GREEK TOURISM 2030
ACTION PLANS

# Executive Summary

August 2021

Part of the study:

"Action Plans to enhance the competitiveness and structural adaptation of the tourism sector"

Με τη συγχρηματοδότηση της Ελλάδας και της Ευρωπαϊκής Ένωσης

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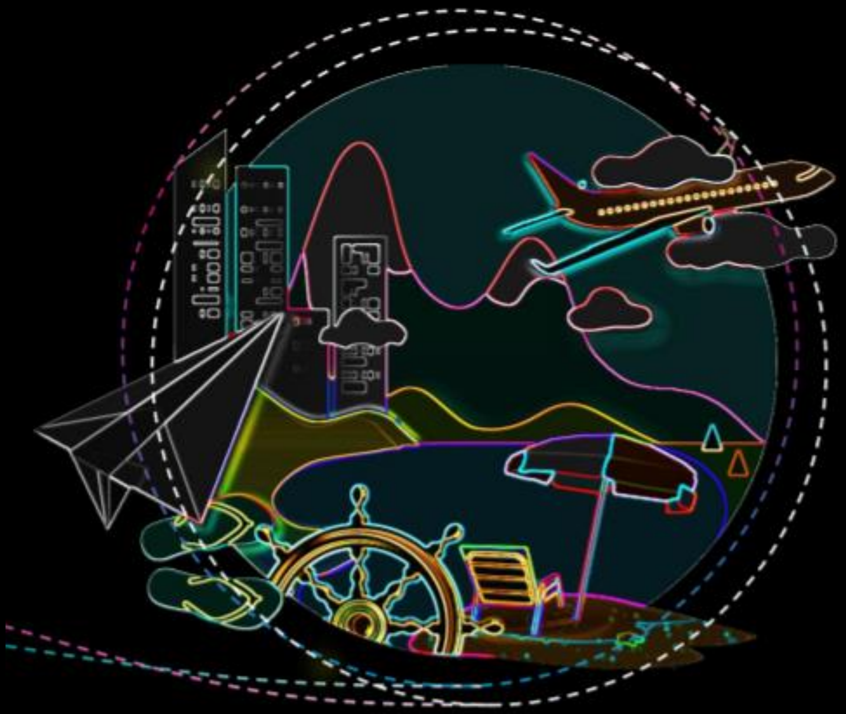
# Contents



# Project Overview



# Project Goals

The project "Action Plans to enhance the competitiveness and structural adaptation of the tourism sector" (hereinafter referred to as the "Project") primarily focuses on determining the tourism policy for each Region, developing Greek tourism, upgrading the sector's businesses, and facilitating networking and partnerships among businesses with a view to showcasing tourist destinations.

**Task**

Actions to forecast and monitor changes in the Tourism Sector in order to enhance its competitiveness and structural adaptation

**Subprojects**

1. **Action Plans to enhance the competitiveness and structural adaptation of the tourism sector**
2. Monitoring / Presenting tourism figures with an emphasis on less developed areas
3. Actions to monitor the capacity of tourist destinations and tourism sector businesses, Actions to Spread / Promote the Task, and Actions to Coordinate and support with Scientific Evidence its realization
4. Development of a toolbox to enhance the entrepreneurship and competitiveness of Greek tourism businesses

**Project key goals**

1. Determining the tourism policy for each individual Region
2. Further developing Greek tourism
3. Upgrading the capacity of the sector's businesses and enhancing their competitiveness and productivity
4. Facilitating networking and partnerships among businesses with a view to showcasing tourist destinations.

# Project Overview

The key assignments that were performed in the context of the successful realization of the Project are presented below.

## Project assignment units and key deliverables

### A B — Analysis of international market trends & Analysis of current situation per Region

**Analysis of international market trends**

- Analysis of **major trends** affecting the tourism industry, their impact, and the ways in which destinations address such issues
- Analysis of **international trends per tourism product**
- Selection and analysis of **significant and emerging markets** for Greece

Deliverable D2: Analysis of international market trends

**Analysis of current situation per Region**

- Analysis of **accessibility** per Region
- Mapping of **primary and supplementary products** per Region
- Overview of **current demand and supply characteristics** per Region
- **SWOT analysis** per Region

Deliverable D3: Analysis of the current situation in Greece per tourism product and supplementary product (enabler) per Region (x13), SWOT analysis

### C — Strategy and action plan per destination

- **Selection of indicative destinations** for development per Region
- Formulation of **attractive Product Market Combinations** per indicative selected destination
- **Development of an action plan** which takes into account the principles of sustainability

Deliverable D4: Strategy and action plans per destination

### D — Impact and prerequisites per destination

- **Overview of the impact** of the strategy and action plan per selected indicative destination
- Evaluation and indicative **schedule of public strategic actions** of the action plans
- Identification and analysis of the **key prerequisites** for the successful realization
- Overview of the **role of stakeholders involved**
- Identification of **required investments** in accommodation and public infrastructure

Deliverable D5: Impact / Prerequisites per destination

### E — Strategic design and action plans per Region and for the entire country

- **Action plan** for the implementation of the strategy per destination
- **Summary of strategies and action plans** per product, per Region, and for the entire country

Deliverable D6: Strategic design and action plans with results per tourism product / supplementary product (enabler) per Region and for the entire country

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In the context of the project, the following Deliverables were also produced:

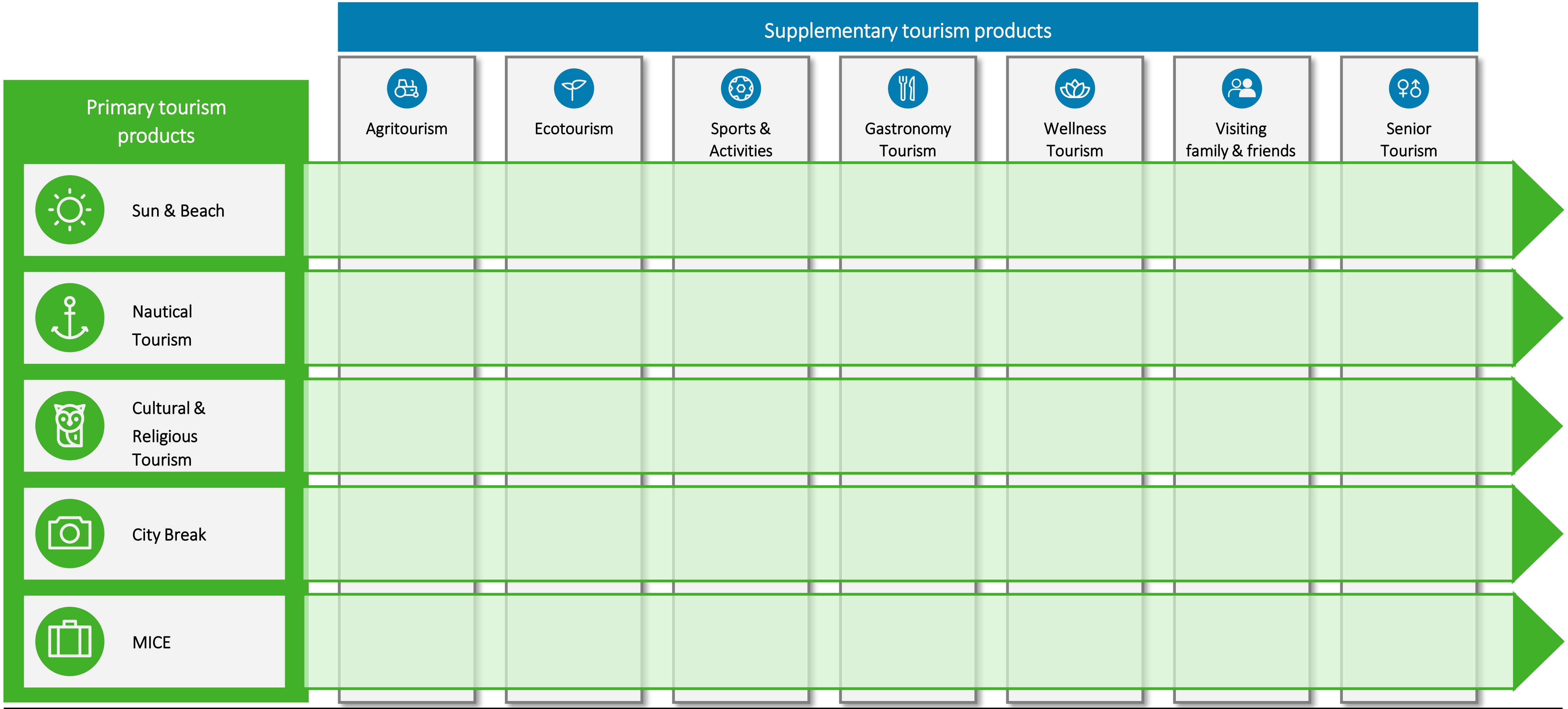
- Deliverable D1: Methodology for undertaking consultation with agencies per Region
- Deliverable D7: Detailed Plan for the Realization of the Project, Deliverable D8: Bimonthly Project Progress Report, Deliverable D9: Project Quality Assurance Plan and Deliverable D10: Project Risk Assessment Plan.

In order to collect useful material for the purposes of the Project's analyses and encourage the participation of a considerable number of organizations, agencies and market players active in the tourism and hospitality sector, the following were undertaken:

- **Electronic consultation via a platform** (>240 questionnaires) in line with the methodology prescribed in Deliverable D1
- **Consultation with agencies and departments** related to Tourism from **all Regions** in Greece
- **Consultation with selected business associations and key stakeholders** of the Greek tourism industry.

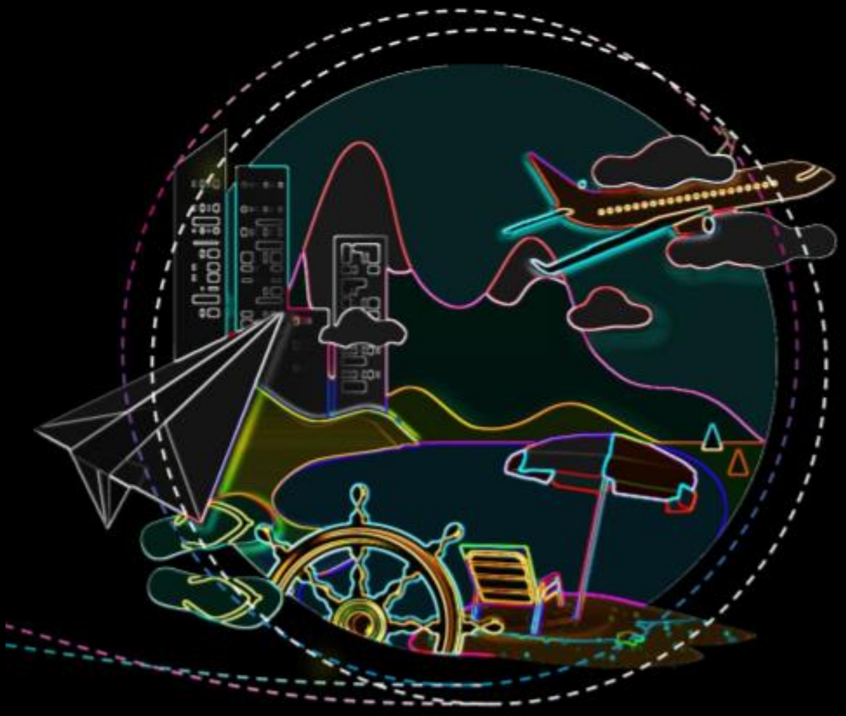
# Portfolio of Greece's tourism products

According to the National Tourism Strategic Plan, the country's portfolio of tourism products consists of the following 5 primary and 7 supplementary tourism products. The latter either supplement and enhance the visitor's experience (enablers) or address specific market segments (niche).




- The key goal of the Project was to identify and develop the appropriate primary and supplementary products in the selected indicative destinations in order to achieve some of the key strategic priorities for Greek tourism (a better distribution of tourism activity throughout Greece, season extension, increase of the average expenditure per overnight stay, extension of the average duration of stay etc.).

# Current trends & challenges for the global tourism industry



# Overview of current trends and challenges for the global tourism industry

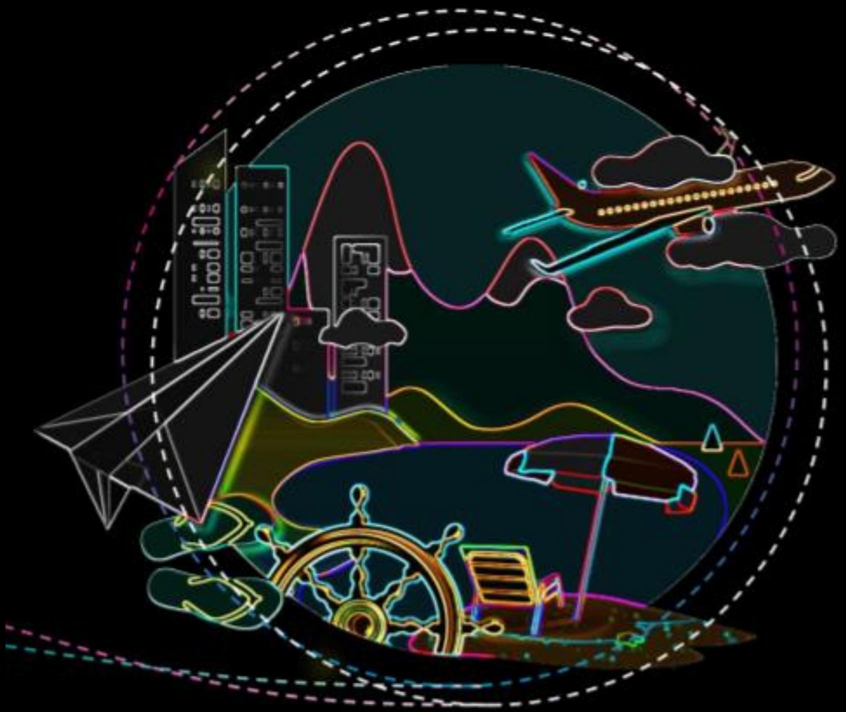
The digital transformation, sustainable development & sustainability, overtourism, the sharing economy, social and demographic changes, emerging destinations, safety & crisis management, and the new coronavirus (COVID-19) are the key trends and challenges for the global tourism industry and, hence, for Greek tourism.

# Indicative ways to address current trends & challenges

The key responses and best practices adopted by competing destinations to address the current trends and challenges for the tourism industry are shown below.

| | |
|---|---|
| Digital transformation | • Support mechanisms and programmes to provide resources, skills and know-how with a view to adopting new technologies and smart tourism practices in order to expedite the digital transformation and to enhance the tourism experience<br>• Development of comprehensive online platforms to advertise and promote tourism products by tourism organizations |
| Sustainable development & sustainability | • National sustainable development initiatives and certification programmes for destinations and businesses which use best practices in the sustainability domain in order to achieve more effective advertising and promotion and to develop partnerships |
| Overtourism | • Steps and policies for the geographic and seasonal distributiion of visits to less popular destinations<br>• Imposition of taxes / fines to address instances of overtourism, regulatory measures for tourist traffic, accommodation supply and tourism activities in popular areas / places of interest |
| Sharing economy | • Regulatory and legislative framework for the sharing economy in order to ensure free and fair competition conditions and the safety of residents and tourists<br>• Recording and monitoring of accommodation and tourism services offered through sharing economy platforms |
| Social & demographic changes | • Customization of tourism products and services, appropriate adjustment and upgrading of tourism infrastructures, and redesign of tourism advertising & promotion strategies with the use of digital media and with a focus on the preferences, needs, and requirements of each tourist category / profile |
| Emerging destinations | • Comprehensive strategic plans and actions for the development, advertising & promotion of the tourism product in non-traditional tourism "hotspots", emerging destinations, and "secondary towns and cities" |
| Safety & crisis management | • Mechanisms and measures for the preparation and effective management of potential future crises<br>• Immediate restart of tourism through the creation of a safety context and development and implementation of an appropriate communication strategy for the effective advertising & promotion of destinations |
| The new coronavirus (COVID-19) | • Support of the recovery of tourism and of domestic tourism with a focus on the economic support and protection of employment in impacted tourism businesses in order to address the effects and consequences of the new coronavirus (COVID−19)<br>• Initiatives to inform the sector and public-private partnerships in order to establish and implement effective health and safety protocols |

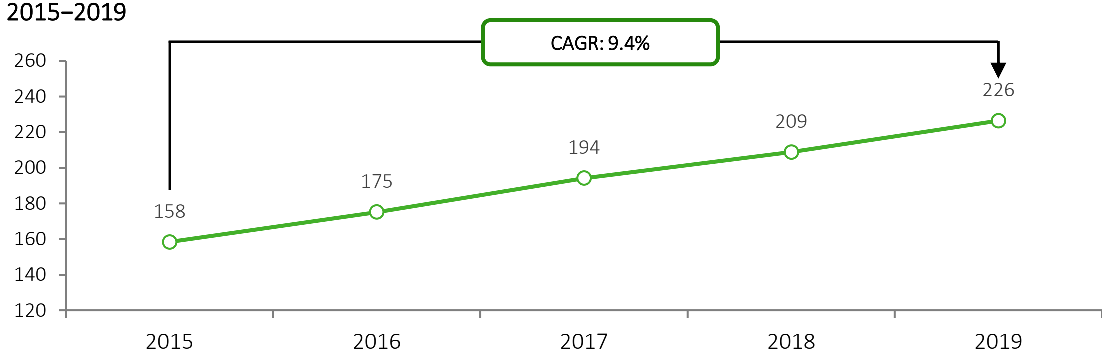
# Current trends per tourism product



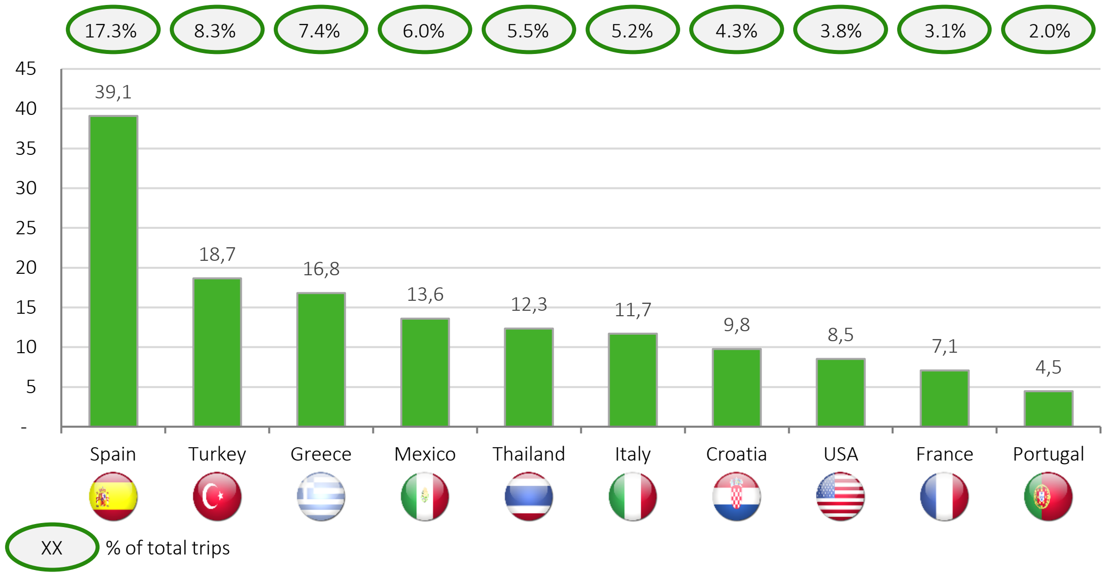
# Sun & Beach | Overview

Demand for the Sun & Beach tourism product showed considerable increase in the last four years (CAGR 9.4%), with Spain being the most popular destination. Travellers / consumers of the Sun & Beach product increasingly require unique / authentic experiences which combine multiple tourism products and sustainability practices.

International demand for the Sun & Beach product, in millions of trips, 2015–2019




Top Sun & Beach destinations, in millions of trips and % of total, 2019




Sources: World Travel Monitor®; IPK International, 2019, CBI | UK Ministry of Foreign Affairs, Deloitte Analysis

## General information

**Main distribution channels**

- Major & established mass tourism tour operators (e.g. TUI, FTI, DER Touristik)
- Major & established OTAs (e.g. Booking, Expedia)

**Key trends**

- Combination of Sun & Beach with alternative and thematic tourism products
- Links with agri-food / primary sector
- Adoption and advertising & promotion of sustainability practices by tourism product providers and destinations
- Advertising & promotion of destinations in targeted markets / customers through modern digital media

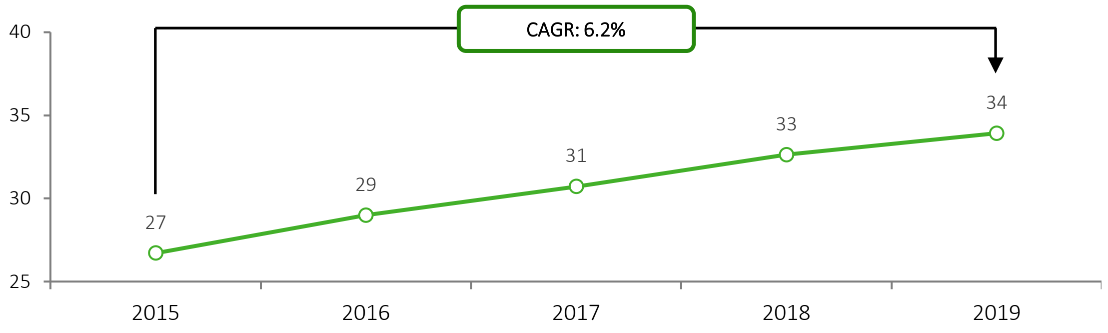
## Indicative successful cases

- "Accessible Beach, Beach for All" programme
- Smart Tourism | Málaga
- World of Glamping

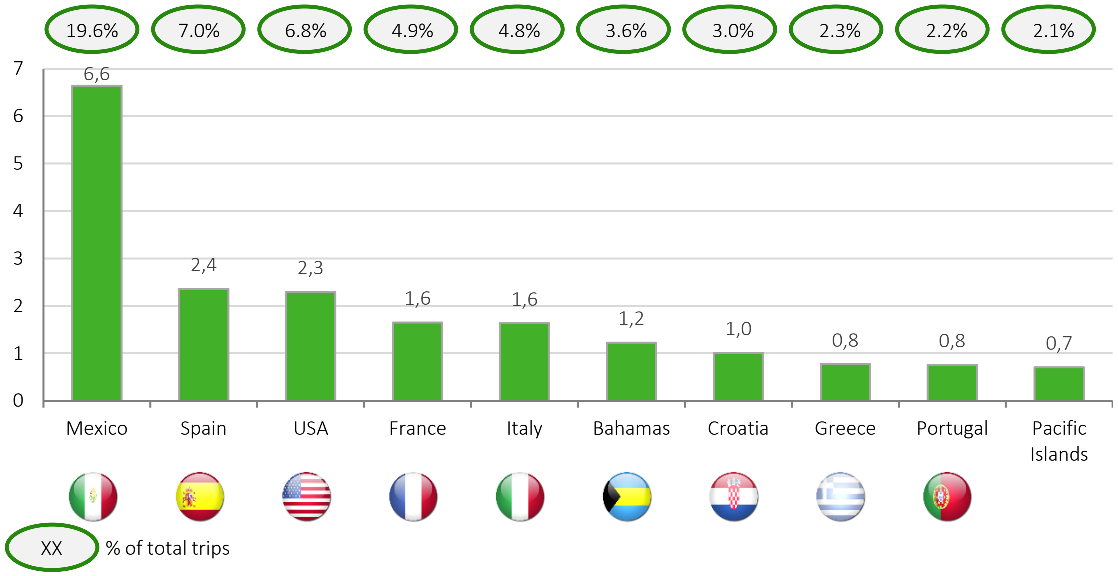
# Nautical Tourism | Overview

Demand for Nautical Tourism had the lowest growth rate compared to the other primary tourism products in the last four years (CAGR 6.2%), with Mexico being the most popular destination.

International demand for Nautical Tourism, in millions of trips, 2015–2019




Top Nautical Tourism destinations, in millions of trips and % of total, 2019




Sources: World Travel Monitor®; IPK International, 2019, Deloitte Analysis

## General information

**Main distribution channels (yachting)**

- Direct reservations through boat chartering, management and trading companies
- Specialist OTAs and agents (e.g. Sailogy, Sunsail)
- Thematic platforms (e.g. Tourradar, Travelopia)
- Sharing economy platforms (e.g. Borrow a Boat and Click & Boat)

**Main distribution channels (cruises)**

- Direct reservations through cruise lines
- Established mass tourism tour operators (e.g. TUI Cruises)
- OTAs
- Specialist OTAs (e.g. Planet Cruise)

**Key trends**

- Upgrading and creating port infrastructures & services (e.g. destination marinas, new and innovative services, superyacht infrastructures, utilization of digital technology, sustainable design) in order to enhance the customer's experience and cater to the needs of specific clientele / boat segments (e.g. large cruise ships)

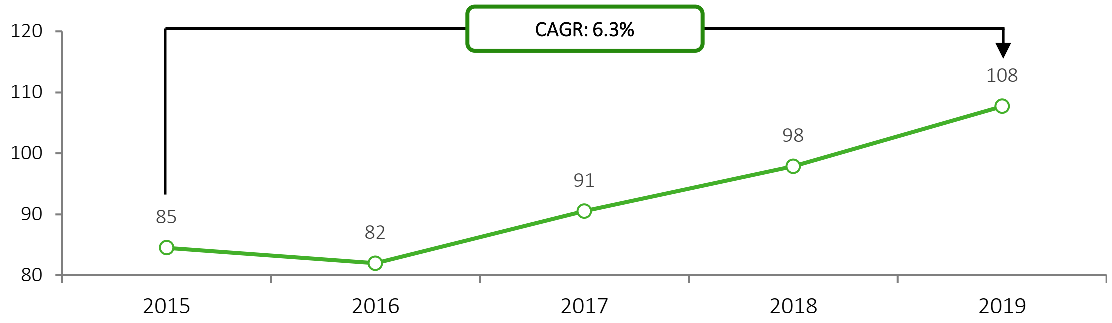
## Indicative successful cases

Marine Terminals

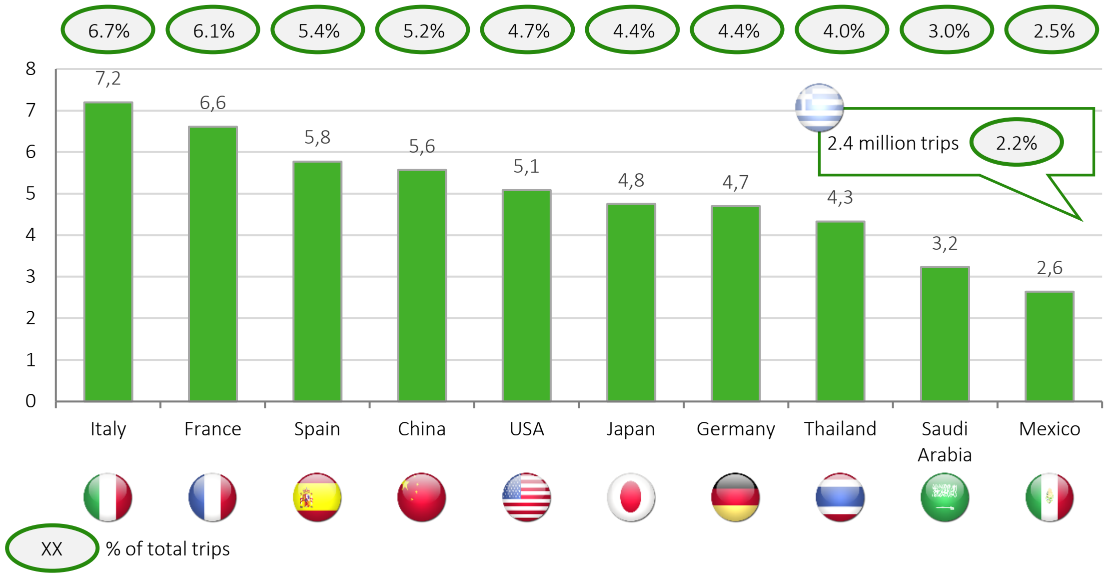
# Cultural & Religious Tourism | Overview

Cultural & Religious Tourism is the only primary tourism product which did not show a constant increase in the last four years (~3% drop in 2016, CAGR 6.3%), with Italy being the most popular destination. Tourists require a genuine and customized experience in order to be exposed to local customs and appreciate the cultural and religious traditions.

International demand for Cultural & Religious Tourism, in millions of trips, 2015–2019




Top Cultural & Religious Tourism destinations, in millions of trips and % of total, 2019




Sources: World Travel Monitor®; IPK International, 2019, CBI | UK Ministry of Foreign Affairs, UNWTO, Global Data, Deloitte Analysis

## General information

**Main distribution channels**

- Major & established mass tourism tour operators (mainly TUI)
- Specialist tour operators, e.g. Globus
- Specialist OTAs, e.g. Culture Trip

**Key trends**

- Advertising & promotion of cultural resources in targeted markets / clientele segments through modern digital media
- Upgrading of infrastructures, services, and accessibility of destinations (e.g. use of digital technology, accessibility for people with disabilities)
- Holistic approach, promoting links with local agri-food, gastronomy, architecture and Ecotourism
- Promotion of cross-border cultural tourism in order to enhance visitors' experience
- Responsible and sustainable utilization of cultural heritage

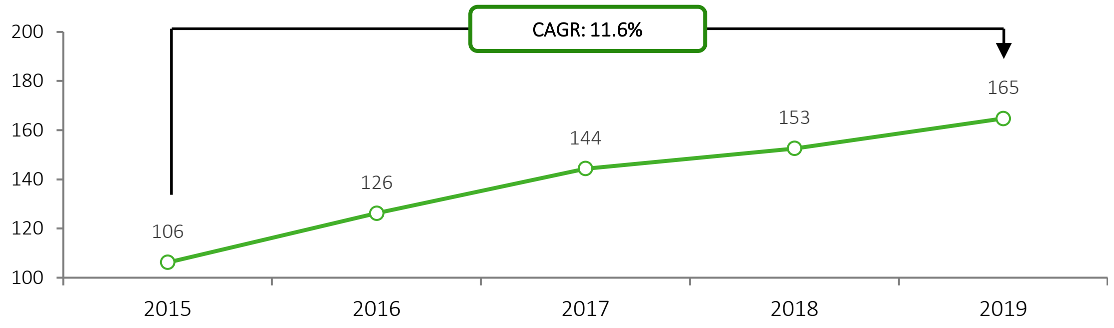
## Indicative successful cases

- "Fortress promotion – Border fortresses" Programme
- Paths of faith
- Accessibility to cultural monuments
- Omnia Card

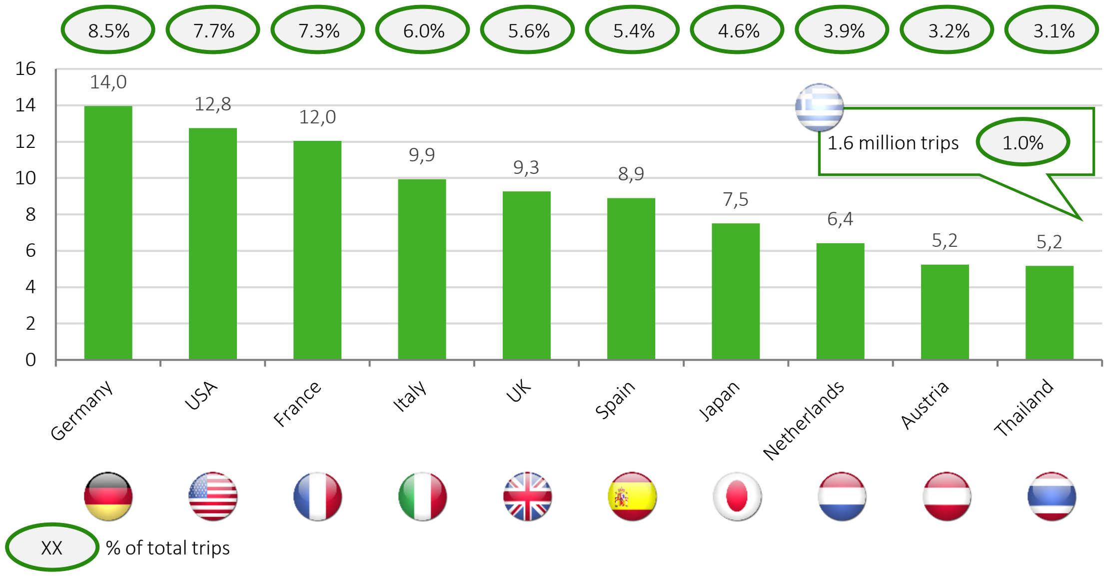
# City Break | Overview

Demand for City Break grew rapidly in the last four years (CAGR 11.6%), with Germany being the most popular destination. The combination of a broad range of cultural activities and leisure activities / experiences provides the key driver for the selection of a City Break destination.

International demand for City Break, in millions of trips, 2015–2019




Top City Break destinations, in millions of trips and % of total, 2019




## General information

### Main distribution channels

- Direct reservations, major & established mass tourism tour operators (e.g. TUI, JET2CityBreaks)
- Major & established OTAs (e.g. Booking, Expedia)
- Sharing Economy Platforms (e.g. Airbnb)

### Key trends

- Easy and direct accessibility and connectivity
- High level of public infrastructures and services
- Broad range and high level of activities / experiences (mainly cultural and leisure activities)
- Innovative and thematic City Break infrastructures
- Advertising & promotion of destinations in specific markets / clientele segments (e.g. millennials, Gen Z) through modern digital media

## Indicative successful cases

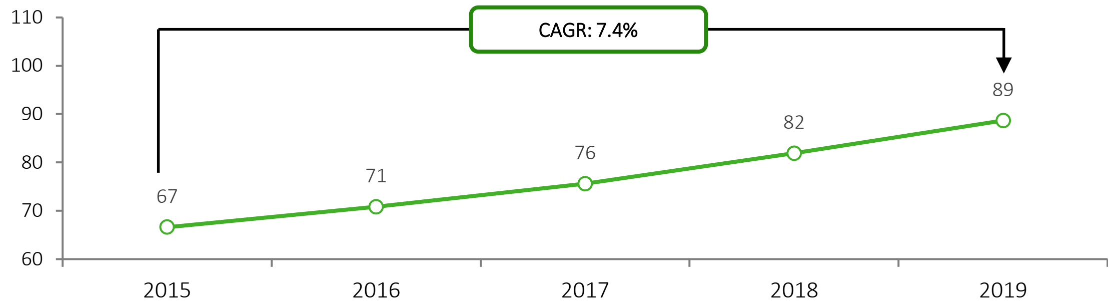
- VisitBarcelona tickets
- The case of Nice
- The case of Jerusalem
- The case of Lyon

Sources: World Travel Monitor®; IPK International, 2019, CBI | UK Ministry of Foreign Affairs, Managing overcrowding in tourism destinations | World Travel & Tourism Council, Deloitte Analysis

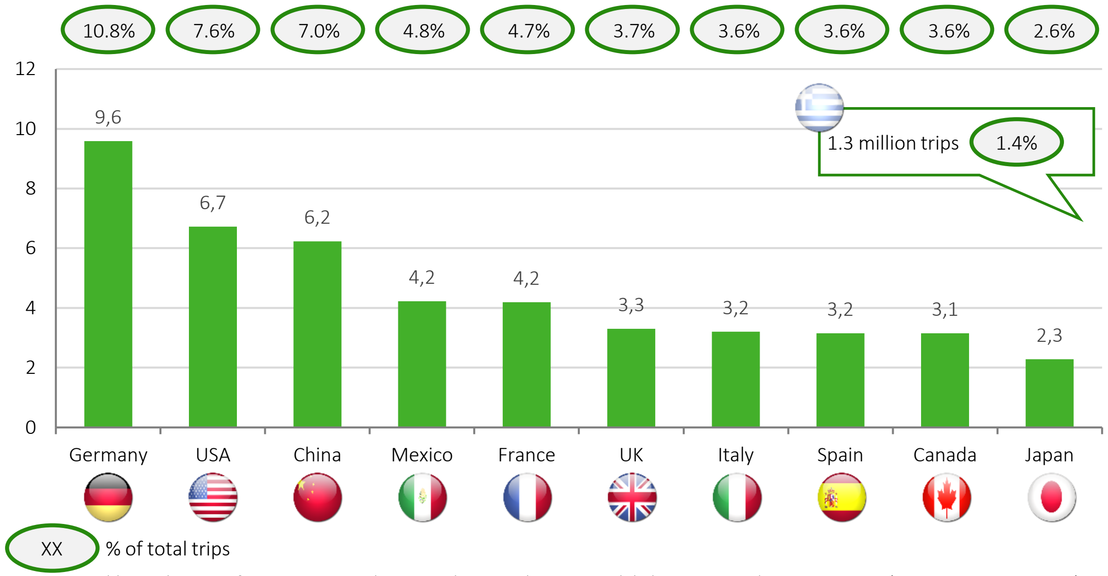
# MICE | Key information

## Demand for MICE grew in the last four years (CAGR 7.4%), with Germany being the most popular destination. The consequences of the new coronavirus (COVID-19) and technological developments are expected to prompt businesses in the sector to redesign their products and strategies.

International demand for MICE, in millions of trips, 2015–2019




Top MICE destinations, in millions of trips and % of total, 2019




Sources: World Travel Monitor®; IPK International, 2019, Deloitte Analysis, 2020 Global Meetings and Events Forecast | American Express, CBI | UK Ministry of Foreign Affairs, Deloitte Analysis

### General information

The COVID-19 pandemic is expected to have a negative impact on the demand for business travel, with companies focusing on smaller-scale conferences and closer destinations.

**Main distribution channels**

- Specialist tour operators, e.g. BCD travel and CWT
- Professional Congress Organizers (PCOs)
- Specialist OTAs, e.g. Ctrip and Travel Leaders

**Key trends**

- Increase of the number of hybrid events
- Increased use of new and smart technologies
- Combination of business travel with incentive and leisure trips
- Innovative congress facilities with modern technological infrastructures
- Advertising & promotion of MICE destinations through the operation of conference organizers

### Indicative successful cases

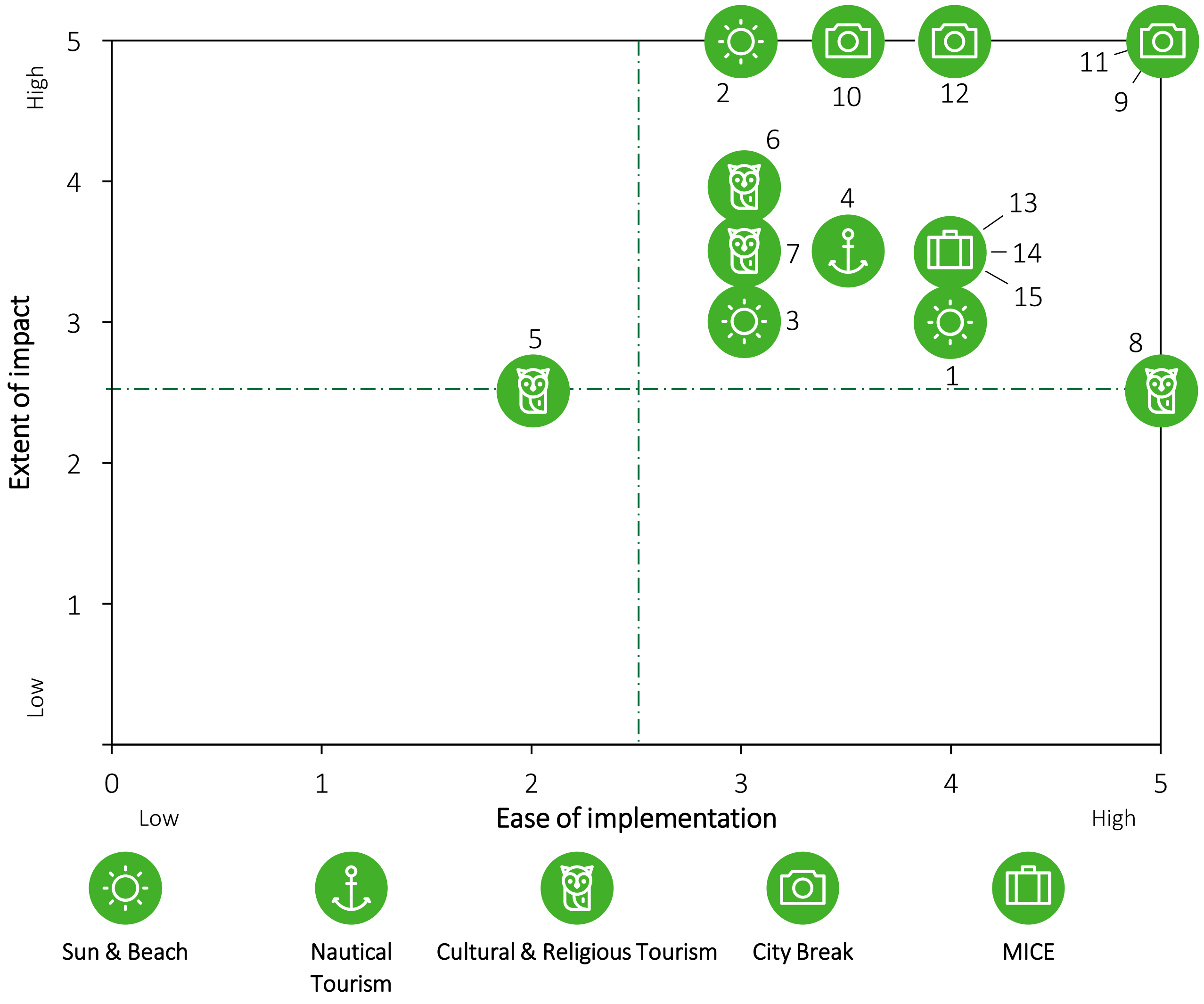
The case of Lisbon

The case of Barcelona

The case of Paris

# Key tourism products | brief overview of indicative successful cases

Below is a list of the indicative successful cases which were examined in the context of the Project, classified by primary tourism product and taking into account the ease of their implementation and the extent of their impact on Greek tourism.




| Tourism product | International best practices |
|---|---|
| 1. Sun & Beach | "Accessible Beach, Beach for All" programme |
| 2. Sun & Beach | Smart Tourism \| Málaga |
| 3. Sun & Beach | World of Glamping |
| 4. Nautical Tourism | Marine Terminals |
| 5. Cultural & Religious Tourism | "Fortress promotion – Border fortresses" Programme |
| 6. Cultural & Religious Tourism | Paths of faith |
| 7. Cultural & Religious Tourism | Accessibility to cultural monuments |
| 8. Cultural & Religious Tourism | Omnia Card |
| 9. City Break | VisitBarcelona tickets |
| 10. City Break | The case of Nice |
| 11. City Break | The case of Jerusalem |
| 12. City Break | The case of Lyon |
| 13. MICE | The case of Lisbon |
| 14. MICE | The case of Barcelona |
| 15. MICE | The case of Paris |

# Agritourism | Overview

Increased Internet use, travellers' needs for unique and genuine experiences which incorporate aspects of local tradition and interaction with the local community and which facilitate a detachment from technology, along with an interest in agricultural production, are the key drivers for the rise in Agritourism.

## Product description

- Agritourism pertains to the tourism product which allows visitors to experience / participate in the activities / practices, in the traditions, and in the lifestyle of local agricultural communities.
- It is closely linked to Adventure Tourism, Ecotourism, and Cultural & Religious Tourism.
- Consumers usually have a higher education, come from a higher socio-economic level, and have plenty of travel experience.

### Stays in agri-accommodation

- Campsites or tents
- Community hostels
- Family hostels
- Farms
- Local families
- Agri- bed & breakfast or small hotels

### Agri- / Eco- activities

- Animal watching
- Boat trips
- Hiking or bicycling
- Horse riding
- Tours / excursions (e.g. to villages, wineries, farms)
- Interactive workshops (e.g. handicraft or cooking)

### Key places of interest

- Archaeological sites / cultural places of interest / centres and museums
- Cultural and gastronomic heritage and other routes / paths
- Wildlife sanctuaries
- Farmers' / Artisans' associations
- (Street) markets

## Additional information

**Key drivers for the rise in Agritourism**

1. Need to integrate local culture and tradition aspects in a trip
2. Need for unique and genuine experiences linked to local lifestyle and the local community
3. Need to detach oneself from technology, spend time with one's family, and reconnect with the natural environment and tradition
4. Increased interest and respect for the source and method of production of food products
5. Use of technology tools to seek information about tourism products and experiences and to plan a trip

**Best practices**

- Specialist travel agencies
- Certification of agritourism accommodation
- Agritourism providers' and producers' partnerships / networks

## Indicative successful cases

- Ecoagrotours
- Agriturismo Italia
- Bienvenue à la ferme network

Sources: CBI | UK Ministry of Foreign Affairs, Deloitte Analysis

# Ecotourism | Overview

Ecotourism is a specialized product which combines activities / experiences of Adventure Tourism, Agritourism, Sports & Activities Tourism, and Cultural & Religious Tourism with sustainability, awareness and protection of the environment. It is expected to grow, as consumers turn to more sustainable forms of tourism.

## Product description

- Ecotourism, a specialized part of Nature Tourism focusing on natural places of interest, provides a responsible journey aimed at exploring and becoming acquainted with the natural environment and the flora and fauna at the destination, protecting the environment, and improving the quality of life of local community residents.
- It is closely linked to Adventure Tourism, Agritourism, Sports & Activities Tourism, and Cultural & Religious Tourism, depending on the destination's infrastructures, climate, and places of interest.

### Ecotourism Activities

- Nature tours (e.g. national parks, volcanoes)
- Flora and fauna watching (e.g. birdwatching / whale watching)
- Angling / fishing
- Hunting
- Bicycling
- Hiking
- Speleology
- Horse riding
- Diving and snorkelling
- Safari
- Observing the stars
- Winter sports
- Excursions to archaeological sites / historical monuments and attending local festivals / fairs
- Camping
- Getting to know the locals
- Staying in traditional / natural accommodation

### Clientele groups

**Senior Ecotourists**
- People in the 50-70 age group, with ample time and income for travelling, with a higher education
- They seek genuine and unique experiences, luxury and comfort, and are willing to pay (e.g. staying in luxury ecolodges)

**Young Ecotourists**
- People in the 25-50 age group, with limited time and income, professionals, with a higher education and increased environmental awareness

## Additional information

### Consumer preferences

- The primary growth driver for Ecotourism is the travellers' turn to a more sustainable consumption model.

### Main distribution channels

- Travel agencies for Senior and Adventure Tourism
- Travel agencies for Ecotourism
- Online Travel Agencies (OTAs)
- Specialist online travel agencies
- Direct sales (local businesses, DMCs)

### Best practices

- Implementation of sustainability practices
- Certification of product providers
- Digital platforms for advertising & promoting Ecotourism products and experiences

## Indicative successful cases

- Ceres EcoLabel
- Green Scheme of Slovenian Tourism (GSST)
- WILDSEA Europe

Sources: CBI | UK Ministry of Foreign Affairs, Booking.com, Deloitte Analysis

# Sports & Activities Tourism | Overview

Sports & Activities Tourism is a specialized tourism product which involves Adventure Tourism, Sports Events Tourism and Training Camps.

## Περιγραφή προϊόντος

### Adventure Tourism

- A travel style which takes people out of their normal surroundings for over twenty-four hours – but not longer than one year– and involves at least two of the following three experiences: physical activity, visits in nature, and cultural pursuits
- It may include outdoor sports activities, winter / ski tourism, and general aviation
- The size of the Adventure Tourism market in 2019 was $678 million
- It is divided into mild and extreme adventure tourism

### Sports Events & Training Camps

- **Sports Events Tourism:** It involves both tourists travelling to attend sports events as spectators, who match the timing of their holiday with specific sports events, and teams of athletes, individual athletes, delegations, technical staff, and journalists, who travel to participate in sports events and extend their stay at the location where the sports event is held.
- **Training Camps:** It involves visits by professional and/or amateur teams / athletes to a location, primarily driven by their participation in preparation and treatment programmes mainly held at Sports Training Camps.

## Additional information

### Consumer preferences and key trends

- Consumers' turn to health and wellness, immersion trips, and contact with nature
- High commercialization and increased consumer interest in international sports events
- This tourism product is a key pillar in the strategic planning for the tourism development of competing destinations (e.g. Slovenia, Catalonia, Portugal)

### Best practices

- High-quality infrastructures for Sports and Adventure Tourism (e.g. specialist / public sports infrastructures, accommodation, trail and bike route marking)
- Certifications
- Specialist digital platforms for advertising & promoting the product
- Successful organization and hosting of sports events with a worldwide appeal

## Indicative successful cases

- Sports & Activities Tourism Label | Catalonia
- The case of Portugal
- The case of Slovenia

Sources: Greek Ministry of Tourism, Adventure Travel Trade Association, UNWTO, Indescat, Slovenian Tourist Board, Allied Market Research

# Gastronomy Tourism | Overview

Gastronomy Tourism is a supplementary product which pertains to the participation in gastronomic experiences / activities and gains increasing importance as a factor which enhances the tourism product.

## Product description

- It is the holistic activity which emanates from the participation of visitors in gastronomic experiences, as a horizontal element which enriches and enhances all forms of the tourism product.
- Wine tourism involves the provision of hosting, guided tour, hospitality, and catering services in sites which are linked to winemaking and / or wine producing (vineyards) facilities. These services are provided in combination with activities related to viniculture and winemaking.
- The global Gastronomy Tourism market came to $1.1 trillion in 2019 and is expected to reach $1.3 trillion in 2025, after its shrinkage to $607 billion in 2020 as a result of the impact of the new coronavirus (COVID-19) pandemic.

**Growth trends**

- Shift of consumer habits & company practices towards sustainability
- Provision of customized services and turn to genuine, immersion experiences which include healthy diet and creative local cuisine approaches
- Increasing partnerships between the agri-food sector and tourism
- Association of genuineness with traditional and modern local products and delicacies, and engagement of chefs as ambassadors of tourism destinations for advertising and promotion purposes
- Highest ranking of cities (and street food) among gastronomy tourists' preferences
- Developing gastronomy as a key aspect of the tourism experience for younger generations of travellers and showcasing & promotion of products and delicacies on Instagram
- Enhancement of access to local products via urban farms and higher integration of technology in restaurant facilities
- Extension of the provision of gastronomic experiences in residents' homes through sharing economy platforms
- Specialized strategies to enhance Gastronomy Tourism by national / regional tourism organizations and implementation of programmes for the development of comprehensive Gastronomy Tourism products in collaboration with tourism, agri-food associations and businesses

## Additional information

**Best practices**

- Establishment of a gastronomic identity
- Certifications / quality labels
- Gastronomic experiences
- Local products
- Digital tools / platforms
- Thematic infrastructures

## Indicative successful cases

- The case of Catalonia
- The case of Slovenia
- Action Plan for Portugal's Wine Tourism

Sources: World Food Travel Association, Gastronomy as a Driver to Enhance Travellers' Experience and Upgrade the Tourism Product | INSETE

# Wellness Tourism | Overview

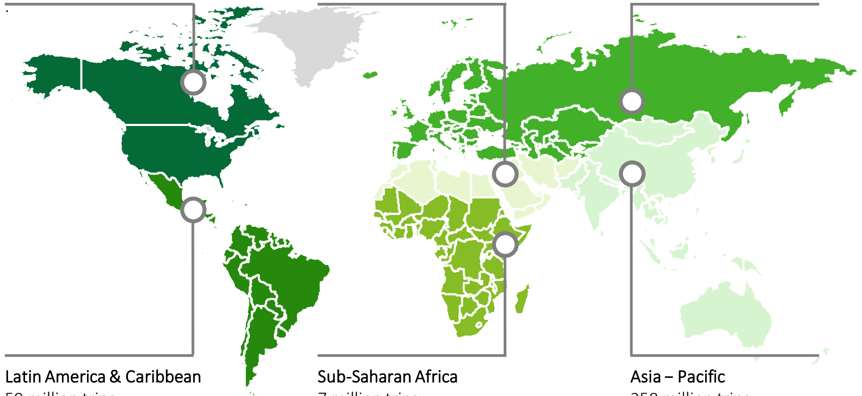
## Wellness Tourism is on a constant growth path and trend, and some of its aspects are being integrated in the value proposal of most tourism products. Europe has the greatest number of wellness trips worldwide, with France, Italy, and Spain being the top Mediterranean destinations.

### Wellness Tourism per region and top European destinations, number of trips and amount spent, 2017

North America
204 million trips
$241.7 billion spent

Middle East & N. Africa
11 million trips
$10.7 billion spent

Europe
292 million trips
$210.8 billion spent



Latin America & Caribbean
59 million trips
$234.8 billion spent

Sub-Saharan Africa
7 million trips
$4.8 billion spent

Asia – Pacific
258 million trips
$136.7 billion spent

| Germany | France | Austria | UK | Italy |
|---|---|---|---|---|
| 66.1 million trips | 32.4 million trips | 16.8 million trips | 23.2 million trips | 13.1 million trips |
| $65.7 billion spent | $30.7 billion spent | $16.5 billion spent | $13.5 billion spent | $13.4 billion spent |
| **Switzerland** | **Spain** | **Turkey** | **Russia** | **Portugal** |
| 9.7million trips | 18.8 million trips | 9.1 million trips | 15.8 million trips | 4.6 million trips |
| $12.6 billion spent | $9.9 billion spent | $4.4 billion spent | $4.0 billion spent | $3,4 billion spent |

### Wellness Tourism Revenue, 2017

- Accommodation: Hotels, resorts, camping, spa & health resorts **$130.5 billion**
- Food & Drinks: Restaurants, bars, snack bars, organic cuisine **$111.5 billion**
- Shopping: Souvenirs, clothes, artwork, spa products, sports gear and food products, supplements **$98.3 billion**
- Activities: Museums, excursions, spas, thermal springs, exercise, meditation, life coaching **$99.7 billion**

Domestic transport (air travel, trains, vehicle rentals, public transport, taxis) **$111.5 billion**

Other services (telephone, insurance, travel agencies, concierge) **$89.5 billion**

Sources: Global Wellness Economy Monitor – October 2018 | Global Wellness Institute, diaNEOsis Research & Policy Institute, Deloitte Analysis

### Additional information

Wellness travellers may be divided in two main groups:

- primary wellness tourists, who see wellness as the primary and sole reason / driver when selecting their destination;
- secondary wellness tourists, who wish to include wellness or participate in wellness activities in the course of their trip (89% of trips and 86% of money spent on wellness tourism).

**Consumer preferences and key trends**

- Growing middle class
- Desire to adopt a lifestyle which is in line with wellness
- Rising interest in immersion travel
- Integration of wellness aspects and experiences in the products and services of tourism providers
- Link of Wellness Tourism in Europe with thermal springs / spas

**Best practices**

- Comprehensive and certified wellness product
- Chains of thermal springs / spas
- Specialist hotel brands

### Indicative successful cases

- The case of Switzerland
- Relais Termal
- Belvita Hotels & Vitalpina Hotels

# Senior Tourism | Overview

Senior Tourism is a secondary tourism product which is expected to grow considerably, mainly due to global demographic changes. In light of this, tourism businesses and destinations are adjusting their products, services, and infrastructures in order to cater to the needs of senior travellers.

## Product description

- The key components of Senior Tourism are:
  - Sports, e.g. bicycling, golf, skiing, horse riding, fishing, sailing, tours
  - Gastronomy, e.g wine tasting / local food and drinks tasting
  - Wellness, e.g. yoga, thermal springs, aromatherapy, sauna, therapeutic massage
  - Various art events and visits to cultural monuments / museums, archaeological sites, religious temples, and other cultural heritage places of interest
  - Nature trips and interaction with the local population and customs-traditions
  - Leisure activities, e.g. board games with peers, theatre
  - Health services and good transport services

| Senior Tourism (65+) Features in Europe | World | European | Non-European |
|---|---|---|---|
| Visitors (million) | 35.9 | 32.5 | 3.2 |
| Nights spent (million) | 344.8 | 314.4 | 30.5 |
| Amount spent (€ million) | 41,034 | 30,494 | 10,540 |
| Amount spent per trip / day (€) | 1,142 / 119 | 931 / 97 | 3,323 / 346 |
| Travel companions | 75% partner | 75% partner | 69% partner |
| Visitors' gender | 58% male | 60% male | 59% female |
| Family income | 55% higher | 53% higher | 67% higher |
| Education | 56% higher | 55% higher | 67% higher |
| Type of accommodation | 31% in 4* hotel | 31% in 4* hotel | 40% in 4* hotel |
| Duration of stay | 39% 4–7 nights | 40% 4–7 nights | 50% 8-15 nights |
| Top destinations | 23% Spain 11% Italy | 24% Spain 11% Italy | 17% UK 17% Spain |
| Holiday type | 32% Sun & Beach 19% City Break | 35% Sun & Beach 11% City Break | 38% Touring 25% City Break |

## Additional information

**Key growth drivers**

- Ageing population worldwide
- Growth of the silver economy, a significant factor for the attractiveness of senior tourism
- Medical care services at destinations (e.g. specialized geriatric care and healthcare system)

**Best practices**

- Incentives to senior citizens (e.g. subsidies, tax incentives) to travel to tourism destinations during the low season (and/or to relocate)
- Creation and promotion of special tourism packages for senior tourists in order to increase tourism demand in less developed destinations

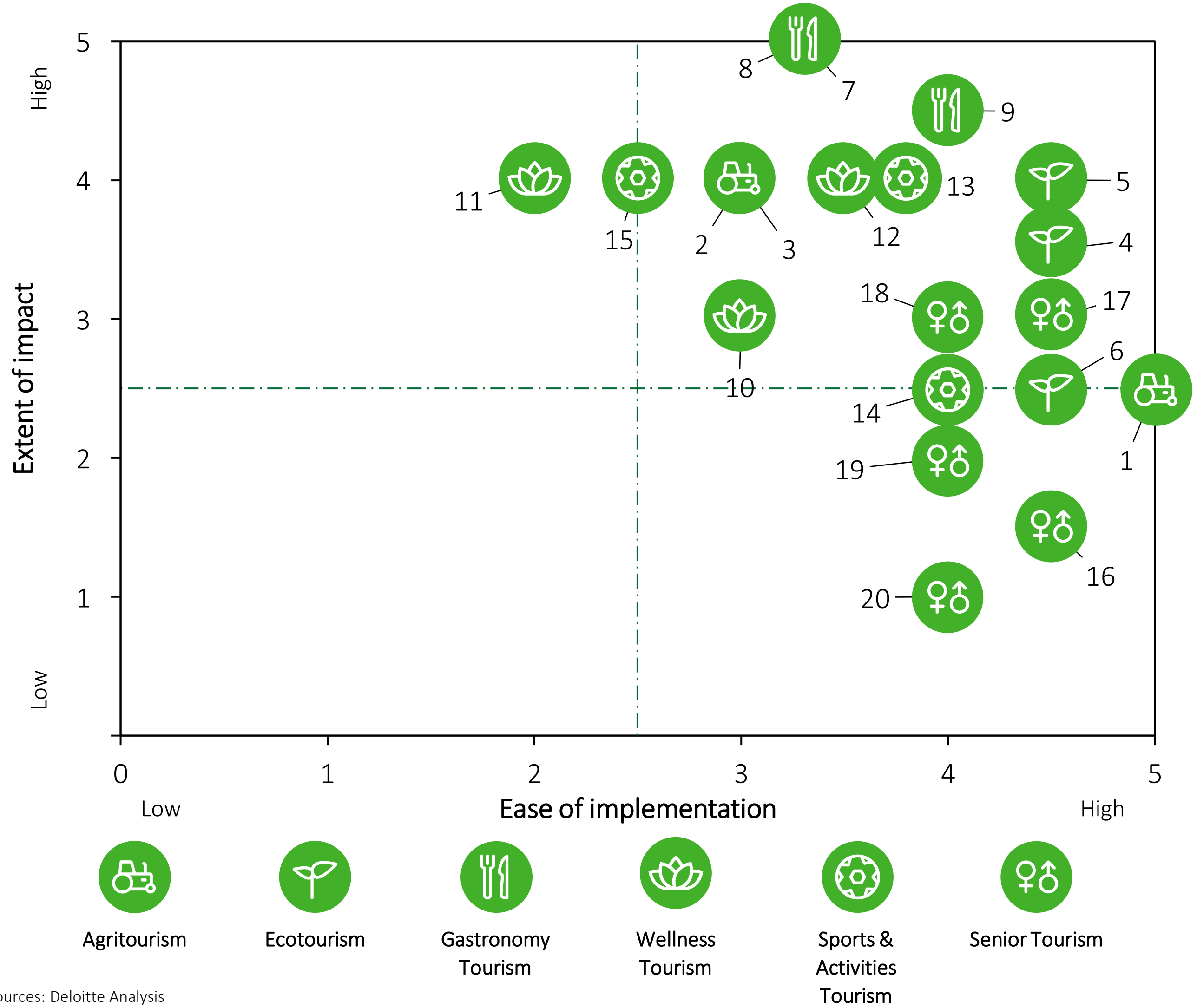
## Indicative successful cases

- SOWELL
- EU Senior Tourism Initiative
- LAKTIVE Programme
- Escape
- Tourage

Sources: Inbound senior holiday tourism profile in Europe, 2016 | INSETE, Tourism trends and ageing | Eurostat, CBI | UK Ministry of Foreign Affairs, diaNEOsis Research & Policy Institute, Deloitte Analysis

# Supplementary tourism products | brief overview of international best practices

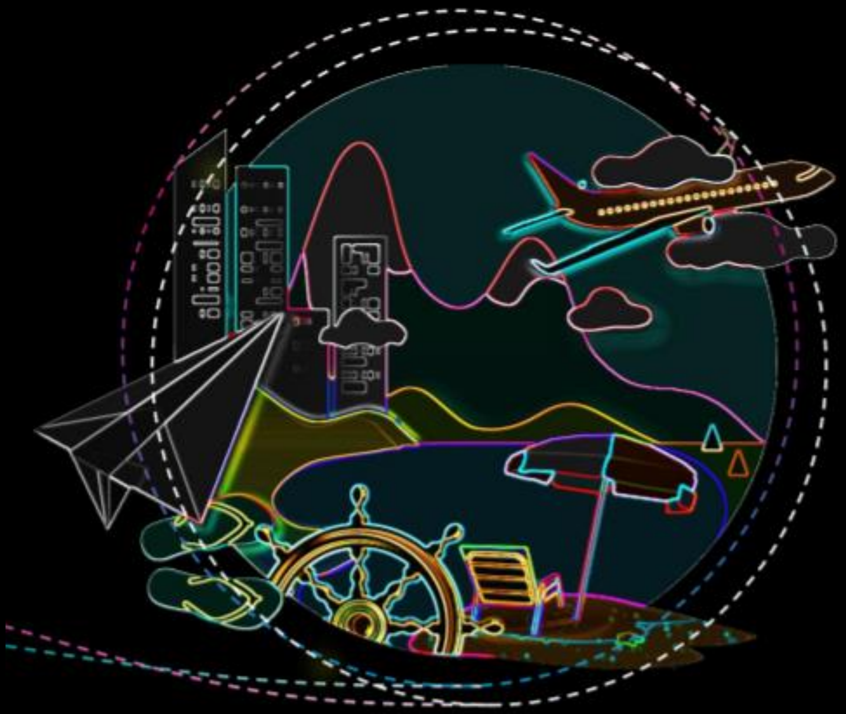
Below is a list of international best practices which were examined in the context of the Project, classified by supplementary tourism product and taking into account the ease of their implementation and the extent of their impact on Greek tourism.




| Tourism product | | International best practices |
|---|---|---|
| 1. | Agritourism | Ecoagrotours |
| 2. | Agritourism | Agriturismo Italia |
| 3. | Agritourism | Bienvenue à la ferme network |
| 4. | Ecotourism | Ceres EcoLabel |
| 5. | Ecotourism | Green Scheme of Slovenian Tourism (GSST) |
| 6. | Ecotourism | WILDSEA Europe |
| 7. | Gastronomy Tourism | The case of Catalonia |
| 8. | Gastronomy Tourism | The case of Slovenia |
| 9. | Gastronomy Tourism | Action Plan for Portugal's Wine Tourism |
| 10. | Wellness Tourism | The case of Switzerland |
| 11. | Wellness Tourism | Relais Termal |
| 12. | Wellness Tourism | Belvita Hotels & Vitalpina Hotels |
| 13. | Sports & Activities Tourism | Sports & Activities Tourism Label \| Catalonia |
| 14. | Sports & Activities Tourism | The case of Portugal |
| 15. | Sports & Activities Tourism | The case of Slovenia |
| 16. | Senior Tourism | SOWELL |
| 17. | Senior Tourism | EU Senior Tourism Initiative |
| 18. | Senior Tourism | LAKTIVE Programme |
| 19. | Senior Tourism | Escape |
| 20. | Senior Tourism | Tourage |

Sources: Deloitte Analysis

# Analysis of key international markets



# Primary tourism products | Worldwide

According to IPK data for 2019, 21.8% of outbound tourism worldwide was for Sun & Beach tourism, followed by City Break and Cultural Tourism, with 15.9% and 10.4% respectively.

## Top 10 countries of origin per tourism product worldwide, based on the number of trips for 2019

### Sun & Beach

Number of trips: 226,368 thousand

| Country | No. of trips (thousand) | % of total |
|---|---|---|
| 1. Germany | 30,062 | 13.3% |
| 2. United Kingdom | 23,225 | 10.3% |
| 3. China | 20,396 | 9.0% |
| 4. USA | 17,023 | 7.5% |
| 5. Russia | 13,944 | 6.2% |
| 6. France | 12,065 | 5.3% |
| 7. Canada | 7,470 | 3.3% |
| 8. Netherlands | 7,312 | 3.2% |
| 9. South Korea | 6,225 | 2.8% |
| 10. Italy | 5,704 | 2.5% |

### Nautical Tourism

Number of trips: 33,923 thousand

| Country | No. of trips (thousand) | % of total |
|---|---|---|
| 1. USA | 14,299 | 42.2% |
| 2. Germany | 2,772 | 8.2% |
| 3. United Kingdom | 2,188 | 6.5% |
| 4. China | 1,988 | 5.9% |
| 5. Canada | 1,781 | 5.3% |
| 6. Australia | 1,333 | 3.9% |
| 7. France | 756 | 2.2% |
| 8. Italy | 509 | 1.5% |
| 9. Japan | 488 | 1.4% |
| 10. Sweden | 370 | 1.1% |

### Cultural & Religious Tourism

Number of trips: 107,720 thousand

| Country | No. of trips (thousand) | % of total |
|---|---|---|
| 1. China | 9,738 | 9.0% |
| 2. USA | 9,210 | 8.6% |
| 3. Germany | 7,443 | 6.9% |
| 4. France | 6,108 | 5.7% |
| 5. United Kingdom | 5,386 | 5.0% |
| 6. Russia | 4,632 | 4.3% |
| 7. South Korea | 3,899 | 3.6% |
| 8. Italy | 3,576 | 3.3% |
| 9. Spain | 3,501 | 3.3% |
| 10. Canada | 3,382 | 3.1% |

### City Break

Number of trips: 164,739 thousand

| Country | No. of trips (thousand) | % of total |
|---|---|---|
| 1. Germany | 12,751 | 7.7% |
| 2. United Kingdom | 12,322 | 7.5% |
| 3. China | 11,779 | 7.2% |
| 4. USA | 10,955 | 6.7% |
| 5. Italy | 7,216 | 4.4% |
| 6. South Korea | 7,150 | 4.3% |
| 7. Japan | 6,474 | 3.9% |
| 8. Canada | 6,458 | 3.9% |
| 9. France | 5,832 | 3.5% |
| 10. Spain | 5,469 | 3.3% |

### MICE

Number of trips: 88,655 thousand

| Country | No. of trips (thousand) | % of total |
|---|---|---|
| 1. USA | 12,314 | 13.9% |
| 2. China | 6,082 | 6.9% |
| 3. Germany | 4,805 | 5.4% |
| 4. United Kingdom | 4,335 | 4.9% |
| 5. India | 3,165 | 3.6% |
| 6. France | 2,943 | 3.3% |
| 7. South Korea | 2,651 | 3.0% |
| 8. Canada | 2,314 | 2.6% |
| 9. Taiwan | 2,128 | 2.4% |
| 10. Japan | 2,128 | 2.3% |

Sources: World Travel Monitor®; IPK International, 2019

# Most important emerging markets for Greek tourism | Primary tourism products

According to a comparative analysis among the most important markets worldwide and the top markets for Greek tourism, it is estimated that potentially the most important emerging markets for Greece are China, Canada, and South Korea.

**Top 10 countries of origin per primary tourism product worldwide, based on the number of trips for 2019**

| Ranking | Sun & Beach | Nautical Tourism | Cultural & Religious Tourism | City Break | MICE |
|---|---|---|---|---|---|
| 1. | Germany | USA | China | Germany | USA |
| 2. | UK | Germany | USA | UK | China |
| 3. | China | UK | Germany | China | Germany |
| 4. | USA | China | France | USA | UK |
| 5. | Russia | Canada | UK | Italy | India |
| 6. | France | Australia | Russia | S. Korea | France |
| 7. | Canada | France | S. Korea | Japan | S. Korea |
| 8. | Netherlands | Italy | Italy | Canada | Canada |
| 9. | S. Korea | Japan | Spain | France | Taiwan |
| 10. | Italy | Sweden | Canada | Spain | Japan |

Country which is not among the 10 top markets for Greek Tourism

1. Not including Nautical Tourism trips

Sources: World Travel Monitor®; IPK International, 2019, INSETE, Deloitte Analysis

## Potentially most important emerging markets for Greece

Comparing the most important markets worldwide for primary tourism products and the most important markets for Greek tourism, the potentially emerging markets for Greece to focus on are:

- **China – 50 million trips** (3rd in Sun & Beach, 4th in Nautical Tourism, 1st in Cultural & Religious Tourism, 3rd in City Break, 2nd in MICE)
- **Canada – 21.4 million trips** (7th in Sun & Beach, 5th in Nautical Tourism, 10th in Cultural & Religious Tourism, 8th in City Break, 8th in MICE)
- **South Korea – 19.9 million trips**[1] (9th in Sun & Beach, 7th in Cultural & Religious Tourism, 6th in City Break, 7th in MICE)
- Additional important markets with room for further enhancement:
  - Spain (9th in Cultural & Religious Tourism, 10th in City Break)
  - Japan (7th in City Break, 9th in Nautical Tourism, 10th in MICE)
  - India (5th in MICE)
  - Taiwan (9th in MICE)
  - Australia (6th in Nautical Tourism)

# Most important markets for Greek tourism | Penetration of Greece

Moreover, according to the comparative analysis, there is considerable room for enhancing Greece's market share in primary tourism products, both as a whole and in individual inbound tourism markets.

**Greece's market share[1] in the top countries of origin for Greek tourism per product and total market share for Greece, Spain, Italy, and Turkey per product on the basis of the number of trips**

| | Top inbound markets for Greek tourism | Sun & Beach | Nautical Tourism | Cultural & Religious Tourism | City Break | MICE |
|---|---|---|---|---|---|---|
| 1 | Germany | 9.1% | 2.4% | 1.8% | 2.0% | 3.4% |
| 2 | UK | 9.9% | 6.2% | 2.5% | 1.4% | 3.3% |
| 3 | France | 10.7% | 2.3% | 3.1% | 1.9% | 1.2% |
| 4 | Italy | 16.0% | 15.6% | 5.4% | 1.4% | N/A |
| 5 | Netherlands | 11.5% | *N/A* | *N/A* | *N/A* | *N/A* |
| 6 | Russia | 5.0% | *N/A* | 2.5% | *N/A* | *N/A* |
| 7 | USA | 0.9% | 1.4% | 2.5% | 1.0% | 0.6% |
| | Greece | 7.4% | 2.3% | 2.2% | 1.0% | 1.4% |
| 1 | Spain | 17.3% | 7.0% | 5.4% | 5.4% | 3.6% |
| 2 | Turkey | 8.3% | 1.4% | 2.1% | 1.4% | 1.9% |
| 3 | Italy | 5.2% | 4.8% | 6.7% | 6.0% | 3.6% |

Market share smaller than Greece's total market share; Greece's total market share; Share > Greece's share; Share < Greece's share

**Comments**

- According to an analysis of Greece's market share in each primary tourism product, it is estimated that room and opportunities to increase penetration exist in:
  - the Russian Sun & Beach market
  - the American Sun & Beach and MICE market
  - the German Cultural & Religious Tourism market
  - the French MICE market
- Moreover, it is estimated that room and opportunities to enhance penetration exist both for the less developed products of Nautical Tourism, Cultural & Religious Tourism, City Break, and MICE, and for the more saturated Sun & Beach product.

**Recommended key target markets for Greek tourism**

- Established and mature inbound tourism markets of Western Europe (e.g. Germany, United Kingdom, France)
- Important inbound tourism markets of Eastern Europe, with a focus on Russia
- Important emerging markets for world tourism, in particular China, India, and South Korea
- Strong and big markets of North America (USA, Canada)

1. Estimate of number of inbound trips in 2019 for the 10 top inbound tourism markets for Greece in 2017 per primary tourism product. Tourism products and types of trip match as follows: Sun & Beach – Waterside holiday at the sea / at a lake, Nautical Tourism – Cruise and Other boat holiday, Cultural & Religious – Tour holiday / round trip, City Break – City trip / Holiday in a city, MICE – MICE Business trips. No data are available to assess for the markets of Belgium, Poland, and Switzerland.

Sources: World Travel Monitor®; IPK International, 2019, INSETE, Deloitte Analysis

# Travellers' profile and key features of trips

Inbound tourism to Greece differs from the global primary tourism products market in the following parameters: smaller percentage of travellers in the 15-24 age group (29.6% compare to 36.3%), a higher education level (62.2% compared to 70.0%), and a greater use of travel agencies for reservations (37.7% compared to 30.3%).

| Travellers' profile and key features of trips | Global tourism products market in 2019 | | | | | | Inbound tourism to Greece market in 2017 | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Weighted Average | Sun & Beach | Nautical Tourism | Cult. & Relig. Tour. | City Break | MICE | World | Total Europe | Germany | UK | France | Italy | Netherlands | Russia | Poland | Belgium | Switzerland | Other Europe | Total non Europe | USA | Other non Europe |
| **Age** | | | | | | | | | | | | | | | | | | | | | |
| 15–24 years | 36.3% | 34.2% | 22.8% | 36.3% | 38.8% | 42.1% | 29.6% | 30.6% | 25.2% | 25.4% | 21.8% | 43.2% | 22.1% | 36.1% | 33.8% | 25.8% | 24.3% | 35.4% | 20.4% | 28.1% | 15.8% |
| 25-54 years | 42.8% | 42.3% | 30.9% | 42.2% | 43.5% | 47.9% | 42.4% | 42.1% | 44.1% | 36.2% | 40.3% | 36.8% | 36.5% | 45.2% | 50.4% | 42.6% | 48.4% | 43.9% | 45.1% | 39.9% | 48.3% |
| 55+ years | 20.9% | 23.6% | 46.4% | 21.5% | 17.6% | 10.0% | 28.0% | 27.2% | 30.7% | 38.4% | 38.0% | 20.0% | 41.5% | 18.7% | 15.9% | 31.8% | 27.2% | 20.6% | 34.4% | 32.0% | 35.8% |
| **Gender** | | | | | | | | | | | | | | | | | | | | | |
| Male | 52.6% | 51.1% | 47.9% | 48.2% | 52.0% | 64.5% | 50.5% | 50.7% | 52.3% | 48.2% | 41.7% | 47.3% | 45.7% | 48.5% | 53.1% | 49.0% | 43.2% | 54.6% | 48.5% | 51.6% | 46.5% |
| Female | 47.4% | 48.9% | 52.1% | 51.8% | 48.0% | 35.5% | 49.5% | 49.3% | 47.7% | 51.8% | 58.3% | 52.7% | 54.3% | 51.5% | 46.9% | 51.0% | 56.8% | 45.4% | 51.5% | 48.4% | 53.5% |
| **Income** | | | | | | | | | | | | | | | | | | | | | |
| Low income | 4.1% | 3.6% | 3.7% | 3.8% | 5.1% | 3.9% | 3.5% | 3.7% | 4.5% | 3.4% | 2.2% | 5.3% | 4.8% | 0.1% | 1.8% | 3.3% | 3.4% | 4.1% | 1.6% | 0.5% | 2.2% |
| Medium to low income | 12.3% | 12.4% | 11.1% | 14.8% | 12.1% | 10.1% | 13.9% | 14.2% | 10.1% | 18.6% | 11.3% | 18.9% | 9.3% | 12.4% | 4.6% | 14.9% | 13.1% | 15.9% | 10.9% | 10.3% | 11.3% |
| Medium to high income | 23.5% | 23.4% | 21.5% | 24.7% | 24.0% | 22.0% | 23.7% | 23.8% | 22.3% | 29.5% | 24.4% | 25.1% | 23.2% | 16.2% | 26.0% | 29.8% | 14.4% | 22.7% | 22.5% | 23.2% | 22.1% |
| High income | 60.1% | 60.7% | 63.7% | 56.8% | 58.8% | 64.0% | 58.9% | 58.3% | 63.1% | 48.5% | 62.1% | 50.7% | 62.7% | 71.3% | 67.6% | 52.1% | 69.1% | 57.3% | 64.9% | 65.9% | 64.3% |
| **Education** | | | | | | | | | | | | | | | | | | | | | |
| Lower | 5.6% | 7.6% | 8.1% | 2.9% | 5.5% | 3.2% | 7.4% | 7.9% | 5.5% | 16.1% | 7.1% | 3.8% | 2.2% | 0.5% | 2.6% | 2.9% | 2.9% | 9.3% | 2.7% | 2.9% | 2.7% |
| Middle | 24.4% | 28.6% | 29.9% | 21.6% | 23.7% | 16.2% | 30.4% | 31.5% | 29.8% | 26.8% | 30.5% | 44.1% | 41.3% | 19.5% | 25.5% | 36.6% | 24.6% | 33.0% | 20.3% | 17.3% | 22.1% |
| Higher | 70.0% | 63.9% | 62.0% | 75.5% | 70.7% | 80.6% | 62.2% | 60.6% | 64.7% | 57.1% | 62.5% | 52.0% | 56.5% | 80.0% | 71.8% | 60.5% | 72.8% | 57.7% | 76.9% | 80.0% | 75.1% |
| **Accommodation** | | | | | | | | | | | | | | | | | | | | | |
| Hotel | 68.0% | 65.4% | 10.8% | 77.0% | 69.3% | 83.7% | 65.6% | 65.5% | 73.4% | 66.8% | 66.3% | 64.5% | 60.7% | 76.9% | 72.2% | 71.9% | 68.1% | 59.6% | 66.6% | 59.6% | 70.8% |
| 4*/5* hotel | 44.5% | 48.0% | 4.2% | 43.5% | 41.0% | 58.8% | 41.8% | 41.0% | 57.8% | 42.2% | 45.1% | 35.6% | 38.8% | 46.8% | 37.3% | 49.4% | 46.9% | 32.7% | 48.7% | 53.2% | 46.1% |
| 3* hotel | 21.0% | 15.8% | 5.2% | 30.0% | 24.5% | 22.8% | 20.7% | 21.2% | 13.2% | 21.9% | 19.1% | 26.0% | 21.2% | 27.1% | 33.1% | 21.5% | 19.4% | 21.9% | 16.3% | 6.2% | 22.5% |
| 1*/2* budget hotel | 2.6% | 1.6% | 1.3% | 3.5% | 3.8% | 2.1% | 3.1% | 3.3% | 2.5% | 2.6% | 2.2% | 2.9% | 0.7% | 3.1% | 1.8% | 1.0% | 1.8% | 4.9% | 1.5% | 0.1% | 2.3% |
| Other paid accommodation | 25.1% | 26.0% | 86.5% | 19.5% | 22.3% | 11.5% | 27.1% | 27.1% | 20.2% | 25.4% | 29.3% | 30.4% | 35.3% | 18.9% | 22.2% | 18.4% | 29.3% | 30.5% | 26.9% | 34.3% | 22.3% |
| Other non-paid accommodation | 5.8% | 7.6% | 2.0% | 2.6% | 7.5% | 3.7% | 6.4% | 6.5% | 5.8% | 7.0% | 4.4% | 4.4% | 2.5% | 3.9% | 4.4% | 8.7% | 2.6% | 8.5% | 5.4% | 6.0% | 5.1% |
| Other accommodation | 1.0% | 1.0% | 0.8% | 1.0% | 0.9% | 1.2% | 0.9% | 0.9% | 0.6% | 0.7% | 0.0% | 0.7% | 1.4% | 0.4% | 1.1% | 0.8% | 0.3% | 1.3% | 1.2% | 0.0% | 1.9% |
| **Reservation mode** | | | | | | | | | | | | | | | | | | | | | |
| No pre-booking | 7.9% | 7.0% | 8.6% | 6.0% | 9.4% | 9.5% | 6.8% | 7.5% | 5.3% | 7.4% | 3.1% | 3.0% | 2.8% | 1.5% | 4.6% | 2.5% | 6.5% | 12.1% | 0.6% | 0.0% | 1.0% |
| Pre-booking | 92.1% | 93.0% | 91.5% | 94.0% | 90.6% | 90.6% | 93.2% | 92.5% | 94.7% | 92.6% | 96.9% | 97.0% | 97.2% | 98.5% | 95.4% | 97.5% | 93.5% | 87.9% | 99.4% | 100.0% | 99.0% |
| Travel agency | 30.3% | 36.3% | 34.8% | 31.8% | 20.8% | 29.4% | 37.7% | 37.5% | 33.2% | 23.0% | 35.9% | 36.5% | 33.7% | 70.6% | 63.2% | 44.6% | 39.5% | 38.9% | 39.3% | 35.4% | 41.7% |
| Direct hotel reservation | 19.0% | 16.9% | 14.9% | 19.0% | 20.5% | 23.3% | 11.5% | 11.2% | 13.7% | 10.7% | 14.8% | 10.7% | 7.0% | 9.8% | 7.6% | 5.2% | 12.6% | 11.1% | 13.9% | 20.3% | 10.1% |
| Direct carrier reservation (e.g. airline company) | 14.1% | 10.8% | 14.1% | 15.2% | 17.2% | 15.8% | 9.6% | 8.7% | 14.8% | 11.3% | 5.8% | 7.4% | 5.6% | 7.1% | 1.9% | 11.8% | 13.4% | 6.8% | 18.1% | 25.7% | 13.5% |
| Online reservation | 77.1% | 75.6% | 69.9% | 79.4% | 81.3% | 72.9% | 74.2% | 73.8% | 77.2% | 81.7% | 72.1% | 77.9% | 85.0% | 60.8% | 63.6% | 65.5% | 73.6% | 70.8% | 77.4% | 77.1% | 77.6% |
| Other reservation mode (e.g. corporate travel agent/ in-house company department, tourism agency) | 9.3% | 6.8% | 16.8% | 7.6% | 5.5% | 22.0% | 3.3% | 3.0% | 3.2% | 1.7% | 1.2% | 4.8% | 3.8% | 3.9% | 3.0% | 2.9% | 4.2% | 3.1% | 6.3% | 9.6% | 4.3% |

Sources: World Travel Monitor®; IPK International, 2019, INSETE, Deloitte Analysis

# Key target markets & primary tourism products | Indicative assessment

Given the potential, the capacity / ease of attraction and development, and the effects of COVID-19 on the key target markets which were identified, an initial indicative assessment of their significance, suitability, and impact was made in relation to the Greek tourism's primary tourism products.

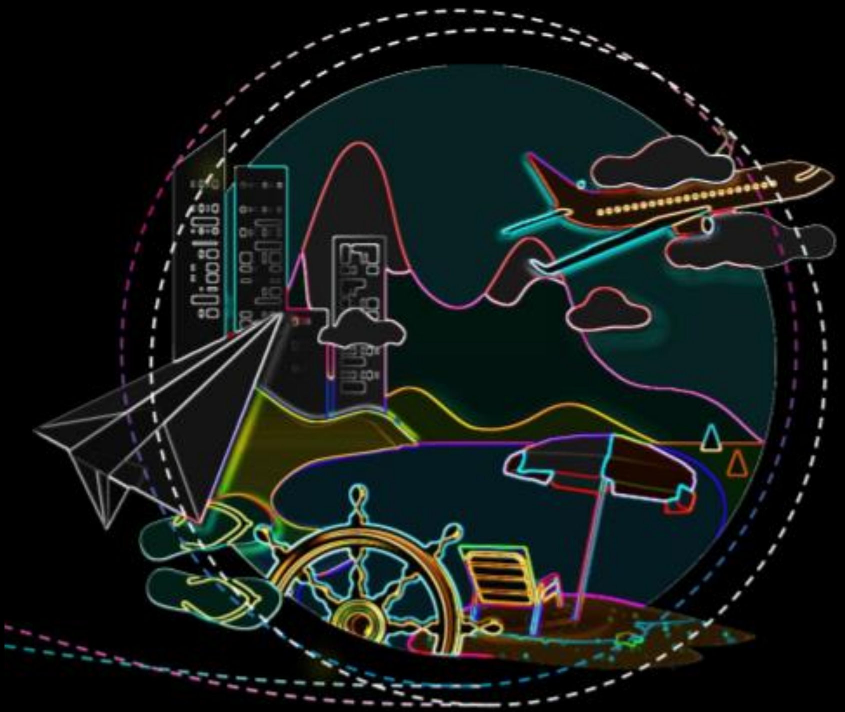
| Target markets | Sun & Beach | Nautical Tourism | Cultural & Religious Tourism | City Break | MICE |
|---|---|---|---|---|---|
| **Western Europe Markets** | | | | | |
| Germany | ● | ◕ | ● | ◕ | ◕ |
| United Kingdom | ● | ◕ | ◕ | ◕ | ◑ |
| France | ◕ | ◕ | ◕ | ◕ | ◑ |
| Italy | ◕ | ◕ | ◕ | ◕ | ◑ |
| **North America Markets** | | | | | |
| USA | ◑ | ◕ | ◕ | ◑ | ◑ |
| Canada | ◑ | ◑ | ◑ | ◑ | ◔ |
| **Eastern Europe Markets** | | | | | |
| Russia | ◕ | ◑ | ◕ | ◑ | ◑ |
| **Emerging markets** | | | | | |
| China | ◕ | ◑ | ◕ | ◑ | ◑ |
| South Korea | ◑ | ◔ | ◑ | ◑ | ◔ |
| India | ◑ | ◔ | ◑ | ◔ | ◑ |

● High significance and suitability with great impact

○ Low significance and suitability without much impact

Sources: Deloitte Analysis

# SWOT analysis



# Strengths

Given the charting of the tourism product and the results of the Consultation, certain competitive advantages were identified in the country's Regions, which can provide the basis for the identification of appropriate strategic decisions to exploit them.

## Strengths

- High number of international arrivals and overnights, especially in the 5 tourism mature Regions (Greece is among Europe's 10 biggest air travel markets)
- High levels of receipts in the 5 tourism mature Regions but higher average expenditure per journey (over €600) only in the South Aegean, Crete, and Ionian Islands Regions, primarily due to the Sun & Beach tourism product
- Relatively high levels of average occupancy in the Regions of Crete, the Ionian Islands, and South Aegean (>60%), primarily due to the Sun & Beach tourism product, and in Attica (>50%)
- Greece is among the 5 strongest tourism brands worldwide
- High competitiveness of Greek tourism (25th place worldwide) and further enhancement of Greece's competitiveness ranking as a tourist destination vis-à-vis the main competing countries during the COVID-19 pandemic
- Improvement of transport infrastructures (especially the country's main road network) and accessibility to almost all of the mainland, recent upgrading of infrastructures for air accessibility, and strong recovery of flights (considerable improvements in the 14 airports managed by Fraport Greece and in some state-managed airports, e.g. Paros and Ioannina), strong recovery of flights in 2021, and relatively high level of sea travel services, with some of Europe's most modern boats sailing on regular lines
- Adequacy and upgrading of accommodation infrastructures and of hotel units in the last ten years with high hotel customer satisfaction indices (GRI) and a steadily rising trend compared to previous years (2019: 87.1% and 2018: 86.3% nationwide)
- Considerable improvement both in the number of staff employed in the tourism sector and in the level of their training in the 2010-2019 period in all Regions throughout the country; the Region of Attica had the highest training index, yet with little improvement in these indices during the same period
- High level of hospitality culture, friendliness, and safety for visitors
- A multitude of islands (over 6,000), the longest coastline in the Mediterranean (~15,000 kilometres), and exceptional beaches
- Gastronomic abundance (Mediterranean diet, agri-food PDO and PGI products), unique historical and cultural heritage (18 UNESCO monuments), and an abundance of religious and environmental / natural resources which can support the development of alternative and thematic forms of tourism and the broader tourism development
- Congress infrastructures which can support the development of the MICE tourism product (Attica, Central Macedonia, Peloponnese / Messinia, Crete, Central Greece)
- Marinas and tourism harbours which can support nautical tourism with yachts (Attica, South Aegean, Western Greece, Ionian Islands), yet further improvement is required
- Some Winter/Sports & Activities Tourism infrastructures and activities (trekking, hiking, climbing, lodges, ski resorts, etc.), and natural springs suitable for Spa / Wellness Tourism
- Significant urban centres with appropriate infrastructures for the development of City Break (Attica, Central Macedonia, Epirus, Thessaly, Western Greece, Eastern Macedonia and Thrace, Crete)
- Great increase and strong momentum in the cruises segment, prior to COVID-19, and considerable opportunities for further enhancement (e.g. homeporting, upgrading infrastructures, etc.)

# Weaknesses

On the other hand, the country's Regions show some problems and weaknesses which would be crucial to address in order for the Regions to attain sustainable tourism development and turn to account the opportunities which have been identified.

## Weaknesses

- High seasonality and concentration of tourism activity in the 3rd quarter every year
- Excessive territorial concentration of tourism activity in 5 of the 13 Regions of Greece (tourism mature Regions: Attica, Ionian Islands, Central Macedonia, Crete, South Aegean)
- High reliance on charter flights and need to upgrade basic equipment and international connectivity at airports which can have significant impact
- Unfriendly urban environment, unplanned sprawl, town and spatial planning issues, environmental degradation, inadequate access and connection to / showcasing of cultural, religious, natural and other resources, low quality of some tourism infrastructures
- Problems and shortages in public infrastructures (some main road networks, the secondary road network, the rail network, border checkpoints, health, water, energy, waste management, infrastructures of archaeological sites and museums, etc.) which are burdened by the increased tourism demand / traffic and are unable to adequately respond to the increased needs, and saturation of popular destinations, as a result of which the quality of life of both residents and visitors deteriorates, as does the tourism product
- Need to update the institutional framework, improve the management, and upgrade / develop the infrastructures of Nautical Tourism (yachting, cruises)
- Inadequate penetration and use of modern digital technology by the Greek tourism sector (state agencies, businesses)
- Absence of a regional Destination Management Organization and of an active tourism Observatory in all Regions, and deficiency in the development of comprehensive tourism products
- Absence of a single tourism brand name and deficient promotion in almost all of the country's Regions, as a result of which the comparative advantages and momentum of the tourism sector are not fully exploited
- Lack of variety of (recreational) activities for differentiated tourist audiences
- One-dimensional focus of the advertising and promotion of Greece's cultural wealth and heritage on antiquity, without showcasing other historical periods or modern culture, without using modern methods of interaction with cultural resources, and without fully utilizing the country's specific competitive advantage to enhance and upgrade the tourism product
- Need to upgrade and streamline tourism education centres, improve the professional training of staff and SMEs in the tourism sector, and coach the staff of public sector agencies dealing with tourism
- Need for better coordination and clear specification of the responsibilities of the agencies involved in tourism (e.g. issues pertaining to advertising & promotion, supervision, resource and infrastructure management, regulatory frameworks)
  - Ministries and related departments (e.g. Ministry of Tourism, Ministry of Maritime Affairs and Insular Policy, Ministry of Infrastructure and Transport, Ministry of Environment and Energy, Ministry of Rural Development and Food, Ministry of Development and Investments, Ministry of Culture and Sports, the Greek National Tourism Organization, etc.)
  - Local authority agencies (e.g. Regions, Municipalities, etc.)
  - Private organizations (e.g. INSETE, Marketing Greece, Hellenic Chamber of Hotels, etc.)
- Weak business and cooperative culture in tourism in a fairly big number of Regions

# Opportunities

Given the international market trends and the results of the Consultation, certain characteristics, developments, and external conditions were identified, which can contribute to the future tourism development of the country's Regions.

## Opportunities

- Further exploitation of the 23 Regional airports through the concession of their management to private investors, which would contribute to the enhancement of their infrastructures, capacity, and connectivity with international destinations, the penetration into new markets, and the promotion of the destination of their location
- Development of sustainable seaplane port networks to bring into use a new means of transport in Greece, which would primarily enhance connectivity among islands and between islands and mainland Greece
- Increasing international demand for alternative and authentic tourism products and experiences which are not provided in the traditional Sun & Beach mass tourism context and which offer the opportunity to turn to account the Regions' natural resources and local culture and traditions for the development of specialist tourism products (e.g. Agritourism and Ecotourism)
- Travellers' turn to a preference for green tourism destinations, businesses, and accommodation options which utilize the circular economy
- Constantly growing demand for local, traditional products and PDO and PGI certified agricultural products (e.g. olive oil, olives, cheese, wine)
- Travellers' increasing demand for healthy and wholesome local food products, manufactured by sustainable processes, which benefits the growth of local production and the viability of small businesses
- Increasing travellers' preference for safe, secondary destinations, which are not characterized by mass tourism features and can offer authentic, unique experiences
- Capitalization on the opportunities arising from teleworking, with the emergence of digital nomads, a population of independent working individuals who combine travel with work (workation), contributing to the local economy and tourism development
- The rise of the Silver Economy, a higher life expectancy, and the improved health of senior citizens contribute to the development of supplementary tourism products (e.g. Senior Tourism, Medical Tourism, Wellness Tourism) and provide considerable opportunities for the extension of the tourism period and the development of new destinations
- Development of Destination Management Organizations for the management and promotion of the tourism product and the utilization of digital technologies and Destination Management Systems, with a view to identifying and approaching specific customer segments / markets (e.g. millennials / Gen Z) with an increased tourism interest, showcasing and promoting the Regions' tourism destinations and products more effectively, and improving the visitors' experience
- Creation of comprehensive modern digital thematic portals / websites which improve the tourism experience and utilize modern digital technology and digital distribution channels to enhance the advertising and promotion of the Regions' tourism businesses
- Substantial and flagship (tourism) investments at the planning and/or construction phase, which are expected to further upgrade the profile / quality of Greek destinations
- Utilization of available European / state funding programmes / tools (e.g. NSRF, Recovery Fund)
- Utilization of the positive image for the efficient management of the new coronavirus (COVID-19) health crisis by Greece, in order to establish a feeling of safety for the travelling community and to turn to account emerging opportunities

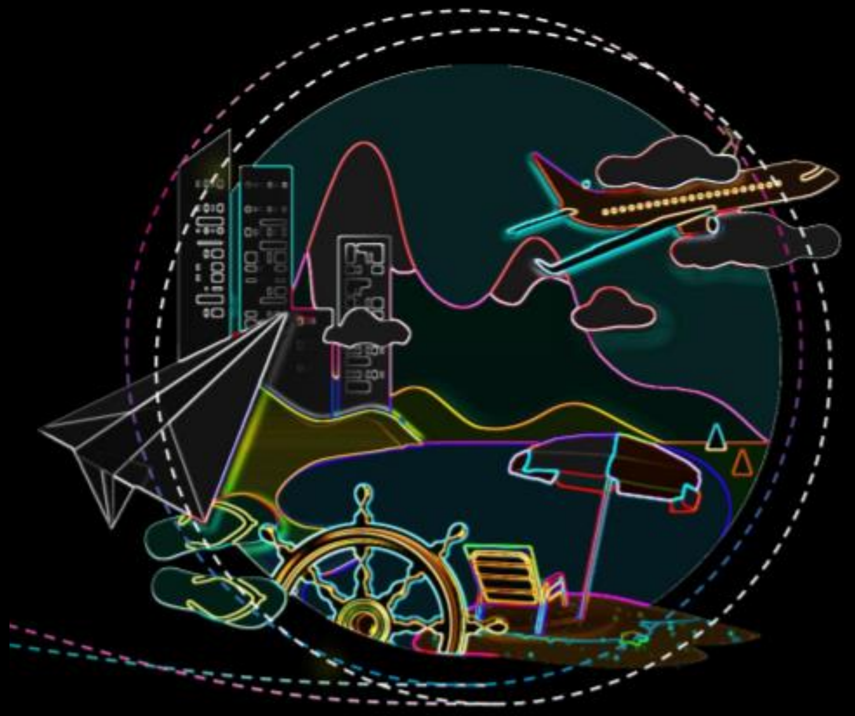
# Threats

However, there are some potential negative developments, characteristics, and external conditions which might, on certain conditions, have a negative impact on the future tourism development of the country's Regions.

## Threats

- The rapid geographical spread of the new coronavirus (COVID-19) is affecting the economy and society of countries throughout the world and the looming impact and threat of a new economic recession fuel an increased feeling of uncertainty in the tourism and hospitality sector. For example:
  - reduced arrivals and income
  - closing of small / heavily indebted hotel businesses
  - delay in the recovery of certain sectors and tourism products, such as cruises and long-haul flights
  - strong effects and impact on the business travel segment
  - association of recovery with the global vaccination programme and link of the health crisis to an economic crisis with unpredictable results in consumer behaviour (e.g. strong feeling of insecurity, high priority to health and safety issues)
  - increased state support (link of liquidity with state benefits and allowances and central planning of the tourist traffic control)
- Financial problems and weaknesses for big travel agencies, which may cause economic difficulties for tourism businesses in the Regions on account of the high reliance of the tourism product on such agencies (especially in the tourism mature Regions)
- Increasing international competition for the tourism mature Regions from Mediterranean destinations which have developed high-quality primary tourism products
- Strong domestic competition among the Regions which focus on common tourism products and share common features, resources, and infrastructures
- Decreased domestic tourism demand due to the economic crisis
- Structural problems of the Greek banking system, insufficient liquidity and funding of domestic tourism businesses
- The current framework for the management and utilization of European funds is extremely bureaucratic and entails long delays, while the multi-tier legislative framework for the launch of tenders and the realization of projects (Law 4412/2016) is excessively complicated, both increasing the likelihood that substantial resources under the new 2021-2027 programming period may not be absorbed
- Great increase of the supply of rooms for rent via platforms (e.g. Airbnb), without safety protocols and in many cases without the special operation sign, often not registered with the Register of Short-term Stay Properties, which pose a potential threat for the image of the tourism product, especially for the tourism mature Regions
- Climate change, which calls for new strategies for the sustainable management of natural resources in areas already burdened in terms of tourism, as well as a change in the strategy of the tourism product which is provided, resulting in new and unknown challenges for tourism destinations and businesses
- The development of thematic tourism products –especially of those which are linked to activities in nature– and the enhancement of the tourism product offering and of the visitors' tourism experience essentially require a high level of cooperation by local communities and of networking by businesses, which in many cases is missing
- The function of the state in the tourism sector, both at central and at local level, is still marked by an overlap of responsibilities and by the inadequate and non-specialized staffing of local authority agencies in terms of the needs of tourism

# Strategy for Greek tourism



# Strategy overview

# Vision & key strategic goals

In order for the vision for Greek tourism to be accomplished, the key strategic goals were identified with a view to showcasing Greece as one of the most competitive and sustainable tourism destinations worldwide.

Vision

*To showcase and fuse the uniqueness of Greek nature, Greek culture, Greek hospitality, and the Greek lifestyle through a multitude of tourism products and experiences which can address many and diverse markets, making Greece one of the most competitive and sustainable tourism destinations worldwide.*
*Tourism will thus become established as a driver of economic, social, and environmental growth for all the country's Regions.*

## Key strategic goals for Greek tourism

1. Strong international tourism brand with great reputation and awareness
2. Safe and high-quality tourism destination throughout the year
3. Numerous tourism destinations throughout the country, with diverse characteristics, tourism product offering, and high-quality experiences
4. Attractiveness for significant tourism audiences / clientele segments (e.g. millennials, emerging tourism markets, digital nomads)
5. Pioneering destination in tourism innovation and entrepreneurship themes and actions
6. Sustainable tourism growth model in line with the circular economy and sustainability principles
7. High-quality jobs, trained workforce, and competitive education and training programmes by international standards
8. A high level of digitalization in the tourism sector and among businesses in the tourism industry
9. Competitive destination for investors with an attractive and steady business environment which is supportive of SMEs
10. Collectiveness, synergies, and a support and collaboration atmosphere among all tourism stakeholders

# Key strategic priorities for Greek tourism

The growth strategy for Greek tourism could focus on the enhancement of Greece's competitiveness ranking as a tourist destination, aiming at the following key strategic priorities: strengthening of the brand "Greece", a better distribution of tourism activity throughout Greece, season extension, increase of the average spend per day, extension of the average duration of stay, enhancement of the penetration in existing established markets, and opening of new markets.

**Key strategic priorities for Greek tourism**

- Sustaining the momentum which is built up in order to further enhance the brand "Greece"
- Tourism development beyond the 5 tourism mature Regions through the development of new destinations
- Combating seasonality and extension of the tourism activity beyond the summer season
- Increase of the average expenditure per overnight stay
- Extension of the average length of stay
- Enhancement of the penetration in existing established markets and opening of new tourism markets

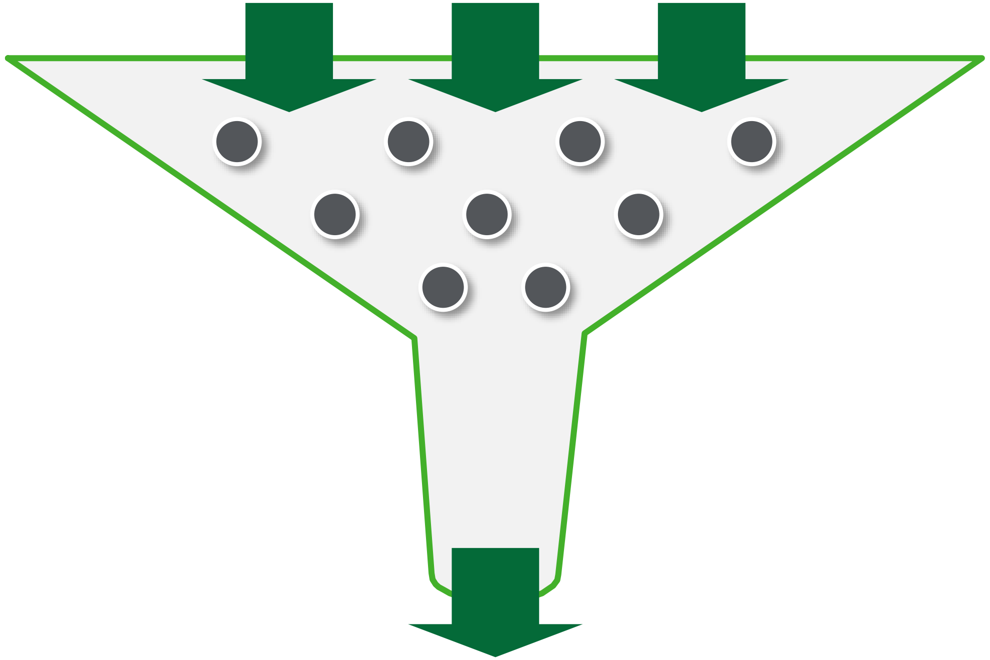
**Prerequisites for the growth of Greek tourism**

- Prompt and adequate information updates about international tourism trends and developments
- Public investments in infrastructures pertaining to destination accessibility and sustainability
- Public investments to reduce the tourism activity distribution imbalance in terms of time and space
- Digitalization of the Greek state, tourism businesses and destinations
- Upgrading of the education and training of tourism professionals and of state agency officers involved in policy design

# Methodology for the selection of indicative destinations

In the context of the Project, a comprehensive Strategy and an Action Plan were developed for indicative destinations which were selected on the basis of the results and conclusions which emerged from the analyses performed for the Project, as well as on the basis of the Consultation which was undertaken with agencies and departments of the country's 13 Regions and with a large number of organizations, professional associations, and market stakeholders operating in the tourism and hospitality sector.

*Given the results and conclusions of the Project deliverables, as well as the Consultation which was undertaken with agencies and departments of the country's 13 Regions and with a large number of organizations, professional associations, and market stakeholders, potential / indicative destinations were identified for development.*



*Once the potential / indicative destinations per Region were identified, an initial assessment was performed on the basis of specific criteria and indicative destinations were selected for which comprehensive Action Plans were then developed. Let it be noted that the results and conclusions of the Consultation were taken into account for the selection of destinations.*

### Selection of indicative destinations

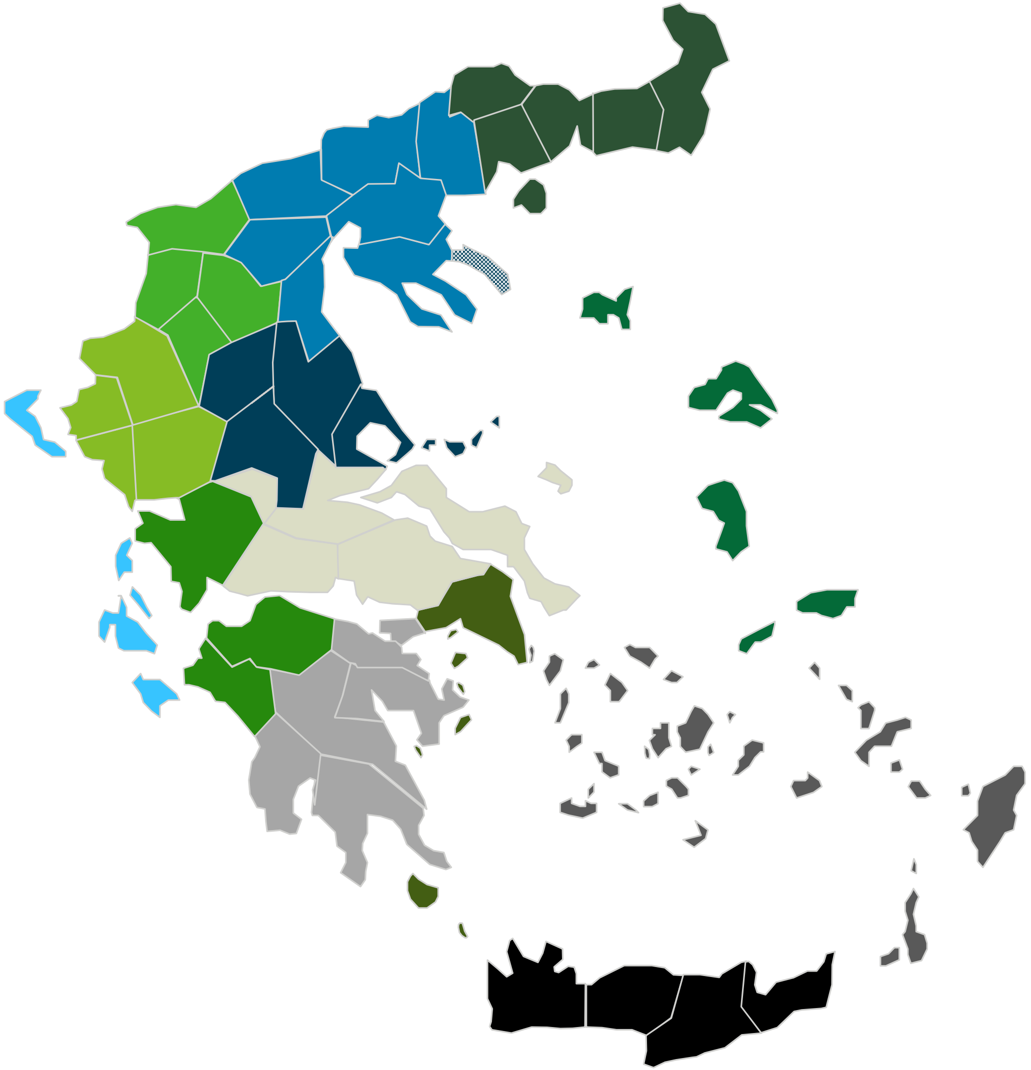
After potential / indicative destinations were identified per Region, they were assessed and selected on the basis of the following:

- **The conclusions and results of the Project deliverables**
- **Specific destination assessment criteria**: accessibility & connectivity, primary tourism products, supplementary tourism products, international reputation & awareness, places of interest and UNESCO monuments, current demand, current supply (accommodation)
- **The results and conclusions of the Consultation which was undertaken with agencies and departments of the country's 13 Regions** and with a large number of organizations, professional associations, and market stakeholders operating in the tourism and hospitality sector.

- Given the results and conclusions of the Consultation, the destinations identified include certain "umbrella" destinations with considerable dynamism and awareness, which may include an entire Region or parts thereof.

# Selected indicative destinations for development

The indicative selected destinations for which a comprehensive Strategy and an Action Plan were developed in the context of the Project with a view to enhancing their tourism development are presented below.



**Eastern Macedonia & Thrace Region**

1. Thrace
2. Thasos, Kavala & Drama

**Attica Region**

3. Athens
4. Athens Riviera
5. Saronic Gulf Islands

**North Aegean Region**

6. Lesvos, Limnos & Chios
7. Samos & Ikaria

**Western Greece Region**

8. Western Greece
9. Olympia

**Western Macedonia Region**

10. Western Macedonia
11. Western Macedonia mountains and lakes

**Epirus Region**

12. Ioannina & surrounding mountains
13. Epirus coast

**Thessaly Region**

14. Volos, Pelion & Sporades Islands
15. Meteora & Western Thessaly

**Ionian Islands Region**

16. Ionian Islands
17. Corfu
18. Zakynthos
19. Cephalonia, Ithaca & Lefkada

**Central Macedonia Region**

20. Thessaloniki
21. Chalkidiki
22. Olympus & Pieria coast

**Crete Region**

23. Crete
24. Northern Crete
25. Southern Crete

**South Aegean Region | Dodecanese**

26. Dodecanese
27. Rhodes
28. Kos

**South Aegean Region | Cyclades**

29. Cyclades
30. Santorini
31. Mykonos

**Peloponnese Region**

32. North-eastern Peloponnese
33. Southern Peloponnese

**Central Greece Region**

34. Delphi, Parnassus & East Central Greece
35. Evia & Skyros
36. Evritania

# Proposed tourism products per selected indicative destination (1)

## The (primary and supplementary) products of the portfolio of Greek tourism which can be developed in each of the selected indicative destinations are presented below.

| | Sun & Beach | Nautical Tourism (yachting) | Nautical Tourism (cruises) | Cultural & Religious Tourism | City Break | MICE | Agritourism | Ecotourism | Sports & Activities Tourism | Gastronomy Tourism | Wellness Tourism |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Eastern Macedonia & Thrace Region** | | | | | | | | | | | |
| 1. Thrace | | | | | | | | | | | |
| 2. Thasos, Kavala & Drama | | | | | | | | | | | |
| **Attica Region** | | | | | | | | | | | |
| 3. Athens | | | | | | | | | | | |
| 4. Athens Riviera | | | | | | | | | | | |
| 5. Saronic Gulf Islands | | | | | | | | | | | |
| **North Aegean Region** | | | | | | | | | | | |
| 6. Lesvos, Limnos & Chios | | | | | | | | | | | |
| 7. Samos & Ikaria | | | | | | | | | | | |
| **Western Greece Region** | | | | | | | | | | | |
| 8. Western Greece | | | | | | | | | | | |
| 9. Olympia | | | | | | | | | | | |
| **Western Macedonia Region** | | | | | | | | | | | |
| 10α. Western Macedonia | | | | | | | | | | | |
| 10β. Western Macedonia mountains and lakes | | | | | | | | | | | |
| **Epirus Region** | | | | | | | | | | | |
| 11. Ioannina & surrounding mountains | | | | | | | | | | | |
| 12. Epirus coast | | | | | | | | | | | |
| **Thessaly Region** | | | | | | | | | | | |
| 13. Volos, Pelion & Sporades Islands | | | | | | | | | | | |
| 14. Meteora & Western Thessaly | | | | | | | | | | | |
| **Ionian Islands Region** | | | | | | | | | | | |
| 15. Ionian Islands | | | | | | | | | | | |
| 16. Corfu | | | | | | | | | | | |
| 17. Zakynthos | | | | | | | | | | | |
| 18. Cephalonia, Ithaca & Lefkada | | | | | | | | | | | |

Established / highly developed product

Potential for development / advancement to established / highly developed product

Existing or subject to development supportive / secondary product

Product with low significance and potential for development

# Proposed tourism products per selected indicative destination (2)

## The (primary and supplementary) products of the portfolio of Greek tourism which can be developed in each of the selected indicative destinations are presented below.

| | Sun & Beach | Nautical Tourism (yachting) | Nautical Tourism (cruises) | Cultural & Religious Tourism | City Break | MICE | Agritourism | Ecotourism | Sports & Activities Tourism | Gastronomy Tourism | Wellness Tourism |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Central Macedonia Region** | | | | | | | | | | | |
| 19. Thessaloniki | Low | Supportive | Potential | Established | Established | Established | Low | Supportive | Potential | Established | Supportive |
| 20. Chalkidiki | Established | Potential | Low | Potential | Low | Supportive | Low | Supportive | Supportive | Potential | Supportive |
| 21. Olympus & Pieria coast | Potential | Supportive | Low | Potential | Low | Low | Low | Potential | Potential | Supportive | Low |
| **Crete Region** | | | | | | | | | | | |
| 22. Crete | Established | Supportive | Potential | Established | Potential | Potential | Potential | Potential | Potential | Established | Supportive |
| 23. Northern Crete | Established | Supportive | Potential | Established | Potential | Potential | Supportive | Supportive | Potential | Established | Supportive |
| 24. Southern Crete | Potential | Supportive | Supportive | Supportive | Supportive | Supportive | Potential | Potential | Potential | Potential | Supportive |
| **South Aegean Region \| Dodecanese** | | | | | | | | | | | |
| 25. Dodecanese | Established | Potential | Potential | Established | Supportive | Supportive | Supportive | Supportive | Potential | Potential | Supportive |
| 26. Rhodes | Established | Potential | Potential | Established | Supportive | Supportive | Low | Supportive | Potential | Potential | Supportive |
| 27. Kos | Established | Potential | Supportive | Potential | Low | Potential | Supportive | Supportive | Potential | Potential | Supportive |
| **South Aegean Region \| Cyclades** | | | | | | | | | | | |
| 28. Cyclades | Established | Established | Established | Potential | Supportive | Supportive | Supportive | Supportive | Potential | Established | Supportive |
| 29. Santorini | Established | Potential | Established | Potential | Low | Supportive | Supportive | Supportive | Supportive | Established | Supportive |
| 30. Mykonos | Established | Potential | Established | Potential | Low | Supportive | Supportive | Supportive | Supportive | Established | Supportive |
| **Peloponnese Region** | | | | | | | | | | | |
| 31. North-eastern Peloponnese | Potential | Potential | Supportive | Established | Supportive | Supportive | Potential | Potential | Potential | Potential | Potential |
| 32. Southern Peloponnese | Potential | Potential | Supportive | Potential | Supportive | Potential | Potential | Potential | Potential | Potential | Supportive |
| **Central Greece Region** | | | | | | | | | | | |
| 33. Delphi, Parnassus & East Central Greece | Supportive | Supportive | Supportive | Established | Supportive | Potential | Potential | Potential | Potential | Potential | Supportive |
| 34. Evia & Skyros | Potential | Potential | Low | Supportive | Supportive | Supportive | Potential | Potential | Potential | Supportive | Potential |
| 35. Evritania | Low | Low | Low | Supportive | Supportive | Supportive | Potential | Potential | Potential | Potential | Supportive |

| | | | |
|---|---|---|---|
| Established / highly developed product | Potential for development / advancement to established /highly developed product | Existing or subject to development supportive / secondary product | Product with low significance and potential for development |

# Methodology for developing the Strategy and Action Plans per destination

The methodology which was used to develop the Strategy and Action Plans per destination is presented below.

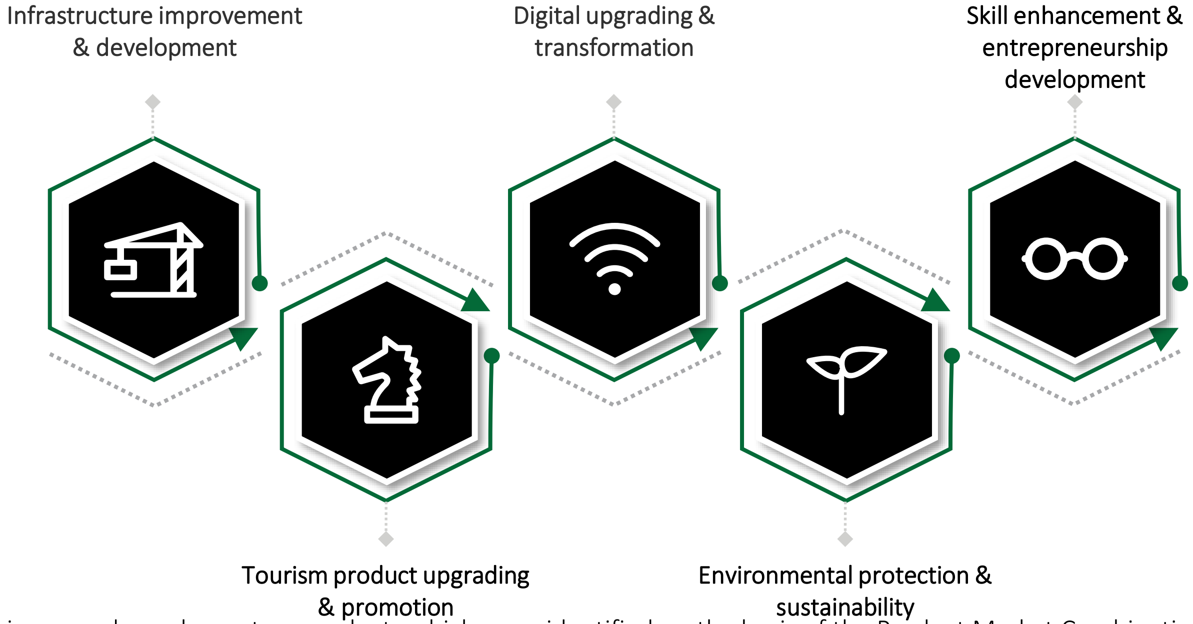
## Development of Product Market Combinations

In developing the Strategy and in formulating attractive Product Market Combinations (PMCs) per selected indicative destination, the results and conclusions which emerged from the Project Deliverables and from the Consultation which was undertaken were taken into account. Specifically:

- The tourism products were identified on the basis of the results and conclusions of the Project Deliverables, the Consultation which was undertaken, and the assessment of the selected destinations.
- The markets were identified on the basis of the results and conclusions of the Project Deliverables and the Consultation which was undertaken; in addition, the existing markets of each destination and any potential target markets, as cited in the studies of INSETE and in the data of the Border Survey of the Bank of Greece, were also taken into account.

## Development of Action Plans

- The Action Plans per destination were developed in the following strategic areas-domains, which are common in all Destination Action Plans, and their selection was founded on **best practices and successful competing destination cases, as well as on the results of the Consultation.**




- For each of the primary and supplementary products which were identified on the basis of the Product Market Combinations in each destination, strategic directions were developed which then yield specific strategic dimensions.
- Moreover, for each destination horizontal strategic directions (and matching strategic actions) were identified and developed which pertain to more than one primary and/or supplementary tourism products and which emerged from the results and conclusions of the Project Deliverables and the Consultation which was undertaken.

# Eastern Macedonia & Thrace Region

For the tourism development of the Eastern Macedonia & Thrace Region, a focus on alternative and thematic tourism products and on nearby markets is recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (yachting) |
| | Cultural & Religious Tourism | Nautical Tourism (cruises) |
| | City Break | MICE |
| | Agritourism | Wellness Tourism |
| | Ecotourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

Bulgaria, Turkey, Romania, Germany

### Existing and / or new target markets for development

Serbia, North Macedonia, United Kingdom, Poland, Czech Republic

### Domestic Tourism

# Destination "Thrace"

The product focus and the target markets for the destination "Thrace" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (yachting) |
| | Cultural & Religious Tourism | MICE |
| | City Break | Wellness Tourism |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

**Existing and / or new target markets for development**

- Turkey
- Bulgaria
- Germany
- Serbia
- North Macedonia
- Romania
- United Kingdom

**Domestic Tourism**

# Destination "Thasos, Kavala & Drama"

The product focus and the target markets for the destination "Thasos, Kavala & Drama" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
| --- | --- | --- |
| | Sun & Beach | Nautical Tourism (yachting) |
| | Cultural & Religious Tourism | Nautical Tourism (cruises) |
| | City Break | MICE |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |
| | Wellness Tourism | |

## Target markets

### Existing established markets

- Bulgaria
- Turkey
- Romania
- Germany

### Existing and / or new target markets for development

- Serbia
- North Macedonia
- United Kingdom
- Poland
- Czech Republic

### Domestic Tourism

# Attica Region

For the Attica Region, the full utilization of available resources and infrastructures and of the substantial projects and investments which are in the planning / realization phase, especially along the coast of the metropolitan centre of Athens, is recommended in order to attain the further development of primary tourism products and the penetration into new markets.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Nautical Tourism (yachting) | Sun & Beach | Ecotourism |
| Nautical Tourism (cruises) | Sports & Activities Tourism | Wellness Tourism |
| Cultural & Religious Tourism | Gastronomy Tourism | |
| City Break | | |
| MICE | | |

## Target markets

### Existing established markets

USA, United Kingdom, Cyprus, Germany, France, Italy, Turkey, Australia

### Existing and / or new target markets for development

Spain, Netherlands, Scandinavia, Poland, Switzerland, Russia, Canada, Israel, China, India, S. Korea, Middle East

### Domestic Tourism

# Destination "Athens"

The product focus and the target markets for the destination "Athens" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Nautical Tourism (yachting) | Sun & Beach | Ecotourism |
| Nautical Tourism (cruises) | | Wellness Tourism |
| Cultural & Religious Tourism | | |
| City Break | | |
| MICE | | |
| Sports & Activities Tourism | | |
| Gastronomy Tourism | | |

## Target markets

### Existing established markets

USA, United Kingdom, Cyprus, Germany, France, Italy, Turkey, Australia

### Existing and / or new target markets for development

Spain, Netherlands, Scandinavia, Poland, Switzerland, Russia, Canada, Israel, China, India, S. Korea, Middle East

### Domestic Tourism

# Destination "Athens Riviera"

The product focus and the target markets for the destination "Athens Riviera" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Nautical Tourism (yachting) | Sun & Beach | Wellness Tourism |
| Nautical Tourism (cruises) | MICE | |
| City Break | Cultural & Religious Tourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

USA, United Kingdom, Cyprus, Germany, France, Italy, Turkey, Australia

### Existing and / or new target markets for development

Spain, Netherlands, Scandinavia, Poland, Switzerland, Russia, Canada, Israel, China, India, S. Korea, Middle East

### Domestic Tourism

# Destination "Saronic Gulf Islands"

The product focus and the target markets for the destination "Saronic Gulf Islands" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | City Break |
| | Cultural & Religious Tourism | MICE |
| | | Ecotourism |
| | | Sports & Activities Tourism |
| | | Gastronomy Tourism |
| | | Wellness Tourism |

## Target markets

**Existing and / or new target markets for development**

- USA
- United Kingdom
- Cyprus
- Germany
- France
- Italy
- Turkey
- Australia
- Spain
- Netherlands
- Scandinavia
- Poland
- Israel
- Russia
- Canada

**Domestic Tourism**

# North Aegean Region

For the North Aegean Region, its development as an island destination with an alternative character and a focus on alternative / thematic products and on the markets of Western Europe, Turkey, and Israel is recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | Sports & Activities Tourism |
| | Cultural & Religious Tourism | |
| | Agritourism | |
| | Ecotourism | |
| | Gastronomy Tourism | |
| | Wellness Tourism | |

## Target markets

### Existing established markets

Turkey, United Kingdom, USA, Germany, Netherlands, Sweden

### Existing and / or new target markets for development

Poland, Denmark, Austria, Norway, Belgium, Finland, Switzerland, Italy, Czech Republic, Israel

### Domestic Tourism

# Destination "Lesvos, Limnos & Chios"

The product focus and the target markets for the destination "Lesvos, Limnos & Chios" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | Sports & Activities Tourism |
| | Cultural & Religious Tourism | |
| | Agritourism | |
| | Ecotourism | |
| | Gastronomy Tourism | |
| | Wellness Tourism | |

## Target markets

**Existing established markets**

Turkey, United Kingdom, Germany, USA, Netherlands

**Existing and / or new target markets for development**

Poland, Denmark, Austria, Norway, Belgium, Finland, Switzerland, Israel

**Domestic Tourism**

# Destination "Samos & Ikaria"

The product focus and the target markets for the destination "Samos & Ikaria" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | Sports & Activities Tourism |
| | Cultural & Religious Tourism | Wellness Tourism |
| | Agritourism | |
| | Ecotourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

Turkey, USA, Germany, Netherlands, Sweden

### Existing and / or new target markets for development

United Kingdom, Norway, Italy, Denmark, Czech Republic, Austria, Finland, Belgium, Switzerland, Poland, Israel

### Domestic Tourism

# Western Greece Region

For the Western Greece Region, a focus on the development of the Regional Unit of Etoloakarnania in alternative / thematic products, the Regional Unit of Achaia in the combination of Sun & Beach with City Break / MICE, aspects of Cultural & Religious Tourism, and alternative / thematic products, and the Regional Unit of Ilia in Sun & Beach, cruises, and Cultural & Religious Tourism is recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Cultural & Religious Tourism | Sun & Beach | Nautical Tourism (yachting) |
| | Nautical Tourism (cruises) | Gastronomy Tourism |
| | City Break | Wellness Tourism |
| | MICE | |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Albania

### Existing and / or new target markets for development

Netherlands, Italy, Poland, Austria

USA, China, S. Korea, Middle East

### Domestic Tourism

# Destination "Western Greece"

The product focus and the target markets for the destination "Western Greece" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Cultural & Religious Tourism | Sun & Beach | Nautical Tourism (yachting) |
| | Nautical Tourism (cruises) | Gastronomy Tourism |
| | City Break | Wellness Tourism |
| | MICE | |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Albania

### Existing and / or new target markets for development

Netherlands, Italy, Poland, Austria

USA, China, S. Korea, Middle East

### Domestic Tourism

# Destination "Olympia"

The product focus and the target markets for the destination "Olympia" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Cultural & Religious Tourism | Sun & Beach | Nautical Tourism (yachting) |
| | Nautical Tourism (cruises) | Agritourism |
| | | Ecotourism |
| | | Sports & Activities Tourism |
| | | Gastronomy Tourism |
| | | Wellness Tourism |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Albania

### Existing and / or new target markets for development

Netherlands, Italy, Poland, Austria

USA, China, S. Korea, Middle East

### Domestic Tourism

# Western Macedonia Region

For the tourism development of the destinations of the Western Macedonia Region ("Western Macedonia" and "Western Macedonia mountains and lakes" destinations), a focus on alternative / thematic products, which shall have to be enriched, combined and promoted as a single product, on Balkan markets, which are near, and on key European markets for which Greece is a popular destination, such as Germany, is recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Cultural & Religious Tourism | City Break |
| | Agritourism | MICE |
| | Ecotourism | Wellness Tourism |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

Existing and / or new target markets for development

Albania, Bulgaria, Romania, North Macedonia, Germany

Domestic Tourism

# Epirus Region

For the Epirus Region, a focus on alternative / thematic tourism products, Cultural & Religious Tourism, and City Break in the Regional Unit of Ioannina is recommended. With regard to the Regional Units of Preveza and Thesprotia, a focus on Sun & Beach, yachting, and Cultural & Religious Tourism is recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Agritourism | Sun & Beach | Nautical Tourism (cruises) |
| Ecotourism | Nautical Tourism (yachting) | MICE |
| | Cultural & Religious Tourism | Wellness Tourism |
| | City Break | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing and / or new target markets for development

| | | | |
|---|---|---|---|
| Albania | Romania | Ukraine | Serbia |
| Germany | Sweden | Norway | Cyprus |
| Netherlands | Italy | United Kingdom | Czech Republic |
| Denmark | Finland | Turkey | Israel |

### Domestic Tourism

# Destination "Ioannina & surrounding mountains"

The product focus and the target markets for the destination "Ioannina & surrounding mountains" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Agritourism | Cultural & Religious Tourism | MICE |
| Ecotourism | City Break | Wellness Tourism |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing and / or new target markets for development

| | | | |
|---|---|---|---|
| Albania | Romania | Ukraine | Serbia |
| Germany | Sweden | Norway | Cyprus |
| Netherlands | Italy | United Kingdom | Turkey |
| | Israel | | |

### Domestic Tourism

# Destination "Epirus coast"

The product focus and the target markets for the destination "Epirus coast" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | Agritourism |
| | Cultural & Religious Tourism | Ecotourism |
| | | Sports & Activities Tourism |
| | | Gastronomy Tourism |
| | | Wellness Tourism |

## Target markets

### Existing and / or new target markets for development

- Albania
- Romania
- Ukraine
- Serbia
- Germany
- Sweden
- Norway
- Denmark
- Finland
- Netherlands
- Italy
- United Kingdom
- Czech Republic

### Domestic Tourism

# Thessaly Region

The Region has a potential for the development of diverse products. For Volos, Pelion and the Sporades Islands, a focus on Sun & Beach, yachting, and alternative / thematic products is recommended. For Meteora and Western Thessaly, a focus on Cultural & Religious Tourism and on alternative / thematic products is recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Ecotourism | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | City Break |
| | Cultural & Religious Tourism | MICE |
| | Agritourism | Wellness Tourism |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

Italy, United Kingdom, Germany, Romania

### Existing and / or new target markets for development

Cyprus, Netherlands, Belgium, Luxembourg, Austria, Serbia, Switzerland, France, Scandinavia, Poland, Czech Republic, Bulgaria, USA, Israel, Canada, Russia

### Domestic Tourism

# Destination "Volos, Pelion & Sporades Islands"

The product focus and the target markets for the destination "Volos, Pelion & Sporades Islands" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Ecotourism | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | City Break |
| | Cultural & Religious Tourism | MICE |
| | Agritourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

Italy, United Kingdom, Germany, Romania

### Existing and / or new target markets for development

Cyprus, Netherlands, Belgium, Luxembourg, Austria, Serbia, Switzerland, France, Scandinavia, Poland, Czech Republic, Bulgaria, Israel

### Domestic Tourism

# Destination "Meteora & Western Thessaly"

The product focus and the target markets for the destination "Meteora & Western Thessaly" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Cultural & Religious Tourism | City Break |
| | Agritourism | MICE |
| | Ecotourism | Gastronomy Tourism |
| | Sports & Activities Tourism | Wellness Tourism |

## Target markets

### Existing established markets

Italy, United Kingdom, Germany, Romania

### Existing and / or new target markets for development

Netherlands, Austria, Switzerland, France, Poland, Russia

Serbia, Bulgaria, USA, Israel, Canada

### Domestic Tourism

# Ionian Islands Region

For the development of the Ionian Islands Region, a focus on the Sun & Beach, Nautical Tourism, Cultural & Religious Tourism, Sports & Activities Tourism, and Gastronomy Tourism products is recommended. Moreover, it is estimated that the tourism product should be further enhanced, and that tourism development should expand to the other islands, apart from Corfu and Zakynthos, preserving the balance between authenticity, capacity, and tourism development.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Cultural & Religious Tourism | City Break |
| Nautical Tourism (yachting) | Sports & Activities Tourism | MICE |
| Nautical Tourism (cruises) | Gastronomy Tourism | Agritourism |
| | | Ecotourism |

## Target markets

### Existing established markets

United Kingdom, Germany, Italy, Poland, Netherlands, France, Austria

### Existing and / or new target markets for development

Serbia, Switzerland, Belgium, Sweden, Denmark, Albania, Czech Republic, USA, Israel, Russia, Canada, Middle East

### Domestic Tourism

# Destination "Ionian Islands"

The product focus and the target markets for the destination "Ionian Islands" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | City Break |
| Nautical Tourism (cruises) | Cultural & Religious Tourism | MICE |
| | Sports & Activities Tourism | Agritourism |
| | Gastronomy Tourism | Ecotourism |

## Target markets

### Existing established markets

United Kingdom, Germany, Italy, Poland, Netherlands, France, Austria, Russia

### Existing and / or new target markets for development

Serbia, Switzerland, Belgium, Sweden, Denmark, Albania, USA, Canada, Middle East

### Domestic Tourism

# Destination "Corfu"

The product focus and the target markets for the destination "Corfu" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Cultural & Religious Tourism | City Break |
| Nautical Tourism (yachting) | Gastronomy Tourism | MICE |
| Nautical Tourism (cruises) | | Agritourism |
| | | Ecotourism |
| | | Sports & Activities Tourism |

## Target markets

### Existing established markets

United Kingdom, Germany, Italy, France, Poland

### Existing and / or new target markets for development

Netherlands, Czech Republic, Austria, Russia, Switzerland, Belgium, Sweden, Albania, USA, Israel, Canada, Middle East

### Domestic Tourism

# Destination "Zakynthos"

The product focus and the target markets for the destination "Zakynthos" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | Nautical Tourism (cruises) |
| | Gastronomy Tourism | Cultural & Religious Tourism |
| | | Agritourism |
| | | Ecotourism |
| | | Sports & Activities Tourism |

## Target markets

### Existing established markets

United Kingdom, Italy, Poland, Netherlands

### Existing and / or new target markets for development

Germany, France, Austria, Russia, Serbia, Switzerland, Belgium, Sweden, Denmark, Czech Republic

### Domestic Tourism

# Destination "Cephalonia, Ithaca & Lefkada"

The product focus and the target markets for the destination "Cephalonia, Ithaca & Lefkada" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | Agritourism |
| | Nautical Tourism (cruises) | Ecotourism |
| | Cultural & Religious Tourism | Sports & Activities Tourism |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

United Kingdom, Germany, Italy, Poland, Netherlands

### Existing and / or new target markets for development

France, Austria, Serbia, Switzerland, Belgium, Sweden, Denmark, Czech Republic

### Domestic Tourism

# Central Macedonia Region

For the tourism development of the Region, the enhancement of Cultural & Religious Tourism throughout the Region, the establishment of Thessaloniki as a key international tourist attraction (City Break, MICE, homeporting, cruises, Gastronomy and Sports & Activities Tourism), the showcasing of Chalkidiki as a high-quality Sun & Beach destination, the further enhancement of Pieria in Sun & Beach, and the tourism exploitation of the international brand name "Olympus" are recommended.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | Wellness Tourism |
| Cultural & Religious Tourism | Nautical Tourism (cruises) | |
| City Break | Sports & Activities Tourism | |
| MICE | Ecotourism | |
| Gastronomy Tourism | | |

## Target markets

### Existing established markets

Germany, United Kingdom, Cyprus, Serbia, Bulgaria, Romania, North Macedonia, Russia

### Existing and / or new target markets for development

Italy, Netherlands, Austria, Poland, Belgium, France, Turkey

Israel, Sweden, Denmark, Hungary, Czech Republic, Slovakia

### Domestic Tourism

# Destination "Thessaloniki"

The product focus and the target markets for the destination "Thessaloniki" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
| --- | --- | --- |
| Cultural & Religious Tourism | Nautical Tourism (cruises) | Nautical Tourism (yachting) |
| City Break | Sports & Activities Tourism | Ecotourism |
| MICE | | Wellness Tourism |
| Gastronomy Tourism | | |

## Target markets

### Existing established markets

Germany, United Kingdom, Cyprus, Serbia, Bulgaria, Romania, North Macedonia, Russia

### Existing and / or new target markets for development

Italy, Netherlands, Austria, Poland, Belgium, France, Turkey, Israel

### Domestic Tourism

# Destination "Chalkidiki"

The product focus and the target markets for the destination "Chalkidiki" are presented below.

## Product focus

**Established / highly developed**

- Sun & Beach

**Potential for development / advancement to established / highly developed**

- Nautical Tourism (yachting)
- Cultural & Religious Tourism
- Gastronomy Tourism

**Existing or subject to development supportive / secondary**

- MICE
- Ecotourism
- Sports & Activities Tourism
- Wellness Tourism

## Target markets

**Existing established markets**

Germany, United Kingdom, Cyprus, Serbia, Bulgaria, Romania, North Macedonia, Russia

**Existing and / or new target markets for development**

Italy, Netherlands, Austria, Poland, Belgium, France, Turkey, Israel, Sweden, Denmark

**Domestic Tourism**

# Destination "Olympus & Pieria coast"

The product focus and the target markets for the destination "Olympus & Pieria coast" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (yachting) |
| | Cultural & Religious Tourism | Gastronomy Tourism |
| | Ecotourism | Wellness Tourism |
| | Sports & Activities Tourism | |

## Target markets

### Existing established markets

Germany, Serbia, Bulgaria, Romania, North Macedonia, Poland, Hungary, Czech Republic, Slovakia

### Existing and / or new target markets for development

Cyprus, United Kingdom, Italy, Belgium, Russia, Israel, Turkey

### Domestic Tourism

# Crete Region

The Region of Crete is one of the top, flagship, and well-known Greek destinations, with considerable potential for further tourism development and for the extension of the tourism period through the development and enhancement / diversification / upgrading of City Break, MICE, and supplementary products, along with the more effective advertising and promotion of the tourism product. Ensuring a sustainable tourism development is a key challenge.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (cruises) | Nautical Tourism (yachting) |
| Cultural & Religious Tourism | City Break | Wellness Tourism |
| Gastronomy Tourism | MICE | |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Netherlands, Belgium, Italy, Switzerland, Russia, Poland

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Czech Republic, Norway, USA, Canada, China, Israel, Middle East

### Domestic Tourism

# Destination "Crete"

The product focus and the target markets for the destination "Crete" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (cruises) | Nautical Tourism (yachting) |
| Cultural & Religious Tourism | City Break | Wellness Tourism |
| Gastronomy Tourism | MICE | |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Netherlands, Belgium, Italy, Switzerland, Russia, Poland

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Czech Republic, Norway, USA, Canada, China, Israel, Middle East

### Domestic Tourism

# Destination "Northern Crete"

The product focus and the target markets for the destination "Northern Crete" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (cruises) | Nautical Tourism (yachting) |
| Cultural & Religious Tourism | City Break | Agritourism |
| Gastronomy Tourism | MICE | Ecotourism |
| | Sports & Activities Tourism | Wellness Tourism |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Netherlands, Belgium, Italy, Switzerland, Russia, Poland

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Czech Republic, Norway, USA, Canada, China, Israel, Middle East

### Domestic Tourism

# Destination "Southern Crete"

The product focus and the target markets for the destination "Southern Crete" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (yachting) |
| | Agritourism | Nautical Tourism (cruises) |
| | Ecotourism | Cultural & Religious Tourism |
| | Sports & Activities Tourism | City Break |
| | Gastronomy Tourism | MICE |
| | | Wellness Tourism |

## Target markets

### Existing established markets

Germany, France, United Kingdom, Netherlands, Belgium, Italy, Switzerland, Russia, Poland

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Czech Republic, Norway, USA, Canada, China, Israel, Middle East

### Domestic Tourism

# South Aegean Region | Dodecanese

The Dodecanese provide one of the most recognizable Greek destinations with considerable potential for further tourism development, which can spread to the less developed islands of the group, an extension of the tourism period, and an upgrade of the experience offering. The main challenges pertain to the one-dimensional focus on Sun & Beach and maintaining the balance between tourism and the preservation of the unique landscape, the natural, cultural, and environmental resources, and the character and authenticity of the islands.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | City Break |
| Cultural & Religious Tourism | Nautical Tourism (cruises) | MICE |
| | Sports & Activities Tourism | Agritourism |
| | Gastronomy Tourism | Ecotourism |
| | | Wellness Tourism |

## Target markets

### Existing established markets

United Kingdom, Germany, Sweden, Israel, Italy, Poland, Russia, Netherlands

### Existing and / or new target markets for development

France, Finland, Czech Republic, Denmark, Belgium, Austria, Turkey, Switzerland, Norway, USA, Canada, Australia, Middle East

### Domestic Tourism

# Destination "Dodecanese"

The product focus and the target markets for the destination "Dodecanese" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | City Break |
| Cultural & Religious Tourism | Nautical Tourism (cruises) | MICE |
| | Sports & Activities Tourism | Agritourism |
| | Gastronomy Tourism | Ecotourism |
| | | Wellness Tourism |

## Target markets

### Existing established markets

United Kingdom, Germany, Sweden, Israel, Italy, Poland, Russia, Netherlands

### Existing and / or new target markets for development

France, Finland, Czech Republic, Denmark, Belgium, Austria, Turkey, Switzerland, Norway, USA, Canada, Australia, Middle East

### Domestic Tourism

# Destination "Rhodes"

The product focus and the target markets for the destination "Rhodes" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | City Break |
| Cultural & Religious Tourism | Nautical Tourism (cruises) | MICE |
| | Sports & Activities Tourism | Ecotourism |
| | Gastronomy Tourism | Wellness Tourism |

## Target markets

### Existing established markets

United Kingdom, Germany, Sweden, Israel, Italy, Poland, Russia

### Existing and / or new target markets for development

France, Finland, Czech Republic, Denmark, Belgium, Austria, Turkey, Netherlands, Switzerland, Norway, USA, Canada, Australia, Middle East

### Domestic Tourism

# Destination "Kos"

The product focus and the target markets for the destination "Kos" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | Nautical Tourism (cruises) |
| | Cultural & Religious Tourism | Agritourism |
| | MICE | Ecotourism |
| | Sports & Activities Tourism | Wellness Tourism |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

United Kingdom, Germany, Netherlands, Poland

### Existing and / or new target markets for development

Italy, Belgium, Czech Republic, Austria, Switzerland, Israel, Scandinavia, Russia

### Domestic Tourism

# South Aegean Region | Cyclades

The Cyclades provide one of the top, flagship, and popular Greek destinations with considerable potential for further tourism development, which can spread to the less tourism mature islands of the group, an extension of the tourism period, and the approach of significant emerging international tourism markets. Ensuring a sustainable development and addressing instances of overtourism, which greatly downgrade the tourism product and experience offering, are the key challenges.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
| --- | --- | --- |
| Sun & Beach | Cultural & Religious Tourism | City Break |
| Nautical Tourism (yachting) | Sports & Activities Tourism | MICE |
| Nautical Tourism (cruises) | | Agritourism |
| Gastronomy Tourism | | Ecotourism |
| | | Wellness Tourism |

## Target markets

### Existing established markets

Germany, United Kingdom, USA, Italy, France, Poland, Netherlands, Russia

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Switzerland, Belgium, Norway, Spain, Cyprus, Israel, Middle East, Turkey, Canada, Australia, China, India, South Korea

### Domestic Tourism

# Destination "Cyclades"

The product focus and the target markets for the destination "Cyclades" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Cultural & Religious Tourism | City Break |
| Nautical Tourism (yachting) | Sports & Activities Tourism | MICE |
| Nautical Tourism (cruises) | | Agritourism |
| Gastronomy Tourism | | Ecotourism |
| | | Wellness Tourism |

## Target markets

### Existing established markets

Germany, United Kingdom, USA, Italy, France, Poland, Netherlands, Russia

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Switzerland, Belgium, Norway, Spain, Cyprus, Israel, Middle East, Turkey, Canada, Australia, China, India, South Korea

### Domestic Tourism

# Destination "Santorini"

The product focus and the target markets for the destination "Santorini" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | MICE |
| Nautical Tourism (cruises) | Cultural & Religious Tourism | Agritourism |
| Gastronomy Tourism | | Ecotourism |
| | | Sports & Activities Tourism |
| | | Wellness Tourism |

## Target markets

### Existing established markets

Italy, United Kingdom, France, Germany, USA, Australia

### Existing and / or new target markets for development

Austria, Sweden, Denmark, Switzerland, Belgium, Norway, Spain, Netherlands, Israel, Middle East, Turkey, Canada, Poland, China, India, South Korea

### Domestic Tourism

# Destination "Mykonos"

The product focus and the target markets for the destination "Mykonos" are presented below.

## Product focus

### Established / highly developed
- Sun & Beach
- Nautical Tourism (cruises)
- Gastronomy Tourism

### Potential for development / advancement to established / highly developed
- Nautical Tourism (yachting)
- Cultural & Religious Tourism

### Existing or subject to development supportive / secondary
- MICE
- Agritourism
- Ecotourism
- Sports & Activities Tourism
- Wellness Tourism

## Target markets

### Existing established markets
Italy, United Kingdom, France, Germany, Switzerland, USA, Australia

### Existing and / or new target markets for development
Austria, Sweden, Denmark, Cyprus, Belgium, Norway, Spain, Netherlands, Israel, Middle East, Turkey, Canada, Poland, China, India, South Korea

### Domestic Tourism

# Peloponnese Region

A destination with considerable potential for development in Sun & Beach, yachting, and Cultural & Religious Tourism, and with resources for the development of alternative / supplementary products. The unique identity of the destination and its suitability for visits throughout the year should be established and showcased, air connectivity should be improved, promotion and advertising should be more effective, and products should be upgraded / enriched.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Cultural & Religious Tourism | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | City Break |
| | MICE | |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |
| | Wellness Tourism | |

## Target markets

### Existing established markets

Germany, USA, France, United Kingdom, Scandinavia, Switzerland

### Existing and / or new target markets for development

Austria, Poland, Netherland, Russia, Canada, Israel, China, South Korea

### Domestic Tourism

# Destination "North-eastern Peloponnese"

The product focus and the target markets for the destination "North-eastern Peloponnese" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Cultural & Religious Tourism | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | City Break |
| | Agritourism | MICE |
| | Ecotourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |
| | Wellness Tourism | |

## Target markets

### Existing established markets

Germany, USA, France, United Kingdom

### Existing and / or new target markets for development

Austria, Poland, Netherland, Switzerland, Canada, Israel, China, South Korea

### Domestic Tourism

# Destination "Southern Peloponnese"

The product focus and the target markets for the destination "Southern Peloponnese" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Sun & Beach | Nautical Tourism (cruises) |
| | Nautical Tourism (yachting) | City Break |
| | Cultural & Religious Tourism | Wellness Tourism |
| | MICE | |
| | Agritourism | |
| | Ecotourism | |
| | Sports & Activities Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

Germany, USA, France, United Kingdom, Scandinavia, Switzerland

### Existing and / or new target markets for development

Austria, Poland, Netherlands, Israel, Russia

### Domestic Tourism

# Central Greece Region

In order to attain its tourism development, the Region should focus on Sun & Beach, yachting, Cultural & Religious Tourism, MICE, and alternative / thematic products. Moreover, the improvement of connectivity with / accessibility from international markets, the more effective promotion & advertising, and upgrading / enhancing the product offering are also considered essential.

## Product focus

**Established / highly developed**

- Cultural & Religious Tourism

**Potential for development / advancement to established / highly developed**

- Sun & Beach
- Nautical Tourism (yachting)
- MICE
- Agritourism
- Ecotourism
- Sports & Activities Tourism
- Gastronomy Tourism
- Wellness Tourism

**Existing or subject to development supportive / secondary**

- Nautical Tourism (cruises)
- City Break

## Target markets

**Existing established markets**

USA, France, Germany, United Kingdom

**Existing and / or new target markets for development**

Poland, Netherlands, Switzerland, Russia, Austria

**Domestic Tourism**

# Destination "Delphi, Parnassus & East Central Greece"

The product focus and the target markets for the destination "Delphi, Parnassus & East Central Greece" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Cultural & Religious Tourism | MICE | Sun & Beach |
| | Agritourism | Nautical Tourism (cruises) |
| | Ecotourism | Nautical Tourism (yachting) |
| | Sports & Activities Tourism | City Break |
| | Gastronomy Tourism | Wellness Tourism |

## Target markets

### Existing established markets

USA, France, Germany, United Kingdom

### Existing and / or new target markets for development

Poland, Netherlands, Switzerlan d, Russia

### Domestic Tourism

# Destination "Evia & Skyros"

The product focus and the target markets for the destination "Evia & Skyros" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| Sun & Beach | Nautical Tourism (yachting) | Cultural & Religious Tourism |
| | Agritourism | City Break |
| | Ecotourism | MICE |
| | Sports & Activities Tourism | Gastronomy Tourism |
| | Wellness Tourism | |

## Target markets

### Existing established markets

USA, France

### Existing and / or new target markets for development

Germany, United Kingdom, Poland, Netherlands, Switzerland, Austria, Russia

### Domestic Tourism

# Destination "Evritania"

The product focus and the target markets for the destination "Evritania" are presented below.

## Product focus

| Established / highly developed | Potential for development / advancement to established / highly developed | Existing or subject to development supportive / secondary |
|---|---|---|
| | Agritourism | Cultural & Religious Tourism |
| | Ecotourism | City Break |
| | Sports & Activities Tourism | MICE |
| | Wellness Tourism | |
| | Gastronomy Tourism | |

## Target markets

### Existing established markets

USA, France

### Existing and / or new target markets for development

Germany, United Kingdom, Poland, Netherlands, Switzerland, Austria, Russia

### Domestic Tourism

# Proposed horizontal Strategic Directions / Actions per strategic area-domain

# Infrastructure improvement & development

The key / most important strategic directions / actions pertaining to the strategic area-domain "Infrastructure improvement & development" are presented below.

| No. | Strategic directions / actions |
|---|---|
| 1 | Attract strategic investors in the context of the concession of the management of the 23 regional airports, upgrade airport infrastructures, attract new flights, and enhance connectivity and accessibility for all Greek destinations |
| 2 | Upgrade and/or construct new port infrastructures, enhance their interconnectivity with other accessibility infrastructures, develop and modify surrounding areas, and upgrade the services provided |
| 3 | Improve / upgrade the interregional and intraregional road network, upgrade border checkpoints at the country's northern borders with Albania, North Macedonia, Bulgaria, and Turkey |
| 4 | Improve and expand the rail network (e.g. Egnatia Railway, expansion of the Suburban Railway of Athens) |
| 5 | Improve and develop urban mobility (e.g. upgrade / expand public transport services, streamline frequency of routes) |
| 6 | Design / implement a combined transport system (road network, airports, ports, and alternative means such as seaplanes, water taxis, but also regular scheduled routes with private coaches) to connect destinations with the main gateway, which can serve to improve connectivity / accessibility for destinations whose access is difficult / time-consuming |
| 7 | Enhance the destinations' friendly profile / level for people with disabilities or reduced mobility (accessibility / full access to entrances, improved access conditions in urban/semi-urban environment for people with disabilities or reduced mobility, etc.) |
| 8 | Enhance health infrastructures, fundamental infrastructures (water supply, waste water disposal and treatment, municipal waste and solid waste collection), and civil protection |

# Tourism product upgrading & promotion

The key / most important strategic directions / actions pertaining to the strategic area-domain "Tourism product upgrading & promotion" are presented below.

| No. | Strategic directions / actions |
|---|---|
| 1 | Develop Regional Destination Management Organizations (DMOs) for each of the 13 Regions of Greece (develop distinct DMOs for the Cyclades and the Dodecanese) and integrate tourism stakeholders in DMOs (duly diversifying depending on the particular features of each destination) |
| 2 | Develop strategic planning for the tourism promotion of the Greek Regions and a comprehensive, cohesive, and targeted tourism promotion and advertising programme for each Region (identification of the USPs for each Region / destination, appropriate promotion and advertising channels, messages, targeted inbound tourism markets and clientele segments, use of modern digital tools, etc.) |
| 3 | Organize and develop Film Offices in each of the 13 Regions of Greece to promote the country as a competitive film destination, attract and facilitate the filming of international cinema and television productions, and develop synergies with relevant organizations |
| 4 | Develop a strategy to enhance and connect the primary and supplementary Greek tourism products with a view to developing unique thematic experiences (Gastronomy, Wine Tourism, Ecotourism, Agritourism, Sports & Activities Tourism, etc.) in each Region / destination |
| 5 | Connect destinations on the basis of location and develop macro-destinations with a view to optimizing the promotion, advertising, and development of products and the attainment of synergies; indicative suggested examples of macro-destinations would be the Peloponnese (Peloponnese Region and the Regional Units of Ilia and Achaia) and Macedonia (Western and Central Macedonia Regions, Regional Units of Kavala, Thasos, and Drama) |
| 6 | Enhance the visitors' travel experience with regard to intraregional connectivity, camper stops on the mainland, information, waiting, and washing/toilet infrastructures at public reception facilities and at transport hubs, the awarding of certificates / signs to businesses / infrastructures, the management of the public at tourism sites, infrastructures for people with disabilities, etc.) |
| 7 | Develop digital info points at the key gateways (airports, ports, border checkpoints) and at central tourism places of interest for each destination with detailed information about the tourism product and the resources of each destination, public services, store opening hours, public transport, etc., 3D interactive maps, and appropriate printed literature |

# Digital upgrading & transformation

The key / most important strategic directions / actions pertaining to the strategic area-domain "Digital upgrading & transformation" are presented below.

| No. | Strategic directions / actions |
|---|---|
| 1 | Develop uniform tourism web portals for the 13 Regions of Greece (with distinct portals for the Cyclades and the Dodecanese) and fully interlink them to other tourism portals and relevant public data bases |
| 2 | Develop digital applications for the tourism sector:<br>• Support tourism businesses to increase the use of digital tools<br>• Develop a single platform for product and service suppliers and providers (Destination Management System)<br>• Develop / expand the digital services provided by public authorities and organizations to citizens and visitors<br>• Develop digital marketing and digital presence on all channels of communication with the consumer public (omnichannel)<br>• Utilize big data analytics and artificial intelligence to ensure better market targeting and demand forecasts<br>• Promote the use of the Internet Of Things (IOT) and the interoperability of systems to provide information and enhance the experience of visitors and businesses on an open access basis for daily routine data produced at the destination |
| 3 | Develop smart applications at select tourism places of interest in the country, promote 5G broadband and provide free Wi-Fi at high-traffic tourism destinations with a view to enhancing the tourism experience, implement a "Smart Tourism Destination" certification programme under the auspices of the Ministry of Tourism, and promote select locations to "smart" destinations (e.g. Athens, Thessaloniki, Crete, South Aegean destinations with increased traffic, etc.) |
| 4 | Create an information mechanism and an intelligent tourism central platform (national Data Hub) to collect, store, process, and analyse statistical data, create visuals, and share data and information pertaining to tourism figures, forecasts for tourism demand in Greece, the early diagnosis of ongoing tourism developments, and the supervision of basic infrastructures which support tourism growth (energy, water supply, connectivity, transport infrastructures, waste water & municipal waste management, safety, health, cultural and natural resouces, etc.) |

# Environmental protection & sustainability

The key / most important strategic directions / actions pertaining to the strategic area-domain "Environmental protection & sustainability" are presented below.

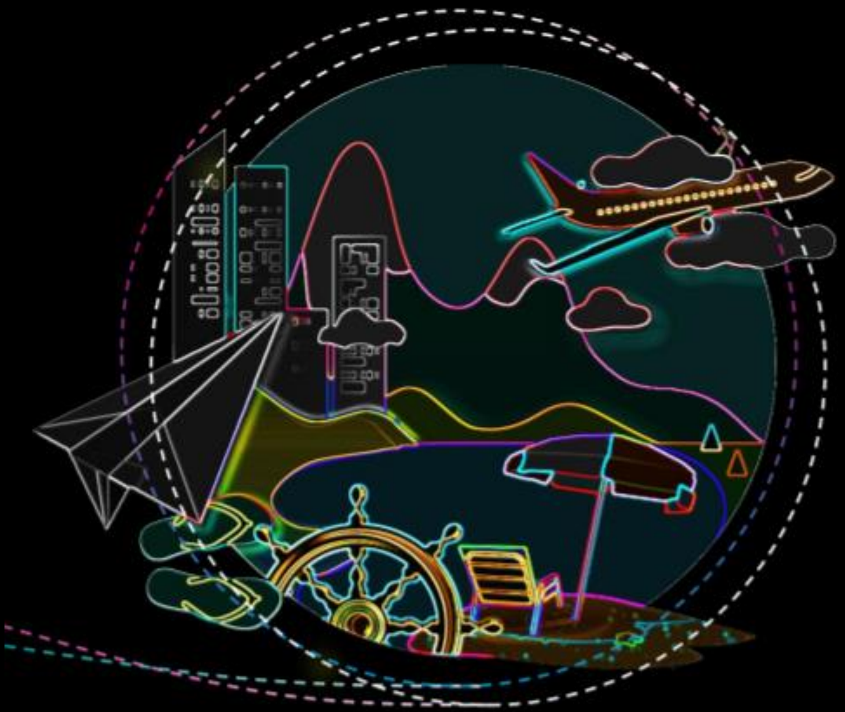
| No. | Strategic directions / actions |
|---|---|
| 1 | Promote Greece to an attractive and sustainable destination through actions including redevelopment, building & zoning regulations, environmental management plans, realization of projects required to optimize waste water and municipal waste management and water and energy management, recording required projects pertaining to climate change, adopting eco-labelling by tourism businesses, phasing out of plastics at island destinations, etc. |
| 2 | Improve Greece's energy profile and promote actions for RES utilization and energy saving through the completion of the electricity management of island destinations, the energy and aesthetic upgrading of public buildings and residences, the creation and development of a smart lighting network, the utilization of available RES without undermining the prospects of the tourism development of destinations and the development of smart energy distribution networks and storage systems, the optimization of the use of energy, natural, and environmental resources, the adoption of practices and technologies which serve the circular economy and the energy upgrading of tourism accommodation |
| 3 | Promote sustainable transport and alternative mobility in Greece's tourism destinations (Sustainable Urban Mobility Plans, modernization of public transport, promotion of the use of electric vehicles and installation of charging points, design and creation of open-air car parks, and optimization of the controlled parking zone system at high-traffic tourism locations, etc.) |
| 4 | Preserve, protect, promote, and showcase Greece's natural & cultural heritage (e.g. adaptation of the type of accommodation and of other tourism related infrastructures to the character of each destination, utilization of the folkloric and architectural / building assets and of the natural beauty areas, enhancement of citizens' protection, raising visitors' awareness) |
| 5 | Support sustainable development, taking into account the capacity of the tourist cities and towns of each destination, and enhance the potential for better management and control of tourist flows (e.g. promotion of town and spatial planning, adherence to environmental terms and containment of excessive building activity, careful delimitation and strict evaluation of the capacity of RES concentration points, development of infrastructures for the protection of the natural environment, protection of NATURA 2000 areas, etc.) |

# Skill enhancement & entrepreneurship development

The key / most important strategic directions / actions pertaining to the strategic area-domain "Skill enhancement & entrepreneurship development" are presented below.

| No. | Strategic directions / actions |
|---|---|
| 1 | Modernize and update the regulatory framework through the establishment of a single regulatory operation framework for each accommodation type and category and of a single health protocol framework |
| 2 | Upgrade the education and training system for those working in the tourism sector through the modernization of tourism educational establishments, primarily the Higher Schools of Tourism Education, the education and training programmes, the certification of tourism professions along the entire tourism value chain, and the selection of specialized teaching staff with constant refresher courses for tutors in educational establishments of all levels |
| 3 | Enhance / support entrepreneurship and the creation of innovative enterprises in tourism:<br>• Promotion of investments to upgrade existing hotel businesses and develop new high-quality and high-capacity units and middle range and capacity hotel infrastructures with innovative concepts and high-quality services<br>• Support of the growth of start-ups which promote innovative products and services in the tourism sector and enhancement of businesses to increase investments which promote the improvement of their economic and energy efficiency<br>• Consultancy support to SMEs in the tourism sector in issues pertaining to market targeting, modern technology and innovation management, outward orientation and networking abroad, development of local and international partnerships, funding, advertising and promotion, etc.<br>• Promotion of the certification of the operations, products, and services of tourism businesses<br>• Utilization of available European / state funding programmes / tools (e.g. NSRF, Recovery Fund) for –among other things– the training of human resources in alternative / thematic products |

# Quantitative goals for Greek tourism & prerequisites for achieving the plan



# Overview of key quantitative goals for 2030 (1)

It is estimated that by 2030 the implementation of the Strategies and Action Plans for the selected indicative destinations can bring about an increase of visits by 27.2%, from 39.3 million in 2019 to 50.0 million in 2030, an increase of overnights spent by 31.9%, from 232.5 million in 2019 to 306.7 million, and an increase of income by 52.4%, from €17.7 billion to €26,9 billion in 2030.

| Total for the country | 2019 | Goal for 2030 | %D | CAGR 2023-2030 |
|---|---|---|---|---|
| Visits | 39,300,819 | 50,000,000 | 27.2% | 3.5% |
| Nights spent | 232,463,747 | 306,642,424 | 31.9% | 4.0% |
| Income (€) | 17,679,915,651 | 26,949,797,525 | 52.4% | 6.2% |
| Average duration of stay (ovrenights stays) | 5.9 | 6.1 | 3.7% | 0.5% |
| Average expenditure per overnight stay (€) | 76.1 | 87.9 | 15.6% | 2.1% |
| Average expenditure per journey (€) | 449.9 | 539.0 | 19.8% | 2.6% |

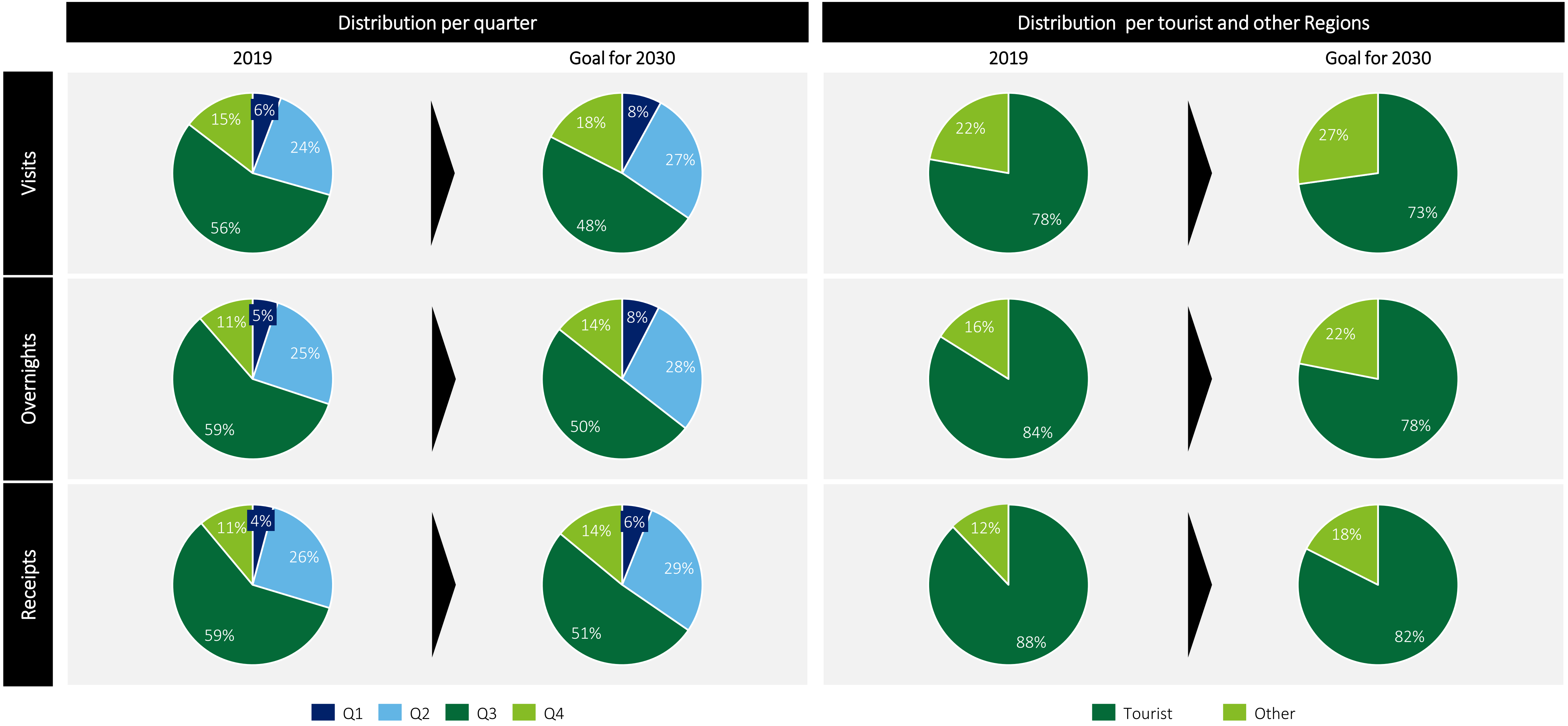
Key assumptions

- Recovery of Greek tourism to the 2019 pre-pandemic levels in 2023
- Absence of any external crisis (pandemic, major natural disaster, terrorist attack, etc.) which could adversely impact Greek tourism in the 2023-2030 period
- Effective implementation of the Strategies and Action Plans which have been developed

- In order for the goals of the Strategy and Action Plans to be accomplished, it is estimated that ~41.5 thousand additional rooms will have to be constructed in all Regions (apart from the North Aegean, Peloponnese, and Central Greece Regions, where it is estimated that no additional accommodation will be required in order for the quantitative goals to be accomplished).
- Given the goals which have been set and the future anticipated needs, the total construction cost for the rooms is expected to come to about €4.8 billion.

# Overview of key quantitative goals for 2030 (2)

Once the Strategies and Action Plans for the selected indicative destinations have been implemented, it is expected that by 2030 a better distribution of tourism activity thought Greece, an extension of the  tourism season and the increase of the average expenditure per journey can be attained.



# Key prerequisites for the successful implementation of the Strategy and Action Plan

Securing the required funds, employing a mechanism to monitor and evaluate actions, and designing a collaborative and flexible operation model among all parties involved at local and regional level are crucial parameters for the successful and sustainable development of each destination.

01 Securing the required funds both for the public and for the private sector

02 Establishment of a mechanism to coordinate, monitor, and evaluate actions, and development of a crisis management and emergency plan

03 Assessment and prevention of exceeding the tourism capacity of destinations

04 Formulation/development of a cooperative culture and of an active participation of the local community, rallying of productive, social, and cultural players of the local tourism economy

05 Promotion of partnerships at local, regional, national, and international level, as well as among tourism stakeholders

06 Support & enhancement by the country's central administration and by relevant competent agencies, and enhancement of mechanisms to inform the broader public

07 Clear allocation of roles, duties & responsibilities among the key players involved

08 Provision of incentives and tools for the active involvement of the private sector, the promotion of innovation, the enhancement of private initiatives, the promotion of partnerships with demand drivers through partnership protocols

09 Fast-tracking of licensing procedures and reduction of bureaucracy both locally and nationwide, with special emphasis on the absorption of EU funds

10 Promotion of Special Town and Spatial Planning Framework for the Tourism sector

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Με τη συγχρηματοδότηση της Ελλάδας και της Ευρωπαϊκής Ένωσης