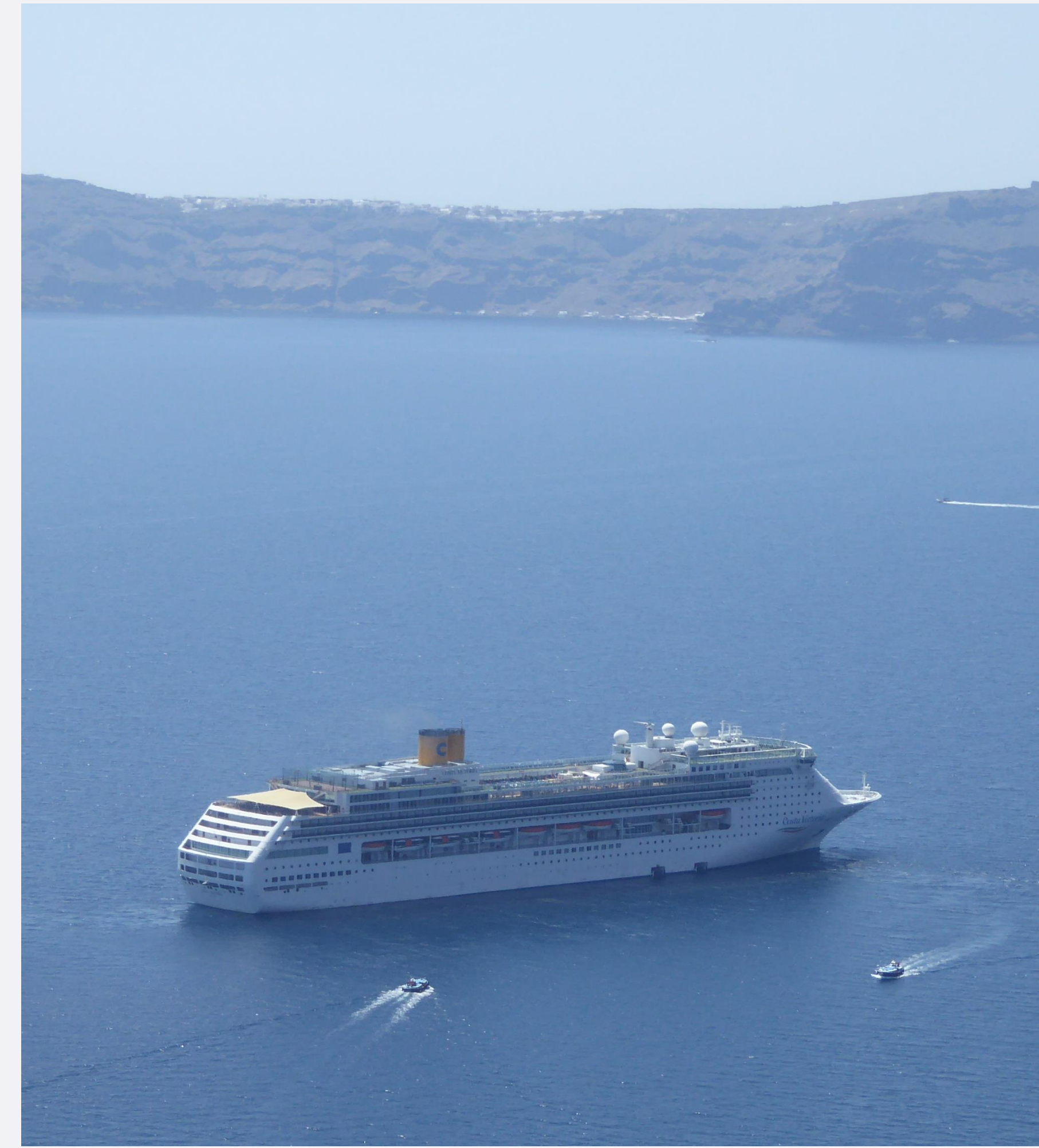
Strategic Priority #1

Making Santorini Sustainable For the Decades to Come



✔ Manage visitor numbers in line with carrying capacity

- Commission assessment of island's **carrying capacity**
- Create local **register** of capacity of tourism suppliers
- **Cruise ship management**, in consultation with cruise lines:
 - Limit number per day
 - Stagger arrivals
 - Visitor disembarkation quota
 - Consider cruise passenger levy



Strategic Priority #1

Making Santorini Sustainable For the Decades to Come (cont.)



✔ Manage visitor numbers in line with carrying capacity

- Stagger **airline arrival and departure slots** at peak times
- Introduce and enforce **'park and walk'** systems at Oia and Fira
- Develop **multi-modal transport hub** to service seaborne excursion and visitors renting vehicles + shuttle buses



Strategic Priority #1 EXAMPLE: DUBROVNIK

Making Santorini Sustainable For the Decades to Come (cont.)



✔ Manage visitor numbers in line with carrying capacity

- 3 cruise ships p. day: 2 morning, 1 after 12.00 hrs
- 4,000 passengers ashore p. day (2020)
- €2 cruise passenger levy (2021)



Strategic Priority #1

Making Santorini Sustainable For the Decades to Come (cont.)



✓ Sustainable environmental practice

- Monitor **air and water** pollution
- Introduce and enforce **cruise ship environmental controls**:
 - Agree target for percentage of cruise ships entering caldera to be powered by liquefied natural gas (LNG)
 - Agree target date for all cruise ships entering caldera to have exhaust gas cleaning systems (EGCS) and advanced wastewater treatment systems (AWTS)
 - Agree inspection program and reporting requirements by cruise lines
 - Apply differentiated tariffs for cruise ships with good/bad environmental performance (e.g. LNG-powered, EGCS and AWTS systems etc.)



Strategic Priority #1

Making Santorini Sustainable For the Decades to Come (cont.)



✔ Sustainable environmental practice

- Develop **guide and training course** on sustainable practices for all tourism operators
- **Waste management** system:
 - Recycling of household and business waste
 - Address landfill issues: capacity and unsightliness
- Introduce/expand systems for recycling 'clean' industrial waste-water in industrial/agricultural processes (e.g. vineyards)
- Clear litter regularly from roadsides, particularly in the main season
- Introduce ban on discretionary single-use plastic items.



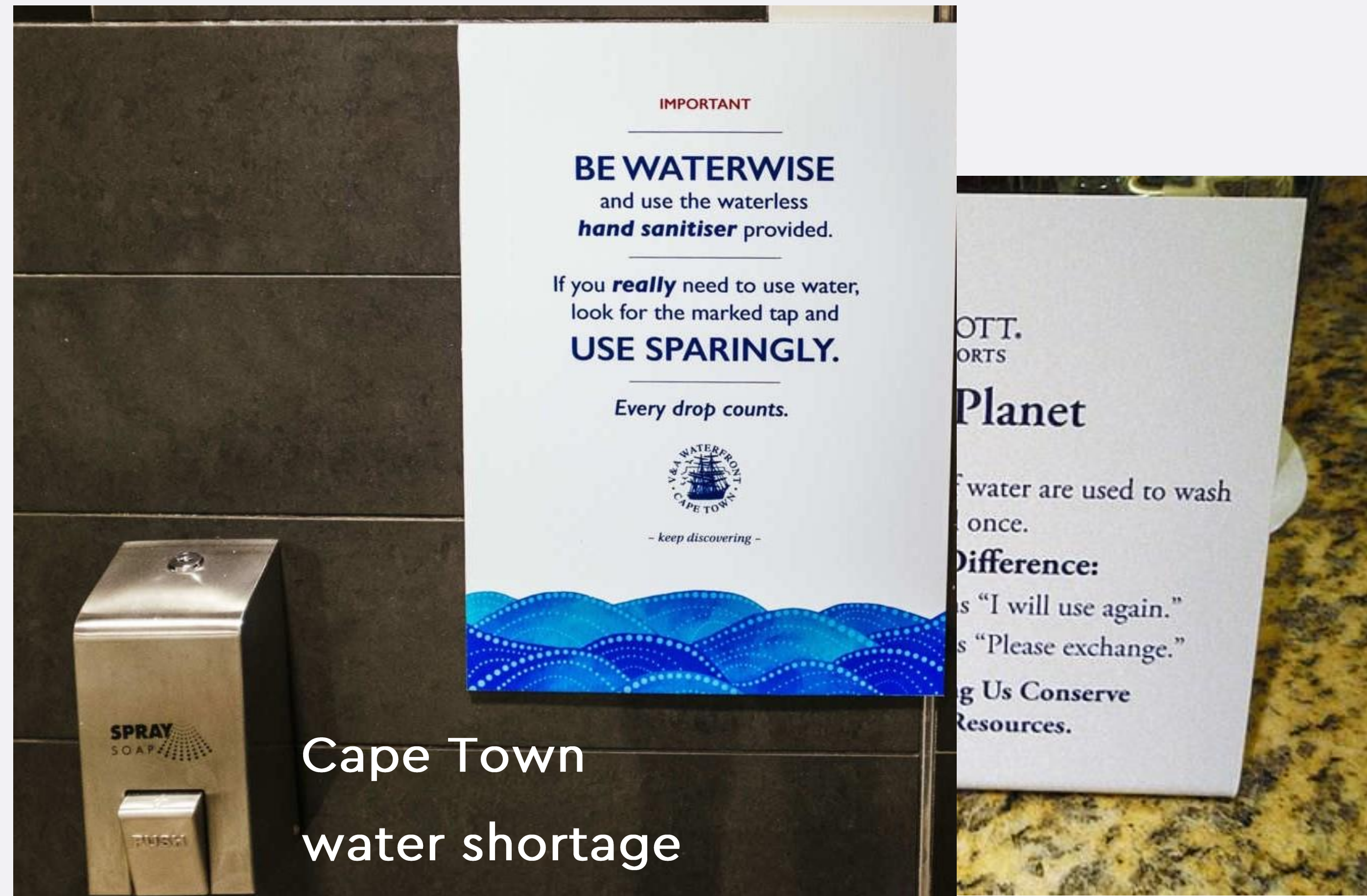
Strategic Priority #1

Making Santorini Sustainable For the Decades to Come (cont.)



✔ Sustainable environmental practice

- **Visitor awareness campaign** – to reduce water and energy consumption and waste:
 - At key visitor 'touchpoints'
 - "Keep Santorini tidy" campaign - main season
- **Carbon-neutral status** for Santorini by (TBA):



Cape Town
water shortage

Strategic Priority #1

Making Santorini Sustainable For the Decades to Come (cont.)



✔ Strengthen communities

- Undertake annual **residents' satisfaction surveys** to gauge residents' tolerance of visitor numbers and impact on their daily lives
- Agree **limits on short-term rentals** in residential neighbourhoods, and on rental periods, esp. for entire units and multiple properties in single business ownership
- Ensure availability of **affordable housing** for residents, and that demand for visitor accommodation does not price residents out of the housing market
- Ensure availability of decent **accommodation for seasonal workers**
- Creation and enforcement of **parking areas** on the edge of towns and villages

Strategic Priority #1 Example: Short-Term Rental Controls

Making Santorini Sustainable For the Decades to Come (cont.)



✓ Strengthen communities

- Mallorca: short-term rentals banned
- New York: rentals not permitted for less than 30 days
- Amsterdam: 30 days p.a. – 4 adults max
- Reykjavik, Berlin, London: 90 days p.a. max
- San Francisco: 90 days p.a. max – permanent residents/owners only
- Paris, Los Angeles: 120 days p.a. max

4 Δεκεμβρίου 2017 ΤΕΥΧΟΣ ΔΕΥΤΕΡΟ Αρ. Φύλλου 4232

ΕΦΗΜΕΡΙΔΑ
ΤΗΣ ΚΥΒΕΡΝΗΣΕΩΣ
ΤΗΣ ΕΛΛΗΝΙΚΗΣ ΔΗΜΟΚΡΑΤΙΑΣ

ΠΕΡΙΕΧΟΜΕΝΑ
ΑΠΟΦΑΣΕΙΣ

1	Βραχυχρόνια μίσθωση ακινήτων στο πλαίσιο της οικονομίας του διαμοιρασμού.	
2	Ανώτατο όριο επιτρεπόμενων ημερών κίνησης εκτός έδρας υπαλλήλων υπηρετούντων στο ΝΠΔΔ «ΚΟΙΝΩ.ΠΟΛΙΤ.Α.» Ιεράπετρας για το έτος 2018.	
3	Τροποποίηση της με ΑΠ οικ. 51879/1137/Π12/ 5/00094/Ε/ν.3299/2004/25.09.2017 απόφασης Περιφερειάρχη Βορείου Αιγαίου περί ολοκλήρωσης της επένδυσης και πιστοποίησης έναρξης της παραγωγικής λειτουργίας του «ΑΓΡΟΤΙΚΟΥ ΣΥΝΕΤΑΙΡΙΣΜΟΥ ΑΚΡΑΣΙΟΥ» ως προς την επωνυμία του.	
4	Υπερωρίες προσωπικού για το 1ο εξάμηνο του έτους 2018.	

ΑΡΙΘΜ. ΠΟΛ : 1187 (1)
Βραχυχρόνια μίσθωση ακινήτων στο πλαίσιο της οικονομίας του διαμοιρασμού.

Ο ΔΙΟΙΚΗΤΗΣ ΤΗΣ ΑΝΕΞΑΡΤΗΤΗΣ ΑΡΧΗΣ ΔΗΜΟΣΙΩΝ ΕΣΟΔΩΝ

Έχοντας υπόψη:

ζ) των άρθρων 1 έως 4 του ν. 4276/2014 (ΦΕΚ 155 Α'/30.07.2014) και της παραγράφου 5 του άρθρου 46 του ν. 4179/2013 (ΦΕΚ 175 Α'/8.08.2013), η) της αριθ. Δ. ΟΡΓ. Α 1036960 ΕΞ 2017/10.03.2017 (ΦΕΚ 968 Β'/22.03.2017) απόφασης του Διοικητή της Ανεξάρτητης Αρχής Δημοσίων Εσόδων «Οργανισμός της Ανεξάρτητης Αρχής Δημοσίων Εσόδων (Α.Α.Δ.Ε.)». 2. Τις διατάξεις της αριθ. Δ6Α 1015213 ΕΞ 2013/28.1.2013 (ΦΕΚ 130 και 372 Β') κοινής απόφασης του Υπουργού και του Υφυπουργού Οικονομικών «Μεταβίβαση αρμοδιοτήτων στον Γενικό Γραμματέα της Γενικής Γραμματείας Δημοσίων Εσόδων του Υπουργείου Οικονομικών», όπως ισχύει, σε συνδυασμό με τις διατάξεις της παραγράφου 10 του άρθρου 41 του ν. 4389/2016, όπως ισχύουν. 3. Την αριθ. 1/20.01.2016 (ΦΕΚ 18/Υ.Ο.Δ.Δ./20.01.2016) πράξη του Υπουργικού Συμβουλίου «Επιλογή και διορισμός Γενικού Γραμματέα της Γενικής Γραμματείας Δημοσίων Εσόδων του Υπουργείου Οικονομικών», σε συνδυασμό με τις διατάξεις του πρώτου εδαφίου της παραγράφου 10 του άρθρου 41 του ν. 4389/2016, όπως ισχύουν. 4. Την Δ.ΟΡΓ.Α 1115805 ΕΞ 2017/31-07-2017 (2743 Β') απόφαση του Διοικητή της Ανεξάρτητης Αρχής Δημοσίων Εσόδων «Μεταβίβαση αρμοδιοτήτων και εξουσιοδότηση υπογραφής "Με εντολή Διοικητή" σε όργανα της Φορολογικής Διοίκησης». 5. Την ανάγκη ρύθμισης και φορολογικής μεταχείρισης των βραχυχρόνιων μισθώσεων ακινήτων στο πλαίσιο της

Strategic Priority #1

Making Santorini Sustainable For the Decades to Come (cont.)



✔ Infrastructure development

- Review options for **new port** development, incl. shore-based power hook-up for cruise ships
- Improve **road infrastructure**:
 - To improve safety (e.g. Profitis Ilias)
 - To manage congestion, esp. around key attractions and popular sites (Accessibility Study for the Cultural Route of Santorini)



Strategic Priority #2

Managing Tourism to Ensure Quality of Life and of Visitor Experience
– Ensuring That These Match the Brand



✔ Information, interpretation and welcome

- Erect airport **arrival welcome signage** and artworks to convey 'sense of place'
- Undertake **signage review**:
 - Accurate tourism and directional signage
 - Removal of illegal and misleading signage
 - Develop tastefully designed interpretive signage for visitor attractions, trails and facilities
- Improve **interpretation** at key sites, using imaginative, modern techniques e.g. Akrotiri, Ancient Thira - panels, tableaux, video, holograms, AR / VR



Strategic Priority #2

Managing Tourism to Ensure Quality of Life and of Visitor Experience
– Ensuring That These Match the Brand (cont.)



✔ Visitor management

esp. Oia, Fira and popular attractions

- Extend and enforce **'pedestrian only'** and **'no parking'** zones
- Mount **vehicle/passenger barrier** to refuse entry to non-ticketed vehicles/passengers
- Review **vehicular access** to certain areas of Oia for tourist related-activities
- Create **drop-off zones** for coaches



Strategic Priority #2

Managing Tourism to Ensure Quality of Life and of Visitor Experience
– Ensuring That These Match the Brand (cont.)



✔ Visitor management

esp. Oia, Fira and popular attractions

- Introduce **ticketed entry** at peak periods, to be purchased in advance
- Develop **mobile app**, with real-time information on traffic/passenger volumes, including booking facility to stimulate dynamic time-based dispersal
- Set **timeslots** for group access to popular attractions and/or events aided by real-time monitoring



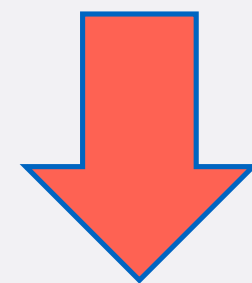
Strategic Priority #2: Example of Pedestrianisation

Managing Tourism to Ensure Quality of Life and of Visitor Experience
– Ensuring That These Match the Brand (cont.)



✓ Pontevedra, Spain – “Car-Free City”

- 14,000 cars p. day, city centre dead, congestion, pollution, accidents



- All 300,000 sq m of the medieval centre pedestrianised
- Surface car parks in city centre closed & 1,686 free places opened in underground ones and on the periphery



Strategic Priority #2: Example of Pedestrianisation

Managing Tourism to Ensure Quality of Life and of Visitor Experience
– Ensuring That These Match the Brand (cont.)



✓ Pontevedra, Spain – “Car-Free City” – Key Achievements

- CO2 emissions down 70%
- 1996-2006: from 30 to 3 deaths, none since 2009
- + 12,000 new inhabitants
- Small businesses flourishing



Strategic Priority #2

Managing Tourism to Ensure Quality of Life and of Visitor Experience
– Ensuring That These Match the Brand (cont.)



✓ Professional tourist guiding standards and regulations

- Review current **guiding standards** - certification
- Attract / train **German-speaking** guides
- Agree procedure relating to **other foreign language** guiding requirements



Strategic Priority #3

Maintaining the Quality of Santorini's Built and Natural Environment



✓ Land use planning

- **Zone areas** for agricultural, tourism, other business and residential uses
- Consider **incentives** for the expansion of productive agricultural land
- Limit numbers of **new accommodation** establishments



✓ Natural environment and built heritage conservation

- Review and, where necessary, update **planning and design guidance** and permissions required
- Develop/apply **protected designations** for outstanding or important natural environmental areas and built heritage

Strategic Priority #4

Optimising the Benefits of Tourism



✓ Market focus and aspiration

- Support long-term aspiration as an **exclusive destination** by attracting appropriate investment and targeting high-yield markets

✓ Community engagement

- Work with **local 'champions'** in villages to ensure tourism is sustainable
- Develop **authentic tourism experiences** that engage both residents and visitors

✓ Cross-sectoral synergies

- Ensure strong **links** between local producers and tourism operators
- Develop a distinctive **brand identity** for all Santorini products
- Establish **outlets** (e.g. in Fira and airport) for Santorini produce and products

Strategic Priority #4 Example: Tobago

Optimising the Benefits of Tourism



✔ "Adopt-a-Farmer" Scheme

- Aim: To improve linkages between agriculture and tourism
- Local hotels/restaurants teamed up with individual farmers
- Hotel/restaurant agrees to buy produce at guaranteed price = reliable income
- Local cuisine for visitors – adds to 'sense of place'



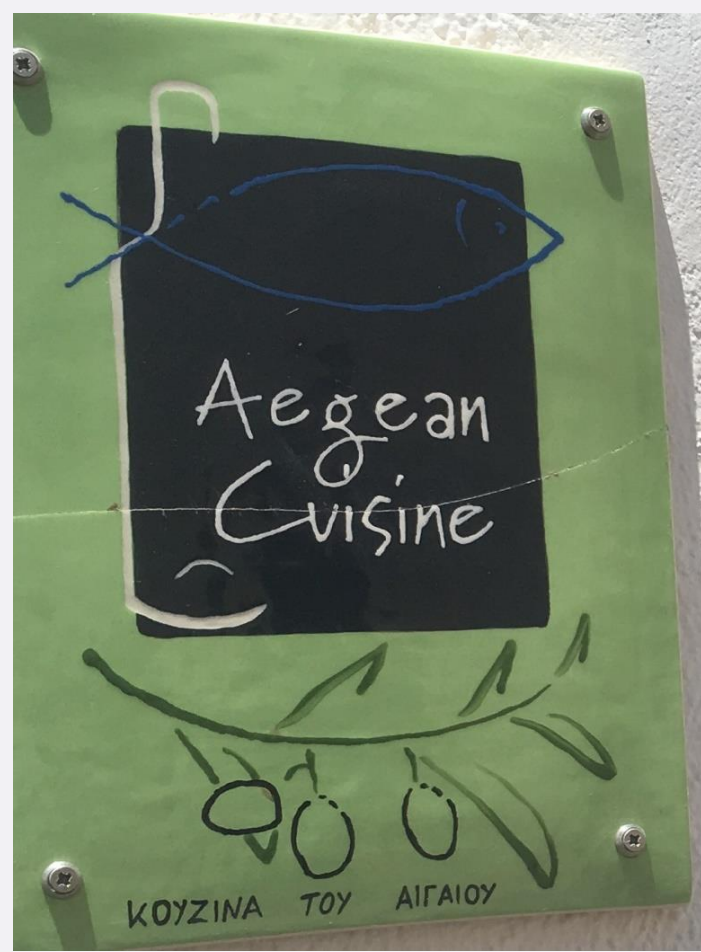
Strategic Priority #5

Extending the Season – new experiences for the off-season, providing a model for attracting higher revenue summer tourism



✓ New experiences

- Attract **luxury spa**
- Develop **agri-tourism** experiences
- Educational / self-development **courses / retreats**
e.g. painting, yoga et al
- Sporting **events**
cf. 'Santorini Experience'



✓ Develop Santorini's cultural offer

- **Events, festivals**
e.g. gastronomy, wine, olive-harvesting, walking, culture
- 'Santorini Cultural Route'
- 'Artist-in-residence', 'writer-in-residence' et al
- Santorini-specific storytelling experiences
e.g. local history / mythology / culture

Strategic Priority #5 Example: Istria

Extending the Season – new experiences for the off-season, providing a model for attracting higher revenue summer tourism (cont.)



✓ Istria, Croatia

- Gourmet Tourism Product Development
- 8 "Roads": wine roads, olive oil roads
- Gourmet Festival: restaurants + producers
- DMO-run
- 7 new wineries, 117 wine makers
- 137 olive growers
- 150,000 visitors p.a.



Strategic Priority #5 Example: Marche, Italy

Extending the Season – new experiences for the off-season, providing a model for attracting higher revenue summer tourism (cont.)



✓ “Le Marche in Valigia”, Italy

- Promotional focus - international
- Part of Italy's Agritur-Aso Association
- Farmhouses, B&Bs, country houses
- Historical introduction
- Pasta-making workshops, olive oil tastings etc.
- Meal – local food



Strategic Priority #5

Extending the Season – new experiences for the off-season, providing a model for attracting higher revenue summer tourism (cont.)



✔ Pilot off-season campaign

- Create **prestige packages** involving top hotels, restaurateurs, wine producers, wellness product providers, using Santorini brand
- Work with an **airline** to extend season at edges
- Run pilot **promotional campaign**, in 1-2 best prospect markets, subject to airlift



Strategic Priority #6

Enhancing the Brand



✔ Brand image

- Develop products and experiences with romantic evocations / in romantic locations



- Develop local **gastronomic** products and experiences
e.g. work with Aegean Cuisine brand; gastronomy festival etc.
- Develop products and experiences rooted in local **cultural** heritage
- Attract **luxury spa** investment

Strategic Priority #6

Enhancing the Brand (cont.)

✓ Brand image

- Feature wine (Assyrtiko) and other locally unique/specific **products** (e.g. white aubergines, cherry tomatoes and fava beans) marketing communications to support Santorini's gastronomic brand value



- Establish a reputation for Santorini as **leader in sustainable tourism management**, through application of sustainability measures outlined above
- **Thirassia:**
 - Explore Thirassia residents' views on further (sensitive) development
 - Review potential for exclusive, boutique, 'romantic hideaway' development

Strategic Priority #6

Enhancing the Brand (cont.)



✔ Brand communications

- Design a Santorini **visual brand identity**– for all businesses and local organisations, reflecting the island's 'sense of place'
- Develop **brand identity guidelines** and signage protocol/technical design application
- Develop **brand communications plan** and train stakeholders in applying the brand

THIS IS
ATHENS!

THIS IS MY
ATHENS!
— CITY OF ATHENS OFFICIAL
VISITOR GREETERS PROGRAM

1

THIS IS
ATHENS!
— WALKS & TOURS

2

THIS IS
ATHENS!
— INFO POINTS

3

THIS IS
ATHENS!
— CITY PASS

4

THIS IS
ATHENS!
— OFFICIAL TOURIST
SOUVENIRS

5

THIS IS
ATHENS!
— DESTINATION SPECIALIST
PROGRAM

6

Crisis Preparedness / Civil Protection



✓ Legal framework for crisis response

- Review and update

✓ Operational framework for emergency response

- Review and update 'first responder' protocols.
- Develop training programme with responsibilities for action
- Explore exchange of best practice

✓ Crisis management plan

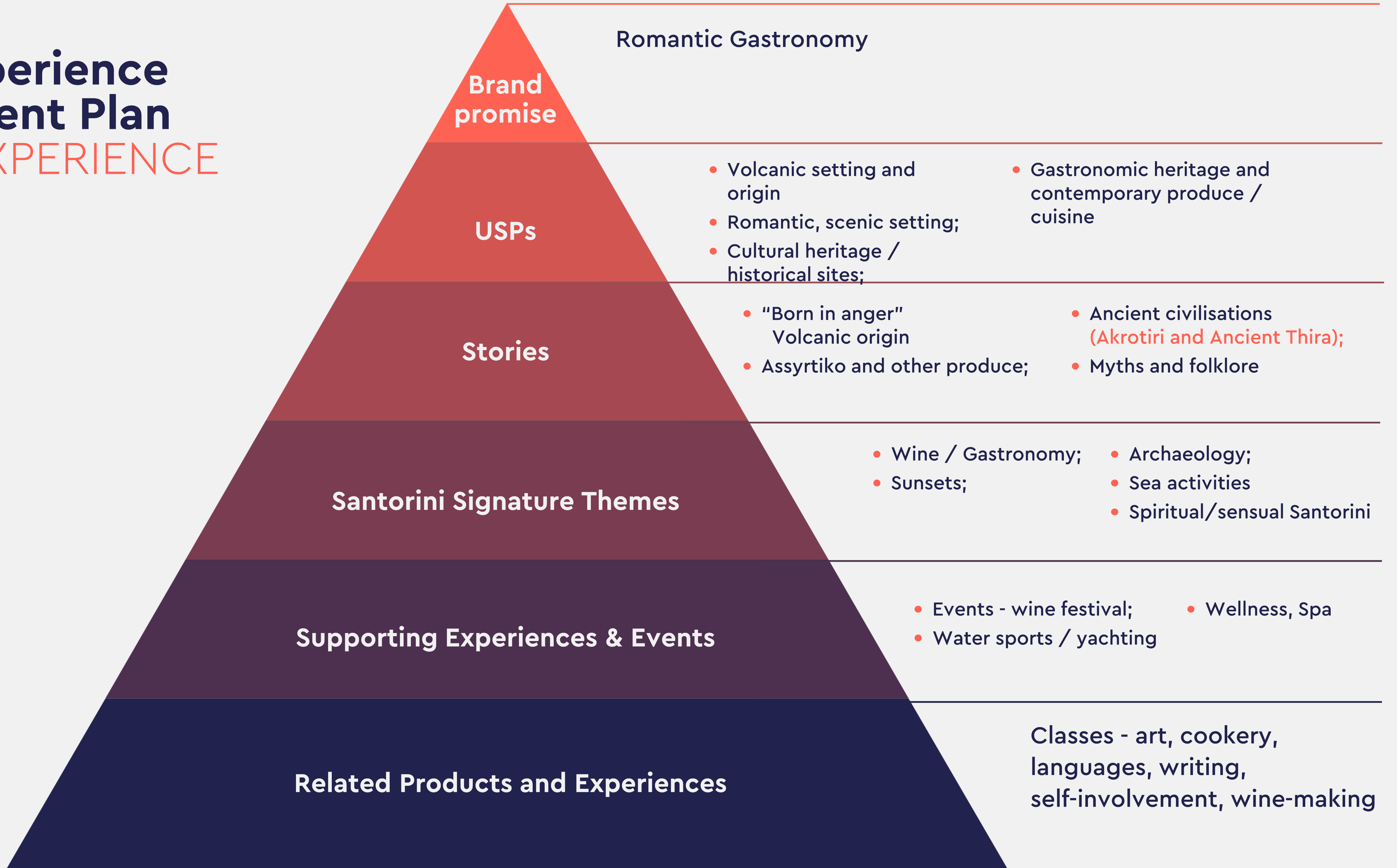
- Develop crisis management and communications plan with responsibilities
- Explore exchange of best practice

✓ Crisis recovery plan

- Identify people responsible for key elements of crisis recovery
- Explore exchange of best practice

Visitor Experience Development Plan

VISITOR EXPERIENCE PYRAMID



Visitor Experience Development Plan

5 SIGNATURE THEMES



The Best of Santorini
Wine and Gastronomy



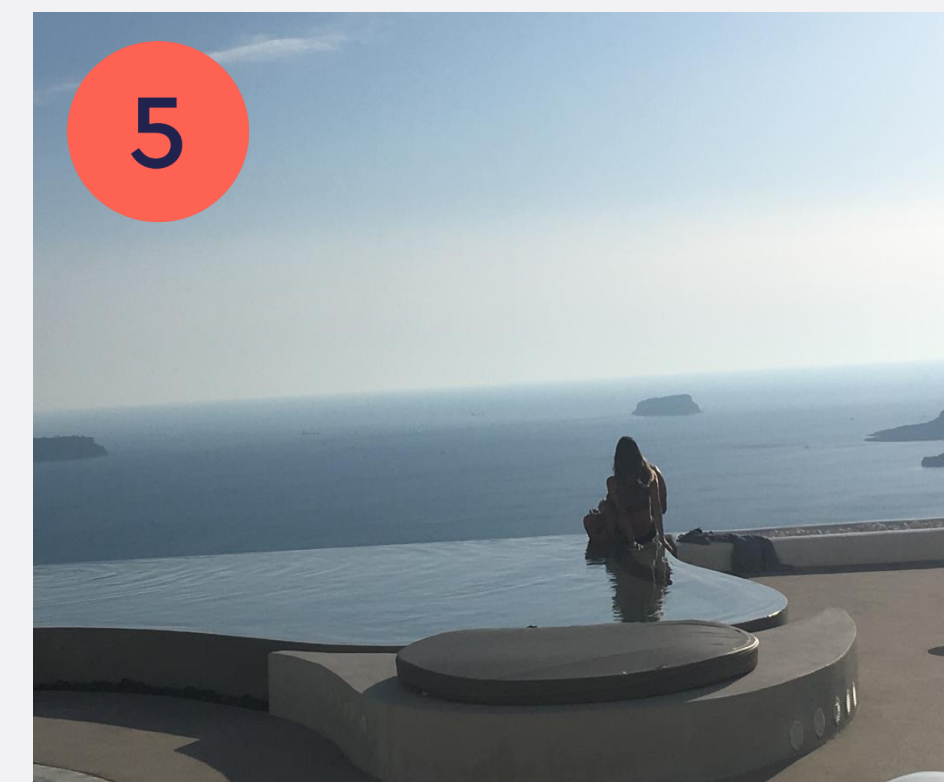
Santorini at Sunset



Archaeological
Wonders of Santorini



Santorini
from the Sea



Spiritual-Sensual
Santorini

Marketing Plan

4 GUIDING PRINCIPLES



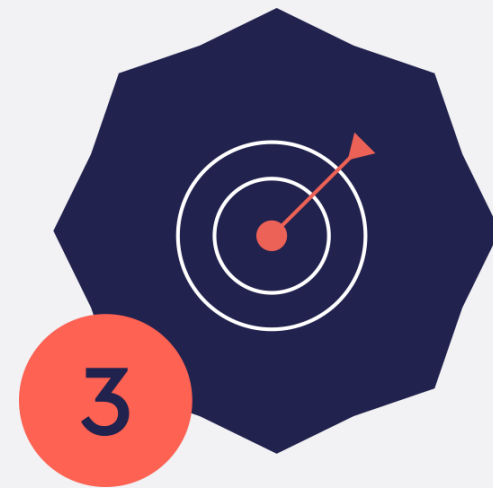
Sustainability

Focus on attracting visitors who will contribute most and impact least



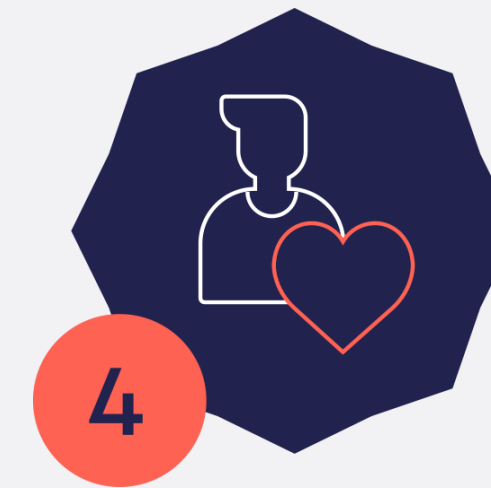
Cost-effectiveness

Need to achieve maximum impact with limited resources



Targeted marketing

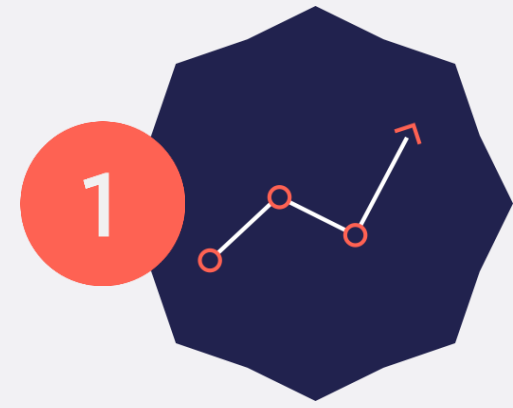
Marketing should not be spread too thinly and should focus on a limited range of the best prospects for Santorini.



Product-market fit

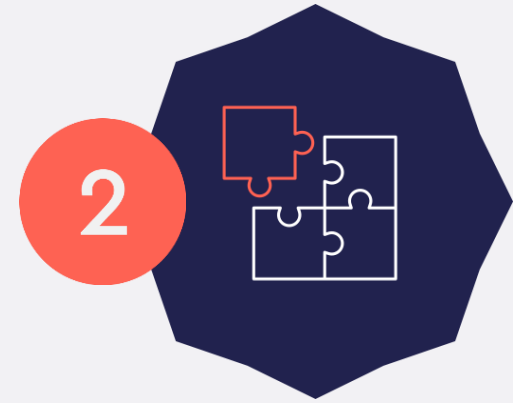
Focus on those who would most appreciate Santorini's range of appeals and therefore be likely to stay longer and spend more, rather than on short stay, lower-spending "Instagram" visitors.

Marketing Plan:



Priority #1 "INVEST AND GROW"

Years 1-5 ongoing



Priority #2 "PERSUADE AND BUILD" – OFF-SEASON"

Years 1-2: development; years 3-5 marketing



Priority #3: "MAXIMISE REVENUE / MINIMISE IMPACT"

Years 1-5 ongoing



Priority #4: "LONG-TERM FUTURE DEVELOPMENT"

Year 3 onwards

Marketing Tactics

✔ Consumer

- Website
- Inclusion in Greek National Tourism Office (GNTO) materials
- Social media campaigns
- Public relations (PR)



Marketing Tactics

✔ Travel trade

- Work with GNTTO offices and PR agencies
- Work with airlines, overseas tour operators and inbound tourism operators
- Trade fairs: GNTTO, 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
- Use ambassadors reflective of target market profile
- Develop, implement and maintain an online trip-planning tool, with an events calendar



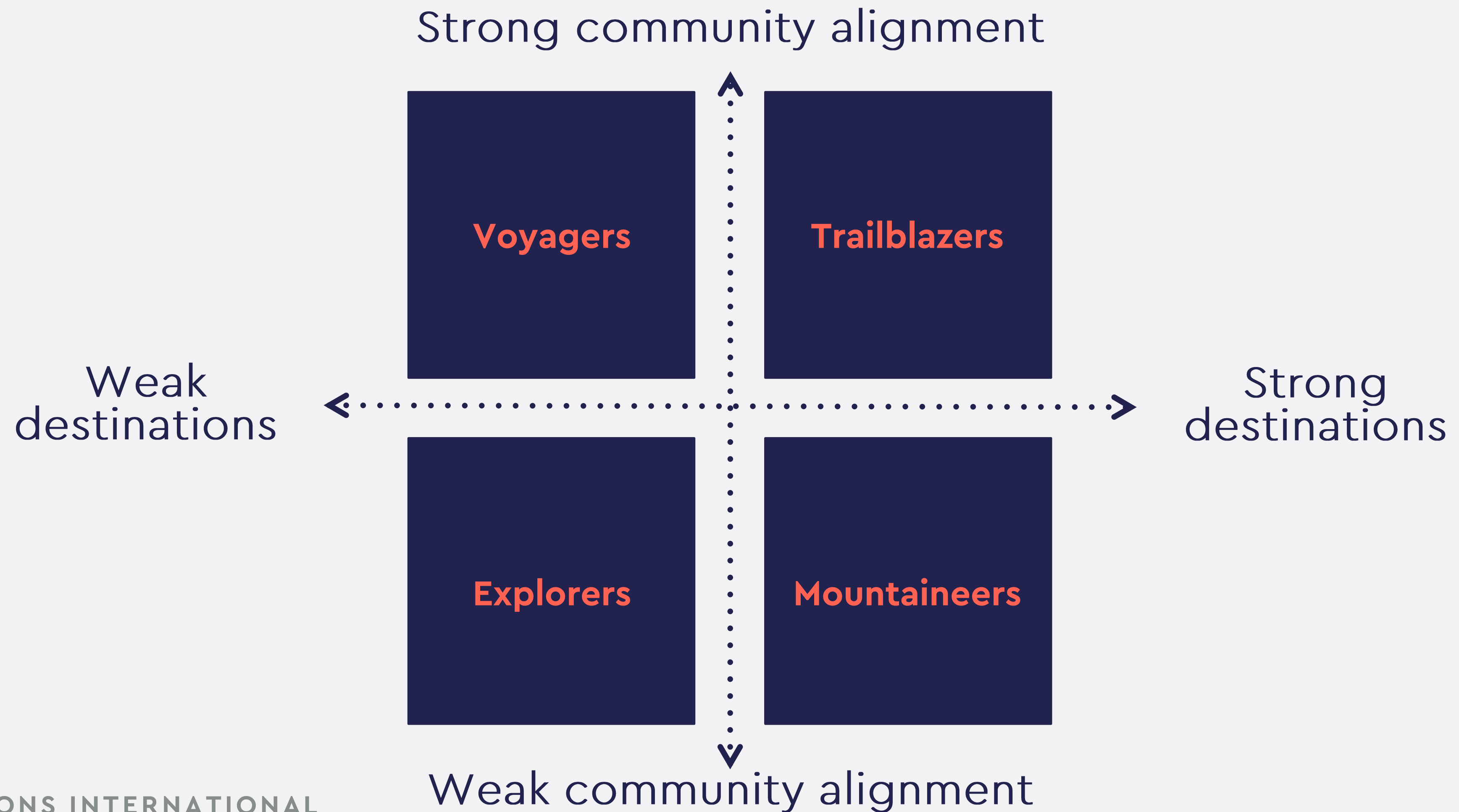
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GOVERNANCE AND FUNDING

The Governance And Funding Of Destination Management

Synergies, the Vehicle for Effective Governance



The Governance and Funding of Destination Management

Synergies, the Vehicle for Effective Governance

- Private sector initiatives require a rather high level of consensus and commitment among different businesses along with capital contributions by all partners on a regular basis.
- Developing suitable destination management solutions would be also difficult without the public sector's active involvement.
- For public sector initiatives, government funding is often limited at the local level and the deployment of revenues from relevant taxes (e.g. bed tax, room-stayover tax) is not tied to tourism-related projects at respective destinations.

Scenario #1 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)
- **Local Level:**
Amendments to the framework on Development Companies
(Law 3463/2006 as amended by Law 3852/2010 and Law 4555/2018)
- **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)]

Scenario #1 Creation of an Entity by One or More, Public and/or Private Sector Stakeholder

Scenario 1 Assessment



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

Scenario #2 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

- Geothira Sole Shareholder S.A: This type of municipal company is not allowed to sign programmatic agreements
- Lack of a Directorate of Tourism under the Municipality
- Termination of the activity of the non-profit Cyclades Progress & Development Organization

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 mobilizing domestic and EU funds.
- The Region would then work closely with the Municipality of Santorini and local stakeholders on selected actions.

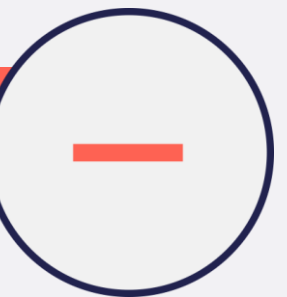
Scenario #2 Allocation of Responsibilities for Implementing the DMP to an Existing Organisation

Scenario 2 Assessment



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 #3 Establishment of a Lighter and More Flexible Governance Structure

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

THIS
IS **ATHENS**
& PARTNERS



Scenario #3 Establishment of a Lighter and More Flexible Governance Structure

Good Governance Arrangements (a)

- A 'Memorandum of Understanding and Cooperation' to define:
 - The scope and terms of the partnership
 - The key activities that each founding partner (e.g. the Municipality of Santorini, the Region of South Aegean and the Cyclades Chamber) would undertake,
 - Their fixed amounts of annual contributions for an agreed period
 - All obligations and benefits associated with being a founding partner;
- An Executive Board, which would ensure the DMP's implementation through its decision-making capacity and the supervision of all activities undertaken under the partnership umbrella.
- A Steering Committee, which would coordinate day-to-day activities and the sound management of financial and human resources, in order to deliver the Executive Board's decisions.

Scenario #3 Establishment of a Lighter and More Flexible Governance Structure

Good Governance Arrangements (b)

- A team of dedicated experts including both new recruiters (being employed by one of the founding partners) and existing staff members from one or more founding partners to support the DMP's implementation.
- A second level of partnership members to expand the private sector's active involvement in the scheme based on lighter terms of engagement and the same principles of a high level of consensus, corporate ethics, and trust.
- Framework of funding sources and fundraising options/processes.

Scenario #3 Establishment of a Lighter and More Flexible Governance Structure

Scenario 3 Assessment

+	-
<ul style="list-style-type: none">• 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.	<ul style="list-style-type: none">• 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.

H



CRITICAL SUCCESS FACTORS &
DISCUSSION

Critical Success Factors

1

Collaboration: Effective collaboration between major stakeholders, especially between businesses and public bodies at local, regional, national and, where appropriate, international, levels.

2

Residents as participants: Understanding by residents of the value of sustainable tourism to Santorini and their commitment to ensure it is developed sustainably.

3

Visitor flow management: Commitment to finding solutions to managing visitor flows, particularly in the main season.

4

Seasonal extension: Persuading the extension of direct air services from key markets and a critical mass of Santorini businesses to stay open into the off season.

5

Sustainable community: Commitment to finding solutions that deliver sustainable energy usage, waste management, and water consumption, plus sufficient availability of affordable housing

Critical Success Factors

6

Environment: Commitment to finding and implementing solutions that reduce pollution caused by cruise ship emissions, landfill and litter.

7

Infrastructure: Commitment to address infrastructure inadequacies, particularly airport, ports, roads and parking.

8

Visitor experience and sense of place: Commitment to improving the visitor experience and to a consistent projection, in both infrastructure and product/experience development as well as in marketing messages.

9

Resources: The ability to raise sufficient funding and deploy appropriately skilled human resources to address the issues identified in this DMP.

THANK
YOU!

TEAM / YELLOW RAILROAD / TOPOSOPHY