

Destination Management Plan for Rhodes

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PART 1

EXECUTIVE SUMMARY

1. Executive Summary

1.1 Importance of this Destination Management Plan to Rhodes

This Destination Management Plan (DMP) outlines how Rhodes can ensure a strong tourism industry, contributing substantially to the sustainable economic, social, cultural and environmental future of the people of the island over the next 10 years to 2030. It is based on the fundamental principle that there should be a good and mutually beneficial balance between the interests of the people of Rhodes, the business community, the visitors and the environment. It recommends strategic priorities and actions required to achieve this.

To provide the basis for the recommended actions to achieve this balance, wide ranging research was undertaken, together with a programme of consultation with local and regional stakeholders, Rhodes residents, businesses and visitors, complemented by insights from elsewhere.

1.2 Current Situation and Challenges

Rhodes is one of the most successful Greek island destinations. Between 2012 and 2018, international air arrivals at Rhodes International Airport grew by 700,000 or 46% to 2.4 million and it remains Greece's third busiest airport. Rhodes has a total of about 500 hotel units with a combined capacity of nearly 100,000 beds. Between 2012 and 2018, the number of 5* hotels increased by 75% and the number of rooms in 5* hotels by 90%. There is no equivalent data for short terms rentals, but it is certain that numbers of properties available have increased hugely, due in large part to the growth of online agencies, particularly Airbnb.

Whilst tourism on Rhodes has seen considerable growth, it is based predominantly on sun, sea and sand, as a result of which tourism is highly seasonal. The months November to March continue to have virtually no direct international air arrivals. There is evidence (e.g. from surveys undertaken by local stakeholders, interview feedback) suggesting that the seasonality issue is exacerbated by the fact that average spending per visitor has reduced, making profitability more difficult to achieve.

The **major challenges** that Rhodes needs to address to ensure a sustainable tourism future are:

- To make Rhodes into a year-round destination - a major challenge, but one that could bring great rewards to Rhodes;
- To realise the potential of the exceptional resources in the central and southern parts of the island, where there is a wide range of resources for cultural and recreation activity and the communities are keen to host more tourism.
- To change the relatively homogenous image of Rhodes as a summer beach destination, which has hindered the development of tourism beyond the beach and in the interior, as well as in the off-season;
- To enhance the conservation and sustainability of Rhodes' exceptional built and natural environment and its cultural heritage;
- To take action on the wide range of factors that impact on quality of visitor experience, including quality of welcome, interpretation of cultural and natural heritage attractions; public transport services; number and quality of visitor attractions; cleanliness of public areas; congestion in Rhodes City at peak times and access to visitor experiences through online channels.

1.3 The Way Forward

Creating a sustainable tourism future will depend on addressing these challenges effectively through sustained commitment to the strategic aim *to optimise economic benefit to Rhodes through the development of tourism, in a way that is economically, socio-culturally and environmentally sustainable and valued by residents.*

In support of this aim, the Vision is that, *by 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.*

In pursuit of this Vision, a series of strategic priorities are proposed, as follows:

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 resident 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.

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.

The report identifies 'Action Areas' relating to each of the Six Strategic Priorities and the two supplementary priorities. More specific recommendations for action, with suggested lead responsibilities for implementation and performance measures are contained in Annex 1.

The report provides more detailed proposals for marketing and for development of new visitor experiences, including the creation of seven 'Signature Routes', to present a wide range of different experiences that will attract visitors to Rhodes all year round and to spread the benefits of tourism to communities across the island.

Insights on how other destinations have addressed challenges and opportunities similar to those of Rhodes are contained in Annex 4.

Successful implementation of the DMP will require an effective partnership structure, bringing key stakeholders together to take action on an integrated basis. The report sets out three options for establishing an effective implementation structure, within the framework of current legal constraints.

1.4 Critical Success Factors

Factors that are critical to realising the Vision and implementing the actions for each Strategic Priority for Rhodes include:

- Establishment of effective partnership mechanisms for 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 the Dodecanese Chamber, because collaborative effort will be essential;
- 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 Rhodes 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 this DMP.

In summary, this DMP is a roadmap to the future of tourism in Rhodes. It identifies six clear priorities for managing the destination of Rhodes and the development of its tourism over the next ten years; and it sets out an extensive plan of action to deliver these priorities. Its success will be totally dependent on the commitment and engagement of national, regional and local government and the establishment of effective mechanism for partnerships with the private sector and NGOs in steering, resourcing and implementing the DMP.

PART 2

INTRODUCTION

2. Introduction

The European Bank for Reconstruction and Development (EBRD) and the Ministry of Tourism take the view that implementing Destination Management is essential to promote sustainable tourism and 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 of businesses and residents. 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 and
- (iii) implement sustainable practices where "over-tourism" is becoming a concern.

Following discussions with the Ministry of Tourism, EBRD agreed to support development of the Destination Management concept in Greece by preparing Destination Management Plans for Rhodes and Santorini and, in parallel, a guide to preparation of such plans which can be used across Greece.

Following an open tendering process, three tourism consultancies, working in partnership, were appointed to undertake this work: TEAM Tourism Consulting and Yellow Railroad, based in the UK and Toposophy, based in Greece. Over the summer of 2019, the consultancy team undertook an extensive programme of research, consultation and strategy development, with the support of all key stakeholders on the island of Rhodes.

The process has been enabled through the facilitation support of the Dodecanes Chamber of Commerce, which managed all arrangements with regard to consultation and dissemination events, distributed press releases and dedicated posts through various communications channels to increase awareness of the project, ensured the engagement of key stakeholders throughout the program, and disseminated questionnaires to its members to enhance the response rate in local surveys.

PART 3

THE ROLE AND VALUE OF DESTINATION MANAGEMENT PLANNING

3. The Role and Value of Destination Management Planning

3.1 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 Organisation 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.

3.2 Destination Management Planning

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

¹ United Nations World Tourism Organisation (2015) [Sustainable Development of Tourism](#)

planning, development and marketing of a destination as well as how it is managed physically, financially, operationally and in other ways.”²

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 capacity of local industry stakeholders to sustain ambitious synergies.

Several different schemes have been tested over the last decade (e.g. committees of tourism promotion, special purpose entities, development companies under municipalities) among both top and less developed destinations in Greece. 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 actors of the private sector and gradually led to initiatives such as ‘This Is Athens & Partners’, involving the joined forces of The City of Athens, Aegean Airlines, Athens International Airport and the Greek Tourism Confederation (SETE). This is Athens & Partners is discussed further, as one potential model for Rhodes, in the analysis of governance and funding in Part 7.

3.3 The Approach to Destination Management Planning in this Report

The approach taken in this project has been to address **three key questions**:

- Where is Rhodes tourism now? – The Situation Analysis;
- Where does Rhodes want its tourism to be in 2030? – The Vision;
- How does Rhodes get there? – The Strategy & Action Plan.

And it 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;

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

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

3.4 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. For Destinations International (2017)³, these are key qualities to help destination organisations re-invent themselves and play effectively in the long-term the following roles:

- 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 too. A report by European Cities Marketing in 2017⁴, proposed that destination marketing organisations who wish to be part of the future 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;

³ Destinations International (2017) [A Strategic Road Map for the NEXT Generation of Global Destination Organisations](#).

⁴ European Cities Marketing (2018) [What's next for DMOs?](#).

- Provide alternative options for the allocation of public; funds derived mainly from bed taxes (Destinations International, 2018)⁵;
- Shape a more inclusive agenda for public-private partnerships such as Tourism Improvement Districts; an industry-led funding model in which tourism businesses commonly contribute to a fund and destination organisations have the jurisdiction to manage funding and implement a dedicated programme (University of Greenwich and Association of Town and City Management, 2016)⁶;
- 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 Marketing⁷ proposed ten tools that represent a range of approaches destination organisations 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 2019⁸, 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:

⁵ Destinations International (2018) [Destination Organisation Performance Reporting](#).

⁶ Economic Development Resource Centre, University of Greenwich (2016) [BIDs and the Visitor Economy](#)

⁷ European Cities Marketing (2018) [ECM launches a Toolbox for Managing Tourism Growth in Europe](#).

⁸ 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> a. Liaising with cruise companies b. Organisation of events in the shoulder season
3	Stimulate new visitor itineraries and attractions	<ul style="list-style-type: none"> a. Improve guided tours: extend schedules, energise them differently, offer self-guide tours, etc. b. Development of Interactive maps
4	Review and adapt regulation	<ul style="list-style-type: none"> a. Stricter rules for guided tours b. Urban zoning plans to balance economic activity
5	Focus on target segments	<ul style="list-style-type: none"> a. Segmentation by origin markets b. Customer segmentation according to dominant travel needs
6	Ensure local communities benefit from tourism	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> a. Regular meetings with all stakeholders b. Create website for tourism businesses. c. c. Campaigns to communicate benefits from tourism and progress on destination management issues
10	Communicate with and engage visitors	<ul style="list-style-type: none"> a. Awareness campaigns b. Informative visitor information centre
11	Set monitoring and response measures	<ul style="list-style-type: none"> a. Destination Scorecard that assembles data to establish a baseline set of measures, service performance and record experiences.

PART 4

WHERE IS RHODES' TOURISM NOW?

THE SITUATION ANALYSIS

4. Where is Rhodes' Tourism now? The Situation Analysis

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

An extensive PESTEL analysis is contained in the Situation Analysis Report. Key points with particular relevance for the Rhodes DMP are as follows:

Political

- A newly elected Mayor took charge in Rhodes in September 2019 based on the results of May's elections, while the national government also changed following the national elections that were held in July 2019. In Greece's political environment changes in leadership traditionally affect the pace of policy decision-making, and this a factor to keep in mind when dealing with a dynamic policy area such as destination management.
- Over the last decade Rhodes was among areas in Greece that managed to attract visitors avoiding competitor destinations such as Turkey and the Middle East that were facing geopolitical turmoil. However, times of political tension and challenge with regard to the management of flows of refugees and migrants could also have negative implications for a destination situated on the eastern edge of Greece, only 47 km from Turkey. Thus, it is important for Rhodes to be ready to deal with negative publicity about the wider area of South-East Aegean, if and when a critical situation occurred.
- Rhodes was one of the first destinations in Greece where a collaborative initiative emerged. PROTOUR was established in 1994 with an agenda mainly focused on destination marketing, but concerns such as the lack of a clear strategic approach and project implementation on an ad-hoc basis undermined the course of the initiative.
- Recent airport privatisation (FRAPORT) underlines both the need and opportunity for improvements in capacity and service quality at Rhodes International Airport⁹.
- The Greek Tourism Ministry's recently stated focus on developing health and wellness tourism¹⁰ will support creation of new experiences relating to the 'Reset and Recharge in Rhodes' signature initiative proposed in Section 6.7. This new Ministry focus is part of a wider policy agenda for the diversification of Greece's tourism sector through thematic and special interest tourism; an agenda

⁹ Fraport Greece (2019) [Fraport Greece's Development Plan for the New Era at the Greek Regional Airports](#).

¹⁰ Greek Travel Pages (2019) [Tapping into Health and Wellness Tourism Top Priority for Greece](#) (August 28).

reinforced by a bill (4582/2018) that the Greek Parliament passed late in 2018 (see also L-Legal in PESTEL).

- In 2019, the Hellenic Republic Assets made progress on its plans for two major properties in Rhodes. In May, they began preparatory work of a tender for the long-term concession of the Marina of Mandraki on Rhodes, which can cater to the needs of 175 boats, and is located outside the Old Town. Early in June, it was also completed the sale of a property in the area of North Afantou for the implementation of a major tourism project that will include a golf course.
- The Greek Tourism Ministry is going to define priorities for tourism related projects through EU funding during the 2021-2027 programming period. So far in the 2014-2020 programme period, 178 projects with a total budget of €36.5M have supported the accommodation sector, travel agencies, rent-a-car companies and activity providers in Rhodes. These projects involve two actions of the Operational Programme Competitiveness, Entrepreneurship and Innovation 2014-2020 (EPAnEK) (data kindly provided by the Ministry of Economy and Development – Special Secretary for ERDF and CF – Managing Authority of EPAnEK):
 - 100 projects with a total budget of €13.6M under the action 'Strengthening SME Tourism for modernising and improving the quality of their services'
 - 78 projects with a total budget of €22.9M under the action 'Supporting the Establishment and Operation of New SMEs in the tourism sector'
 - More information on other projects and initiatives undertaken by the Region of South Aegean and the Municipality of Rhodes are included in section 4.8 (Policy Context).

Economic

- As a major destination in one of the most tourism-dependent regions in Greece (South Aegean), Rhodes is well positioned to benefit from the current global growth in tourism, but must also recognise the challenges of managing future growth to ensure sustainability and real benefit to the people of Rhodes. It is also vulnerable to regional or global downturns, such as the current resurgence of Turkey and Egypt as international destinations. This represents a powerful argument for diversification of offers and markets.
- 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 2018¹¹. Of Greece's 9,917 hotels, 12 percent (1,193) held

¹¹Greek Travel Pages (2019) [Moody's Says Thomas Cook Collapse May Take Toll on Greek Banks](#) (July 27).

partnership deals with the Thomas Cook Group in 2019¹², 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 hotels¹³ had contracts with this company. Greece is expected to lose c.610,000 inbound airline seats¹⁴, 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 government¹⁵ by the end of 2019.

- In addition, ratings agency Moody's said the impact of the tour operator's collapse on tourism revenues and investments was bound to affect the country's credit prospect¹⁶.
- Among the islands of the Dodecanese, Rhodes has always been the tourism sector's powerhouse. In 2012, Rhodes had 59% of travel agencies in the Dodecanese, 64.5% of car rental operations and 84% of road transport tourist enterprises (Chamber of Commerce and Industry of the Dodecanese, 2016)¹⁷.
- Brexit-related uncertainty, the dynamic return of Turkey as a destination with highly competitive prices, and a relatively warm summer in Europe last year that affected the travel behaviour of holidaymakers this year, were key factors behind a -7% drop in pre-scheduled demand for air seats to Greece in 2019 summer (-4% in Rhodes's airport) (INSETI, 2019c)¹⁸. What remains to be seen is whether slowdown in Eurozone growth will occur as projected (International Monetary Fund, 2019)¹⁹, and in this case, how it will influence inbound tourism in Greece – along with other factors such as the collapse of Thomas Cook.

Social

- With the long-term trend for consumers to prefer experiences over possessions, tourists are increasingly seeking tailor-made experiences to address their interests or passions. The need for Rhodes tourism to adapt to this trend underlays the Visitor Experience Development Framework set out in Section 6.7. It provides the opportunity to attract higher-yield tourism all year round.

¹² Greek Travel Pages (2019) [OAED: Scheme to Secure Jobs for Greek Tourism Businesses after Thomas Cook Ruin](#) (October 3)

¹³ Greek Travel Pages (2019) [Impact of Thomas Cook Collapse on Crete – Governor](#) (September 24)

¹⁴ Greek Travel Pages (2019) [Thomas Cook Default Impacts 38 Countries, 8.6m Flight Seats](#) (October 2)

¹⁵ Greek Travel Pages (2019) [Greece's Thomas Cook Repatriation Operation in Full Swing](#) (October 1)

¹⁶ Greek Travel Pages (2019) [Moody's Says Thomas Cook Collapse May Take Toll on Greek Banks](#) (July 27).

¹⁷ Chamber of Commerce and Industry of the Dodecanese (2016) Business Profile of the Dodecanese An Analysis of the Economy of the Prefecture of the Dodecanese.

¹⁸ INSETI (2019c) [The prospects of inbound tourism to Greece in 2019](#).

¹⁹ International Monetary Fund (2019) [World Economic Outlook](#).

- Related to the previous point, with almost a third of the global population projected to be over 50 by 2025, there is a major opportunity for Rhodes (where 50+ travellers are a key market segment) to attract active seniors who wish to take better care of their health, appearance and wellbeing. Those who travel internationally have significant discretionary income to spend and are flexible regarding the timing of their trips – potentially preferring the autumn and spring to the heat of the summer.
- The significant growth of short-term rentals in Greece has major implications for rising housing costs and loss of community cohesion.

Technological

- Technological developments (such as AI, big data, i-beacons) offer new methods for Rhodes to manage visitor flows and spread traffic in the peak season more effectively than at present. Potential applications include the ability to monitor flows of people and vehicles more effectively in real-time and introduce management measures where required; ticket sales management and dynamic pricing; 'pushing' information to interested users, when they most want it; sophisticated itinerary planning; researching the most receptive audiences and accessing them in the most cost-effective ways
- Similarly, the rapid expansion of social media offers cost-effective opportunities for Rhodes to spread its key marketing and public information messages through visitor engagement, user-generated content and third-party endorsement.
- Technological developments in cruise ship design, propulsion (e.g. liquefied natural gas- LNG), waste management, emissions control, and wastewater treatment should enable Rhodes to reduce slightly the environmental impact of visiting cruise ships.
- Online travel agents and top hotels are seeking increasingly to sell activities, experiences and events to their customers, in advance of their trips and in-destination, potentially expanding the market for suppliers. The implications are that Rhodes needs to expand and enhance its offer of activities, experiences and events and ensure that suppliers are well equipped and skilled to sell their offers online. This need is addressed in the Visitor Experience Development Framework set out in Section 6.7.
- Ongoing competition between Airbnb-style platforms and online travel agents (e.g. Booking.com) in the market of short-term rentals is reshaping both tourism supply and demand in major destinations such as Rhodes.

Environmental

- Increasing consumer awareness of the contribution of tourism to global carbon dioxide (CO₂) emissions, together with the actions of governments and international institutions to reduce those emissions, will impact increasingly on travel decisions in the future, in terms of how, when and where people travel and

the activities they undertake. There is a variety of other concerns about the environment generally and the environmental impact of tourism (e.g. waste management generally; water pollution from plastic waste and cruise ship emissions) which may also affect consumer choice of destinations.

- An example of impact of environment on consumer travel choice and behaviour is "Flygskam" or "flight-shaming", 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 survey²⁰, 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.
- These factors provide both a need and an opportunity for Rhodes to establish a strong competitive position, within Greece at least, through appropriate action, in the first instance to understand and measure environmental impact; and then to plan and implement a programme of action to become a model for responsible tourism and a zero-carbon destination. This has implications for many aspects of governmental actions and regulations; and also on adoption of good practices by tourism businesses.

Legal

- Legal limitations, such as those being considered and currently applied in several world cities and by Athens, may need to be adopted by Rhodes to address the impact of expanding short-term property rentals, such as Airbnb, which risks distorting the local housing market and restricting the ability to attract socially essential workers (e.g. teachers, doctors et al).
- In December 2018, the Greek Parliament passed a new bill (4582/2018) which sets the standards for the development of cultural, religious, health and wellness, agro, food and wine, sports, city and educational tourism. It is a matter of further examination if special facilities in Rhodes have been incorporated in the accreditation systems for wine tourism²¹ and agro-tourism²², and if the most recent bill will encourage something similar for additional businesses (e.g. accreditation for businesses specialised in sports tourism).
- Current laws in Greece limit the options in respect of the formation of essential public-private partnerships to develop, manage and market tourism, along the lines suggested in this report. Whilst mechanisms can be found around this problem, as has happened in Athens, continuing attention must be given to enabling more direct partnership options.

²⁰ BBC (2019) [Flight shame' could halve growth in air traffic](#) (October 2)

²¹ Law: 4276/2014 & Inter-ministerial Decisions: 1746/2015 & 13143/2018.

²² Inter-ministerial Decisions: 543/34450/2017 & 15258/2018.

4.2 Greek Market Context

International arrivals in Greece almost doubled from 2012 (15.5m) to 2018 (30.1m excluding cruise passengers). This performance has already exceeded McKinsey's (2017)²³ earlier forecasts for inbound visitor arrivals in Greece by 2020. It also puts Greece in the 13th position of UNWTO's global ranking in 2018²⁴.

The direct contribution of tourism varies significantly among regions. The total (direct and indirect) impact 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%)²⁵

Tourism is a major driver of employment in the Region of South Aegean. Hotels and other accommodation establishments in the Region of South Aegean involved the highest number of employees – though seasonal many of them – over a 7-year period (2011-2017). For 2016-2017, restaurants and catering services was the economic sector with the second highest number of employees (Labour Market Diagnosis System, 2018)²⁶.

However, high seasonality and the shrinking share of domestic tourism have overshadowed positive performance. Only 20% of hotels across Greece had a monthly occupancy higher than 80% in May 2018, while 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)²⁷.

Greek destinations need to address the challenge of heavy pressures in certain places at certain times. There are 13 Regions in Greece, but almost 85% of tourism activity is concentrated only in five Regions. In two of these Regions (South Aegean, Attica) there are three destinations (Santorini, Rhodes, Athens) that are thought to face time- and place-specific challenges due to indicator results concerning bed-nights density

²³ McKinsey (2017) [Coping With Success -Managing Overcrowding in Tourism Destinations](#).

²⁴ UNWTO (2019b) [International Tourism Highlights 2018](#).

²⁵ INSETE (2017) [Greek Tourism – Developments & Prospects, issue 3 Synopsis](#).

²⁶ National Institute for Employment and Human Resources (2018) [Annual report \(in Greek\)](#).

²⁷ Research Institute for Tourism and Hellenic Chamber of Hotels (2019) [Hotel performance 2018](#).

(number/km²), bed-nights intensity (number/citizen), and air-transport intensity (pax per bed-night)²⁸.

The growing number of arrivals from Eastern European countries and the trend of a shorter duration of stay (from 9.1 days in 2012 to 7.5 days in 2018) have resulted in reduced average spending per international traveller (from €646 in 2012 to €520 in 2018). However, the resilient performance of traditional markets has contributed to a steady average daily spending (from €71.1 in 2012 to €69 in 2018). For SETE Intelligence (2019)²⁹, key priorities for increasing average spending in the long-term are:

- A strategic planning approach to destination management;
- Tourism product diversification;
- Infrastructure improvements that will have a positive effect both on visitor experiences and the residents' quality of life.

Greece's tourism product has five key assets (hospitality of locals, quality of accommodation, feeling of security, local food and landscape beauty) which outperform the tourism product of competitor destinations in southern Europe. However, according to a post-visit survey of travellers who visited Greece during the 2015-2017 (SETE Intelligence, 2019)³⁰. Greece lags behind its competitors in visitor experience elements (e.g. cultural experience, shopping experience, evening and night activities) and destination management issues (e.g. cleanliness, airport access, road infrastructure, visitor information). These do not apply equally throughout Greece; and those that are critical to Rhodes are addressed below in this DMP.

4.3 A Review of Rhodes' Tourism Industry

A detailed analysis of Rhodes' tourism industry is contained in the project Situation Analysis Report. This section provides a summary of the information contained in that report.

Products, Experiences, Infrastructure

Overall accommodation capacity estimates for Rhodes are as follows:

²⁸ European Parliament Think Thank (2018) [Research for TRAN Committee - Overtourism: impact.](#)

²⁹ INSETI (2019a) [The Average Spend per Person for incoming tourists to Greece, 2005-2018; development and comparison with Spain.](#)

³⁰ INSETI (2019b) [Benchmarking the Greece Brand Experience.](#)

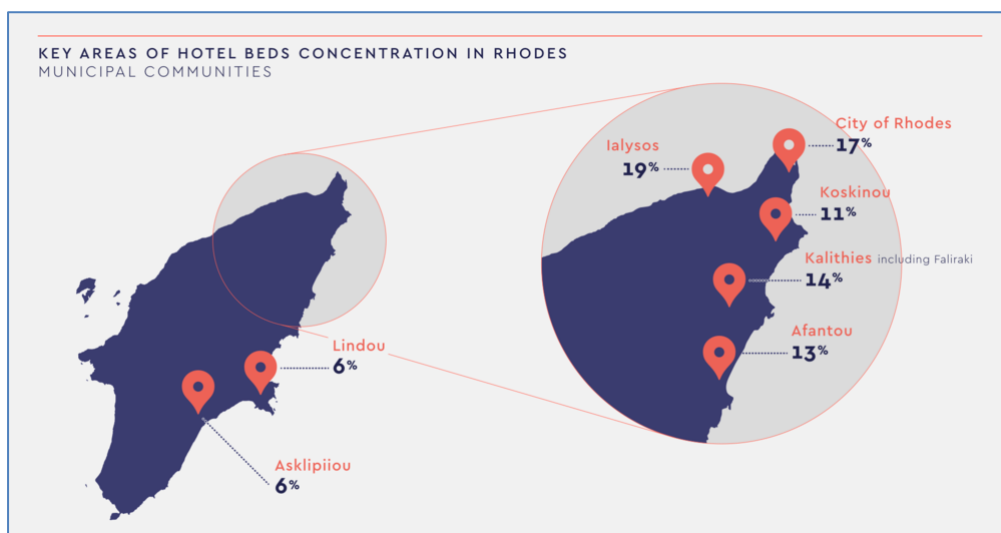
Hotel beds in 2019 (all)	99,100
5* Hotel beds	33,068 (33.5%)
4 * Hotel beds	38,016 (38%)
3* Hotel beds	15,388 (15.5%)
2 * Hotel beds	10,864 (11%)
1 * Hotel beds	1,764 (2%)
Furnished rooms and apartments	13,122
Tourist villas	3,009
Short term rentals (2700 units x 4.5 pax)	12,150

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

Hotels (based on data from the Hellenic Chamber of Hotels): Rhodes has a total of about 500 hotel units with a combined capacity of nearly 100,000 beds. Just over one third of the hotels are 4 and 5 stars, but together they have more than 70% of the hotel beds. Overall, the average number of rooms/beds per hotel is 98/196, but in 5* hotels it is 270/557; and in 4* hotels, it is 163/327.

1* + 2* hotels have only 34/66 rooms/beds on average. Between 2012 and 2018, the number of 5* hotels increased by 75% and the number of rooms in 5* hotels by 90%. In the same period, the number of 3* rooms decreased by 7%, although the number of 3* hotels was similar. The geographical distribution of hotel capacity (beds) among the municipal communities of Rhodes is as follows (based again on data from the Hellenic Chamber of Hotels):

4.3.1. Key Areas of Hotels Beds Concentration in Rhodes



4* and 5* star hotel beds have dominant shares in the areas of Asklipiiou (99%), Koskinou (93%), Afantou (83%), Ialysos (82%), and Kalithies (71%) but slip behind hotel beds of lower categories in the city of Rhodes (48%) and Lindos (40%)

Short terms rentals: there are about 2,700 listings, 64% only on Airbnb, 20% only on HomeAway and 16% on both platforms. Entire homes/apartments account nearly for 85-88% of total listings; private rooms for the rest (based on data from Inside Airbnb and Airdna for May 2019).

Restaurants: There are more than one thousand listed restaurants, of which two thirds offer mid-range dining options (based on Trip Advisor listings)

Outdoor activities: Boat Tours are the category with the highest number of listed offerings, while lower volumes are identified for several other types including scuba & snorkelling, water sports, surfing, windsurfing & kitesurfing, 4wd, waterskiing & jetskiing, nature & wildlife tours, speed boats tours, fishing charters & tours, other outdoor activities, adrenaline & extreme tours, and bike tours (based on Trip Advisor listings).

Attractions: The main culture and nature-based attractions reviewed by TripAdvisor (according to evidence collected in May 2019) are shown in the following table:

Attraction	No. of Trip Advisor Reviews	Attraction	No. of Trip Advisor Reviews
Acropolis of Lindos	8,127	The Acropolis of Rhodes	720
Palace of the Grand Master	5,600	Church of the Panagia	430
Medieval City	4,733	Filerimos Monastery	360
Archaeological Museum	2,214	Rhodes Jewish Museum	229
Valley of the Butterflies	2142	Hydrobiological Station	165
Epta Piges/Seven Sources	1322	Parc Rodini	163
Ancient Kameiros	946	Municipal Art Gallery	98
Monolithos Castle	855	Decorative Arts Museum	28

Conference and Meetings Facilities on Rhodes

A project audit of main conference and meeting venues on the island of Rhodes³¹ identified the following:

- Thirty main venues offering conference and meeting facilities on the island.
- The venues are virtually all large high-end hotels or resorts – either 4 or 5* (but mostly 5*) with an average room number of 373. The hotels/resorts provide

³¹ This involved online desk research of aggregator sites (e.g. Meetingpackage.com and Hellenic Sun Editions), listing the main congress / conference enterprises in Greece, complemented by venue data deriving from Google searches ('conferences and meetings Rhodes').

facilities ranging from a few meeting rooms to dedicated halls and suite of meeting/conferences rooms.

- Over half of the venues offer large or very large conference capacity – 40% have large capacity (catering for between 250-999 people) while 13% have very large capacity (for 1,000 or above).
- The two largest venues are 5* resort hotels which double up as Convention Centres. Both have a suite of conference rooms (19-23) and a maximum capacity of their largest hall of 3,400 people or over. Combined, *Rodos Palace Luxury Convention Resort* (max capacity 3,500) and *Akti Imperial Hotel & Colosseum Convention Center* (max capacity 3,400), account for over half (57%) of the estimated overall MICE capacity of the island.
- There are around 120 meetings rooms, which corresponds to an estimated overall capacity for the islands of 41,417. **This represents a major resource for the development of tourism in the spring, autumn and winter.**
- Grand Master's Medieval Castle is a potential venue, occasionally holding exhibitions and major cultural events.

Summary Findings of Audit

Capacity	Number of venues	Percentage
Small <100 people	3	10
Medium <250 people	7	23
Large 250-999 people	12	40
XL 1000 people or more	4	13
Unknown	4	13
Total	30	100

Venue type	Number of venues	Percentage
4*	9	30
5*	20	67
Other	1	3
Total	30	100

A table listing all venues with basic data is in the Situation Analysis Report.

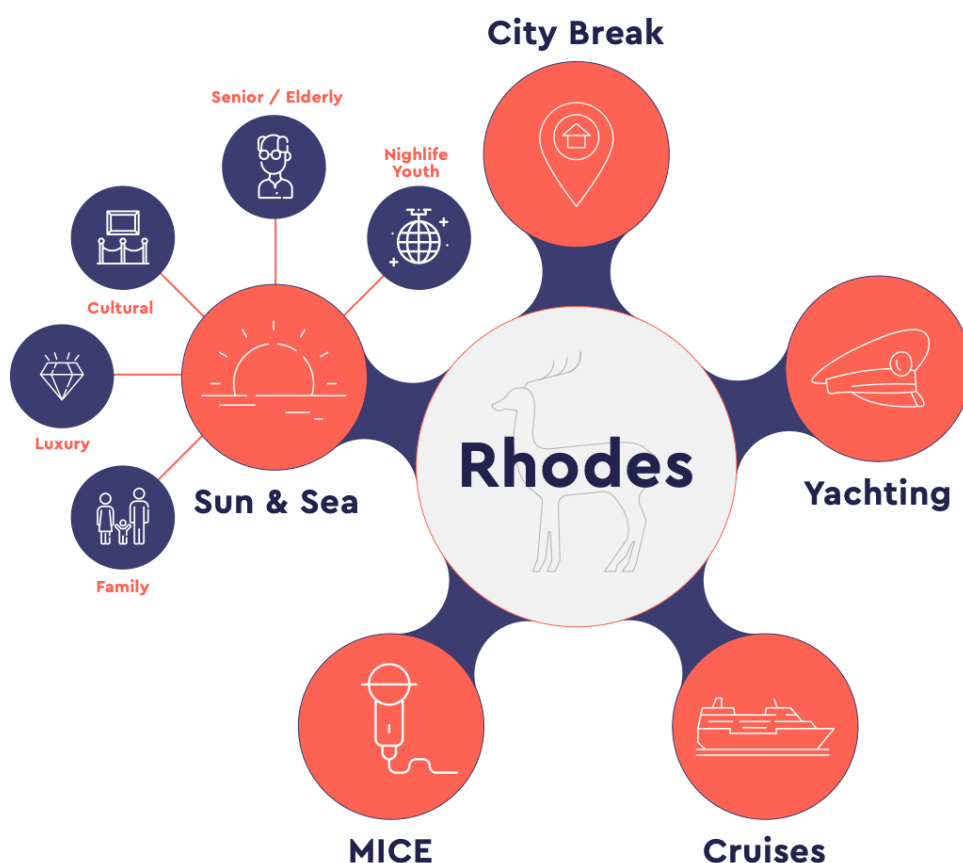
The South Aegean Region's Tourism Product Marketing Plan Roadmap 2015-2020³² identified the importance of sun/sea holidays and city breaks and also the crucial role of

³² INSETTE & Region of South Aegean (2015) [Marketing Plan Tourist Product: South Aegean Region Road Map 2015-2020](#).

(in Greek).

maritime tourism including a variety of supplementary experiences and activities. Rhodes' MICE sector was also identified a key product with significant potential for growth. Additional products identified for Rhodes were luxury, culture and nightlife and holidays for families and seniors. The diagram below summarises the report's analysis.

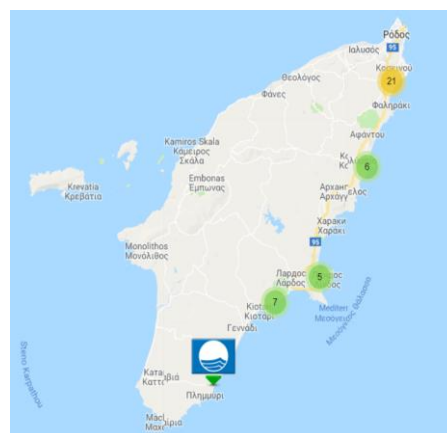
4.3.2. Key Products & Special Products under the Dominant Product of Sun and Sea



Beaches: Forty of Rhodes beaches have Blue Flag status, all on the east coast, as shown on the map.

Events: Key Rhodes events with international appeal are:

- [Roads to Rhodes Marathon](#) (April/May);
- [Medieval Rose Festival](#) (May-June);
- [Summer Festival](#) (July-August);
- [Rhodes & South Aegean Jazz Festival](#) (August).
- [The 'Olympic Triathlon'](#) (October)



Current Investment Plans

2018 saw the 30th anniversary since the inscription of the Medieval City of Rhodes into the UNESCO World Heritage site list. To mark this, a memorandum of cooperation between the national government, the regional government of the South Aegean and the municipality of Rhodes set out the terms for the protection and conservation of the Medieval City. It includes conditions for the funding of projects aimed at the promotion of the medieval city. A ten-year programme of projects is anticipated following the advent of the new municipal administration in September 2019.

During 2019, fourteen properties currently not in use in the Medieval City will be leased through public tenders by the Archaeological Proceeds Fund (TAP) – the first phase of the project for the exploitation of the Medieval city's empty properties leasing homes for a 12-year period and shops for a six-year period with an additional six-year extension.

Preparatory work was begun in May 2019 for a tender for the long-term concession of the Marina of Mandraki on Rhodes, which can cater to the needs of 175 boats, and is located outside the Old Town. Also relating to the renovation of the city of Rhodes East Waterfront, an EU-supported project, with funds from the Region, was launched to boost entrepreneurship and provide residents and visitors with access to contemporary infrastructure.

Other plans for public sector investment and infrastructure improvements that will benefit the tourism sector in Rhodes include:

1. Cultural events digital platform and mobile cultural guide for Rhodes – €100K.
2. Promotion of the Acropolis Monuments of Lindos through digital content and virtual and augmented reality services – €150K.
3. Protection and promotion of the ancient Acropolis of Rhodes – €1.6M.
4. Protection and promotion of Rodini park – €264K.
5. Creation of non-permanent access facilities for people with disabilities at the beaches of the Municipality of Rhodes – €163K. [This project is funded by the Central Government's resources].
6. Integrated Multi-Channel Passenger Information System for Public Transportation in Rhodes - €159K. [This project is funded through INTERREG].
7. Enhancement and landscaping of the Archaeological Site of Phileremos on Rhodes – €1.1M.
8. Actions for the protection and conservation of the ecosystem of the Butterflies Valley – €606K.

9. Construction of sanitary landfill of South Rhodes – €5.5M.
10. Supply and establishment of Security Management System of Rhodes' Port Facilities – €3.4M.
11. Reconstruction and traffic regulations from the port of Akantia to New Marina of Rhodes – €3M.
12. External water network of Ialysos of Municipality of Rhodes – €1.6M.
13. Water supply network of Rhodos Town of Municipality of Rhodes – €1.5M.
14. Water Supply of Kolymbia village, Rhodes island – €393K.
15. External water supply network of South Rhodes – €256K.
16. Integrated Urban Development Actions of the Municipality of Rhodes – €3.2M.

Two major private sector projects, involving investment of more than €500m are set to go ahead in the Afantou area – see Section 6.8.

A potentially huge project, requiring investment on a scale far beyond any other tourism related project in Rhodes or Greece is the proposition to recreate the legendary Colossus figure, of giant proportions, straddling the entrance to Rhodes harbour. Undoubtedly this would draw huge attention to Rhodes, increasing awareness globally. The concept would require exhaustive financial appraisal and an immense fund-raising campaign. Additionally, the impact on tourism would need to be fully assessed – in particular, its ability to help create an all-year-round season and reduce peak pressures in the city of Rhodes. An alternative concept of a sophisticated Colossus Museum and Research Centre, designed to create a focus for international peace and harmony, has been suggested and a roadmap proposed. This may prove be more realistic to progress in the short to medium term.

Quality Levels and Issues

The quality of visitor products and experiences is critical to visitor satisfaction, which in turn can influence visitors' decision whether or not to come back to Rhodes in the future; and the way in which visitors talk about Rhodes to friends, relations and other social media users.

In terms of quality of **accommodation**, Rhodes scores well:

- More than 70% of Rhodes' hotel room capacity is in 4* (38%) and 5* star (32.5%) units;
- Rhodes saw a 75% increase in 5-star hotels between 2012-2018.

The scale, proportion and growth rate of 4* and 5* accommodation is very high by comparison with many other destinations. This may be regarded as a considerable strength, in the context of the strategic priority to move Rhodes towards higher yield markets. However, there may also be a risk, in terms of the ability to achieve the necessary room rates necessary to ensure a good RoI, particularly if the hotels are substantially dependent of high-volume tour operator business based on sun-sea-sand. The collapse of Thomas Cook has demonstrated the extent of this risk and strengthened the case for diversification of offer and markets.

As explained in Section 4.4 below, Rhodes has a relatively limited number of substantial top-rated **visitor attractions**, whilst some of the larger attractions have relatively poor ratings. This is a significant consideration in respect of plans to broaden the market appeal of Rhodes. However, there are more than 200 smaller attractions, many with good ratings, and there is potential to increase usage in many cases.

One of the criticisms that emerged in the consultations and survey research is that **interpretation at visitor attractions**, particularly major cultural and historic sites, could be improved considerably, through more creative and informative treatment, using modern techniques to bring the past to life.

For a destination with the accommodation capacity of Rhodes, the number of **events** with strong visitor appeal is limited – just the four listed above. In future efforts to extend the season to the winter months, there is both a need and an opportunity to create new events during these months that will be attractive to residents and visitors alike.

Skills

There is no readily available source of data regarding skills deficits, nor was the subject articulated significantly during the project research and consultation with Rhodes businesses and local stakeholders. This does not mean there are no areas in which an improvement in tourism-related skills is required. It may simply reflect a predominance of small, largely family-owned businesses, focused on service delivery during a relatively short season.

Rhodes has the privilege to host a series of important institutions involved in tourism education and the implementation of training and life-long learning programs.

- Two institutions under the Ministry of Tourism; the Advanced School of Tourism Education and the Institute of Vocational Training, with programmes on areas such as hotel management and food and beverage management;

- A unit under the University of Aegean; the Department of Mediterranean Studies with programmes on archaeology, linguistics of the South-eastern Mediterranean Area and international relations and organisations;
- The Municipality of Rhodes and the Association of the Development and Progress of the Dodecanese organise series of seminars on topics such as foreign language skills for tourism professionals, hygiene of foods, etc.

An assessment of these programmes would be necessary with regard to the volume of graduates and certified employers that they add to the workforce of Rhodes. The same applies with regard to opportunities for adding new training programmes according to the recommendations of the action plan.

Given a strategic focus on quality and value of tourism, rather than volume, it will be important to see how hotels, restaurants and other businesses can improve their offerings and how their workforce can develop advanced skills (e.g. in customer service, online marketing, provision of thorough information to visitors about Rhodes). A shift from price- to experience-driven sales in the main season would require tourism businesses to develop skills and networking, so as to attract visitors through an advanced mix of travel trade and online channels – the role of technology is crucial here.

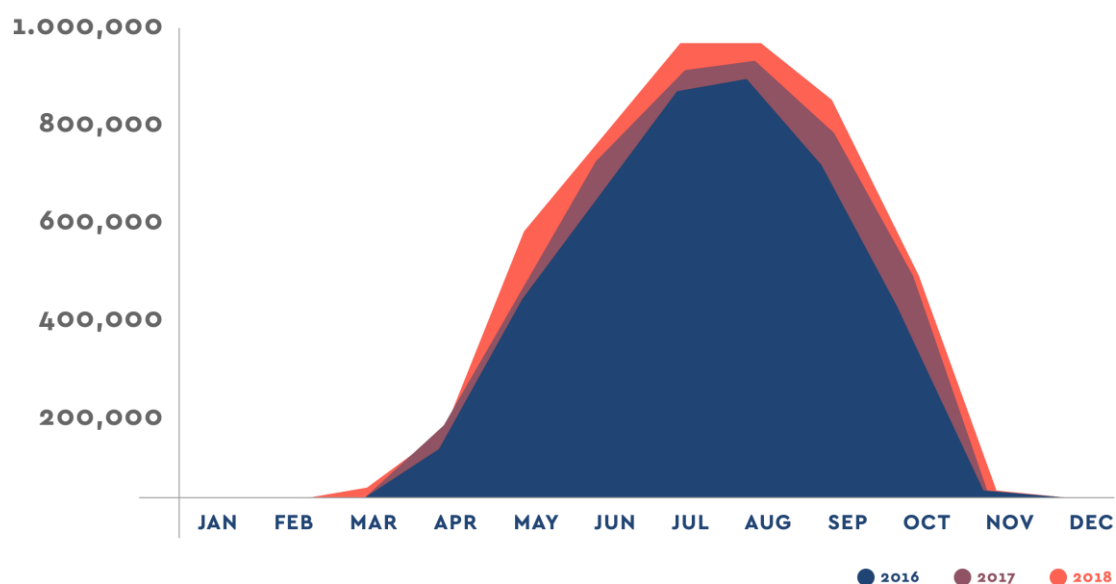
4.4 Destination Performance Assessment

International Air Arrivals

Between 2012 and 2018, international air arrivals at Diagoras Airport in Rhodes grew by 700,000 or 46% to 2.4 million. Although airports on other islands, notably Santorini and Mykonos, have seen an even higher rate of growth, Rhodes has maintained its position as Greece's third busiest airport, after Athens and Heraklion (based on data from INSETE and Fraport Hellas).

Seasonality is a long-term challenge for Rhodes, as it is for other islands. The monthly figures of international air arrivals over the past three years are shown in the following diagram. They show that numbers of arrivals in May and June grew disproportionately, but **the months November to March continue to have virtually no direct international air arrivals**. This represents a major challenge to the commercial sustainability of the tourism industry; but also a major opportunity, as identified later in this report.

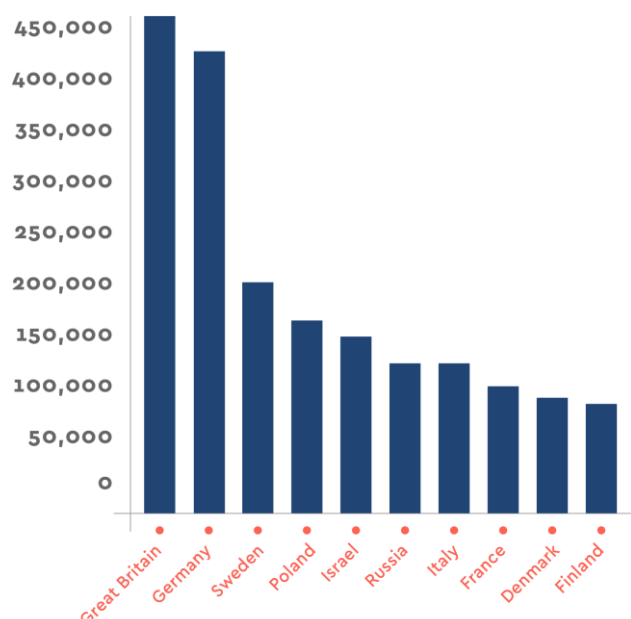
4.4.1. International Air Arrivals (Monthly) at Rhodes Airport (2016-2018)



As regards the countries of origin:

- **Great Britain and Germany** together accounted for 37% of international arrivals in 2018
- The third market in 2018 was **Sweden** (7.3%) but the **Nordic markets** as a whole (also including Denmark, Finland and Norway) had a share in 2018 of nearly 19%
- Other key markets were **Poland** (6%), **Israel** (6%), **Russia** (5%) and **Italy** (4.7%)
- Among top markets, **Russia** (-11.8%) and **Italy** (-8.7%) saw a decline in 2018 (c.f. 2017).

4.4.2. Top 10 International Markets at Rhodes Airport in 2018

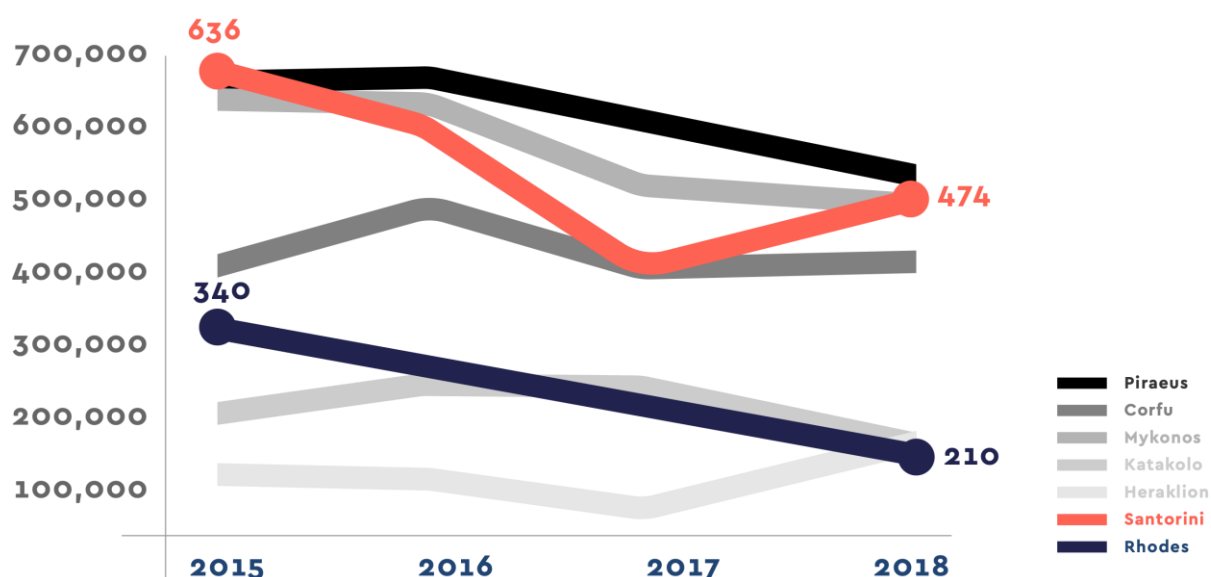


Cruise Ships and Passengers

Over the years 2015-18, Rhodes saw a steady decline in both the number of cruise ship visits (-38%) and cruise passengers (-30%) coming to Rhodes (based on data from the Hellenic Ports Association).

The ranking of cruise tourism destinations across the Mediterranean by Med Cruise, shows Rhodes occupying the 28th position in terms of cruise passenger arrivals. Most importantly, the decline of cruise tourism traffic in Rhodes over the 4-year period is similar to the pattern identified in a series of ports in Turkey, Cyprus and Egypt³³. Thus, the recent decline in Rhodes could be also attributed to a restructuring of cruise ship itineraries across the wider area of Eastern Mediterranean.

4.4.3. Traffic of Cruise Ships among Top Destinations in Greece (2015-2018)



Hotel Usage

In 2017, 1.75m international visitors were checked in to hotels, for a total of 11.42m overnights, representing an increase of more than one third over 2012. Average length of stay remained at about 6.5 nights. International visitors accounted for 96.5% of all hotel overnights. The growth trend continued in 2018, with 1.84m international visitors checking in to hotels, for a total of 11.83m overnights (average length of stay = 6.4 nights; share of hotel overnights by international visitors = 96.8%).

³³ MEDCRUISE (2019) [Cruise Activities in MedCruise Ports: Statistics 2018](#).

In 2017, 111,000 **domestic visitors** were checked in to hotels, for a total of 417,000 overnights, representing an increase of 4% over 2012. Average length of stay remained at about 3.8 nights. Domestic visitors accounted for just 3.5% of all hotel overnights. The numbers of domestic tourism further decreased in 2018, with 109,000 Greeks checking in for a total of 385,000 overnights (average length of stay: 3.5 nights; share of hotel overnights by international visitors: 3.2%)

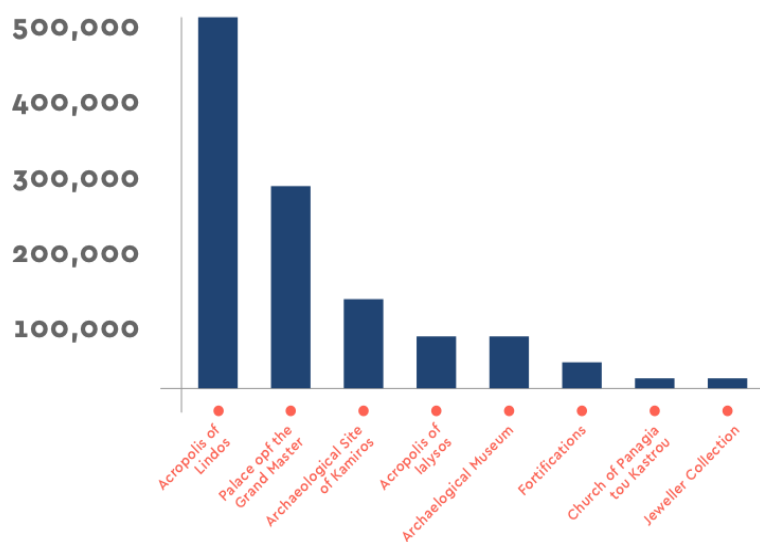
Hotel occupancy for the months of opening increased from 60% in 2012 to 68% in 2017 and settled down at 67% in 2018 (based on data from the Hellenic Statistics Service).

Archaeological Sites and Museums

Visitor numbers

The Acropolis of Lindos, the Palace of the Grand Master of the Knights of Rhodes and the Archaeological Site of Kamiros are by far the most visited attractions. However, all three sites in 2018 had fewer visitors than in 2014 and 2015, in contrast to the steady growth of international arrivals. All other attractions had fewer than 100 thousand admissions in 2018 (based on data from the Hellenic Statistics Service).

4.4.4. Admissions at Archaeological Sites and Museums in Rhodes, 2018



TripAdvisor review ratings

There are eight attractions rated 5* in more than 50% of TripAdvisor reviews; four of these also have the largest numbers of reviews:

- Acropolis of Lindos;
- Palace of the Grand Master of the Knights;

- Medieval City;
- Archaeological Museum of Rhodes.

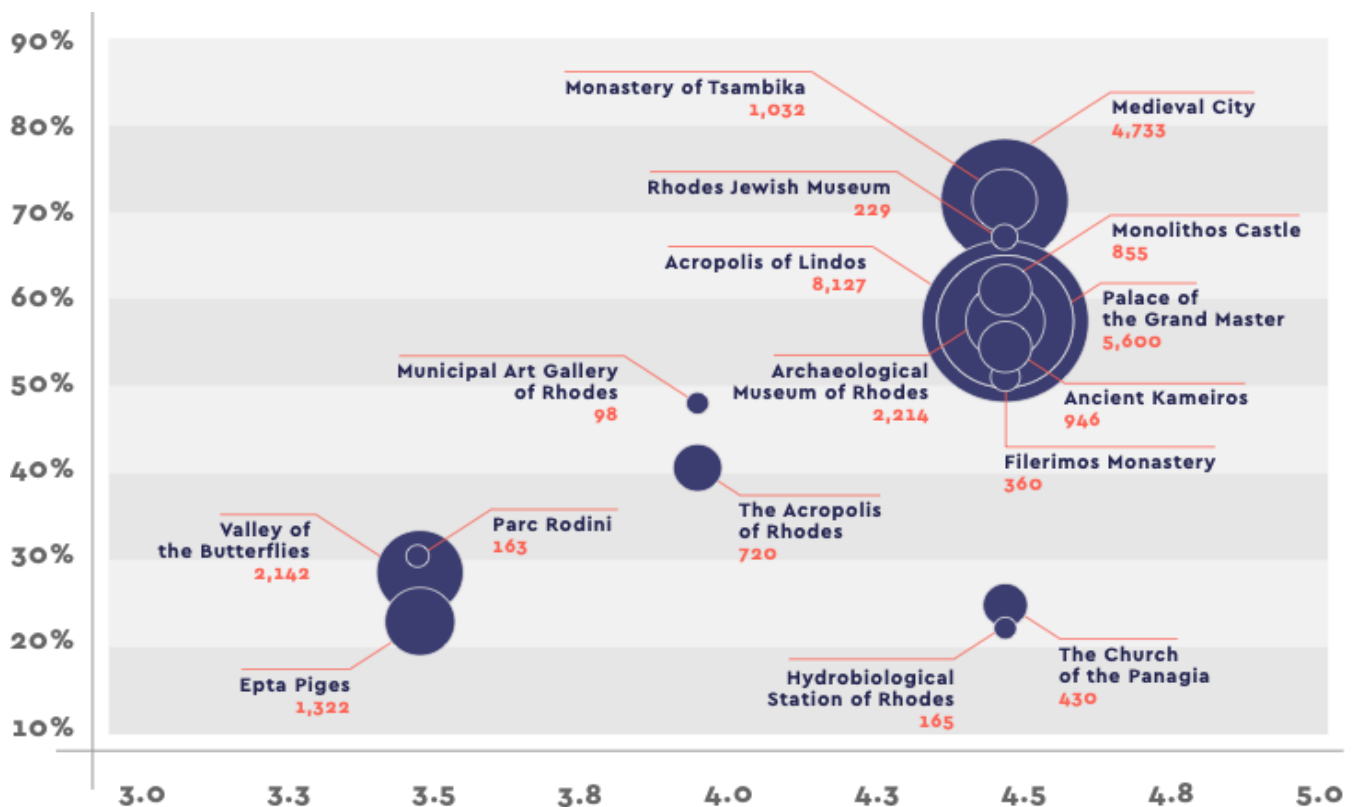
Only the Medieval City is rated 5* by more than 70% of reviews.

Two sites of natural attraction (Valley of the Butterflies and Epta Piges) have 1,000+ reviews and relatively few 5* ratings.

The following graph shows an elaboration of Trip Advisor data, as follows:

- The bubble size is proportional to the number of reviews for selected cultural and natural attractions;
- The position of the attraction on the X axis is based on the average rating per attraction;
- The position of the attraction on the Y Axis is based on the average percentage of 5* reviews;
- Each label inside the graph includes the name of the site and the number of reviews.

4.4.5 Analysis of Trip Advisor Rating & Reviews



4.5 Market Analysis

Rhodes received a total of 3.3 million arrivals in 2018 (based on data from the Hellenic Ports Association, Hellenic Statistics Service and INSETE). These include all types of arrivals – i.e. visitors and residents, tourists and business travellers. They were split relatively evenly between arrival by air and sea as follows. Significantly, the largest number of international visitors would appear to arrive on international flights.

- By air: 2,749,000, split as follows:

International arrivals: 2,338,000; Domestic arrivals: 411,000.

- By sea: 558,000, split as follows:

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

Online surveys of recent visitors to Rhodes revealed that:

- The lower holiday budgets of Britons compared to those of Germans; the Britons also value Rhodes as an affordable destination more than the Germans;
- The notable shares of Britons and Germans who have respectively tested Rhodes as a family and solo travel destination;
- The high shares of Britons and Germans who booked their trip to Rhodes directly with tour operator/travel agent (in person / online – Airbnb was a popular booking channel for German holidaymakers in Rhodes);
- The strong appeal of Rhodes to German travellers as a top bucket list option;
- The higher interest of German travellers in destination websites/social media as sources of information during holiday planning;
- The high appraisal of both Britons and Germans for the quality of accommodation facilities, the quality of food and drink and the status of Rhodes as a value for money destination.

Other sources (e.g. complaints received by the National Tourism Organisation, annual visitor survey conducted by the Rhodes Hotel Managers Association, newspaper articles) suggest a low visitor satisfaction rate with infrastructure and services including the airport, local transportation and the lack of adequate parking facilities nearby key sites such as the Medieval City of Rhodes and the Archaeological Site of Lindos. Additional concerns exist on:

- The level of cleanliness in public areas;

- The lack of control on tourism businesses (e.g. restaurants) which offer low quality and/or overpriced products and services;
- The overall organisation and the quality of key facilities in popular sites;
- The lack of up-to-date information that visitors can receive about events taking place all over the island.

4.6 Key Issues Emerging from Research and Consultation

The local surveys and consultation with businesses, the community and other stakeholders in Rhodes, identified the following issues that need to be addressed within the Destination Management Plan.

Image and Business Development Issues and Opportunities

- **Dependence on tour operators:** This restricts opportunities for new product development in the main season, creates an over-reliance on price, rather than experience-driven sales and leaves Rhodes vulnerable to exchange rate fluctuations and external economic shocks. This places Rhodes hotels in a weak bargaining position. It also makes it harder to develop off-season business, as Rhodes is beholden to tour operators' seasonal schedules (e.g. May-Oct).
- **Business diversification:** Need to develop new products/experiences to diversify market base, attract new higher-spending markets (e.g. for cultural and recreational activities) in main season and in off-season.
- **All-inclusive accommodation:** Primarily a requirement of the tour operators, this has the side-effect of restricting time and money spent in local community, particularly in the evenings. The solution is to increase the proportion of the market that does want to explore the island and its communities; and engage in the wide range of activities that are available, in the ways proposed later in this report. This can be done in partnership with hotels, giving them the opportunity to sell their guests more experiential tours and activities, opportunities for interaction with local communities.
- **Hotel development:** There were suggestions for a moratorium on new hotel building and a focus on upgrading quality of existing hotels.
- **Commoditisation:** Beach/sun/sea product has become commoditised – makes it harder to endow Rhodes with a distinctive brand image and to change potential visitor perceptions or expand awareness of Rhodes' other appeals, e.g. as a cultural/natural/active destination.
- **Risk of a negative reputation,** if there is no control of quality, overcharging and scams.

Extending the Season: Opportunities, Attitudes and Challenges

- Off-season development of products and experiences:

Currently offered/requiring **minimal investment to develop**:

- New products/experiences to attract off-season business, for example: hiking, cycling, city breaks, classes-self-improvement/special interest (e.g. yoga, cookery, art, languages, other hobbies/special interest)
- Conferences and incentive travel
- Hiking trail development and signage
- Cycle routes and signage.

Requiring significant new investment to develop:

- Major new events – The Region is potentially willing to invest in large events that will attract new visitors – the marathon showing what can be achieved.
- Golf – new course(s).

- The **large majority (93%) of local businesses are interested** in extending their period of opening, if there was sufficient business to justify it.
- Gastronomy tourism, cultural tourism, outdoor activities, and conferences and conventions are the forms of tourism/types of experiences considered to offer the **greatest growth potential outside the main season** for the island, in terms of value.
- Off-season development requires **concerted effort** of hotels, airlines, restaurants, shops, etc, working to a common plan. [N.B. 140 hotels stayed open during the winter of 2016/17 as part of a programme to increase off season business.]
- There is a **risk of lack of willingness to innovate** in building off-season packages, which could frustrate the realisation of the considerable potential for off-peak market growth.
- Lack of **direct air services** from best prospect markets (e.g. northern Europe) outside main season is a challenge of extending the season – but there are still six Aegean services per day from Athens, enabling quick connections, potentially enabling significant off-peak market development.
- Statistical data on weather patterns indicates that Rhodes (in relation to European comparators) has one of the most (if not the most) equable climates in Europe – one that is highly attractive to those who live in the north of Europe. Of particular note:
 - Summer in Rhodes are warm and clear, with virtually no chance of rain;

- Rhodes has the longest warm weather season;
- A composite analysis of weather statistics (favouring clear, rainless days with temperatures between 65°F and 80°F). indicates that Rhodes offers overall the most favourable weather for tourism activities throughout the year.

Tourism Impact Attitudes

- Six in ten members of local communities believe that the positive impacts of tourism outweigh the negative impacts; and nearly eight in ten of them would also like to be more involved in decisions about destination management in Rhodes.
- Among local businesses there is a balance of views over the growth of short-term rentals and their impact on local communities. Among members of local communities, there are more negative views (38%) than neutral (30%) and positive views.
- Among local businesses insufficient car parking, traffic congestion, water efficiency issues, lack of cleanliness and waste management issues and crowd congestion in specific places / time periods are the most important challenges in Rhodes in relation to tourism development. Among members of local communities there are notable shares of respondents who are also particularly concerned about uncontrolled sprawl and energy efficiency issues.
- Among both local businesses and members of local communities, there is a strong consensus on the positive impact of tourism in areas such as jobs for local people, income for local shops and SMEs, and demand for local food and crafts. However, 43% of both groups believe that tourism has had negative impact on the environment – for example, on biodiversity, coastal areas, water pollution etc.
- Among both local businesses and members of local communities there is strong consensus on top priorities in destination management planning: i.e. Improve infrastructure, improve the seasonal distribution of visitors throughout the year, improve preservation of cultural heritage, improve preservation of natural heritage, improve the provision of information to tourists.

Environmental issues

- **Congestion:** in Rhodes Town in peak season, especially August.
- **Pollution:** including roadside litter.
- **Public realm:** limited interpretation, few iconic monuments/statues/public art, which reflect local 'sense of place'.
- **Environmental management:** Little, if any, recycling culture or conservation behaviour (e.g. plastic bottles/containers, encouragement of single-use plastic et al).

Infrastructure and Operations Issues and Attitudes

- **Arrival and welcome:** airport arrival chaotic and poor queue management, at peak times in summer 2019
- **Departure:** insufficient seating capacity and limited food outlets for peak traffic volumes at airport.
- **Parking:** park and ride/shuttle bus required in/around Rhodes Town to ease congestion
- **Roads:** need for some road improvements, particularly in the interior of the island, with a primary focus on the 'Signature Routes' (see Section 6.7).
- **Utilities:** water, energy capacity (and waste management?).
- **Unlicensed beach operators:** Tacky, ramshackle appearance of beach bars and restaurants in some areas.
- **Law enforcement:** Laws are either not enforced or differentially enforced (e.g. unlicensed beach bars and restaurants, hotel development) – whether through lack of resources or political/social favouritism, or both, is unclear.
- Among **local businesses**, insufficient car parking, traffic congestion, water efficiency issues, lack of cleanliness and waste management issues and crowd congestion in specific places / time periods are the most important challenges in Rhodes in relation to tourism development.
- Among members of **local communities**, there are notable shares of respondents who are also particularly concerned about uncontrolled sprawl of new building and energy efficiency issues.

Visitor Experience Issues and Opportunities

- **Interpretation:** poor interpretation at key sites/attractions and non-existent interpretation at historic sites in Rhodes old town.
 - Untold stories – Stories need to be unearthed and told well – by guides, websites and local interpretation (e.g. Old town evolution, Colossus, Cicero, Caesar, Hellenic, Roman, Venetian and Italian periods and extant influence et al).
 - Revival of natural and cultural heritage attractions: integrate smart interpretation techniques into scheduled and future improvement projects.
- **Local produce:** limited range of local produce as souvenirs (esp. at airport shop – e.g. compare with Cretan products, which dominate Greek produce inventory).

- **Opportunity for local businesses and communities** to acquire new knowledge and develop advanced skills (e.g. in customer service, online marketing, provision of in-depth accurate information to visitors) to improve Rhodes' offer.

Development Challenges, Concerns and Priorities

- **Challenges:** Local businesses consider the most important challenges to be: traffic congestion, uncontrolled sprawl, crowd congestion in specific places / time periods, waste management issues, insufficient car parking, and lack of cleanliness.
- **Concerns:** Members of local communities expressed concerns about the increase in housing prices and living costs and increasing landscape erosion.
- **Dissatisfaction with tourism development in Rhodes:** 74% of local businesses are not satisfied with the way tourism is developing in Rhodes. The respective share of members of local communities who are not satisfied with the way tourism is developing in Rhodes is 73%.
- **Future priorities:** Among both local businesses and members of local communities there is a reasonable consensus on specific priorities in destination management planning – i.e.:
 - improve infrastructure;
 - improve preservation of cultural and natural heritage;
 - improve heritage interpretation;
 - establish restrictions for new tourism accommodation establishments and for short-term rentals;
 - improve the provision of information to tourists;
 - increase/enhance training and lifelong learning programmes at local level;
 - establish a mechanism to measure and monitor tourism.

4.7 Brand Image and Market Appeal

Rhodes has established its sizeable tourism business largely on its appeal as a summer beach destination. Its rich history, exemplified in the architecture of Rhodes' Medieval Town, adds an appealing dimension to the sun, sand and sea for which most visitors come. The prevalence of all-inclusive accommodation packages and, for some markets, a vibrant nightlife, have enabled Rhodes to appeal to a broad demographic, from couples of all ages and families to younger groups of friends seeking a party lifestyle. Colossus associations may also have contributed to Rhodes' fame, albeit more as a historic icon than in the expectation of seeing any extant remains.

The survey of previous visitors undertaken for this DMP indicated that Britons appreciated the value for money offered by Rhodes, while for Germans it featured highly, perhaps as a more aspirational destination, on their 'bucket list' of destinations. Regarding outdoor activities, appeals mentioned by both Germans and Britons included a paradise of sun & sea, natural beauties, history & culture, sightseeing opportunities and sense of place (e.g. modern vibe, friendly people). Germans also identified water sports as an attraction.

Also known for many years as a cruise destination, Rhodes has seen a consistent decline in the number of cruise ships and in cruise passengers between 2015-2018. While other cruise destinations in the Mediterranean have also experienced mixed fortunes, this consistent decline might indicate a decline in awareness of Rhodes and/or it could suggest its competitive appeal is waning in relation to other destinations.

The relatively monolithic image of Rhodes as a summer beach destination has so far masked its other appeals and thereby hindered the development of tourism beyond the beach and in the interior, as well as in the off-season. Rhodes has not established a strong distinctive brand beyond its sun, sand and sea appeals. However, there are significant opportunities for growth in Rhodes' tourism, if it can develop new experiences and products to appeal to other market segments in both the main and off-seasons and focus its brand narrative on markets that will be open to exploring a different side of Rhodes.

4.8 Policy Context

National Policy

The Regional Framework for Spatial Planning and Sustainable Development in South Aegean (RFSPSDSA)³⁴ was created in 2003 but has not been updated since then, in contrast to a series of frameworks for other Regions in Greece (e.g. Region of Thessaly).

An evaluation report in 2015³⁵ identified a series of discrepancies (e.g. guidelines for the development of alternative forms of tourism, assessment of types and intensity of accommodation establishments) between the Regional Framework and the Special Framework for Spatial Planning and Sustainable Development of Tourism in Greece,

³⁴ Ministerial Decision 25290.2003 on the ['Approval of the Regional Framework for Spatial Planning and Sustainable Development of the Region of South Aegean'](#), Government Gazette 1487B. (in Greek)

³⁵ Ministry of Environment, Energy and Climate Change (2015) [Assessment, revision and specialisation of Regional Framework for Spatial Planning and Sustainable Development of the Region of South Aegean](#). (in Greek).

created in 2009. The Special Framework of Tourism in Greece, due to be revised in 2020, is the next opportunity for top destinations such as Rhodes and Santorini to help establish a contemporary agenda of local issues and themes to be integrated into national planning – and then inform the preparation of a revised RFSPSDSA (not updated since 2003).

Policy of the Region of South Aegean

In 2012, the main study³⁶ underlying the Region's strategy identified cases of islands (without specific references) where tourism had already exceeded the carrying capacity of the physical environment and available infrastructure.

The South Aegean Operational Programme 2014-2020 was approved in December 2014 with a budget of €168.2 million. 50% of the budget derives from EU funds (€62.2 million from the European Regional Development Fund and €21.9 million from the European Social Fund). The rest of the budget derives from national participation. The development of 'Experiential Tourism' is a key pillar defined in the programme.

As part of the Region's Smart Specialisation Strategy (2015) there were four priorities for the development of 'Experiential Tourism' within a budget of €15.3 million (state and EU contribution)

1. Diversify the Tourism Product through quality improvement and experience enrichment (€7.8 million):
 - Promotion of the Region's competitive advantages;
 - Development of experiential products;
 - Development of quality programs/signs at the local level;
 - Development of small-scale installations and initiatives for the development of alternative forms of tourism.
2. Expand the value chain of the tourism sector through upstream and downstream interrelationships (€2.6 million):
 - Development of innovative entrepreneurship in experiential tourism;
 - Development of collaborative action models across the sector's value chain.
3. Use information and communication technologies (ICTs) (€2.05 million):

³⁶ Panteion University & Regional Development Institute (2012) [Summary presentation of the strategic plan of the Region of South Aegean](#). (in Greek)

- Creation of tools and applications for experience diversification and enrichment;
- Use of information and communication technologies for enhancing productivity and service quality in experiential tourism.

4. Develop new skills and knowledge (€2.9 million):

- Development of training programmes and e-learning services.

As part of the same 'Smart Specialisation' initiative, funds were allocated also for the protection of natural environment and the use of green technologies (€6 million total budget for agriculture, processing and tourism). In 2019, there was a further revision of priorities and actions for the development of 'Experiential Tourism'³⁷ with emphasis on the overall use of ICT in the tourism sector certain areas (e.g. enhancement of cultural tourism experience, development of websites and apps for tablets and smartphones for service providers, better connectivity with international booking systems).

In 2019, South Aegean is the European Region of Gastronomy³⁸ and the Regional Authority has set five objectives as basis for evaluation.

1. Upgrade the Region of South Aegean to a gastronomic tourism destination.
2. Increase the number of labelled and certified key local products.
3. Create local products from local produce to be used throughout the tourism chain
4. Manage a better cooperation across the food chain, from the producer to the end consumer.
5. Motivate people to recognise the opportunities in remaining and returning to their homeland.

Relating to this, the [Aegean Cuisine](#) initiative was launched through the coordinated activities of the South Aegean Center for Business and Technology Development (KETA) in cooperation with the Cyclades and Dodecanese chambers of commerce. It continues to plan and develop actions and activities to benefit member-businesses and which provide quality services to those visiting the southern Aegean. Its website includes information about certified local products (partner restaurants (46 in Rhodes), partner producers of local products (5 in Rhodes), partner visitor attractions (1 in Rhodes) and local recipes (3 in Rhodes)

³⁷ South Aegean Region's Managing Authority (2017) [Implementation specialisation of the Operational Programme for the Region of South Aegean 2014-2020](#). (in Greek)

³⁸ Region of South Aegean (2019) [European Region of Gastronomy 2019](#).

In 2014-2015, the Region of South Aegean partnered with SETE Intelligence (INSETE) on South Aegean's Tourism Product Marketing Plan Roadmap 2015-2020³⁹.

Policy of Rhodes Municipality

There are many municipal functions that play a key role in managing destinations – functions that influence the operation of the tourism sector, the experience of visitors and the quality of life for residents, for example:

- Preparation and implementation of tourism promotion programmes;
- Cleanliness of public areas;
- Implementation of research and technology programmes for local economic development;
- Management of local markets and sport facilities;
- Organisation of sport and cultural events;
- Promotion of cultural heritage and cultural tourism;
- Provision of public transportation services;
- Protection of museums, monuments and archaeological sites within the area of jurisdiction;
- Traffic regulations, pedestrian zones, information signs to places of interest, orientation signs etc.;
- Waste management.

Besides these general functions, the municipal authority of Rhodes is involved in a series of influential, tourism-related activities.

The Directorate of Tourism consists of three offices (alternative forms of tourism; promotion, marketing and information; strategic planning). The 2018 Promotion Plan had a €390,000 budget allocated among actions about extending the tourist season, developing alternative forms of tourism, marketing/development, promotion & advertising, public relations, communication, publicity & promotion, networking, internet marketing conferences and events, targeting special travel groups, web portal-tourist guide, e-newsletter, photo/video content, exhibitions/fairs, convention bureau,

³⁹ INSETE & Region of South Aegean (2015) [Marketing Plan Tourist Product: South Aegean Region Road Map 2015-2020](#). (in Greek).

gastronomy tourism event, information offices, training activities, printed promotional material, best practice awards, international conference of Rhodes's expatriates, World Tourism Day events and 'Open Doors' / European Heritage Days events.

In addition, there have been a number of specific municipal tourism projects, including:

- [Cultural Capital of Europe 2021](#): Rhodes was among Greece's final candidates but lost the bid to Eleusis;
- [Renovation of the city of Rhodes East Waterfront](#): Approval in September 2018 of project with EU funds from the Region with emphasis on boosting entrepreneurship and providing residents and visitors with access to contemporary infrastructure;
- [Medieval Town Technical Studies and Works](#): Subject to final approval within 2019 of a 10-year co-funded project by several stakeholders including 2 ministries and the Region based on EU funds;
- Improvements in natural heritage attractions: The Municipality has been working with the Region on two projects with a budget of €560k and €496 (EU funds) for the redevelopment of [Rodini park](#) nearby the city of Rhodes and of the [Valley of Butterflies](#).

4.9 Competitor Analysis

Undertaking a competitor analysis is a critical step in identifying what makes Rhodes stand out from its competitors. Identifying its distinguishing characteristics is important to help Rhodes position itself competitively against those destinations that are trying to attract the same type of visitors, who appreciate what these destinations have to offer. On one level, every destination is competing with Rhodes for visitors, but those that offer the closest appeals – on both a physical and emotional level – are the ones against which Rhodes should measure itself and establish how it can differentiate itself from these other destinations to make it stand out.

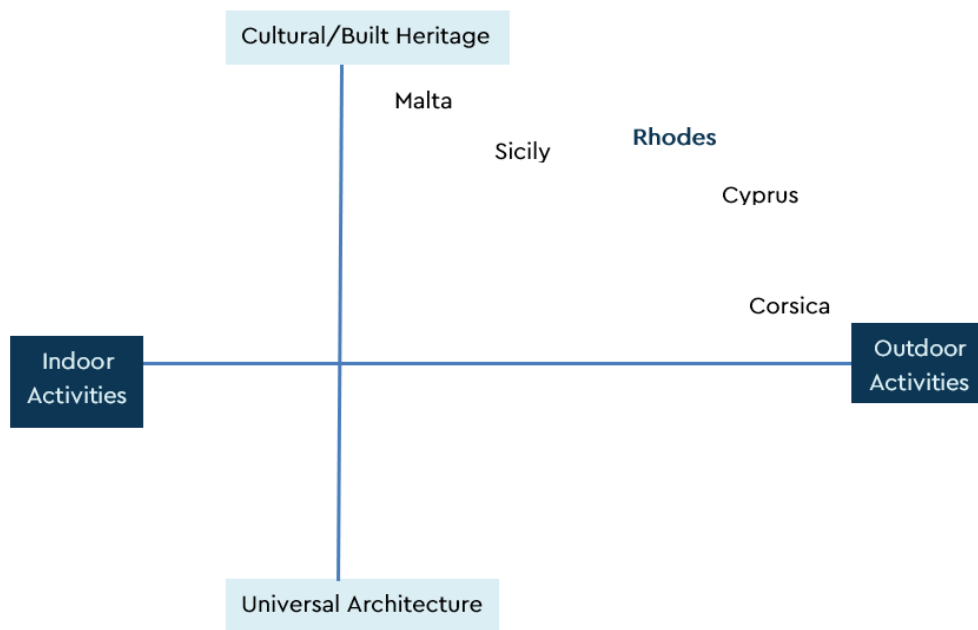
Rhodes is shown on the graphs below in relation to its main competitors for the type of visitors who will contribute most towards the sustainable development of its tourism. There are two dimensions to these competitive analyses:

- **Physical:** the strongest destination assets;
- **Emotional:** the emotional appeals.

The characteristics at the top and right of each axis represent those in which Rhodes excels. These represent the island's strongest visitor appeals. Those on the other end of

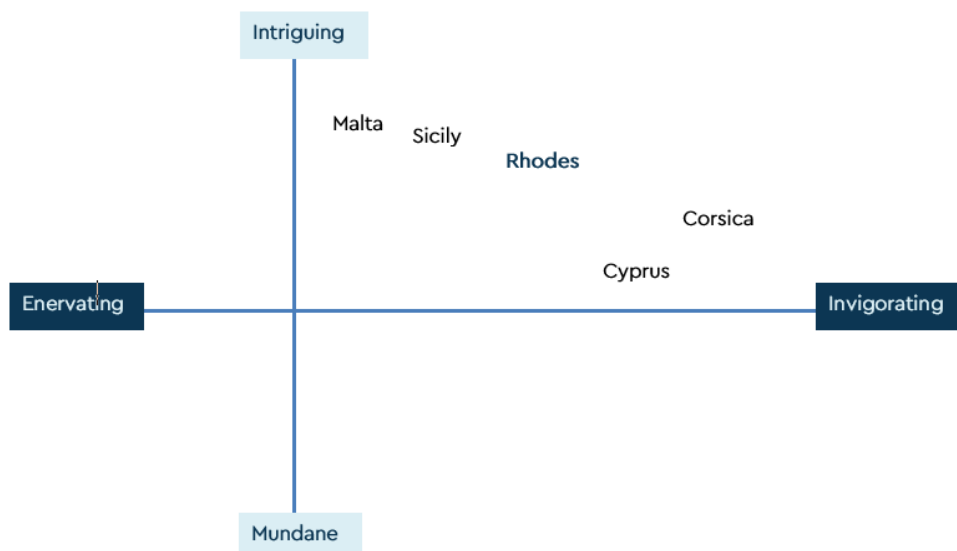
each axis represent the antithesis of these strengths. This does not mean Rhodes does not possess other appeals; it does. But, in order to identify Rhodes's strongest competitive position, it needs to lead with its strongest assets and assess objectively how strong they are in relation to its main competitors.

Rhodes- Physical



Conclusion: Rhodes' most competitive **physical** assets are its cultural and built heritage and outdoor activities.

Rhodes- Emotional



Conclusion: On an **emotional** level, Rhodes conveys a sense of intrigue and invigoration, which represent its most competitively emotive associations.

4.10 SWOT Analysis

Strengths	Weaknesses
<p>Destination:</p> <ul style="list-style-type: none"> • Strong international brand and top performer of tourism in Greece • Rhodes Old Town, as a world class heritage resource, with substantial capacity for tourism • Rich diversity of cultural and natural resources • Distinctive, attractive landscape and scenery • One of best climates in Europe for outdoor activities all year round • Excellent restaurants and good wines, fully engaged in the South Aegean Cuisine initiative • Resort facilities ideal for family holidays • Large number of Blue Flag beaches (40) • Increased and improved capacity of hotels and other accommodation establishments, including short-term rentals • Substantial facilities for conferences and conventions. <p>DMP Implementation:</p> <ul style="list-style-type: none"> • Major stakeholders involved, from public and private sectors • Substantial support for and investment in tourism by regional and municipal authorities • Strong support for DMP and its implementation from Dodecanese Chamber • Strengthening national support for and investment in tourism by Ministry of Tourism. 	<p>Destination:</p> <ul style="list-style-type: none"> • Seasonality – seven-month season only • Congestion in Rhodes City at peak periods, primarily in August • Limited interpretation of cultural and natural heritage attractions • Quality of services at airport and seaport • Overdependence on two markets • All-inclusive hotel packages reducing visitor spending in other businesses • Limited online offering of in-destination experiences through, dedicated platforms • Few highly rated popular attractions • Issues regarding water, energy and waste infrastructure • Limited off-season air connectivity • Identity dominated by sun, sea and sand • Shortcomings in service and connectivity of public transportation • Insufficient waste and energy management • Lack of cleanliness in public areas • Some inappropriate behaviour by tourists. <p>DMP Implementation:</p> <ul style="list-style-type: none"> • Limited access to in-depth data on key issues (e.g. tourism performance, market segments/profiles, visitor satisfaction, tourism impacts) • Lack of updated principles and guidelines for tourism planning • Insufficient focus on and funding for destination management • Insufficient visitor management (e.g. parking facilities nearby key attractions, pedestrian signage, road signage)

	<ul style="list-style-type: none"> • Lack of professional skills (e.g. online marketing, knowledge of local products/traditions) • Limited destination intelligence (e.g. in-depth on market segments, impacts of tourism development, etc.) • Limited experience of partnership working • Limited industry and community engagement in destination management.
Opportunities	Threats
<p>Destination</p> <ul style="list-style-type: none"> • Potential for expansion of outdoor activities: hiking, cycling, scuba diving and more. • Conducive environment for wellness and self-improvement (e.g. painting, learning) activities and classes • Creation of tour opportunities to take visitors from Rhodes to surrounding countryside and nearby islands • Enthusiasm of communities to host and entertain visitors through new visitor experiences and events – including Monolithos, with its excellent cultural and recreational resources • Potential to attract higher yield markets through diversification of the offer and targeted marketing • Use of digital technologies to expand and enhance interpretation and presentation of cultural, historic and natural attractions • Creative visitor management solutions to manage pressures, to enhance the visitor experience and the residents' quality of life. • Substantially increased penetration into the national and international MICE 	<p>Destination</p> <ul style="list-style-type: none"> • Local tensions in the Aegean and potential instability in major world markets • Forecasts for slower growth in the economies of key target markets • Economic impact of exchange rate fluctuations (e.g. post-Brexit) • Heavy demand at peak times impacting on visitor satisfaction and/or residents' tolerance and/or quality of the environment • Lack of differentiation from other sun and sea destinations • Reduced competitiveness through underinvestment by public and private sectors • Community cohesion: risk of short-term visitor accommodation rental distorting the local housing market, by dominating available supply and reducing access to affordable housing for residents and seasonal workers. <p>DMP Implementation:</p> <ul style="list-style-type: none"> • Failure of stakeholders to collaborate on implementing the DMP • Insufficient governmental support to enable effective DMP implementation • Failure to raise sufficient resources to implement DMP priorities.

markets through convention bureau activity

- Measures to encourage water and power conservation and waste recycling
- The Colossus legend and the potential to recreate it.

DMP Implementation:

- Establishment of a Destination Management Partnership that brings together all key stakeholders to work together on DMP implementation
- Creation of an online business network to provide information and deliver business services and advice, relating to DMP implementation.

Insights on how other destinations have addressed challenges and opportunities similar to those of Rhodes are contained in Annex 4.

4.11 Challenges

A number of strategic challenges have emerged from the research and consultations outlined in previous sections and sub-sections, as set out below.

To Make Rhodes into a Year-round Destination

Because of its dependence on sun, sea, sand tour operator markets, Rhodes has a well-established pattern of a seven-month season for the majority of tourism businesses. However, Rhodes has one of the most equable climates in Europe (as noted in Section 4.4) and the potential for a wide range of cultural, recreational and environmental activities throughout the year. Air connectivity is limited during the 'off-season' but is nevertheless accessible through Athens on Aegean services that run six times a day. The aim should be to increase international air services on an incremental basis, as demand grows. Creating a 10-12 month season is a major long-term challenge, that will require a concerted effort by the partnership of stakeholders, but one that could bring great rewards.

To Extend Tourism's Benefits Across the Island and Realise the Full Potential

Tourism is concentrated in the north of the island but, across the island, there are exceptional resources for cultural and recreation activity and communities keen to host more tourism. It is a challenge to realise this potential and a major opportunity to realise the island's full potential – and at the same time, play a major role in extending the season and reducing peak pressures on Rhodes City.

To Change the Relatively Homogenous Image of the Island

The relatively monolithic image of Rhodes as a summer beach destination has hindered the development of tourism beyond the beach and in the interior, as well as in the off-season; and reinforced the pattern of relatively low yield business, predominantly through tour operators, with a high level of dependency on Europe's main markets of Germany and UK. The need and opportunity is for a substantial repositioning of Rhodes' brand as a destination.

To Enhance the Conservation and Sustainability of Rhodes' Exceptional Built and Natural Environment and its Cultural Heritage

There are many issues relating to conservation and sustainability of Rhodes' exceptional built and natural environment and its cultural heritage. These include uncontrolled sprawl of new buildings, water pollution, poor water, waste and energy management, oversupply of hotels, short term rentals affecting housing costs and availability and reducing community cohesion, congestion in Rhodes City at peak times, erosion of coastal areas, reduction in biodiversity and poor management and deterioration of some cultural heritage sites.

To Take Action on the Wide Range of Factors that Impact on Quality of Visitor Experience

Just as there are many challenges to sustainability in Rhodes, so too there are to the quality of visitor experience. These include poor quality of welcome and services at the airport and the seaport; limited interpretation of cultural and natural heritage attractions; shortcomings in service and connectivity of public transportation; few highly rated popular attractions; lack of cleanliness in public areas; congestion for cars and people in Rhodes City at peak times and limited online offering of in-destination experiences. Addressing these challenges in a forceful way, as part of the repositioning of Rhodes' image, could have major benefits for Rhodes' tourism.

PART 5

WHERE DOES RHODES' WANT ITS TOURISM TO BE IN 2030?

AIM AND VISION

5. Where does Rhodes Want its Tourism to be in 2030? Aim and Vision

5.1 Strategic Aim and Vision

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.

This means focusing on tourism that:

- Creates a profitable tourism industry, offering long-term, year-round jobs;
- Contributes to the maintenance of the social fabric of Rhodes' society and community wellbeing and is supportive of residents' preferred way of life;
- Contributes to the conservation of Rhodes' natural environment and to its built and cultural heritage;
- Takes measures to minimise negative impacts on any of the important elements of the Rhodes economy, society, cultural heritage and natural or built environment.

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.

This Vision for Rhodes represents a major diversification for the island, requiring local communities and businesses across Rhodes to play an active part, by creating exceptional new experiences to attract and satisfy the target markets, not only in the off-season, but all-year round – in effect, diversified offers for diversified target markets. This transformation of Rhodes into an all-year-round destination will require all tourism stakeholders to adopt a new mindset, acquire new skills and knowledge and implement 'smart' methods for working together as part of the island's tourism ecosystem.

An integral aspect of the transformation will be the adoption of a range of methods to ensure sustainability, including initiatives to manage visitor numbers and flows within the limits of the carrying capacity of the island as a whole and of the specific places and times when there is the danger of overcrowding and negative impact on both quality of life for residents and the quality of experience for visitors.

5.2 Strategic Focus

Based on the evidence gathered, the suggested focus of effort to ensure the optimum development of sustainable tourism in Rhodes is as follows:

- Seasonal extension: c. 60%
 - Via extended promotion of existing product and its extension (e.g. MICE, particularly conferences and incentives).
 - Via development of new products and experiences targeting new niche markets (e.g. gastronomy, hiking, cycling/mountain biking, yoga, golf and more; and classes: from art to cookery, languages to self-improvement) and events, which reflect Rhodes' 'sense of place' – see Section 6.7 below.
- Increase main season visitor value, through attracting new markets: 25%
 - Via development and promotion of cultural and natural environment experiences, which reinforce Rhodes' 'sense of place', so people choose Rhodes specifically, rather than a commoditised beach destination.
- Visitor management in peak season: c. 15%
 - Via techniques to manage visitor flows and reduce congestion at peak times in specific places.

The **most strategic challenge** is to increase off-season business, while maintaining main season business and potentially increasing its profitability and reducing risk, through diversification.

5.3 High-Level Objectives

Supporting the Strategic Aim and Vision are five clear 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 Section 6.7) each year for seven years.
5. To establish a year-round programme of events designed to attract the DMP's target segments.

PART 6

HOW WILL RHODES' GET THERE?

STRATEGY AND ACTION PLAN

6. How will Rhodes Get There? – Strategy and Action Plan

6.1. The Approach to Strategy

The essence of a DMP such as this is to manage the destination to the advantage of the tourism industry and the wider local community, so that it is economically, socio-culturally and environmentally beneficial and sustainable for the long term. The starting point is to obtain an understanding of the types of visitors who will deliver best against this requirement, i.e. visitors who will provide most value and contribute most to the destination's sustainability or impose least on the destination's natural resources, built heritage, and residents' tolerance. The destination must then:

- **Develop products and experiences** to attract and satisfy these types of visitors (market segments);
- Take steps to **minimise negative impacts**, particularly those caused by other types of visitors, who might contribute less in terms of value and sustainable behaviour; and
- **Focus destination marketing** on those preferred types of visitors.

A clear long-term vision for Rhodes has been set out above, with high-level objectives, which support it. In pursuit of this vision, a series of strategic priorities are identified below, followed by an action plan, which outlines actions that need to be undertaken to achieve this.

6.2. Brand Positioning

A clear brand identity, which both defines Rhodes and distinguishes it from all other destinations, is critical to establishing Rhodes' competitiveness. This provides Rhodes with a set of brand characteristics, which define its unique character and, thereby, enable it to stand out in a highly competitive marketplace. These brand characteristics should also underpin Rhodes' brand narrative – the stories Rhodes tells about itself.

The brand narrative, or series of narratives, flows from Rhodes' core character and brings it to life. It comprises themes that best articulate Rhodes' strongest, and ideally unique, visitor appeals. It represents the main messages Rhodes should use in communicating with its key audiences. As well as informing marketing communications, it should also guide the development of new visitor products and experiences.

Rhodes' core character is defined by primary and supporting brand characteristics and the brand's 'emotional takeout' – how Rhodes makes visitors feel. These too are important in guiding all development and marketing activities. These are as follows:

Value Proposition

Rhodes' value proposition – the distinguishing benefits it offers to visitors, which underpin its competitive identity and include the seeds of potential change – can be described as '**familiar, yet undiscovered**'.

This reflects the comfortably familiar current image of Rhodes, but also poses an intriguing challenge to those who are unaware of its other appeals and who might be open to exploring them. The focus is on 'Rhodes beyond the beach', particularly with the aim of developing off-season business and increasing the value and distribution of main season visitors, by making them aware there is far more to Rhodes than they might have realised.

Rhodes is a destination in four parts, two of which are familiar and two are undiscovered:

- Beach, sun, sand and sea = main season core business: familiar – requires maintenance and nurturing;
- Cultural heritage and inland activities = main season revenue growth potential: undiscovered – modest new opportunity;
- Cultural heritage and inland activities = off-season growth potential: undiscovered – significant new opportunity;
- MICE = existing and off-season growth opportunity: familiar, but with further growth potential.

The main challenge and consequent approach to changing Rhodes image can be summarised as:

- Business Challenge: One-dimensionally popular destination – reflecting the dominance of main season beach holidays.
- Positioning: "Familiar, Yet Undiscovered"
- Brand proposition: "Historic beach": beyond the beach – layers of history, surprisingly green, refreshingly active – intriguing and invigorating.

Brand Characteristics

Primary brand characteristics:

- Cultural heritage;
- Natural environment (hills, forests, sea);
- Beach/sun/sea plus ... history, outdoor activities.

Supporting brand characteristics:

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

Emotional take-out:

- Absorbing and invigorating.

Brand Narrative Themes

A brand narrative is the story, or series of stories, a destination tells about itself, which reflects its distinctive character. They should become integral to Rhodes' marketing communications and inform the type of products and experiences it develops to attract visitors. The themes are based on Rhodes' strongest brand characteristics. They incorporate elements of Rhodes – products, experiences, concepts and imagery – which support the stories Rhodes should tell about itself.

Theme	Stories	Supporting Products, Experiences, Concepts and Images
Undiscovered Gems	<ul style="list-style-type: none"> • Rhodes beyond the beaten track – surprisingly rural, unusually green, culturally diverse • Folklore, mythology. 	<ul style="list-style-type: none"> • Countryside – nature (hills, forests, coastal scenery) • Cultural heritage: see below • Rural villages • Folk tales.
Landscape variety	<ul style="list-style-type: none"> • Unusually green for an Aegean island • Rural environment: mix of small-scale agriculture and natural, uncultivated landscape. 	<ul style="list-style-type: none"> • Forests, hills, rural character, coast, beaches • Space, tranquillity.

Diversity of culture	<ul style="list-style-type: none"> • Hugely mixed and intriguing cultural heritage – from ancient Greek times through Ottoman empire to Italian occupation and contemporary independent culture • Folklore, mythology. 	<ul style="list-style-type: none"> • Ancient – Hellenic & Roman: Lindos acropolis, Rhodes old town; Kamiros; Tsambika monastery; Olympic stadium; Archangelos castle temples of Aphrodite and Apollo et al; Great Hammam, and multiple sites that are evident throughout Rhodes; famous ancient Roman school of oratory • Ottoman-Venetian period: cultural influences and extant architecture • Medieval: Rhodes old town • Italian era: buildings in current use and derelict • Contemporary: Kallithea baths renovation, contemporary arts events and expression.
Colossal characters	<ul style="list-style-type: none"> • 'Colossal characters' associated with Rhodes (e.g. 'Three Cs': Colossus, Cicero, Caesar) • Colossus as global concept – origin in Rhodes. 	<ul style="list-style-type: none"> • Cicero and Julius Caesar studied in Rhodes • Colossus associations: <ul style="list-style-type: none"> - Speculation about ancient statue - Associated mythology - Etymology – leading to 'colossal' in several European languages - Attribution both to physical structures (e.g. Colosseum) and conceptual constructs (e.g. 'colossal' change).
Active escape	<ul style="list-style-type: none"> • Room to breathe • (hills, forests, ocean) • Hard and soft adventure • (cycling, hiking etc.). 	<ul style="list-style-type: none"> • Hiking trails • Cycling trails • Yoga retreats et al • Educational/special interest/self-development • Golf (aspirational?).
Sun and sea plus	<ul style="list-style-type: none"> • Sun and sea as a defining 'wrapper' for all Rhodes-based experiences. 	<ul style="list-style-type: none"> • All of the above, but in a bright, sun-blessed island environment (both main and off-seasons).

6.3. Target Markets

Market segments have been provisionally prioritised according to their current and future potential to deliver sustainable tourism for Rhodes. This is based on an assessment of the relative value of each segment versus its estimated impact on the islands in terms of sustainability. The following criteria have been taken into account in prioritising these segments:

- **Value:** Current and future potential value (e.g. volume x spend x repeat visit propensity);
- **Sustainability:** Impact on the island's natural environment, physical infrastructure, resources, and community (e.g. propensity to spread benefits around the island, visit outside the main season, consume fewer scarce resources, minimise congestion, contribute towards heritage preservation and natural environment conservation).

The most attractive segments are those that offer greatest value and contribute most in terms of sustainability/least negative impacts, as explained below. 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 islands. Segments have been identified by geography (country of residence) and lifestyle values/travel motivation. The analysis looks at both existing and potential markets, with a view to assessing the role each segment could play in shaping the direction of the DMP – and therefore the visitor experiences, products, and visitor-related infrastructure that should be developed – i.e. value x contribution towards a sustainable visitor economy.

Potential Target Geographical Markets

- **Primary markets:** While INSETE reports indicate the most valuable visitors to the southern Aegean come from Germany, UK and France, in that order, airport arrivals for Rhodes specifically show by far the largest numbers come from the UK and Germany. All these markets offer a significant volume of outbound travellers, but it is the preponderance of segments in the UK and Germany, to whom Rhodes' visitor products and experiences most appeal, which marks them out as continuing to represent Rhodes' best prospects over both the short and medium-term future. Further segmentation and targeting, as identified below, will enable Rhodes to optimise the contribution from these valuable markets.
- **Secondary markets:** Other countries offering significantly lower, but still reasonable, potential include Sweden, Poland and Israel.

- **Tertiary markets:** Based on Rhodes airport arrivals data, Russia, Italy, France, Denmark, Finland are the next most valuable markets. Russia previously generated significant traffic to Rhodes, but this has fallen off dramatically in recent years. It should therefore be watched for any prospects of future resurgence.

Existing Target Markets Based on Lifestyle Values/Travel Motivation

Travelsat data identifies two major segments for the southern Mediterranean as:

- 'Cultural visitors', for whom Greece offers interesting sites, but which perform below the southern European average in terms of visitor assistance and 'sense of place';
- 'Foodie visitors', whom Greece "absolutely delights" (Travelsat Competitive Index, March 2019). However, for purposes of segmentation, food has been treated as an appeal transcending most segments, but not as a primary motivator of travel.

Segments, which provide significant, and largely main season, volume, but less value per visit than independent travellers are:

- "Sun and sea/beach worshippers" – families and youth groups, often on all-inclusive basis;
- "Cruise visitors" – mixed age groups, but predominantly older couples.

Future Market Growth Potential

Segment Priorities

Based on a combination of market size and different destination appeals in the main and off-seasons, key segments with greatest current value and most sustainable growth potential for Rhodes, particularly beyond the main season, are:

- "Culturally curious" visitors from UK and Germany, followed by Netherlands and Sweden;
- "Outdoor enthusiasts" from UK and Germany, followed by Netherlands and Sweden;
- "Off-season short breakers" from UK and Germany, followed by Netherlands, Poland, Israel and Russia;
- "Special interest devotees" from UK and Germany, followed by Netherlands and Sweden;

- MICE – primarily small conference and incentive visitors – from UK and Germany, followed by Sweden.

Segment Profiles

- **"Culturally curious"**: Generally older, empty-nester couples, for whom culture, and particularly built heritage and its interpretation, is an important element of a visit and, for a minority, the primary motivation for travel. However, few will want to spend every hour of every day visiting cultural sites. Rather, the availability of extant historical remains and well-interpreted cultural sites will endow a destination, such as Rhodes, with a competitive advantage in attracting these people compared to other destinations, which might be otherwise similar but don't offer a critical mass of cultural products.
- **"Outdoor enthusiasts"**: Younger couples and groups of friends, whose destination choice is driven by a desire to participate in outdoor sports, such as watersports, hiking, cycling, golf et al. The availability of outdoor activities is a major component of their trip – from 'hardcore' enthusiasts, whose itinerary is almost exclusively focused on their preferred activity, to 'softer' adventurers, who may also enjoy a wider range of other, non-outdoor destination experiences in addition to outdoor activities.
- **"Off-season short breakers"**: Mostly couples, spanning a wide age range, from cooler northern hemisphere climates within c. 3-4 hours' flight, seeking a short break in a destination that offers good accommodation and food, plus interesting sightseeing options, in a slightly warmer climate than their own, largely in late autumn and early spring.
- **"Special interest devotees"**: Singles, couples and small groups of friends, spanning a wide age range, who travel to learn a new talent, improve their existing skills, or merely pursue an interest, in structured classes or retreats – e.g. from painting to yoga, language learning to pottery et al.
- **"MICE"**: Primarily conferences and incentive visitors, largely outside the main season.
- **'Sun and sea/beach worshippers'**: Couples, families, and youth groups, predominantly from northern/central/eastern Europe, whose primary motivation for travel is relaxation in a warm climate. For couples and families, the availability of other attractions adds a secondary appeal; whereas, for youth groups, vibrant nightlife is an important driver of destination choice. Frequently on an all-inclusive package, the relationship between quality and price plays a significant part in their destination choice.
- **"Cruise visitors"**: Mostly 'empty-nester', older couples, plus some younger couples and groups of younger people, visiting several islands in the Aegean, whose time on any one island tends to be limited to day shore excursions of about five hours.

6.4. Strategic Priorities

The primary focus of this DMP is on six Strategic Priorities, each with a set of action areas. The six Priorities proposed are shown below. They are derived from the knowledge acquired from research, consultation and analysis set out in previous sections. In particular, they reflect the opportunities and challenges set out in Sections 4.11 (SWOT) and 4.12 (Challenges) and the Strategic Aim and Vision in Sections 5.1.

Strategic Priorities for Destination Management in Rhodes

The Strategic Priorities for Destination Management in Rhodes are

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

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

The Action Areas relating to each of the Six Strategic Priorities and the two supplementary categories are set out in the following table:

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	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Clear brand identity, differentiating Rhodes from competitors.• All-year-round tourism, with high value market segments and related products

Reducing dependence on sun, sea, sand - but maintaining/ nurturing main season volume business	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Engaging and supporting the communities • Creation of Rhodes Signature Routes • Activity development • Supporting MSMEs – business development skills • Strengthened local supply chains (especially for food, wine, crafts and souvenirs)
6. Enhancing the Visitor Experience Focusing on quality	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Legal framework for crisis response • Operational framework for emergency response • Crisis management plan • Crisis recovery plan
Enabling/ supporting actions (cross cutting)	<ul style="list-style-type: none"> • Industry education and training • Research and intelligence • ICT systems and applications • Performance measurement/management

The diagram below shows the intended impact of the strategic priorities (the inner rings) on each of the four primary beneficiaries of the DMP (the quadrants) - see Section 3.1 above. Each priority impacts on two or three of the beneficiaries; and each beneficiary is served by between two and five of the strategic priorities.

6.4.1 The Strategic Priorities and Beneficiaries in Rhodes



-
- | | |
|---|---|
| ● SP1 - Rhodes for All Seasons | ● SP4 - Managing Visitors in the City |
| ● SP2 - Repositioning Rhodes: | ● SP5 - Extending the Footprint |
| ● SP3 - Creating Sustainable Rhodes | ● SP6 - Enhancing the Visitor Experience |
-

6.5. Action Plan

For each of the Action Areas outlined above, there is a set of recommended actions. These are set out in the Action Plan, which is contained in Annex 1.

6.6. Marketing Plan

This marketing plan sets out a method of attracting the sort of tourism that will underpin a sustainable tourism economy in Rhodes. In preparing this plan, the following critical issues have been taken into account:

- **Sustainability:** The focus is 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 activities is proposed, 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 Rhodes, targeting those who will deliver most benefits with least negative impact, particularly those more likely to stay longer, spend more, return, and visit outside the main season.
- **Product-market fit:** Marketing investment should also focus on those who would most appreciate Rhodes' range of appeals and therefore be likely to spend more, particularly outside the main season.

Current Situation

Rhodes is disproportionately dependent on summer season visitors, who are primarily motivated by sun, sand and sea and favour all-inclusive accommodation packages.

Seasonality is a long-term challenge for Rhodes, as it is for other Greek islands. While predominantly a June-September/October destination, international air arrivals in the early shoulder season (April-May) recently showed some growth, but the months November to March continue to show virtually no direct international air arrivals. This represents a major challenge to the commercial sustainability of the tourism industry; but also a major opportunity, as identified elsewhere in this report.

The relatively monolithic image of Rhodes as a beach destination has so far masked its other appeals and thereby hindered the development of off-season business.

Consequently, Rhodes is underperforming its tourism potential, in two major areas:

- Underutilised capacity in the off-season;
- Failure to optimise value and spread spending to businesses throughout Rhodes.

Marketing Strategy

The marketing strategy is focused on achieving the marketing objectives and removing the barriers to sustainable growth outlined above. These objectives call for a phased marketing strategy, split between development and promotional phases.

The marketing strategy focuses on those market segments that offer the best potential to deliver against the strategic priorities outlined above, which will, ultimately, contribute towards sustainable tourism growth. This means focusing on markets offering the greatest value at the time of greatest need, while still maintaining the dominant visitor-producing markets.

The rationale underpinning the three major marketing objectives is as follows:

- **To extend the season into the shoulder and off-season months:** in order to optimise the value of tourism to Rhodes, by filling or reducing underutilised capacity in the off-season. This is important to ensuring business profitability, particularly for smaller businesses throughout Rhodes, so that they can afford to refurbish to the level of quality required to attract increasingly higher-spending visitors throughout the year. It is also important to ensuring the economic sustainability of a critical mass of businesses, whose variety will underpin Rhodes' appeal to visitors and, hopefully, inspire repeat visits.
- **To increase main season visitor value, through attracting new markets:** in order to attract the best possible revenue contribution from visitors to businesses and the economy throughout Rhodes. This means providing reasons for visitors to spend more and travel further afield in Rhodes – from the development of new products and experiences to providing compelling marketing messages and targeted, up-to-date information about things to do, see and experience throughout Rhodes.
- **To manage visitor flows and reduce congestion at peak times in specific places:** in order to minimise the impact of tourism on residents' daily lives, enable the efficient functioning of all Rhodes infrastructure, and ensure the visitor experience is not compromised. In addition to physical and regulatory management responses, this relies on a marketing response, whereby visitors are

providing with clear, up-to-date, practical information on getting around and on things to do, see and experience throughout Rhodes.

Marketing effort should be invested where it can make most impact, in the short-medium-term. These objectives call for a phased strategy, whereby increasing visitor value and managing visitor flows can be addressed through immediate promotional and informational activities. Addressing the seasonal extension objective, however, requires effort to be focused initially on attracting new/extended direct off-season air routes. Only when these routes are confirmed can off-season packages begin to be developed and promoted.

Marketing Objectives

In the light of the currently limited visitor season and predominance of all-inclusive packages, the main challenge is to increase off-season business, while maintaining main season business and potentially increasing its profitability and reducing risk, through diversification. This means attracting higher-spending, longer-staying independent visitors, particularly in the shoulder- off-season periods

Consequently, the marketing plan focuses on three main objectives:

1. To extend the season into the shoulder and off-season months*;
2. To increase main season visitor value, through attracting new markets;
3. To manage visitor flows and reduce congestion at peak times in specific places.

N.B. There are two major barriers to off-season development, which need to be overcome:

- Limited **airlift**, particularly direct flights from international markets;
- The limited number of **tourism businesses** open in the off-season.

Target Markets and Segments

Based on current visitation and future potential (market size – population, proximity and propensity to return, shoulder- off-season potential, and match between visitor interests and the Rhodes offer), the following market segments represent Rhodes' best prospects to deliver against the marketing objectives.

Segments are described according to their primary motivation for travel or their reason for choosing Rhodes (e.g. "Culturally Curious", "Outdoor Enthusiasts"). This does not mean they will focus exclusively on these activities – e.g. "Culturally Curious" visitors

may also be interested in hiking; and the appeal for "Outdoor Enthusiasts" may lie not just in outdoor activities, but also in Rhodes' cultural environment. Like most people, they are not one-dimensional. But the value of defining segments in this way helps determine the marketing messages to which they are most likely to respond favourably.

These market segments are prioritised according to primary and secondary potential, in terms of their ability to deliver against the marketing strategy objectives.

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

Primary Segments:

- "Culturally curious" visitors from UK and Germany;
- "Outdoor enthusiasts" from UK and Germany;
- "Off-season short breakers" from UK and Germany.

Secondary Segments:

- "Off-season short breakers" from Sweden, Poland, Israel and Russia;
- "Special interest devotees" from UK and Germany;
- MICE – primarily small conference and incentive visitors – from UK and Germany, followed by Sweden.

Priority 2: "Maximise Value" (Years 1-5 ongoing)

Segment:

- "Culturally curious" visitors from UK and Germany.

Priority 3: "Maintain and Nurture" (Years 1-5 ongoing)

Primary Segments:

- "Sun and sea/beach worshippers" – families and youth groups, from UK and Germany;

Secondary Segments:

- "Sun and sea/beach worshippers" – families and youth groups, from Sweden, Poland and Israel;

- "Cruise visitors" – mixed age groups, but predominantly older couples, from Europe and USA.

While the main focus of marketing investment will be on primary segments, secondary markets can also be serviced by a destination website and targeted via online activities and inclusion in GNT0 marketing collateral at limited cost, as much of this activity will depend heavily on human resource – i.e. time rather than money.

Marketing Tactics

In preparing this plan, the following critical issues have been taken into account:

- **Sustainability:** The focus is 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 activities is proposed, 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 Rhodes, targeting those who will deliver most benefits with least negative impact, particularly those more likely to stay longer, spend more, return, and visit outside the main season.
- **Product-market fit:** Marketing investment should also focus on those who would most appreciate Rhodes' range of appeals and therefore be likely to spend more, particularly outside the main season.

Given the relatively limited marketing resources likely to be available to promote Rhodes in key markets, the following is proposed as the most cost-effective mix of marketing tactics to achieve the short-medium-term marketing objectives outlined above. The extent to which these activities can be carried out will be subject to resource availability – both human and financial. See Marketing Action Plan in Annex 2 for estimated costs.

- **Website** covering key elements of Rhodes (e.g. activities, experiences, attractions, excursions; accommodation; transport/access; produce etc.), with links to businesses for booking. The 'what-to-see/do' section should be themed in line with Rhodes brand narratives and reflect Rhodes' brand values. This could be a development of the current VisitRhodes.com website <https://www.visitrhodes.com/> or other solution.

- **Inclusion in Greek National Tourism Office (GNTO)** campaigns, website and brochures, especially through the provision of stories, information and imagery, which reflect Rhodes' brand values and narratives, to ensure optimum and appropriate coverage of Rhodes in GNTO marketing material and communications.
- **Social media** campaigns, themed according to Rhodes brand narratives for relevant market segments.
- **Public relations (PR):** Work with GNTO head office, European offices and their PR agencies to:
 - Ensure appropriately nuanced messages, including **press releases/blogs/vlogs**, about Rhodes are distributed to targeted consumer and travel trade media in key markets;
 - Encourage **press/blogger/influencer visits** to Rhodes, which inbound tourism operators on Rhodes should be willing to host as a contribution to the island's marketing effort.
- **Travel trade:** Work with GNTO head office, European offices and their PR agencies to:
 - Organise overseas travel trade (tour operators and travel agents) **familiarisation trips** to Rhodes, which inbound tourism operators should be willing to host as a contribution to the island's marketing effort;
 - **Travel trade PR:** see PR above.
 - Work with airlines, overseas tour operators and inbound tourism operators on Rhodes to develop and promote **shoulder- off-season packages** in key markets.
 - Consider participating, with local commercial operators, on the Greece stand at key **international trade exhibitions** (World Travel Market, London and ITB Berlin), to increase the number of international tour operators including Rhodes in their programmes and to influence their content, particularly with regard to off-season products.

N.B. In carrying out these tasks, it is essential that the focus is single-mindedly in pursuit of the marketing objectives, and that any external agencies are briefed and managed accordingly

i.e. The emphasis should be on maximising value from existing markets and attracting new off-season visitors; messaging should be more nuanced in terms of promoting experiences and times of year when there is spare capacity and accessibility from key markets.

With additional resources, further activities, such as more extensive social media and above-the-line campaigns, PR initiatives, and trade roadshows can be added, subject to a critical assessment of the potential return on investment and budget availability.

Marketing Action Plan

A more detailed marketing action plan is attached at Annex 2. This summarises target market segments, by country, which offer the best prospects to help Rhodes achieve its marketing objectives. It also identifies the main products that will appeal to these markets and the marketing communications tactics that should be used in targeting each market segment. The final two columns identify key performance indicators for measuring success and provide indicative resource implications for each activity.

6.7. Visitor Experience and Product Development

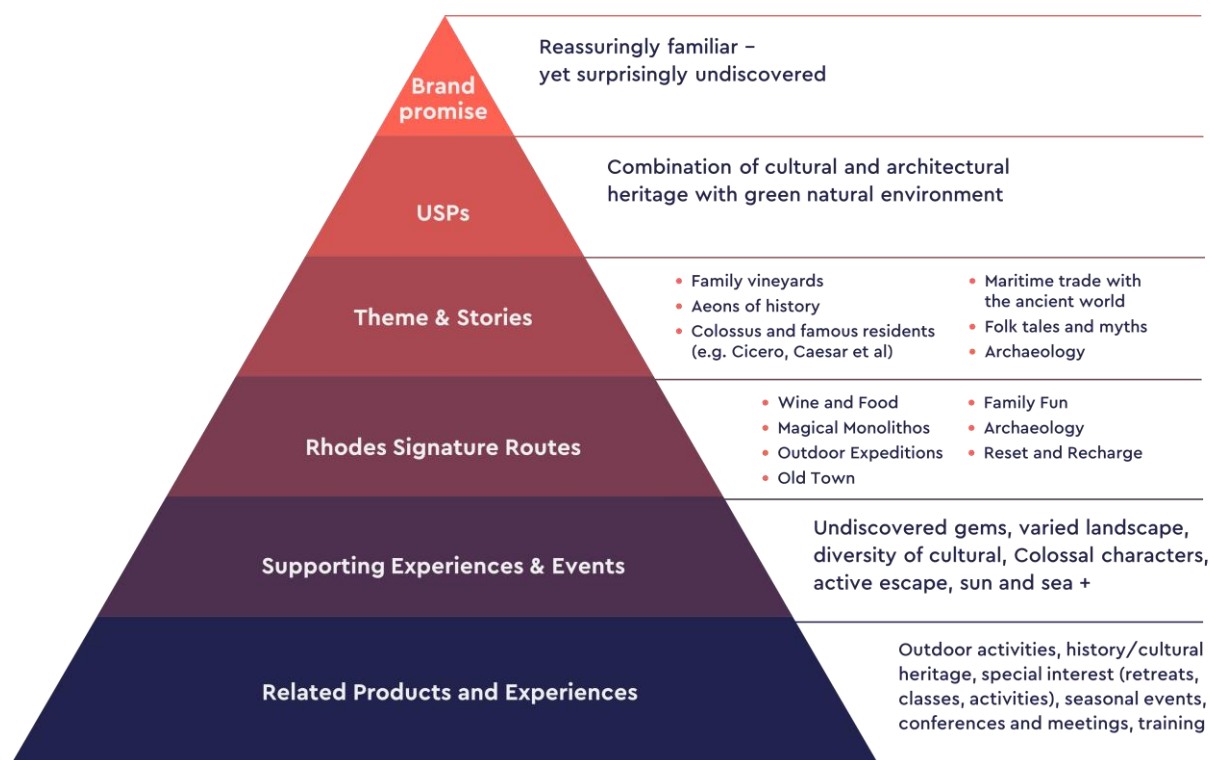
Developing a sustainable tourism economy for Rhodes as outlined above depends on creating visitor experiences that appeal to the types of visitor Rhodes wants to attract. A series of themed visitor experiences have been identified, which project Rhodes' brand narratives.

Global trends indicate that tourists are increasingly seeking authentic experiences – something unique and fulfilling, beyond a 'check list' of sights to see or photo opportunities. It is these experience seekers who are most likely to come to Rhodes during the off-season. They are culturally curious, enjoy the outdoors and/or have particular interests – creative, artistic, and health and wellness.

The extended-season travellers are likely to be mostly couples, those with higher income and no children, and empty-nesters, coming from the UK and Germany and, secondarily, from the Netherlands, Sweden, Poland, Israel and Russia. They are likely to be predominantly independent travellers.

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, going down the pyramid, each layer 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.

6.7.1 Visitor Experience Pyramid - Rhodes



Rhodes' 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 both in the main season beyond the beach and 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. A visit to Rhodes in the off-season will be culturally rich, in terms of sights and activities, thus rendering the experience both absorbing and invigorating.

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'** has been 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 have been identified, to fulfil the experience needs of the priority market segments defined above for extending the season. Identifying experiences all around the island will help to spread visitor time and spend into these areas, creating positive economic impacts for local communities and reducing peak season pressure points.

The seven proposed **Rhodes Signature Routes** are as follows:

A. The Best of Rhodes' Wine and Food

The 'Best of Rhodes' Wine and Food' Route would bring together the leading vineyards and fine dining experiences, in the principal wine-producing areas of Rhodes. Appealing to wine enthusiasts, and those who seek exciting gastronomy experiences, this Route will provide ideal 'warm winter breaks', while appealing equally to those who come for cultural or outdoor experiences, looking for a few days of fine wine and food. The outstanding work undertaken already, as part of 'South Aegean Cuisine' provides an excellent foundation for this Signature Route.

B. Magical Monolithos

The 'Magical Monolithos' Route is designed around the natural paradise of Monolithos, providing visitors with magical, peaceful experiences – hiking or biking in its mountains and relaxing at its hidden beach coves. Monolithos is also the gateway to Ancient Kymissala, a vast archaeological treasure, soon to be open (via special routes) to visitors keen to explore by foot. Providing a rejuvenating escape, Monolithos appeals to outdoor enthusiasts, the culturally curious, as well as artists and writers seeking an inspiring retreat.

C. Rhodes Outdoor Expeditions

The Rhodes Outdoor Expeditions Route brings together a wide range of existing and potential activities in several areas of the island, including hiking, mountain biking, cycling, climbing, kayaking, canoeing, horse riding, windsurfing and kite surfing. Rhodes provides the ideal all-year round outdoor destination, with 300 days/year of sunshine, when other parts of Europe are not accessible for outdoor activities during the winter months.

D. Rhodes Old Town

This is a signature experience of Rhodes, which lends itself to further interpretation and entertainment for a wide range of segments, from culturally motivated visitors to families. It also offers a significant attraction outside the main season, by virtue of its position in the City and its offering many indoor attractions.

E. Rhodes Family Fun Days

The Rhodes 'Family Fun Days' Route provides numerous activities and experiences perfect for family breaks at other times of the year – as a sunny escape from Europe's darker winter days. This will include the rich culture and history around Rhodes City, as well as nature-escapes – butterflies and bees. Adventure seeking families can enjoy winter day sailing, mountain biking and hiking experiences.

F. Archaeology Adventure

The Rhodes 'Archaeology Adventure' Route is a longer, immersive tour, where visitors can fully appreciate the island's history and beauty. Rhodes provides many spectacular archaeological sites – both ruins and buildings, some of which continue to be used regularly, as museums, festival venues, and more. These have potential appeal to the culturally curious, seeking a warmer, winter break.

G. Reset and Recharge in Rhodes

The Rhodes 'Reset and Recharge' Route would promote the idyllic setting of Rhodes for winter breaks to reset and recharge through an array of specialised retreats. Wellness retreats have a rapidly growing market segment globally, cover a broad range of interests and needs: nutrition/weight loss/detox, exercise (i.e. yoga, Pilates), meditation, but also activities that nourish the mind and creative spirit, like writing, art and cooking. The natural beauty, views and peaceful places found around Rhodes give the visitor the ideal backdrop to engage in these experiences. Individuals, couples, and small groups from across Europe with special interests, will find Rhodes an ideal off-season retreat.

Recommended actions to create or enhance specific experiences along each of these routes are included in Annex 3. These actions are totally consistent with the Region of South Aegean's €15.3m 'Experiential Tourism' initiative, outlined in the next section.

Annex 3 also includes a broader review of the island's resources that could be used in an ongoing effort to enhance visitor experiences.

6.8. Investment Opportunities

Current and planned investments in development projects are outlined in Section 4.8. The following are particularly relevant in terms of creating opportunities for third party investment

Region of South Aegean's 'Experiential Tourism' initiative – budget of €15.3 million, much of which remains to be allocated. It has four priorities:

1. Diversify the Tourism Product through quality improvement and experience enrichment (€7.8 million)
2. Expand the value chain of the tourism sector through upstream and downstream interrelationships (€2.6 million)
3. Use information and communication technologies (ICTs) (€2.05 million) – priority increased in 2019.
4. Develop new skills and knowledge (€2.9 million)

Funds were allocated also for the protection of natural environment and the use of green technologies (€6 million total budget for agriculture, processing and tourism).

In 2019, there was a revision of priorities and actions for the development of 'Experiential Tourism', with emphasis on the overall use of ICT in the tourism sector certain areas.

Municipal projects (with Regional support) that will create opportunities for third party investment include

- [Renovation of the city of Rhodes East Waterfront](#): Approval in September 2018 of project with EU funds from the Region with emphasis on boosting entrepreneurship and providing residents and visitors with access to contemporary infrastructure.
- [Medieval Town Technical Studies and Works](#): Subject to final approval within 2019 of a 10-year co-funded project by several stakeholders including 2 ministries and the Region based on EU funds.

Two major private sector projects, with total investment estimated to exceed €500 million, are being planned for the Afantou area (on the east coast of Rhodes, just south of the resort town of Faliraki) on land sold by the Greek Asset Development Fund, TAIPED, in 2019:

- In North Afantou, a €26.9 million resort project by M.A. Angeliades Inc: this will include a golf course, a new luxury hotel and multiple vacation homes;

- In South Afantou, a project by TN Aegean Sun Investment Ltd, will include three large luxury hotels and 20 vacation homes.

Regarding the Strategic Priorities, the following Action Areas are the ones that are most likely to create investment opportunities:

New experiences and events	Section 6.7 sets out proposals on Experience and Product Development, primarily related to the seven 'Rhodes Routes', of which 'Magical Monolithos' and 'Rhodes Outdoor Expeditions' are likely to require the most capital spending. The proposals are totally in line with the four priorities within the South Aegean Region's 'Experiential Tourism' initiative, as outlined above. This represents a significant source of funding for projects in line with any of the four priorities.
Action on infrastructure	Section 4.3 noted current infrastructure investment plans relating to water supply, port improvements, waste disposal and urban development. Whilst these will not offer direct opportunities for tourism investment, in some cases they may enable future development projects.
Improved transportation for visitors	If new markets are to be attracted to Rhodes, including a higher proportion of independent travellers who wish to explore the island as a whole or to engage in active recreation in the interior or at the coast, new opportunities may arise for flexible transport and tours, requiring innovative and entrepreneurial solutions.

6.9. Performance Monitoring and Management

Monitoring

Progress against the DMP's strategic objectives (Section 5.3) and actions (Annex 1) should be monitored on an ongoing basis and the action plan adjusted where necessary. The Action Plan in Annex 1 identifies performance measures that should be initiated at the same time that the actions are implemented. In due course, key performance indicators can be established, relating to these measures, which will enable the local implementation body to evaluate progress.

In addition to ongoing monitoring of activities, an annual 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.

Perhaps most important of all is to have **simple measures of overall success** in terms of **sustainability**, relating to the four potential 'beneficiaries' of the DMP; for example:

- **Community:** perceptions of the net value of tourism to the community, through an annual survey open to residents of Rhodes; 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 in Rhodes; using a scale of -5 to + 5
- **Visitors:** satisfaction of visitors (especially 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 measures.

PART 7

GOVERNANCE OPTIONS FOR DMP IMPLEMENTATION

7. Governance Options for DMP Implementation

7.1. The Value of Destination Stewardship

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

7.2. The Governance and Funding of Destination Management

Implementing the DMP must be underpinned by a governance structure that encourages a variety of synergies. The differential level of involvement by public and private sectors will determine the shape of the governance structure. An initiative mainly driven by the private sector⁴⁰ would require a rather high level of consensus among businesses of different sizes and in different sectors along with a minimum, yet regular, capital contribution by all partners. The failure of such widespread commitment by businesses would result in a 'free-rider' effect, whereby non-contributing businesses would benefit at the expense of those prepared to invest in DMP implementation – an unsustainable situation, which would be unlikely to last long. Besides financial constraints such an initiative would also face challenges in developing suitable destination management solutions in the absence of the public sector's active involvement.

Those business models where the public sector plays a leading or facilitative role (e.g. government organisations, non-profit organisations) are regularly supported from government funding (e.g. room tax). However, place-specific conditions shape the longevity⁴¹ and utilisation of such financial resources. In Greece, the revenues derived by municipal authorities from the bed tax⁴² (0.5%) and the revenues of the room-stayover tax (€0.5-4) collected by the Independent Authority for Public Revenue are not hypothecated- i.e. the deployment of these revenues is not tied to tourism-related projects at respective destinations. Also, this revenue would neither support the full

⁴⁰ e.g. a cooperative of tourism businesses based on the provisions of Law 1667/1986 as amended by Law 4430/2016 or a civil non-profit company according to the articles 741-784 of the Civil Code

⁴¹ In 2009, the bed tax decreased from 2% to 0.5%, decreasing the revenues of municipal authorities at the outburst of the economic crisis in Greece.

⁴² Law 339/1976 as amended by Law 1080/1980, Law 2130/1993 and Law 3756/2009

range of destination management projects nor would it be used exclusively to the benefit of the accommodation sector, which mainly bears the tax burden.

7.3. Three Scenarios for Synergistic DMP Governance in Rhodes

For the next five years, sponsorship and partnership programmes are expected to be the fastest growing revenue source worldwide in DMOs' annual budgets⁴³. Searching for sources of revenue that can enhance flexibility and speed, this section explores three scenarios under which local stakeholders can work together and make progress on delivering the strategic priorities of the DMP. Each scenario takes account of Greek experience regarding regulatory frameworks, policy-making at the local level, and ongoing projects of a similar kind. The centralised nature of policy-making in Greece would entail a necessary level of endorsement and active support from the Ministry of Tourism and other Ministries, as required in each case. Each scenario is also based on different assumptions, involves various opportunities and constraints, and outlines a unique framework that could:

- Highlight destination management as a key area of local policy-making, with a scope of activities that extends the tourism sector's traditional boundaries;
- Kick off information and resource sharing between partner organisations;
- Facilitate commitment to a strategic vision and objectives;
- Strengthen and expand partnership-building in the medium to long term;
- Resolve in certain cases implications derived from overlaps of responsibilities among public sector organisations.

Scenario 1: Creation of an Entity by one or more, Public and/Or Private Sector Stakeholders.

Such an entity would have a strong capacity to mobilise funds and engage a highly-skilled workforce, but it would first require demanding processes to take place (e.g. changes to legislation, establishment of a new entity).

- At the national level, it would be necessary to amend the framework for public and private partnerships⁴⁴. Since 2005, this framework has set the scene for numerous

⁴³ Destinations International (2019) [Destination Next Futures Study 2019 - A Strategic Road Map for the Next Generation of Global Destination Organisations](#).

⁴⁴ Law 3389/2005 as amended by Law 3463/2006.

projects with regard to the construction of public infrastructure and the provision of quality services to citizens. However, it has had limited application in the tourism sector and has not been associated with collaborative schemes that would implement the actions of a mid to long-term, strategic plan.

- At the local level, it would be necessary to amend the legislation of development companies⁴⁵. The scope of destination management plans should be added to exceptions of special purpose for the creation of more than one development company under municipal authorities⁴⁶. Such an amendment would enable the establishment of a dedicated development company under the Municipality of Rhodes. The new entity would be responsible for implementing the DMP in cooperation with other actors (e.g. the Region of South Aegean, tourism industry associations, other business groups, educational institutions).
- At the local level, another option would include an amendment of legislative terms and provisions with regard to 'Networks of Municipalities and Regions'⁴⁷. The importance of destination management for Greece's top destinations could be the basis for extending the scope of these networks, which are broadly related to promoting inter-regional cooperation within the EU. As a civil non-profit company, a potential 'Network of the Municipalities of Rhodes and Santorini' would undertake the implementation of both DMPs in cooperation with the Region of South Aegean and local stakeholders from both islands.

Scenario 1 Assessment

PROs	CONs
<ul style="list-style-type: none"> • Public sector stakeholders to assume a leading role in short-term partnership-building within a legal framework with specific obligations (e.g. roles, liability, ownership of partnership property) • Public sector stakeholders to shape an inclusive agenda of destination management planning • Diversity of funding sources (programmatic agreements⁴⁸, EU grants, partnerships, sponsorships, charities with regard to the provision of goods, services and projects⁴⁹, etc.) • Specialisation of legislation for public-private partnerships and common initiatives with regard to the 	<ul style="list-style-type: none"> • Public sector funding may dominate initial stages of the partnership • Public sector stakeholders to define call to action for the private sector's involvement in decision-making, funding, etc. • Requires a high level of consensus among private sector stakeholders (industry associations) – renegotiation may be problematic • Individual businesses may get involved once collaboration becomes more mature • Time-consuming legislative work • Time-consuming processes for organisational set-up

⁴⁵ Law 3463/2006 as amended by Law 3852/2010 and Law 4555/2018.

⁴⁶ Law 4555/2018 (Article 183, Paragraph 1, Item b).

⁴⁷ Law 3463/2016 (Articles 219 & 220) and Law 3852/2010 (Article 101).

⁴⁸ Law 3852/2010 as amended by Law 4555/2018.

⁴⁹ Law 4557/2018 (Article 55).

<p>implementation of destination management plans</p> <ul style="list-style-type: none"> • Staff recruitment under the umbrella of an advanced, organisational scheme beyond the common framework of public sector organisations. • Communication benefits for the public sector through the private sector's respective skills and activities. 	<ul style="list-style-type: none"> • Time-consuming processes for project implementation (e.g. the legality of programmatic agreements is subject to the scrutiny of the Court of Audit) • Lack of domestic experience on comprehensive destination management partnerships, especially under the frameworks of the first and third option as above.
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Scenario 2: Allocation of Responsibilities for Implementing the DMP to an Existing Organisation.

One existing company that could take on the role of DMO is 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. However, it has the problem of limited access to funding. because this type of municipal company is not allowed to sign programmatic agreements⁵⁰.

Another possible solution would involve a key role for 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. Supporting local business development, conducting studies and encouraging continuous professional development and knowledge-building have been at the core of DETAP's activities since 2000. A decision by the Chamber's Board of Directors would be necessary for revising DETAP's statute and incorporating a series of provisions for tasks related to the DMP's implementation (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 companies⁵¹. DETAP would then work closely with the municipal Directorate of Tourism, the Region of South Aegean and other local stakeholders.

A possible solution at the regional level would involve a leading role for the Region of Aegean mainly through its Development Agency – "ENERGIKI S.A." – a development company whose aims are:

- The scientific and technical support of local authorities and their associations and also the support of decentralised state administration;

⁵⁰ Law 3463/2006 (Article 265, Paragraph 4).

⁵¹ Law 4497/2017

- The promotion of entrepreneurial, economic and sustainable development of the local authorities as well as of the wider area;
- The development of environmental protection activities;
- The participation in programmes and the implementation of relevant policies at inter-municipal level or in a wider geographic area.

Putting the implementation of the DMP under the umbrella of the Region's Directorate of Tourism, the development company would act as a vehicle for mobilising domestic and EU funds towards Rhodes. The Region would then work closely (e.g. through programmatic agreements) with the Municipality of Rhodes and local stakeholders on selected actions. Staff additions would be necessary for facilitating and monitoring such an approach. Besides the Region's Directorate of Tourism, the Municipality of Rhodes also has a respective Directorate with two units; the first one focuses on marketing and promotion and the second on strategic planning. The Directorate of the Municipality of Rhodes has had a rich activity in recent years, so it would be necessary to ensure an assessment of existing skills before any further recruitment. This appears to be the best option under Scenario 2 and is used as the basis for assessment in the table below.

Scenario 2 Assessment of the option of the Region of South Aegean taking on responsibility for implementing the DMP through its Directorate of Tourism and ENERGIAKI S.A.

PROs	CONs
<ul style="list-style-type: none"> • A leading authority to assume the role of the DMP implementation body and enable short-term partnership-building within a legal framework with specific terms and conditions (e.g. allocation of projects and funds included in programmatic agreements, processes for stakeholder consultation) • Public sector stakeholders to shape an inclusive agenda of destination management planning • Requires a middle level of consensus among private sector stakeholders due to the strong role of public sector organisations • Diversity of funding resources (programmatic agreements⁵², EU grants, sponsorships, charities with regard to the provision of goods, services and projects⁵³) • Time-efficient processes for organisational restructuring. 	<ul style="list-style-type: none"> • Decisions by parent authorities over statutory amendments would be necessary before changes could be taken any further. • Public sector funding will dominate initial stages of DMP implementation • Dominance of public sector organisation/s may exclude private sector businesses from decision-making and thereby disadvantage them • Individual businesses may get involved once collaboration becomes more mature • Time-consuming processes for project implementation (e.g. the legality of programmatic agreements is subject to the scrutiny of the Court of Audit) • Staff recruitment strictly under the umbrella of a public sector organisation • Communication of DMP outputs and outcomes to be dependent mainly on the public sector's skills and activities.

⁵² Law 3852/2010 as amended by Law 4555/2018.

⁵³ Law 4557/2018 (Article 55).

Scenario 3: A Lighter and more Flexible Governance Structure than the other Scenarios:

This structure relies 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. Such a structure is already being tested in Greece's capital city. In 2018, the City of Athens, Aegean Airlines, Athens International Airport and the Greek Tourism Confederation (SETE) joined forces to form a unique public-private partnership called This is Athens & Partners. The partnership aims to bolster the city's visitor economy and establish Athens as an attractive destination for visitors, residents, professionals and investors.

The partnership has evolved from its initial formation in 2016 and is now committed to delivering a comprehensive 3-year €15M plan. The range of tourism-related development, management and marketing projects varies from urban regeneration schemes across Athens and the opening of closed shops in the centre of the city to the curation of events and gigs that will promote Athens as a contemporary cultural hub and a 2-year anti-tagging programme (e.g. removing graffiti tags and illegal posters from the historic centre) to curate the image of the city.

In the case of Rhodes, a similar initiative would require a high level of consensus, corporate ethics, and trust among founding partners (initially e.g. the Municipality of Rhodes, the Region of South Aegean and the Dodecanese Chamber) and a series of other arrangements for enabling good governance and the DMP's implementation:

- A 'Memorandum of Understanding and Cooperation' to define the scope and terms of the partnership and the key activities that each founding partner will undertake;
- An Executive Board, which will ensure the DMP's implementation through its decision-making capacity and the supervision of all activities undertaken under the partnership umbrella;
- A Steering Committee, which will coordinate day-to-day activities and the sound management of financial and human resources, in order to deliver the Executive Board's decisions;
- 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 the DMP's implementation;

- A second level of partnership members, to enable the private sector's active involvement in the scheme based on the same principles of a high level of consensus, corporate ethics, and trust;
- Fixed amounts of annual contributions by both founding partners and partnership members for an agreed period of time;
- Clearly articulated, specific obligations and benefits for both founding partners and partnership members;
- Framework of funding sources and fundraising options/processes.

Scenario 3 Assessment

PROs	CONs
<ul style="list-style-type: none"> • A higher level of private sector engagement, alongside key public sector organisations • Commitment to a joint strategic vision and objectives as part of a memorandum of understanding (culture of cooperation) • A dedicated agenda with clear roles and responsibilities • A more balanced distribution of funds between the public and the private sector from the beginning • Diversity of funding sources and fundraising opportunities • Staff recruitment under the umbrella of an ambitious partnership brand with influential partners • Communication benefits for the public sector through the private sector's respective skills and activities. 	<ul style="list-style-type: none"> • Lack of legal entity status and implications (e.g. contracts can be signed only by individual partners) • Negotiation capacity depends on individual members • Increased funding by the private sector may lead to lack of government control over policy priorities • Need for a high level of consensus and trust among key stakeholders and/or individual businesses – renegotiation can also be problematic • High level of risk associated with changes in the strategy of individual partners • Dependent on partners having the capacity to carry out their share of activities • Higher dependence (than other schemes) on inter-personal relations and the vision of personalities who first established the partnership.

7.4. Implications for Implementation of Governance

Each of these scenarios may be subject to further refinement to take account of the ongoing plans of key stakeholders (e.g. the new municipal administration of Rhodes), while a mixed approach could be sought (e.g. a MoU, in tandem with a more active role for the South Aegean Region Development Agency) too.

PART 8

CRITICAL SUCCESS FACTORS

8. Critical Success Factors

Factors that are critical to realising the Vision and implementing the actions for each Strategic Priority for Rhodes 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 the Dodecanese Chamber; collaborative effort between sectors will be essential to implementation of many elements of the plan, particularly 'Rhodes for All Seasons'.
- 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 Rhodes 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 this DM

ANNEX 1

ACTION PLAN RHODES

Annex 1: Action Plan

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

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

A template with these columns included has been provided to aid future planning.

'Live' Plan

The Action Plan should be kept 'live' as an ongoing framework for action to develop tourism in Rhodes. It should be reviewed formally at least annually. But it should also be refined and updated as circumstances change, so that it remains a highly practical document, which is both ambitious and realistic, strategically focused and action orientated.

Stakeholder Participation

In order to achieve optimum impact, the Plan should be shared with key stakeholders in Rhodes. They should be updated on progress, with challenges clearly articulated, successes highlighted, and community participation called for where needed. This will be important to secure widespread buy-in across the island, which will be important to ensure a sustainable future for tourism in Rhodes.

Destination Management Plan implementation organisation

In the Action Plan below, the 'Suggested Lead' is, in many cases, the 'DMO', the acronym for 'Destination Management Organisation'. This refers to the governance structure for implementing the DMP, the options for which have been outlined in Part 7. These options include a newly formed entity, an existing organisation taking on the role or an informal partnership of organisations, handling the responsibilities between them. In the context of this Action Plan, 'DMO' refers to whichever of these structures is selected by the key stakeholders in Rhodes

Strategic Priority 1: Rhodes for All Seasons

Creation and promotion of special year-round experiences to attract new markets in the winter – and also in the main season, extending the benefits of tourism more widely.

Action Area	Actions	Suggested Lead	Performance measures
New experiences and events	<ul style="list-style-type: none"> Extend activities: <ul style="list-style-type: none"> Active recreation: hiking (E4 Path/Knights' Trail?), cycling, mountain biking, rock climbing, golf, yachting/sailing, canoeing/kayaking, trail running, sailing regattas – see Strategic Priority 5 below; Cultural: storytelling; music and dance; archaeological experiences, traditional festivals featuring local products/culture – see Strategic Priority 6 below; Creation of an integrated, all year round events programme, designed for residents and target markets – including food and wine, cultural and sporting events in autumn and spring, New Year events, etc; Wellbeing and yoga; Special interest activities (e.g. art classes, writing workshops, olive picking experiences, ceramics, cooking, wine); Educational courses; Management development courses; Conferences and meetings – venues, quality management, destination marketing; Winter weddings; Golf tourism ahead of new investments at Afandou. Develop 'greeters' programme to welcome and assist visitors. 	Region (through Experiential Tourism initiative)	<ul style="list-style-type: none"> Purchase of packages. Usage indicators. Target markets' satisfaction ratings, from online surveys Conferences and meetings attracted to Rhodes – delegate numbers and spending estimates
Incentives for visitors and businesses	<ul style="list-style-type: none"> Develop and launch a programme of incentives for potential visitors and for tourism businesses, such as: <ul style="list-style-type: none"> Off season discounts (dynamic pricing) Special offers; Rent a car special offers – free parking; Reduced tickets for users of public transportation; Reduced tickets for archaeological sites and museums; Combined visitor discounts for multiple attractions within new itineraries/routes; 	DMO	Ticket sales for extended period

	<ul style="list-style-type: none"> - Energy and employment insurance costs for businesses 		
Creation and promotion of attractive off-season packages	<ul style="list-style-type: none"> • Create a special Task Force of the relevant key players (e.g. air carriers, Greek incoming tour operators (DMCs), accommodation operators, excursion/activity operators, restaurants, bars, shops, attractions) to create and trial off-season packages with international tour operators and organise an off-season package campaign in 1-2 target markets to promote, using the most effective media for those markets, including social media, hosting media & bloggers, trade familiarisation tours. <ul style="list-style-type: none"> - Define milestones from the mid to the long term with regard to the introduction of off-season packages (e.g. October to mid-November offerings built around culture and gastronomy; Christmas-based activities in the city of Rhodes in December) 	DMO	Ticket sales Airline slots off season Hotel occupancy Average visitor spending per trip / day Length of Stay
Growth of winter MICE markets	<ul style="list-style-type: none"> • Audit the existing business and events space; • Create Convention Bureau and a dedicated website for MICE buyers; • Itineraries and packages specifically for MICE buyers; • Packages potentially including transport, accommodation and event admissions as well as offers for visitors who wish to stay 'one more night' and explore Rhodes; • MICE marketing campaign with industry partners; • Niche opportunities for new offerings, notably small-scale environmental and retreat/teambuilding; • Business and events guide to encourage the MICE sector; • Working group for stakeholders with an interest in meetings & events; • Create calendar of future events – booked and potential; • Impact analysis of major conferences and events; • Identify potential funding sources; • Stimulate local organisation of new events sites/venues. 	DMO/ Convention Bureau	Bids made. Bids accepted. Value of events generated.

Strategic Priority 2: Repositioning Rhodes

Enhancing its image, broadening its appeal.

Reducing dependence on sun, sea, sand - but maintaining/ nurturing main season volume business.

Action Area	Actions	Suggested Lead	Performance measures
Clear brand identity, differentiating Rhodes from competitors.	<ul style="list-style-type: none"> Develop marketing and promotion plan with key brand narratives relating to Rhodes's core brand characteristics and guidelines to be followed/adopted by local stakeholders. 	DMO	Online survey measures of positive awareness in target markets
All-year-round tourism, with high value market segments	<ul style="list-style-type: none"> See Strategic Priority 1 above. 		
Attraction of high yield target markets, including more independent travellers (FIT)	<ul style="list-style-type: none"> Develop market segmentation framework and identify target markets that will provide greatest benefit to Rhodes; Focus on channels relevant to target markets – especially online channels; Initiate training programmes in online marketing. 	DMO	Exit surveys at Rhodes Airport
Increased focus on international conferences	<ul style="list-style-type: none"> Establish convention bureau as part of implementation structure. 	DMO/ Convention Bureau	Bids made. Bids accepted. Value of events generated.
A green island	<ul style="list-style-type: none"> Nurture current natural environment through ongoing maintenance and protected zones. 	Municipality	Natural environment quality measures.

	<ul style="list-style-type: none"> Promote the relative uniqueness amongst the Dodecanese islands of Rhodes' green natural environment. 	DMO	Online survey measures of awareness in target markets.
Broad marketing strategy to support repositioning	<ul style="list-style-type: none"> Audit of product representation in all major traditional and online domestic and key international travel trade channels leading to a programme of industry trade-readiness development and ongoing trade engagement; Host familiarisation for travel trade, media and key influencers; Build image and video library; Engage online travel agents to promote Rhodes internationally; Engage PR partner to develop pitches to target key publications, influencers, bloggers etc, particularly for major events; Develop series of short (1 min) videos for online use; Provide online portal (partner pages) of resources for partners to market their own business/events; Increase destination profile on key travel and lifestyle websites/platforms (TripAdvisor, airlines etc); Work with tourism partners to develop and distribute engaging content including social media posts, videos and photos that profile Rhode's unique experiences, enhance the brand, and deliver personalised experiences; Implement social media strategy incorporating key target markets (e.g. MICE messaging). 	DMO	<p>Sales indicators from key stakeholders and marketing partners – through real time data feed, where possible.</p> <p>Online survey measures of positive awareness in target markets.</p>

Strategic Priority 3: Creating Sustainable Rhodes

Enabling sustainability in terms of environment/ natural

Action Area	Actions	Suggested Lead	Performance measures
Relating tourism volumes to carrying capacity of Rhodes Town and Lindos	<ul style="list-style-type: none"> Limit growth in air arrivals at peak times; Control cruise ship numbers at peak times; Restrict cars entering centre of Rhodes Town, through 'park and ride/walk' scheme and increased visitor use of public transport; Extend opening times of visitor attractions in line with visitor demand; Review regulation of 'new platform tourism services' (sharing economy). 	Municipality	User statistics from all key players
Sustainable practices by tourism businesses	<ul style="list-style-type: none"> Design and deliver training programmes for green investments and practices of corporate social responsibility; Promote available handbooks on the subject^{54, 55 56 57} 	Chamber	Proportion of tourism businesses with relevant certification
Action on infrastructure – seaport, airport, roads, footpaths, cycleways, water, power, energy efficient	<ul style="list-style-type: none"> Action plans for each form of infrastructure, considering respective visitor needs for the next 5-10 years; Water and energy capacity assessment; Improvements to the built environment (street vegetation/waste collection bins/waste recycling/street cleanliness/visual pollution); Energy efficient lighting systems, particularly for external areas of resorts. 	Region/ Municipality	Satisfaction ratings amongst residents

⁵⁴ TUI Travel PLC, Guidelines for Environmental Sustainability in Hotels, March 2011

⁵⁵ [TUI Group, Plastic Reduction Guidelines for Hotels, February 2019](#)

⁵⁶ [Travel Foundation, Guidelines for meeting the Cyprus Tourism Organisation minimum standards for sustainability in hotel establishments](#), April 2013

⁵⁷ [IUCN, Siting and Design of Hotels and Resorts](#), 2012

lighting, transport			
Best practice waste management	<ul style="list-style-type: none"> Adopt best practice measures, including: <ul style="list-style-type: none"> Recycling of household and business waste; New landfill arrangements; Litter clearance from roadsides; 'Clean' industrial waste water (e.g. for vineyards); Single-use plastic practices. Design and deliver training programmes on practices of waste management ⁵⁸ 	Region/ Municipality	
Water and power conservation/ management measures	<ul style="list-style-type: none"> Training programmes in the practices of energy and water conservation; Create awareness amongst visitors of tourism's impact on water and power and elicit their cooperation in pursuing sustainable practices. 	DMO/ Chamber	Number and quality of trainees. Visitor attitude data from surveys
Quality management of public realm:	<ul style="list-style-type: none"> Prepare and implement an integrated plan for public realm management to ensure high quality of experience and enhanced sense of place - including street furniture, public art, beach management, etc.; Prepare design guidelines for new development; Ensure regular, efficient litter clearance in towns, villages and alongside all roads; Ensure street cleaning regimes fit with tourism facilities and with peak times. 	Municipality	Resident and visitor satisfaction ratings, from online surveys
Improved transportation for visitors	<ul style="list-style-type: none"> Publicise public transport timetable to key locations; Establish travel hub close to the Medieval City; Implement travel card for unlimited local travel; Create safe cycling routes, manage their experiential system and stimulate bicycle rentals; Create network of safe and attractive walking routes; Ensure availability of routes suitable for the physically impaired or elderly visitors in line with accessible tourism principles. 	Region	Resident and visitor satisfaction ratings, from online surveys. Public transport usage/ticket sales.

⁵⁸ See also training opportunities at <https://www.travelwithoutplastic.com>, <https://portals.iucn.org/library/efiles/documents/2012-013.pdf>

Strengthened links with local producers	<ul style="list-style-type: none"> See Priority 5 below. 		
Carbon-neutral destination – targets and related measures	<ul style="list-style-type: none"> Commission expert analysis of implications and preparation of action plan; Introduction of Rhodes environmental policy and certification requiring increased awareness and training of tourism businesses. 	Region	Carbon statistics

Strategic Priority 4: Managing Visitors in the City

Maximising visitors' enjoyment and residents' quality of life.

Action Area	Actions	Suggested Lead	Performance measures
Enhanced access for visitors	<ul style="list-style-type: none"> Improved public transportation – see Priority 2 above; Provide and promote park and ride/walk suitable for visitors; Increase 'Pedestrian Only' streets in key areas Create drop-off zones for coaches in suitable places. 	Region	Visitor satisfaction ratings, from online surveys
Visitor flow management	<ul style="list-style-type: none"> Plan and implement walking trails around city, with interpretation displays, pedestrian signage etc.; Undertake a comprehensive review of Rhode's signage with 2 key objectives: ensuring correctness of existing tourism and directional signage, removal of illegal and misleading signage. The review must also consider the visitor experience from the airport to different locations; Develop clear directional signage to key locations and visitor attractions throughout the island; Develop tastefully designed, environmentally coherent signage to identify and interpret key visitor attractions, trails and facilities. 	Municipality	Volume and pattern of visitors flows, from New tech apps.
Improved access to walk along the Old Town wall	<ul style="list-style-type: none"> Negotiate with the department of the Ministry of Culture that is responsible for managing access to the Old Town Wall. 	Municipality	Number and satisfaction of wall users
Attracting visitors to surrounding areas and islands	<ul style="list-style-type: none"> Develop events outside of Medieval City (e.g. arts, music, food festivals et al); Develop and promote visitor attractions and facilities in less visited parts of the city and in its surroundings; Produce city guides and books highlighting hidden treasures; Work with local tour operators and sea transport operators to attract visitors from Rhodes to the islands. 	DMO	Ticket sales of all relevant providers

Strategic Priority 5: Extending the Footprint

Spreading tourism's benefits to businesses and communities across the island.

Action Area	Actions	Suggested Lead	Performance measures
Engaging and supporting the communities	<ul style="list-style-type: none"> Identify and collaborate with local reps/managers in towns and villages, in partnership with Mayor; Develop a series of new evening activities (e.g. from boat safaris and 'dark skies' tours to cultural evenings and communal dinners) to promote the engagement of residents and visitors; Integrate visitor facilities within local festivities and activities; Create and promote local city ambassadors – e.g. cooperation with the arts sector's key figures to ensure the connection between arts and tourism; Promote art and culture initiatives such as street art to provide fresh perspectives on the city and expand visitation to new areas; Develop a community campaign to increase awareness of tourism, so that all members of the community better understand the benefits and opportunities associated with appropriate destination management planning; Develop an educational / cultural centre with activities related both to visitors and local communities; Online platform with info for young people who wish to engage with the tourism industry. 	DMO	Resident attitudes and satisfaction ratings, from online surveys. Visitor satisfaction ratings, from online surveys
Creation of Rhodes Signature Routes	<ul style="list-style-type: none"> Implement seven 'Rhodes Routes' as proposed in Section 6.7 – one per year for seven years Prioritise and enhance key products and experiences in local communities along routes, as proposed in Annex 4 – working in collaboration with local 'champions' Identify current facilities and gaps along routes (e.g. places to stay, eat et al) Offer combined discounts for new itineraries and attractions Position the Routes as a core element of the marketing campaign. 	DMO	Signature Routes created Usage indicators. Target markets' satisfaction ratings, from online surveys
Activity development	<ul style="list-style-type: none"> Embark on long term programme of activity development, as set out in Strategic Priority 1 		Usage indicators.

	<ul style="list-style-type: none"> • Prepare and implement development plans for key activities for target markets – i.e. <ol style="list-style-type: none"> 1. Water sports - both motor and wind related (i.e. windsurfing) 2. Cycling and mountain biking 3. Hiking (on trails) 4. Rock climbing 		Target markets' satisfaction ratings, from online surveys
Supporting MSMEs – business development skills	<ul style="list-style-type: none"> • Digital education/maximising social media; • Improve market access; • Improve access to capital; • Conduct an analysis of supply-demand potential of the local communities and promote their integration in the tourism value chain. 	Chamber	Tourism businesses' attitudes and satisfaction ratings, from online surveys.
Strengthened local supply chains (especially for food, wine, crafts and souvenirs)	<ul style="list-style-type: none"> • Facilitate strengthened links between local producers and tourism operators; • Initiate quality assurance system for hotels and restaurants promoting local products and recipes; • Create off-peak season events promoting local food experiences for visitors and networking between tourism businesses and local producers; • Improve links between producers and retail outlets (e.g. airport). 	Chamber	Tourism businesses' attitudes and satisfaction ratings, from online surveys.

Strategic Priority 6: Enhancing the Visitor Experience

Focusing on quality.

Action Area	Actions	Suggested Lead	Performance measures
Point of arrival welcome and information	<ul style="list-style-type: none"> • Provide simple map/guide and promote best available destination apps at points of arrival: <ul style="list-style-type: none"> - Leverage Wi-Fi network and use of smart technology to greet visitors as they arrive; - Investigate opportunities to improve the visitor experience and amenities at transport pick-up points, such as taxi waiting areas and bus parking bays; - Provide greet services at the seaport for large cruise ship arrivals. • Develop airport arrival signage and artworks to convey 'sense of place' on arrival; • Equip public transportation and municipal information centres with up to date information material - Utilise a variety of channels e.g. maps, stickers, audio, digital video screens on transport vehicles, advertising digital information, etc. 	DMO	Visitor awareness, attitudes and satisfaction ratings, from online surveys
Enhanced access to Rhodes' cultural and natural heritage and character	<ul style="list-style-type: none"> • Prepare an Interpretation Plan to tell the story of Rhodes Old Town, using multiple media and multilingual tourism information resources, including the concept of Colossus; • Bring the public realm to life (e.g. plaques on buildings, sculptures that tell stories, animators on the streets at peak times) – creating a 'sense of place'; • Create Signature Routes around the city and the island (see Strategic Priority 5, above); • Adopt best-in-class conservation and interpretation of the archaeological sites and other cultural features; • Promote the use of qualified guides; • Dedicated website for natural heritage sites; • Tell the story of the Valley of Butterflies and of Seven Sources; • Ensure Best-in-class conservation and interpretation of the sites. 	DMO	Visitor awareness, attitudes and satisfaction ratings, from online surveys

Quality assurance	<ul style="list-style-type: none"> • Quality assurance programme / quality label for key tourism businesses, e.g. accommodation, visitor attractions, restaurants, tour providers that meet certain standards (including quality measures, local knowledge, cultural concierge, green practices) • Ensure quality of cultural/natural heritage and attractions 	DMO	Percentage of registered business per year across the island
Enhanced access to destination information	<ul style="list-style-type: none"> • Printed guides/leaflets; • Maps; • Website and social media of businesses; • Mobile apps; • Identify ways to engage with local people to share their stories, pictures, videos and experiences (content) that build stronger customer relationships and connections with the different areas of Rhodes. 	DMO	Visitor awareness, attitudes and satisfaction ratings, from online surveys
Events to enhance interaction between visitors and local communities	<ul style="list-style-type: none"> • Market existing events differently: review current events for quality of experience; develop upgrade/enhancement plans; market events through social media and improved website; • Creation of new events in sites that can enable further interaction (e.g. Marina of Mandraki). 	Community groups	Visitor and resident awareness, attitudes and satisfaction ratings, from online surveys

Crisis Preparedness/ Civil Protection

Action Area	Actions	Suggested Lead	Performance measures
Legal framework for crisis response	<ul style="list-style-type: none"> Review and, if necessary, update health and safety requirements to protect visitors and tourism personnel consistent with national legal requirements (e.g. liability, duties of employers/employees, provision of adequate facilities, adequate training for staff) Advise tourism businesses on the development of appropriate plans and Standard Operating Procedures (plans) for their facilities to address (e.g. evacuation, building fire/collapse, external emergencies) 	Municipality	Percentage of tourism businesses fully informed
Operational framework for emergency response	<ul style="list-style-type: none"> Review and, if necessary, update 'first responder' protocols, identify key risk areas, and allocate responsibilities-, so team can act as soon as crisis hits or threatens Provide tourism crisis and risk management resources online (e.g. UNWTO Toolbox for communications and resources) Develop training programme with responsibilities & timetable Specify frequency of 'live' scenario exercises and skills refreshment Explore exchange of best practice, incl. visits to other crisis management centres (e.g. Caribbean: hurricane; Iceland: volcanic et al) 	As above	Downloads of resources. Take up of online training. Number of 'live' scenario exercises per year
Crisis management plan	<ul style="list-style-type: none"> Develop crisis management and communications plan with responsibilities & timetable Specify frequency of 'live' scenario exercises and skills refreshment Explore exchange of best practice, incl. visits to destinations recognised as crisis management and communications exemplars 	As above	Number of coordination meetings per year. Number of 'live' scenario exercises per year.
Crisis recovery plan	<ul style="list-style-type: none"> Identify those responsible for key elements of crisis recovery – as part of crisis management plan - e.g. those who will assist with recovery funding applications for communications and marketing campaigns Establish public/private Tourism Crisis Action Group Explore exchange of best practice, incl. visits to destinations recognised as crisis management and communications exemplars 	Municipality of Rhodes	Number of coordination meetings per year

Enabling/ Supporting Actions (Cross-Cutting)

Action Area	Actions	Suggested Lead	Performance measures
Industry education and training - food and drink, customer service, online marketing and information provision	<ul style="list-style-type: none"> • Ensure industry access to quality information about the island and practical information about traffic restrictions, parking facilities, taxi charges, bus stations, etc. <ul style="list-style-type: none"> - Conduct a training needs analysis and a training support programme (listings platform, cultural concierge programme, customer service, etc.) • Set up a tourism skills group, charged with developing and overseeing the strategic implementation of a Tourism Skills Plan. • Identify and respond to internal skill and resource capacity gap among local businesses, specifically relating to: <ul style="list-style-type: none"> - Ongoing content development - Digital Marketing Comms (e.g. social media skills/best practices workshops) - Product/experience packaging (e.g. cooperative bookable product packages capitalise on new product opportunities.) - Partner/operator liaison (e.g. third-party distribution systems) • Develop a tourism e-marketing kit based to help local businesses attract visitors through information and communication technology. • Electronic portal with education courses, toolbox and standards to support quality control as well as with local best practices (e.g. digital marketing, customer service, accommodation development/motel refurbishment, business activation/growth, event management, and environmental management) 	Chamber and DMO	Success rates of training programs. Downloads of resources.
Research and intelligence	<ul style="list-style-type: none"> • Visitor satisfaction survey • Hotel and other accommodation services' ratings • Industry and local stakeholders state of play barometer <ul style="list-style-type: none"> - Perceptions of visitor trends, business performance, national tourism policy and destination management issues at local level • Resident satisfaction survey • Events performance / visitor satisfaction survey • Baseline tourism demand data analysis - annual 	DMO	Usage of online R&I resources

	<ul style="list-style-type: none"> Competitor positioning analysis, international market intelligence and DMPs for market segments Trendspotting on destination marketing and management Review of best practices on various areas (e.g. traffic free centres / cruise tourism management / heritage interpretation / green investments / environmental management and use of renewable energies to reduce costs/emissions) Economic impact assessment of tourism activity Destination marketing activity assessment Evaluation of Rhodes's online footprint among OTAs, review platforms, etc Develop a user-friendly Tourism Research Report that presents an evaluation of visitation annual data and other relevant data. 		
ICT systems and applications	<ul style="list-style-type: none"> Creation of a digital platform for communication with tourism businesses and to enable them to access information on a wide variety of subjects relevant to running their businesses; engage in online training; sign up for services of all kinds, especially marketing; apply for relevant licenses, etc; provide consultation feedback on policy issues; exchange knowledge and form partnerships. Advance the use of big data and new technologies to monitor and evaluate tourism performance and impact 	DMO	N.A.
Partnership facilitation	<ul style="list-style-type: none"> Develop a Destination Specialist Program; online training resource dedicated to Travel Trade Professionals Encourage collaboration between stakeholders Establish alliances with industry marketing partners and potential sponsors 	DMO	<p>Number of businesses supporting the program</p> <p>Number of registrants/graduates</p>
Performance measurement /management	<ul style="list-style-type: none"> Monitor key indicators such as seasonal fluctuations in demand, arrivals and expenditures, patterns of visitation to attractions, visitor segments, etc. Establish and maintain DMP Scorecard for KPIs relating to selected performance measures noted in this Action Plan Undertake regular surveys to provide sustainability success measures (see Section 6.9) 	DMO	Quarter/semester/annual updates
Effective law enforcement	<ul style="list-style-type: none"> Introduce special team of enforcement in order to reduce customer fraud, unwanted behaviour, noise, etc. Communicate with businesses, the tourism workforce and residents about the role of the special team 	To be decided	To be decided

ANNEX 2

MARKETING PLAN RHODES

Annex 2: Marketing Action Plan

Strategic Focus

This 5-year marketing plan is designed to attract the type of tourism that will underpin a sustainable tourism economy in Rhodes, as defined in the DMP. It targets a limited number of market segments. These are prioritised as primary and secondary, according to their propensity to deliver against the objectives outlined in the DMP. These segments are defined in Section 6.3 Target Markets in the DMP.

Guiding Principles

In preparing this plan, the following critical issues have been taken into account:

- **Sustainability:** The focus is 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 activities is proposed, 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 Rhodes, targeting those who will deliver most benefits with least negative impact, particularly those more likely to stay longer, spend more, return, and visit outside the main season.
- **Product-market fit:** Marketing investment should also focus on those who would most appreciate Rhodes' range of appeals, particularly where they offer an opportunity to contribute more to Rhodes' economy and travel throughout the year and thereby grow the overall market for Rhodes.

Key Points

- Rhodes should **work with GNT0** to maximise brand-compliant coverage of Rhodes in GNT0 marketing communications. This will enable Rhodes to achieve significantly more distribution of its message than it could achieve on its own, at a fraction of the cost.
- Some activities are split between **development** in years 1-2 (i.e. persuading airlines to fly in the off-season and developing off-season packages) and **promoting** these routes in years 2-5 (assuming at least one off-season direct flight has been secured in year 1 to start flying in year 2).
- The majority of activities are **human resource-intensive**, rather than high cost.

- An attractively designed, brand-compliant, informative, practical, easily navigable **website** with links to tourism businesses is a priority. This will underpin all marketing activity and transcend all segments.

Campaign costs are flexible according to budget. These would need to be decided when the LIB/DMO is in place and has funds to deploy.

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 1: "Develop and Build" Off-Season (Years 1-2: development; years 2-5 marketing)	Extend the season	"Culturally Curious"	<ul style="list-style-type: none"> Built heritage Cultural heritage (tangible and intangible) 	<u>Primary</u> <ul style="list-style-type: none"> UK Germany 	<u>Years 1-2:</u> <ul style="list-style-type: none"> Persuade 2 airlines (1 UK, 1 Germany) to extend direct flights into the shoulder/off season. Introduction of appropriate tour activities by officially certified operators with a focus on nature, heritage, culture and food experiences. 	<u>Years 1-2:</u> <ul style="list-style-type: none"> 2 direct air services extended by 2 months ea. (1 from UK & 1 from Germany). Number of reservations, reviews, number of trails. 	<u>Years 1-2:</u> <ul style="list-style-type: none"> N/A (human resource only)
					<u>Years 2-5:</u> <ul style="list-style-type: none"> Develop 2 off-season packages (1 in UK, 1 in Germany) Achieve optimum and appropriate coverage of Rhodes in GNT0 marketing communications. 	<u>Years 2-5:</u> <ul style="list-style-type: none"> 2 off-season packages (1 UK, 1 Germany) Optimal, appropriate and brand-compliant coverage of Rhodes in GNT0 marketing communications. 	<u>Years 2-5:</u> <ul style="list-style-type: none"> N/A (human resource only) N/A (human resource only)

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 1: "Develop and Build" (cont.)		"Culturally Curious" (cont.)			<ul style="list-style-type: none"> Ensure GNT0 marketing (website, campaigns, brochures et al) reflect Rhodes brand values & narratives. 	<ul style="list-style-type: none"> Optimal, appropriate and brand-compliant coverage of Rhodes in GNT0 marketing communications 	<ul style="list-style-type: none"> N/A (human resource only)
					<ul style="list-style-type: none"> Engage PR agency to develop campaign to target key publications, influencers, bloggers etc., particularly for major events. 	<ul style="list-style-type: none"> Improvement in the positioning, awareness, engagement and conversion of Rhodes in primary and secondary markets. 	<ul style="list-style-type: none"> Euros 40,000 p. a. market (to cover all PR activity in key markets for all target segments – i.e. 'culturally curious', 'outdoor enthusiasts' et al)
					<ul style="list-style-type: none"> Social media campaigns in English and German targeting UK and German markets. 	<ul style="list-style-type: none"> 4 social media campaigns (2 p.a. p. country (UK, Germany), featuring different brand narrative themes. Level of engagement Click-through to tourism operators/bookings 	<ul style="list-style-type: none"> Euros 20,000 p.a.
					<ul style="list-style-type: none"> Host press/blogger/ influencer visits to Rhodes 	<ul style="list-style-type: none"> 10 press/ Bloggers / influencers p.a. 10 positive media features 	<ul style="list-style-type: none"> N/A (human resource only - hosting by Rhodes tourism businesses)

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 1: "Develop and Build" (cont.)		"Outdoor enthusiasts"	<ul style="list-style-type: none"> Hiking Cycling Rock-climbing 	Primary <ul style="list-style-type: none"> UK Germany 	Years 1-2		
					<ul style="list-style-type: none"> As for "Culturally Curious" above (development phase) 		
					Years 2-6		
					<ul style="list-style-type: none"> Liaise with GNT0 to achieve optimum and appropriate coverage of Rhodes in GNT0 marketing communications. Ensure GNT0 marketing (website, campaigns, brochures et al) reflect Rhodes brand values & narratives. 	<ul style="list-style-type: none"> Optimal, appropriate and brand-compliant coverage of Rhodes in GNT0 marketing communications 	<ul style="list-style-type: none"> N/A (human resource only)
					<ul style="list-style-type: none"> Social media campaigns in English and German targeting UK and German markets. 	<ul style="list-style-type: none"> 4 social media campaigns in English and German (2 p.a. p. country (UK, Germany), featuring different brand narrative themes. Level of engagement Click-through to tourism operators/ bookings 	<ul style="list-style-type: none"> Euros 20,000 p.a.
					<ul style="list-style-type: none"> Host press/blogger/ influencer visits to Rhodes 	<ul style="list-style-type: none"> 6 press/ bloggers/ influencers p.a. 6 positive media features 	<ul style="list-style-type: none"> N/A (human resource only - hosting by Rhodes tourism businesses)
					<ul style="list-style-type: none"> Engage PR agency to develop campaign to target key publications, influencers, bloggers etc., particularly for major events. 	<ul style="list-style-type: none"> Improvement in the positioning, awareness, engagement and conversion of Rhodes 	<ul style="list-style-type: none"> Included in PR agency costs per market above (i.e. 'culturally

						in primary and secondary markets.	curious', 'outdoor enthusiasts' et al).
					<ul style="list-style-type: none"> Product representation in appropriately targeted and cost-effective niche domestic or international travel trade fairs. (e.g. https://www.fibega.org/, https://www.tourismexpo.ru/, https://www.anuga.com/ and https://www.tournatur.com/, https://www.adventureshow.com/) 	<ul style="list-style-type: none"> Number of trade fairs attended, valuable contacts made. Inclusion of Rhodes in tour operators' programs, amount of business resulting from fairs. Trade-readiness, development and ongoing trade engagement. 	<ul style="list-style-type: none"> Dep on number of fairs attended.
					<ul style="list-style-type: none"> Develop series of short (1 min.) videos for online use based on the identified concept. Use ambassadors reflective of target market profile. 	<ul style="list-style-type: none"> Level of engagement, number of video views and popularity. Number of ambassadors contracted. 	<ul style="list-style-type: none"> Euros 30,000
					<ul style="list-style-type: none"> Identify and deliver one catalyst project under each theme – e.g. a festival, conference, competition, project (cf. Red Bull cliff diving competition in Mostar or, previously, in Santorini). 	<ul style="list-style-type: none"> Number of participants and popularity. 	
					<ul style="list-style-type: none"> Adventure Travel Trade Association (ATTA) Membership and participation in appropriate ATTA events. 	<ul style="list-style-type: none"> Active membership – number and quality of events participated in. 	<ul style="list-style-type: none"> c. Euros 1,500 (membership)

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 1: "Develop and Build" (cont.)		"Off-Season Short breakers"	<ul style="list-style-type: none"> Relaxation Gastronomy Culture 	<u>Primary</u> <ul style="list-style-type: none"> UK Germany 	Years 1-2		
					<ul style="list-style-type: none"> As for "Culturally Curious" above (development phase) 		
					Years 2-6		
					<ul style="list-style-type: none"> Liaise with GNT0 to achieve optimum and appropriate coverage of Rhodes in GNT0 marketing communications. Ensure GNT0 marketing (website, campaigns, brochures et al) reflect Rhodes brand values & narratives. 	<ul style="list-style-type: none"> Optimal, appropriate and brand-compliant coverage of Rhodes in GNT0 marketing communications. 	<ul style="list-style-type: none"> N/A (human resource only)
					<ul style="list-style-type: none"> Host press/blogger/ influencer visits to Rhodes. 	<ul style="list-style-type: none"> Press/ blogger/ influencer visits and positive features included in "Culturally Curious" KPIs above. 	<ul style="list-style-type: none"> N/A (human resource only - hosting by Rhodes tourism businesses)

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 1: "Develop and Build" (cont.)		"Off-Season Short-Breakers"		<u>Secondary</u> <ul style="list-style-type: none"> Sweden Poland Israel Russia 	<u>Years 2-6</u>		
		"Special Interest Devotees"	<ul style="list-style-type: none"> Classes, retreats and group activities (e.g. yoga, painting, language learning etc.) 	<u>Secondary</u> <ul style="list-style-type: none"> UK Germany 	<ul style="list-style-type: none"> Liaise with GNT0 to achieve optimum and appropriate coverage of Rhodes in GNT0 marketing communications. Ensure GNT0 marketing (website, campaigns, brochures et al) reflect Rhodes brand values & narratives. As for "Off-Season Short-Breakers" above: brand-compliant coverage in GNT0 marketing communications. 	<ul style="list-style-type: none"> Optimal, appropriate and brand-compliant coverage of Rhodes in GNT0 marketing communications Optimal, appropriate and brand-compliant coverage of Rhodes in GNT0 marketing communications 	<ul style="list-style-type: none"> N/A (human resource only) N/A (human resource only)
		"MICE"	<ul style="list-style-type: none"> Conferences and incentives 	<ul style="list-style-type: none"> UK Germany Sweden 	<ul style="list-style-type: none"> Participation in GNT0 MICE-targeted activities Attend appropriate MICE trade fairs in key target markets (e.g. IBTM https://www.ibtmworld.com/). 	<ul style="list-style-type: none"> No. of conferences and incentive trips secured for Rhodes (no. of conferences /incentives x no. of delegates x spend). 	<ul style="list-style-type: none"> Dependent on GNT0 opportunity and MICE fairs attended.

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 2: "Maximise Value" (Years 1-5 ongoing)	Maximise main season visitor value	"Culturally Curious"	<ul style="list-style-type: none"> Built heritage Cultural heritage (tangible and intangible) 	Primary <ul style="list-style-type: none"> UK Germany 	Most tactics are in-destination – targeting visitors post-arrival, plus website: <ul style="list-style-type: none"> Develop website with links to tourism businesses (See under 'General' below) Develop 'In-Rhodes' app w restaurant, attractions and sightseeing information and offers. Develop local in-destination campaigns to promote spending beyond hotels, focusing on Rhodes gastronomy, culture and activities. Together with food and wine specialists, develop trails focusing on agro-tourism and the local food and beverage industry. 	<ul style="list-style-type: none"> 15% increase in main season visitor expenditure p.a. 1 Rhodes tourism-focused website (See under 'General' below). App development and usage: engagement, purchases via links. 1 campaign. Number of trails, participating establishments, demand from visitors. 	<ul style="list-style-type: none"> Included under 'General' below Euros 20,000 development (year 1) + c. Euros 5,000 ongoing development & maintenance p.a. Euros 25,000 p.a.

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
Priority 3 "Maintain and Nurture" (Years 1-5 ongoing)	<ul style="list-style-type: none"> Maximise main season visitor value Manage visitor flows 	"Sun and sea/beach worshippers"	<ul style="list-style-type: none"> Beach – sun, sea, sand 	<ul style="list-style-type: none"> UK Germany Sweden Poland Israel 	<ul style="list-style-type: none"> Included in tactics for "Culturally Curious" above 	<ul style="list-style-type: none"> Included in KPIs for "Culturally Curious" above 	<ul style="list-style-type: none"> Included in budget for "Culturally Curious" above
		"Cruise visitors"	<ul style="list-style-type: none"> Excursions 	<ul style="list-style-type: none"> Europe, USA 	<ul style="list-style-type: none"> Work with cruise lines to increase value of shore excursions. Work with cruise lines & municipality to improve visitor flows, reduce congestion at 'pinch points' and ease congestion ashore. Attend Seatrade cruise trade fair https://www.seatradecruiseglobal.com/ to optimise number and type/capacity of cruise ships coming to Rhodes and to ensure optimum usage of shore excursions and other cruise-related revenue-generating activities. 	<ul style="list-style-type: none"> Increased revenue from onshore spending for excursion operators, attractions, retailers et al. Cruise pax satisfaction – via survey. Residents' satisfaction – via survey. Optimal no. of cruise ships p.a., type and capacity. Revenue optimisation from shore excursions and shore-based passenger spend. 	<ul style="list-style-type: none"> N/A (human resource only)

General Marketing Tactics

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/Budget (Euros) est.
General Basic, but essential, activities, which addresses all objectives and provides themed, practical information for all market segments	<ul style="list-style-type: none"> • Extend season • Maximise visitor value • Manage visitor flows 	All segments	<ul style="list-style-type: none"> • All themes/ • brand narratives 	<ul style="list-style-type: none"> • All markets 	<ul style="list-style-type: none"> • Develop website in 2 languages (English, German), covering key elements of Rhodes, which reflects Rhodes' brand narratives, with links to businesses for booking. Develop a blog in the website. • Consider expanding in years 2-3 to include Polish and Hebrew, depending on economic conditions and visitor patterns from Poland and Israel. • Enhance and improve indirect air connections, in order to open markets of interest that still do not generate sufficient air demand to support a direct service. • Develop, implement and maintain an online trip-planning tool, with an events calendar, which allows visitors to search for and book experiences by date, activity, tourism setting, natural region and proximity to entry points and communities in the region. • Build image and video library to reflect brand narratives and make available to tour operators, travel journalists, bloggers, influencers et al. 	<ul style="list-style-type: none"> • Attractively designed, brand-compliant, informative, practical, easily navigable website, in appropriate languages, with links to tourism businesses. • New air services in place and number of visitors from new markets. • Number of app users, level of engagement, bookings. • Quality and range of material available, number of requests and usage in positive media 	<ul style="list-style-type: none"> • Euros 25,000 development (year 1) + c. Euros 10,000 ongoing development & maintenance p.a.

					<ul style="list-style-type: none"> • Encourage the industry to increase distribution channels and 'bookability' through packaging and bundling, to achieve greater market penetration for Rhodes products/experiences. • Identify and engage with popular OTAs for each segment and targeted market (e.g. Viruoso and Zicasso for luxury travellers; Viator, Get Your Guide and Expedia for different types of tours and experiences). • Continue investment in web development, SEO and other appropriate technological tactics, platforms and channels. • Develop awareness campaign for visitors to reduce their environmental impact, raising awareness of sustainability issues. • Produce travel-trade manuals • Become a member of WYSE Travel Confederation 	<p>environment by third-parties.</p> <ul style="list-style-type: none"> • Partnerships between different sectors, and bookings. • Online booking, packages sold. ratings of online listings • Visits, web ranking, functionality, level of engagement, response time. • Reduced waste, water consumption • Increased local businesses and residents' satisfaction. • Number of copies disseminated online and through travel trade events. 	
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ANNEX 3

VISITOR EXPERIENCE AND PRODUCT DEVELOPMENT FRAMEWORK

Annex 3: Visitor Experience and Product Development Framework

A. Rhodes Signature Routes – Recommended actions

This section sets out actions recommended for the creation of the Signature Routes set out in Section 6.7 of the DMP.

A. The Best of Rhodes' Wine and Food: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
A1.1	Meet with leading wine producers to review Wine Festival currently held in second half of September (annually? or not consistent?) Examine possibility to move later in the year – October?	Short-term
A1.2	Meet with leading wine producers to examine current wine tasting experiences – frequencies, time of year, ability to extend later and throughout the year. Look at collaboration with boutique and leading hotels, to develop year-round packages.	Short-term
A1.3	Support leading wine producers to consider route planning, joint marketing for wine-tasting route.	Medium-term
A1.4	Identify and develop potential culinary experiences with leading chefs, and potential traditional 'home cook' experiences.	Short-term
A1.5	Meet with key olive growers to ascertain interest in developing olive harvesting experiences in October/November.	Short-term
A1.6	Meet with Aegean Cuisine, and select certified restaurants, to arrange cooperation with vineyards for post-wine testing meals, and other event coordination.	Short-term

B. Magical Monolithos: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
B1.1	Develop stories around a) Monolithos Castle; b) Special Orchid varieties and other unique flora/fauna; c) particular grapes varieties and growing methods in valley of Kymissala; d) other stories?	Short to Medium-term
B1.2	Expand specialised outdoor events – trail runs, mountain biking, hiking. A few currently offered, but add more to the annual calendar in coordination with international partners.	Medium-term
B1.3	Support Monolithos community organisers to develop special events during Christmas and New Year period	Medium-term

B1.4	Expand outreach to specialised international retreat organisers/operators – wellness, education, language, art, writing, etc.	Medium-term
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C. Rhodes Outdoor Expeditions: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
C1.1	Support ongoing efforts to have Rhodes included in the E4 Long Distance Hiking Path as soon as possible. Begin efforts to market the E4 to established European hiking operators and organisations, to promote winter/off-season hikes through Rhodes. Identify accommodation providers along the proposed route, to arrange lodging options for hiking groups, including logistics/transport of baggage, etc.	Short-term
C1.2	Work with local rock-climbing operators to create an international climbing event during the off-season – e.g. November? March?	Medium-term
C1.3	Work with Rhodes' Gadoura dam authorities to allow non-motorised water sports and activities on the dam (as for Apolakkia).	Medium-term

D. Rhodes Old Town: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
D1.1	Within the Old Town, examine opportunities to improve signage and interpretation for independent visitors walking through. Consider posted information on key sights throughout Old Town, and a system of maps along routes explaining landmarks.	Short-term
D1.2	Engage with local businesses (restaurants, cafes, shops) in the Old Town to discuss requirements to expand in to off-season, opportunities to collaborate and coordinate with promotions to visitors.	Short-term
D1.3	Consider visitor experience training, to improve tourist experience when walking through the Old City. (e.g. Problems with restaurant staff 'hassling' tourists to enter for a meal; presence of touts and beggars along old city streets, etc.)	Medium-term
D1.4	Consider improvements to interpretation and signposted information within Palace of the Grand Master, archaeological museum, churches, etc. for independent visitors. Consider audio equipment for storytelling at numbered locations within the landmarks, to capture the history and stories of the Old Town.	Medium-term

E. Rhodes Family Fun Days: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
E1.1	Conduct product/experience review of the Rhodes Aquarium, to identify resource needs for upgrading and improvement.	Medium-term
E1.2	Meet with key experience providers (eg. Faliraki Waterpark, Kart Racing, mountain biking, etc.) to explore their requirements to extend opening times through off-season as well.	Short-term
E1.3	Identify current cooking experiences, (like The Little Greek Kitchen) and discuss extending the offer year-round, and encourage upgrade offering as required. Identify restaurants and chefs who can introduce traditional cooking experiences as part of family itineraries.	Short-term
E1.4	Identify existing and develop new traditional ceramics making experience in Rhodes and Archangelos. There are a number, but with mixed reviews, that require support to upgrade their offering.	Short-term

F. Archaeology Adventure: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
F1.1	Conduct and audit of Rhodes' leading archaeological sites, to determine status for tourist visits, interpretation, signage, access. Based on 'readiness' of each site, develop specific itineraries for 1, 2, 3-day tours around the island, incorporating key sites.	Short-term
F1.2	Develop stories to help promote Rhodes' rich archaeological history, to use for marketing in the off-season	Short-term
F1.3	Collaborate with Univ of Aegean programme that is developing walking paths through forest and archaeological sites of Kymissala, to support tourism aspects, possible guiding needs, marketing & promotion (market access) in preparation for 2020 opening to visitors.	Short-term
F1.4	Work with the organisers of the Medieval Rose Festival, to explore adding additional, shorter events during the off-season in Rhodes, Lindos, and other potential destinations around the island.	Medium-term
F1.5	Examine potential for other festivals or special events at select archaeological sites during the off-season.	Long-term
F1.6	Work with authorities to make necessary improvements to Profitis Ilias Monastery at summit. Presents good hiking opportunities around the area in the off-season, but requires maintenance (path, steps, better interpretation, etc.)	Medium to Long-Term

G. Reset and Recharge in Rhodes: Products and Experiences to be enhanced and developed across Rhodes

	Actions	Timeframe
G1.1	Audit existing wellness, educational and creative retreats held in Rhodes. Determine potential for expansion in to off-season and what resources/marketing/outreach support will be required.	Short-term
G1.2	Identify tour operators that specialise in wellness, education and creative retreats globally, and determine requirements for offering experiences in Rhodes during the off-season.	Medium-term

H. Other Products and Experiences to be enhanced and developed across Rhodes:

	Actions	Timeframe
H1.1	Examine the potential of enhancing the Medieval Rose Festival. Opportunities for smaller-related events during off-season?	Short-term
H1.2	Numerous windmills across Rhodes, in various states of disrepair. Examine potential for use, history/story development?	Long-term
H1.3	Develop programme to support small/medium tourism enterprises improve their use of social media for marketing, and direct market access through online channels.	Short to Medium-term
H1.4	Identify supporters for Phaethon Association – Rhodian Ponies. Potential for further activities focused on families and outdoor enthusiasts. Requires greater resourcing and technical assistance to upgrade experiences.	Short to Medium-term

B. Rhodes Product and Experience Resources

The following table identifies existing resources that offer the potential for creation or enhancement of exceptional visitor experiences.

P – Primary S – Secondary E – Emerging

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
Anastasia Triantafyllou Vineyard	E	S	S	P	S	S	S	Family run – 23 yrs. Offers tasting, shop and restaurant. Heavily dependent on annual arrangements with Tour Operators. Tour bus bookings unstable year on year. Currently only operate restaurant 1x week with confirmed large groups.	Exhibit products of local producers. Opportunities for better collaboration with 'route partners'. Need to engage in direct marketing through social media, to reach FITs better. Opportunity to run restaurant daily, with FITs and reduce dependence on large groups.
CAIR Winery	E	S	S	P	S	S	S		Potential for wine/gastronomy route and annual events/festivals.
Alexandris Winery	E	S	S	P	S	S	S		Potential for wine/gastronomy route and annual events/festivals.
Emery Winery	E	S	S	P	S	S	S		Potential for wine/gastronomy route and annual events/festivals.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
Kounaki Winery	E	S	S	P	S	S	S		Potential for wine/gastronomy route and annual events/festivals.
Petaloudes - Butterfly Valley		P	S	S		P	P	Nature reserve – 2-3 hr experience, walking through valley. Mixed reviews – some positive, but increasing reports of limited/no butterfly sightings. Possible over-visiting at times.	Concerns over need to increase protection, and visitor awareness (quiet important!)
Bee Museum	E	P	S	S	S	P	P	Excellent experience and exhibits. Developed to highest international standards. 30,000 annual visitors. Strong social media presence, App. Work with operators and large group bookings, but also growing FITs.	Looking at adding interactive experiences: collecting honey from hives, processing, can turn in to several hour experience, pre-booked.
Rodia Soap Factory and Shop	E			E		E	E	Small family owned soap factory. Offers short courses pre-booked for soap making. Sells own products and other local producers.	Potential for expansion. Need support with social media use/online marketing presence for direct bookings.
Filerimos Monastery	E	P	P	S	S	S	S	15th C monastery built by Knights of St John, in very good condition with significant historical interpretation. Positive experience	Accessible and can be included in several route itineraries. For peak and off-season.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
								for tourists. Easy access from Rhodes City, and airport.	
Farma of Rhodes Petting Zoo	E	P	S	S		S	S	Variety of animals for interaction/feeding, petting, observing. Upgrading and adding new experiences – Lemur, Deer, Ostrich, Alpaca, mini Donkeys. #14 Rhode attraction on Trip Advisor.	Very active on social media; demonstrated increase in direct bookings in last few years. Needs to be better integrated as part of routes (eg. Family circuit, Outdoor enthusiasts) to further increase visits.
Ancient Kamiros	E	P	P	S	S	S	S	One of Rhodes three great ancient cities. Also small beach town, simple bathing area and restaurants, not as developed.	Approx 30 min south of Rhodes Airport. Can be combined with visits to Vineyards, Butterfly Valley, and other attractions along Western side of Rhodes.
Kritinia Castle	E	P	P	S	S	S	S	Ruins of Medieval Castle above village of Kritinia. Café nearby with positive impressions. June Medieval Festival organised by cultural association of local village.	Good to add in as part of route, for a brief stop.
Monolithos Village	E	P	P	S				Amphitheatrically built at base of Mt. Akramytis. Natura 2000 protected area. 2-3,000 visitors/day during high season – for sunset, castle, 'positive energy' reported. Capacity for 50 overnight guests in local hotels. Mainly self-drive FITs. Also, cyclers and mountain bikers – 2-3 nights.	Potential to extend in to winter months – fireplaces and 'cosy' winter environment. Potential to develop (more) Dec/Jan – Christmas and NY celebrations, events. Can be included for wine testing, archaeology, outdoor activities.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
									Also writing, art, wellness retreats. Recent activity started of horse-riding village to village, visitor luggage moved to meet them, etc.
Monolithos Castle	E	P	P	S				Located on 236-metre high rock, facing sea and Chalki. Built by Grand Master d' Aubusson in 1476, over the ruins of older Byzantine fortification. Two small churches inside castle. Popular with day visitors, exceptional sunsets.	Extend marketing to wedding market.
Monolithos Mountain Biking	E	P		S				Biking and hiking trails established and used, not in large numbers.	Improve marketing, use of social media to promote offerings.
Monolithos Trail Running - Akramytis	E	P		S				130 runners for Trail Run event, Feb 2019 (first in 2017). Video prepared, good social media materials	Good for extending into off-season.
Monolithos Bio-Wines	E	S	S	P				Nice locally produced wine, tasting experiences available.	Can be included in wine tours.
Ancient Kymissala	E	P	P	S				Very important archaeological site spanning 10 km2. Univ of Aegean developing a project, with S Aegean Region to include trails connecting archaeological places, for visitor to walk through forests, trace history of events. Paths being marked now,	Tremendous potential for archaeological/cultural route in Rhodes, and will be significant draw for visitors to Monolithos, when opened for managed trails and interpretation.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
								interpretation will be provided. Mapping should be complete and able for use in 2020. http://www.eulimene.eu/en/kymissala.php	
Monolithos Traditional Festival	E	P	P	S		S	S	Early July each year, to promote local products; dancing and music	Can be enhanced and promoted.
Alyki Beach		P				S	S	Picturesque beach in cove, shingled beach. Small and hidden, below Monolithos.	
Fourni Beach		P				S	S	Picturesque and sheltered beach. Caves, but not always accessible, depending on tide. Seal families occasionally visit; turtles laying eggs on beach certain times of year.	
Profitis Ilias (Hike)	E	P	S					Third highest mountain in Rhodes -- 798 m. Monastery at summit. Elafos and Elafina hotel, originally built for Italian army officers. Opposite hotel is villa built for Mussolini. Positive experience for hikers, but not very well known or visited. Reported to need maintenance of paths, steps. Needs better interpretation.	Potential as good experience for hikers, and culturally curious. Decaying buildings require attention. Remains hidden gem.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
Kattavia Village								Village with a few restaurants – mainly pass through on way to Prasonisi.	
Prasonisi Beach		P				P		Haven for windsurfing and kite surfing. Good family beach area, but need more facilities to grow beyond surfing community.	Local businesses seeking support from government: need port to allow for fishing/boating experiences; needs improved lighting on road from Kattavia to Prasonisi; need public toilet and showers (currently only provided by local restaurants/accommodations)
Prasonisi Windsurfing and Kitesurfing		P				P		Biggest windsurfing/kite surfing destination in Rhodes, very busy during the season. Several local experience/kit providers.	Need better public infrastructure – toilets, showers, etc.
Vroulia Archaeological Site, Prasonisi		P	E			P		Appears semi-excavated, with office/small ticket building at entrance? Locals say it is always closed, not currently accessible to tourists.	Potential as add-on local experience for Prasonisi area. Discussion needed with archaeological authorities responsible.
Gadoura Dam		E				E	E	Restricted use at present.	Potential for hiking, kayaking, canoeing, birdwatching, and other non-motorised water sports.
Lindos	E		P			P	P	Small picturesque village with two local beaches and Acropolis, an hour-drive from Rhodes. Well visited. Ample variety of accommodation. Seasonal. St Paul's Church	Some concerns around cleanliness near beaches, rubbish visible, etc. Very busy during peak season. June

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
								- popular wedding venue. Some cruise ships offer half day or full day excursions.	29th Festival of St Paul – can be enhanced and promoted to visitors.
Lindos Beaches		P				P	P	Beautiful, good restaurants and shopping. Reports of overcrowding during summer months.	Summer Paradise Festival – music, held July 13, 2019
Acropolis of Lindos	E		P			S	S	Well preserved and visited. Easy to access, some controversy over donkeys used to ride up.	Potential for off seasons visits, cooler and less crowded. Medieval Festival previously organised unclear if still held every year. Could be moved later in year?
Boat Trips, Sailing Cruises - Lindos						P	P	A variety on offer.	
Rhodian Pony – Phaethon Association	E	E				E	E	Began in 2001, to save small, wild Rhodian ponies. Basic infrastructure – stables, paddock area, kitchen and main hall; small gift shop not functional at present. Very few tourists visiting. Mainly hikers passing through at beginning/end of tourist season. Small local fair in late June w/ food, dancing, as fundraiser. Semi-active partnerships with US and UK universities.	In desperate need of financial support; Mayor has funded horse feed for last three years. Potential as experience – family visitors. Needs support, experience development, market outreach assistance. Governor created hiking routes that include pony visit, App for routes under development.
Archangelos	E			E		E	E	Medium sized-village (c. 6,000) with a number of visitor experiences (see below) A	Good potential to expand in to shoulder season, as not sun/sea dependent. Olives 'experiences'

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
								number of tourist-quality restaurants, local shops, cafes. Has been used as filming location.	possible between Nov-March. Potential for cultural events – dancing, singing, food, currently catering to Greek tourists, but could be developed for international visitors.
Archangelos Old Olive Factory	E		P	E		S	S	Private enterprise, approx. 500 daily visitors in peak season. Olive oil, soap, other natural products. Showcases antiquities, 2C. - 7C. stones/artefacts; farming machinery, etc.	Potential and interest in developing a ceramics/traditional pottery 'museum' and experience.
Archangelos Folklore Museum	E		P	E		S	S	Private enterprise – same owner as olive factory. Less visited – requires advance appointment to open/visit. Mainly for groups. EUR 2/person	Tour operators request payments to add experience to tours.
Tsompika Monastery	E		P	E		S	S	Between Kolymia and Archangelos, 25 km south of Rhodes. Byzantine church, built on top of hill – 300+ steps to reach, not easily accessible by all. Legend that a visit helps women with fertility issues. There is 'Pano' = up, top church, and 'Kato' = down, lower church closer to Archangelos, with small museum of relics, and accommodations for pilgrims, managed by Church.	UK developer building apartments nearby – presumably for UK residents/off-season living.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
Stegna Beach						P		Some water sports available – paddleboarding, small boat rental, fishing. Near small fishing port. Up hill is small Church of Adonis.	Reported stories related to historical visits from pirates. Family water and land-based experience could be developed around this.
Afandou Golf Course	E			E		E		In poor condition, and in need of investment. Not clear if current investor is interested in continuing; some suggestions that they are looking for other investors or to sell it.	Good potential for extending the visitor season, with proper investment and maintenance.
Afandou Beach						P		Not as frequently visited by tourists – pebble beach, not sand. Beach chairs to rent, small restaurants. No water sports, not 'commercial' feeling. From 'Afandos', hidden from the sea, reportedly tucked away as protection from pirates.	Examine potential for two festivals to extend season: St Luka Festival mid October. St George Festival late April.
Springs of Kalithea				E		P		Popular sun and sand, romantic destination. 'Relaunched' after reconstruction, and quickly became popular with German market and others. Now being added more often as excursion/experience by operators.	Appropriate for part of archaeological/cultural route off-season. Further promotion as wedding, reception destination.
Faliraki						P	P	Favoured by families, for water park, bowling. Restaurants, night life.	Not much off-season potential evident.

Product	Target Market Appeal							Current Experience	General Comments
	Winter Warmer	Outdoor Enthusiasts	Culturally Curious	Special Interest	MICE	Sun, Sea, Beach	Cruise Visitors		
Faliraki Water Park						P	P	Popular with families and young adults.	Currently open May – October. Explore possibility of extending to shoulder seasons?
Faliraki Beaches						P	P	Beaches cater to all – water sports, pedalos, snorkelling, boat trips, sunbeds, beachside meal/drink service.	

ANNEX 4

DESTINATION INSIGHTS

Annex 4: Destination Insights

Examples of destination management-related activity from around the globe, which Rhodes might find illustrative in addressing locally specific destination management challenges.

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Building a sustainable visitor economy.....	150

Visitor Management in Heritage Cities

Avila's Smart Heritage City single open code tool



IMAGE SOURCE: [HTTP://SHCITY.EU/NOTICIA.ASP?LANGUAGE=ES&ID=29](http://shcity.eu/noticia.asp?language=es&id=29).

The city of Avila, 115km west of Madrid in Spain, is a city rich in heritage suffering from congestion due to large numbers of day visitors (Spanish residents and international visitors staying in central Spain). The city receives some 400,000 visitors each year.

The city, which is a UNESCO World Heritage Site, will be the pilot city for the European INTERREG Smart Heritage City (SHCity) project which aims to encourage the evolution of the Smart City to the Smart Heritage City by creating a single open source tool to gather data on heritage urban centres to facilitate their management and their conservation. The SHCity management system will be demonstrated and validated in Avila where more than 226 detector sensors have been installed in its historic centre. Those sensors will be able to assess 1,000 parameters in museums and monuments in order to protect them (such as risk elements affecting buildings and their surroundings, management of energy consumption, control and planning of the flow of visitors). As part of the project, a mobile app, available in four different languages, has also been developed for visitors to enhance their awareness and knowledge of the conservation of heritage sites, including features such as: list of monuments/sites of interest, list of proposed circuits/itineraries, videos and other useful information on the city and its services. The project has a budget of about 1.2m euros, 75% of which is financed by the European Regional Development Fund.

Sources:

'Facing the overtourism challenge in cultural and natural heritage sites using open/big data – Summary', Generalitat Valenciana (2019), p.14, available at http://www.turisme.gva.es/turisme/es/files/pdf/HD_Summary_BENCHMARKING.pdf.

Interreg Sudoe SHCity website available at <https://www.interreg-sudoe.eu/gbr/projects/the-approved-projects/148-smart-heritage-city>.

Smart Heritage City (SHCITY) website available at <http://shcity.eu/>.

'App para turistas de la ciudad de Avila', Smart Heritage City (SHCITY) website (2019), available at <http://shcity.eu/noticia.asp?language=es&id=29>.

Florence's open big data system



IMAGE SOURCE: [HTTPS://WWW.COMUNE.FI.IT/](https://www.comune.fi.it/).

In an attempt to resolve its overcrowding problem, the city of Florence (Italy) has starting using open big data. The City has created a new system that will inform tourists about the level of overcrowding in the various areas of the city, through Wi-Fi on their smartphones in real time. The system will use a simple traffic light signage system (green/yellow/red) to orient them during their stay, proposing alternative routes and suggesting visits to lesser known or less crowded museums and exhibitions at that time. Sensors have been installed in strategic points in the city, tracking attendance with data analysed anonymously. Florence had already introduced measures to manage the tourist flows with the Firenze Card introduced in 2011. Results have confirmed that this instrument has contributed to the increase of visits to lesser known museums and of the duration of the average stay in the city.

Source: 'Facing the overtourism challenge in cultural and natural heritage sites using open/big data – Summary', Generalitat Valenciana (2019), p.25, available at http://www.turisme.gva.es/turisme/es/files/pdf/HD_Summary_BENCHMARKING.pdf.

Amsterdam's overcrowding in the public space monitoring system



IMAGE SOURCE: [HTTPS://WWW.AMSTERDAM.NL/EN/POLICY/POLICY-TRAFFIC/](https://www.amsterdam.nl/en/policy/policy-traffic/).

Amsterdam, the capital of the Netherlands, has developed an 'overcrowding in the public space' monitoring system, currently operating in two critical points of the city: the Redlight 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 in the rest of the city.

In addition, Amsterdam Airport is using the Veovo BlipTrack Guest Predictability system, based on an 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 help the airport to improve contingency planning.

Sources: 'Facing the overtourism challenge in cultural and natural heritage sites using open/big data – Summary', Generalitat Valenciana (2019), p.25, available at http://www.turisme.gva.es/turisme/es/files/pdf/HD_Summary_BENCHMARKING.pdf.

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

Triple axis model: tourism, urban planning and mobility

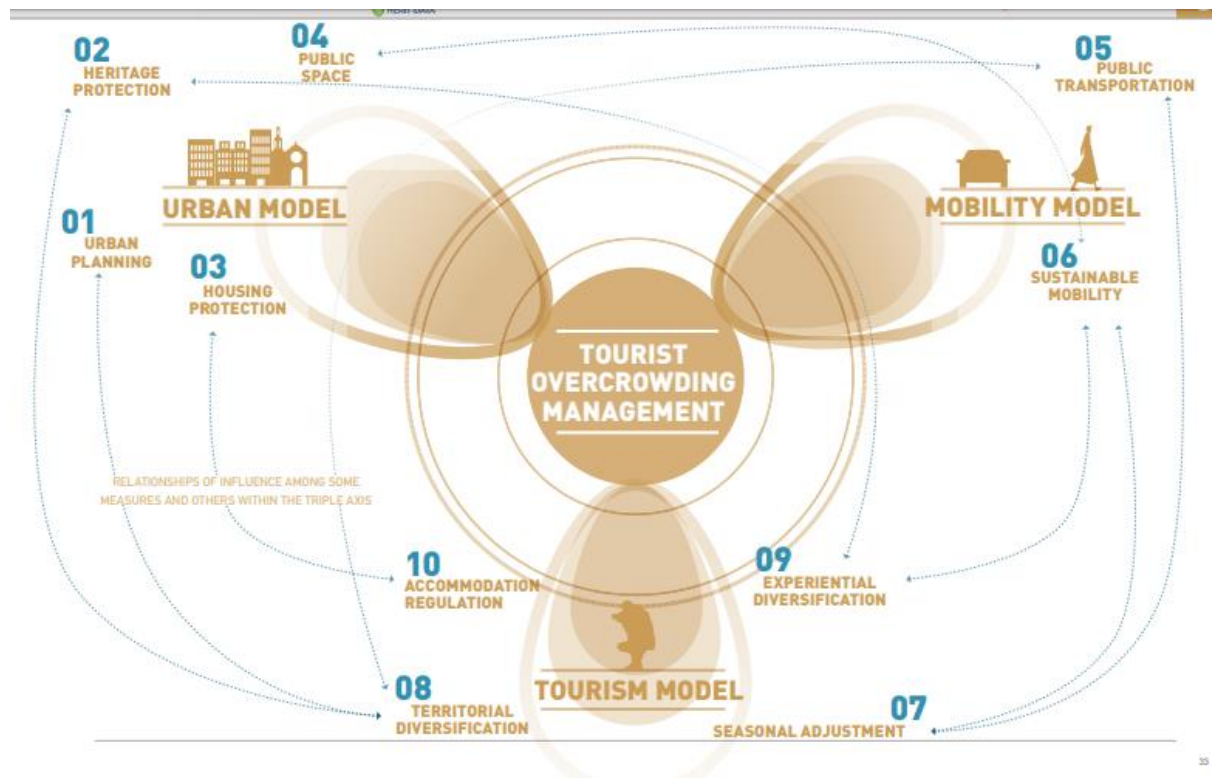


IMAGE SOURCE:

[HTTP://WWW.TURISME.GVA.ES/TURISME/ES/FILES/PDF/HD_SUMMARY_BENCHMARKING.PDF](http://www.turisme.gva.es/turisme/es/files/pdf/HD_SUMMARY_BENCHMARKING.PDF).

The Interreg Mediterranean Integrated Territorial Project, 'HERIT-DATA', aimed to identify the best techniques and tools for sustainable planning and responsible tourism management in certain MED regions and cities to improve decision-making processes by public administration and tourism or heritage managing bodies. As part of the project, one Partner, Turisme Comunitat Valenciana, conducted some research aimed at reviewing the issues relating to tourism overcrowding and producing case studies in order to recommend actions for the management of tourism overcrowding by means of new technologies. The results of their study suggest a triple axis 10 action areas model based on Tourism, Urban Planning and Mobility to assist the tourist overcrowding management of destinations. It details mechanisms to correct the negative impacts of overtourism on destinations and suggests use of new technologies to improve the correction mechanisms by actions.

TOURIST OVERCROWDING MANAGEMENT MODEL

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

- **Mobility Model** – Public Transportation; Sustainable Mobility.
- **Tourism Model** – Seasonal Adjustment; Experiential Diversification; Territorial Diversification; Accommodation Regulation.

Sources:

'Facing the overtourism challenge in cultural and natural heritage sites using open/big data – Summary', Generalitat Valenciana (2019), p.32-33, available at http://www.turisme.gva.es/turisme/es/files/pdf/HD_Summary_BENCHMARKING.pdf.

HERIT-DATA website, available at <https://herit-data.interreg-med.eu/the-project/>.

Visitor Management Planning – Spreading the Benefit and the Load

Japan's Dragon Route (or 'Shoryudo')



IMAGE SOURCE: [HTTPS://WWW.DRAGONROUTE.NET/DRAGON_E/](https://www.dragonroute.net/dragon_e/).

This is an example of a destination which have developed a new route to encourage visitors to travel to less congested sites. Located in the Chubu region in central Japan, the Japan's Dragon Route was created in 2012 through a public-private-partnership to provide tourists with an enriching cultural experience, while putting less pressure on the congested Kyoto-Osaka-Tokyo corridor. The route features a wide range of historic and cultural sites, natural landscapes (including Mount Fuji), and hot springs. The route official website (http://www.dragonroute.net/dragon_e/dragon/) details the five different routes options, allowing visitors to customise their experience by purpose and theme: Happiness; Kindness; Health; Enjoyment and Luxury.

Sources:

'Coping with success – Managing overcrowding in tourism destinations', WTTTC/McKinsey&Company (2017), p.44 available at <https://www.wtttc.org/-/media/files/reports/policy-research/coping-with-success---managing-overcrowding-in-tourism-destinations-2017.pdf>.

Dragon Route Promotion Council website at http://www.dragonroute.net/dragon_e/dragon/.

Istria Gourmet Tourism Product Development



IMAGE SOURCE: [HTTPS://WWW.ISTRA.HR/EN](https://www.istra.hr/en).

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

Removal of Traffic from Town Centres (Rhodes)

Ghent's car-free city centre



IMAGE SOURCE:

[HTTPS://WWW.STEPUPSMARTCITIES.EU/PORTALS/51/DOCUMENTS/GHENT%20CAR%20FREE%20CITY%20CENTRE.PDF](https://www.stepupsmartcities.eu/portals/51/documents/Ghent%20Car%20Free%20City%20Centre.pdf).

In 1996, the city of Ghent in Belgium created a car free city centre of 35 hectares as the local authority believed that in combination with the revaluation of the city centre it would have positive effects on environment, liveability, economy and tourism for the city. Squares and riversides became key meeting points and the city centre became safer. Digital tools were introduced such as digital parking guides and apps to encourage slow transport. Mobility was the main focus of the car free city centre model, encouraging and developing other types of transport (cycling, car sharing, electric boats etc.) stimulating new businesses. The car free city centre of Ghent was heavily promoted, positioning Ghent's car free city centre as a shopping area. The new mobility plan was introduced and dedicated communications plans were designed for retailers and residents. The mobility plan 1996 was based on an integrated approach, combining urban planning, technical and ICT infrastructure, mobility and parking company, NGOs and local economy and tourism actors. The required financial investment was minimal,

with only the costs of traffic signalling, but it opened up possibilities for redesigning public spaces. Results have been positive in terms of air quality, CO2 reduction, number of pedestrians and cyclists, increase use of underground parking and increase in number of restaurants and bars in the city centre. In 2017, a new circulation plan was introduced opening up even more space for pedestrians and cyclists in the city centre.

Sources:

'Car free city centre', STEP-UP available at <https://www.stepupsmartcities.eu/Portals/51/Documents/Ghent%20Car%20free%20city%20centre.pdf>.

'Light House Projects Ghent – Car free zone', Ghent Mobility Company, available at <https://www.stepupsmartcities.eu/Portals/51/Documents/Presentations/Gothenburg%20workshop/STEP-UP%20Mobility%201%20Car%20free%20center%20%E2%80%93%20Ghent.pdf>.

'Ghent's Circulation Plan', The Square.Gent (2019), available at <https://thesquare.gent/leisure/circulation-plan-gent/>.

Creation and Promotion of New Experiences and Events To High Yield Niche Markets

Paris' Unique Experiences



International promotion of Nuits Parisiennes

► ACTION 12

Paris City Hall, along with nightlife industry professionals, have developed an ambitious action plan to support and promote Nuits Parisiennes (Parisian Nights) internationally. Paris' nightlife is one of the most vibrant in the world, with 265 theatres and cabarets, 4,000 terraces open at night, 200 clubs, 100 concerts every night... The goal is to promote this nightlife, and make it accessible to everyone by organising exceptional events such as the Nuit Blanche, by hosting influential figures, or other promotional events; trialling a "night pass"; or even creating an "after-work" offer for business visitors.



REVEAL NEW TERRITORIES

• Create district brands to reveal new districts in order to allow visitors to discover little known aspects of Paris

IMAGE SOURCE: [HTTPS://API-SITE-CDN.PARIS.FR/IMAGES/98499](https://api-site-cdn.paris.fr/images/98499).

Paris has developed some unique experiences as a response to the challenge the city faces to diversify its tourism offer, in order to create an urgency to visit as well as to encourage repeat visits. Paris has decided to develop niche markets (such as night tourism, savoir-faire tourism, memorial tourism, or urban walks) and also to promote lesser known areas of Paris. Paris is encouraging the development of those unique experiences by:

- **Strengthening assets** – Improve welcome services at the Eiffel Tower, renovate the Arc de Triomphe and Parisian places of culture and worship, and improve the lighting in Paris, redevelop and organise new activities on the Champs-Élysées; Create Parisian seasons, translate and distribute the Parisian cultural programme internationally; Develop 'savoir-faire' tourism, create a 'made in Paris' label, and provide support for shopkeepers and artisans; Create showcase spaces for Parisian gastronomy; Modernise the infrastructures for hosting business events and implement proactive approaches to welcoming large conferences and trade shows.
- **Reinforcing emerging sectors** – Implement an ambitious international promotion plan for Parisian nights; Structure the LGBT tourism offer; Develop urban tourism; Host a major international event at least once a year; Redevelop the banks of the Seine, launch the 'Reinventing the Seine' call for projects, develop swimming and nautical activities.
- **Developing new offers** – Open the abandoned railway, La Petite Ceinture, create urban farms, festivals and entertainment in the forests and gardens, develop 'sustainable Paris' walk; Create tourism routes on the history and memory of Paris, improve the quality of visits to Père Lachaise cemetery; Create events during the off-peaks periods to guarantee experiences year round.
- **Revealing new territories** – Create district brands; Develop tourism offer in the Greater Paris area.

Source: '2022 Tourism Strategy Development Plan', Mairie de Paris (2016), p.12-15 available at <https://api-site-cdn.paris.fr/images/98499>.

New Zealand's targeting of the premium sector

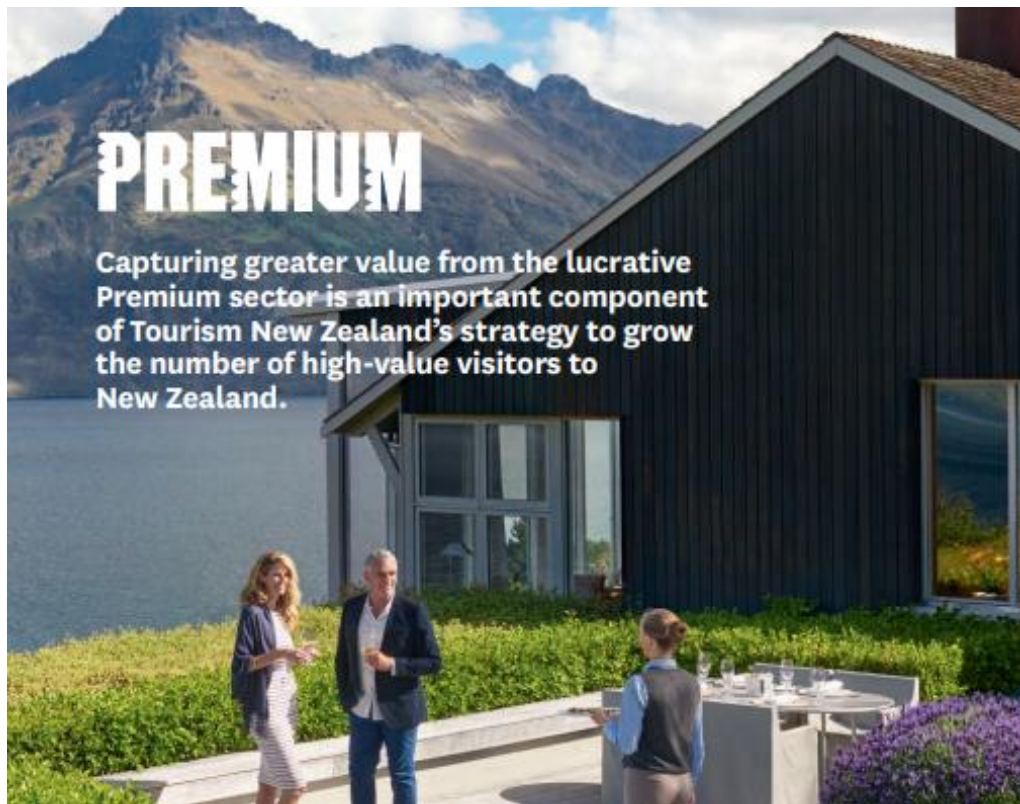


IMAGE SOURCE: [HTTPS://WWW.TOURISMNEWZEALAND.COM/MEDIA/3426/PREMIUM-INFOGRAPHICS.PDF](https://www.tourismnewzealand.com/media/3426/premium-infographics.pdf).

Tourism New Zealand (TNZ), the national DMO for New Zealand, is pursuing a strategy to grow the number of high-value visitors to the country and reaching the premium sector is an important component of it. After receiving additional funding in 2013, TNZ set up to build its sector expertise and establish strong industry partnerships. TNZ's premium sector strategy works to improve the awareness of New Zealand as a luxury destination amongst high net-worth individuals and their advisors. In order to do so, TNZ works through trade marketing, media and PR and consumer marketing in target markets to:

- Strengthen New Zealand's luxury destination image – in July 2016, TNZ launched its 'Perfection from every perspective' campaign showing the fresh take on luxury offered by New Zealand.
- Develop and leverage strong partnership with in-market luxury travel sellers.

Source: *Premium*, Tourism New Zealand (2017), available at <https://www.tourismnewzealand.com/markets-stats/sectors/premium/>.

Extending the Season

Dubrovnik's out-of-season events development



IMAGE SOURCE:

[HTTP://WWW.TZDUBROVNIK.HR/LANG/EN/GET/GOOD_FOOD_FEST/62522/GOOD_FOOD_FESTIVAL_2019.HTML](http://www.tzdubrovnik.hr/lang/en/get/good_food_fest/62522/good_food_festival_2019.html).

Dubrovnik Tourist Board (www.tzdubrovnik.hr/) (DTB) puts emphasis on creating new content during the off-peak season. For example:

- 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.

The out-of-season projects require suitable content so as 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

Brussels 'Winter & Summer in Brussels' campaign



IMAGE SOURCE: [HTTPS://VISIT.BRUSSELS/EN/ARTICLE/SUMMER-BRUSSELS-BREATH-IN-THE-CITYS-MANY-PERFUMES-THIS-SUMMER-IN-BRUSSELS](https://visit.brussels/en/article/summer-brussels-breath-in-the-citys-many-perfumes-this-summer-in-brussels).

visit.brussels is the Brussels tourist agency with the mission of bolstering and spreading the image of the Brussels-Capital region. In order to extend the season and develop tourism in the city when hotel occupancy is at its lowest, visit.brussels develops online and offline promotional campaigns specifically dedicated to those low seasons for the city (summer and winter) in collaboration with the affected sectors (hotels, museums, attractions, restaurants etc.). The campaigns aim to encourage and help hoteliers create attractive package offers during the low seasons. From 2020 onwards, these promotional campaigns 'Winter in Brussels' and 'Summer in Brussels' will be coordinated by the Sales & Marketing department, while the cultural content of the campaigns will be provided by the Product Development department of visit.brussels.

Source: 'Be there, be.brussels – Action Plan 2020', visit.brussels available at <https://visit.brussels/site/en/article/action-plan-2020>.

'Half Price Poznań'; Poznań



IMAGE SOURCE: [HTTP://POZNAN.TRAVEL/EN/R/POZNAN-ZA-POL-CENY/12-POZNAN-ZA-POL-CENY-04-05-05-2019](http://POZNAN.TRAVEL/EN/R/POZNAN-ZA-POL-CENY/12-POZNAN-ZA-POL-CENY-04-05-05-2019).

What started off as the simple acknowledgement of touristic phases, meaning less people were likely to visit the city in winter and spring time, resulted in the implementation and extension of a municipal action inspired by bargain sales. 'Half Price Poznań' is regarded as a great marketing strike, offering tourists to visit the city off-season, while benefitting from a 50% discount with over 200 participating partners. Several cultural institutions, hotels and tourism branches offer their own range of products and services for half of the regular price during a certain period of time, when the city is considered to be less attractive to tourists. Following a similar idea of optimising the use of capacities through sharing them with others, the Poznań Fair, which normally hosts fairs and industry meetings within its huge spaces all over the year, now lends these spaces each year to the city to organise 'The Summer at the Fair' event. This event offers free workshops for children, an outdoor cinema and themed Saturdays to trigger the local population's creativity.

Andalucía's suggestions for seasonality

Andalucía participates in programmes like Europe Tourism Senior or different university exchange programmes to extend the season. The segment of retired people is specifically focused as the market of collective travelling is growing and there are less restraints than before.

Another suggestion is the adoption of technology to enhance distribution. The aim is to ensure that tourism establishments are present in the most cost-effective variety of channels and adopt an effective pricing strategy. It is suggested that using dynamic

pricing, discounts and effective channel management are a necessity when communicating with the market and aiming to fight with seasonality.

A further potential measure is to reduce airport taxes during low season, as in Mallorca, to stimulate travellers to Andalucía. Another possibility is the creation of new connection with major airports, such as London, Paris, Frankfurt, Istanbul, Rome.

Premium Quality, With Exclusive Image, in all respects

Visit Flanders focusing on cultural and MICE travellers

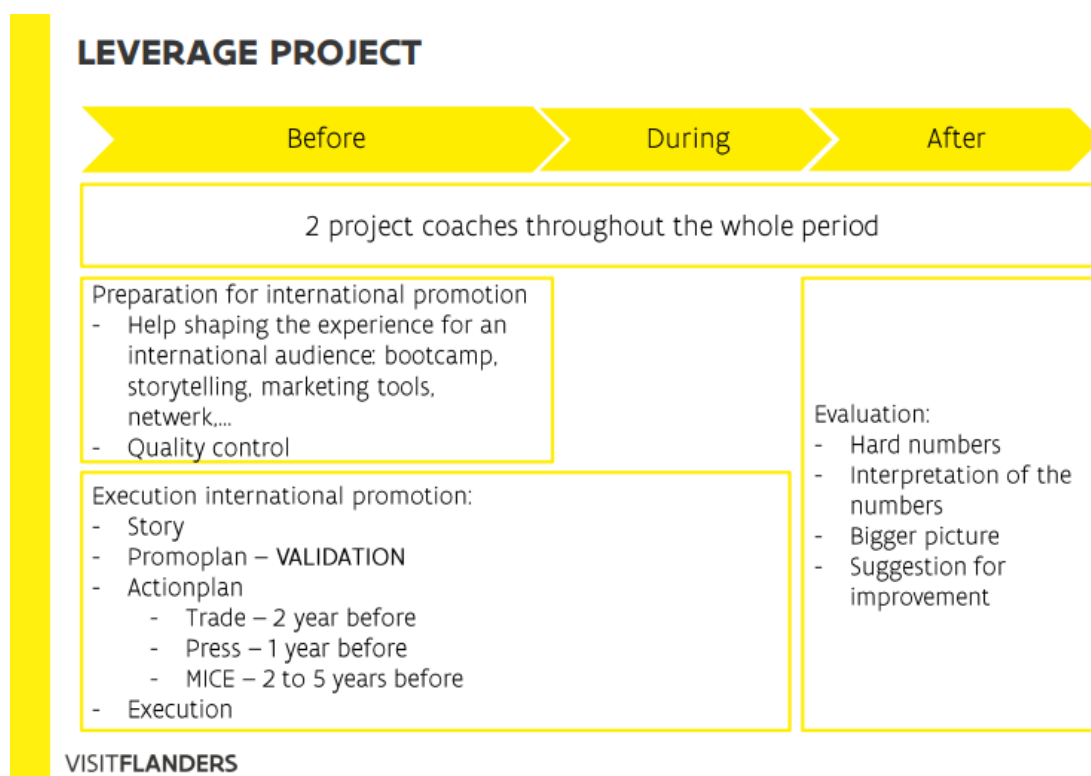


IMAGE SOURCE:

[HTTPS://WWW.TOERISMEVLAANDEREN.BE/SITES/TOERISMEVLAANDEREN.BE/FILES/INTERNATIONALE PROMOTIE%20-%20KATRIEN%20DEJONGHE.PDF.](https://www.toerismevlaanderen.be/sites/toerismevlaanderen.be/files/internationale_promotie%20-%20katrien%20dejonghe.pdf)

In its 2016-2020 Strategy, VisitFlanders (the DMO for the region of Flanders in Belgium) highlighted its objectives which are: to increase the economic impact of tourism in Flanders; extend the reputation of Flanders as a qualitative tourist destination; and raise the participation of Flemish people in tourism. Consequently, VisitFlanders decided to focus on valuable segments and chose the cultural traveller and MICE traveller. Cultural travellers can be motivated by different types of cultural experiences such as heritage experience, art experience and local culture experience. In terms of MICE traveller, VisitFlanders is concentrating primarily on international associations and companies

operating in economic growth sectors for Flanders, focusing on attracting association conferences. In the last five years, they have invested 72 million euros in specific experiences through large leverage projects that match their chosen target segments. VisitFlanders validates quality projects with good business plan, full support of project coaches, potential for international promotion and obviously experiences executed to a high quality with multilingual support. VisitFlanders provides project support for the all duration of a leverage project, from trade activation two years before opening to the project evaluation and improvements suggestions.

Sources:

'Destination Stewardship: Taking a closer look at Boracay and Visit Flanders', a WTTC Webinar, slides 40-42, available at <https://www.wttc.org/-/media/files/webinars/destination-stewardship-webinar-final.pdf>.

'International Promotion – Bootcamp 25/10/17', VisitFlanders (2017), available at <https://www.toerismevlaanderen.be/sites/toerismevlaanderen.be/files/InternationalePromotie%20-%20Katrien%20Dejonghe.pdf>.

'Marketing Strategy 2016-2020', VisitFlanders (2016), available at <https://enot.publicprocurement.be/enot-war/viewNoticeDocument.do?noticeFileId=361785>.

Strengthened Engagement of Village Communities in Tourism

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



IMAGE SOURCE: [HTTPS://S3-EU-WEST-1.AMAZONAWS.COM/TRAVELFOUNDATION/WP-CONTENT/UPLOADS/2018/09/21110258/CASE-STUDY-DOWNLOAD-CROATIA.PDF](https://s3-eu-west-1.amazonaws.com/TRAVELFOUNDATION/WP-CONTENT/UPLOADS/2018/09/21110258/CASE-STUDY-DOWNLOAD-CROATIA.PDF).

The Makarska Riviera in Croatia has seen rapid growth in international tourism which represented opportunities, but also challenges as stakeholders were more accustomed to a lower level of visitors and a different type of visitors more domestic and regional. The Travel Foundation, in partnership with the TUI Care Foundation and with cooperation from TUI Group, have trailed an approach to strengthen relationships between the tourism sector and local communities across two coastal village resorts in the region by taking a more inclusive approach to tourism development. The project explored how new tourism developments could be more effectively integrated to provide greater benefits to local economies:

- **Stakeholder relationship building** – both villages now have operational destination councils with representation from the local tourism boards, hotels, TUI and small local businesses. Meetings are held regularly and action plans developed and implemented.
- **Local product development and marketing** – supply-side initiatives including training and demand-side initiatives encouraging hotel guests to explore the villages.
- **Promotion of local culture and heritage** – development of two self-guided cultural heritage walking itineraries produced and disseminated by the village tourism boards; increase accessibility of heritage sites; sharing of information on events with hotel staff.
- **Youth employment and enterprise** – workshop to improve local employment opportunities for young people.

Source: 'Involving Communities in Tourism development Croatia', The Travel Foundation Case Study, available at <https://s3-eu-west-1.amazonaws.com/travelfoundation/wp-content/uploads/2018/09/21110258/Case-study-download-Croatia.pdf>.

Linz – Enabling young people to fulfill their potential in the tourism industry



IMAGE SOURCE: [HTTPS://ISSUU.COM/FOESSLEITNER/DOCS/T-LAB-BOOK-F-SINGLE](https://issuu.com/foessleitner/docs/t-lab-book-f-single).

The city of Linz has created platforms to specifically integrate a younger generation so that they take responsibility for the future of their city and feel a sense of ownership whilst they learn and participate from the established network. The Linz Tourism Board invests a considerable amount of time and money in order to promote these elements. 'Next Generation' is a project designed to utilise the potential of young people who are in education and interested in tourism. Linz cooperates with the Sigmund Freud University and several tourism schools. Together with 43 students, nine new products for tourism development in Linz have been drafted and discussed. The main goal is to create new products and offers to attract more people under the age of 25 (as visitors, employees and students) to Linz. In 2017, students from all participating educational institutes had the chance to present their ideas to representatives from the fields of business, politics, media and education at a specially organised conference called the 'Linz Tourismus Lab'. Firstly, the project has helped raise awareness of the tourism industry among the next generation. A lot of young people do not feel they have a future in tourism because negative aspects such as long working days, low salaries and poor working conditions give them cause for concern. The project has demonstrated that tourism is a flourishing and growing industry with a lot of interesting job opportunities for young people. As part of the project, new tourist products and offers for the 'Next Generation' target group (up to 30 years of age) are being developed, tested and evaluated.

Enhanced Access to Cultural and Natural Heritage and Character

Melbourne – the revitalisation of City Laneways

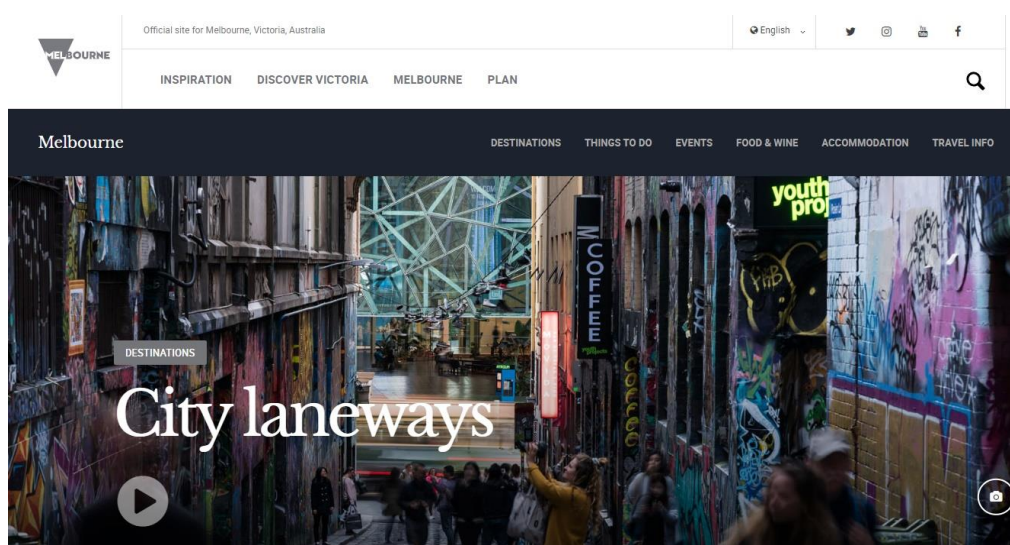


IMAGE SOURCE:

[HTTPS://WWW.VISITMELBOURNE.COM/REGIONS/MELBOURNE/DESTINATIONS/LANEWAYS.](https://www.visitmelbourne.com/regions/melbourne/destinations/laneways)

The example of Melbourne is a good example of re-envisioning overlooked spaces devoid of life as public assets. In 1994, most of the network of laneways in Melbourne, Australia, used to be abandoned and inaccessible, but it has now been transformed into inviting passages, lined with inviting eateries, bars, boutiques, street art and residences. The revitalisation of the city laneways was the result of economic, social and cultural circumstances, coupled with state policy reform and urban design strategies to build upon the city's assets and historic heritage. The City of Melbourne and the State Government of Victoria delivered a suite of initiatives to improve the public realm over the long-term, mitigating the decline of the city centre and exodus of people and businesses. For example, the City focused on improving the pedestrian experiences, increasing green spaces and improving street lighting. New building planning restrictions were introduced ensuring strong connection between buildings and the pedestrians on the street which in turns contributed to the development of diverse and independent businesses. Other factors contributed to this revival including the relax of the state liquor laws, the promotion of public art projects to beautify the laneways and initiatives to encourage more residents to live in Melbourne city centre. The city centre became more inviting and people spent more time in them. The revitalisation of the laneways have helped to repair missing links in the pedestrian network.

Source: 'Melbourne: a case study in the revitalisation of City Laneways', The Urbanist (2015), available at <https://www.theurbanist.org/2015/09/16/melbourne-a-case-study-in-the-revitalization-of-city-laneways-part-1/>.

Dubrovnik Site refurbishment project with Lazareti Creative Hub of Dubrovnik



IMAGE SOURCE: [HTTPS://WWW.LAZARETIHUB.COM/EN/ABOUT-PROJECT](https://www.lazaretihub.com/en/about-project).

The Lazareti Creative Hub of Dubrovnik Project ran between 2015-2019 and was over 75% financed by EU funds for a total value of about EUR4.56m. The main objective was to enhance cultural heritage management, contributing to the sustainable development in the city of Dubrovnik and helping to position Dubrovnik as a cultural and historic destination at local, regional, national and global level. The project was initiated and managed by the City of Dubrovnik in partnership with public institutions, NGOs and private enterprises. It consisted of the renovation of the three naves of the historic Lazareti building and the development of new cultural and touristic programmes for the local community and visitors. Sustainability was an important part of the redevelopment, including the introduction of renewable energy sources for outdoor illumination, three smart benches and LED lights. It was also re-developed to be accessible and cater for the needs of visitors with different disabilities.

Source: Lazareti Creative Hub of Dubrovnik website, available at <https://www.lazaretihub.com/en/about-project>.

Ljubljana's sustainable cultural tourism development



IMAGE SOURCE: [HTTPS://WWW.EFA-AEF.EU/MEDIA/5834-181104-LJUBLJANA-TOURISM.PDF](https://www.efa-aeef.eu/media/5834-181104-LJUBLJANA-TOURISM.PDF).

Visit Ljubljana is a good example of a DMO which through active and innovative practices managed to develop the tourism product. Important to note is that Slovenia has been working on developing sustainable tourism for the last 11 years, even before

sustainability became a must. Anticipating the change of customers' lifestyles and demands has proven to be very rewarding. Ljubljana received this year ITB's Best of Cities sustainable award and it won the sustainable award in the European Capital of Smart Tourism competition. At the same time for the last 10 years, the city has registered a 115% growth in visits and a 106% growth in overnight visits. In 2010 the average length of stay was 1.9 days and for 9 years, it was extended to 2.4 days. One of the main reasons is the increase in congress events (59) which is almost the same number as cities like Milan (61) or Glasgow (52). On the other hand, during the last 3 years, Ljubljana has been relying heavily on cultural tourism to motivate travellers to visit the city because of its cultural offer and to increase the share of foreign visitors in that segment. As a result, the city hosts more than 14,000 events per year and Visit Ljubljana has co-financed 48 projects and more than 1,000 open-air events in 2017. It is not by chance, that Ljubljana is prioritising culture, as cultural tourists spend on average 36% more and stay 22% longer than leisure travellers.

The organisation is also regularly performing researches to prevent overtourism and observe the attitude of the locals towards tourists, as Ljubljana is also reaching the limits of its carrying capacity. Although the results were not concerning, Visit Ljubljana is already engaging in discussion and strategy development with nearby towns and municipalities in order to spread the flow of tourists.

Sources:

'How Culture and Heritage Tourism Boosts More Than a Visitor Economy', MyTravelResearch.com® available at <https://www.mytravelresearch.com/culture-and-heritage-tourism-boosts-visitor-economy/>.

'ICCA Statistics Report 2018 Shows Record Results for Ljubljana and Slovenia', VisitLjubljana (2019), available at <https://www.visitljubljana.com/en/ljubljana-convention-bureau/news/sveze-porocilo-icca-2018-prinasa-rekordne-rezultate-za-ljubljano-in-slovenijo/>.

'Slovenian tourist destinations satisfied with the 2018 statistics', Slovenia Tourist Board (2019), available at <https://www.slovenia.info/en/press-centre/news-of-the-tourism-press-agency/9188-slovenian-tourist-destinations-satisfied-with-the-2018-statistics>.

'Slovenian Tourism With Great Results in 2018', Slovenian Convention Bureau (2019), available at <https://www.slovenia-convention.com/slovenian-tourism-with-great-results-in-2018/>.

'Interview with Maja Pak on Slovenia, Destination Marketing and Sustainable Tourism Strategies', Sustainability Leaders Project (2018), available at <https://sustainability-leaders.com/maja-pak-interview/>.

'Ljubljana – Cultural Tourism as key element of Strategy of Development', VisitLjubljana (2018), available at <https://www.efa-aef.eu/media/5834-181104-ljubljana-tourism.pdf>.

'Interview with Jana Apih of GoodPlace on Sustainable Tourism in Slovenia', Sustainability Leaders Project (2017), available at <https://sustainability-leaders.com/interview-jana-apih/>.

Building a Sustainable Visitor Economy

Aruba's tourism economy based on sustainability



IMAGE SOURCE: [HTTPS://ARUBA.BYNDER.COM/M/11BDF83384A8C48F/ORIGINAL/ARUBA-PROMISE-IMAGE-VARIANT-6-V2.JPG](https://aruba.bynder.com/m/11bdf83384a8c48f/original/aruba-promise-image-variant-6-v2.jpg).

Tourism is paramount to the economy of the island of Aruba and, with climate change posing a threat to their long-term livelihood, the Government has focused its work on developing a unique and innovative approach to safeguarding the destination. The island has become a model for other Caribbean destinations, inspiring them to become more sustainable. Aruba has heavily invested in future-proofing the island, proactively

taking steps towards tackling climate change's impact on the island. The island has received various awards in recognition of its progressive sustainability efforts.

The Government of Aruba recognises that sustainability is a long-term commitment which requires ambitious solutions and creative partnerships, and importantly a cultural transformation and mindset shift. Initiatives illustrating Aruba's unique approach include:

- **Engaged Government** – with budget allocated to the office of innovation, which collaborates with public and private entities to develop solutions to environmental challenges and ambitious sustainability goals – such as the bans on single use plastic and reef-destroying sunscreen and opening the island as a testing hub for renewable solutions for the planet.
- **Innovative and engaged private sector stakeholders** – with the example of Bucuti & Tara Beach Resort, one of the leaders of environmentally sustainable development and low-impact practices on the island (and now regional leader). The resort was built in 1987 as an ecologically conscious property and has now become the first carbon-neutral resort in the Caribbean. Some of their initiatives include: use of locally grown food, reduction of portion sizes to decrease food waste and diverting any remaining scraps to a pig farm rather than to a landfill, elimination of almost all of the plastic used on the property, use of solar panels and gym equipment that helps generate power.
- **Engaged citizens through grassroots organisations** – Aruban citizens are working to build a more environmentally and socially responsible tourism future for the island, working to reduce the prevalence of single-use plastic, opening 'maker labs' to reduce and upcycle waste, and leading the charge toward an Aruba Pledge that will define the island's sustainable future.
- **Active DMO** – the Aruba Tourism Authority has developed a 'human-centric' action plan for 2020 and beyond and launched the 'Aruba Promise', aimed at visitors. The voluntary pledge asks arriving guests to acknowledge their responsibility to the island and act as an ecologically and socially responsible visitor to help preserving the island for generations to come. They are then invited to share their promise to social media and 'embrace the one happy island spirit'.

Sources:

'Aruba is building a tourism economy centered on sustainability', Aruba Tourism Authority / Skift (November 2019) at <https://skift.com/2019/11/07/ARUBA-IS-BUILDING-A-TOURISM-ECONOMY-CENTERED-ON-SUSTAINABILITY/>.

'Aruba Promise' at <https://www.aruba.com/us/aruba-promise>.

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