Guide to Destination Management Planning
for Destinations in Greece

European Bank
for Reconstruction and Development

List of Contents

Introduction

CONTEXT AND APPROACH TO DESTINATION MANAGEMENT PLANNING

1. Introduction – Context and Approach to Destination Management Planning

This section provides the context for this guide on destination management planning which has been prepared for destinations in Greece. It explains the concept and purpose of a destination management plan, refers to recent relevant trends in destination management and sets out the principles and approach that has been adopted in the guide.

1.1 Background and Purpose of this Guide

The European Bank for Reconstruction and Development (EBRD) and the Greek Ministry of Tourism take the view that effective destination management is essential to promote sustainable tourism. It is also vital to encourage Greek destinations to cultivate a common purpose among stakeholders, in order to manage tourism in a long-term and integrated way, with a focus on the needs not only of tourists but also of businesses and residents, as well as environmental conservation. It is seen as essential to address the generic challenges facing Greek tourism, notably to:

(i)   Increase the average spending of visitors;

(ii)   Lengthen the season;

(iii)   Implement sustainable practices, particularly where "over-tourism" risks becoming a concern.

Following discussions with the Ministry of Tourism, EBRD, with financial support from the EU, agreed to support development of the destination management concept in Greece by preparing destination management plans for Rhodes and Santorini and, learning from those, this guide to the preparation of such plans, to be used across Greece.

The aim of this guide is to clarify the role of destination management planning and set out a clear process for destinations throughout Greece to follow in developing their own destination management plans.

In drafting this Guide, we have drawn not only on the lessons learned in preparing pilot DMPs for Rhodes and Santorini, but also on existing guides or handbooks to destination management and to destination management planning, notably *'Principles for*

Developing Destination Management Plans' (Visit England), '*Destination Management Planning Toolkit*' for Iceland, '*Guide to Best Practice Destination Management*' (Australian Regional Tourism) and '*Tourism Destination Management Tool Kit*' (USAID); and on the experience of TEAM, Yellow Railroad and Toposophy in preparing DMPs (or similar strategic planning documents) for destinations in many countries across the world.

1.2 Destination Management as the Basis for Sustainable Tourism

Effective destination management (DM) is essential to ensure tourism is economically, socially and environmentally beneficial to a destination. This means optimising the benefits that tourism brings to a destination while minimising its negative impact, and thereby achieving a sustainable balance between the interests of visitors, residents, businesses, and the built and natural environments.

Achieving harmony between these four interests is the challenge of responsible, sustainable tourism, which is defined by the United Nations World Tourism Organization as: *"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"* [1]. With the exponential rise in global travel, fuelled by economic growth and social media, this is becoming an increasingly urgent challenge for destinations worldwide.

The starting point for effective destination management is destination management planning.

1.3 Destination Management Planning

Definition and Purpose of a Destination Management Plan

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

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[1] UNWTO (2015) [Sustainable Development of Tourism](#).

steps to achieve this. Quite simply, at its core, destination management planning is about people working together in a defined area to develop a plan, which satisfies visitor desires and delivers sustainable benefits for the community.

A **Destination Management Plan** (DMP) has been defined as "*a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources …. Crucially, destination management includes the planning, development and marketing of a destination as well as how it is managed physically, financially, operationally and in other ways.*"[2]

The same source goes on to say: *"Broadly, a Destination Management Plan is equivalent to a Strategy and Action Plan for Sustainable Tourism in a destination. There should be no difference in how such documents are drawn up and what they address, whatever they may be called."*

Why should a destination prepare a DMP?

At the outset, it is important to reflect on the benefits that many destinations around the world have seen from engaging in this process. They can be summarised as:

- **Fostering more sustainable tourism.** A DMP, unlike more specifically focused plans such as a marketing plan, enables all aspects and impacts of tourism to be considered in propelling a destination forward.

- **Enabling the key players to work together.** Tourism is a notoriously fragmented sector, involving the activities of many organisations in the public, private and voluntary sectors. A DMP provides the basis for a joint approach and initiatives based on partnership.

- **Setting objectives and coordinating action.** Through preparing a DMP, agreement can be reached on the shape and direction of tourism and the objectives for its development, management and marketing. Crucially, it sets out a clear and coordinated programme of action.

- **Prioritising the allocation of resources.**   By identifying the destination's most pressing needs and key opportunities, limited human and financial resources can be used more effectively.

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[2] Visit England (2012), '[Principles for Developing Destination Management Plans](#)'.

- **Attracting support and funding.** DMPs can raise the profile of tourism, strengthen the case for funding and identify projects for further support.

What types of area should a DMP cover?

A destination may be defined as: *An area of visitor appeal which includes attractions, accommodation and support services. It may be defined by physical, thematic or administrative boundaries and it embraces a set of distinctive images and qualities that give it a brand identity recognisable by potential visitors. Destinations should be places with which tourism stakeholders have a natural affinity and within which it is practicable for them to work together*[3].

Based on this definition, a wide range of types of area, including cities, regions, resorts, distinctive rural areas etc. could be considered as destinations and potentially be the subject of a DMP. However, it could be argued that, quite simply, the destination and/or the tourism sector within it should be of a sufficient size to justify and to be able to support the process.

Status of Destination Management Planning in Greece

In Greece, destination management (and marketing) remains a largely fragmented policy area due to a lack of tools that could enable the establishment of effective organisations and the growing pressure on financial resources following the economic crisis; and, in some destinations, due also to the limited cayypacity of local industry stakeholders to sustain ambitious synergies.

Several different approaches and management structures have been tested over the last decade among both top and less developed destinations in Greece. They have involved the formation or engagement of collaborative structures (e.g. committees of tourism promotion, special purpose entities, development companies under municipalities). Despite constraints, these initiatives have enabled a better understanding of the tourism sector's complexity and enhanced local communities' awareness of tourism benefits. This has stimulated a more systematic dialogue between public authorities and key private sector actors and gradually led to initiatives such as 'This Is Athens & Partners', involving the joined forces of The City of Athens, Aegean Airlines, Athens International

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[3] Adapted from Action for More Sustainable European Tourism, European Commission

Airport and the Greek Tourism Confederation (SETE). This is Athens & Partners is discussed further in the analysis of resource implications and governance in Section 3.7.

International Trends in Destination Management

The last five years have seen a significant shift in emphasis in the approach to tourism in destinations. A previous focus primarily on marketing has been replaced by a more holistic approach with a much stronger emphasis on management.   Some examples promoting this re-orientation include:

- A new look at the role of destination management organisations (DMOs), identified by Destinations International (2017)[4], which includes place-making in the community, curatorial functions, collaboration and catalysing development.

- A report by European Cities Marketing in 2017[5], which proposed that destination marketing organisations should consider how destination management might deliver a range of benefits through stronger community engagement, extending visitation beyond the hotspots, integration of the collaborative economy and in certain other ways. A further report[6] proposed a suite of tools for DMOs to get the best out of tourism growth, through education, partnerships and various management measures.

- Work on destination management by the World Tourism Organization (UNWTO) which has recently been addressing over-tourism. Two reports[7] have identified and illustrated 11 strategies and a range of management solutions, focussing on target market segments, developing visitor experiences that also benefit communities, improving infrastructure, adopting dispersal techniques and strengthening communication.

The above examples are described in more detail in Annex 1.

In addition, the Global Sustainable Tourism Council (GSTC), which is backed by UN bodies and industry stakeholders, has established a set of Destination Criteria[8] for

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[4] Destinations International (2017) A Strategic Road Map for the NEXT Generation of Global Destination Organizations.

[5] European Cities Marketing (2018) What's next for DMOs?.

[6] European Cities Marketing (2018) ECM launches a Toolbox for Managing Tourism Growth in Europe.

[7] UNWTO (2019, 2019) 'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions.

[8] Global Sustainable Tourism Criteria (2013) GSTC Criteria for Destinations.

sustainable tourism. These are in four sections covering Sustainable Management, Socio-economic Impacts, Cultural Impacts and Environmental Impacts. The first two of the 38 criteria (as revised in draft in 2019) require that a destination has an effective management organisation that involves the public and private sectors and has established and is implementing a destination management strategy and action plan.

1.4 The Approach to Destination Management Planning in Outline

The approach to destination management planning set out in this guide reflects the above context, including previous work on this subject and experience from the development of pilot destination management plans in Santorini and Rhodes.

The proposed approach is to address **four key questions:**

- Where is tourism in your destination now? – Situation Analysis

- Where does your destination want its tourism to be in 2030? – The Vision

- How does your destination get there? – The Strategy & Action Plan.

- How can success be measured? – Monitoring Progress

In answering these questions, the DMP should embrace and deliver on the internationally agreed definition of **sustainable tourism,** i.e. it must:

- Take account of its current and future economic, social and environmental impacts.
- Address the needs of visitors, the industry, the environment and host communities.

In practice, the approach is underpinned by **four core principles:**

- **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;

- **Developing the destination**, its infrastructure and tourism products and experiences, so that it increases its appeal to those visitors who will provide the greatest benefit to the destination;

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

- 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.

1.5   Key Aspects of the Approach to Preparing a DMP

<u>Securing agreement and support for the process</u>: Destination stakeholders will, between them, be responsible for implementing the DMP. Therefore, it is essential to secure their agreement on the need for a DMP, their agreement to support the process and, ultimately, their commitment to implementing it. At the outset, the main stakeholder bodies that are responsible for tourism, planning, economic development, the environment and cultural heritage should be brought together to agree on and support the development of the DMP. This should also include key private sector tourism representatives. In practice, it may prove hard to engage all of these interests at the beginning and this may need to occur through consultation activity as part of the work programme. A lead body and steering process (such as through an appointed steering group) should also be established. In some destinations this may be undertaken by an existing DMO, if one exists.

<u>Gathering the evidence base</u>: The first step involves the collection, categorisation and analysis of a wealth of resources (e.g. local and regional statistics, policy papers, legislation, tourism market reports, visitor surveys, listings of online platforms). Submitting requests for additional sets of data to various organisations (e.g. Hellenic Statistics Service, Hellenic Chamber of Hotels, SETE Intelligence, FRAPORT Greece and local stakeholders) will be necessary too. It is also important that all referenced resources are gathered together in folders per chapter of the situation analysis. The final list of sources used will vary among domestic and international organisations and cover diverse topics such as destination management trends, travel and tourism market trends, tourism product resources, visitor perceptions, impacts related to tourism development, destination performance et al.

<u>Opinion Gathering using innovative techniques:</u> It is important to understand the opinions, requirements and satisfaction of the various groups that have an interest in the destination on both the supply and demand sides – residents/community, businesses and visitors. In recent years, this has been made easier through the availability of innovative digital applications and services that enable online surveys to be undertaken

economically and quickly and to gauge opinions of those attending workshops more interactively. These will vary from a mobile application (e.g. Slido, Poll Everywhere) for opinion gathering at destination stakeholder events, to platforms for online market research surveys (e.g. SurveyMonkey, Typeform or Pollfish), which can be used to gather insights on the experiences of travellers who have visited the destination in recent years, as well as those in the destination's competitive set who have not visited.

Market Segmentation and Planning: Responsible destination management involves targeting those visitors who will provide the greatest benefit to the destination. This requires astute market segmentation analysis. This can be achieved by: assessing the destination's existing markets; analysing existing market data for Greece at national and, if available, sub-national level; reviewing markets for competitor destinations; assessing the match between various global travel trends and the destination's product offers; analysing responses from the digital/online surveys mentioned above; and assessing future market trends, which might change the nature and volume of potential demand for the destination. Segmentation analysis based on geography, demographics and lifestyle/values should underpin both product/experience development and marketing recommendations.

Consultative Planning: DMPs will be effective only if they are owned by destination stakeholders and regarded as flexible, 'live' plans, to be amended as circumstances change. Thus it is important to have a highly participative approach, including workshops and other opportunities for debate, involving key stakeholders in the development of the DMPs from an early stage, in order to secure their input and commitment.

Competitive Positioning and Brand Narrative: Greek destinations are all different, but it can be hard for potential international visitors to differentiate one from another, particularly the many islands throughout Greece. In order to manage sustainable growth and attract the kind of visitors a destination wants, it is important to understand the attractions and identity of competitor destinations within Greece, as well as internationally. This will enable a destination to identify its distinctive brand values and develop core brand narratives. These brand values and narratives will underpin the destination's ability to stand out from all others, thereby maximising its international competitiveness.

Competitive positioning requires consideration of the following key factors:

- **Destination attributes:** What are the main characteristics/visitor appeals that define the destination offer, which make it distinctive from other destinations?

- **Emotional benefits:** How does the destination make visitors feel? What feeling do they take away from being there, which imbues the destination with a distinctive flavour?

Having established these competitive differentiators, the destination's brand narratives can be developed. They are the stories the destination tells about itself, which make it distinctive and competitively appealing to potential visitors.

<u>Experience Development</u>: Closely related to the previous point, an imperative in competitive positioning is to develop exceptional visitor experiences in a way that will highlight the distinctive/authentic attributes of the destination. Thus the DMP should identify gaps in the tourism offer required for target markets and provide a framework for experience development, which will guide the strengthening of existing experiences and the development of new experiences to provide compelling reasons for those visitors the destination wishes to attract to come to the destination, particularly at off-peak times.

<u>Minimising Negative Impacts</u>: While DMPs generally focus on managing growth and optimising value, they should also include measures to minimise any negative impact from tourism. This is particularly important in those destinations where there are already heavy pressures at certain times and/or in certain places. For many destinations such pressures arise only in peak periods in tourism 'honeypots'; while much of the rest of the year, the destination may be eager to attract more visitors, particularly to less visited areas. A strategy to manage visitor flows needs to take account of such nuanced needs within a destination.

The most common types of negative impact from tourism, especially in rural and island destinations and destinations whose cultural heritage underpins its visitor appeal, are:

- **Pressure on cultural and environmental assets,** from tourism developments and visitor activities, which may lead to degradation of landscapes and specific sites, loss of biodiversity and other damage to the built and cultural heritage.

- **Diminished visitor experience**, as a result of too many visitors in one place at one time or competing for access to sites, transport, entertainment, eating or other visitor facilities.

- **Congestion and overcrowding**, which hinders the efficient functioning of everyday community life, inconveniencing residents, leading to reduced tolerance of visitors.

- **Competition for limited resources and essential services,** such as land, water, energy, and social services.

- **Price rises for essential goods and services**, such as housing, food and transportation, where demand may be driven by higher-spending visitors to a point which could become unaffordable for local residents.

Various steps can be taken to minimise such impacts, from restricting access, introducing quotas, tighter regulation and licensing to pricing. Some of these may require national legislation, local regulation changes or business policy change.

<u>Practical Value/Action Focus</u>: A DMP is only of value if it is realistic for stakeholders to implement it in practice, through an effective DM structure, with access to required expertise. Actions proposed must be both aspirational and achievable, in terms of the human and financial resources available for implementation. But a lack of resource now should not constrain ambition for the future. Indeed, ambitious and innovative plans can themselves stimulate a willingness to invest by local stakeholders and attract external investors. An action plan is a fundamental component of a DMP. This should identify specific actions against a clearly identified set of strategic priorities.

<u>Performance Monitoring and Measurement</u>: The DMP should be seen as an ongoing process which is the subject of continuous assessment and improvement. This will require regular monitoring and measurement of the performance of the destination as a whole and of the implementation and results of the actions contained in the DMP. Performance measures can be at three different levels - activities, outputs, outcomes – and should be relate to the fulfilment of strategic objectives. These are defined as:

- **Activities:** the actions the destination undertakes (e.g., attending international trade fairs, social media campaigns, developing strategic paper making the case for pedestrianisation et al).

- **Outputs:** operational results (e.g. number of international tour operators persuaded to include the destination in their programmes; level of online engagement via social media and website click-throughs, investment in pedestrianisation).

- **Outcomes:** material benefits to the destination (e.g. more visitors; increased economic impact; strengthened local communities; improved visitor flows; environmental improvements; more off-season visitors).

Measuring outcomes is the most valuable to the destination, but also the most difficult to obtain; whilst measuring activity undertaken is relatively easy, but of limited value,

THE WORK PROGRAMME FOR PREPARING A DMP

2. The Work Programme for Preparing a DMP

The work programme should follow the simple approach set out in Section 1.4, starting with gathering evidence for the Situation Analysis; then setting the Vision and Strategic Objectives for 2030 (or whenever) followed by the Strategy and Action Plan for achieving the Vision and Objectives; and finally proposals for Governance (if known) and Monitoring Progress.

2.1   Outline Work Programme

Set out below is the outline of the programme of work undertaken in Rhodes and Santorini. In the remainder of the section the components of the work programme are examined in greater detail.

1.   **Briefing and Inception meeting**

2.   **Desk research**

   a.   Analysis of relevant research and planning documents at local, regional and national level

   b.   Review of Political, Economic, Social, Technological, Environmental and Legal (PESTEL) context, highlighting relevance for the destination

   c.   Identification and analysis of main competitors and destination's current competitive position

   d.   Mapping of stakeholders – key tourism organisations and businesses in and related to the destination

   e.   Initial market analysis and segmentation from available data

   f.   Analysis of visitor perceptions of destination, from existing surveys, social media, etc

   g.   Initial product/resources assessment.

3.   **Consultations**

   a.   Project communications, including website

   b.   Key stakeholder interviews and site visits

   c.   Stakeholder workshops and community forum(s)

4.   **Primary research**

   a.   Consumer survey - online

b. Industry survey - online

        c. Community survey - online

5. Situation analysis report

6. Plan development

        a. Strategy discussion paper

        b. Strategy development workshop

        c. Strategic Priorities and Action Plan

        d. Review and analysis of potential implementation structures and governance

        e. Preparation of DMP

2.2   Briefing and Inception Meeting

The first step should be to prepare a brief for the preparation of the DMP. This should be undertaken by the lead agency, following a meeting with the main stakeholders who have agreed to initiate the process.

The brief should set out clearly the context and purpose of the DMP, the expected output, the timetable and the communication and reporting process.

The work programme may be carried out by contracted external consultants or by an internal team with the necessary expertise.

It may be appropriate to have a launch event and media briefing, depending on the local circumstances.

Following the appointment of the team, an inception meeting should be held with the lead agency. The meeting may include a small number of key stakeholders, but a large meeting should be avoided.

The agenda of the inception meeting should include the following:

- Review of proposed work programme + timetable for delivery.

- Review of relevant research and planning sources and documents (including analysis of main source markets) and arrangements for accessing them + potential need for additional research

- Review of key stakeholders + plan for stakeholder mapping process

- Plans for stakeholder consultation and engagement

- Discussion of criteria for product/resource assessment

- Plan for competitor analysis and review of good practice in relevant comparator destinations

- Review of current destination management arrangements and potential changes

- Agreement on project reporting and monitoring process.

2.3 Desk Research

Analysis of Relevant Research and Planning Documents at Local, Regional and National Level

The collection and analysis of resources should include relevant policies, plans, programmes, previous studies, research data and statistics. Sources and examples include:

- Programmes, campaigns and research undertaken by the Ministry of Tourism, the Greek National Tourism Organisation (GNTO) and key tourism industry groups (Greek Tourism Confederation – SETE, Hellenic Chamber of Hotels, Fraport, Hellenic Ports Association, etc.).

- Relevant policy documents of key ministries (e.g. Regional Framework for Spatial Planning and Sustainable Development by the Ministry of Environment, Energy and Climate Change).

- The Operational Programme of the respective Regional Authority and relevant documentation (e.g. smart specialisation projects, list of local projects approved and funded through the National Strategic Reference Framework).

- The programme of tourist promotion undertaken by the respective Regional Authority and documentation on partnerships with national and local stakeholders.

- The programme of tourist promotion undertaken by the respective Municipal Authority.

- Other programs and projects undertaken by the respective Regional and/or Municipal Authority with a direct or indirect relevance to tourism development (e.g. studies of carrying capacity assessment, development of new infrastructure, regeneration of urban areas, development of new products such as cultural routes).

- Statistical information (e.g. on cruise tourism, energy consumption, water consumption) by respective departments or companies under the respective Municipal Authority.

- Studies and projects undertaken by local stakeholders (e.g. chambers of commerce, tourism industry groups).

Review of Political, Economic, Social, Technological, Environmental and Legal (PESTEL) Context

An analysis of the external context and key issues that may affect the performance and impact of tourism in the destination is a crucial part of the process. It will be informed by the initial desk research, but also through the picture built up during stakeholder research and consultation, described later.

It is important that a PESTEL analysis should contain information relevant to the destination, whether at a global, national or local level. Generic information, which has no potential implication for the destination's tourism, should not be included. The range of topics addressed in the PESTEL analysis should include:

- Issues of geopolitical nature (e.g. flows of refugees and immigrants, political tension).

- International developments of significant importance (e.g. Brexit, tour operator collapse).

- Political and legal measures, which might constrain, aid, or otherwise affect tourism development.

- Plans for major infrastructure projects at the regional/local level.

- Contribution of the tourism sector to regional/local economy and employment.

- Recent performance of the tourism sector from both a supply and demand point of view at the national/regional/local level.

- Latest trends on consumption patterns, product development responses, and the attitude of local communities towards tourism.

- Latest trends on tools, platforms, channels, data analysis, and technological developments with increasing interest for destination authorities and businesses.

- Latest trends on the tourism sector's environmental impact and best practices in relation to the operation of tourism businesses and the strategies on sustainable tourism development by international and domestic destination authorities.

- Latest work on European and national legislation (e.g. regulations on short-term rentals, governance framework for destination management initiatives).

- Insights on market trends, changing travel motivation and behaviour in external markets.

For the purpose of illustration, Annex 2 includes items from the PESTEL analysis prepared for Rhodes and Santorini DMPs.

Identification and Analysis of Main Competitors and Destination's Current Competitive Position

In order to understand where a destination's competitive strengths lie, it is essential to undertake a competitor analysis. This need not be complicated or elaborate. Based on insights from consumer research and stakeholder consultation, these are the steps to follow:

- Identify your destination's strongest tourism appeals (e.g. scenic beauty, local cuisine).

- Place these on two axes on a chart.

- Identify who your main competitors are in relation to these appeals – through consumer research, interviews with overseas tour operators, and consultation with inbound tourism businesses in the destination.

- Plot where your competitors sit in terms of their tourism offer in relation to these two appeals.

- Plot where your destination sits in relation to these competitors.

An example of a competitor analysis for Santorini is included below. This identifies Santorini's current competitive advantage, which provides a sound basis upon which to develop visitor products and experiences and to inform marketing messages.

Example: Santorini Competitor Analysis

Santorini is shown in relation to its main competitors for the type of visitors who will contribute most towards the sustainable development of its tourism. There are two dimensions to these competitive analyses:

- **Physical:** the strongest destination assets (intimate scenic beauty and locally produced food and wine);

- **Emotional:** the emotional appeals (romantic and indulgent).

The characteristics in boxes at the top and right of each axis represent those in which Santorini excels. These represent the island's strongest visitor appeals. Those on the other end of each axis represent the antithesis of these strengths. This does not mean Santorini does not possess other appeals; it does. But, in order to identify Santorini's strongest competitive position, it needs to lead with its strongest assets and assess objectively how strong they are in relation to its main competitors.

Santorini – Physical
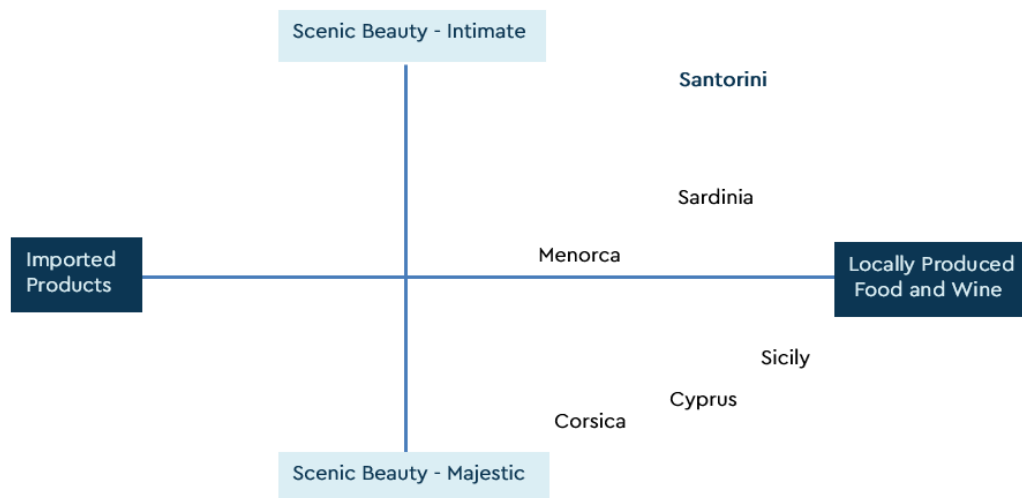
Conclusion: Santorini's most competitive **physical** assets are its intimate scenic beauty (volcanic) and locally produced food and wine.

Santorini – Emotional
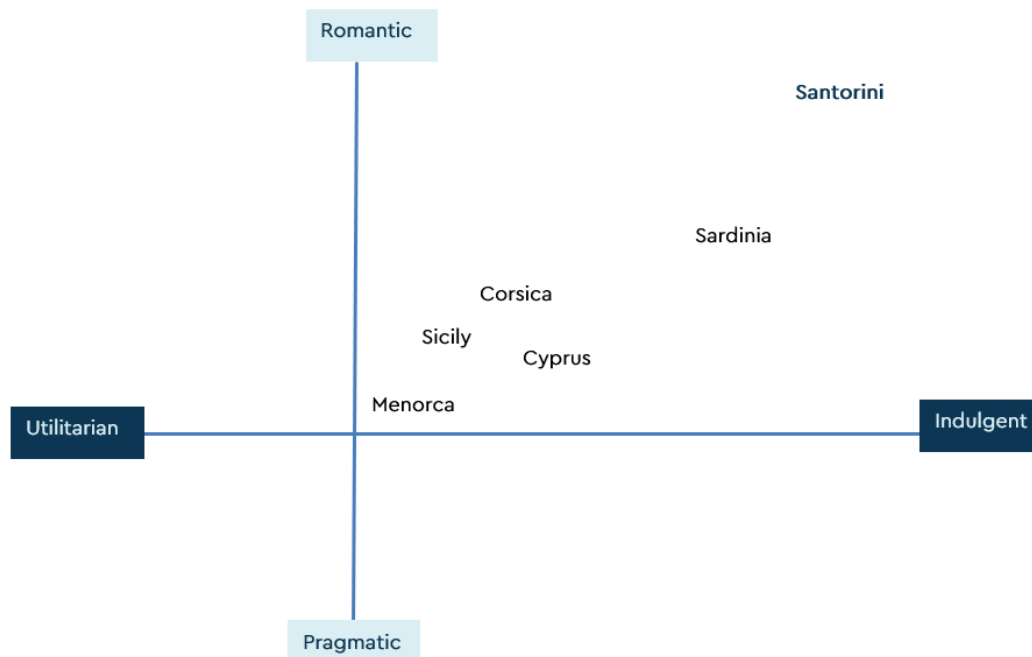
Conclusion: On an **emotional** level, Santorini conveys a sense of romance and indulgence. There is a sensual beauty that infuses the experience conveyed by the combination of the island's intimate scenic beauty and the opportunity for indulging the senses of taste (e.g. gastronomy), smell (e.g. wild flowers, vines and plants), and touch, with a relaxing spirituality (e.g. spa, wellness, yoga, outdoors).

Mapping of Stakeholders

It is important to identify the destination's main stakeholders and the role they might be expected to play in developing and implementing the DMP. From this perspective, stakeholders will fall into primary, secondary and other types, according to how tourism might impact them, the benefits they might receive from tourism, and the role they might play in developing the DMP, as follows:

- **Primary stakeholders** are those who have the greatest interest in the development of sustainable tourism in the destination and who might play an active role in developing the DMP, who can use their voice, skills, knowledge or position to exercise significant influence on the development and implementation of the DMP. Examples of likely primary stakeholders include: local authorities/municipalities; DMO (if existing); tourism industry representative bodies; main transport and tour operators.

- **Secondary stakeholders** are those who are likely to be direct beneficiaries of tourism, but who may not play an active role in contributing to the development of the DMP, but who may still be in a position to implement elements of the DMP and act as advocates of the DMP wherever appropriate. Examples of secondary stakeholders include: individual tourism businesses; operators/manages of visitor attractions and cultural or natural heritage sites; other transport and tour operators.

- **Other stakeholders** are represented by most of the rest of the community, who may benefit indirectly, rather than directly, from tourism. They may be involved from time to time as consultees, to establish their views on tourism's impact and what they would like to see. It is also important they are made aware of the importance of tourism, as well as the role of the DMP and its progress in delivering the type of tourism they and the community want. Examples of other stakeholders include: all local residents; civic society and community bodies.

The range of stakeholder groups should include:

- Ministries

- Regional government directorates and organisations

- Local government directorates and organisations

- Organisations involved in the provision of transportation services

- Tourism industry associations

- Other professional groups (e.g. chamber of commerce, trade association)

- Key attractions

- Other organisations (e.g. universities, citizen groups, environmental organisations)

- Airlines, cruise companies and tour operators with significant activity at destination level

- Other appropriate tourism-related businesses.

Initial Market Analysis and Segmentation from Available Data

The approach to market segmentation will be determined by the type of tourism a destination desires. However, as tourism increasingly offers opportunities for economic growth around the world, there is concern to ensure this is sustainable growth.

Destinations wishing to optimise the value of tourism, which is sustainable, should prioritise market segments according to their current and future potential to deliver sustainable tourism for the destination.

This is based on an assessment of the relative value of each segment versus its estimated impact on the destination in terms of sustainability. The following criteria should be taken into account in prioritising segments:

- **Value**: Current and future potential value (e.g. volume x spend x repeat visit propensity). This information can be obtained from national surveys (e.g. GNTO, SETE, FRAPORT, Hellenic Statistics Service, Hellenic Chamber of Hotels, Hellenic Ports Association et al), regional and local visitor surveys, and any market-specific reports relating to particular countries and market segments).

- **Sustainability**: Impact on the destination's natural environment, physical infrastructure, resources, and community (e.g. propensity to spread benefits around the destination, visit outside the main season, consume fewer scarce resources, have a lower carbon/emissions footprint, minimise congestion, contribute towards heritage preservation and natural environment conservation).

This information will require a degree of judgment, based on an analysis of visitor trends, interests and behaviour by market and by segment (e.g. length of stay, type of products/experiences participated in et al) from international trend reports (various sources), national surveys and visitor profile studies, and market-specific reports on traveller preferences and likely future trends relating to particular countries and market segments.

The most attractive segments are those that offer greatest value and contribute most in terms of sustainability/least negative impacts.

The purpose in prioritising these segments in this way is to identify those for whom visitor experiences, products, and visitor-related infrastructure should be developed, and at whom marketing should be targeted, because these are the segments which will deliver the most sustainable long-term growth for the destination.

Segments should further be identified, as far as possible, by:

- Geography (country of residence);

- Lifestyle values/travel motivation.

Analysis of Visitor Perceptions of Destination, from Surveys, Social Media, et al

Visitor perceptions can be derived using a variety of relatively cost-effective methods, including:

- Existing visitor surveys already carried out at destination level.

- Social media monitoring tools for conducting a sentiment analysis of key groups talking about the destination.

- An overview of key data (e.g. reviews, ratings) derived from review websites and online travel agents about the performance of key elements of the destination in relation to its key competitors.

- Online surveys targeting specific markets conducted through platforms such as Pollfish.

- On site surveys at the airport, or popular tourist sites.

- Interactive tourism stands which, in addition to providing information to tourists, could also measure visitor's satisfaction.

Initial Product/Resources Assessment

The main purpose in undertaking a destination product/resources assessment is to understand the range and quality of tourism products and visitor experiences available in the destination; and to identify where they might need improvement, or new products/experiences might be developed.

Tourism products and experiences cover a wide range of facilities, services and experiences offered in the destination, which contribute to the visitors' ability to 'consume' and enjoy the destination, including:

- Tourism facilities: accommodation (type and standard), restaurants/bars (type), visitor attractions, retail.

- Heritage and culture: historic/heritage sites, folk traditions, arts, crafts, cuisine, aspects of living culture.

- Landscape and countryside: nature, quality, appeal and distinctiveness of the landscape/scenery (incl. beaches, forests, hills, coats, maritime environment), routes/trails, wildlife.

- Built environment: towns, villages and the public realm – appearance and maintenance, incl. distinctive architecture, public/street art, monuments, parks/gardens, commercial signage appearance.

- Access and transport: airport, roads, marine; air, ferry and cruise services to and within the destination, transport providers (public and private).

- Visitor services: visitor information provision and outlets; signposting (directional and interpretive), car-parking, toilets, other services. Accessibility of tourism products and services.

- Activities and events: leisure, community and business events; festivals; cultural and sporting events.

The destination audit should cover:

- **Quantity:** An inventory of main tourism products/experiences of all types.

- **Quality:** An assessment of how good or otherwise the destination's tourism products/experiences are.

- **Distinctiveness:** How reflective are the tourism products/experiences of the destination's character? Do they convey a true 'sense of place'?

- **Competitiveness:** How do they compare with products/experiences in competitor destinations? What barriers to growth are there? What support is required to improve competitiveness?

- **Future-Proof:** How appropriate are the type and quality of products/experiences in light of anticipated future market trends? What threats might there be to their future viability?

It is important to maintain an up-to-date inventory of the main tourism products/experiences, and an awareness of their competitiveness, so that any competitive slippage can be addressed before the destination falls behind its competitors.

2.4 Communication and Consultations

Project Communications

It is highly desirable for a communications programme to run throughout the project, particularly to maximise community awareness and engagement and inspire stakeholder interest in implementing the DMPs. Specifically, there should be an interactive project website/microsite to communicate progress, encourage stakeholder participation, and provide the platform for online surveys of tourism businesses, residents and other stakeholders. Regular media communications aimed at stakeholders and the wider community (social and traditional) could also help to generate interest and keep a wide range of stakeholders up to date on the DMP's progress.

Essentially the microsite becomes a key channel for disseminating information on the scope, methodology, phases and milestones of the project. Towards project completion it will also be the fundamental source for stakeholders and interested parties to access project reports and up-to-date communications material.

Key Stakeholder Interviews and Site Visits

Using the list of stakeholders now prepared (as a result of the mapping exercise noted above), key players from each tourism sector should be selected and invited for interview on a one-to-one basis or in small peer groups. A relatively modest number will usually enable a sufficiently representative sample of key players and views from different sectors - ideally, there should be 30 or more such interviews.

Interview topics will vary according to the background of different stakeholders and the nature of their business, but should touch on issues such as experiences /services / markets with potential for growth, the benefits and challenges of tourism development at destination level, and key priorities for destination management planning in the future. Interviewing key stakeholders can be combined with visits to major existing attractions, providing the opportunity to talk to both the managers and front line staff dealing directly with visitors; and also with visits to communities to discuss tourism impact and management issues and the potential for creating exceptional new experiences for visitors, relating to the social and cultural life of the area.

Stakeholder Workshops

Stakeholder participation is essential for the success of a destination management plan. Workshops facilitate such engagement, not only because they stimulate involvement and discussion in relation to emerging policy proposals, but also because they help secure a sense of ownership by the participants. Workshops where the main participants are organisations, should consist of representatives from the public and the private sectors. Together with the responsible administrative authorities, it is also necessary to invite associations and businesses that represent different sectors within the tourism industry, other stakeholder organisations and academic institutions. Such a spectrum of stakeholders will give a relatively comprehensive overview of the state of tourism development in a destination, and furthermore provide detailed feedback with regard to the DMP's target markets, aspirations, demand and trends.

To enable stakeholder and local community participation requires careful preparatory work ahead of workshops (e.g. list of participants, official invitations, follow up communications to boost attendance, press release dissemination, audio visual equipment testing, venue-catering-video recording arrangements, registration on site, etc.).

Subjects for discussion should include:

- **The project:** reasons, objectives, timetable - progress to date, work to come

- **Explain strategic aim:** to create and manage a sustainable tourism destination

- **Stakeholder views on:** stakeholder's own business performance; performance of the stakeholder's sector of the tourism industry; destination performance.

- **Stakeholder views on:** what works well; opportunities for change; weaknesses and risks

- **Examples of best practice** – presentations from two or three leading DMOs

- **Findings** of desk research.

Stakeholder engagement, using innovative workshop techniques

Interactive sessions and live polls are effective tools through which participants are enabled to actively contribute in a workshop. Platforms such as Slido and Poll Everywhere are useful for asking questions in workshops and demonstrating the results immediately. Brainstorming, open discussions, or breakout sessions covering areas such as competition, areas of improvement, or development, are other methods through which participants can share their views. Furthermore, interviews or site visits are additional methods through which more insights can be gained.   Subjects that should be covered include:

- Who are the main competitors and what do they do well?

- What are the destination's existing and potential USPs?

- What should the vision be for tourism over the next 10 years?

- What are the destination's needs, key brand narrative themes and brand values?

- What are the opportunities to create exceptional new experiences for visitors?

- What are the most significant gaps in the tourism infrastructure?

- What are the negative impacts of tourism – at business, community and environmental levels?

- How should the future development, management and marketing of tourism be organised and who should be involved?

Community Forum(s)

In addition to the main stakeholder workshops, it is valuable to hold one or more meetings with local communities, in order to enable residents and community groups to engage directly with the DMP process and to contribute their thoughts and ideas on tourism development. This is important to ensure people feel they are part of their community's tourism future and that it is not being imposed on them. The agenda could include discussions on recent and anticipated trends in business; what differentiates the destination from its competitors; opportunities and challenges for community engagement in developing new visitor experiences; impacts of tourism on the community; key issues for tourism and for the future of the community; and particularly what they would like to see in future and any concerns they may have.

2.5   Primary Research

A mix of primary research activities, including expert interviews and surveys among different audiences, is important to generate first-hand up-to-date insights to inform destination management planning. It can also compensate for data gaps identified during desk research. The sample of key players/influencers (e.g. public officials, heads of industry groups, prominent entrepreneurs, local community leaders, academics) should initially be informed by feedback from policy workshops, before additional requirements on experts (e.g. highly experienced international players are considered).

For the surveys, the process of selecting a sample of the population (e.g. local population, recent visitors) is subject to budget and time limitations. Hence, it requires defining clear assessment criteria before launching a survey so as to facilitate ongoing adjustments and corrective actions at a later stage (e.g. advertising the local business and community survey through local media).

Consumer Survey

Understanding traveller perceptions of, and attitudes towards, your destination, as well as their travel motivation and behaviour in general, are important to help define how well your destination performs competitively and what might need to be improved. If possible, it is important to establish not just how previous visitors perceive your destination, but also how it is perceived by non-visitors, who are in the competitive set for your destination. This will help identify what products, experiences or services need to be improved as well as identify how you might need to reposition your destination to appeal to those who have not yet visited but might do so.

Traditional traveller survey methods can elicit valuable insights from previous visitors (e.g. through hotel customers, visitors in-destination, or passengers at destination entry and exit points), as can online surveys. Online polling platforms can also cover a large number of 'non-visitors' in many countries worldwide. Interview/polling samples need to be well-targeted to gather the most valuable and actionable insights.

For previous visitors, topics might include:

- Profile of visitors

- Attitudes to your destination

- Likes and dislikes in relation to your destination

- What might have made their destination experience better

- Travel arrangements

- Holiday trip planning sources and channels

- In-destination experiences: products, facilities and experiences used/participated in

For 'non-visitors', topics might include:

- Travel motivation

- Main products/experiences desired on holiday

- Perceptions of the destination

- Reasons for not visiting

- Other destinations visited/considered

- Holiday trip planning sources and channels

Industry Surveys

Obtaining the views of local businesses is important, particularly on what they consider to be the main opportunities, constraints and need for change in relation to the destination's tourism development.

The choice of survey method will depend on factors such as the number of people to be surveyed, size of geographical area to be covered, respondents' willingness to participate/travel, and budget. Traditional survey and interview methods can be deployed (e.g. one-to-one interviews, focus groups, questionnaires) to elicit insights from businesses. Online platforms, such as SurveyMonkey, Typeform and Google Forms, are also useful, relatively cost-effective and easy to manage, for conducting surveys of local businesses. Such an approach requires spreading the word about the surveys through various channels within a limited period of time, as well as ensuring that local

stakeholders disseminate the surveys to their members. Questionnaires should focus on the aspirations and concerns of local businesses and on their views about the positive and negative aspects of tourism.

For local business surveys, topics might include:

- Overall business performance

- Areas/types of experiences offering greatest growth potential

- Constraints on business growth

- Key target markets and competitor destinations

- The most important challenges facing the destination

- The positive and negative impacts of tourism

- Suggestions for the future of tourism – changes desired

- 5-year perspective on the destination's future.

Community Surveys

Residents' views on the impact – both positive and negative – of tourism in their community are important to understand in developing a DMP. So too is their perspective on the future of their community and the role they would like to see tourism play in its development. Similar tactics to those outlined above for industry surveys can be used to elicit community views.

For community surveys, questions might cover:

- Satisfaction with tourism development and attitudes to visitors

- The positive and negative impacts of tourism

- How tourism affects their daily lives

- Is tourism overall beneficial or detrimental?

- What issues would they like to see changed in the future?

2.6   Situation Analysis

The purpose of a Situation Analysis is to provide evidence for the preparation of the Destination Management Plan (DMP). This should draw together and summarise the results of all the research and consultations undertaken thus far. It should conclude with a **SWOT Analysis** - identifying the strengths, weaknesses, opportunities and threats relating to both the destination and its capacity to implement a DMP.

The SWOT Analysis is an effective way to summarise the evidence gathered.   However, it is important that it is not seen as an end in itself. For each of the items in the SWOT, there must be a direct link through to policy development.   The approach should be to build on the strengths, address the weaknesses, make the most of the opportunities and minimise the impact of the threats.

There should be two perspectives to each part of the SWOT analysis:

- **Destination SWOT,** which assesses elements relating to the destination, primarily from a competitiveness perspective;

- **Institutional SWOT**, which assesses human resource, political, institutional, economic, legal and funding factors, which may affect the ability to develop, implement and monitor a DMP.

2.7   Plan Development

Development of the DMP necessarily involves several tasks, the number and complexity of which may vary according to the scale and nature of the destination. The following are recommended core tasks.

Strategy Discussion Paper

Preparation of a Strategy Discussion Paper is a good way to start constructing a strategic framework for the destination management plan. The purpose is to provide a basis for discussion with key stakeholders in the destination, with a view to obtaining a consensus on the approach. The paper should build on the foundations of the Situation Analysis, outlined above. In particular, it should identify the policy implications arising

from the SWOT Analysis – most importantly the major opportunities and challenges for the development of tourism and the potential policy responses to these.

This should lead to the formulation of a basis of the Vision for the development of tourism. It will also provide a basis for identifying strategic priorities for the destination and potential implications for marketing and the development of new products and experiences. These set the agenda for discussion in the following tasks.

Strategy Development Workshop(s)

Workshops to engage stakeholders in the development of the strategy should be the fulcrum of the DMP process. These strategy development workshops are about presenting the findings and proposals and seeking reaction and agreement to them. They are different from the consultation workshops, described earlier, which are about fact finding. Ideally, workshops should be held at both stages. The techniques identified previously can be used in both.

This is the point where evidence and ideas gathered (set out in the Situation Analysis and Strategy Discussion Paper) are subject to a creative process, to set the Vision and the strategy for achieving it. Such workshops should be used, not only to set the Vision and agree the Strategic Priorities, but also to explore stakeholder views on their destination's competitive positioning; to hone the destination's brand narratives and values; to generate ideas for the creation of exceptional new experiences that are rooted in the life, the heritage and the environment of the destination communities and reflect their 'sense of place'; to confirm the type of tourism that residents want and that the destination can carry sustainably; and to discuss potential delivery structures.

Strategic Priorities and Action Plan

Building on the Strategy Discussion Paper and the outcomes of the Strategy Development Workshop, Strategic Priorities should be identified, with clear actions flowing from each Strategic Priority. In order to give coherence and a clear focus to the DMP, Strategic Priorities should be limited (e.g. ideally to around 6).Each should lead to several areas of action; and each area of action should lead to several specific action recommendations. This cascading approach is illustrated in Section 3 below. The

Action Plan should identify methods to measure performance for each action, enabling key performance indicators to be established in due course, once the level of investment and effort in the action has been identified.

Implementation of the Action Plan will necessarily involve a wide range of stakeholders. If time permits, it would be desirable either to engage stakeholders in the formulation of the Action plan; or to consult them on a draft. The ambition should be not only to gain the agreement of multiple stakeholders to the content of the DMP, but also to obtain their commitment to work together to implement it.

Review and Analysis of Potential Implementation Structures and Governance

Following directly from the previous point, it will be important to devise an implementation structure that enables and supports key stakeholders in working together to implement the plan. There are various ways in which this might be achieved in Greek destinations, as discussed in *Governance options for DMP implementation* below. The DMP should either make specific recommendations for such a governance structure, if a consensus has emerged already from the consultations, or set out the options for the stakeholders to review following completion of the DMP.

Preparation of a DMP

The final stage of the process is the preparation of the DMP itself, in an accessible format with a practical focus. This will combine the key elements of the various outputs noted above into a single, coherent, action-oriented document, the structure and content of which is set out in the next section. Importantly, this is a 'live' plan, which should be reviewed regularly and updated as progress is made or circumstances change.

STRUCTURE, CONTENT AND KEY COMPONENTS OF A DMP

3. Structure, Content and Key Components of a DMP

As the output of the structured process set out in Section 2 above, the DMP will provide a logical argument for, and explanation of the process for, destination management planning. It will elaborate the challenges and opportunities the destination faces, set an ambitious but realistic vision for the future, outline the strategic priorities it will pursue to achieve this vision, and include a practical action plan to deliver against these strategic priorities. It will also identify the governance structure, human and financial resources it will require to do this, as well as the way it will monitor progress. The inclusion of examples, illustrating how other destinations have addressed particular destination management challenges, will inspire confidence amongst destination stakeholders in implementing particularly challenging aspects of the DMP.

3.1   Outline Structure

The Rhodes DMP example below illustrates a DMP structure and range of content, which derives from the type of process outlined in Section 4 of this report.

Example: Rhodes DMP Structure

1. Executive Summary	**5. Where does Rhodes want its tourism to be in 2030? Aim and Vision**
1.1 Importance of this Destination Management Plan to Rhodes	5.1 Strategic Aim and Vision
1.2 Current Situation and Challenges	5.2 Strategic Focus
1.3 The Way Forward	5.3 High-Level Objectives
1.4 Critical success Factors	**6. How Will Rhodes Get There? Strategy and Action Plan**
2. Introduction	6.1 The Approach to Strategy
3. The role and value of DM Planning	6.2 Brand Positioning
3.1 Destination Management as the Basis for Sustainable Tourism	6.3 Target Markets
3.2 Destination Management Planning	6.4 Strategic Priorities
3.3 The Approach to Destination Management Planning in this Report	6.5 Action Plan
	6.6 Marketing Plan

The remainder of this section looks in more detail at some of the key components of the DMP.

3.2   Strategic Aim, Vision and Objectives

The **Strategic Aim** should encapsulate the reasons for developing tourism in the destination.

The **Vision** should paint a picture of the way stakeholders and residents would like to see tourism in the destination evolve in the years ahead.

The **High-Level Objectives** should identify a limited number of key quantifiable outcomes to be achieved, which can be used as a basis for measurement of overall destination performance.

Examples from DMPs developed for Rhodes and Santorini are used to illustrate some destination management planning principles below. The following text from the Rhodes DMP illustrates the hierarchy between a Strategic Aim, the Vision and High-Level Objectives.

The proposed **Strategic Aim** for tourism in Rhodes in 2030 is:

> 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.

Taking account of this Aim, together with the results of the desk research and the consultations, the following **Destination Vision 2030** is proposed for Rhodes:

> In 2030, Rhodes will have evolved into 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.

Supporting the Strategic Aim and Vision are five clear High-Level Objectives to be achieved by 2030:

1. To ensure that 75% of the tourism capacity is open for at least ten 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. To increase the average daily spending of visitors to the island by 30% (at 2020 prices).

3. To stimulate the growth of 50 new tourism businesses or community enterprises offering new visitor experiences around the island on a year-round basis.

4. To establish one Signature Route (see *Visitor Experience and Product Development* below) each year for seven years.

5. To establish a year-round programme of events designed to attract the DMP's target segments.

3.3   Strategic Priorities and Action Plan

As noted in Section 2, the primary focus of the DMP should be on a limited number of Strategic Priorities, each with a set of associated action areas. They should respond to the opportunities and challenges identified and address the Strategic Aim and Vision set for the DMP.

1.   **Rhodes for All Seasons** – the 'Flagship' initiative

2.   **Repositioning Rhodes** – enhancing its image and broadening its appeal

3.   **Creating Sustainable Rhodes** – sustainable in terms of environment/natural resources, communities, visitors, businesses

4.   **Managing Visitors in the City** – maximising visitor enjoyment and quality of life

5.   **Extending the Footprint** – spreading tourism benefits to businesses and communities across the island

6.   **Enhancing the Visitor Experience** – focusing on quality

The following are the Strategic Priorities identified for Rhodes:

In addition to these Strategic Priorities, there are two supplementary categories of recommendations:

- A **'Contingency Priority'** relating to crisis preparedness and civil protection;

- A series of **enabling programmes and actions**, to support delivery of all the priorities.

For each of the Strategic Priorities, a number of Action Areas should be identified. In the Rhodes DMP, they are as follows:

Strategic Priority	Action Area
1. Rhodes for All Seasons Creation and promotion of special year-round experiences to attract new markets in both winter and summer, extending the benefits of tourism more widely	• New experiences and events • Incentives for visitors and tourism businesses • Creation and promotion of attractive off-season packages, designed for target markets • Growth of winter MICE markets
2. Repositioning Rhodes **Enhancing its image, broadening its appeal** Reducing dependence on sun, sea, sand - but maintaining/ nurturing main season volume business	• Clear brand identity, differentiating Rhodes from competitors. • All-year-round tourism, with high value market segments and related products • Attraction of high yield target markets, including more independent travellers (FIT) • Increased focus on international conferences • A green island • Broad marketing strategy to support repositioning
3. Creating Sustainable Rhodes Enabling sustainability in terms of environment/ natural resources, communities, visitors, businesses	• Managing tourism volumes to take account of carrying capacity of Rhodes Town and Lindos • Sustainable practices by tourism businesses • Action on infrastructure – seaport, airport, roads, footpaths, cycleways, water, power, energy efficient lighting, transport • Water and power conservation/ management measures • Best practice waste management/recycling • Quality management of public realm: • Improved transportation for visitors • Strengthened links with local producers • Carbon-neutral destination – targets and related measures

4. Managing Visitors in the City Maximising visitors' enjoyment and residents' quality of life	• Enhanced access for visitors • Visitor flow management • Better access to walking the wall • Attracting visitors to surrounding areas and islands
5. Extending the Footprint Spreading tourism's benefits to businesses and communities across the island	• Engaging and supporting the communities • Local plans for development in priority locations/sites • Themed routes • Engaging and supporting the communities • Supporting MSMEs – business development skills • Strengthened local supply chains (especially for food, wine, crafts and souvenirs)
6. Enhancing the Visitor Experience Focusing on quality	• Point of arrival welcome and information • Enhanced access to Rhodes' cultural and natural heritage and character • Enhancing Rhodes' visitor attractions offer • Quality assurance • Enhanced access to destination information • Opportunities for interaction between visitors and local communities
Crisis preparedness/ civil protection	• Legal framework for crisis response • Operational framework for emergency response • Crisis management plan • Crisis recovery plan
Enabling/ supporting actions (cross cutting)	• Industry education and training • Research and intelligence • ICT systems and applications • Performance measurement/management

The next stage is to prepare an **Action Plan**, setting out recommendations for specific actions in each of the action areas. The Action Plan prepared for Santorini is shown in Annex 3A. It includes a suggested lead body for each action and appropriate measures of performance.

If time permits, a DMO or body responsible for progressing implementation of the DMP is in place, and there is a high level of key stakeholder engagement, it would be desirable to prepare a **more detailed and definitive Action Plan**, including the supporting partners, timescale and potential budget for each proposed action. A framework for a more detailed Action Plan, which could be prepared if such a body is in place, is shown in Annex 3B.

3.4   Marketing Plan

A marketing plan may be integral to the overall Action Plan or set out as a separate component of the DMP.

A marketing plan sets out a method of attracting the sort of tourism that will underpin the destination's sustainable tourism development. Four principles underpin the marketing plan:

- **Sustainability:** The focus should be on attracting the types of visitor who will contribute most to the aim of developing a sustainable tourism economy. This means targeting those who will deliver most benefits with least negative impact, taking into account those more likely to stay longer, spend more, return, and visit outside the main season and impose least on the destination's natural resources, built heritage, and residents' tolerance.

- **Cost-effectiveness:** A limited range of the most cost-effective, marketing activities should be identified, acknowledging the need to achieve maximum impact with the limited resources available.

- **Targeted marketing:** Marketing should not be spread too thinly and should focus on a limited range of the best prospects for the destination, in terms of their ability to deliver most value and contribute most to the destination's sustainability.

- **Product-market fit:** Marketing investment should also focus on those who would most appreciate the destination's range of appeals and therefore be likely to stay longer and spend more, rather than on short stay, lower-spending, "Instagram"-focused visitors.

The marketing plan should address the following issues:

- Current market situation in relation to the destination - e.g.: current market performance – volume and value; main source markets (countries); split by method of transport (air/sea arrivals); party size; seasonality; visitor profile (demographic, psychographic); travel behaviour; market barriers; – where such data exists.

- Marketing objectives (from Santorini example):

  o To increase revenue from higher-spending, longer-staying visitors;

  o To extend the season into the shoulder and off-season months;

  o To maximise revenue and minimise the impact of cruise visitors.

Marketing strategy – (from Santorini example):

Marketing effort should be invested where it can make most impact, in the short-medium-term. Development efforts should focus on the short-medium-long-term, in order to create circumstances that will eventually warrant further marketing, which is only likely to be warranted in the medium-term, once appropriate developments are in place (e.g. attracting new/extended direct off-season air routes, developing off-season products and packages).

Example: Strategic Marketing Approach – Santorini

In pursuit of the marketing objectives outlined above, five strategic marketing approaches were identified for Santorini and prioritised over the next 5 years as follows:

- **Priority 1: "Invest and Grow" (Years 1-5 ongoing)**

  Marketing investment should be focused on those segments currently offering the greatest potential – investment for growth over the short-medium term.

- **Priority 2: "Persuade and Build" – Off Season (Years 1-2: development; years 3-5 marketing)**

  Airlines need to be persuaded to fly into Santorini beyond the main season and tourism businesses need to see the potential benefit in staying open. Once this visitor infrastructure is imminent, the focus should shift to building shoulder-off-season traffic through targeted off-season marketing.

- **Priority 3: "Maximise Revenue/Minimise Impact" (Years 1-5 ongoing)**

Existing segments, which are significant but offer lower growth potential, should be nurtured, but marketing investment should be minimal, other than via the travel trade. Effort should be focused on managing visitor flows and minimising their impact (e.g. cruise), rather than on increasing them through marketing.

- **Priority 4: "Long-Term Future Development" (Year 3 onwards)**

New, longer term market opportunities exist, if Santorini can develop new products to appeal to a wider range of high-spending markets (e.g. wellness and luxury-seekers – "sybarites"). The current focus should be on developing such products; marketing to these potential new markets will not be appropriate until a sufficient number of suitable premium products are in place – hopefully in three years' time.

Target Markets and Segments

Market segments should be identified and prioritised according to their ability to deliver against the marketing objectives outlined above, taking into account their potential lifetime value and contribution to sustainability of the destination, by geographical, demographic and psychographic/motivational characteristics (e.g. "Romantic Escapers/ Honeymooners" from Italy, UK and Germany; "Foodies" from Italy, UK, USA).

Marketing Tactics – Marketing Action Plan

Marketing tactics should be identified in the marketing action plan to target each segment. The marketing action plan should also include SMART (specific, measurable, achievable, relevant, timed) targets as far as possible, plus key performance indicators for measuring success, and provide indicative resource implications for each activity. See example of Santorini marketing plan in Annex 4.

3.5 Visitor Experience and Product Development

Many of the actions identified within the DMP will relate to the development of visitor experiences and products.

Developing sustainable tourism in any destination depends, in part, on creating visitor products/experiences that appeal to the types of visitor the destination wants to

attract. These should be based on and reflect the destination's brand narratives, so they offer locally unique experiences for visitors, which reinforce the destination's distinctiveness. The initial product/experience assessment, stakeholder consultation, consumer research, and external market trends assessment (see Section 2 above) will identify where existing experiences fall short and are in need of improvement and where new products/experiences are required. The Rhodes 'visitor experience pyramid' below, illustrates how themed experiences can be constructed, incorporating stories and building on local events and products to make these experiences both unique to the destination and appealing to visitors.

Example: Rhodes Visitor Experience Pyramid

The basis for the experience development framework is a 'visitor experience pyramid' for Rhodes, as shown in the diagram below. Starting at the top with the brand promise, each layer below supports and elaborates on the one above. At the centre are Rhodes' 'signature experiences', in the form of a series of routes, which represent the heart of the proposition
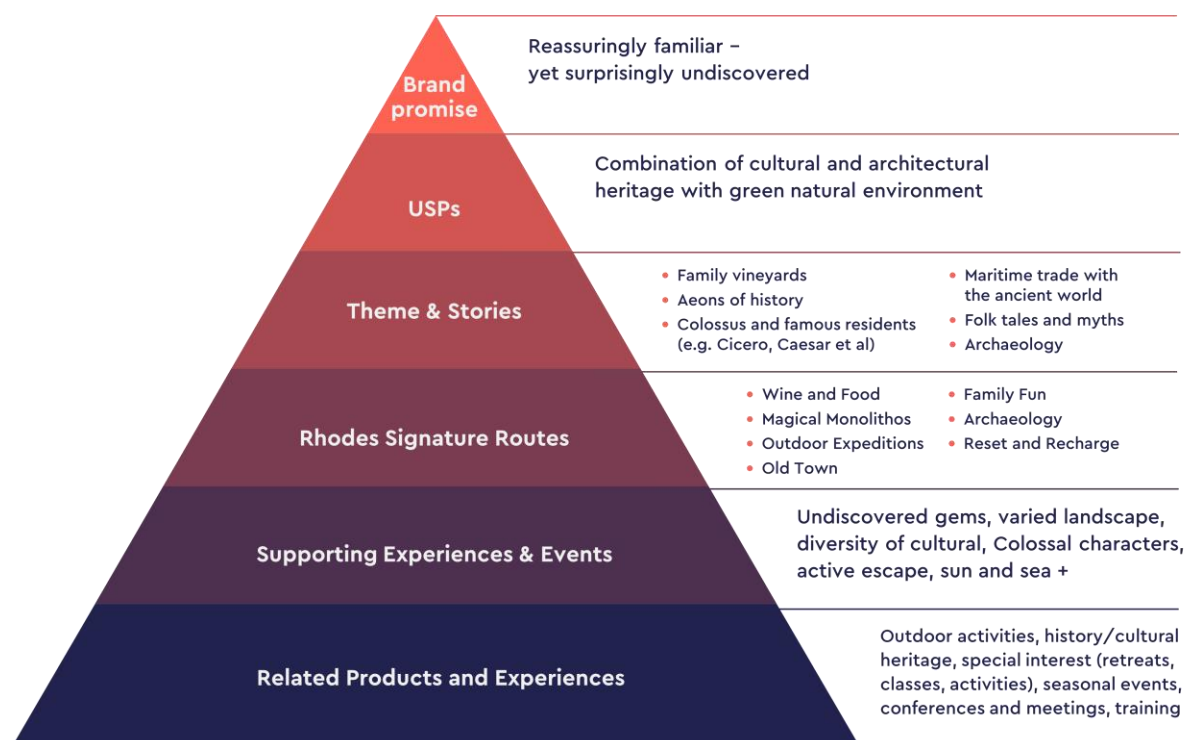
In the Rhodes' DMP, the proposed brand promise is simple: although the destination is familiar to many in these markets as a main season sun and sea destination, there is still much to be discovered beyond the beach in the main season, but also, importantly, in the off-season. In both main and off seasons, the "undiscovered" appeals of Rhodes are primarily its cultural heritage and adventure activities, which are spread throughout the island. The unique selling proposition (USP) for Rhodes is the contrasting combination of a green and predominantly rural island with a culturally and architecturally rich heritage, which is both vibrant (urban) and tranquil (countryside).

Themes for experience development across the island can be derived from its rich culture and history, its imposing ancient heritage, its natural beauty, its tranquil rural scenery and its outdoor activities. There are many stories to be told of Rhodes through the ages, influenced by different peoples, of maritime trade, famous residents, folktales and myths, and of a globally famous wonder of the ancient world, whose fame spawned a new word in many languages and a concept, whose origins in ancient Rhodes deserves to be recognised more widely – Colossus.

To realise the opportunities arising from the richness of this heritage, the concept of **Rhodes' 'Signature Routes'** was developed. These routes are designed to highlight key existing and potential authentic experiences of outstanding quality around the island. Initially, seven possible routes around Rhodes were identified, to fulfil the experience needs of the priority market segments defined above for extending the season.   These routes, linking experiences all around the island, will help to spread visitor time and spending into communities across the island, creating positive economic impacts for local communities and reducing peak season pressure points.

3.6   Monitoring

Progress against the DMP's Strategic Objectives and Action Plan should be monitored on an ongoing basis and adjusted where necessary. The Action Plan should identify performance measures, which should be initiated at the same time the actions are implemented. Key performance indicators should also established, which will enable the implementation body to evaluate progress against objectives.

In addition to ongoing monitoring of activities, a review of progress against the strategic objectives should be undertaken at least annually and the DMP revised

according to lessons learnt, changed circumstances, or revised objectives. The review should result in an annual report to inform all stakeholders.

Perhaps most important of all is to have **simple measures of overall success** in terms of **sustainability**, relating to the four tourism vectors of interest; for example:

- **Community**: perceptions of the net impact of tourism on the community, through an annual survey open to residents; using a scale of -5 to + 5. This could be done for perceptions of tourism overall or of specific aspects of tourism.

- **Industry**: perceptions of the net value of tourism to the business and to the community, through an annual survey open to the tourism businesses; using a scale of -5 to + 5.

- **Visitors**: satisfaction of visitors (especially from priority target markets) with their experience of the destination, measured through regular post-visit online surveys, using a 10-point satisfaction scale; and likelihood of recommending the destination to others, also on 10-point scale.

- **Environment**: with specialist advice, one or two simple measures of environmental quality should be identified, to act as a proxy for other, more scientifically complex measures.

3.7   Governance Options for DMP Implementation

The Value of Destination Stewardship

Implementing a DMP will require continuing work in leveraging resources, enabling adaptive planning in the light of new facts, and ensuring long-term commitment to the plan's aims and objectives. Tourism development can benefit a broad spectrum of communities in a destination, provided that local authorities, the tourism industry, visitors and residents interact in a constructive and collaborative way.

For Destinations International[9], 'Destination Stewardship' is the capacity of DMOs to make the most of their expanding role in tourism development and community engagement by:

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[9] Destinations International (2019) Destination Next Futures Study 2019 - A Strategic Road Map for the Next Generation of Global Destination Organizations.

"Promoting visitor experiences and destination brand qualities that are aligned with the mandate of balancing economic development, sustainable tourism and quality of life. Building public support around a shared vision for the future to accelerate destination management initiatives, secure funding and improve the sense of the place."

The Governance and Funding of Destination Management

An effective governance structure is critical for the successful implementation of a destination management plan. Various models exist around the world, most of which involve collaboration between senior officials in both local government and tourism-related associations or businesses.

The recent experience from Rhodes and Santorini suggests that DMP implementation must be underpinned by a governance structure that encourages different types of synergies. Not only is a collaborative approach less susceptible to weaknesses and pitfalls than a series of business models mainly based on the exclusive involvement of public or private sector stakeholders (e.g. financial constraints, failure to secure widespread commitment by individual businesses). It can also provide a guide for identifying partnership-building solutions based on place-specific conditions with regard to local/regional administration and business community activity.

Three scenarios have been identified in which public and private sector stakeholders can work together in Greek destinations and make progress on delivering the strategic priorities of a DMP.

The first scenario assumes that one or more, public and/or private sector stakeholders create a <u>new entity</u>. Such a scenario would probably involve a leading role for public sector stakeholders in a partnership with the private sector and NGOs with capacity to mobilise substantial funds, shape an inclusive agenda of destination management planning and engage a highly-skilled workforce. However, it would also require significant amendments to legislation (e.g. relating to the national framework for public and private partnerships[10] or to exceptions of special purpose included in framework for

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[10] Law 3389/2005 as amended by Law 3463/2006.

development companies at the local level[11]) and potentially time-consuming processes for establishing a new, strong entity.

The second scenario assumes that key responsibilities for implementing a DMP are allocated to an <u>existing organisation</u> at the regional or local level. Solutions here would vary among different destinations based on the capacity of public and/or private sector stakeholders to support them. According to circumstances, it could be, for instance, an experienced Directorate of Tourism under the Municipality, a company controlled by a Region or Municipality or a development company under a Chamber of Commerce. In the case of Rhodes, for example, the options include:

- DERMAE INC, a company fully owned by the Municipality of Rhodes with a portfolio of tourism-related activities, including management of the cultural monument of Kallithea Thermal Springs could take on the role of DMO. However, it would face challenges in terms of assuming the role of the DMO, because this type of municipal company is not allowed to sign programmatic agreements[12] - thus it would face limited access to funding.

- The '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, would be able to assume an active role if the company's statute was revised. That would involve incorporating a series of provisions for tasks related to the DMP's implementation (training services, co-funding programs, business advice, entrepreneurial innovation programs); a series of tasks that would be consistent with the most recent modernisation of legislation on chambers and their companies[13]. DETAP would then work closely with the municipal Directorate of Tourism, the Region of South Aegean and other local stakeholders.

- The Region of South Aegean's Development Agency – "ENERGIAKI S.A." – and its Directorate of Tourism could define another framework for DMP implementation. Operating under the umbrella of the Directorate, the development company would act as a vehicle for mobilizing domestic and EU funds towards Rhodes. The Region would then work closely (e.g. through programmatic agreements) with the Municipality of Rhodes (including its Directorate of Tourism) and local stakeholders on selected actions.

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[11] Law 3463/2006 as amended by Law 3852/2010 and Law 4555/2018.

[12] Law 3463/2006 (Article 265, Paragraph 4).

[13] Law 4497/2017

A strong role for public sector stakeholders would shape an inclusive agenda of destination management planning, touching on all types of economic, environmental and social issues. It would also obtain access to diverse resources of funding and the benefit of time-efficient processes for organisational restructuring. Nevertheless, it would also entail disadvantages such as time-consuming processes for project implementation (e.g. because the legality of programmatic agreements is subject to the scrutiny of the Court of Audit) and staff recruitment taking place strictly under the public sector's umbrella.

The third scenario involves lighter and more flexible governance structures than the other scenarios. Particularly instructive here is recent experience from *This is Athens & Partners*, a public-private partnership formed by the joint forces of the City of Athens, Aegean Airlines, Athens International Airport and the Greek Tourism Confederation (SETE). *This is Athens & Partners* rely on the voluntary engagement of partners from the public and the private sector, with mutual agreement on a strategic agenda and individual commitment to a group effort, whereby each partner's expertise is deployed most appropriately and efficiently. Besides a high level of consensus, corporate ethics, and trust among founding partners, similar initiatives among other destinations in Greece would require additional arrangements for enabling good governance and DMP implementation (e.g.):

- A 'Memorandum of Understanding and Cooperation' to define the scope and terms of a partnership, the key activities that each founding partner would undertake, their fixed amounts of annual contributions for an agreed period of time, and all obligations and benefits associated with being a founding partner.

- Key mechanisms to facilitate collective decision-making, program implementation, evaluation of results, and the sound management of financial and human resources.

- A team of dedicated experts including both new recruits (to be employed by one of the founding partners) and existing staff members from one or more founding partners to support DMP implementation.

- A second level of partnership members, to enable the private sector's active involvement in the scheme based on the same principles and lighter terms of engagement.

- Framework of funding sources and fundraising options/processes.

A high level of private sector engagement would entail a more balanced distribution of funds between the public and the private sector from the beginning. It would also facilitate staff recruitment under the umbrella of ambitious brands with influential partners and the utilisation of the private sector's communication skills and activities to the benefit of the public sector. Perhaps the biggest challenge under this scenario is also the most essential prerequisite: all partners should act for the benefit of the partnership under different circumstances (e.g. negotiating with external groups, signing contracts and carrying out activities individually so as to serve the collective purpose, aligning individual strategies with the wider scope of the partnership). Thus, a high level of consensus and trust among key stakeholders and/or individual businesses would be essential, in order to compensate for implications arising from the lack of legal entity status.

None of these scenarios is absolutely exhaustive. A mixed approach could be sought in specific cases (e.g. a MoU, in tandem with a more active role for the South Aegean Region Development Agency). What is crucial when an analysis of local conditions begins is that it must take account of the ongoing plans of key stakeholders and identify organisations with an advanced capacity in terms of areas of activity, access to funds and human resources.

3.8   Destination Insights

The inclusion of examples, illustrating how other destinations have addressed particular destination management challenges, can be helpful and inspire confidence amongst destination stakeholders in implementing particularly challenging aspects of the DMP. Some examples are included in Annex 5.

CHALLENGES IN PREPARING A DMP

4. Challenges in Preparing a DMP

Various challenges may arise before, during and after the preparation of a DMP. They include:

- **Time frame:** To undertake effectively the process set out above is likely to require at least six months. If the work has to be done over the main tourism season, when many stakeholders will be fully occupied, this will be challenging and will require a high level of commitment from all the key stakeholders. What is your deadline? What factors affect it and which are fixed and which flexible? What steps can be undertaken simultaneously and which depend on others being completed before they can be undertaken (e.g. strategic priorities cannot be defined before research and consultation has been undertaken and analysed). How realistic is it, taking into account the issues below? Plan your timeframe working backwards from your deadline, taking sequencing, resource limitations, stakeholder availability and consultative processes into account.

- **Stakeholder participation and buy-in:** Securing participation by stakeholders in the development of the DMP is critical. If they do not feel committed to it, they are unlikely to adopt and implement it. This requires their active involvement from the outset, through initial consultation and at critical points in the DMP development.

- **Stakeholder availability:** Most stakeholders will be busy people, whether business people, public servants, politicians or people in other influential positions. In addition, public holidays, the holiday season and busy periods (e.g. June-Sept/Oct for inbound tourism operators) need to be considered in planning milestones for DMP deliverables. These factors can add considerably to the time needed to develop a DMP, particularly where feedback is required from stakeholders or getting them together in a workshop is required.

- **Resource availability:** Both the human and financial resources required to develop a DMP need to be identified in advance and made available at the times during the process when they are needed.

- **Implementation failure:** Resources are needed not only to prepare the DMP but also to implement it. A fine plan could end up on a shelf, if there is insufficient stakeholder commitment to it, inadequate funding or inappropriate skills to implement it. Stakeholder commitment, critical skills and essential funding need to be secured from the outset, as described above.

- **Changing circumstances:** A variety of circumstances can change the validity of the DMP approach and proposed actions – from economic and political upheaval, through technological and legal change, to natural disasters and market transformation. As a 'live' document, the DMP should be capable of adapting to any such change in circumstances from whatever direction. The economic, political,

social, technological, environmental, legal and market context in which the DMP operates should be monitored on an ongoing basis and any necessary changes addressed as soon as they become apparent.

- **Communication and credibility:** In order to maintain stakeholder commitment and ensure credibility amongst stakeholders and communities, regular communication will be essential about the aims of the DMP, progress in its development and, ultimately, successful elements of its implementation.

It is sensible, in advance of starting work on the DMP, to identify the main risks involved and clarify what steps might be taken to mitigate these risks.

The DMP should conclude by identifying the factors that are critical to realising the Vision and implementing the actions. For Greek destinations, these may include:

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

- Full and active engagement of the Regional and Municipal Authorities, whose combined, extensive range of responsibilities and functions are of fundamental importance.

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

- Involvement and support of all tourism-related sectors of the economy, primarily through the medium of a body such as the Chamber of Commerce.

- Close collaboration of all other key stakeholders, including those responsible for transportation (particularly airport, ports, roads and parking), infrastructure and utility services.

- Securing the understanding of the people and communities of the destination to the Vision and Strategic Priorities of the DMP; and their active engagement in its implementation.

- 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.

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

ANNEX 1

DESTINATION MANAGEMENT TRENDS AND CONTEXT

Annex 1 - Destination Management Trends and Context

Destination management, which focuses holistically on all aspects of the destination, from a strategic approach to product and experience development to sales and marketing, is a key transformational opportunity for destinations. Critical roles for DMOs have been identified as follows[14]:

- Curators of destination content;

- Activists in community in place-making;

- Catalysts of economic development;

- Adopters of business intelligence & data science;

- Collaborators within strategic networks.

Among top destinations, the rapid growth in demand has cast doubts on the traditional mission of destination marketing. A report by European Cities Marketing in 2017[15], proposed that destination marketing organizations should consider how destination management might:

- Enable social sustainability by engaging more closely with local communities;

- Guide a smart approach to place-making, by managing carefully the most authentic elements of destination brands and maintaining the attractions of 'liveability' and 'localism';

- Extend the benefits of tourism beyond the main hotspots by helping people to move, learn, meet, relax and integrate;

- Provide alternative options for the allocation of public; funds derived mainly from bed taxes[16];

- Shape a more inclusive agenda for public-private partnerships such as Tourism Improvement Districts, an industry-led funding model in which tourism-related

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[14] Destinations International (2017) A Strategic Road Map for the NEXT Generation of Global Destination Organizations.

[15] European Cities Marketing (2018) What's next for DMOs?.

[16] Destinations International (2018) Destination Organization Performance Reporting.

businesses commonly contribute to a fund and in which DMOs have the jurisdiction to manage funding and implement a dedicated program[17];

- Clarify priorities for the smooth integration of the collaborative economy in contemporary destinations;

- Create solutions both for visitors and residents through the use of new technologies;

- Set the foundations for quick response and recovery in case of emergency or disaster.

In 2018, European Cities Marketing[18] proposed ten tools that represent a range of tactics DMOs can use to get the best out of tourism growth:

- Strategy formation, city planning and zoning;

- Public education;

- Forming partnerships;

- Managing the collaborative economy;

- Smart marketing;

- Taxes, caps and limitations;

- On-the-ground visitor management;

- Measurement and monitoring;

- Technological solutions;

- Dialogue and consultation.

In two reports in September 2018 and March 2019[19], the World Tourism Organisation (UNWTO) identified 11 strategies and a range of destination management solutions that are being implemented by 19 cities across the Americas, Asia/Pacific and Europe:

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[17] Economic Development Resource Centre, University of Greenwich (2016) Business Improvement Districts and the Visitor Economy

[18] European Cities Marketing (2018) ECM launches a Toolbox for Managing Tourism Growth in Europe.

[19] UNWTO (2018) 'Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perceptions, Executive Summary; UNWTO (2019) 'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions Volume 2: Case Studies | Executive Summary.

	Strategies	Indicative Measures Implemented in Global Cities
1	Promote the dispersal of visitors within the city and beyond	a. Development of new products /experiences in less visited areas b. Develop urban structures to avoid incorrect parking
2	Promote time-based dispersal of visitors	a. Liaising with cruise companies b. Organisation of events in the shoulder season
3	Stimulate new visitor itineraries and attractions	a. Improve guided tours: extend schedules, energize them differently, offer self-guide tours, etc. b. Development of interactive maps
4	Review and adapt regulation	a. Stricter rules for guided tours b. Urban zoning plans to balance economic activity
5	Focus on target segments	a. Segmentation by origin markets b. Customer segmentation according to dominant travel needs
6	Ensure local communities benefit from tourism	a. Boost and improve the signs of shops b. Promote local products of added value c. Organise events linked to the local culture
7	Create city experiences that benefit both residents and visitors	a. Stimulate communities and individual to create authentic experiences for visitors b. Support the provision of arts culture and entertainment facilities.
8	Improve city infrastructure and facilities	a. Enhance attractiveness of public domain b. Expansion of pedestrian corridors c. Development of a citywide free access Wi-Fi
9	Communicate with and engage local stakeholders	a. Regular meetings with all stakeholders b. Create website for tourism businesses. c. Campaigns to communicate benefits from tourism and progress on destination management issues
10	Communicate with and engage visitors	a. Awareness campaigns b. Informative visitor information centre
11	Set monitoring and response measures	a. Destination Scorecard that assembles data to establish a baseline set of measures, service performance and record experiences.

ANNEX 2

POLITICAL, ECONOMIC, SOCIAL, TECHNOLOGICAL, ENVIRONMENTAL AND LEGAL CONTEXT (PESTEL)

Annex 2 – Political, Economic, Social, Technological, Environmental and Legal Context (PESTEL)

An analysis of external political, economic, social, technological, environmental and legal (PESTEL) trends is fundamental to set the scene within which a DMP is being developed. It is important to identify those trends that might have a positive or negative impact on Greece and, where possible, to articulate how they might affect Greece, or specific destinations in Greece.

A PESTEL analysis should be tailored so it is relevant to the destination in question. An example of a PESTEL analysis for Greece, as at Oct 2019, might include:

P - Political

The tourism sector has contributed to political and social stability throughout the economic crisis: Throughout a decade of austerity, the tourism sector has been a driving force, providing Greece's economy with much needed revenues and employment opportunities. All types of tourism businesses have a share in this achievement, despite the heavy tax burden, both in terms of direct and indirect taxes, which has affected the development of tourism and the economy in general (SETE, 2018).

Geopolitical uncertainty: Ongoing political tension between Greece and Turkey and a continuing flow of refugees and migrants contribute to an unsettled political environment in the Mediterranean in general. Islands closer to Turkey and on migrant routes risk bearing a greater burden, in terms of both potential restrictions on areas accessible to visitors and perceptions of risk in source markets.

Greek Tourism Ministry strategic focus: The Greek Tourism Ministry policy agenda for the diversification of Greece's tourism sector through thematic and special interest tourism sets the tone for product development and marketing focus. [See bill (4582/2018) passed by the Greek Parliament in 2018 (see also L-Legal in PESTEL)]. This strategy includes a focus on developing health and wellness tourism. Following the demise of Thomas Cook in Oct 2019, the Greek Tourism Ministry undertook a strategic reprioritisation, which, among other issues, emphasised a focus on attracting 'affluent travellers'.

E - Economic

The direct contribution of tourism varies significantly among regions: The total (direct and indirect) of travel and tourism to Greece's GDP accounts for 20.6% (WTTC, 2019), but it is always important to put the sector's regional effect in perspective. In 2014, there were 3 areas where the direct (exclusively) contribution of tourism exceeded by far the national average of 9.5%; the Region of Crete (47.3%), the Region of Ionian Islands (65%) and the Region of South Aegean (69.5%) (SETE Intelligence, 2017).

The structural characteristics of Greece's tourism sector are well established: Less than 1 in 5 overnights in hotel accommodation establishments were attributed to domestic visitors in 2017. Also, in relation to the sector's seasonality, only 20% of hotels had occupancies higher than 80% in May 2018. The respective share in August 2018 was 65%. Also, the economic crisis has had a severe effect on domestic tourism. In 2017, hotel overnights by domestic visitors accounted for only 16% compared to 26% in 2010 (Hellenic Chamber of Hotels, 2019).

Summer demand for air seats to Greece slowed down for 2019: Brexit-related uncertainty, the dynamic return of Turkey as a destination with very competitive prices, and a relatively warm summer in Europe last year that affected the travel behaviour of holidaymakers this year, are key factors behind a -7% drop in demand for air seats to Greece this summer (-4% in Rhodes's airport and -3% in Santorini's airport) (SETE Intelligence, 2019). What remains to be seen is whether slowdown in eurozone growth will occur as projected (IMF, 2019), and in this case, how it will influence inbound tourism in Greece.

Countries	IMF Real GDP Annual Changes (April 2019 figures)		
	2018	2019 Projection	2020 Projection
United Kingdom	1.4%	1.2%	1.4%
Germany	1.5%	0.8%	1.4%
France	1.5%	1.3%	1.4%
Netherlands	2.5%	1.8%	1.7%

Belgium	1.4%	1.3%	1.4%
Switzerland	2.5%	1.1%	1.5%
Austria	2.7%	2.0%	1.7%
Italy	0.9%	0.1%	0.9%
Spain	2.5%	2.1%	1,9%
Denmark	1.2%	1.7%	1.8%
Norway	1.4%	2.0%	1.9%
Sweden	2.3%	2.2%	1.8%
Finland	2.4%	1.9%	1.7%
Poland	5.1%	3.8%	3.1%
Czech Republic	2.9%	2.9%	2.7%
Russia	2.3%	1.6%	1.7%
Israel	3.3%	3.3%	3.3%
USA	2.9%	2.3%	1.9%
Australia	2.8%	2.1%	2.8%
China	6.6%	6.3%	6.1%

Thomas Cook collapse will hit Greek tourism: The recent collapse of Thomas Cook, one of Europe's largest and oldest travel companies, will have significant effects on the Greek tourism industry, as a result of its high level of exposure to both the outbound UK market and to Thomas Cook specifically. The company is believed to have employed c. 1,000 people in Greece and brought c. 3 million tourists to the country, 9 percent of the total 44 million arrivals to Greece in 2018[20]. Of Greece's 9,917 hotels, 12 percent (1,193)

[20]Greek Travel Pages (2019) Moody's Says Thomas Cook Collapse May Take Toll on Greek Banks (July 27).

held partnership deals with the Thomas Cook Group in 2019[21], of which 48% of are in the 1-3 star categories. Areas most affected are the South Aegean and Ionian islands, not least Crete, where 80% of the island's hotels[22] had contracts with this company. Greece is expected to lose c.610,000 inbound airline seats[23], of which about 61,000 in Rhodes. According to the Hellenic Chamber of Hotels, the impact on the Greek tourism industry of losses of arrivals and overnight stays resulting from the Thomas Cook collapse is expected to amount around €1 billion in 2020. The full extent of damage will be calculated by the Greek government[24] by the end of 2019.

S - Social

The consumption of destination experiences varies based on the diverse attitudes and expectations of each generation: With consumers increasingly preferring experiences over possessions, travellers can pursue tailor-made experiences, which include several different elements (e.g. culture, heritage, countryside, local neighbourhoods) and qualities (Euromonitor, 2017). Millennials constitute a typical example of this diversity. They have come to be the driving force behind food tourism, insofar as its experiences provide value for money, touch on contemporary trends (e.g. veganism) and involve practices of social corporate responsibility (in food production, waste management, etc.) (Global Data, 2018). Several different tourism businesses (e.g. hotels, restaurants, tour providers) are required to keep in touch with this diversity given the high appraisal of food tourism experiences by international visitors in Greece (SETE, 2019).

Travellers are becoming age-agnostic: As people tend to live longer and have more active lives, the traditional interpretation of key life stages is becoming insufficient to capture people's needs and desires. Rather than focusing on age, it is becoming more relevant to think about travellers in terms of their interests. With almost a third of

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[21] Greek Travel Pages (2019) OAED: Scheme to Secure Jobs for Greek Tourism Businesses after Thomas Cook Ruin (October 3)

[22] Greek Travel Pages (2019) Impact of Thomas Cook Collapse on Crete – Governor (September 24)

[23] Greek Travel Pages (2019) Thomas Cook Default Impacts 38 Countries, 8.6m Flight Seats (October 2)

[24] Greek Travel Pages (2019) Greece's Thomas Cook Repatriation Operation in Full Swing (October 1)

everyone on the planet being over the age of 50 by 2025, travel brands should be creative in approaching those who have an active attitude towards ageing and wish to take better care of their health, appearance and wellbeing (Euromonitor, 2019). This has signifgicant implications for businesses in Rhodes, where 50+ travellers are a key market segment (Region of South Aegean and SETE Intelligence, 2015; Rhodes Hotel Managers Association, 2018).

Luxury travel growth: The luxury market is expected to grow significantly worldwide. It is forecast to grow at a compound annual growth rate (CAGR) of 7.9% by 2026. Estimates suggest an almost doubling in value, from $891 billion in 2018 to $1,614 billion by 2026. Europe and America accounted for the largest segment of this market in 2018 at 63%.[25] In terms of type of travel, 'adventure and safari' travel lead this market, but they are followed by 'culinary and shopping' and 'small group journeys' as the next most dominant segments.[26]

T- Technological

Booking In-destination experiences goes online: Despite the growing desire of consumers and travellers for unique and authentic experiences, in-destination experiences are increasingly available through a variety of online booking channels (e.g. Trip Advisor, Viator, Expedia, Get Your Guide). Skift (2018) estimated that 35% of travellers have used mobile phones to book a tour or activity while already in destination for a vacation.

Several different technologies currently shape the future of travel: Besides the effect of the Internet of things, voice technology, automation and blockchain, big data and artificial intelligence already drive innovation in the personalisation of travel experiences. This is happening through chat platforms that operate as virtual assistants, and machine-learning expertise that helps decision-makers make sense of volumes of unstructured travel data (e.g. photos, video, social network data and natural language) (Deloitte, 2018).

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[25] Allied Market Research (2019) Global Luxury Travel Market Expected to Reach $1,614 Billion by 2026.

[26] Allied Market Research (2019) Luxury Travel Market Outlook-2026.

1 in 5 Europeans are familiar with booking accommodation through the collaborative economy's platforms: In 2018, 19% of individuals in the European Union (EU) arranged accommodation (room, apartment, house, holiday cottage, etc.) via websites or apps from another private individual for private purposes (European Commission, 2019). The significant growth of short-term rentals in Greece is associated with rising housing costs (Hellenic Chamber of Hotels, 2019), while online travel agents such as Booking.com increasingly compete strongly with Airbnb-style platforms.

E - Environmental

The environmental costs of tourism development remain largely unaddressed in destination management: Calculations of the contribution of tourism to global carbon dioxide (CO_2) emissions range from 3.9% to 6% of human emissions. If the sector continues to grow by more than 4% annually (+6% in 2018), its emissions are on course to grow 130% between 2005 and 2035 (University of Cambridge, 2017). The sector involves several other operational externalities (e.g. Greenhouse gas emissions, restoration of ecosystem services, renewable energy cost) which typically remain unaccounted as costs related to environmental protection work in national and municipal budgets (The Travel Foundation, Cornell University and EplerWood International, 2019).

Visitor attractions find themselves under pressure in light of growing visitation and climate change-related phenomena: The impacts of tourism/visitor recreation are negatively affecting the outstanding universal value of 1 in 4 World Heritage Sites in Europe (UNESCO and United Nations Environment Programme, 2016). Also, management plans for visitor attractions along with national and regional tourism development strategies, with very few exceptions, have not yet managed to address climate change impacts.

Consumer consciousness is changing travel behaviour: Concern for the environment is contributing in some countries to changes in travel behaviour. "Flygskam", or "flight-shaming" is a movement that is gaining traction as climate change awareness increases. This Swedish word has entered the vocabulary of other countries and, according to a

recent UBS survey[27], could trigger a change in flying habits in wealthier parts of the world, particularly in the US and Europe. High-profile campaigns – such as the example set by Swedish schoolgirl Greta Thunberg, has helped push the climate crisis up the political agenda. After surveying more than 6,000 people in the US, Germany, France and the UK, UBS found that 21% had reduced the number of flights they took over the last year.

The tourism sector has a long way to go to become plastic-free: Holidaymakers cause a 40% spike in marine litter in the Mediterranean each summer, though Greece dumps fewer plastics (39 tonnes / day) into the Mediterranean than Turkey (144 tonnes/day), Spain (126), Italy (90), Egypt (77) and France (66) (The Guardian, 2018; WWF, 2018). TUI Cruises and Ryanair are key travel brands that have already made a pledge to become 'plastic free' by the early 2020s', and this could be also an objective for big and small enterprises.

Legal

The enforcement of regulations on short term rentals in Greece is underway: As of January 1 2018, all hosts leasing or subletting a property in Greece through Airbnb or other platforms of the collaborative economy are required to register with the Independent Authority for Public Revenue and submit on a regular basis information about their tenants and revenues (mainly based on Law 4446/2016 and a series of subsequent decisions). These regulations are similar to measures introduced in several European countries from 2015 onward, and they are also consistent with the policy principles and good practices identified by European Commission in October 2018. Some of the measures that are reportedly under scrutiny would allow a single host to lease only two properties for no more than 90 days per year, and only hosts with annual income from rentals under 12,000 euros could lease their properties longer than the respective cap.

Policy-makers and tourism stakeholders have to be aware of ongoing, EU policy debates: In April 2019, an adviser for the European Court of Justice said that Airbnb constitutes an information society service, whose digital operation across the European

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[27] BBC News (2019) ['Flight shame' could halve growth in air traffic](#) (October 2).

Union (EU) is consistent with EU's free movement of information. Although this opinion is not binding on the Court of Justice, a possible approval would mean that any restrictions by Member States should only be considered on a case-by-case basis, on the grounds of protecting consumers and that the European Commission and Ireland, the Member State of Origin for Airbnb, should be informed (Court of Justice of the European Union, 2019).

Thematic and special interest tourism is the key for the diversification of Greece's tourism sector: In December 2018, the Greek Parliament passed a new bill (4582/2018) which sets the standards for the further development of cultural, faith, health and wellness, agro, food and wine, sports, city and educational tourism. These include accreditation systems for wine tourism (Law: 4276/2014 & Inter-ministerial Decisions: 1746/2015 & 13143/2018) and agro-tourism (Inter-ministerial Decisions: 543/34450/2017 & 15258/2018), which were created over the last three years. It remains to be seen if the most recent bill will encourage something similar for other types of business (e.g. accreditation for businesses specialised in sports tourism).

Lifting of capital controls

The government's proposed lifting of capital controls in 2019 may generate opportunities for Greece to attract investment in targeted areas, from infrastructure development to new products compatible with Greece's, and various Greek destinations', aspiration to attract the type of visitors they want to underpin sustainable growth.

ANNEX 3A

ACTION PLAN TEMPLATE
CORE VERSION

Annex 3A: Action Plan Template (Core Version)

<u>Extract from Santorini Action Plan.</u>

This (core) version shows summary information relating to actions proposed, before governance and resource implications are clear. These are (from left to right): action area (general), actions (specific), responsibility for action (lead), and performance measures to measure progress against each action.

Once governance and resource implications are established, a more detailed action plan should be developed, which includes: targets, lead and support responsibilities, more specific key performance indicators, and resource implications (human and financial) – See Annex 3B below.

Ideally, it should be possible to develop a detailed action plan (Annex 3B) from the start, as long as governance arrangements for destination management plan development and implementation and likely funding sources are relatively clear. However, if they are not yet clear, a shorter version (Annex 3A) can nevertheless set out a menu of proposals for action, which will need to be decided upon when governance arrangements and likely funding sources become clear.

<u>DMP Action Plan for Santorini</u>
Strategic Priority 1: Making Santorini Sustainable for the Decades to Come

Action Area	Actions	Suggested Lead	Performance Measures
Independent, scientific assessment of the carrying capacity[61] of Santorini and of Oia and Fira	• Commission scientific assessment of the **island's carrying capacities** in critical areas, from acknowledged expert. • Create local **register of capacity of tourism suppliers** – operators' licenses for all types of accommodation establishments, food operators, rented cars/motorbikes, etc. • Develop a short **registration information document** to demonstrate to industry operators the benefits associated with official registration under the terms of the DMP.	South Aegean Region/ Santorini Municipality/Cyclades Chamber	• 1 study delivered in time with practical recommendations. • Register created in time, with all relevant businesses included. • Information document created, with helpful and persuasive content, in time.
Action to ensure that tourism volumes relate to carrying capacity	• **Consultation with cruise lines** to achieve mutually acceptable, sustainable balance between cruise viability, passengers' enjoyment of Santorini, and residents' tolerance. Review and decide on issues emerging from the recent public consultation with local stakeholders on the prioritization of factors for the establishment/operation of the berth allocation system in Santorini (i.e.: cruise ship length and draught; time of cruise ship arrival; time of cruise ship departure; number of interport sailings; length of cruise ship stay; number of passengers (full ship capacity); number of cruise ship overnights at the seaport; flexibility of cruise ship companies to accept date changes; number of cruise ship visits in off-season; announcement time of a cruise ship visit; last year's number of cruise ship visits; average number of cruise ship visits per company during the last 3 years; special agreement with the seaport authority, number of cancellations.) • **Limit number of cruise ships per day** at peak times (e.g. 3-5, dep. on vessel capacity). • **Stagger cruise ship arrivals** throughout the day at peak times.	Santorini Municipality	• Effective, regular communication system in place. • Limit per day in place and enforced. • Staggered schedule in place and enforced. • Cap in place and enforced. • Embarkation/ disembarkation schedule in place and enforced. • Levy rate agreed and

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[61] 'Carrying capacity' taking account of quality of life (as per resident perceptions), quality of visitor experience, quality of environment, infrastructure constraints, etc – potentially using

ANNEX 3B

ACTION PLAN TEMPLATE
LONGER VERSION

Annex 3B –Action Plan Template (Longer Version)

Example from Santorini Action Plan, showing the type of information that a more detailed action plan should include, once the body responsible for implementing the DMP is established – i.e.:

- **Actions** proposed within each broad Action Area

- SMART (specific, measurable, attainable, relevant, timed) **targets** identified to achieve each action;

- **Responsibility** allocated to people or organisations for leading and supporting on the delivery of each action;

- **Performance Measures** reviewed and Key Performance Indicators decided to reflect targets agreed;

- **Resources** required to deliver each action – both financial and human – identified.

DMP Action Plan for Santorini
Strategic Priority 1: Making Santorini Sustainable for the Decades to Come

Action Area	Actions	Targets	Responsibility Lead	Responsibility Support	Key Performance Indicators	Resource/ Budget (Euros) est.
Independent, scientific assessment of the carrying capacity of Santorini and of Oia and Fira	• Commission scientific assessment of the **island's carrying capacities** in critical areas, from acknowledged expert. • Create local **register of capacity of tourism suppliers** – operators' licenses for all types of accommodation establishments, food operators, rented cars/motorbikes, etc. • Develop a short **registration information document** to demonstrate to industry operators the benefits associated with official registration under the terms of the DMP.	• 1 study, with clear recommendations by June 2020. • Comprehensive register created by Oct 2020. • Clear and persuasive document created by June 2020.	To be completed by LIB/DMO, in consult-ation with local stakeholders, once makeup of LIB and level of resources have been determined	To be completed by LIB/DMO, in consult-ation with local stakeholders, once makeup of LIB and level of resources have been determined	• 1 study delivered in time with practical recommendations. • Register created in time, with all relevant businesses included. • Information document created, with helpful and persuasive content, in time.	To be completed by LIB/DMO, in consultation with local stakeholders, once makeup of LIB and level of resources have been determined
Action to ensure that tourism volumes relate to carrying capacity	• **Limit number of cruise ships per day** at peak times (e.g. 3-5, dep. on vessel capacity). • **Stagger cruise ship arrivals** throughout the day at peak times. • Set **a cap on the number of cruise passenger disembarkations** per day at Fira (e.g. 5,000-8,000) and Athinios. • Develop a **schedule of embarkation and disembarkation times.**	• Agree limit per day in time for 2021 season and enforce it. • Agree staggered schedule in time for 2021 season and enforce it. • Agree cap in time for 2021 season and enforce it. • Agree embarkation/			• Limit per day in place and enforced. • Staggered schedule in place and enforced. • Cap in place and enforced. • Embarkation/ disembarkation	

ANNEX 4

MARKETING ACTION PLAN

Annex 4: Marketing Action Plan

Example of page 1 of Santorini Marketing Action Plan, showing (from left to right) how marketing activities flow from marketing objectives, target priority segments in which countries using which messages (related to 'main products/experiences'), plus the key performance indicators to measure progress and estimated human and financial resources required to implement them.

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 1: "Invest and Grow" (Years 1-5 ongoing)		"Foodies"	• Gastronomy • Wine	Primary • Italy • UK • USA Secondary • France • Germany • Switzerland • Austria • Netherlands	• Achieve optimum and appropriate coverage of Santorini in GNTO marketing communications. • Ensure GNTO marketing (website, campaigns, brochures et al) reflect Santorini brand values & narratives. • 3 social media campaigns (1 p.a. p. country - Italy, UK, USA). • 8 visits by food press/ bloggers/ influencers p.a. • Product representation in appropriately targeted and cost-effective niche domestic or international trade fairs. (e.g. https://www.fibega.org/, https://www.tourismexpo.ru/, https://www.anuga.com/) • Engage PR agency to develop campaign to target key publications, influencers, bloggers etc., particularly for major events.	• Optimal, appropriate and brand-compliant coverage of Santorini in GNTO marketing • Level of engagement, click-through to tourism operators, bookings • 8 positive articles by press/bloggers • Number of trade fairs attended; valuable contacts made. • Inclusion of Santorini in tour operators' programs, business resulting from fairs. • Trade-readiness, development and ongoing trade engagement. • Improvement in the positioning, awareness, engagement conversion of Santorini in primary and secondary markets.	• N/A (human resource only) • Euros 15,000 • Dep on number of fairs attended. • Included in PR agency costs per market above.

ANNEX 5

DESTINATION INSIGHTS

Annex 5: Destination Insights

Challenge: Visitor Management

Dubrovnik: Cruise Movements

In order to "preserve and protect" its cultural heritage, the city and Cruise Lines International Association (CLIA) have signed a Memorandum of Understanding (MOU) to establish best practices for long-term destination management. The city's mayor has introduced tighter controls, whereby only 2 cruise ships will be allowed to dock in the mornings, with a third permitted after midday. In 2020, a limit will be imposed of 4,000 cruise visitors per day allowed ashore. In two years' time a €2 tax will be applied to each passenger.

Amsterdam: Public Space Monitoring System

Amsterdam has developed an 'overcrowding in the public space' monitoring system, currently operating in two critical points of the city: the Red Light District and the main shopping street, Kalverstraat. The system uses Wi-Fi sensors and smart counting cameras, providing data on the amount and density of the visitor flow, which is used to create operational scenarios to manage crowds. The system is currently in a pilot phase. If successful, it will be rolled out across the rest of the city.

In addition, Amsterdam Airport is using the Veovo BlipTrack Guest Predictability system, based on a hybrid camera/Wi-Fi technology which helps the airport to mitigate overcrowding. Measuring the passenger flows provides a real-time picture of the movement and behaviours of the passengers through the airport and helps the airport to improve contingency planning[28].

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[28] *'Introducing Veovo, the Predictive Collaboration Platform for brilliant airport operations', Veveo (2018), available at* *https://blipsystems.com/introducing-veovo-the-predictive-collaboration-platform-for-brilliant-airport-operations/.*

Challenge: Short-Term Rentals Management

Short-term property rental has experienced a dramatic boom in recent years, with the leading player, Airbnb, offering 7 million listings in 100,000 cities worldwide. Many cities around the world have introduced limits to, and in some cases licensing of, short term rental properties. This has been driven by various concerns, particularly the fact that visitor demand, and the prices that visitors are prepared to pay, are resulting in substantial proportions of housing stock in the attractive areas being transferred to rental. Thus residents move out and visitors move in, impacting on community cohesion and reducing access to affordable residential housing. Some restrictions recently imposed on short-term rentals are outlined below.

Palma de Mallorca, Spain

Following a rise in rental prices by 40 percent between 2013-2018, with non-regulated tourist rentals up around 50 percent to close to 20,000, almost all short-term rentals were banned on the island in 2018. Short-term rental listings in apartment buildings are no longer legal. An exception is the rental of detached homes, as long as they are not on protected land, within a region around the airport, or buildings not designated for residential use.

New York, USA

Renting out an entire apartment for a stay of less than 30 days is illegal.
Even advertising such a rental is illegal, with fines up to $7,500. Hosts can also only list one home, their own home, at any one time.

Amsterdam, Netherlands

30 nights limit p.a. and a maximum of four adults at a time. To keep track, hosts have to register and report when travellers stay with them through the municipal government.

Reykjavik, Iceland

Ce. 30% of Iceland's guest accommodation is comprised of short-term rentals. Anyone may rent their residence for up to 90 days without having to register it as a place of business.

San Francisco, USA

Short-term rentals are limited to 90 days p.a. where the host is not present. Only permanent residents of San Francisco are allowed to be short-term hosts. Permanent residency requires a person to reside in their accommodation for at least 275 nights per year. Violators who rent out their apartments beyond the 90 days are subject to a daily fine of $484 for first offenders and up to $968 for repeat offenders. They are also required to collect the 14% San Francisco "Transient Occupancy Tax" from renters and pay it to the city.

Challenge: Linking Tourism and Local Produce

Istria: Gourmet Tourism Product Development

Istria County Tourist Board (www.istra.hr/en) (ICTB) is the official DMO for the Istria County in Croatia, tasked with supporting, maintaining, improving and promoting the destination's existing tourist assets and building and promoting a strong and recognisable brand for Istria. Gourmet Tourism Product Development is a product development initiative started in 1995 with the establishment of the first Wine Road of Istria (in the NW regions), which today has an estimated 150,000 visitors a year. ICTB leads the entire project in cooperation with winemakers (decides on the inclusion of new candidates in accordance with defined criteria, takes care of their education, categorisation, quality control, marketing and promotion through hosting media houses, appearing at thematic fairs, targeted presentations, organising specialised wine events, etc.). Since the creation of the Road, seven new wineries were created with 117 listed winemakers. Following the example of Wine Roads, Olive Oil Roads were created in 2002. Today, Istria has a total of eight roads, 137 listed olive growers and about 60,000 visitors a year. Within this product, ICTB successfully organises the Istria Gourmet Festival with the aim of educating main stakeholders of the development of Istrian gastronomy (restaurants, taverns, producers of autochthonous products, etc.).

Source: OECD

Challenge: Extending the Season

Dubrovnik: Off-Season Festival Development

In an effort to extend the tourism season, Dubrovnik Tourist Board (www.tzdubrovnik.hr/) (DTB) has focused on working with airlines, creating new content, and targeted marketing. This has included new content created for the off-peak season:

- In collaboration with the Dubrovnik Symphony Orchestra, the DTB designed six festivals that have become a traditional part of the annual calendar of events.

- The DTB also designed and created the Good Food Festival several years ago with the main goal of creating content for the season extension. Targeted at the very end of the summer flight schedule, it has opened up opportunities for new flights and accommodation.

Airline and airport cooperation:

The out-of-season projects require suitable content to assist in extending the season, but the tourist board is also engaged in negotiations with the airlines, initially with the national air carrier as part of strategic projects in cooperation with the Croatian National Tourist Board (HTZ), and after that also made contracts for direct marketing campaigns with British Airways, Turkish Airlines and Iberia, primarily to increase the visibility of Dubrovnik during the winter flight schedule, but also to ensure better occupancy of accommodation. For example, the DTB has partnered with the airport to cooperate with Vueling regarding marketing campaigns for flights from Barcelona and Rome over the winter months.

Source: OECD

ANNEX 6

USEFUL
DATA SOURCES

Annex 6: Useful Data Sources

<u>Development</u>

- Destinations International (2018) [Destination Organization Performance Reporting](#).

- European Cities Marketing (2018) [European Cities Marketing launches a Toolbox for Managing Tourism Growth in Europe](#)

- European Cities Marketing (2018) [What's next for DMOs?](#).

- European Parliament Think Thank (2018) [Research for TRAN Committee - Overtourism: impact and possible policy responses](#).

- INSETE & Region of South Aegean (2015) [Marketing Plan Tourist Product: South Aegean Region Road Map 2015-2020](#). (in Greek)

- McKinsey (2017) Coping with Success-Managing Overcrowding in Tourism Destinations.

- Panteion University & Regional Development Institute (2012) [Summary presentation of the strategic plan of the Region of South Aegean](#). (in Greek).

- South Aegean Region's Managing Authority (2017) [Implementation specialization of the Operational Program for the Region of South Aegean 2014-2020](#). (in Greek).

- UNWTO (2018) '[Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perceptions, Executive Summary](#).

- UNWTO (2019) ['Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions Volume 2: Case Studies | Executive Summary](#).

<u>Market Trends</u>

- INSETE (2017) Greek Tourism - Developments & Prospects, issue 3 Synopsis.

- INSETE (2018) <u>Balance of Travel Services by Region in 2017</u>.

- INSETE (2019a) <u>The Average Spend per Person for incoming tourists to Greece, 2005-2018; development and comparison with Spain</u>.

- INSETE (2019b) Benchmarking the Greece Brand Experience.

- INSETE (2019c) <u>The prospects of inbound tourism to Greece in 2019</u>.

- International Monetary Fund (2019) <u>World Economic Outlook</u>.

- Research Institute for Tourism and Hellenic Chamber of Hotels (2019) Hotel performance 2018.

- UNWTO (2019b) International Tourism Highlights 2018.

<u>Tourism Statistics and Insights</u>

- Bank of Greece (e.g. receipts by purpose of travel; receipts by country of origin; number of inbound travellers in Greece by country of origin; non-residents' overnight stays in Greece by country of origin

- National Institute for Employment and Human Resources (e.g. annual statistics) Hellenic Statistics Service (e.g. ferry traffic; visits to cultural sites; hotel arrivals, nights and occupancies per region/municipality) /

- Hellenic Chamber of Hotels (e.g. hotel supply in units, rooms and beds; studies by the Research Institute for Tourism)

- INSETE (e.g. domestic and international air arrivals at selected airports per month, Review Pro GRI Scores, numerous studies)

- FRAPORT (e.g. international arrivals per market / month)

- Hellenic Ports Association (e.g. cruise tourism traffic)

- Online information (e.g. listings, reviews, ratings) from review platforms (e.g. Trip Advisor) and online travel agents (e.g. Viator, Expedia, Get Your Guide)

<u>Legal/Political</u>

- Regional planning (Ministerial Decision 25290.2003 on the 'Approval of the Regional Framework for Spatial Planning and Sustainable Development of the Region of South Aegean')

- Thematic forms of tourism (e.g. Law 4582/2018 and Inter-ministerial Decisions: 1746/2015 & 13143/2018)

- Regulations on short-term rentals (mainly based on Law 4446/2016 and a series of subsequent decisions)

- PPP framework (e.g. Law 3389/2005 as amended by Law 3463/2006)

- Regional and Municipal administration (e.g. Law 3852/2010; Law 4555/2018).

further insights into destination management planning at

destinationmanagementplan.gr

European Bank
for Reconstruction and Development