Destination Management Plan
for Santorini

European Bank
for Reconstruction and Development

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by TEAM Tourism Consulting / Yellow Railroad / Toposophy
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PART 1

EXECUTIVE SUMMARY

1. Executive Summary

1.1. Importance of this DMP to Santorini

This destination management plan outlines how Santorini can ensure a sustainable economy based on tourism over the next 10 years to 2030. It is based on the fundamental principle that Santorini residents should decide how they want tourism to contribute to their economic and social life and environmental conservation over this period. It outlines the steps they can take to achieve this.

In order to understand residents' perceptions, and thereby form a basis for the actions outlined in this DMP, research and consultation was undertaken with a range of local and regional stakeholders, Santorini residents, businesses and visitors, complemented by insights from elsewhere.

1.2. Current Situation and Challenges

Santorini is one of the most iconic destinations in Greece, as a result of its volcanically inspired beauty. The main opportunities and challenges facing Santorini are summed up in its characterisation as an island of "beauty born in anger, threatened by love", whose sustainable future is threatened by its own 'Instagrammable' popularity, with the ever-present threat of overcrowding in particular places at particular times, leading to media articles about increasingly unsustainable visitor pressure.

Santorini is disproportionately dependent on summer season day visitors. The seasonal summer peak is extreme, as is the off-season trough. Of these, general/ferry passengers arriving by sea (including residents, leisure and other visitors) represent the largest single segment, followed by cruise visitors, almost all of whom spend only around five hours on Santorini, and then by international visitors arriving by air, who mostly stay for several days.

The major challenges Santorini needs to address to ensure a sustainable tourism future are: visitor flow management and traffic congestion; infrastructure deficits, particularly the airport, ports, roads, and signage; pollution from cruise ship emissions, landfill and litter; waste management, water and energy consumption; seasonality, including air access and businesses willing to stay open beyond the main season; the quality of the visitor experience, including interpretation at visitor attractions and value for money; the threat to local services and sustainable communities from high-priced tourism demand for accommodation reducing affordable accommodation for residents; and the risk of an almost 'mono-economy' dominated by tourism.

1.3. The Way Forward

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

In support of this aim, the vision for Santorini by 2030 is to become established as an *exclusive, paradise island, recognised globally as a leader in sustainable tourism management, where tourism and agriculture underpin a successful, sustainable economy and vibrant community life, and contribute to the conservation of its cultural heritage and natural environment.*

In pursuit of this aim, the major focus of effort is on addressing main season visitor pressure, by managing visitor flows and reducing congestion at peak times in specific places, and through appropriate infrastructure improvements and development. A secondary area of focus is the extension of the tourism season, by attracting airlines to extend direct services into the off-season, and through the development of new experiences, products and events targeting growth from off-season niche market segments. Underpinning these efforts is a medium-long-term aspiration to attract fewer, but higher-spending, visitors by distinguishing Santorini as a 'paradise island' with an exclusive cachet, which reflects Santorini's unique 'sense of place'.

To achieve this, an extensive action plan has been constructed around six strategic priorities:

- Making Santorini sustainable for the decades to come;
- Managing tourism to ensure residents' quality of life and quality of visitor experience – ensuring that these match the brand;
- Conserving the quality of Santorini's built and natural environment;
- Ensuring Santorini achieves optimum value from tourism;
- Developing new experiences for the off-season, providing a model for attracting higher revenue summer tourism;
- Enhancing the brand, at whose core lies 'romantic gastronomy', supported by cultural heritage and, eventually as a medium-term aspirational characteristic subject to future investment in development, wellness.

1.4. Implementation, Resource Implications, and Governance

A body, or group of committed stakeholders, will be needed to implement this DMP. Three scenario options are set out for the governance of such a body. Once established, it will then be up to this body to prioritise the actions they wish to pursue from the current action plan (Annex 1) and to raise the necessary resources – both financial and human – to undertake those activities.

1.5. Monitoring and Critical Success Factors

Recommendations are included within the action plan (Annex 1) for monitoring progress of the DMP.

Critical to achieving this sustainable tourism future for Santorini are the following: stakeholder collaboration; securing residents' understanding and commitment to sustainable tourism; extending the season; commitment to improving visitor flow management, including addressing infrastructure inadequacies, particularly airport, ports, roads and parking; commitment to improving the visitor experience and communicating a strong 'sense of place'; resolving environmental issues including sustainable energy usage, waste management, water consumption, and pollution caused by cruise ship emissions, landfill and litter; ensuring adequate availability of affordable housing for residents; and the ability to raise sufficient funding and deploy appropriately skilled human resources to address the issues identified in this DMP.

In summary, this DMP is a roadmap to the future, which contains an extensive action plan. It will be up to those responsible for implementing the action plan to decide which activities they will undertake and how they wish to prioritise them, in light of available resources. It is critical that this DMP is seen as a 'live' plan to guide action, which is revised and updated as circumstances change. In order to achieve optimum impact, it should be shared with key stakeholders in Santorini. They should be updated on progress, with challenges clearly articulated, successes highlighted, and community participation called for where needed. This will be important to secure widespread buy-in across the island, which will be essential to ensure a sustainable future for tourism in Santorini. As a roadmap to Santorini's future, this DMP will only be as valuable as the level of commitment to it by stakeholders – to its implementation and to keeping it 'live', updated and relevant.

PART 2

INTRODUCTION

2. Introduction

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

(i) Increase the average spending of visitors;
(ii) Lengthen the season; and
(iii) Implement sustainable practices where "over-tourism" is becoming a concern.

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

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

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

PART 3

THE ROLE AND VALUE OF DESTINATION MANAGEMENT PLANNING

3. The Role and Value of Destination Management Planning

3.1. Destination Management as the Basis for Sustainable Tourism

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

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

The starting point for effective destination management is Destination Management Planning.

3.2. Destination Management Planning

Destination Management Planning is a process that enables people in a destination to decide how they want tourism to contribute to their economic and social life and take steps to achieve this. Quite simply, at its core, destination management planning is about people working together in a defined area to develop a plan, which satisfies visitor desires and delivers sustainable benefits for the community.

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

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

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

In Greece, destination management (and marketing) remains a largely fragmented policy area due to a lack of tools to enable the establishment of effective organisations, growing pressure on financial resources following the economic crisis, and occasionally due to the limited capacity of local industry stakeholders to collaborate effectively.

Several different schemes have been tested over the last decade (e.g. committees of tourism promotion, special purpose entities, development companies under municipalities) among both major and less developed destinations in Greece. Despite constraints, these initiatives have enabled a better understanding of the tourism sector's complexity and enhanced local communities' awareness of tourism benefits. This has stimulated a more systematic dialogue between public authorities and key actors in the private sector and gradually led to initiatives such as '*This Is Athens & Partners*', which includes the combined forces of The City of Athens, Aegean Airlines, Athens International Airport and the Greek Tourism Confederation (SETE). *This is Athens & Partners* is further elaborated in the analysis of resource implications and governance in Chapter 7.

3.3. The Approach to Destination Management Planning in This Report

The approach taken in this report is to address three key questions:

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

And it is underpinned by four core principles:

- Targeting those visitors who will provide the greatest benefit to the destination, in terms of spend, length of stay, season of visit, propensity to travel beyond the 'honeypots', and, most importantly, their (responsible) behaviour in the destination;
- Developing the destination, its infrastructure and tourism products and experiences, so that it appeals to those visitors who will provide the greatest benefit to the destination;
- Identifying and managing any potentially negative impacts of tourism before they damage the place or undermine community cohesion;
- Securing residents' understanding of tourism as a driver of the local economy, social cohesion, and environmental conservation, so that they welcome visitors and commit to tourism as an important and positive contributor to their daily lives.

3.4. Destination Management Trends and Context

Destination management, which focuses holistically on all aspects of the destination, from a strategic, evidence-based approach, through product and experience development to sales and marketing is a key transformational opportunity for destinations. Destinations International (2017)[3] has defined the following as critical roles for effective destination management:

- Curators of destination content;
- Activists in community in place making;
- Catalysts of economic development;
- Adopters of business intelligence & data science;
- Collaborators within strategic networks.

Among top destinations, the rise in visitor numbers, often accompanied by too many people in one place at one time, leading to environmental or public realm degradation, residents' intolerance, dilution of the visitor experience, which is exacerbated by inadequate visitor management, has cast doubts on the traditional mission of destination marketing. A report by European Cities Marketing in 2017[4], proposed that destination marketing organisations who wish to be part of the future should consider how destination management might:

- Enable social sustainability by engaging more closely with local communities;
- Guide a smart approach to place-making, by managing carefully the most authentic elements of destination brands and maintaining the attractions of 'liveability' and 'localism';
- Extend the benefits of tourism beyond the main hotspots by helping people to move, learn, meet, relax and integrate;
- Provide alternative options for the allocation of public funds derived mainly from bed taxes (Destinations International, 2018)[5];
- Shape a more inclusive agenda for public-private partnerships such as Tourism Improvement Districts, an industry-led funding model in which tourism businesses commonly contribute to a fund and destination organisations have the jurisdiction to manage funding and implement a dedicated programme of destination management

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

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

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

and improvement (University of Greenwich and Association of Town and City Management, 2016)[6];

- Clarify priorities for the smooth integration of the collaborative economy in contemporary destinations;
- Create solutions both for visitors and residents through the use of new technologies;
- Set the foundations for quick response and recovery in case of emergency or disaster.

In 2018, European Cities Marketing[7] proposed ten tools, which represent a range of approaches destination organisations can use to make the most of tourism growth:

- Strategy formation, city planning and zoning;
- Public education;
- Forming partnerships;
- Managing the collaborative economy;
- Smart marketing;
- Taxes, caps and limitations;
- On-the-ground visitor management;
- Measurement and monitoring;
- Technological solutions;
- Dialogue and consultation.

In two reports in September 2018 and March 2019[8], the United Nations World Tourism Organization (UNWTO) identified 11 strategies and a range of destination management solutions that are being implemented by 19 cities across the Americas, Asia/Pacific and Europe:

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

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

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

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

PART 4

WHERE IS SANTORINI TOURISM NOW?
THE SITUATION ANALYSIS

4. Where is Santorini Tourism Now? The Situation Analysis

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

Key political, economic, social technological, environmental and legal issues with particular relevance for Santorini are as follows:

Political

- A newly elected Mayor took charge in Santorini in September 2019, based on the results of May's elections, while the national government also changed following the national elections that were held in July 2019. In Greece's political environment changes in leadership traditionally affect the pace of policy decision-making. This is a factor to keep in mind when dealing with a dynamic policy area such as destination management.

- Recent airport privatisation (FRAPORT) underlines both the need and opportunity for improvements in capacity, service quality, and basic infrastructure at Santorini (Thira) International Airport.

- The Greek Tourism Ministry's recently stated focus on developing health and wellness tourism[9] offers opportunities for the development of visitor products, which would contribute to the repositioning of Santorini's image as an exclusive 'aspirational' destination. This new Ministry focus is part of a wider diversification of Greece's tourism sector through thematic and special interest tourism, an agenda reinforced by a bill (4582/2018) passed by the Greek Parliament in late 2018 (see also L-Legal in PESTEL).

- In February 2019, an inter-ministerial committee for strategic investments gave the go-ahead for the development of a new marina and recreational boat shelter at the area of Monolithos. The marina (€40m budget), will have 350 berths up to an unspecified superyacht size and will be run by the Municipal Port Fund.

- A project launched in partnership with Diazoma Association in 2018 includes a proposal for a destination management / marketing organisations. It suggests the transformation of Geothira to a DMO with greater jurisdiction and various sources of revenue (e.g. from commercial activities, registrations, sponsorships, EU programmes).

- In April 2019 a working meeting between representatives of the Municipality of Santorini and Cruise Lines International Association (CLIA) reviewed the sustainable development of cruise tourism, following last year's launch of a berthing management system as a means to regulate the number of incoming cruise ships along with a cap of 8,000 cruise passengers per day.

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

- The Greek Tourism Ministry is going to define priorities for tourism-related projects supported by EU funding during the 2021-2027 programming period. So far in the 2014-2020 programming period, 133 projects with a total budget of €32M have supported the accommodation sector, travel agencies, car rental companies and activity providers in Santorini. These projects involve two actions of the Operational Programme Competitiveness, Entrepreneurship and Innovation 2014-2020 (EPAnEK) (data kindly provided by the Ministry of Economy and Development – Special Secretary for ERDF and CF – Managing Authority of EPAnEK):
  - 71 projects with a total budget of €10.5M under the action 'Strengthening SME Tourism for Modernizing and improving the Quality of their Services';
  - 62 projects with a total budget of €21.5M under the action 'Supporting the Establishment and Operation of New SMEs in the Tourism Sector';

  More information on initiatives undertaken by the Region of South Aegean and the Municipality of Santorini are included in section 4.8 (Policy Context)

Economic

- As one of the most tourism-dependent islands in one of the most tourism-dependent regions in Greece (South Aegean), the global growth in tourism presents challenges for Santorini in managing future growth to ensure sustainable economic benefit for the island.

- Santorini's disproportionate dependence on tourism has resulted in an almost 'mono-economy'. Historic and contemporary agricultural production indicates an opportunity to introduce a degree of diversification and establish a healthier economic base by expanding the agricultural proportion of the island's economy.

- The recent collapse of Thomas Cook, one of Europe's largest and oldest travel companies, will have significant effects on the Greek tourism industry, as a result of its high level of exposure to both the outbound UK market and to Thomas Cook specifically. The company is believed to have employed c. 1,000 people in Greece and brought c. 3 million tourists to the country, 9% of the total 44 million arrivals to Greece in 2018[10]. Of Greece's 9,917 hotels, 12% (1,193) held partnership deals with the Thomas Cook Group in 2019[11], of which 48% of are in the 1-3 star categories. Areas most affected are the South Aegean and Ionian islands, not least Crete, where 80% of the island's hotels[12] had contracts with this company. Greece is expected to lose c.610,000 inbound airline seats[13], of which about 61,000 in Rhodes. According to the Hellenic Chamber of Hotels, the impact on the Greek tourism industry of losses of arrivals and overnight stays resulting from the Thomas Cook collapse is expected to amount around €1 billion in 2020. The full extent of damage will be calculated by the Greek government[14] by the end of 2019.

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

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

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

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

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

Social

- Changing consumer tastes emphasise the opportunity for Santorini to focus on attracting the type of visitors (e.g. higher yield), who will provide greatest benefits for, and inflict least negative impacts on, Santorini.

- Related to the previous point, with almost a third of the global population projected to be over 50 by 2025, there is a major opportunity for Santorini to attract relatively affluent, active seniors who wish to take better care of their health, appearance and wellbeing. Those who travel internationally have significant discretionary income to spend and are flexible regarding the timing of their trips – offering greater potential in autumn and spring, rather than in the busier, hotter summer.

- The significant growth of the availability of, and demand for, short-term rentals in Greece has significant implications for rising housing costs, which could threaten essential services and threaten community cohesion reducing access to affordable residential housing.

- The luxury market is expected to grow significantly worldwide. It is forecast to grow at a compound annual growth rate (CAGR) of 7.9% by 2026. Estimates suggest an almost doubling in value, from $891 billion in 2018 to $1,614 billion by 2026. Europe and America accounted for the largest segment of this market in 2018 at 63%.[15] In terms of type of travel, 'adventure and safari' travel lead this market, but they are followed by 'culinary and shopping' and 'small group journeys' as the next most dominant segments.[16] This again reinforces the opportunities underlying Santorini's proposed focus on affluent travellers and its drive to become an 'aspirational' destination.

Technological

- Technological developments may offer useful opportunities for Santorini to manage visitor flows and spread traffic in the peak season more effectively than at present (e.g. apps offering 'real time' information to aid travel, itinerary and passenger movement planning and encourage specifically timed, advance booking).

- Similarly, technological developments in cruise ship design, propulsion (e.g. liquefied natural gas- LNG), waste management, emissions control, and wastewater treatment should enable Santorini to reduce the environmental impact of cruise ships entering the caldera.

- The rapid growth in availability and sophistication of 'big data' will help destinations target their desired audiences more precisely and cost-effectively through increasingly focused marketing. This will be valuable to Santorini, as it focuses more specifically on its best prospects, who will appreciate its 'aspirational' qualities.

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

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

- Similarly, the rapid expansion of social media offers cost-effective opportunities for Santorini to spread its key marketing and public information messages through visitor engagement, user-generated content, and third-party endorsement. However, as has already been seen, with the hashtag #Santorini appearing in over 5 million Instagram posts, there is also a significant downside to this easy popularity – hence the need for Santorini to attempt to influence some of the content to focus its messages and help visitors make informed decisions about when and where to visit – and thereby reduce peak time pinch-points – where it can.

Environmental

- Increasing consumer awareness of the contribution of tourism to global carbon dioxide (CO_2) emissions, together with the actions of governments and international institutions to reduce those emissions, will impact increasingly on travel decisions in the future, in terms of how, when and where people travel and the activities they undertake. A variety of other globally widespread concerns about the environment in general and the environmental impact of tourism (e.g. waste management generally; water pollution from plastic waste and cruise ship emissions) may also increasingly affect consumer choice of destinations. To contribute to the global solutions and to secure its tourism future, Santorini should consider taking action towards becoming a zero-carbon destination.

- Pollution from cruise ships needs to be addressed through measures to reduce emissions in the caldera. (See also *Technological* above.)

- Waste management is a critical issue for the island, which is exacerbated by further visitor-generated pressure, particularly during the main season.

- Like waste management, water consumption is a critical issue for the island, which is exacerbated by further visitor-generated pressure, particularly during the main season.

- Visitor congestion at certain times threatens both the visitor experience and sustainable future of Santorini as a tourism destination.

- Concern for the environment is contributing in some countries to changes in travel behaviour. "Flygskam", or "flight-shaming" is a movement that is gaining traction as climate change awareness increases. This Swedish word has entered the world's vocabulary and, according to a recent UBS survey[17], could trigger a change in flying habits in wealthier parts of the world, particularly in the US and Europe. High-profile campaigns – such as the example set by Swedish schoolgirl Greta Thunberg, have helped push the climate crisis up the political agenda. After surveying more than 6,000 people in the US, Germany, France and the UK, UBS found that 21% had reduced the number of flights they took over the last year. Social pressure is likely to increase people's commitment to reducing their individual carbon footprint, of which leisure travel is seen as one of the most discretionary expenditures.

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

Legal

- Restrictions on short-term rentals, such as Airbnb, which are being considered and currently applied in several world cities, may need to be reviewed to address their social impact, particularly where they risk distorting the local housing market and restricting the ability to attract socially essential workers (e.g. teachers, doctors et al).

- In December 2018, the Greek Parliament passed a new bill (4582/2018), which sets standards for the development of cultural, religious, health and wellness, agri-, food and wine, sports, city and educational tourism. It is a matter for further examination whether special facilities in Santorini have been incorporated in the accreditation systems for wine tourism[18] and agri-tourism[19], and if the most recent bill will encourage something similar for additional businesses (e.g. accreditation for businesses specialised in sports tourism).

- Current laws in Greece limit the options in respect of the formation of public-private partnerships, which are conducive to developing, managing and marketing tourism, along the lines suggested in this report. Whilst mechanisms can be found around this problem, as has happened in Athens, continuing attention must be given to enabling more direct partnership options. It will be in the interests of Santorini to help shape future options.

- The government's proposed lifting of capital controls in 2019 may generate opportunities for Santorini to attract investment in critical areas, from infrastructure development to new products compatible with Santorini's aspiration to attract more higher-spending visitors.

4.2. Greek Market Context

International arrivals in Greece almost doubled from 2012 (15.5m) to 2018 (30.1m excluding cruise passengers). This performance has already exceeded McKinsey's (2017)[20] earlier forecasts for inbound visitor arrivals in Greece by 2020. It also put Greece in the 13th position of UNWTO's global ranking in 2018[21].

The direct contribution of tourism varies significantly among regions. The total (direct and indirect) impact of travel and tourism to Greece's GDP accounts for 20.6% (WTTC, 2019). But it is important to distinguish between the sector's national performance and its differential impact at a regional level. In 2014, there were 3 areas where the direct (exclusively) contribution of tourism exceeded by far the national average of 9.5%: the

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[18] Law: 4276/2014 & Inter-ministerial Decisions: 1746/2015 & 13143/2018.

[19] Inter-ministerial Decisions: 543/34450/2017 & 15258/2018.

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

[21] UNWTO (2019b) International Tourism Highlights of 2018.

Region of Crete (47.3%), the Region of Ionian Islands (65%) and the Region of South Aegean (69.5%)[22].

Tourism is a major driver of employment in the Region of South Aegean. Hotels and other accommodation establishments in the Region of South Aegean involved the highest number of employees – though seasonal many of them – over a 7-year period (2011-2017). For 2016-2017, restaurants and catering services was the economic sector with the second highest number of employees (Labour Market Diagnosis System, 2018).[23]

Santorini saw the second highest growth rate (after Mykonos) of Greece's ten main international airports from 2012 to 2018. Santorini (Thira) International Airport welcomed more than half a million international air arrivals in 2018, marking a growth rate of +153.3% compared to 200,000 arrivals in 2012. However, high seasonality and the shrinking share of domestic tourism have overshadowed this positive performance. Only 20% of hotels across Greece had a monthly occupancy higher than 80% in May 2018, while the respective share in August 2018 was 65%. Also, the economic crisis has had a severe effect on domestic tourism. In 2017, hotel overnights by domestic visitors accounted for only 16% compared to 26% in 2010 (Hellenic Chamber of Hotels, 2019)[24].

Greek destinations need to address the challenge of heavy pressures in certain places at certain times. There are 13 Regions in Greece, but almost 85% of tourism activity is concentrated only in five Regions. In two of these Regions (South Aegean, Attica) there are 3 destinations (Rhodes, Santorini, Athens) that are thought to face time- and place-specific challenges due to indicator results concerning bed-night density (number/km2), bed-night intensity (number/citizen), and air-transport intensity (pax per bed-night)[25]. Of particular relevance to Santorini are the aggregate indicators of tourism density rate (TDR, number of visitors per km2 per day) for each type of destination and the average tourism penetration rate (TPR, number of visitors per 100 inhabitants per day).

The growing number of arrivals from Eastern European countries and the trend towards a shorter duration of stay (from 9.1 days in 2012 to 7.5 days in 2018) have resulted in reduced average spending per international traveller (from €646 in 2012 to €520 in 2018). However, the resilient performance of traditional markets has contributed to a steady

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

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

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

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

average daily spending (from €71.1 in 2012 to €69 in 2018). For SETE Intelligence (2019)[26], key priorities for increasing average spending in the long-term are:

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

Greece's tourism product has five key assets (hospitality of locals, quality of accommodation, feeling of security, local food and landscape beauty), which outperform the tourism product of competitor destinations in southern Europe. However, according to a post-visit survey of travellers who visited Greece during the 2015-2017 (SETE Intelligence, 2019)[27], Greece lags behind its competitors in visitor experience elements (e.g. cultural experience, shopping experience, evening and night activities) and destination management issues (e.g. cleanliness, airport access, road infrastructure, visitor information). These do not apply equally throughout Greece; and those that are critical to Santorini are addressed below in this DMP.

4.3. A Review of Santorini's Tourism Industry

Products, Experiences, Infrastructure

Accommodation

Hotels: Santorini has a total of about 287 hotel units and 7,145/14,045 rooms/beds. Just over half the island's hotel bed capacity is in 4- and 5-star units (53%). Hotels are generally small-medium, with the average number of rooms/beds per hotel being 25 rooms/49 beds.

Higher-rated hotels are only slightly smaller than others, with the average number of rooms/beds in 5* hotels being 37 rooms/74 beds; and in 4* hotels, 27 rooms /53 beds; whereas 1* + 2* hotels have 21 rooms /41 beds / on average. (Based on data from the Hellenic Chamber of Hotels).

[26] INSETE (2019b) Benchmarking the Greece Brand Experience.

[27] INSETE (2019b) Benchmarking the Greece Brand Experience.

Overall accommodation capacity estimates for Santorini are as follows:

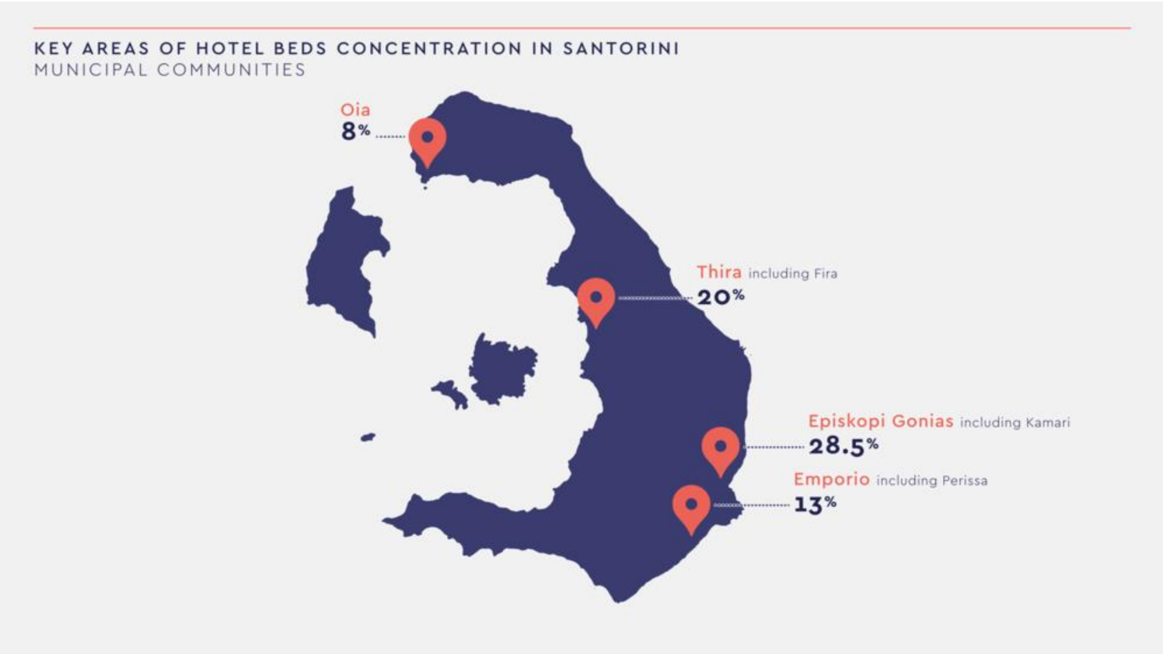
Hotel beds in 2019 (all)	14,045
5* Hotel beds	2,659 (19%)
4 * Hotel beds	4,766 (34%)
3* Hotel beds	2,955 (21%)
2 * Hotel beds	2,637 (19%)
1 * Hotel beds	1,028 (7%)
Furnished rooms and apartments	22,099
Tourist villas	3,619
Short term rentals (3,300 units x 4.5 pax)	15,000

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

Higher-end hotels are growing at a faster rate than lower grade hotels. Between 2012 and 2018, the number of 5* hotels increased by 134% and of 4* hotels by 7.5%. The combined number of beds in 4* and 5* hotels also increased by 54%; whereas in the same period, the number of 3* beds increased by just 28%.

The geographical distribution of hotel capacity (beds) among the municipal communities of Santorini is as follows (based on data from the Hellenic Chamber of Hotels):

4.3.1. Key Areas of Hotels Beds Concentration in Santorini



Short term rentals: There are about 3,300 listings. Hosts with multiple listings account for almost 87.5%; and entire homes/apartments account nearly for 73% of total listings; private rooms for the rest (27%). (Based on data from Inside Airbnb and Airdna for May 2019).

Tourist Villas: There are 600 units offering 3,619 beds. More than half the villas offer 6-10 beds (51%), while 30% offer 2-5 beds. (Based on data from the Register of the Ministry of Tourism).

Furnished rooms and apartments: There are 1,983 units offering 9,516 rooms and 22,099 beds. The average number of rooms per unit is 5.

Restaurants: There are 543 listed restaurants, of which 10% offer fine dining (Based on Trip Advisor listings).

Attractions: The main culture and nature-based attractions reviewed by TripAdvisor (according to evidence collected in May 2019) are shown in the following table. Their popularity is indicated by the number of TripAdvisor reviews for each attraction.

Attraction	Reviews	Attraction	Reviews
Sunset in Oia	8,650	Byzantine Castle Ruins	518
Akrotiri Archaeological Site	4,894	Monastery of Profitis Ilias	369
Ancient Thera	2,114	Archaeological Museum Fira	286
Volcano	1,974	Hot Springs	228
Museum of Prehistoric Thira	1,732	Tomato Industrial Museum	209
Lighthouse	952	Megaro Gyzi Museum	93
Wine Museum	533	Lignos Folklore Museum	92
Saint John Baptist Cathedral	533	Venetian Castle	54

Beaches: Six of Santorini's beaches have Blue Flag status, all on the east coast, as shown on the map.

Events: Key events on Santorini are[28]:

- **Santorini Experience:** swimming and running race (Oct)
- **Re-enactment of the volcanic eruption:** fireworks display and concert featuring prominent Greek artists (late August).
- **"Halaria":** Sports competition in memory of local athlete Emmanuil Halaris.
- **Traditional Wedding:** Akrotiri organises a mock traditional Santorini wedding (summer).
- **Good Friday:** In the village of Pyrgos, locals ignite hundreds of tins stuffed with petrol-soaked rags as the Epitaphios icon is carried in procession through the village.

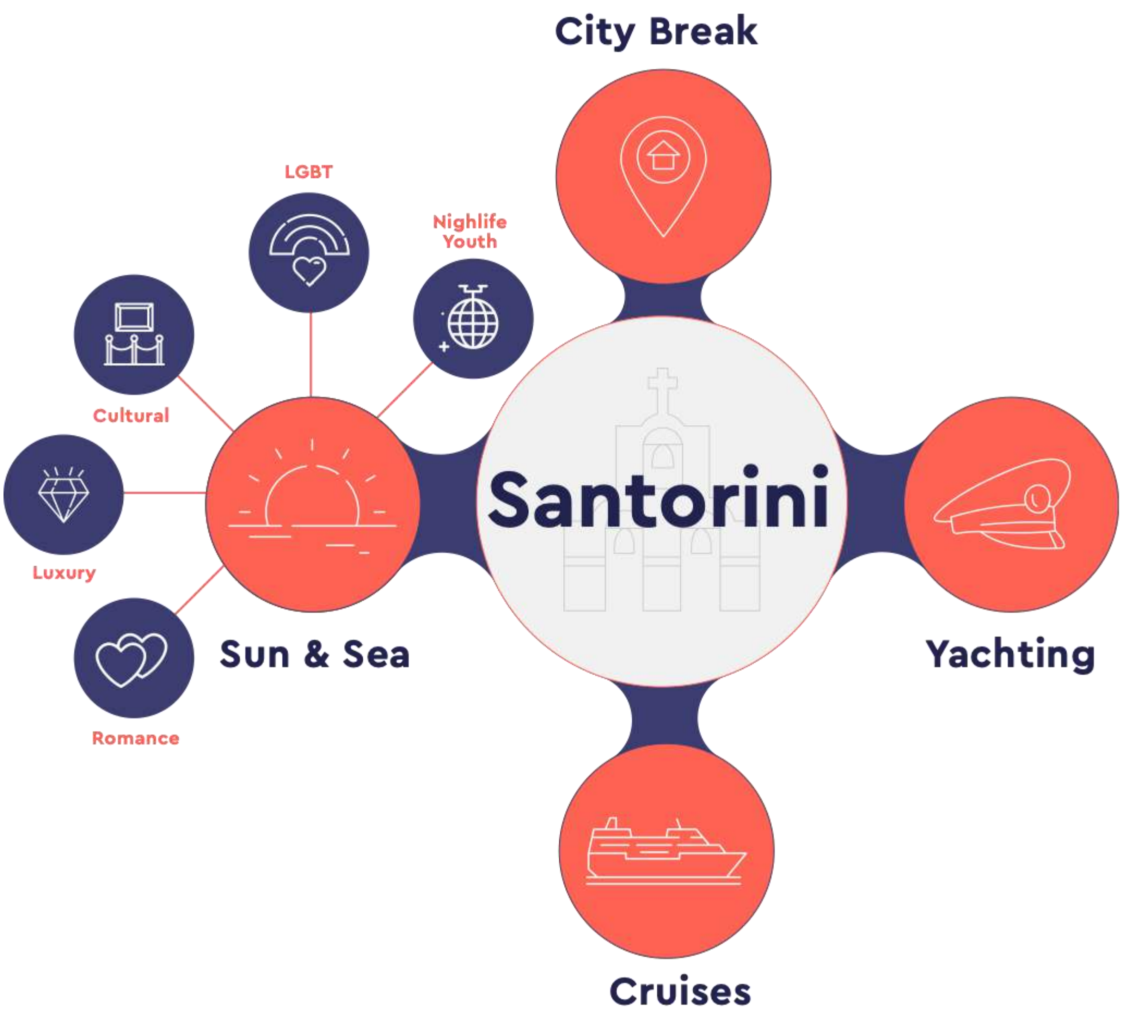
[28] For details, see: https://www.e-kyklades.gr/travel/tourism/santorini?lang=en.

- **The burning of the Ovrios:** On Easter Sunday, many villages organize mock popular courts that sentence to death, and then burn an effigy, the Ovrios (a rag doll in human form).

- **Paniyiria:** Santorini is renowned for its paniyiria, folk festivals combining the observance of religious feast days with a communal feast featuring food, wine, and music.

The South Aegean Region's Tourism Product Marketing Plan Roadmap 2015-2020[29] identified 2 key products for Santorini: sun and sea; and city breaks. Maritime tourism was also identified as playing a crucial role, along with a variety of supplementary experiences. Additionally, special products under the dominant product of sea and sun included: luxury, culture, nightlife, romance, LGBT. The diagram below summarises the report's analysis.

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



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

Current Investment Plans

Plans for tourism-related investment and infrastructure improvements in Santorini, which will benefit the tourism sector, include:

- Development of a cultural route for Santorini;
- Construction of airport road– Fira – Vourvoulo – Oia; €5.9M (EU funds);
- Water supply of Emporio; €3.8M (EU funds);
- Upgrading of wastewater treatment plant; €3.3M (EU funds);
- Expansion / modernisation of desalination unit; €2.7M (EU funds);
- Protection of the coastal zone of Kamari; €1.8M (EU funds);
- Digital Guide to the culture and events of Santorini - €110K;
- Integrated Multi-Channel Passenger Information System for Public Transportation in Santorini - €151K - This project is funded through INTERREG;
- Water supply of Exo Gonia. €927K (EU funds);
- Geothira Sole Shareholder S.A. has the mandate to administer the geological park surrounding Santorini's volcano and a series of other sites (e.g. thermal springs, a small number of beaches).

Quality Levels and Issues

The quality of visitor products and experiences is critical to visitor satisfaction, which in turn can influence the decision whether or not to return and the way in which visitors talk about Santorini to friends.

In terms of quality **accommodation and restaurants**, Santorini scores well:

- Just over half the island's hotel room capacity is in 4- and 5-star units (52%);
- Santorini saw a 134% increase in 5-star hotels between 2102-2018;
- 70% of Santorini's restaurants offer fine dining.

While quality is not restricted to high-end establishments and is important at all levels, the number of higher-graded hotels and fine dining restaurants support the aim, articulated later in this DMP, to position Santorini as an aspirational and exclusive destination.

Interpretation at visitor sites, particularly cultural and historic attractions, could benefit from more creative and informative treatment, using modern techniques to bring the past to life.

Similarly, the availability and presentation of **visitor information**, from tourist attractions to bus timetables, could be improved.

The **excursion offer** (e.g. caldera excursions to Nea Kameni and Palea Kameni) varies from semi-private tours in small vessels to mass groups on larger boats, with the former offering a more intimate experience more in keeping with Santorini's positioning as an exclusive destination.

Port facilities at both Athinios and Fira are rudimentary and not suited to the numbers of passengers that use them.

Skills

The proliferation of uncertified **tourist guides** in the main season suggests a need for both training and quality assurance.

With regard to **language skills**, it may be unrealistic to expect Santorini-based guides to master certain complex, less frequently required languages spoken by limited numbers of visitors. Nevertheless, particularly where guides are recruited from elsewhere, the need to provide basic quality standards for all guides should be addressed, ideally through a quality certification system.

No major skills deficits were identified in other areas during research and consultation with Santorini businesses and local stakeholders. This does not mean there are no areas in which an improvement in tourism-related skills is required. It may reflect a predominance of small, largely family-owned businesses, focused on service delivery during a relatively short season.

However, identifying **skills development needs** will become increasingly important, as Santorini strives to differentiate itself as an exclusive destination in an effort to attract higher-spending visitors.

4.4. Destination Performance Assessment

Total Visitors

Santorini received a total of 2.85 million arrivals in 2018[30]. These include all types of arrivals – i.e. visitors and residents, tourists and business travellers. They were split relatively evenly between arrival by air and sea as follows. Significantly, the largest number of international leisure visitors would appear to arrive on a cruise.

By air: 1,070,000, split as follows:

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

By sea: 1,779,000, split as follows:

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

International Arrivals

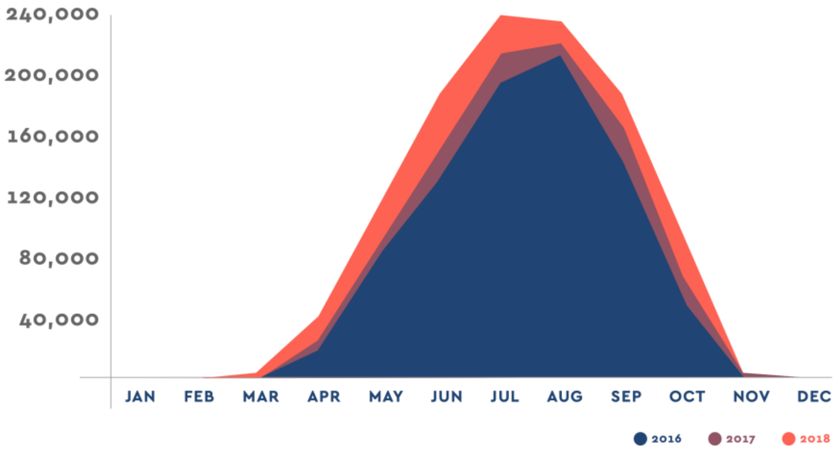
In 2018, international air arrivals increased by 62% compared to 2016, adding 61,000 visitors to Santorini's annual performance. (Based on data from INSETE and Fraport Hellas).

Seasonality is a long-term challenge for Santorini, as it is for other islands. The monthly figures of international air arrivals over the past three years are shown in the following diagram. They show the number in April – June grew disproportionately, but the months November to March continue to have virtually no direct international air arrivals. However, encouragingly, October was particularly positive for Santorini with a growth of 61% from 2016 to 2018 (32,000 additional visitors).

Nevertheless, this summer seasonal peak of visitors represents a major challenge to the commercial sustainability of the tourism industry; but also, a major opportunity to stimulate off-season growth, as identified later in this report.

[30] Sources: Hellenic Statistics Service for Ports / INSETE & FRAPORT.

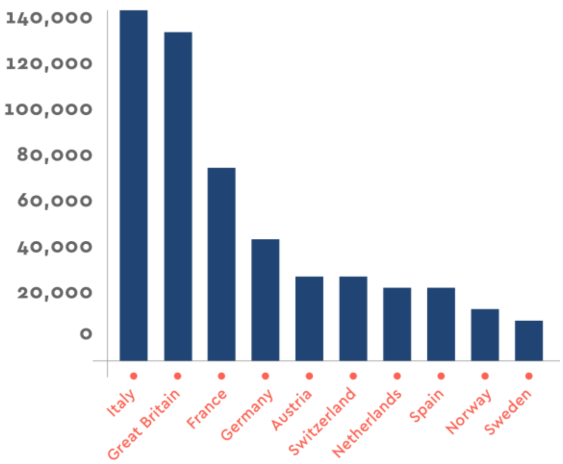
4.4.1. International Air Arrivals (Monthly) at Santorini Airport (2016-2018)[31]



As regards the countries of origin:

- **Italy and Great Britain** represent by far the largest source markets by air, together accounting for 51% of international arrivals (via international flights) at Santorini airport in 2018. Italy is the largest air market (26%), with UK only slightly behind (25%);
- **France** was the third largest market in 2018, but with significantly lower numbers, at 14%;
- The **Nordic** markets and **Germany** each accounted for 7%;
- Other key markets were **Austria** (4%), **Switzerland** (4%), **Spain** (3%), and **Netherlands** (3%);
- Among top markets, only Austria (-11.1%) and Switzerland (-0.6%) saw a decline in 2018 (c.f. 2017);
- Although their numbers are not recorded, the **USA** is also an important market for Santorini, according to several businesses interviewed, with most staying visitors coming on domestic flights from Athens.

4.4.2. Top 10 International Markets at Santorini Airport in 2018

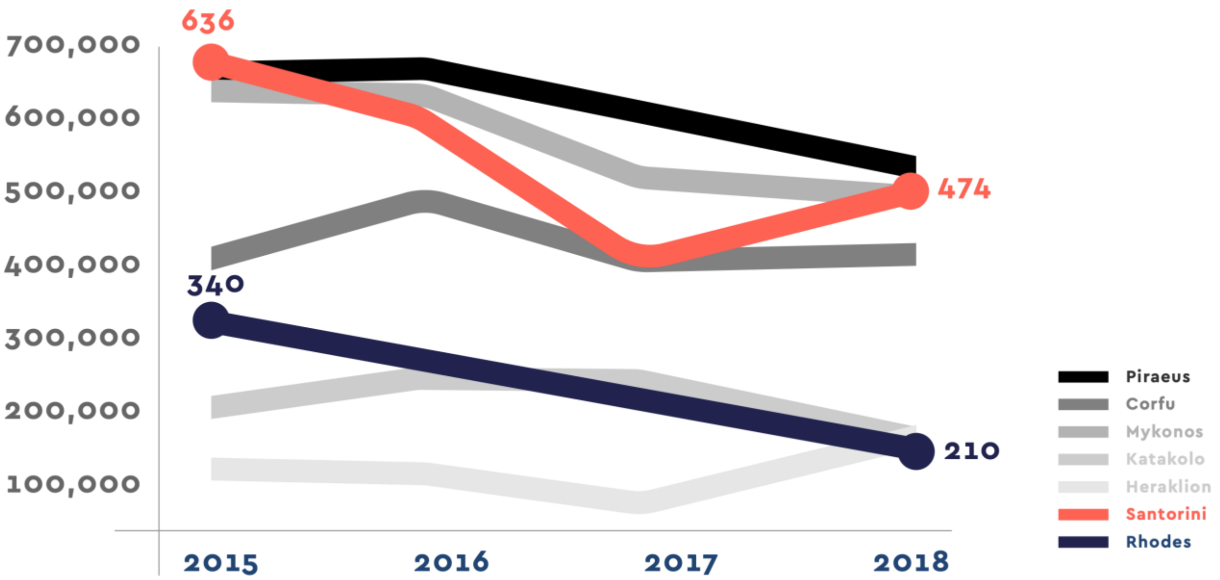


[31] Source: FRAPORT.

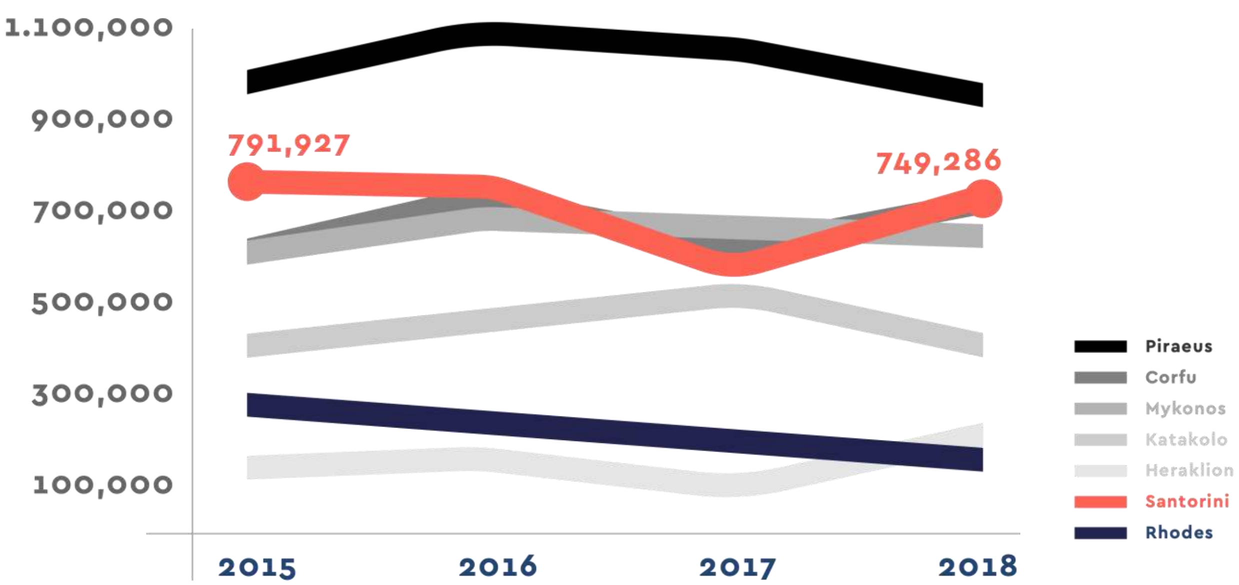
Cruise Ships and Passengers

Based on the ranking of cruise tourism destinations across the Mediterranean by Med Cruise, Santorini occupied the 10th position in terms of cruise passenger arrivals. Over the years 2015-18, Santorini saw a significant decline in the number of cruise ship visits (-25%: from 636 ships in 2015 to 474 ships in 2018) and a modest decline in cruise passengers (-5%: a drop of 42,641 passengers), although Santorini bucked the trend with a sharp upturn in 2018. (Based on data from the Hellenic Ports Association).

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



4.4.4. Traffic of Cruise Passengers among Top Destinations in Greece (2015-2018)



Hotel Usage

International visitors represent by far the lion's share of hotel occupants on Santorini at c. 93%, versus domestic visitors, who represent only c. 7% of all hotel occupants.
(N.B. 2017 statistics reflect the performance of only 49% of beds in Santorini in 2017. The same share for 2018 is 53%.)

International visitors: In 2017, 173,864 international visitors were checked into hotels, for a total of 586,316 overnights, representing an increase of almost 70% over 2012. Average length of stay remained at about 3.5 nights. International visitors accounted for 93% of all hotel overnights. The growth trend continued in 2018, with 218,673 international visitors checking into hotels, for a total of 693,178 overnights (average length of stay: 3.1 nights; share of hotel overnights by international visitors: 92.7%).

Domestic visitors: In 2017, 13,774 domestic visitors were checked in to hotels, for a hotel of 36,410 overnights, representing an increase of 1.5% over 2012. Average length of stay reduced slightly to 2.3 nights. Domestic visitors accounted for just 6% of all hotel overnights. The numbers of domestic tourism increased in 2018, with 20,721 Greeks checking in for a total of 54,587 overnights (average length of stay: 2.6 nights; share of hotel overnights by domestic visitors: 3.2%).

Hotel occupancy for the months of opening increased slightly from 42.8% in 2012 to 48.3% in 2017 and 50.7% in 2018. This highlights Santorini's reliance on international visitors (c.93%) and overall low occupancy rates (c.43%).

N.B. Hotel rooms account for perhaps around half to one third of visitor beds in Santorini; so, there may be many more visitors staying in non-hotel accommodation than in hotel accommodation.

See *Accommodation* above i.e. total accommodation capacity is estimated at:

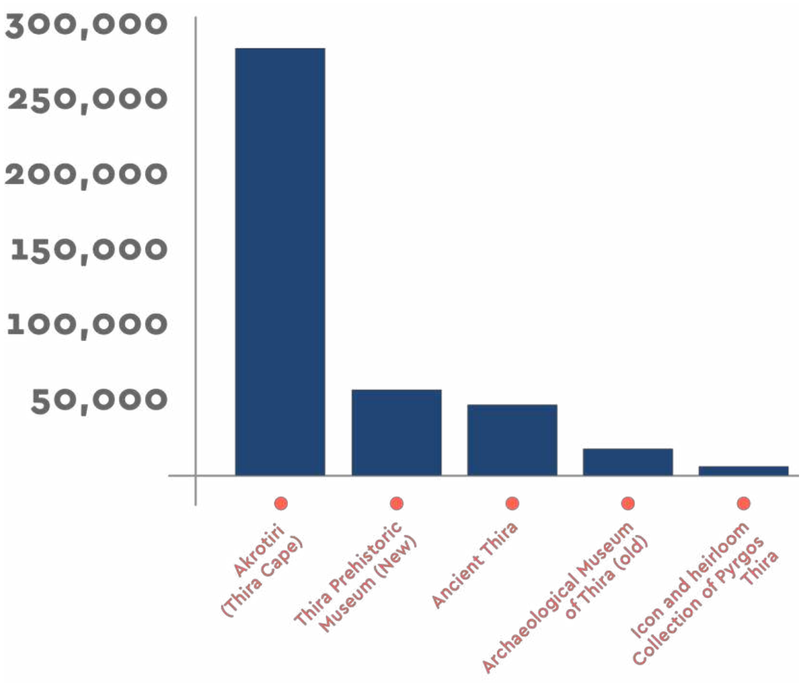
- Hotels: 13,963 beds
- Villas: 3,619 beds;
- Furnished rooms: 22,099 beds;
- Short-term lets: 3,300 listings, 73% of which are entire properties and therefore likely to have several beds per unit.

Archaeological Sites and Museums

Visitor numbers

The Archaeological Site of Akrotiri is by far the most visited attraction in Santorini. All other attractions had fewer than 50,000 admssions in 2018. (Based on data from the Hellenic Statistics Service)

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



TripAdvisor review ratings

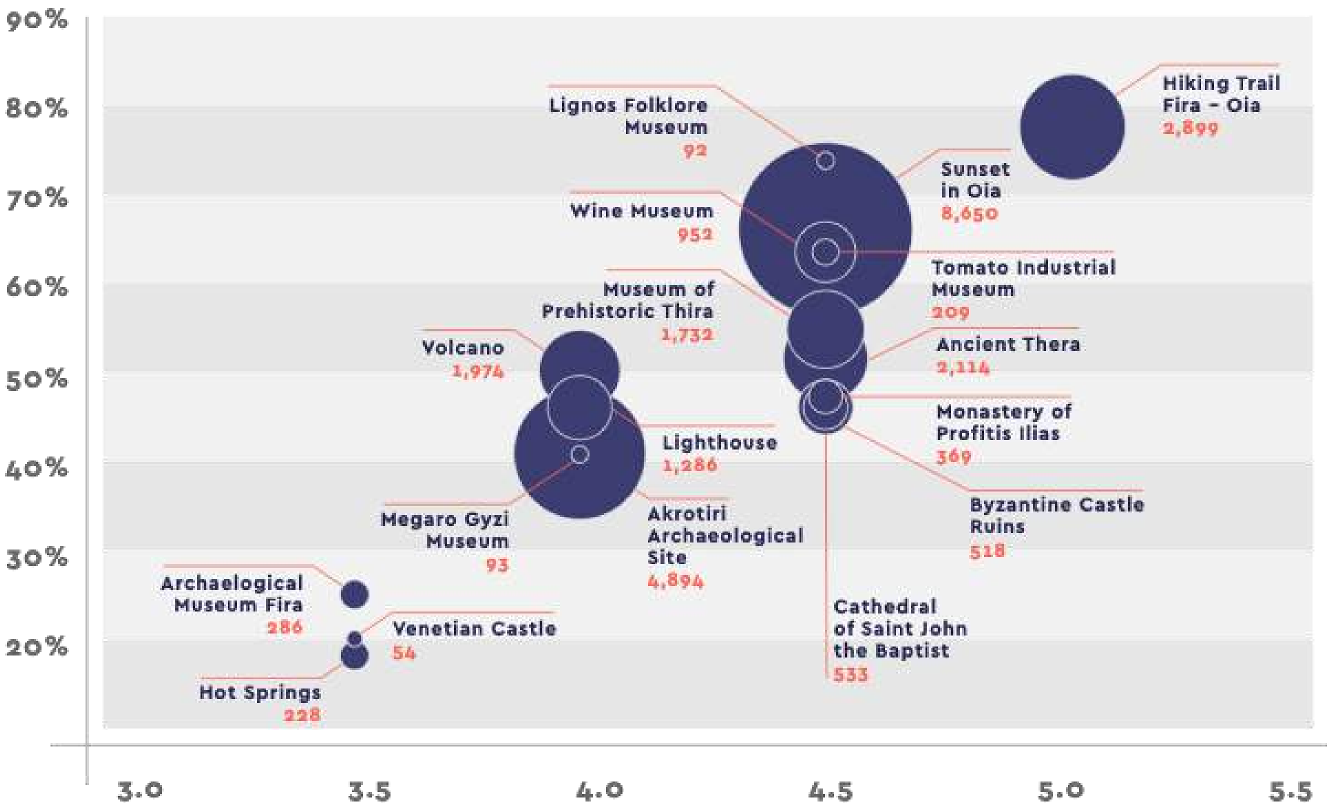
There are six attractions with individual shares of 5* ratings higher than 50%; four of these also have most reviews:

- Sunset in Oia;
- Ancient Thera;
- Prehistoric Museum of Thira;
- Wine Museum;
- Only Lignos Folklore Museum (92 reviews) has a share of 5* ratings higher than 70%;
- The Archaeological Site of Akrotiri – the most visited attraction based on data from admissions – has the lowest share of 5* ratings (42%) among sites with +1,000 reviews.

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

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

4.4.5 Analysis of Trip Advisor Rating & Reviews



4.5. Market Assessment

Current international arrivals by air suggest a clear hierarchy of markets providing the bulk of Santorini's tourism. (See *International Air Arrivals* above). In order of priority, these are:

- Italy (26%);
- UK (25%);
- France (14%);
- Germany (7%);
- Austria (4%);

- Switzerland (4%);
- Netherlands (3%);
- Spain (3%);
- Norway (3%);
- Sweden (2%).

US visitors are also important to several businesses in Santorini. However, as most tend to fly via Athens or arrive on cruise ships, there is no reliable data on their numbers.

Cruise passengers comprise a variety of different nationalities. Although they are not identified by nationality, the majority are estimated to come from Europe and the USA. Most spend c. 5 hours on Santorini. Nor are ferry visitors – from Crete, other islands and Piraeus – identified by nationality.

Online surveys of recent visitors to Santorini revealed qualitative insights into some of Santorini's appeals and visitor behaviour:

- The appeal of Santorini to US travelers as a 'bucket list' destination;
- Over half (53%) of Britons interviewed and 43% of Americans were travelling with their partner and 28% and 29% respectively with their family. The rest were travelling alone;
- Main motivations for visiting Santorini (apart from as a 'bucket list' destination) were:
  - a sense of a sun and sea paradise;
  - natural beauties;
  - history and culture.
- Main things liked about Santorini were:
  - quality of food & drink;
  - quality of tours/activities/excursions;
  - variety of tours/activities/excursions.
- The least satisfying aspects of Santorini were:
  - quality of airport services;
  - quality of port services;

- poor value for money;
- limited tourist information;
- limited parking facilities.

- Britons found the astonishing landscape most attractive, followed by Santorini's cultural/historical appeal. Americans, on the other hand, mentioned culture and history ahead of astonishing landscape as leading the island's appeal;
- Over 80% of Britons and Americans stated an intention to return to Santorini within 5 years; and over 90% would recommend Santorini to others as a holiday destination.

4.6 Key Issues Emerging from Research and Consultation

Local surveys and consultation with businesses, the community, and other stakeholders in Santorini revealed the following issues, attitudes and views:

Economic Issues

- Limited economic diversity/'mono-economy': Santorini's economy is disproportionately dependent on tourism. There is an opportunity to increase economic diversification by developing agriculture further as a complement to tourism (predominantly wine production and selected produce unique to Santorini).

Tourism Impact

- General attitude: 55% of members of local communities believe the positive impacts of tourism do not outweigh the negative impacts.
- Positive impact: Among both local businesses and members of local communities there is a strong consensus on the positive impact of tourism in areas such as: jobs for local people, income for local shops and SMEs, and demand for local food and crafts.
- Negative impact: However, there is also a strong consensus on the negative impact of tourism in areas such as the living environment for local people (quality of life) and the natural environment (e.g. biodiversity, coastal areas, water, pollution).
- Congestion: Overcrowding, particularly in Oia and Fira destroys the visitor experience, inconveniences residents, and adds disproportionately limited revenue for the volume of short-term visitors. Should places such as Oia be considered in the same way as visitor attractions, which have a carrying capacity limit, in order to maintain the quality of the visitor experience (e.g. through an entrance fee and/or vehicle ban)?
- Short-term rentals: 74% of local businesses and 82% of members of local communities believe that the growth of short-term rentals has been negative for local communities in Santorini.

- Affordable housing: There is a perceived lack of affordable housing for essential service providers (e.g. doctors, dentists et al), largely as a result of high-priced demand for short-term vacation rental. This is a problem increasingly shared with other Greek islands.

- Day visitors: In respect of day visitors coming in the peak season, 42% of local businesses think the aim for 2025 should be to reduce the number a lot; and 33% think the aim should be to reduce it a little. Among members of local communities, feelings are slightly stronger, with the respective shares being 44.5% ('reduce a lot') and 31% ('reduce a little').

- Manage visitor flows: 96% of local businesses and 85% of members of local communities think that action is required to improve the experience of visitors and residents on Santorini, by improving visitor flows and reducing overcrowding.

- Animal welfare: International media reports have drawn attention to the need to ensure proper and decent treatment of donkeys used to transport cruise and other sea-borne visitors up to Fira and Oia. This is not just an animal welfare issue; it is also a reputational risk for Santorini if not addressed fully.

Environmental Issues

- Utilities: Water, energy and waste management is at capacity in peak months. This imposes a strain on both residents' and visitors' facilities.

- Environmental management: There is little, if any, recycling culture or conservation behaviour (e.g. recycling used but clean water (e.g. in vineyards), plastic bottles/containers, encouragement of single-use plastic et al); also waste disposal in landfill is unsustainable.

- Pollution: Major issues are:

  - Cruise ships 'anchored' in the caldera running engines all day to maintain their GPS-anchored position and provide on-board services;

  - General waste visible at the base of cliffs between Oia and Imerovigli.

Infrastructure

- Arrival & welcome: The airport is stretched beyond reasonable capacity, crowded, with poor terminal facilities; road and parking areas are severely congested when several flights arrive at once, which tends to be the norm in the main season.

- Cruise visitor management: Cruise pax spend little, but use facilities and add to congestion. Consider options to review/enforce quota (currently 8,000 pax p. day), separate cruise excursion pax (e.g. new funicular) from Fira-only cruise visitors (old port funicular), ferry pax (new port) and leisure craft/day trips (Vlichada marina), plus possible new harbour on east side.

- Ship access: Review options at old port vs. new port, vs possible additional port outside the caldera.

- Port facilities: No shade at Fira old port and no toilets at Athinios new port.

- Tours/excursions: Poor visitor management and information provision for day excursion pax, especially at Athinios new port (e.g. Nea Kamani/Palea Kameni/Thirassia boat tours).

- Roads: Congested, unsafe – especially at Athinios old port when day sail trips, ferries and cruise pax are boarding/disembarking; and at bus turning point at Profitis Elias.

- Traffic: Congestion at key points and safety issues. Need to limit number of rental vehicles on island (cars, quad bikes, motorbikes) and restrict number and size of buses?

- Parking: limited parking at key sites (e.g. at Athinios new port – for ferries; and in Oia, Fira)

Visitor Experience

- Signage: Directional signage to main towns is sporadic/insufficient. (But there are good hiking signs and brown signs for visitor attractions). Intrusive, mismatched commercial signage does not contribute to the overall 'sense of place'.

- 'Sense of place': Limited 'sense of place': segregation between local residents and visitors; high-quality 'tourism ghettoes'; no local produce, other than wine and some vegetables; no locally manufactured craft products or souvenirs; limited interpretation of local culture (e.g. lifestyle, architecture, geology).

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

- Interpretation: Poor interpretation at key sites/attractions.

- Tourism experiences: Wine tourism, luxury tourism, gastronomy tourism, cultural tourism, romantic escapes/honeymoons, activities, retreats and educational/self-improvement classes are the forms of tourism/types of experiences considered to offer the greatest growth potential outside the main season for the island, in terms of value. Only 38% of members of local communities believe that Santorini needs more visitor attractions.

- Guides: Proliferation of non-registered guides undermines quality experience.

- Value for money: Questionable/poor VFM from visitor experience, particularly accommodation cost.

Seasonality

- Extending season/opening period: There is an ambivalence amongst Santorini businesses about extending the season:
  - 50% of local businesses would be interested in extending their period of opening, if there was sufficient business to justify it (18% answered 'no', 31% 'not sure').
  - 140 hotels stayed open during the winter of 2016/17 as part of a programme to increase off season business.

- Airlift: Limited/no direct air services from best prospect markets outside main season (e.g. Europe).

Brand Image and Competitors

- Brand image: Santorini's image and reputation risk being damaged as result of the above issues, which threatens a long-term decline in visitors.

- Competitors: Santorini's closest competitors are considered to be Mykonos, along with the Turkish coast, and, to a lesser extent, the Canary Islands and other islands of the Cyclades.

Political and Legal Issues

- Law enforcement: Laws are either not enforced or differentially enforced (e.g. building of tourism accommodation on designated vineyards; quota of 8,000 cruise pax p. day breached et al).

- Fragmented land ownership:
  - Frustrates development of agriculture, esp. wine production;
  - Frustrates road development/improvement (e.g. local municipality, South Aegean region, Ministry of Defence et al).

- Vineyard destruction: Tourism building encroaching on vineyards, in spite of laws – failure to enforce/alleged corruption. Also, vineyard land taken out of production to enable development after 10-year restricted period frustrates the opportunity for agricultural development/economic diversity.

- Political influence: Only c. 7,000 permanent residents of c. 30,000 island residents have voting rights. But this minority is largely comprised of SME owners (e.g. shopkeepers, taxi drivers, tour operators et al), who would be likely to be most affected by any proposals to reduce numbers or impose access restrictions (e.g. to Oia).

Challenges, Concerns and Priorities

- Challenges: Local businesses consider the most important challenges to be: traffic congestion, uncontrolled sprawl, crowd congestion in specific places / at certain times, waste management issues, insufficient car parking, and lack of cleanliness.

- Concerns: Members of local communities expressed concerns about the increase in housing prices, landscape erosion, and increase in living costs.

- Dissatisfaction with tourism development: 9 in 10 local businesses are not satisfied with the way tourism is developing in Santorini. The respective share of members of local communities who are not satisfied with the way tourism is developing in Santorini is 87%.

- Future priorities: Among both local businesses and members of local communities there is a reasonable consensus on specific priorities in destination management planning – i.e.:
  - improve infrastructure;
  - improve preservation of cultural heritage;
  - improve preservation of natural heritage;
  - improve heritage interpretation;
  - establish restrictions for new tourism accommodation establishments and for short-term rentals;
  - improve the provision of information to tourists;
  - increase/enhance training and lifelong learning programmes at local level;
  - establish a mechanism to measure and monitor tourism.

4.7. Brand Image and Market Appeal

Santorini currently has a strong brand image in many countries – from the USA and Europe to China. It is one of the world's great 'Instagram destinations'. It has been widely featured over several years, both by many tour operators and the Greek National Tourism Organisation, on websites and brochure covers as an iconic image of Greece – hence its disproportionate fame. This has perhaps given Santorini an advantage over other Greek islands in attracting visitors.

Online surveys amongst recent visitors to Santorini, undertaken as part of this DMP development process, revealed how UK and US visitors in particular viewed Santorini. When asked to choose key words to describe Santorini, they chose a slightly different hierarchy of appeals:

UK visitors	US visitors
- Astonishing landscape - Cultural / historical - Educational - Romantic - Affordable - Welcoming / friendly people - Different / unique / undiscovered - Exciting / lots to do	- Cultural / historical - Educational - Astonishing landscape - Exciting / lots to do - Romantic - Affordable - Welcoming / friendly people - Different / unique / undiscovered

It is logical to assume, given Santorini's outstanding physical assets that, in the absence of data on perceptions of Santorini in its other main markets, these elements would, to a large extent, also define Santorini's appeal in those countries.

Interviews with cruise lines also highlighted the importance of Santorini (and Mykonos) as a critical hook in selling cruises to the eastern Mediterranean, as a result of its famed beauty. Santorini's volcanically generated, dramatic scenery and white villages cascading down to the sea with picturesque, blue-domed churches, have secured its status as an iconic 'poster destination' for Greece, and the Aegean islands in particular. However, this has perhaps tended to mask Santorini's other charms, such as culture, history and gastronomic tradition. These 'signature appeals' form the basis for the development of a fuller brand narrative for Santorini later in this DMP.

A more challenging impact of Santorini's photogenic, 'Instagrammable' character has been the volume of short-stay, lower-spending visitors this fame has attracted, which has resulted in overcrowding at peak periods – hence the characterisation below of Santorini as a beautiful island "*born in (volcanic) anger, threatened by love*".

4.8. Tourism Impact Assessment

Significant Impacts – Threats to Santorini's Sustainability

Significant impacts, which arise from tourism activity on Santorini and might threaten the future sustainability of the island's tourism include:

- **Pollution** from cruise ship emissions in the caldera. This arises from ships needing to run their engines while 'moored' via GPS-anchoring and to maintain power while passengers are ashore. There is no shore-based hook-up facility for power;
- **Visitor congestion** in several areas: cable car at Fira; in Fira, Oia and other tourism 'honeypots' around the island; overcrowding and landscape erosion risk during excursions to Nea Kameni and Palea Kameni;

- **Traffic congestion** on road down to/up from Athinios old port, when ferries and cruise passengers arrive;
- **Potential safety issues** regarding buses turning and parking at Profitis Ilias;
- **Sheer numbers of visitors** in Oia at sunset, and in Fira when cruise ships disembark sightseeing passengers;
- **Road congestion and parking problems** in Oia and Fira, as a result of the number of rental vehicles and coaches;
- **Dominance of tourism** and associated land values militate against using land for other economic activities (e.g. agriculture) and impede the opportunity to diversify the economy to be less dependent on tourism;
- Strain on Santorini's **water and energy** supplies and **waste management** system;
- **Distortion of housing market and restricted availability of affordable housing,** as a result of more profitable short-term tourism lets. This threatens the loss of certain services, thereby potentially undermining community cohesion, if housing is unavailable for essential services workers and other residents.

4.9. Policy Context

National Policy

The Regional Framework for Spatial Planning and Sustainable Development in South Aegean (RFSPSDSA)[32] was created in 2003 but has not been updated since then, in contrast to a series of frameworks for other Regions in Greece (e.g. Region of Thessaly).

An evaluation report in 2015[33] identified a series of discrepancies between the Regional Framework and the Special Framework for Spatial Planning and Sustainable Development of Tourism in Greece, created in 2009 (e.g. guidelines for the development of alternative forms of tourism, assessment of types and intensity of accommodation establishments).

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

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

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

Policy of the Region of South Aegean

In 2012, the main study[34] underlying the Region's strategy identified cases of islands (without specific references) where tourism had already exceeded the carrying capacity of the physical environment and available infrastructure.

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

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

1. Diversify the Tourism Product through quality improvement and experience enrichment (€7.8 million):
   - Promotion of the Region's competitive advantages;
   - Development of experiential products;
   - Development of quality programmes/signs at the local level;
   - Development of small-scale installations and initiatives for the development of alternative forms of tourism.
2. Expand the value chain of the tourism sector through upstream and downstream interrelationships (€2.6 million):
   - Development of innovative entrepreneurship in experiential tourism;
   - Development of collaborative action models across the sector's value chain.
3. Use information and communication technologies (ICTs) (€2.05 million):
   - Creation of tools and applications for experience diversification and enrichment;
   - Use of information and communication technologies for enhancing productivity and service quality in experiential tourism.
4. Develop new skills and knowledge (€2.9 million)
   - Development of training programmes and e-learning services.

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

As part of the Region's Smart Specialisation Strategy (2015), the tourism sector also received funds in relation to protection of the natural environment and the use of green technologies (€6 million total budget for agriculture, processing and tourism).

In 2019, there was a further revision of priorities and actions for the development of 'Experiential Tourism'[35], with emphasis on the overall use of ICT in certain areas of the tourism sector (e.g. enhancement of cultural tourism experience, development of websites and apps for tablets and smartphones for service providers, better connectivity with international booking systems).

In 2019, South Aegean is the European Region of Gastronomy[36] and the Regional Authority has set five objectives as a basis for evaluation:

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

Relating to this, the Aegean Cuisine initiative was launched through the coordinated activities of the South Aegean Centre for Business and Technology Development (KETA) in cooperation with the Cyclades and Dodecanese chambers of commerce. It continues to plan and develop activities to benefit member businesses, which provide quality services to people visiting the southern Aegean. Its website includes information about certified local products, partner restaurants (22 in Santorini), partner producers of local products (4 in Santorini), partner visitor attractions (2 in Santorini) and local recipes (7).

In 2014-2015, the Region of South Aegean partnered with SETE Intelligence (INSETE) on South Aegean's Tourism Product Marketing Plan Roadmap 2015-2020 (viz. Chapter 9).

Policy of Santorini Municipality

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

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

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

- Major infrastructure provision and maintenance – e.g. roads, ports;
- Cleanliness, maintenance, and appearance of public areas/public realm;
- Implementation of research and technology programmes for local economic development;
- Management of local markets and sport facilities;
- Organisation of sports and cultural events;
- Promotion of cultural heritage and cultural tourism;
- Provision of public transportation services;
- Management of museums and protection of monuments and archaeological sites within the area of jurisdiction;
- Traffic regulations, pedestrian zones, information, interpretive signage at points of interest, directional/orientation signage et al;
- Waste management;
- Supply of water and other utilities;
- Preparation and implementation of tourism promotion programmes.

Besides these general functions, the municipal authority of Santorini is involved in a series of influential, tourism-related activities and infrastructural development projects, identified under *Current investment plans* above.

4.9. Competitor Analysis

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

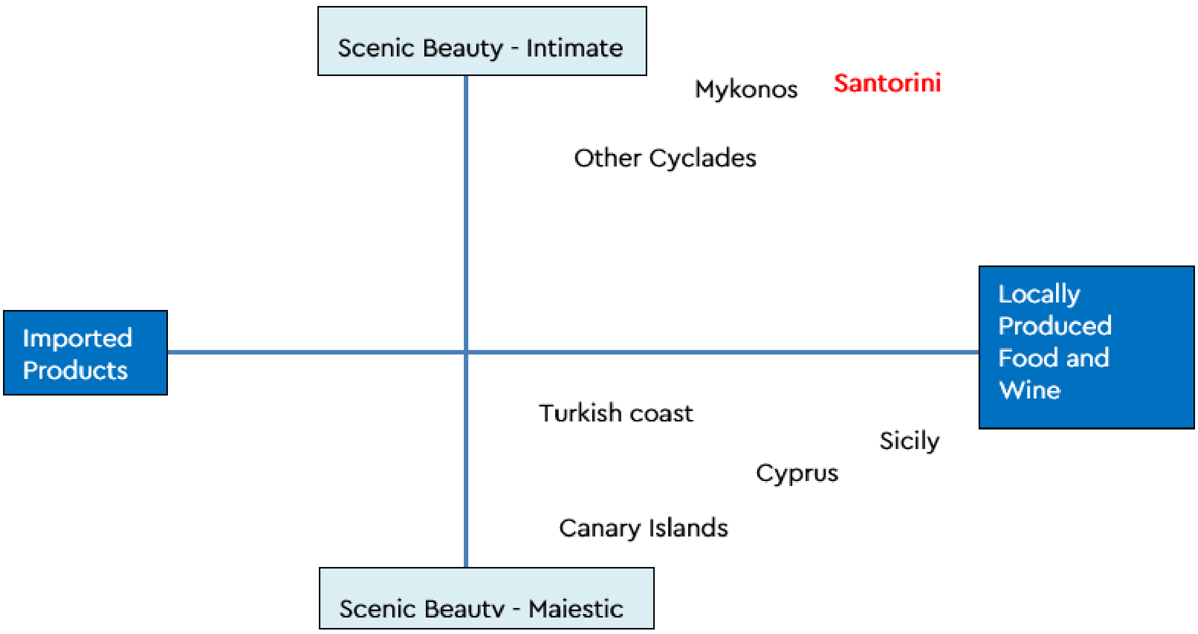
The competitor matrices below are based on insights emerging from the survey of Santorini businesses undertaken in preparation of this DMP and from consultation with key stakeholders. These identify Santorini's competitive advantage, which provides a sound basis upon which to develop visitor products and experiences and to inform marketing messages.

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

- **Physical**: the strongest destination assets (intimate scenic beauty and locally produced food and wine);
- **Emotional**: the emotional appeals (romantic and indulgent).

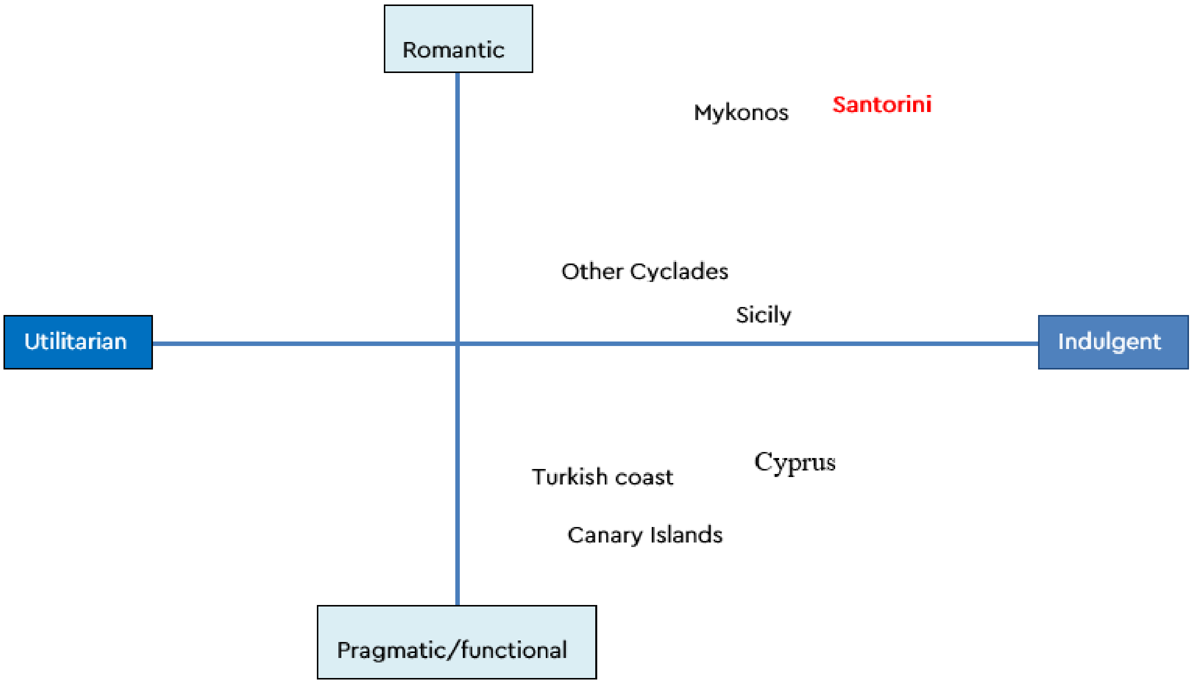
The characteristics at the top and right of each axis represent those in which Santorini excels. These represent the island's strongest visitor appeals. Those on the other end of each axis represent the antithesis of these strengths. This does not mean Santorini does not possess other appeals; it does.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

Santorini – Physical



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

Santorini – Emotional



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

4.10. SWOT Analysis

STRENGTHS	WEAKNESSES

Destination:
• Strong international brand – recognised symbol of Greece.
• Dramatic, volcanic scenery.
• Gastronomy:
  - Unique local produce (e.g. Assyrtiko, fava, white aubergines, small tomatoes)
  - Significant offering of fine dining restaurants (70% of island's restaurants).
  - Links with food tourism through the Region of South Aegean and the European Region of Gastronomy 2019
• Range of cultural/historical attractions (e.g. Akrotiri, Ancient
	Destination:
	• Wildly seasonal pattern (summer peak, but almost empty Nov-March).
	• Airlift: few international flights outside the main season.
	• "Instagram" effect attracts high numbers of short-stay/low-spending visitors.
	• Peak season congestion:
	  - Compromises visitor experience (e.g. cable car queues; overcrowding in certain spots, such as Oia, Fira, Nea Kameni and Palea Kameni);
	  - Potential impact on residents' tolerance of visitors;
	  - Traffic congestion at Athinios Old Port – restricts visitor flows and reduces sightseeing time on island for cruise and ferry passengers.
	• Airport arrival and departure: poor experience,

Thera et al).
- 6 Blue Flag beaches.
- Outdoor activities: hiking, cycling, scuba diving.
- Conducive environment for spiritual (e.g. yoga, retreat), wellness, and self-improvement (e.g. painting, learning) activities and classes.
- High proportion of quality accommodation (52% are 4* & 5*); Fast growth of 5* hotels (134% growth 2012-2018).
- Provision of additional accommodation options through Airbnb-style platforms.
- Directional signage to tourism attractions.

<u>DMP Implementation</u>:
- Variety of stakeholders involved – public and private.
- Awareness amongst local communities of both the benefits and risks associated with a tourism economy.
- Regional support for tourism (Cyclades Chamber).
- National support for tourism (Ministry of Tourism).

basic terminal facilities, inadequate infrastructure, insufficient capacity.
- Lack of toilet facilities in old and new ports.
- Lack of shade for disembarking cruise passengers awaiting cable car or land transport.
- Pollution from cruise ship emissions in caldera.
- Waste management facilities – near breaking point.
- Water supply: stretched to limit in tourism season.
- Energy supply: strained during peak season.
- State of transport infrastructure (i.e. public buses) and road safety (e.g. bus turning at Profitis Ilias).
- Interpretation at key sites.
- Visitor information provision.
- Disproportionate economic dependence on inbound tourism and specific geographic markets.
- Few qualified local guides, particularly with a wide range of language skills, means a reliance on guides from Athens and elsewhere for certain groups.

<u>DMP Implementation</u>:
- Limited access to in-depth data on key issues (e.g. tourism performance, market segments/profiles, visitor satisfaction, tourism impacts).
- Lack of updated principles and guidelines on tourism planning.
- Unbalanced allocation of tourism-related funds in favour of destination marketing rather than destination management.
- Lack of affordable housing
- Key attractions fail to attract a strong share of 5* reviews in Trip Advisor.

OPPORTUNITIES

<u>Destination:</u>
- Position Santorini as a premium quality, aspirational destination with an exclusive image and enhance Santorini's 'sense of place'.
- Extend the season beyond peak months.
- Improve airport arrival and departure experience, infrastructure and terminal facilities.
- Creation and promotion of new experiences and events to high yield niche markets (e.g. festivals, events, classes et al – based on brand strengths, incl. gastronomy and romantic products).
- 'Cultural route of Santorini'.
- Realise the full potential of Ancient Thera + improved interpretation of heritage sites.
- Integrated brand for tourism, wine (unique Assyrtiko) and other products.
- Stronger local supply chains (incl. e.g. more fruit

THREATS

<u>Destination:</u>
- Threat of erosion/damage to the natural environment.
- Short-term rentals distort housing market for local people.
- Dominance of tourism restricts access to affordable accommodation for essential public service workers (e.g. teachers, nurses, doctor et al), thereby threatening community cohesion.
- Dominance of tourism frustrates development of other sectors (e.g. agriculture) by raising land values/preventing other forms of land use.
- Geopolitical instability in the wider

and vegetables, clothing, crafts, jewellery, wine, ceramics). • Thirassia – 'Santorini as it once was'. • Opportunity to become a leader in sustainability amongst Greek destinations (aspirational). • Quality management of public realm and natural environment. • Balanced land use plan, to restrict inappropriate development + increase land in use for vineyards, fruit and vegetable production, etc. • Improved cruise visitor management. • Enhanced public transportation for visitors, which is easy to use, incl. information and timetabling. • Integrated multi-modal transport plan for passengers and freight, with integrated transport hub. • Improved interpretation, especially at major sites. • Improved signage (accurate, helpful, informative, attractive). • Potential for joint packaging and promotion with neighbouring islands to spread traffic? • Guide training and certification – particularly in languages of growth markets. DMP Implementation: • New political regime in summer 2019. • Local, regional and national bodies align to implement the DMP. • Use DMP as a focus to encourage collaboration between major stakeholders in private and public sectors and communities in both tourism planning and implementation.	region (Turkey and Middle East). • Impact of Brexit on the value of the Euro in the UK, Santorini's second largest market. • Forecasts for slower growth in the economies of key target markets. • Reputational damage from: - Negative publicity on phenomena such as congestion, low visitor satisfaction at key attractions, degradation of built/natural environment. - Media coverage of inappropriate behaviour by tourists. - Media coverage of animal welfare issues (donkey transportation). DMP Implementation: • Failure of stakeholders to collaborate on implementing the DMP. • Failure to raise sufficient resources to implement DMP priorities.

4.11. Challenges

Based on extensive stakeholder consultation, research amongst businesses, communities and previous visitors, key challenges facing Santorini in developing its tourism have been identified as follows. These are structured according to the six strategic priorities identified in section 6.4 *Strategic Priorities.*

Making Santorini Sustainable for the Decades to Come

- Develop an approach, which ensures tourism will deliver **sustainable economic and social benefits** and take steps to minimise any **negative impacts**. This DMP provides the basis to do that.

- **Diversify Santorini's economic base**, so that it is less dependent on tourism and allows other sectors, such as agriculture, to grow.

Managing Tourism to Ensure Residents' Quality of Life and Quality of Visitor Experience

- Manage **visitor flows, and potentially numbers,** in the peak season, in order to reduce congestion, improve the visitor experience, minimise environmental impact, and avoid inconveniencing residents going about their daily business.

- Ensure **essential services** are maintained, through the provision of affordable housing to key workers and that visitor demand for accommodation does not prevent this.

Conserving the Quality of Santorini's Built and Natural Environment

- Adopt a sustainable **waste management** policy.

- Minimise the **pollution** resulting from cruise ship emissions in the caldera.

- Find a way to reduce **water consumption** and **conserve energy**, or increase their availability.

Ensuring Santorini Achieves Optimum Value from Tourism

- Improve **access** on arrival to Santorini: by air (airport capacity, facilities and experience); and by sea (cable car, Athinios Old Port, possible new port).

- Secure **collaboration of major stakeholders** at local, regional and national levels, in public and private sectors and the community, in implementing this DMP and in future destination management planning.

Developing New Experiences for The Off-Season, Providing a Model for Attracting Higher Revenue Summer Tourism

- Improve the **seasonal distribution** of visitors beyond the main season, thereby extending job opportunities and economic benefits throughout the island.

- Develop **brand-resonant experiences** targeting more affluent travellers, who have a greater propensity to travel outside the main season (e.g. gastronomic, romantic, cultural experiences and festivals; 'educational escapes'; active, spiritual, sensual retreats).

Enhancing the Brand

- **'Future proof'** Santorini as a tourism destination, by ensuring its lasting appeal to markets that will deliver the most sustainable form of tourism, including the improvement of existing, and development of appropriate new, visitor products and experiences, which reflect Santorini's core brand values.

PART 5

WHERE DOES SANTORINI WANT ITS TOURISM TO BE IN 2030?

AIM AND VISION

5. Where does Santorini Want to be? Vision and Aims

5.1. Strategic Aim and Vision

The proposed **Strategic Aim** for tourism in Santorini is:

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

This means focusing on tourism that:

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

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

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

In support of this vision, the following will be important:

- In the decade to 2030, Santorini will increasingly position itself as an **aspirational, exclusive destination**, focusing its development and marketing on those market segments that will deliver the greatest benefit to Santorini in terms of revenue, seasonal spread and sustainable behaviour. This represents a **coherent and single-minded focus** for the island, requiring local communities and businesses across Santorini to commit to this vision and play an active part in the development of experiences, and in providing a level of customer service, which are in keeping with this aspiration.
- Critical to achieving this aspiration will be the adoption of a range of methods to ensure **sustainability**, including initiatives to manage visitor numbers and flows within

the limits of the carrying capacity of the island as a whole and of the specific places and times when there is a danger of overcrowding and negative impact on both quality of life for residents and the quality of experience for visitors.

- This will require a commitment to **economic diversification**, particularly in encouraging the growth of Santorini-specific agricultural produce and the development of supply chain links between the agricultural and tourism sectors.

5.2. Strategic Focus

Santorini has been characterised above as an island of *"beauty born in anger, threatened by love"*.

This encompasses an inherent opportunity, which is threatened by its own popularity: a destination, like Helen of Troy, whose breathtaking beauty contains the seeds of its own potential destruction, through poor visitor management. 'Born in anger' references Santorini's volcanic origin, which dominates its visitor appeal and residents' daily lives; and 'threatened by love' relates to its popularity, which risks damaging its visitor appeal through too many people in one place at one time and poor visitor management. This leads to the main strategic imperative, which the DMP must address: to save Santorini from itself – i.e. by addressing visitor management, particularly in the main and shoulder seasons.

Based on the evidence gathered, the development of sustainable tourism in Santorini requires the DMP to focus effort as follows:

- Manage main season visitor pressure – c.80%
    - Via techniques to manage visitor flows and reduce congestion at peak times in specific places;
    - Via appropriate new infrastructure developments.
- Seasonal extension – c.20%
    - Via attracting airlines to extend direct services into the off-season;
    - Via development of new products, experiences and events targeting off-season niche market segments, which reflect Santorini's 'sense of place'.

5.3. High-Level Objectives

Supporting the Strategic Aim are 5 high-level objectives to be achieved by 2030:

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

2. To secure a more **balanced economy**, by enabling growth in the development of agriculture.
3. To become recognised as a global leader in **sustainable tourism management**.
4. To establish an image for Santorini as an exclusive **paradise island**.
5. To **extend the tourism season** and ensure that 75% of the tourism capacity is open for at least 9 months of the year.

PART 6

HOW WILL SANTORINI GET THERE?

STRATEGY AND ACTION PLAN

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

6.1. The Approach to Strategy

The essence of a DMP such as this is to manage the destination to the advantage of the tourism industry and the wider local community, so that it is economically, socio-culturally and environmentally beneficial and sustainable for the long term.

The starting point is to obtain an understanding of the types of visitors who will deliver best against this requirement, i.e. visitors who will provide most value, contribute most to the destination's sustainability, and impose least on the destination's natural resources, built heritage, and residents' tolerance. The destination must then:

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

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

6.2. Brand Positioning

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

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

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

Brand Image

Primary brand characteristics:

- Romance;
- Gastronomy;
- Scenic beauty (natural and man-made);
- Volcanic character.

Supporting brand characteristics:

- Cultural heritage;
- Wellness (future - aspirational).

Emotional take-out/core vibe:

- Indulgent and tranquil (aspirational);
- Relaxing and inspiring.

Brand Positioning

Combining the strongest of these brand characteristics, Santorini's brand proposition – the distinguishing benefits it offers to visitors, which underpin its competitive identity – can be described as '**romantic gastronomy**'.

This combines two of Santorini's most outstanding characteristics and strongest visitor appeals: its romantic setting and gastronomy. It is what most defines its character succinctly and competitively as a visitor destination. Inherent in the 'romantic' element is the volcanically created scenic beauty of Santorini, which serves as an ever-present backdrop – from romantic accommodation locations and restaurant settings to the dramatically scenic environment - which infuses the entire visitor experience and creates a dominant, lasting memory of Santorini; while 'gastronomy' is both rooted in centuries of tradition and strongly represented in contemporary produce and cuisine, with a large number of fine dining restaurants, and many others, serving meals using locally distinctive produce.

Other characteristics, such as culture and history, can add definition; but this brand proposition should lead Santorini's competitive positioning and guide its approach to product and experience development and marketing.

The main challenge and consequent approach to marketing Santorini as a sustainable destination can be summarised as:

- **Business Challenge:** "Born in Anger, Threatened by Love" – Santorini's globally iconic, volcanically created, scenery risks attracting too many visitors, particularly in certain areas at certain times.
- **Positioning:** "Scenic and sensual" – volcanic character, indulgent enjoyment – feeds the body and the soul.
- **Brand proposition**: "Romantic, gastronomy" – an island famous since ancient times for its produce, where contemporary gastronomic experiences are wrapped in scenic splendour.

Brand Narrative Themes

A brand narrative is the story, or series of stories, a destination tells about itself, which reflects its distinctive character. They should both flow through Santorini's marketing communications and inform the type of products and experiences it develops to attract visitors.

These themes are based on Santorini's strongest brand characteristics. They incorporate elements of Santorini – products, experiences, concepts and imagery – which support the stories Santorini should tell about itself.

Theme	Stories	Supporting Products, Experiences, Concepts and Imaery
Romantic escape	• Lose yourself in surroundings of fairy-tale beauty • Mythology associated with romance: Jason and the Argonauts, Euphemus, Anaphe (daughter of Poseidon) and Theras	• Oia & Imerovigli • White villages cascading down cliffs towards the sea • Sunsets • Boundless vistas • Clear blue-green sea • 'Semi-private' boat tours in caldera and to nearby islands • Escape to the way Santorini once was - Thirassia • Quality accommodation

Beauty born in anger	• Volcanic history – created today's scenic beauty • Mythology associated with volcano: creation of Santorini-Calliste (Euphemus) • Atlantis myth • Minoan civilisation, destroyed by volcanic eruption	• Caldera – volcano • Volcanic vineyards and fertile soil • Caldera boat tours
Ancient home of gastronomy	• Santorini famous since ancient times as gastronomic hub • Agricultural and culinary innovation • Distinctive local produce, based on fertile volcanic soil	• Vineyards & wine • Ancient and contemporary source of Assyrtiko, considered as one of the best Greek wines • Vegetables (white aubergines, cherry tomatoes, fava beans) • Fertile volcanic soil – opportunities to develop new, locally specific produce?
Indulgent luxury/ sybaritic pleasure	• Feast for the senses: - eyes (scenic beauty), - taste (culinary innovation, local wines), - physical (relaxation in high quality accommodation) - soul (island vibe, endless ocean, scenic beauty, and, aspirationally, tranquillity) • Relaxation, spiritual, sensual experience	• 5-star accommodations • Infinity pools overlooking edge of caldera • Gastronomy • Wine - Assyrtiko • Spas (future-aspirational) • Tranquillity • Marine/caldera trips
Hidden history	• Undiscovered heritage • Atlantis myth • Minoan civilisation, destroyed by volcanic eruption	• Akrotiri • Ancient Thera • Much still not exposed/revealed • Stories associated with ancient sites (e.g. Who lived there? How did they live? Societal structures and trading relationships et al)

6.3. Target Markets

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

- **Value:** Current and future potential value (e.g. volume x spend x repeat visit propensity);

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

The most attractive segments are those that offer greatest value and contribute most in terms of sustainability/least negative impacts. The purpose in prioritising these segments in this way is to identify those for whom visitor experiences, products, and visitor-related infrastructure should be developed, and at whom marketing should be targeted, because these are the segments that will deliver the most sustainable long-term growth for Santorini. Segments have been identified by geography (country of residence) and lifestyle values/travel motivation. The analysis looks at both existing and potential markets, with a view to assessing the role each segment could play in shaping the direction of the DMP – and therefore the visitor experiences, products, and visitor-related infrastructure that should be developed – i.e. value x contribution towards a sustainable visitor economy.

Target geographical markets

- **Primary markets**: While INSETE reports indicate the most valuable visitors to the southern Aegean come from Germany, UK and France, in that order, airport arrivals for Santorini specifically show by far the largest numbers come from Italy, UK, France and Germany, in that order. These markets are not only amongst the largest outbound markets in the world and particularly in Europe, but it is the preponderance of segments in these markets, to whom Santorini's visitor products and experiences most appeal, and their relative proximity and associated repeat potential, which marks them out as continuing to represent Santorini's best prospects over both the short and medium-term future. Further segmentation and targeting, as identified below, will enable Santorini to optimise the contribution from these valuable markets.

- **Secondary markets:** Other countries offering lower, but still significant, potential include: Austria and Switzerland, followed by Netherlands, Spain, Norway and Sweden.

Existing Markets Based on Lifestyle Values/Travel Motivation

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

- 'Cultural visitors', for whom Greece offers interesting sites, but which perform below the southern European average in terms of visitor assistance and 'sense of place';

- 'Foodie visitors', whom Greece "absolutely delights" (Travelsat Competitive Index, March 2019).

Future Market Growth Potential

Segment Priorities

Based on the factors outlined above, including a combination of market size and different destination appeals in the main and off-seasons, key segments, offering the greatest current value and most sustainable short-medium-term growth potential for Santorini, particularly beyond the main season, are:

Primary Potential

- "Romantic escapers/honeymooners" from Italy and UK, followed by France, Germany, Switzerland, Austria, Netherlands and Spain;
- "Foodies" from USA, Italy and UK, followed by France, Germany, Switzerland, Austria and Netherlands.

Secondary Potential

- "Cruise visitors", mainly 'empty-nester' couples from UK and USA, plus groups of friends from USA and other European countries – albeit offering lower value by nature of their day visit nature.

Tertiary Potential (long-term, aspirational)

- "Sybarites" from USA, Italy, UK, France and Russia – subject to future development of luxury spa and gastronomic experiences.

These segments are prioritised in the Marketing Plan (Section 6.6 below), where they are further subdivided between those offering main and off-season potential.

Segment Profiles

- **"Romantic escapers/honeymooners":** Self-evidently predominantly younger couples, seeking a tranquil, romantic, and often indulgent, escape from their frenetic, and frequently metropolitan, working lives. Accommodation quality, gastronomy, and scenic setting are all important factors that contribute to the experience this segment is seeking.
- **"Foodies":** Defined by Travelsat as a significant segment for the southern Mediterranean, "foodies" span a broad age range and travel mostly as couples. Local cuisine is clearly an important element in "foodies"' destination choice; but few will actually be food-specific travellers seeking exclusively gourmet experiences throughout their trip. However, while they may not be pure gastronomy tourists, they are nevertheless more likely to choose a destination with a reputation for quality local cuisine than one with no distinctive cuisine. Distinctive, quality local cuisine is important in that it endows such destinations with a competitive advantage when it comes to "foodies"' destination choice.

- **"Cruise visitors":** Mostly 'empty-nester', older couples, plus some younger couples and groups of younger people, visiting several islands in the southern/eastern Aegean, whose time on any one island tends to be limited to day shore excursions of c. five hours. With regard to competitive advantage, Santorini and Mykonos are iconic destinations, which frequently play an important part in cruisers' selection of an Eastern Mediterranean cruise, as a result of these islands' famed scenic beauty.

- **"Sybarites":** Predominantly younger-middle-aged couples, plus small groups of friends, who seek the best when they travel, for whom luxury, exclusivity and indulgence are important. This is about indulging the senses and experiencing a high level of quality in the activities they undertake, the places they stay, the food they eat and things they buy. High-end wellness spas are, for many, an important part of this aspirational experience. Destinations with an iconic status for offering such luxury experiences will have a competitive advantage in attracting these high-spending visitors.

6.4. Strategic Priorities

The primary focus of this DMP is on six Strategic Priorities, each with a set of action areas. These are defined below. They are derived from the knowledge acquired from research, consultation and analysis set out in previous sections. In particular, they address the opportunities and challenges set out in Sections 4.10 (SWOT) and 4.11 (Challenges), in pursuit of the strategic aim and vision in Section 5.1.

The **Strategic Priorities for Destination Management in Santorini** are

1. **Making Santorini sustainable** for the decades to come
2. **Managing tourism to ensure residents' quality of life and quality of visitor experience** – ensuring that these match the brand
3. **Conserving the quality** of Santorini's built and natural environment
4. **Ensuring Santorini achieves optimum value** from tourism
5. **Developing new experiences for the off-season,** providing a model for attracting higher revenue summer tourism
6. **Enhancing the brand**

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

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

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

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

Strategic Priority	Action Area
1. Making Santorini sustainable for the decades to come	• Independent, scientific assessment of the carrying capacity[37] of Santorini and of Oia and Fira, including the psychological carrying capacity (i.e. point beyond which visitors perceive the destination experience to be compromised) • Action to ensure that tourism volumes relate to carrying capacity • Inter-islands strategic visitor management planning – spreading the benefit and the load • Integrated multi-modal transport plan for passengers and freight, with integrated transport hub • Strict controls on cruise ship pollution • Best practice waste management/recycling, incl. design and delivery of training programmes on practices of waste management [38] • Water and power conservation/ management measures, incl. creating awareness amongst visitors of tourism's impact on water and power and eliciting their cooperation in pursuing sustainable practices. • Strengthening of residential communities to maintain their social and cultural coherence • Sustainable practices by tourism businesses. Promote available handbooks on the subject[39].[40] [41] [42] • Conservation of landscapes/ townscapes to protect heritage and enhance sense of place • Urgent action on infrastructure – seaport, airport, roads, water, power, waste • Carbon-neutral status for Santorini • Enhance the visitor experience in Oia and Fira by managing visitor flows • Spread the visitor benefits by promoting multiple sunset viewing locations
2. Managing tourism to ensure residents' quality of life and quality of visitor	• Point of arrival welcome and information • Improved signage – related to visitor management plan • Improved interpretation, especially at major sites • Removal of traffic from Oia and Fira + park and walk – chargeable parking, varying by time of day, time of year • Enhanced public transportation for visitors, which is easy to use • Ticketed entrance to Oia in the evening during the peak months

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[37] 'Carrying capacity' taking account of quality of life (as per resident perceptions), quality of visitor experience, quality of environment, infrastructure constraints, etc – potentially using UNWTO's 'Managing Tourism Growth' (2019), as a framework.

[38] See training opportunities at https://www.travelwithoutplastic.com

https://portals.iucn.org/library/efiles/documents/2012-013.pdf

[39] TUI Travel PLC, Guidelines for Environmental Sustainability in Hotels, March 2011

[40] TUI Group, Plastic Reduction Guidelines for Hotels, February 2019

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

[42] IUCN, Siting and Design of Hotels and Resorts, 2012

experience – ensuring that these match the brand (see 6 below)	• Promotion of multiple sunset viewing places • Additional walking routes around island/with key sites highlighted • Mobile app(s) to help visitors enjoy Santorini to the maximum, avoiding congestion • Professional tourist guiding standards and regulations: quality assurance for tours and excursions, including guiding • Improved cruise visitor management
3. Conserving the quality of Santorini's built and natural environment	• Balanced land use plan, to restrict inappropriate development + increase land in use for vineyards, fruit and vegetable production, etc. • Protection of Santorini's core physical assets, natural and built • Enhancing Santorini's 'sense of place' • Quality management of public realm
4. Ensuring Santorini achieves optimum value from tourism	• Focus on high yield markets, offering seasonal extension potential, particularly on independent travellers with repeat visit potential • Strengthened engagement of village communities in tourism • Stronger local supply chains – more fruit and vegetables, clothing, crafts, jewellery, wine, ceramics • Realising the full potential of Ancient Thera + improved interpretation of heritage sites • All year season
5. Developing new experiences for the off-season, providing a model for attracting higher revenue summer tourism	• Focus on markets and segments offering the greatest potential to visit outside the main season • Creation and promotion of new experiences and events to high yield niche markets • Pilot off-season incentive travel campaign • Pilot corporate management development marketing campaign • 'Cultural route of Santorini' (tourism project announced early in 2019)
6. Enhancing the brand [N.B. Critical to ensure visitor experience lives up to the romantic, exclusive brand promise.]	• Premium quality, aspirational, with exclusive image, in product/experience development and market positioning • Focus on fulfilling requirements of high yield markets, including incentive travel • Primary distinguishing brand characteristics: romance and gastronomy and volcanic character • Supporting brand characteristics: cultural heritage and wellness (aspirational) • Integrated brand for tourism, wine (unique Assyrtiko) and other products • Explore potential of Thirassia – 'Santorini as it once was' • Leader in sustainability amongst Greek destinations (aspirational) • Marketing and promotion plan • Carbon-neutral status target
Crisis preparedness/ civil protection	• Legal framework for crisis response • Operational framework for emergency response • Crisis management plan • Crisis recovery plan
Enabling/ supporting actions (cross cutting)	• Business support and environment • Industry education and training • Research and intelligence • ICT systems and applications • Performance measurement/management

The diagram below shows the intended impact of the strategic priorities (the inner rings) on each of the four primary beneficiaries of the DMP (the quadrants: environment, communities, visitors and businesses) - see Section 3.1 above '*Destination Management Planning as the Basis for Sustainable Tourism*'.

6.4.1 The Strategic Priorities and Beneficiaries in Santorini

SP1 - Making Santorini sustainable

SP2 - Quality of life and visitor experience

SP3 - Built and natural environment

SP4 - Optimising benefits of tourism

SP5 - Extending the season

SP6 - Enhancing the brand

6.5. Action Plan

A detailed action plan is included at Annex 1.

This sets out a suite of actions to deliver against each strategic priority, which are aimed at achieving the high-level objectives identified above (section 5.2). The action plan proposes 176 specific actions, identifies possible lead organisations to implement them, and defines methods for measuring performance against each action.

The action plan covers activities over several years. It will be the responsibility of the local implementation body, when agreed, to decide which activities to pursue and when, in light of available human and financial resources.

6.6. Marketing Plan

The marketing plan sets out a method of attracting the sort of tourism that will underpin a sustainable tourism economy in Santorini, as defined at the beginning of this DMP. A detailed marketing plan is included at Annex2.

Current Situation

Santorini is disproportionately dependent on summer season day visitors. The vast majority arrive between June-Sept, with a July-August peak. There are few visitors in the shoulder season (April and October) and an almost complete dearth of visitors between Nov-March.

Just under two thirds (c. 60%) of international visitors in the main season appear to arrive by cruise[43] (749,000); while c. 40% arrive by air (507,000)[44]. Cruise passengers are almost exclusively day visitors, spending around 5 hours in Santorini; whereas international travellers arriving by air are mostly staying for several nights or more. Repeat visitation to Santorini appears to be surprisingly low[45], in comparison to other destinations. This may reflect the predominance of cruise visitors, whose repeat propensity is likely to be lower than others. Nevertheless, some may return for a longer holiday on Santorini, having experienced it as a cruise passenger.

[43] Excludes ferry/non-cruise arrivals: 281,000.

[44] Excludes domestic arrivals: 563,000.

[45] Greek Travel Pages (2019) Aqua Vista Hotels: 2019 is a Demanding Year for Santorini's Tourism (September 5).

Marketing Strategy

This marketing strategy is focused on achieving the marketing objectives and removing the barriers to sustainable growth outlined below. It sits within the overall DMP strategy of managing main season visitor flows and attracting more business outside the main season. These objectives call for a phased marketing strategy, split between developmental and promotional phases. Marketing effort should be invested where it can make most impact, in the short-medium-term. Development efforts should focus on creating circumstances that will eventually warrant further marketing (e.g. attracting new/extended direct off-season air routes, developing off-season products and packages).

In pursuit of the marketing objectives outlined above, four strategic marketing approaches have been identified and prioritised over the next 5 years as follows:

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

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

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

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

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

Existing segments, which are significant but offer lower growth potential, should be nurtured, but marketing investment should be minimal, other than via the travel trade and general consumer information (e.g. website). Effort should be focused on managing visitor flows and minimising their impact (e.g. cruise), as well as maximising their spend in Santorini, rather than on increasing their number through marketing.

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

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

Marketing Objectives

In light of the currently limited visitor season and disproportionate number of day visitors, the main opportunities for revenue growth and sustainable tourism development lie in attracting higher-spending, longer-staying visitors, particularly in the shoulder- off-season periods and in managing main season visitor flows.

Consequently, the marketing plan focuses on three main objectives:

- To increase revenue from **higher-spending, longer-staying** visitors;
- To extend the season into the **shoulder and off-season** months*;
- To maximise revenue and minimise the impact of **cruise visitors.**

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

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

There is ambivalence amongst Santorini businesses about extending the season. While only half 50% of local businesses surveyed stated an interest in extending their period of opening, if there was sufficient business to justify it, nevertheless, 140 hotels stayed open during the winter of 2016/17 as part of a programme to increase off-season business. Direct off-season air services, or convenient connections via Athens, will need to be in place, and a critical mass of businesses willing to stay open into the shoulder, and possibly off-season, months will be necessary before undertaking any marketing aimed at extending the season; otherwise it will be wasted.

Target Markets and Segments

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

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

- Cost-effectiveness: A limited range of the most cost-effective activities is proposed, acknowledging the need to achieve maximum impact with the limited resources available.

- Targeted marketing: Marketing should not be spread too thinly and should focus on a limited range of the best prospects for Santorini, targeting those who will deliver most benefits with least negative impact, particularly those more likely to stay longer, spend more, return, and visit outside the main season.
- Product-market fit: Marketing investment should also focus on those who would most appreciate Santorini's range of appeals and therefore be likely to stay longer and spend more, rather than on short stay, "Instagram" visitors.

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

Segments are described according to their primary motivation for travel or their reason for choosing Santorini (e.g. "Romantic Escapers/ Honeymooners", "Foodies"). This does not mean they will focus exclusively on these activities – e.g. "Romantic Escapers" may also be interested in hiking; and the appeal for "Foodies" may lie not just in the cuisine, but also in its romantic, scenic setting. Like most people, they are not one-dimensional. But the value of defining segments in this way helps determine the marketing messages to which they are most likely to respond favourably.

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

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

Primary Segments:

- "Romantic Escapers/ Honeymooners" from Italy, UK and Germany;
- "Foodies" from Italy, UK, USA.

Secondary Segments:

- "Romantic Escapers/ Honeymooners" from France, Switzerland, Austria, Netherlands, Spain;
- "Foodies" from France, Germany, Switzerland, Austria, Netherlands.

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

Primary Segments:

- "Romantic Escapers/ Honeymooners" from Italy and UK;
- "Foodies" from UK and Germany.

Secondary Segments:

- "Romantic Escapers/ Honeymooners" from France, Germany, Switzerland, Austria, Netherlands, Spain;
- "Foodies" from France, Switzerland, Austria, Netherlands;
- "Special interest/self-improvers" (e.g. art, yoga, educational classes/retreats) from UK and Germany;
- "Outdoor enthusiasts" (e.g. hikers, cyclists, scuba-divers) from Italy, UK, France, Germany.

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

Segment:

- "Cruise visitors" - mainly 'empty-nester' couples from UK and USA, plus younger groups of friends from USA and other European countries.

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

Segment:

- "Sybarites" – luxury-seekers, from USA, Italy, UK, France and Russia, subject to future development of luxury spa and gastronomic experiences. These might form a new market for Santorini if a sufficient number of appropriate products can be developed over the medium-long-term.

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

Marketing Tactics

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

- **Website** covering key elements of Santorini (e.g. activities, experiences, attractions, excursions; accommodation; transport/access; produce etc.), with links to businesses for booking. The 'what-to-see/do' section should be themed in line with Santorini brand narratives and reflect Santorini's brand values. This could be a development of the current Santorini 'Travelers' Portal' pages on the Cyclades Chamber of Commerce site https://www.e-kyklades.gr/travel/?lang=en , or a separate site linked to it.

- **Inclusion in Greek National Tourism Office (GNTO)** campaigns, website and brochures, especially through the provision of stories, information and imagery, which reflect Santorini's brand values and narratives, to ensure optimum and appropriate coverage of Santorini in GNTO marketing material and communications.

- **Social media** campaigns, themed according to Santorini brand narratives for relevant market segments;

- **Public relations** (PR): Work with GNTO head office, European offices and their PR agencies to:
  - Ensure appropriately nuanced messages, including **press releases/blogs/vlogs,** about Santorini are distributed to targeted consumer and travel trade media in key markets;
  - Encourage **press/blogger/influencer visits** to Santorini, which inbound tourism operators on Santorini should be willing to host as a contribution to the island's marketing effort.

- **Travel trade**: Work with GNTO head office, European offices and their PR agencies to:
  - Organise overseas travel trade (tour operators and travel agents) **familiarisation trips** to Santorini, which inbound tourism operators should be willing to host as a contribution to the island's marketing effort;
  - **Travel trade PR**: see PR above.
  - Work with airlines, overseas tour operators and inbound tourism operators on Santorini to develop and promote **shoulder- off-season packages** in key markets.
  - Consider participating, with local commercial operators, on the Greece stand at key **international trade exhibitions** (World Travel Market, London; ITB Berlin; and specialist fairs – e.g. luxury travel, food, adventure), to increase the number of international tour operators including Santorini in their programmes and to influence their content, particularly with regard to off-season products.

- **Local businesses' contribution**: The willingness of tourism operators on Santorini to host familiarisation visits by international tour operators, travel agents, bloggers, influencers and other key media will be important in providing a valuable contribution to the island's marketing effort.

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

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

i.e. Care should be taken not to encourage additional visits when Santorini operates at full capacity and is threatened by congestion (e.g. peak season); messaging should be more nuanced in terms of promoting experiences and times of year when there is spare capacity and accessibility from key markets.

Marketing Plan

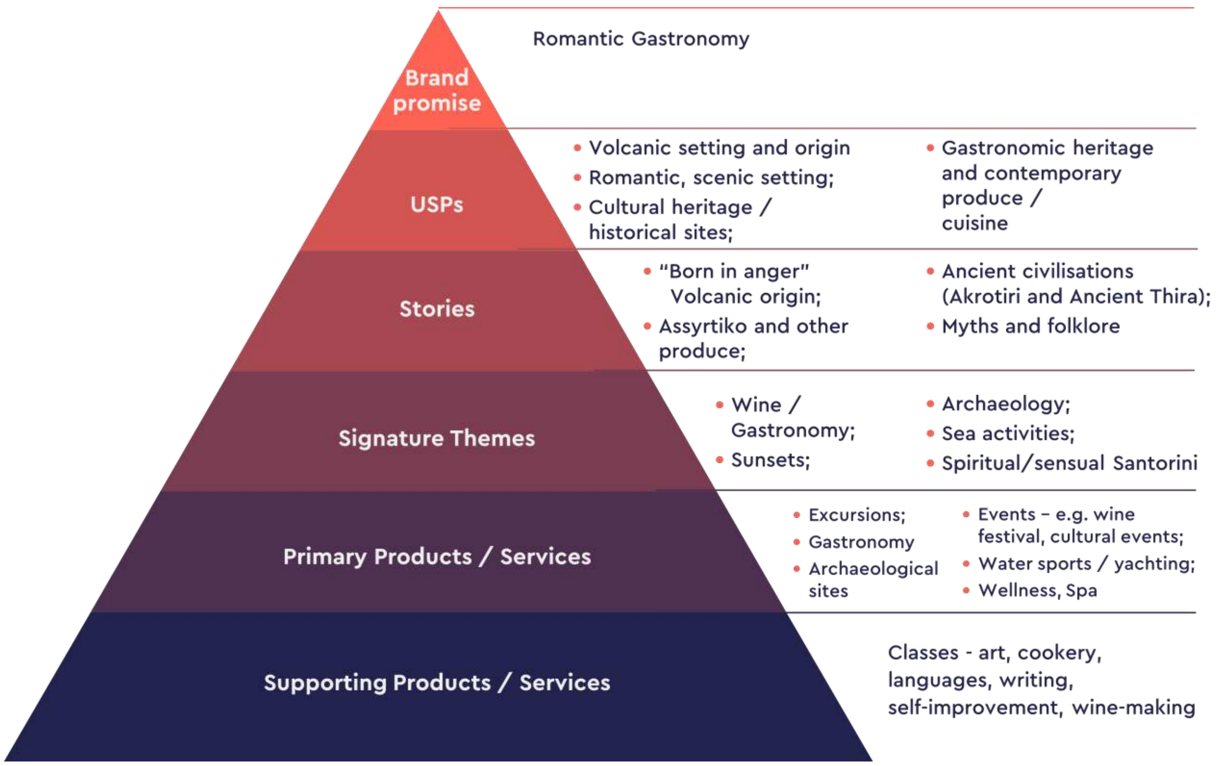
A marketing plan is attached at Annex 2. This summarises target market segments, by country, which offer the best prospects to help Santorini achieve its marketing objectives. It also identifies the main products that will appeal to these markets and the marketing communications tactics that should be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

6.7. Visitor Experience and Product Development

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

The Santorini 'visitor experience pyramid' below illustrates how these themed experiences can be constructed, incorporating stories and building on local events and products to make these experiences both unique to Santorini and appealing to visitors. Starting at the top, with the brand promise, going down the pyramid, each layer supports and elaborates on the one above. At the centre are Santorini's 'signature experiences', in the form of a series of themes, which represent the heart of the proposition.

6.7.1 Visitor Experience Pyramid - Santorini



As noted previously, the origin of Santorini's character lies in its dramatic origin – "born in (volcanic) anger" - the breathtakingly scenic caldera provides an ever-present, dramatic setting for a luxury holiday experience. The value proposition for Santorini is 'romantic gastronomy' – the combination of gastronomic experiences in an outstandingly dramatic, volcanic landscape that cloaks the entire experience in a spectacularly romantic aura. Themes across the island are based on its wine and gastronomy, cultural and archaeological history, dramatic natural, volcanic beauty, and sensual, spiritual experiences evoked by the island's scenic drama. Building on this, a series of 'Signature Themes' are proposed to highlight key existing and potential authentic experiences of outstanding quality around the island. Five primary themes are identified for Santorini, to fulfil the experience needs of the priority market segments defined above, with a view to extending the season and increasing revenue. Identifying experiences all around the island will help to spread visitor time and spend into these areas, creating positive economic impacts for local communities and reduce pressure on parts of Santorini that are currently over-visited.

These themes are:

A. The Best of Santorini Wine and Gastronomy

Santorini's leading wine producers currently offer wine-tasting, tours, and in some cases restaurants on site for sampling the island's gastronomy. To support and expand this, routes and themes should be developed and promoted for a broader range of wine tours, including cooking experiences, scenic town and village visits, sunsets, and even grape-picking, olive-harvesting and wine production experiences. Collaborative experiences should be developed between farms, vineyards and select restaurants (highlighting those certified by Aegean Cuisine), to develop signature wine and gastronomy experiences. These routes and experiences will appeal to 'romantic escapers' and 'foodies' alike.

B. Santorini at Sunset

Santorini at Sunset will introduce visitors to the island's other superb sunset sites, beyond the well-known Oia. Creating a 'must-see' list of sunset locations around the island will distribute visitors around the island, offering a selection of different locations, through special events at each location beginning an hour before, and extending beyond, sunset. This should include gourmet food pop-ups and drink stands, traditional music, and other entertainment, highlighting unique history and stories at each location. For 'romantic escapers' – and those interested in culture and food – special events at each sunset location will provide a uniquely Greek, specifically Santorini-flavoured, and, ideally, relatively intimate 'sundowner experience'.

C. Archaeological Wonders of Santorini

Santorini's archaeological wonders appeal to history and archaeology enthusiasts – culture seeking independent explorers – as well as those with a more general interest in the local and cultural heritage of the destinations they visit. Extended visits with professional guides to Akrotiri and Ancient Thera, new hiking routes and improved interpretation on existing routes (e.g. Fira to Oia, Akrotiri to Ancient Thera et al) as well as special events at key sites, will draw visitors in to experience these sites in-depth, and spread their visit around the island. Recommendations and actions for creation or enhancement of specific experiences relating to this theme are included in Annex 3 Visitor Experience and Product Development Framework.

D. Santorini from the Sea

Santorini from the Sea showcases the wide variety of water-based activities on offer from the island, covering watersports such as fishing, snorkelling and scuba-diving to more relaxing sailing excursions for couples, groups of friends and families seeking to explore the sea. Day cruises are also available aboard sailboats and small yachts, to visit the volcano and Thirassia, and allow visitors to enjoy the sunset over Oia from the sea.]

E. Spiritual-Sensual Santorini

Santorini's natural beauty provides the perfect backdrop for those seeking peace, relaxation and rejuvenation. While Santorini has a small number of exceptional spa properties, the extent of current wellness offerings is quite limited. Global market trends suggest there is a significant opportunity to develop Santorini's luxury spa and wellness product, and a wide range of retreats – yoga, Pilates, meditation, and more. Boutique hotels, in partnership with leading chefs and nutritionists, can develop healthy eating, weight loss, detox programmes and personal training experiences for visitors.

Recommended actions to create or enhance specific experiences in relation to each of these themes are included in Annex 3.

6.8. Investment Opportunities

Possible investment opportunities, aimed at enhancing the Santorini tourism offer and improving visitor flows include:

- New Marina: In February 2019, an inter-ministerial committee for strategic investments gave the go-ahead for the development of a new marina and recreational boat shelter at the area of Monolithos. The marina, which has a budget of €40m, will have 350 berths up to an unspecified superyacht size and will be run by the Municipal Port Fund of Thira.

- Improved port facilities: The provision of shade and toilets at both Athinios old port and Fira new port is required, as are constant monitoring and improvement of a berth management system to regulate cruise ship numbers and manage passenger flows.

- Cable car: Pressure from arriving cruise passengers imposes a demand on the Fira cable car with which it cannot cope. Options should be considered for attracting investment in a new cable car – either at Fira or another appropriate site.

- Airport: Need for increased arrival/departure capacity, coach and car parking (ideally off-airport), traffic management and terminal facilities. Plans for development are the responsibility of FRAPORT.

- New port: Options have been initially explored for the potential of building a new port on the east coast. Subject to conclusions emerging from this exercise, this could offer significant potential for both addressing existing problems and attracting new investment.

- Transport hub: The opportunity should be assessed to develop a vehicular hub, as a central point for renting self-drive vehicles (cars, quad bikes, motorcycles et al).

- Wellness spas: An opportunity exists, in keeping with Santorini's exclusive destination aspiration, to develop full service, luxury wellness spas on the island.

6.9. Performance Monitoring and Management

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

In addition to ongoing monitoring of activities, an annual review of progress against objectives should be undertaken and the DMP revised according to lessons learnt, changed circumstances, or revised objectives.

Perhaps most important of all is to have **simple measures of overall success** in terms of **sustainability**, relating to the four potential beneficiaries of tourism in general and of successful implementation of the DMP in particular:

- **Community**: perceptions of the net value of tourism to the community, through an annual survey open to residents of Santorini; using a scale of -5 to + 5. This could be done for perceptions of tourism overall; or of specific aspects of tourism. Importantly, it should cover both the perceived value of tourism and attitudes towards visitors, measuring residents' tolerance levels as well as economic benefits.

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

- **Visitors**: satisfaction of visitors (especially priority target markets) with their experience of the destination using a 10-point satisfaction scale; and likelihood of recommending the destination to others and to return, also on 10-point scale.

- **Environment**: a simple measure of environmental quality must be identified – one that can act as a proxy for other, more scientifically complex measures. Measuring environmental quality must include an ongoing assessment of the state of the natural environment (i.e. landscape and marine environment), the cultural environment (i.e. built heritage and public realm), and resource/utility/pollution management procedures (e.g. energy and water usage, waste management, cruise ship emissions and environmental control systems), so that any negative impacts can be identified and the efficacy of conservation/mitigation measures determined and improved where necessary.

PART 7

GOVERNANCE OPTIONS FOR DMP IMPLEMENTATION

7. Governance Options for DMP Implementation

Successful implementation of this DMP requires the establishment of a local implementation body, whether formally legally constituted or informally assembled, to implement the DMP. This body should also be responsible for raising the funding required to implement its agreed programme and for employing any staff required to carry it out. The exact form of governance needs to be decided by local and regional leaders. However, a separation would be advisable between the roles of the local implementation body, which is charged with implementing the DMP, and a supervisory 'board level' role for those responsible for deciding on priorities, monitoring progress, and revising the plan on an ongoing basis as circumstances change.

7.1. The Value of Destination Stewardship

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

7.2. The Governance and Funding of Destination Management

Implementing the DMP must be underpinned by a governance structure that encourages a variety of synergies. The differential level of involvement by public and private sectors will determine the shape of the governance structure.

An initiative mainly driven by the private sector[46] would require a rather high level of consensus among businesses of different sizes and in different sectors along with a minimum, yet regular, capital contribution by all partners. The failure of such widespread commitment by businesses would result in a 'free-rider' effect, whereby non-contributing businesses would benefit at the expense of those prepared to invest in DMP implementation – an unsustainable situation, which would be unlikely to last long. Besides financial constraints such an initiative would also face challenges in developing suitable destination management solutions in the absence of the public sector's active involvement.

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

Those business models where the public sector plays a leading or facilitative role (e.g. government organisations, non-profit organisations) are regularly supported from government funding (e.g. room tax). However, place-specific conditions shape the longevity[47] and utilisation of such financial resources. In Greece, the revenues derived by municipal authorities from the bed tax[48] (0.5%) and the revenues of the room-stayover tax[49] (€0.5-4) collected by the Independent Authority for Public Revenue are not hypothecated- i.e. the deployment these revenues is not tied to tourism-related projects at respective destinations. Also, this revenue would neither support the full range of destination management projects nor would it be used exclusively to the benefit of the accommodation sector, which mainly bears the tax burden.

7.3. Three Scenarios for Synergistic DMP Governance in Santorini

For the next five years, sponsorship and partnership programmes are expected to be the fastest growing revenue source worldwide in DMOs' annual budgets[50]. Searching for sources of revenue that can enhance flexibility and speed, this chapter explores three scenarios under which local stakeholders can work together and make progress on delivering the strategic priorities of the DMP. Each scenario takes account of Greek experience regarding regulatory frameworks, policy-making at the local level, and ongoing projects of a similar kind. The centralised nature of policy-making in Greece would entail a necessary level of endorsement and active support from the Ministry of Tourism and other Ministries, as required in each case. Each scenario is also based on different assumptions, involves various opportunities and constraints, and outlines a unique framework that could:

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

[47] Law 339/1976 as amended by Law 1080/1980, Law 2130/1993 and Law 3756/2009.

[48] Law 339/1976 as amended by Law 1080/1980, Law 2130/1993 and Law 3756/2009.

[49] Law 4389/2016 as amended by Law 4514/2018.

[50] Destinations International (2019) Destination Next Futures Study 2019.

Scenario 1: Creation of an Entity by One or More, Public and/or Private Sector Stakeholders.

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

- At the national level, it would be necessary to amend the framework for public and private partnerships[51]. Since 2005, this framework has set the scene for numerous projects with regard to the construction of public infrastructure and the provision of quality services to citizens. However, it has had limited application in the tourism sector and has not been associated with collaborative schemes that would implement the actions of a mid to long-term, strategic plan.

- At the local level, it would be necessary to amend the legislation of development companies[52]. The scope of destination management plans should be added to exceptions of special purpose for the creation of more than one development company under municipal authorities[53]. Such an amendment would enable the establishment of a dedicated development company under the Municipality of Santorini. The new entity would be responsible for implementing the DMP in cooperation with other actors (e.g. the Region of South Aegean, tourism industry associations, other business groups, educational institutions).

- At the local level, another option would include an amendment of[54] legislative terms and provisions with regard to 'Networks of Municipalities and Regions'. The importance of destination management for Greece's top destinations could be the basis for extending the scope of these networks, which are broadly related to promoting inter-regional cooperation within the EU. As a civil non-profit company, a potential 'Network of the Municipalities of Santorini' would undertake the implementation of both DMPs in cooperation with the Region of South Aegean and local stakeholders from both islands.

Scenario 1 Assessment

PROS	CONS
• Public sector stakeholders to assume a leading role in short-term partnership-building within a legal framework with specific obligations (e.g. roles, liability, ownership of partnership property). • Public sector stakeholders to shape an inclusive agenda of destination	• Public sector funding may dominate initial stages of the partnership. • Public sector stakeholders to define call to action for the private sector's involvement in decision-making, funding, etc. • Requires a high level of consensus among private sector stakeholders (industry

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

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

[53] Law 4555/2018 (Article 183, Paragraph 1, Item b).

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

management planning. • Diversity of funding sources (programmatic agreements[55], EU grants, partnerships, sponsorships, charities with regard to the provision of goods, services and projects[56], etc.). • Specialisation of legislation for public-private partnerships and common initiatives with regard to the implementation of destination management plans. • Staff recruitment under the umbrella of an advanced, organisational scheme beyond the common framework of public sector organisations. • Communication benefits for the public sector through the private sector's respective skills and activities.	associations) – renegotiation may be problematic. • Individual businesses may get involved once collaboration becomes more mature. • Time-consuming legislative work. • Time-consuming processes for organisational set-up. • Time-consuming processes for project implementation (e.g. the legality of programmatic agreements is subject to the scrutiny of the Court of Audit). • Lack of domestic experience on comprehensive destination management partnerships, especially under the frameworks of the first and third option as above.

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

Although there is already a suitable company fully owned by the Municipality of Santorini with a portfolio of tourism-related activities, it is facing a fundamental challenge affecting its ability to assume the role of the DMO. Geothira Sole Shareholder S.A has the mandate to administer the geological park surrounding Santorini's volcano and a series of other sites (e.g. thermal springs, a small number of beaches). However, it faces limited access to funding because this type of municipal company is not allowed to sign programmatic agreements[57].

Key stakeholders in Santorini face additional challenges in delivering a range of tourism development, management and marketing projects due to:

- The lack of a municipal committee that would be responsible for advising the municipal council of Santorini on issues of tourism development and promotion[58];

- The termination of the activity of the non-profit Cyclades Progress & Development Organisation, under the Cyclades Chamber of Commerce, in 2019.

In considering these challenges at the local level, a possible solution at the regional level would involve a leading role for the Region of Aegean mainly through its Development Agency – "ENERGIAKI S.A."; a development company whose aims are:

[55] Law 3852/2010 as amended by Law 4555/2018.

[56] Law 4557/2018 (Article 55).

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

[58] Law 3852/2010 (Article 70).

- The scientific and technical support of local authorities and their associations and also the support of decentralised state administration;
- The promotion of entrepreneurial, economic and sustainable development of the local authorities as well as of the wider area;
- The development of environmental protection activities;
- The participation in programmes and the implementation of relevant policies at inter-municipal level or in a wider geographic area.

Putting the implementation of the DMP under the umbrella of the Region's Directorate of Tourism, the development company would act as a vehicle for mobilising domestic and EU funds towards Santorini. The Region would then work closely (e.g. through programmatic agreements) with the Municipality of Santorini and local stakeholders on selected actions. Staff additions would be necessary at both the regional and municipal level for facilitating and monitoring such an approach. This appears to be the best option under Scenario 2 and forms the basis for assessment in the table below.

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

PROS	CONS
• A leading authority to assume the role of the DMP implementation body and enable short-term partnership-building within a legal framework with specific terms and conditions (e.g. allocation of projects and funds included in programmatic agreements, processes for stakeholder consultation). • Public sector stakeholders to shape an inclusive agenda of destination management planning. • Requires a moderate level of consensus among private sector stakeholders due to the strong role of public sector organisations. • Diversity of funding resources (programmatic agreements[59], EU grants, sponsorships, charities with regard to the provision of goods, services and projects[60], etc.). • Time-efficient processes for organisational restructuring.	• Decisions by parent authorities over statutory amendments would be necessary before changes could be taken any further. • Public sector funding will dominate initial stages of DMP implementation. • Dominance of public sector organisation/s may exclude private sector businesses from decision-making and thereby disadvantage them. • Individual businesses may get involved once collaboration becomes more mature. • Time-consuming processes for project implementation (e.g. the legality of programmatic agreements is subject to the scrutiny of the Court of Audit). • Staff recruitment strictly under the umbrella of a public sector organisation. • Communication of DMP outputs and outcomes to be dependent mainly on the public sector's skills and activities.

[59] Law 3852/2010 as amended by Law 4555/2018.

[60] Law 4557/2018 (Article 55).

Scenario 3: Lighter and More Flexible Governance Structure than the Other Scenarios

This structure relies on the voluntary engagement of partners from the public and the private sector, with mutual agreement on a strategic agenda and individual commitment to a group effort, whereby each partner's expertise is deployed most appropriately and efficiently.

Such a structure is already being tested in Greece's capital city. In 2018, the City of Athens, Aegean Airlines, Athens International Airport and the Greek Tourism Confederation (SETE) joined forces to form a unique public-private partnership called *This is Athens & Partners*. The partnership aims to bolster the city's visitor economy and establish Athens as an attractive destination for visitors, residents, professionals and investors. The partnership has evolved from its initial formation in 2016 and is now committed to delivering a comprehensive 3-year €15M plan. The range of tourism-related development, management and marketing projects varies from urban regeneration schemes across Athens and the opening of closed shops in the centre of the city to the curation of events and gigs that will promote Athens as a contemporary cultural hub and a 2–year anti-tagging programme (e.g. removing graffiti tags and illegal posters from the historic centre) to curate the image of the city.

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

- A 'Memorandum of Understanding and Cooperation' to define the scope and terms of the partnership and the key activities that each founding partner will undertake;
- An Executive Board, which would ensure the DMP's implementation through its decision-making capacity and the supervision of all activities undertaken under the partnership umbrella;
- A Steering Committee, which would coordinate day-to-day activities and the sound management of financial and human resources, in order to deliver the Executive Board's decisions;
- A team of dedicated experts including both new recruits (to be employed by one of the founding partners) and existing staff members from one or more founding partners to support the DMP's implementation;
- A second level of partnership members, to enable the private sector's active involvement in the scheme based on the same principles of a high level of consensus, corporate ethics, and trust;

- Fixed amounts of annual contributions by both founding partners and partnership members for an agreed period of time;

- Clearly articulated, specific obligations and benefits for both founding partners and partnership members;

- Framework of funding sources and fundraising options/processes.

Scenario 3 Assessment

PROS	CONS
• A high level of private sector engagement, alongside key public sector organisations. • Commitment to a joint strategic vision and objectives as part of a memorandum of understanding (culture of cooperation). • A dedicated agenda with clear roles and responsibilities. • A balanced distribution of funds between the public and the private sector from the beginning. • Diversity of funding sources and fundraising opportunities. • Staff recruitment under the umbrella of an ambitious partnership brand with influential partners. • Communication benefits for the public sector through the private sector's respective skills and activities.	• Lack of legal entity status and implications (e.g. contracts can be signed only by individual partners). • Negotiation capacity depends on individual members. • Increased funding by the private sector may lead to lack of government control over policy priorities. • Need for a high level of consensus and trust among key stakeholders and/or individual businesses – renegotiation can also be problematic. • High level of risk associated with changes in the strategy of individual partners. • Dependent on partners having the capacity to carry out their share of activities. • Higher dependence (than other schemes) on inter-personal relations and the vision of personalities who first established the partnership.

7.4. Implications for Implementation of Governance

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

PART 8

CRITICAL SUCCESS FACTORS

8. Critical Success Factors

The following factors will be critical to the successful implementation of this DMP and, thereby, to the development of tourism in Santorini, which is sustainable for the foreseeable future:

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

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

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

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

- Sustainable community: Commitment to finding solutions that deliver sustainable energy usage, waste management, and water consumption, plus sufficient availability of affordable housing for residents, particularly socially essential workers.

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

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

- Visitor experience and 'sense of place': Commitment to improving the visitor experience as identified in this DMP and to a consistent projection, in both infrastructure and product/experience development as well as in marketing messages, of the brand characteristics that define and distinguish Santorini.

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

ANNEX 1

ACTION PLAN
SANTORINI

Annex 1: Action Plan - Santorini

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

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

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

'Live' Plan

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

Stakeholder Participation

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

Destination Management Plan Implementation Organisation

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

<u>DMP Action Plan for Santorini</u>

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

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

[61] 'Carrying capacity' taking account of quality of life (as per resident perceptions), quality of visitor experience, quality of environment, infrastructure constraints, etc – potentially using UNWTO's 'Managing Tourism Growth' (2019), as a framework.

	• Set **a cap on the number of cruise passenger disembarkations** per day at Fira (e.g. 5,000-8,000) and Athinios. • Develop **a schedule of embarkation and disembarkation times.** • Introduce **a cruise passenger levy.** • Stagger air arrival and departure slots at peak times to reduce congestion. • Construct **off-airport vehicle rental base**, with shuttle between airport and rental base, to reduce traffic congestion at airport. • Introduce and enforce **'park and walk'** systems at Oia and Fira, by allocating more space for parking outside these towns and creating pedestrian-only zones. (See Section 2 below)		place and enforced. • Cap in place and enforced. • Embarkation/ disembarkation schedule in place and enforced. • Levy rate agreed and collected. • System of staggered arrival/departure slots in place. • Off-airport vehicle rental base created, with shuttle connection • (See Section 2 below)
Animal welfare	• Introduce internationally recognised certification to ensure proper practices of donkey/mule riding, especially from Fira Old Port and at Oia.	Santorini Municipality	• Certified approval by recognised international animal welfare organisation
Inter-islands cooperation: to spread the visitor benefit and load	• Develop **joint packages** and undertake promotion with neighbouring islands.	DMO	• Package in place within deadline.
Integrated multi-modal transport plan for passengers and freight, with integrated transport hub	• Review option to develop a new **multi-modal transport hub** to service seaborne excursion passengers (i.e. cruise and ferry) and visitors renting vehicles (i.e. cars, ATVs, motorcycles etc.)	Santorini Municipality / Cyclades Chamber	• Decision made
Sustainable practices by tourism businesses	• Develop and distribute a **guide to sustainable practices** for all tourism operators. • Develop and run a **training course on sustainable practices** for tourism operators.	DMO	• Guide developed and distributed as per target. • Training delivered as per target.

Strict controls on cruise ship pollution	• Monitor **air and water pollution**. • Introduce and enforce **controls**: - Aim for an agreement whereby a percentage of all cruise ships entering the caldera are powered by **liquefied natural gas (LNG)** by (year to be agreed). - Agree all cruise ships entering the caldera will have **exhaust gas cleaning systems (EGCS)** and **advanced wastewater treatment systems (AWTS)** by (year to be agreed). - Develop a **programme of inspections** to ensure cruise ships comply with agreed procedures to minimise pollution. - Agree **reporting requirements** by cruise lines. - Maintain awareness of **best practices** in destination management relating to cruise ships. • Apply **differentiated tariffs** for cruise ships with good/bad environmental performance (e.g. LNG=powered, EGCS and AWTS systems etc.). • Consider **new port development**, whereby cruise ships would be required to use shore-based power hook-up facilities. (See 'Urgent action on infrastructure' below.)	South Aegean Region/ Santorini Municipality/Cyclades Chamber	• Independent measurement of air and water quality. • Procedures introduced, monitored and enforced as agreed.
Best practice waste management/ recycling	• Develop system for **recycling** of household and business waste. • Address **landfill** issues: capacity and unsightliness. • Introduce/expand systems for recycling **'clean' industrial wastewater** in industrial/agricultural processes (e.g. for vineyards) • Clear **litter** regularly from roadsides, particularly in the main season. • Introduce ban on discretionary **single-use** plastic items. • Design and deliver **training programmes** and practices of waste management for businesses and other relevant stakeholders.	South Aegean Region/ Santorini Municipality/ Cyclades Chamber	• Recycling system in place. • Waste disposal and landfill issues satisfactorily addressed. • Increase in use of recycled, 'clean', industrial waste-water in industrial/agricultural processes. • Regular litter-clearing programme in place. • Ban in place, reduction in single-use plastic. • Training programmes in place and delivered to x% of businesses.

Water and power conservation/ management measures	• **Training programmes** in energy and water conservation for tourism operators. • Increase **visitor awareness** of the impact of their behaviour and enlist their cooperation in reducing water and energy consumption through: - Clear, informal messages at key points (e.g. accommodation – via check-in and in-room signage; on tours – via guides; at rental desks and tourism operators – when booking & collecting; online and in brochures); - "Keep Santorini tidy" campaign in the main season.	South Aegean Region/ Santorini Municipality/Cyclades Chamber	• Training programmes in place and delivered to x% of businesses. • X% reduction in water and energy consumption by visitors by (year to be agreed).
Strengthening of residential communities	• Undertake annual **residents' satisfaction surveys** to gauge residents' tolerance of visitor numbers and impact on their daily lives. • Agree limits on extent of **short-term rentals** in residential neighbourhoods, and on rental periods – cf. Paris, San Francisco, Reykjavik et al – 60-120 days p.a. • Ensure appropriate **balance between regulations** applying to individually owned properties and multiple properties in single business ownership. • Ensure availability of **affordable housing for residents**, and that demand for visitor accommodation does not price residents out of the housing market. • Ensure availability of decent **accommodation for seasonal workers.** • Ensure visitors use **parking** on the edge of urban centres and villages – through creation of parking areas and enforcement. • Engage **local communities** in the development of new visitor experiences.	Santorini Municipality/ Cyclades Chamber	• Annual surveys, showing increased residents' tolerance, as a result of successful implementation of measures aimed at minimising community disruption/congestion by visitors. • Clear limits in place and enforced. • Effective and equitable regulations in place for both types of rental property. • Sufficient affordable housing available for residents. • Suitable quality accommodation available for seasonal workers as required. • Minimal visitor traffic parked in urban centres and villages. • Visitors engaged and influential in the future of tourism in their communities and satisfied

			with any new developments.
Conservation of landscapes/ townscapes to protect heritage and enhance sense of place	• See Priority 3 below.	Santorini Municipality/Cyclades Chamber/ DMO	
Urgent action on infrastructure – seaport, airport, roads, water, power, waste	• Set annual **environmental targets**, develop action plans and provide sustainability reporting. • Develop a practical **promotional campaign** for tourism operators to reduce their environmental impact, energy and water consumption and increase their recycling behaviour (e.g. recycling, rainwater collection, plastic use reduction, renewable power sources). • Review options to minimise environmental impact through **infrastructure change** (e.g. aim for the majority of vehicles on Santorini to be electric by (year to be agreed); develop network of electric vehicle charging points; restrict importation of any new vehicles to electric-only by (year to be agreed)). • Improve road infrastructure, based on the guidelines of the Accessibility Study for the Cultural Route of Santorini, particularly nearby key attractions and popular sites. • Use of **electric mini-buses** for Santorini Culture Bus – proposal included in the Cultural Route's Master Plan. • Invite **car-sharing app**-based company to set up business in Santorini. • Review options for **new port development**, whereby cruise ships would be required to use shore-based power hook-up facilities.		• Environmental plan, with targets, in place. • Improved environmental practice by tourism operators, particularly reduced energy and water consumption and increased recycling. • Long-term environmental strategy in place. • Improved road infrastructure. • Electric minibuses in operation. • Reduced car usage by visitors • Decision made regarding new port.
Carbon-neutral status for Santorini	• Aim for Santorini to be carbon-neutral by (year to be agreed) through: - Consultation to secure agreement with residents and businesses; - Development of environmental policy and certification system.	South Aegean Region/ Santorini Municipality/Cyclades Chamber	• Agreement secured with residents and businesses • Carbon-neutral status achieved within target date.

Strategic Priority 2: Managing Tourism to Ensure Quality of Life and of Visitor Experience – ensuring that these match the brand (see 6 below)

Action Area	Actions	Suggested Lead	Performance Measures
Point of arrival welcome and information	• Provide simple **map/guide** and promote best available destination apps at points of arrival. • Develop **airport arrival** welcome signage and artworks to convey 'sense of place' on arrival – in arrivals and public area of terminal.	DMO	• Map and apps developed. • Attractive airport signage in place and appropriate artwork reflecting Santorini's 'sense of place'.
Improved signage – related to visitor management plan	• Undertake a comprehensive **signage review** in Santorini, with 2 key objectives: - To aid visitors and ensure correctness of existing tourism and directional signage; - Removal of illegal and misleading signage. The review must also consider the visitor experience from the airport to different locations. • Develop clear **directional signage** to key locations and visitor attractions throughout the island. • Develop tastefully designed, environmentally coherent, **interpretive signage** to identify and interpret key visitor attractions, trails and facilities.	Santorini Municipality	• Signage review completed with clear recommendations. • Erection of clear, accurate directional signage at relevant points. • Attractive and informative interpretive signage at key points of interest.
Improved interpretation, especially at major sites	• Develop clear, engaging and entertaining methods of **interpretation** at key sites (e.g. Akrotiri, Ancient Theera) - from panels, tableaux and video to holograms, AR/VR. • Produce **themed guides** with informative, but not extensively detailed, information on major sites (e.g. Santorini archaeological guide), with links to further information. • Develop, and keep updated, **online visitor information content** for major sites.	DMO	• Improved, updated interpretive signage in place. • Themed guides produced. • Online content created and regularly updated.

Removal of traffic from Oia and Fira + park and walk – chargeable parking, varying by time of day, time of year	• Ensure adequate **parking** for all types of vehicles on outskirts of Oia and Fira. • Extend and enforce '**pedestrian only'** and **'no parking' zones.** • Introduce **ticketed entry** at peak periods, to be purchased in advance. (See below) • Create suitable **drop-off zones** for coaches in suitable places.	Santorini Municipality	• Parking areas created, sufficient to cope with demand. • Pedestrian-only zones developed and enforced. • Ticketed entry system in place • Drop-off zones created and enforced.
Enhanced public transportation for visitors – easy to use	• Publicise **public transport timetable** to key locations (e.g. Oia, Kamari, Akrotiri). • Extend relevant **public bus frequencies** between major locations (e.g. hotel areas, towns and visitor sites) in peak season. • Implement travel card for unlimited local travel. (A '**Santorini Card'** is among the recommendations of the Cultural Route's Master Plan.) • Set up '**Santorini Culture Bus'** – round itineraries providing access to all the key sites of the Cultural Route – in cooperation with the private sector. • Establish **public transport stops** at/close to all major attractions / museums.	Santorini Municipality	• Public transport timetable produced and disseminated. • 'Visitor-friendly' timetable in place for public bus service. • 'Santorini travel card' in place • 'Santorini Culture Bus' operational. • Public transport stops conveniently close to major attractions.
Ticketed entry to Oia in the evening during peak months	• Introduce **ticketed entry** at peak periods – sell in advance (online). • Mount **vehicle/passenger barrier** to refuse entry to non-ticketed vehicles/passengers. • Review **vehicular access** to certain areas of Oia for tourist related-activities.	Santorini Municipality	• Advance purchase online ticketing system in place. • Vehicle/passenger barrier in place and enforced. • Policy developed on vehicular access to Oia.
Develop Santorini's cultural offer	• Develop Santorini's contemporary **cultural offer**, including promotion of existing assets and creation of new cultural experiences and events (e.g. 'artist-in-residence' and 'writer-in-residence' programmes, 'theatre-on-the-island', cultural festival, mythology interpretation, art, literature et al.). • Develop **cultural festival.** (See Events and Festivals below.)	DMO/ Santorini Municipality	• Cultural programme in place. • Cultural festival established.

	• Implement '**Santorini Cultural Route**' action plan. • Create **historically themed events/period re-enactments,** to showcase life in ancient times at Akrotiri and Ancient Thera. • Develop and promote **art and architecture initiatives**, such as street art, to provide fresh perspectives on the island and expand visitation to new areas.		• 'Santorini Cultural Route' implemented. • Historically themed events/period re-enactments in place in key periods. • Expansion of local art and street art.
Promotion of multiple sunset viewing sites	• Host more **events** in less visited parts of Santorini. • Develop and promote **visitor attractions and facilities** in less visited parts of Santorini – in guides and online.	DMO/ Santorini Municipality	• Collection of sunset-viewing points identified and promoted. • Comprehensive 'inventory' of sites throughout Santorini in place and promoted.
Development of additional appeals and attractions (See also Annex 3 Product/Experience Development Recommendations)	• Develop and promote '**Santorini trails**' as a comprehensive set of themed walking routes – in guides and online. • Ensure appropriate routes are suitable for the physically impaired or elderly visitors in line with **accessible tourism** principles. • Develop **agri-tourism experiences** for visitors (e.g. grape/olive-harvesting) and links between producers and restaurants. • Attract luxury spa investment in line with Santorini's exclusive destination aspiration. • Develop **educational courses** (e.g. painting, poetry, writing, cookery, language-learning et al) and **retreats** (e.g. yoga Pilates et al) as part of the off-season offer. • Develop inspiring, Santorini-specific **storytelling experiences** (e.g. interpreting local history/mythology/culture) at specific sites around Santorini (e.g. archaeological sites, sunset-viewing sites, marine locations et al.)	DMO	• 'Santorini Trails' established and promoted online/in print. • Appropriate routes made accessible. • Agro-tourism experiences in place for visitors; links established between producers and restaurants. • Critical mass of luxury spa treatments and facilities in place to underpin Santorini's aspiration as an exclusive destination. • Educational courses and retreats in place. • 'Portfolio' of storytelling experiences in place around Santorini.

'Cultural Route of Santorini' (EU tourism project announced early in 2019)	• Implement 'Cultural Route of Santorini' masterplan, which is defined as an ecosystem of local lifestyle/ traditions/attractions/experiences, to be promoted through locally distinctive elements (e.g. architecture, local cuisine, geology), including: - Marketing plan - Online website of the Route including the promotion of all relevant sites / attractions - Social media strategy - Preservation and improvements of key sites - Preservation and improvements of walking trails - Santorini Culture Bus & Santorini Card - Wine Route of Santorini (network of wineries) - Friends of Santorini's Museums (network of small, private museums)	DMO/ Santorini Municipality	• 'Cultural Route of Santorini' masterplan successfully implemented.
Events and Festivals (See also Annex 3 Product/Experience Development Recommendations)	• Develop **various events and festivals**, primarily aimed at extending the season (See Events and Festivals in 5 below.)	DMO/ Santorini Municipality	• Various festivals established. • (See Events and Festivals in 5 below.)
Mobile app(s) to help visitors enjoy Santorini to the maximum, avoiding congestion	• Develop **mobile app**, with real-time information on traffic/passenger volumes, including booking facility.	DMO/ Santorini Municipality	• Mobile app developed.
Professional tourist guiding standards and regulations	• Review current **guiding standards**, introduce **guide certification** and enforce compliance. • Attract/train **German-speaking** guides. • Review options and agree procedure for certifying/applying minimum standards relating to guides from elsewhere, whose **foreign language expertise** is not available locally (e.g. Chinese).	DMO	• Guiding standards confirmed and certification scheme introduce. • Availability of appropriately trained/certified German-speaking guides. • Procedure in place and enforced.
Improved cruise visitor management (See also 1 above)	• Use new **technologies** (apps and others) to stimulate dynamic time-based dispersal. • Establish **real time information system** for cruise visitors on the island. • Set up local visitor management group to monitor and address visitor management issues (e.g. including **education** for local people, suppliers and visitors on managing visitor flows). • Set **timeslots** for group access to popular attractions and/or events aided by real-time monitoring.	Santorini Municipality	• See mobile app above. • See mobile app above. • Local visitor management group established, visitor management issues identified and effectively addressed. • Timeslot allocation policy developed and effectively implemented.

Strategic Priority 3: Maintaining the Quality of Santorini's Built and Natural Environment

Action Area	Actions	Suggested Lead	Performance Measures
Balanced land use plan, to manage further development and ensure availability of land for vineyards, fruit and vegetable production, etc.	• **Zone areas** for agricultural, tourism, other business and residential uses. • Consider provision of **financial support** for the expansion of productive agricultural land.	Santorini Municipality	• Land use plan in place, with areas zoned for agricultural, tourism, other business and residential uses. • Decision made on funding and, if agreed, scheme in place to support the expansion of productive agricultural land.
Protection of Santorini's core natural and built physical assets	• Review and, where necessary, **update planning and design guidance** and permissions required. • Limit numbers of **new accommodation** establishments. • Develop/apply **protected designations** for outstanding or important natural environmental areas and built heritage. • Review regulation on access for large groups to **popular attractions** and develop protocols to manage visitor flows. (See also 'timeslots' in Improved cruise visitor management above.) • Prepare **environmental management plan** for sensitive natural areas, including Thirassia. (See also 'Santorini Cultural Route' masterplan.)	Santorini Municipality/ Cyclades Chamber	• Planning and design guidance updated, with clear identification of types of permission required for key activities. • Specify types of new accommodation permitted within the updated planning and design policy guidelines. • Protected designation scheme in place. • Protocols in place for access to popular attractions. • Environmental management plan in place.
Public realm management and presentation	• Prepare and implement an integrated **plan for public realm management** to ensure public areas are well maintained and project Santorini's 'sense of place' (including street furniture, public art, building/architectural heritage maintenance, beach management, et al). • Prepare **design guidelines** for new development. (N.B. These should be incorporated in the planning and design guidelines identified above under Protection of Santorini's core natural and built physical assets.) • Ensure regular, efficient **litter clearance** in towns, villages and alongside all roads. • Ensure **street-cleaning regimes** fit with tourism facilities and with peak times.	Santorini Municipality	• Public realm management plan in place and linked to planning policy proposed above under *Protection of Santorini's core natural and built physical assets.* • Design guideline sin place. (See also *Protection of Santorini's core natural and built physical assets above.*) • Clean roads and street – litter cleared on regular basis. • Minimum disruption to visitors and residents from street-cleaning timetable.

Strategic Priority 4: Optimising the Benefits of Tourism

Action Area	Actions	Suggested Lead	Performance Measures
Focus on high yield markets, all year round, with increasing proportion of independent travellers	• Focus marketing activity on primary markets, with supporting activity in secondary markets where viable, as identified in *Annex 2 Marketing Action Plan*: - Priority 1: "Invest and Grow" ("romantic escapers" from Italy and UK; "foodies" from Italy, UK and USA). - Priority 2: "Persuade and Build" ("romantic escapers" and "foodies" from Italy UK and Germany; and 'special interest / self-improvers and "outdoor enthusiasts" from UK and Germany).	DMO	• Marketing focused on priority markets, as per *Marketing Action Plan*
Maximise revenue and minimise impact of main season visitors	• Provide visitor information and introduce visitor management measures (see above) to maximise revenue and minimise the impact of cruise visitors, as identified in *Annex 2 Marketing Action Plan*: - Priority 3: "Manage and Minimise Impact" (cruise visitors, predominantly from Europe and USA).	DMO	• Revenue maximised and impact minimised to achieve an optimum balance for Santorini, as per *Marketing Action Plan.*
Long-term aspiration as exclusive destination	• Commit to long-term aspiration for Santorini as an exclusive destination by focusing on investment development needs as identified in *Annex 2 Marketing Action Plan*: - Priority 4: "Long-Term Future Development" ("sybarites" from USA, UK, Italy, France and Russia) (See also *Development of additional appeals and attractions* in 2 above and *6 Enhancing the Brand* below.)	DMO/ Santorini Municipality	• Commitment by key stakeholders to developing Santorini as an exclusive destination.
Quality assurance for tours and excursions, including guiding	• Review current **tour guide arrangements**, focusing on requirements/standards for guides, with the aim of increasing employment of locally trained and, where appropriate, certified guides. (See also *Professional tourist guiding standards and regulations* in 2 above.)	DMO	• Procedures in place and enforced.
Strengthened engagement of village communities in tourism	• Identify and work with **'champion' in villages/towns** to liaise and lead tourism efforts on behalf of the community – whether in developing or managing visitor flows/restricting tourism development. • Encourage creation of **authentic tourism experiences** that engage both residents and visitors.	DMO/ Santorini Municipality	• 'Champions' appointed in key villages/towns. • Inventory of tourism experiences considered authentic agreed with residents.

	• Optimise visitor enjoyment of **local festivities and activities**, subject to community agreement. • Provide interpretation for visitors regarding local values and traditions, to improve **visitor awareness of tourism impacts** (e.g. via mentions online, in visitor brochures, and tourist guide education).		• Promotion of local festivities and activities to visitors, only where agreed by local communities. • Respectful behaviour by visitors in and towards local communities.
Stronger local supply chains – more fruit and vegetables, clothing, crafts, jewellery, wine, ceramics,	• Ensure strong **links** between local producers and tourism operators. • Develop a distinctive **brand** identity for all Santorini products. • Establish outlets (e.g. in Fira and airport) for Santorini produce and products.	DMO/ Santorini Municipality	• More local produce sold in Santorini establishments (i.e. hotels, restaurants etc.). • Santorini brand identity created and used on Santorini produce, products and souvenirs. • Outlets stocking Santorini-branded produce and products.
Improved access to, and interpretation of, heritage sites	• Establish convenient **public transport stops** and adequate/controlled parking facilities, within site constraints, at major heritage sites. (See *Enhanced public transportation for visitors* in 2 above.) • Review parking and access to **Ancient** Thera, in light of topographical constraints. • Improve **interpretation**, using imaginative communication and contemporary methods. (See *Improved interpretation*, in 2 above.)	Santorini Municipality	• Convenient public transport stops; adequate parking within site constraints. • Optimum facilities to enable visitors to access Ancient Thera. • See *Improved interpretation*, in 2 above.
All year season (see 5 below)	• See Strategic Priority 5 *Extending the Season* below.	DMO/ Santorini Municipality	• See Strategic Priority 5 *Extending the Season* below.

Strategic Priority 5: Extending the Season – new experiences for the off-season, providing a model for attracting higher revenue summer tourism

Action Area	Actions	Suggested Lead	Performance Measures
Creation and promotion of new experiences and products to high yield niche markets	• Develop Santorini's contemporary **cultural offer.** (See *Develop Santorini's cultural offer* in 2 above.) • Develop **educational courses** (e.g. painting, poetry, writing, cookery, language-learning et al) and **retreats** (e.g. yoga Pilates et al) (See *Development of additional appeals and attractions* in 2 above.) • Develop inspiring, Santorini-specific **storytelling experiences** (e.g. interpreting local history/mythology/culture) at specific sites around Santorini (See *Development of additional appeals and attractions* in 2 above.) • Attract **luxury spa investment** in line with Santorini's exclusive destination aspiration. (See *Development of additional appeals and attractions* in 2 above.)	DMO/ Santorini Municipality	• Off-season cultural programme in place. • Off-season educational courses and retreats in place. • 'Portfolio' of storytelling experiences in place around Santorini. • Critical mass of luxury spa treatments and facilities in place.
Creation and promotion of new events and festivals to high yield niche markets (See also Annex 3 Product/Experience Development Recommendations)	• Develop **wine festival.** • Develop **olive-harvesting** festival. • Develop **gastronomy** festival • Develop **cultural festival.** • Develop **walking** festival. • Develop **competitive sporting events**, to build on the success of the Santorini Experience run/swim race (off-season).	DMO/ Santorini Municipality	• Wine festival established. • Olive-harvesting festival established. • Gastronomy festival established. • Cultural festival established. • Walking festival established. • New competitive sporting events established.
Pilot off-season incentive travel campaign	• Create **prestige packages** involving top hotels, restaurateurs, wine producers, wellness product providers, using Santorini brand. • Run **pilot promotional campaign**, focused on one or two best prospect markets (e.g. Italy, UK), subject to airlift.	DMO	• Packages in place. • Extended airlift in place; promotional campaign successful.

Strategic Priority 6: Enhancing the Brand

[N.B. Critical to ensure visitor experience lives up to the romantic, and ultimately exclusive, brand promise.]

Action Area	Actions	Suggested Lead	Performance Measures
Exclusive image, driven by premium quality products and experiences	• Attract **luxury spa investment** in line with Santorini's exclusive destination aspiration. (See *Development of additional appeals and attractions* in 2 above.) • Focus **new developments** on appealing to high yield markets, as identified in 3 above. • Minimise congestion and manage **visitor flows** to ensure Santorini delivers a visitor experience consistent with an exclusive '5-star' destination, as outlined in 2 above.	DMO/ Santorini Municipality	• Critical mass of luxury spa treatments and facilities in place. • See KPIs in 3 above. • See KPIs in 2 above.
Primary distinguishing brand characteristics: **Romance and Gastronomy**	• Develop products and experiences with **romantic** evocations – in terms of structure, content, quality, style and location (e.g. accommodation, restaurants, sunset-dining, tranquillity et al). (See *Development of additional appeals and attractions* in 2 above.) • Develop local **gastronomic** products and experiences (e.g. work with Aegean Cuisine brand; gastronomy festival etc.) (See *Development of additional appeals and attractions* in 2 above.)	DMO/ Santorini Municipality	• Critical mass of products and experiences evoking a sense of romantic seclusion in scenically inspiring locations. • Critical mass of products and experiences, which celebrate Santorini's gastronomic culture and heritage and raise its quality above its competitors.
Supporting brand characteristics: **Cultural Heritage and Wellness (aspirational)**	• Develop products and experiences rooted in local **cultural heritage** (e.g. expanded cultural offer, cultural festival and events, improved interpretation, storytelling, 'Cultural Route of Santorini' et al). (See 2 above.) • Attract **luxury spa investment** and develop high-end, luxury wellness spas and spa treatments, in line with Santorini's exclusive destination aspiration (See *Development of additional appeals and attractions* in 2 above.)	DMO/ Santorini Municipality	• Critical mass of well-interpreted and creatively presented cultural facilities and cultural programme in place. • Critical mass of luxury spa treatments and facilities in place.

Integrated brand for tourism, wine (unique Assyrtiko) and other local products	• Feature wine (Assyrtiko) and other locally unique/specific products (e.g. white aubergines, cherry tomatoes and fava beans) as distinctive elements of Santorini's gastronomic brand value in marketing communications.	DMO	• Santorini products integrated as part of the Santorini brand in marketing communications
Thirassia – 'Santorini as it once was'	• Explore **Thirassia residents' views** on further (sensitive) development. • Review potential for limited, exclusive, **boutique, 'romantic hideaway'** development on Thirassia	Santorini Municipality	• Survey of Thirassia residents' attitudes towards development. • Conclusion reached on desirability and viability of this development.
Santorini – a leader in sustainable destination management practice	• Establish a reputation for Santorini as **leader in sustainable tourism** management, through application of sustainability measures outlined in 1, 2 and 3 above.	DMO/ Santorini Municipality	• See KPIs in 1, 2 and 3 above.
Santorini brand and visual brand identity	• Design a Santorini **visual brand identity**– for all businesses and local organisations, reflecting the island's 'sense of place', based on key brand values identified in the DMP (romantic volcanic character, gastronomy, exclusivity). This should encompass both agricultural and tourism sectors as an all-island brand identity. • Develop **brand identity guidelines** and signage protocol (technical design application).	DMO	• Visual brand identity developed. • Technical brand identity guidelines created.
Brand communications plan	• Develop **brand communications plan**, based on Santorini's key brand narratives (as outlined in the DMP) and underpinned by Santorini's core brand characteristics. • Secure **stakeholder commitment** to using the brand identity in their marketing communications. • **Train stakeholders** how to communicate the Santorini brand (brand narrative and visual identity) in their own marketing communications.	DMO	• Brand communications plan developed. • Widespread stakeholder usage of the brand identity in their marketing communications. • Widespread, consistent and effective communication of Santorini's core brand values in their marketing communications.

Crisis Preparedness/ Civil Protection

Action Area	Actions	Suggested Lead	Performance Measures
Legal framework for crisis response	• Review, identify any necessary changes and update **legal framework** for crisis response.	South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• Framework up-to-date.
Operational framework for emergency response	• Review and, if necessary, update **'first responder' protocols**, identify key risk areas, and allocate responsibilities, so team can act as soon as crisis hits or threatens. • Develop **training programme** with responsibilities for action. • Specify frequency of 'live' scenario exercises and **skills refreshment**. • Explore **exchange of best practice**, incl. visits to other crisis management centres (e.g. Caribbean – hurricane, Iceland – volcanic et al).	South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• 'First responder' protocols up to date. • Up-to-date training programme in place, with responsibilities clearly identified. • Skills refreshed and 'live' scenario exercises undertaken regularly. • Crisis management exemplars identified, relationships built with them; lessons learnt and incorporated into training and response protocols.
Crisis management plan	• Develop **crisis management and communications plan** with responsibilities & timetable. • Specify frequency of 'live' scenario exercises and **skills refreshment**. • Explore **exchange of best practice**, incl. visits to destinations recognised as crisis management and communications exemplars.	South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• Up-to-date crisis management and communications plan in place, with responsibilities clearly identified. • Skills refreshed and 'live' scenario exercises undertaken regularly. • Crisis management exemplars identified, relationships built with them; lessons learnt and incorporated into training and response protocols.
Crisis recovery plan	• Identify those **responsible for key elements of crisis recovery** – as part of crisis management plan. • Explore **exchange of best practice**, incl. visits to destinations recognised as crisis management and communications exemplars.	South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• Responsibilities allocated to key personnel. • Crisis management exemplars identified, relationships built with them; lessons learnt and incorporated into training and response protocols.

Enabling/ Supporting Actions (Cross-Cutting)

Action Area	Actions	Suggested Lead	Performance Measures
Business support and environment	• Introduce **quality assurance programme / quality label** for businesses that meet appropriate standards. • Safeguard quality of **cultural/natural heritage and attractions.** (See *Protection of Santorini's core natural and built physical assets* in 3 above.) • Introduce **tourist guide certification.** (See *Professional tourist guiding standards and regulations* in 2 above.)	DMO/ Santorini Municipality	• Majority of Santorini accommodation businesses quality assured. • See *Protection of Santorini's core natural and built physical assets* in 3 above. • See *Professional tourist guiding standards and regulations* in 2 above.
Industry education and training	• Provide training for tourism-related businesses on sustainable practices in **energy usage, waste management and water consumption.** (See 1 above.) • Provide training for tourism-related businesses in communicating the **Santorini brand values.** (See *Brand communications plan* in 6 above.) • Provide **practical information** about traffic restrictions, parking facilities, taxi charges, bus stations, and changes in regulations etc. – online and via business communications channels (e.g. Cyclades Chamber of Commerce et al). • Run **seminars on visitor demands, behavioural and market trends** for the travel industry in Santorini, as required.	South Aegean Region/ Cyclades Chamber/ Santorini Municipality/ DMO	• Regular training delivered – improved sustainable practices adopted by industry. • Regular training delivered – Santorini brand values communicated consistently and effectively by industry. • Updates provided on a regular basis, as required. • Seminars undertaken and valued by the tourism industry.
Research and intelligence	• Undertake an annual survey of **residents' satisfaction** with tourism in Santorini, focusing on its impact on their livelihood and quality of life. • Undertake an annual survey of **visitor satisfaction** with their **experience in Santorini.**	DMO	• Annual residents' satisfaction survey undertaken and changes monitored. • Annual visitor satisfaction survey undertaken and changes monitored.

Performance measurement/management	• Maintain an annual assessment of Santorini's **tourism performance** – i.e.: ferry, cruise and airport arrivals, accommodation capacity and occupancy, employment in tourism-related jobs and expenditure generated/value created for Santorini – through e.g. national tourism statistical accounts, FRAPORT, cruise, ferry and other data sources, supplemented by further specific surveys where required. • Monitor **tourism impact** through key indicators (e.g. bed-nights density (number/km2), bed-nights intensity (number/citizen), air-transport intensity (pax per bed-night), seasonal fluctuations, ratings of key attractions/sites) to aid sustainable destination management.	DMO/ Santorini Municipality	• Ongoing awareness of Santorini's tourism performance, updated annually. • Annual impact assessment.

Implementation Mechanisms and Governance

Subject to agreement on the mechanism adopted to implement the DMP, the following actions are proposed:

Action Area	Actions	Suggested Lead	Performance Measures
Implementation mechanism/body to implement the DMP	• Establish a **mechanism for implementing the DMP**, with clear role identified (See options in DMP.)	South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• Implementation mechanism/body in place, with role clearly identified.
Destination Management Strategy Board	• Establish a **Strategy Board** to oversee DMP implementation. (e.g. A coalition of key organisations including senior representatives from the South Aegean Region, Cyclades Chamber of Commerce and Santorini Municipality – working in cooperation with other key organisations, such as Hoteliers Association, FRAPORT, Aegean, SETE, and other key local organisations from the public and private sectors.) • **Role and meeting frequency** to be determined once Board is in place.	South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• Strategy Board in place. • Role and meeting frequency determined.
'Strategic Priorities' Action Groups	• Establish **6 action groups**, each responsible for addressing one of the 6 'Strategic Priorities' (SPs) in the DMP, with the following responsibilities: ○ Prepare and implement a detailed plan of action for each SP; ○ Monitor progress against each SP; ○ Report on progress to Strategy Board.	South Aegean Region/Cyclades Chamber/ Santorini Municipality	• 6 SP action groups in place. • Regular progress reports to Strategy Board.
Industry engagement by Cyclades Chamber of Commerce	• Identify need for and, where appropriate, prepare business improvement district **(BID)-type operations** to promote participation/funding in destination management by local businesses in key areas (e.g. Oia, Fira, South Santorini). • Chamber to provide **local discussion platforms** and focus for skills development/training needs identification for industry associations, community groups and other stakeholders. • Community groups to act as channel of communication with residents about key destination management decisions. (See also *Strengthened engagement of village communities in tourism* in 4 above.)	Cyclades Chamber/ Santorini Municipality	

DMP national planning agenda	• Ensure **integration of relevant Santorini DMP issues** with national planning agenda. • Identify areas where attention/action may be required by relevant **government departments and agencies** – for coordination by Ministry of Tourism	DMO/South Aegean Region/ Cyclades Chamber/ Santorini Municipality	• Integration between Santorini DMP and national planning agenda. • Issues requiring attention/action at national level brought to the attention of relevant national bodies.

ANNEX 2

MARKETING PLAN
SANTORINI

Annex 2: Marketing Plan - Santorini

Strategic Focus

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

Guiding Principles

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

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

- Cost-effectiveness: A limited range of the most cost-effective activities is proposed, acknowledging the need to achieve maximum impact with the limited resources available.

- Targeted marketing: Marketing should not be spread too thinly and should focus on a limited range of the best prospects for Santorini, targeting those who will deliver most benefits with least negative impact, particularly those more likely to stay longer, spend more, return, and visit outside the main season.

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

Key Points

- Santorini should **work with GNTO** to maximise brand-compliant coverage of Santorini in GNTO marketing communications. As well as ensuring a consistent presentation of the Santorini brand in all marketing collateral, this will enable Santorini to achieve significantly more distribution of its message than it could achieve on its own, at a fraction of the cost.

- Some activities are split between **development** in years 1-2 (i.e. persuading airlines to fly in the off-season and developing off-season packages) and **promoting** these routes in years 2-5 (assuming at least one off-season direct flight has been secured in year 1 to start flying in year 2).

- The majority of activities are **human resource-intensive**, rather than high cost.
- An attractively designed, brand-compliant, informative, practical, easily navigable **website** with links to tourism businesses is a priority. This will underpin all marketing activity and transcend all segments.

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

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/ Budget (Euros) est.
Priority 1: **"Invest and Grow"** (Years 1-5 ongoing)	**Increase revenue**	**"Romantic Escapers/ Honeymooners"**	• Tranquillity • Scenery • Gastronomy • Wine	Primary • Italy • UK Secondary • France • Germany • Switzerland • Austria • Netherlands • Spain	• Achieve optimum and appropriate coverage of Santorini in GNTO marketing communications • Ensure GNTO marketing (website, campaigns, brochures et al) reflect Santorini brand values & narratives. • 6 social media campaigns (3 p.a. p. country (Italy, UK), featuring different brand narrative themes. • 10 press/bloggers/influencer visits • Engage PR agency to develop campaign to target key publications, influencers, bloggers etc., particularly for major events. • Product representation in appropriately targeted and cost-effective niche domestic or international trade fairs (e.g. https://www.abridesexpo.com, https://www.destinationweddingandhoneymoonshow.co.uk/, https://www.iltm.com/, http://luxurytravelmart.ru/, https://bit.fieramilano.it/)	• Optimal, appropriate and brand-compliant coverage of Santorini in GNTO marketing • Level of engagement, click-through to tourism operators, bookings • 10 positive articles by press/bloggers • Improvement in the positioning, awareness, engagement and conversion of Santorini in primary and secondary markets.Number of trade fairs attended; valuable contacts made. • Inclusion of Santorini in tour operators' programmes, amount of business resulting from fairs. • Trade-readiness, ongoing trade engagement.	• N/A (human resource only) • Euros 30,000 • Euros 40,000 p. market (to cover all PR activity in key markets for all target segments – i.e. 'romantic escapers' et al) • Dep on number of fairs attended.

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

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/ Budget (Euros) est.
Priority 2: **"Persuade and Build"** Off-Season (Years 1-2: develop-ment; years 3-5 marketing)	**Extend season**	**"Romantic Escapers/ Honeymooners"**	• Tranquillity • Scenery • Gastronomy • Wine	• Italy • UK • Germany	**Years 1-2:** • Persuade 2 airlines (1 UK, 1 German) to extend direct flights into the shoulder/off season	**Years 1-2:** • 2 direct air services extended by 2 months ea. (1 from UK & 1 from Germany)	**Years 1-2:** • N/A (human resource only)
					Years 3-5: • 2 new off-season packages (1 in UK, 1 in Germany) • Achieve optimum and appropriate coverage of Santorini in GNTO marketing communications.	**Years 3-5:** • 2 off-season packages (1 UK, 1 Germany) • Optimal, appropriate and brand-compliant coverage of Santorini in GNTO marketing communications.	**Years 3-5:** • N/A (human resource only) • N/A (human resource only)
					• Ensure GNTO marketing (website, campaigns, brochures et al) reflect Santorini brand values & narratives. • 6 social media campaigns p.a.: i.e. 1 campaign x 3 segments ("romantic escapers", "special interest", "outdoor enthusiasts") x 2 countries (UK, Germany)	• Optimal, appropriate and brand-compliant coverage of Santorini in GNTO marketing • Level of engagement, click-through to tourism operators, bookings	• N/A (human resource only) • Euros 30,000

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/ Budget (Euros) est.
<u>Priority 2:</u> "Persuade and Build" (cont.)		**"Romantic Escapers/ Honeymooners"** (cont.)			• 16 visits by press/bloggers/ influencers p.a (4 visits p. segment x 4 segments) • Build supportive environment – operators who can provide the essentials for an off-season short break (e.g. transport providers, selected accommodation operators, food outlets, attractions and activity operators), who would take a joint risk to remain open, add services. • Product representation in appropriately targeted and cost-effective niche domestic or international travel trade fairs. (e.g. https://www.abridesexpo.com, https://www.destinationweddingandhoneymoonshow.co.uk/, https://www.iltm.com/, http://luxurytravelmart.ru/, https://bit.fieramilano.it/) • Engage PR agency to develop campaign to target key publications, influencers, bloggers etc., particularly for major events	• 10 positive articles by press/bloggers • Number of establishments and stakeholders willing to participate, number of bookings. • Number of trade fairs attended; valuable contacts made • Inclusion of Santorini in tour operators' programmes, amount of business resulting from fairs. • Trade-readiness, development and ongoing trade engagement. • Improvement in positioning, awareness, engagement and conversion of Santorini in primary and secondary markets.	• N/A (human resource only and hosting by Santorini tourism businesses) • Dep on number of fairs attended. • See PR agency costs per market above.

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing Action	Key Performance Indicators	Resource/ Budget (Euros) est.
<u>Priority 2:</u> **"Persuade and Build"** (cont.)		**"Foodies"**	• Gastronomy Wine	• Italy • UK Germany	• Targets incl. in cells above for all 4 segments ("Romantic Escapers', "Foodies", Special Interest", "Outdoor Enthusiasts") for years 1-2 & 3-5. • Engage PR agency to develop campaign to target key publications, influencers, bloggers etc., particularly for major events. • Product representation in appropriately targeted and cost-effective niche domestic or international travel trade fairs. (e.g. https://www.fibega.org/, https://www.tourismexpo.ru/, https://www.anuga.com/ and https://www.tournatur.com/, https://www.adventureshow.com/) • Develop series of short (1 min.) videos for online use based on the identified concept. Use ambassadors reflective of target market profile.	• Tactics incl. in cells above for all 4 segments ("Romantic Escapers', "Foodies", Special Interest", "Outdoor Enthusiasts") for years 1-2 & 3-5. • Increase the positioning, awareness, engagement and conversion of Santorini in primary and secondary markets. • Number of trade fairs attended; valuable contacts made. • Inclusion of Santorini in tour operators' programmes, amount of business resulting from fairs. • Trade-readiness, development and ongoing trade engagement. • Level of engagement, number of video views and popularity. Number of ambassadors contracted. • Number of participants and popularity.	• Resource requirements incl. in cells above for all 4 segments ("Romantic Escapers', "Foodies", Special Interest", "Outdoor Enthusiasts") for years 1-2 & 3-5. • Dep on number of fairs attended. • Euros 30,000
		"Special Interest/Self-Improvers"	• Various classes/ retreats • (e.g. yoga, art et al)	• UK • Germany			
		"Outdoor Enthusiasts"	• Hiking, cycling, scuba-diving et al				

					• Identify and deliver one catalyst project under each theme – e.g. a festival, conference, competition, project (cf. Red Bull cliff diving competition in Mostar or, previously, Santorini)		
					• Adventure Travel Trade Association (ATTA) Membership and participation in appropriate ATTA events.	• Active membership – number and quality of events participated in.	• c. Euros 1,500 (membership)

Priority	Objective	Segment	Main Products/ Experiences	Country	Marketing action	Key Performance Indicators	Resource/ Budget (Euros) est.
Priority 3 **"Manage and Minimise Impact"** (Years 1-5 ongoing)	**Maximise revenue/ minimise impact**	**"Cruise Visitors"**	• Excursions	• Europe, USA	• Work with cruise lines to optimise value of shore excursions. • Attend Seatrade cruise trade fair https://www.seatradecruiseglobal.com/ to optimise number and type/capacity of cruise ships coming to Santorini and to ensure optimum usage of shore excursions and other cruise-related revenue-generating activities.Work with cruise lines & municipality to improve visitor flows & ease congestion ashore. • Foster synergies between the port and the airport, in order to monitor capacity (e.g. in case of busy days and overcrowding, the municipality and different stakeholders could be informed, to enable them to take action).	• Revenue optimisation from shore excursions and shore-based passenger spend. • Optimal no. of cruise ships p.a., type and capacity. • Efficient management of visitor flows, with minimal congestion. • Cruise pax satisfaction – via survey. • Residents' satisfaction – via survey.	• N/A (human resource only)
Priority 4 **"Long-Term Future Develop-ment"** (Year 3 onwards)	**Increase revenue**	**"Sybarites"**	• Wellness spa • Gastronomy • Wine	• USA • Italy • UK • France • Russia	• Identify land availability and persuade high quality wellness spa company/companies to invest in Santorini • Increase Santorini's profile on key travel and lifestyle websites/platforms. • Engage PR agency to develop campaign to target key publications, influencers, bloggers etc.	• Development land identified. • Additional, high quality wellness spas. • Improve the positioning, awareness, engagement and conversion of Santorini in primary and secondary markets.	• N/A (human resource only) • Included in PR agency costs per market above.

					• Product representation in appropriately targeted and cost-effective niche domestic or international travel trade fairs. (e.g. https://www.luxurytravelfair.com; International Luxury Travel Market (ILTM) https://www.iltm.com/)	• Number of trade fairs attended, valuable contacts made. • Inclusion of Santorini in tour operators' programmes, amount of business resulting from fairs. • Trade-readiness, development and ongoing trade engagement.	• Dep on number of fairs attended.

General Marketing Tactics

Priority	Objective	Segment	Main Products/Experiences	Country	Marketing Action	Key Performance Indicators	Resource/ Budget (Euros) est.
General Basic, but essential, activities, which addresses all objectives and provides themed, practical inform-ation for all market segments	• **Increase revenue** • **Extend season** • **Maximise revenue/ minimise impact**	All segments	• All themes/ brand narratives	• All markets	• Develop website covering key elements of Santorini, which reflects Santorini's brand narratives, with links to businesses for booking. • Enhance and improve indirect air connections, in order to open markets of interest that still do not generate sufficient air demand to support a direct service. • Develop, implement and maintain an online trip-planning tool, with an events calendar, which allows visitors to search for and book experiences by date, activity, tourism setting, natural region and proximity to entry points and communities in the region. • Build image and video library to reflect brand narratives and make available to tour operators, travel journalists, bloggers, influencers et al. • Encourage the industry to increase distribution channels and 'bookability' through	• Attractively designed, brand-compliant, informative, practical, easily navigable website with links to tourism businesses. • New air services in place and number of visitors from new markets. • Number of app users, level of engagement, bookings. • Quality and range of material available, number of requests and usage in positive media environment by third-parties. • Partnerships between different sectors, and bookings.	• Euros 20,000

					packaging and bundling, to achieve greater market penetration for Santorini products/experiences. • Continue investment in web development, SEO and other appropriate technological tactics, platforms and channels. • Develop awareness campaign for visitors to reduce their environmental impact, raising awareness of sustainability issues.	• Visits, web ranking, functionality, level of engagement, response time. • Reduced waste, water consumption, local businesses and residents' satisfaction.	

ANNEX 3

VISITOR EXPERIENCE AND PRODUCT DEVELOPMENT FRAMEWORK

Annex 3: Visitor Experience and Product Development Framework

This *Visitor Experience and Product Development Framework* comprises two parts:

- A collection of themes reflecting Santorini's brand narrative, around which visitor experiences and products should be enhanced and developed;
- A review of existing major visitor experiences and products in Santorini.

A. Santorini Signature Themes – Recommended Actions

This first part identifies development opportunities, based around the five 'signature themes' proposed, plus some general recommendations, to enhance Santorini's appeal to its best prospect target markets.

Timeframe: Short-term = 1-2 years; medium-term = 3-5 years.

A. The Best of Santorini's Wine and Food

	Actions	Timeframe
A1.1	Support leading wine producers to organise a wine festival after the end of high season, in order to extend the season.	Short-term
A1.2	Meet with leading wine producers to review current wine-tasting experiences – frequencies, time of year, ability to extend later and throughout the year. Explore collaboration with boutique and leading hotels, to develop packages for off-season.	Short-term
A1.3	Support leading wine producers to consider route-planning to spread visitors around Santorini. Encourage joint marketing for wine-tasting route, and stronger collaboration with local restaurants.	Medium-term
A1.4	Identify and develop potential culinary experiences with leading chefs, and potential, traditional 'home-cook' experiences. (e.g. See current cooking classes offered by Altana Traditional Houses & Suites, Imerovigli)	Short-term
A1.5	Meet with grape growers to ascertain interest in developing grape-harvesting/wine-making experiences, highlighting Santorini's Assyrtiko grapes and unique vineyards.	Medium-term
A1.6	Meet with key olive growers to ascertain interest in developing olive-harvesting experiences for visitors in October/November.	Medium-term
A1.7	Develop further farm walks/food-tasting experiences, to learn about and sample Santorini's traditional produce (tomatoes, fava, white aubergines, round courgettes, etc.)	Medium-term
A1.8	Meet with Aegean Cuisine, and select certified restaurants, to arrange cooperation with vineyards for post-wine-tasting meals, and other event coordination.	Short-term

B. Santorini at Sunset

	Actions	Timeframe
B1.1	Identify 'must-see' list of sunset spots around Santorini. Agree a route of memorable sunset spots around the island (except Oia), and develop promotional materials (paper and online) – map, online content.	Short-term
B1.2	For each sunset location, identify food and drink providers (e.g. possible 'pop-up' stands), traditional music, local entertainment, etc.	Short to Medium-term
B1.3	Roll out 'Santorini at Sunset' programmes to operators and tour guides. Engage key media to report on new experiences planned at must-see sunset spots.	Medium-term

C. Archaeological Wonders of Santorini

	Actions	Timeframe
C1.1	Improve self-guided information for Ancient Thera and Akrotiri. Consider individual handheld speakers, or other digital guide, with interpretation for each sight/area along tour. Need for content and stories to be developed, to provide visitors with context, history and understanding of ancient civilisation. e.g. better interpretive signage with information at Akrotiri; replicas or photos of antiquities found there (but housed at museum in Fira); digital links; stories about people, culture, life during ancient times, etc.	Short-term
C1.2	Develop 'archaeological hiking trails': routes, maps and promotional material for visitors to hike between key archaeological sites on Santorini.	Medium-term
C1.3	Improve access to Ancient Thera, within topographical constraints (road is difficult and dangerous in places) and develop access policy (e.g. limited numbers, timed ticketing). Provide shaded areas for visitors.	Medium-term
C1.4	Develop website that provides all necessary information (hours of operation, access, prices, services on site, etc.) for all of Santorini's archaeological sites in one place.	Medium-term
C1.5	Develop historically themed events/period re-enactments, to showcase life in ancient times at Akrotiri and Ancient Thera. (e.g. Roman army & chariot race experiences offered at other world historical sights.)	
C1.6	Consider Ancient Thera as a sunset location, with a planned historical experience/short performance, story-telling (short sketches with actors) with drinks and snacks.	Medium-term

D. Santorini from the Sea

	Actions	Timeframe
D1.1	Work with existing day cruise providers to develop alternative itineraries for the caldera, hot springs and/or Thirassia tours –particularly with sunset endings. Most visitors report positive experiences for most of the trip, however invariably the itineraries that end with a sunset experience at Oia, conclude with a negative experience to the end of their trip because of	Short to Medium-term

	overcrowding, etc.	
D1.2	Building on the abundance of currently available watersports (windsurfing, canoeing, jet skiing, kitesurfing, parasailing, paddle boats, SUPs, scuba-diving etc.), encourage experiences in partnership with restaurants that offer end-of-the-day sunsets, spreading visitors around the island.	Short to Medium-term
D1.3	Building on the 5th year of the successful 'Santorini Experience' sporting event (annually in October), and the international attention it has received, identify opportunities for other sporting events (e.g. kayaking, fishing, etc.) that can be organised to bring participants to Santorini during the off-season.	Medium-term

E. Spiritual-Sensual Santorini

	Actions	Timeframe
E1.1	Conduct an audit across Santorini of existing wellness, education and creative retreats. Determine potential for development and expansion during summer and off-season.	Short to Medium-term
E1.2	Conduct an audit across Santorini of spa facilities and services, and identify partners to develop new high-end, luxury spa/wellness facilities and expand existing centres.	Short to Medium-term
E1.3	Identify leading tour operators that specialise in wellness, education and creative retreats globally, and determine requirements for offering experiences in Santorini year-round.	Short to Medium-term

F. General Recommendations

	Actions	Timeframe
F1.1	Develop a 'Writer-in-Residence' programme, possibly organised through the municipality, to develop stories and content about the authentic culture and experience of Santorini. Can be used for marketing and promotion.	Medium-term
F1.2	Develop an 'Artist-in-Residence' programme, to capture Santorini's beauty through various art media, used to exhibit, attract other artists, and for general marketing and promotion.	Medium-term
F1.3	Work with wine producers to develop wine courses both for local residents (youth) and visitors, to engage in the unique wine culture of Santorini.	Medium-term
F1.4	Establish a 'theatre-on-the-island', to encourage the development of a local theatre company and to attract international performances to Santorini. Important to preserve story-telling history and mythology. Can be music venue also. Will broaden performing arts experiences offered to both local community and visitors.	Medium to Long-term
F1.5	Support the Industrial Tomato Museum to improve outreach and access. Signage and roads leading to museum are obscure, and road access can be improved.	Short-term
F1.6	Identify opportunities for festivals and events in the off-season. Currently a small Christmas Bazaar for local community. Look at expansion and related events for tourists, etc.	Short to Medium-term

B. Santorini Product and Experience Review

This second part – in the form of a visitor product and experience review – provides an outline assessment of the current range of major visitor experiences in Santorini, and identifies their existing potential appeal to primary, secondary and emerging markets.

P – Primary S – Secondary E – Emerging

Product	Target Market Appeal				Current (C)/ Aspirational (A) Experience	General Comments
	Romantic escapes honeymooners	Foodies/ Wine Enthusiasts	Cruise Visitors	Sybarites (spa, gastronomy)		
A. Santorini Wine and Gastronomy						
Wine Tours	P	P	P	E	Current Santorini wine tours include visits to most of the island's wine producers. Wine tasting experiences can be booked directly or as part of wine tour visiting multiple locations. Generally, very positive visitor reviews.	Opportunities to extend wine tours to the off-season. Opportunities to partners with local restaurants; collaborative planning for wine routes.
Culinary/ home-cooking experiences	P	P		E	Limited culinary experiences with chefs; limited cooking classes offered through hotels. Positive tourist experiences reported.	Opportunity to identify and develop further culinary experiences for visitors.
Grape - harvesting	P	P		E		Looking at similar experiences elsewhere in Greece and Europe, it may be possible to develop experiences for visitors to help with grape harvesting and wine production, along with cooking experiences using traditional foods
Olive - harvesting	P	P		E		Identify key olive growers who might develop olive-harvesting experiences in October/November.

Product	Target Market Appeal				Current (C)/ Aspirational (A)	General Comments
B. Santorini at Sunset						
Sunset at Oia	P	P		E	Current experience of Oia at sunset is reported as mostly negative due to overcrowding.	Developing alternatives to move tourists to other parts of the island should be reviewed to relieve congestion at Oia.
'Santorini at Sunset'	P	P		E		Building on Oia's famed sunset, develop a must-see list of sunset spots around Santorini with cocktails, food, and music and/or local entertainment at each site. Ideally before summer 2020 season.
Sunset at Fira	P	P		E		With outstanding views, opportunity to develop a sunset experience offering drinks, food, and classical music performance.
C. Archaeological Wonders of Santorini						
Akrotiri	P	S	P	E	Site is well-preserved, and infrastructure/amenities are good, however visitor interpretation (without hired guides) is reported as poor. Interpretation could be significantly improved with more modern techniques and engaging, accessible information.	Introducing digital guides with engaging content, telling history through stories of the time. Improve signage, interpretation and information available on site, particularly using contemporary techniques.
Ancient Thera	P	S	P	E	Enjoyed by many, however access is difficult due to topography and road. Visitors report lack of information for self-guided tours. Topographical constraints mean this will never be a mass-visit site; nor should it be, in order to keep its character and special nature of the experience.	Improve infrastructure and access, within topographical limits. Need to correct/update information on hours of operation, tickets and access. Develop engaging information for visitors, improved signage, and materials for self-guiding. Toilets need to be available and maintained.
Hiking routes	P	S		E	Several existing and well-signposted hiking routes on Santorini.	Opportunity to develop hiking routes between Santorini's key archaeological sites as 'archaeological trails'; can be incorporated with beach visits or other experiences.

Product	Target Market Appeal				Current (C)/ Aspirational (A)	General Comments
Historic events/re-enactments	P	S		E		Develop historical events, re-enactments, or short sketches with actors at key sites, to extend and enhance experience of visitors.
D. Santorini from the Sea						
Water sports and cruise activities	P	S	P	E	Existing participative water sport offerings are numerous, and generally receive positive reviews from visitors. Similarly, there are many more 'escorted' day cruises (catamarans, sailboats, snorkelling) available, and visitors report positive experiences.	Opportunities to extend water sport offerings to other parts of the island. Sunset cruises can be organised around other parts of the island, to redirect visitors away from the overcrowded areas around Oia.
Water sports events	S	S		E		Building on success of 'Santorini Experience' (in its 5th year), identify other water sports events that might be held (kitesurfing? parasailing? others)
E. Spiritual-Sensual Santorini						
Wellness Spas	P	P		E	There are limited wellness spas on Santorini (+/- 10), though well received. Mainly massage studios, and often staff travel to hotels to offer in-room treatments. There are also a few boutique hotels who offer in-house massage therapists.	Opportunities to develop luxury, full service, free-standing, independent wellness resorts for multi-use (also nutrition, exercise, yoga, etc.)
Yoga, Pilates Retreats	P	P		E	A few local boutique hotels currently offer yoga retreats; others partner with international instructions or retreat operators.	Opportunities to work with international retreat operators and develop yoga and Pilates retreats year-round, and particularly in the off-season, in partnership with local hotels, and wellness studios.
Writers, Art, Photography Retreats	P	P		E	A few writer/art/photography retreats are offered annually in Santorini by international trainers/professionals, who work with local accommodation providers to offer retreats.	Opportunities to develop further retreats year-round, and particularly in the off-season, working with leading international creative groups and specialised tour operators.

ANNEX 4

DESTINATION INSIGHTS

Annex 4: Destination Insights

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

Cruise ship controls: numbers and emissions

Issues overview

With c. 30 million passengers expected on cruise ships worldwide in 2019, cruising is growing. Europe represents the second largest cruise destination, after the Caribbean, with c. 28.4% of world cruisers versus c.34.4% in the Caribbean. Of this total, c. 17.3% cruise in the Mediterranean, which still represents the world's second largest cruise destination in its own right.

Inevitably, given the volume of cruise passengers arriving at one time, their seasonal concentration, increasing global concerns about the contribution of emissions to climate change and waste management/pollution issues, and growing concerns about 'overtourism', cruise is both a lightning rod for criticism and at risk of exacerbating the problem for destinations. Fortunately, cruise lines and the Cruise Lines Association (CLIA) have recognised this. The threat to the natural and marine environment, to destination image, and thereby to customer satisfaction and, ultimately, cruise lines' profitability, has led to a proactive approach by the cruise industry. It has embarked on a programme of environmental stewardship and destination management. This includes agreeing visitor access and management protocols with destinations and committing to the application of on-board technology to reduce environmental impact.

Visitor management

Some destinations faced with overcrowding as a result of many cruise visitors arriving over a relatively short period of time are working with cruise lines to manage flows and maintain an enjoyable visitor experience. Others have imposed a cruise passenger tax, which may have the impact of reducing passenger numbers and will probably raise revenue for the destination, but may also dissuade cruise lines from visiting.

Dubrovnik

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

Venice

Italy's transport minister has proposed a plan for diverting massive cruise ships from Venice's historic centre, with a view to rerouting a third of the vessels by 2020. The plan is to address environmental concerns about the impact of ships passing through the Venetian Lagoon and along the Giudecca Canal, by moving ships gradually away from the centrally located Marittima terminal in Venice itself to dock instead at Fusina on the Italian mainland, or at Lombardia, a privately owned terminal. A working group has been established to look at alternative solutions, including the Mayor of Venice, the Veneto Region, the Port Authority and others.

Amsterdam

In an attempt to reduce overcrowding and increase visitor value, Amsterdam introduced a cruise passenger tax in January 2019 of €8 per person per day. This resulted in two cruise lines, Cruise & Maritime Voyages (CMV) and MSC Cruises dropping the city from their itinerary and relocating to Rotterdam.

Bruges/Zeebrugge

As part of an attempt to crackdown on the growing number of day-trippers, the Belgian government has put in place regulations to cut down on the number of cruise ships docking at Bruges/Zeebrugge port from five per day to just two. A factor behind this decision is the transition in the city's retail make-up, whereby many 'everyday' shops have been replaced by shops catering purely to tourists and 'only selling chocolate and beer'. In 2018, a record 8.3 million tourists visited Bruges – an increase of 900,000 from 2017. Six million of these were cruise tourists.

Dublin

In an attempt to regulate the increasing number of cruise ships arriving in Dublin, and anticipated demands likely to be imposed as a result of Brexit, the Dublin Port Company (DPC) has announced that it plans to cut the figure by almost half from 2021. From 2021 the number of cruise ships will be restricted to 80 on 3 berths only. Currently there are 160 ships due throughout 2019 and 140 bookings have been made for 2020. This is, in part influenced by what the DPC considers the need to prioritise freight and container ships in the light of Britain's departure from the EU. Significantly, as of 2021, DPC will not take bookings for cruise turnarounds.

Barcelona and Palma de Mallorca

Although no measures have yet been taken, other European ports can be expected to implement controls on both numbers and pollution shortly.

Barcelona, Europe's busiest cruise port, expected 3.2 million cruise passengers and 830 ships in 2019. This represents almost three quarters of the city's 4.4 million visitors. Barcelona's mayor has pledged to restrict the number of cruise ships allowed to dock in the city. In 2019 11,000 residents of Palma de Mallorca, Europe's third busiest cruise port (1.75 million cruise passengers p.a.) signed a petition against the "unsustainable and undesirable" impact of cruise tourism on the city. It is not yet clear how the authorities will respond.

Sources:

https://www.theguardian.com/world/2019/aug/08/venice-cruise-ships-could-be-rerouted-from-city-centre-next-month

https://www.telegraph.co.uk/travel/cruises/news/cruise-ships-crack-down-venice-historic-centre-unesco-overtourism/

https://www.ship-technology.com/features/cities-who-banned-cruise-ships/

https://www.dublinport.ie/wp-content/uploads/2019/03/Cruise-berthing-policy-and-pricing-2021.pdf

https://www.cruiseline.co.uk/blog/amster-dammit-a-new-cruise-controversy/

https://www.cruiseindustrynews.com/cruise-news/21060-barcelona-3-2-million-cruise-guests-in-2019.html

https://avoid-crowds.com/europe-busiest-cruise-ports-in-2019/

Environmental impact control

The third annual *Global Cruise Industry Environmental Technologies and Practices Report (Sept 2019)*, compiled by CLIA, records the following commitments to cleaner, more energy-efficient and less polluting systems by CLIA member cruise lines.

CLIA Cruise Lines invested more than $22 billion in ships with new, energy-efficient technologies and cleaner fuels, including:

- **LNG Fuel:** The 2019 report found 44% of new build capacity will rely on LNG fuel for primary propulsion, a 60% increase in overall capacity compared to last year.

- **Exhaust Gas Cleaning Systems (EGCS):** More than 68% of global capacity utilises EGCS to meet or exceed air emissions requirements, representing an increase in capacity of 17% compared to last year. Additionally, 75% of non-LNG new builds will have EGCS installed, an increase in capacity of 8% compared to last year.

- **Advanced Wastewater Treatment Systems:** 100% of new ships on order are specified to have advanced wastewater treatment systems (an increase of 26% over 2018) and currently 68% of the CLIA Cruise Lines global fleet capacity is served by advanced wastewater treatment systems (an increase of 13% over 2018).

- **Shore-side Power Capability:** In port, cruise ships are increasingly equipped with the technology to allow delivery of shoreside electricity, thus allowing engines to be switched off, and there are many collaborations with ports and governments to increase the availability.

  88% of the new build capacity is either committed to be fitted with shore-side electricity systems or will be configured to add shore-side power in the future.

30% of global capacity (up 10% since 2018) are fitted to operate on shore-side electricity in the 16 ports worldwide where that capability is provided in at least one berth in the port.

An additional 18% of the current capacity is planned to be retrofitted with shore-side electricity systems, representing a more than 300% increase in capacity compared to last year.

The number of ships in the CLIA Cruise Lines fleet far outpaces the number of ports with shore-side power capacity; however, there are many collaborations with ports and governments to increase availability. Currently, 16 ports visited by CLIA Cruise Lines provide shore-side power capacity; however, not all berths at each port have the technology, and coordination with respect to using the proper berths is underdeveloped. Shore-side power availability is also limited geographically, as almost all of the capability is on the east and west coasts of North America, the port of *Kristiansand (Norway),* the Port of Hamburg (Germany), and the port of Shanghai.

- **Fleet Age:** The CLIA fleet is getting younger: The average age of the CLIA cruise lines fleet is 14.1 years compared to 14.6 the prior year.

These commitments represent welcome steps towards reducing the environmental impact of cruise ships, not just in Santorini, but worldwide. It will be important for Santorini to ensure the ships entering Santorini waters, and the caldera in particular, either already apply, or have committed to the future application of, the highest pollution control and environmental stewardship standards, as this technology improves.

While the issue of power source while awaiting passengers to board/re-board is dependent on the availability of shore-based hook-ups, which, as identified above, is relatively limited in Europe, some measures are being considered by European cruise ports:

Dubrovnik

In an attempt to reduce pollution from emissions, a proposal has been made to require moored cruise ships to draw their energy supplies from the Croatian mainland.

Sources:

https://cruising.org/news-and-research/-/media/CLIA/Research/CLIA%202019%20State%20of%20the%20Industry.pdf

https://cruising.org/news-and-research/research

Visitor management – technology solutions

Florence's open big data system

IMAGE SOURCE: HTTPS://WWW.COMUNE.FI.IT/.

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

Source:

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

Amsterdam's overcrowding in the public space monitoring system

IMAGE SOURCE: HTTPS://WWW.AMSTERDAM.NL/EN/POLICY/POLICY-TRAFFIC/.

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

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

Sources:

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

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

Triple axis model: tourism, urban planning and mobility

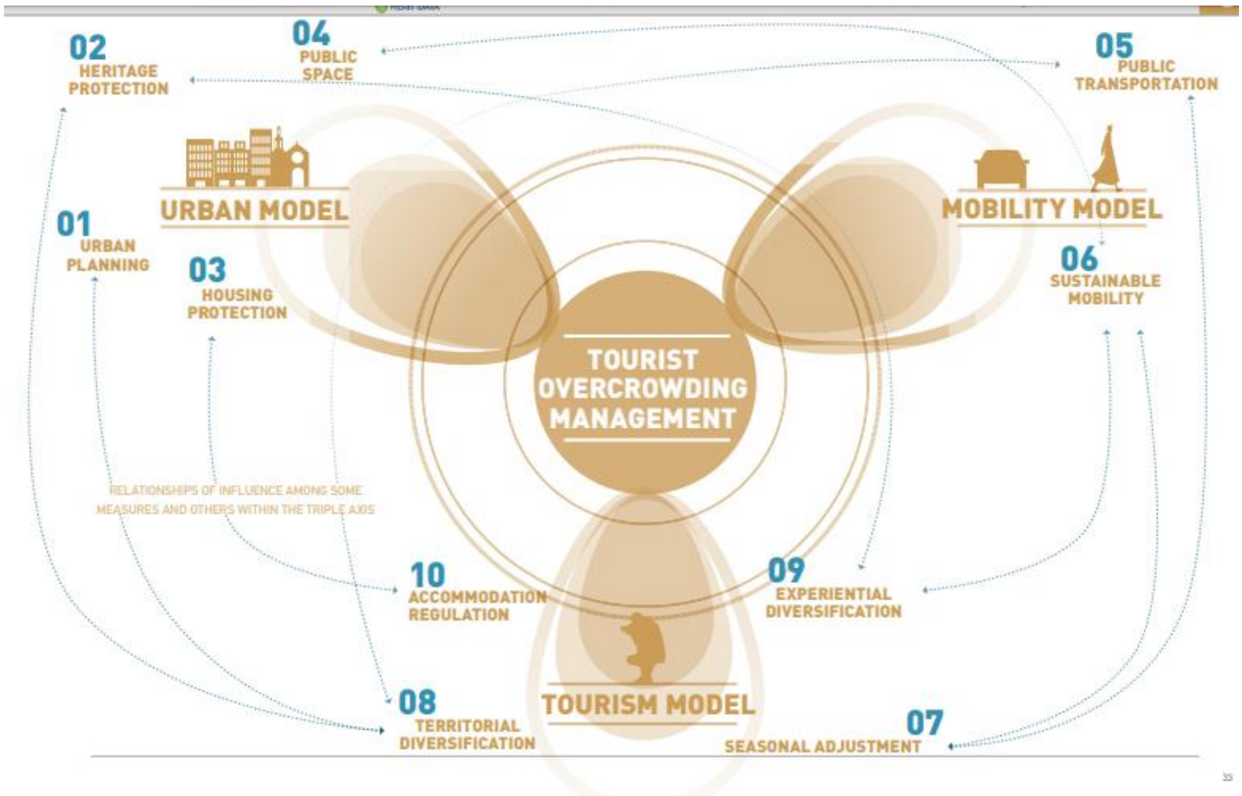

Image source: http://www.turisme.gva.es/turisme/es/files/pdf/HD_Summary_BENCHMARKING.pdf.

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

TOURIST OVERCROWDING MANAGEMENT MODEL

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

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

Sources:

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

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

Visitor management planning – spreading the benefit and the load

Japan's Dragon Route (or 'Shoryudo')

IMAGE SOURCE: HTTPS://WWW.DRAGONROUTE.NET/DRAGON_E/.

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

Sources:

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

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

Visitor management planning – restrictions, quotas, caps, timed entry and advance purchase

An increasing number of destinations, visitor sites and attractions are introducing restrictions on numbers, advance purchase, and timed entry requirements. Such restrictions are more prevalent in destinations whose natural environment is particularly fragile; but the increasing pressure from tourism is widening this management technique around the world. Some examples:

Bhutan

Since the inception of the tourism industry in 1974, Bhutan has followed a policy of "high value, low volume" tourism. Hence, it has been a highly regulated industry to ensure that the pursuit of commercial interests do not overwhelm this small country by bringing "undesirable social, economic and ecological consequences". According to this policy, the following regulations apply:

- All tours and treks must be booked through registered travel agents;
- All guided visits must be by licensed guides;
- All tourists are required to wire a fixed minimum tariff of $200 per day (January, February, June, July, August) and $250 per day (March, April, May, September, October, November) before their visit to Bhutan. This includes a Royalty payment of US$ 65 per person per day. This is inclusive of accommodation, food, guide services and transport. Bhutan claims its "High Value, Low Volume policy, which is opposite to mass market tourism, has been very successful in developing Bhutan as a niche destination for travellers worldwide especially for cultural and ecological tourism".

Lord Howe Island, Australia

400 people max permitted on land at any one time.

Lake O'Hara, Yoho National Park, British Columbia, Canada

Parks Canada has used a quota system to restrict traffic since 1970. While walkers can trek the 11 km in/out, otherwise access is restricted to a public bus service into Lake O'Hara, which determines capacity. In 2018, 17,000 people applied for the 3,300 spots available, the moment they became available online, thereby indicating both the area's popularity and vindicating the decision to impose a quota to protect both the natural environment and the visitor experience. This reflects a quota of 240-300 people a day, which includes 32 day visitors, 11 commercially guided day visitors, up to 90 campers, 48 guests at the Alpine Club of Canada run Abbott Hut and Elizabeth Parker Hut and 60 guests at Lake O'Hara Lodge.

Bermuda

Bermuda was one of the first islands to introduce a bed capacity limit of Introduced a moratorium on hotel construction in 1989, when the room capacity stood at c. 4,500 rooms/10,000 beds.

Barcelona, Spain

Barcelona introduced a moratorium on new hotel construction in 2015, which it lifted in 2019.

Sources:
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https://www.nationalcouncil.bt/assets/uploads/files/FINAL%20Tourism%20Policy%20EAC%2016th%20Session.pdf

https://www.bhutan.travel/page/frequently-asked-questions

https://www.news.com.au/travel/australian-holidays/nsw-act/lord-howe-island-is-australias-lost-paradise/news-story/7ffc3e880efc76ba2be606bab2f76711

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https://www.rmotoday.com/local-news/lake-ohara-lottery-system-recommended-1572753

https://tophotel.news/hotel-moratorium-ends-in-barcelona-first-new-property-approved-since-2015-infographic/

https://www.theguardian.com/travel/2017/aug/10/balearic-islands-caps-number-of-beds-available-for-tourists.

Visitor management - short-term rental restrictions

Short-term property rental has experienced a dramatic boom in recent years, with the most popular platform, Airbnb, offering 7 million listings in 100,000 cities worldwide. Many cities around the world have introduced limits to, and in some cases licensing of, short term rental properties. This has been driven by a concern that visitor demand, and the price they are prepared to pay, is reducing access to affordable housing for residents by pricing them out of the market and thereby distorting the domestic housing market. Some restrictions recently imposed on short-term rentals include:

Balearic Islands, Spain

In 2017, the Balearic Islands introduced restrictions in an effort to appease local residents, who had been complaining that they were being priced out of the rental market by holidaymakers. These rules banned apartment owners from renting their apartments via websites such as Airbnb and Homeaway unless they obtained a special licence to do so. Owners face fines of up to €400,000 if they break the law, and the websites face the same fine for allowing people to advertise without a valid licence number.

Palma de Mallorca, Spain

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

New York, USA

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

Amsterdam, Netherlands

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

Reykjavik, Iceland

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

San Francisco, USA

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

Berlin, Germany

Secondary residences may only be rented out for a maximum of 90 days p.a. Hosts must apply to the city for a permit to rent out an entire residence on a short-term basis.

London, UK

London imposed a 90-day limit on rental of an entire property in 2017.

Los Angeles, USA

120 days limit p.a. Hosts must register with the city for $89 every year. They may rent out only one home (their primary residence), where they spend at least six months a year.

Paris, France

Paris is one of the largest markets in the world for short-term rentals, with 65,000 Airbnb homes listed and another 35,000 on other platforms. In 2017 Paris introduced a limit of 120 days p.a. for renting out a main residence, which must be registered with the city.

Sources :

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https://www.reuters.com/article/us-airbnb-spain-palma/palma-in-spains-balearic-islands-bans-almost-all-airbnb-style-rentals-idUSKBN1HX1VX

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https://www.thelocal.fr/20190211/paris-mayor-declares-new-war-on-airbnb.

Visitor management – visitor cards

Cinque Terre Card, Italy

A string of five coastal villages in northern Italy, whose fame and beauty have resulted in significant main season congestion, Cinque Terre introduced the *Cinque Terre Card*. While not directly aimed at reducing congestion, the card bundles valuable services together for visitors and makes the visitor experience more comfortably navigable than buying each service individually. It also includes some added benefits, such as free entry to some museums and bike rental, which not all visitors will use. Revenue from sales of the card goes towards trail repairs, among other things.

The *Cinque Terre Card* includes:

- **Bus travel:** Each of the five villages has its own bus connecting the village with the nearest places of interest.
- **Entrance to the main path** connecting the Cinque Terre's villages (Blue Path) – the easiest, the most famous and the most popular path in the entire Cinque Terre. It is divided into four sections and connects all the five villages of the Cinque Terre. **Total length:** 12 km

- **Museums:** free entry to some in the Cinque Terre Park.
- **Wi-fi**
- **Toilets at stations:** free of charge. (Regular price 1 euro.)
- **Bike rental:** for 3 hours.
- **Unlimited travel by train** (at an additional cost of c. €8 extra).

The *Cinque Terre Card* can be bought:

- Online;
- At all railway stations of the Cinque Terre's villages, and at La Spezia and Levanto;
- In the beginning of every section of the Blue Path;
- At tourist information centres;
- From bus drivers, only in five villages of the Cinque Terre.

Sources:

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https://www.incinqueterre.com/en/trail-number2-blue

https://card.parconazionale5terre.it/.

https://www.bbc.co.uk/news/world-43700833.

Visitor management – revenue generation

Destinations around the world are increasingly imposing tourism taxes, bed taxes, departure taxes and various other forms of tax on visitors. While they are often portrayed as a visitor management measure, there is little evidence that a tax per head deters people from visiting. If it is high enough, it may; but few destinations seem willing to introduce such fiscally draconian measures. However, as a revenue generator, tourism taxes can increase income from visitors to the destination. In some cases taxes are hypothecated – i.e. a percentage of tax collected is reinvested in tourism-related projects and activities, after deductions for collection and administration. But, in many destinations, they are not hypothecated and contribute to the national treasury or local government finances.

Sustainable tourism tax, Palma, Majorca, Spain

Palma has attracted record numbers of tourists in recent years, putting a strain on the island's limited natural resources. In response, authorities have introduced a 'sustainable tourism tax' on accommodation charged per person per night. The tax funds environmental conservation and protection projects, research on climate change, and the development of sustainable tourism – particularly during the off season. It is expected to generate €120 million last year (€4 for stays in luxury hotels, €3 for mid-range accommodation, 2€ for cruises and cheap hotels, and €1 for campers and hostel guests).

Accessible tourism – inclusive experiences

Attracting tourists with disabilities and creating an inclusive experience, Málaga

Málaga's biggest attraction has always been – and still is – its wide range of beaches. Málaga has made it a priority to provide access to all holidaymakers and citizens alike. Today, eight of the city's beaches are fully accessible with access ramps, concrete paved walkways to the seashore, accessible changing rooms, seating areas and in some cases, support assistants to help with sea bathing and extra devices for the blind. As a part of the annual 'Enjoy the Beach' programme, the city aims to attract more tourists with disabilities and to create an inclusive experience at the beach.

Tourism-agricultural linkages and gastronomy

Tobago "Adopt-a-Farmer" Scheme

Linkages between agriculture and tourism were strengthened in Tobago by the introduction of an "Adopt-a-Farmer" scheme. This involved teaming up individual farmers with local hotels and restaurants. The hotel/restaurant would agree to buy produce from the farmer at a guaranteed price, thereby providing the farmer with a reliable source of income. This also ensured local produce was available for visitors, which added to a sustainable 'sense of place' for the island.

Source: https://books.google.co.uk/books?id=plnEYZHJ9B8C&pg=PA102&lpg=PA102&dq=tobago+adopt+a+farmer+scheme&source=bl&ots=allL3X4wdr&sig=ACfU3U1EIhxf_HfKtp_8leCpREGK9P_iOg&hl=en&sa=X&ved=2ahUKEwiGgKGqiYLlAhVkSxUIHbCIB20Q6AEwA3oECAkQAQ#v=onepage&q=tobago%20adopt%20a%20farmer%20scheme&f=false

"Taste of Arran", Scotland

A "Taste of Arran" consortium was established, initially with 11 of the island's quality food and drink producers to act as a single point of marketing, sales and distribution for locally distinctive produce from whisky and cheese to jams, chutneys, chocolates and oatcakes. This not only fulfilled a practical commercial purpose in maximising distribution of these products; it also contributed to Arran's 'sense of place' and added a distinctive edge to its marketing impact through this synergy between food and tourism aspects of the island.

Sources:

http://www.taste-of-arran.co.uk/

https://books.google.co.uk/books?id=R6auvvoIACcC&pg=PA112&lpg=PA112&dq=bermuda+hotel+building+cap+10,000&source=bl&ots=GBzebrm1o-&sig=ACfU3UoKbot8daWW82-

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The 'Bouchons Lyonnais' quality label, Lyon, France

In addition to its UNESCO heritage, Lyon also boasts exceptional intangible cultural heritage in terms of its gastronomy, particularly with its 'Bouchons Lyonnais' label. Bouchons are convivial and authentic restaurants located in Lyon, serving local gourmet dishes that perpetuate a culinary tradition inherited over many centuries and embody the art of gracious living 'à la française'. The focus in these family-owned eateries is on traditional local cuisine, friendly atmosphere and value for money.

Istria Gourmet Tourism Product Development

IMAGE SOURCE: HTTPS://WWW.ISTRA.HR/EN.

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

Source: OECD

Sustainability initiatives

'Lyon, Ville Equitable et Durable' quality label:

By creating the 'Lyon, Ville Equitable et Durable' quality label, the city mobilises all actors to make sustainable development one of their priorities. It's an initiative that's unique in France and in line with the dynamic local process aimed at promoting a social and solidarity-based economy. This label identifies the companies, shops, artisans, locations and events that are dealing with the challenges imposed by sustainable development in a pragmatic manner by encouraging responsible consumption. More than 200 entities throughout the city have now been granted this label, which makes it easier for locals and visitors alike to make more enlightened consumption choices. Lyon has also introduced another quality label – the 'Bouchons Lyonnais' – to guarantee quality and a sustainable local approach in the traditional 'Lyonnaise cuisine'.

Aruba's tourism economy based on sustainability

Image Source: https://aruba.bynder.com/m/11bdf83384a8c48f/original/Aruba-Promise-Image-Variant-6-v2.jpg.

Tourism is paramount to the economy of the island of Aruba and, with climate change posing a threat to their long-term livelihood, the Government has focused its work on developing a unique and innovative approach to safeguarding the destination. The island has become a model for other Caribbean destinations, inspiring them to become more sustainable. Aruba has heavily invested in future-proofing the island, proactively taking steps towards tackling climate change's impact on the island. The island has received various awards in recognition of its progressive sustainability efforts.

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

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

Sources:

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

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

Removal of traffic from town centres

Car Free Pontevedra

IMAGE SOURCE: HTTP://WWW.PONTEVEDRA.GAL/PUBLICACIONS/FEWER-CARS/FILES/ASSETS/COMMON/DOWNLOADS/PUBLICATION.PDF.

The Galician city of Pontevedra was in decline, polluted, with an historical centre overtaken by heavy car traffic. The city was unsafe for its residents. In 1999, the new Mayor initiated a 'urban reform', the development of a different urban space for the city, bringing back the public space to Pontevedra's residents, becoming more integrative and restoring a local feeling of pride. The urban transformation started gradually, with the pedestrianisation of the historical medieval centre. All surface car parks in the city centre were also removed and replaced by underground ones and others on the periphery. This was complemented by other congestion reduction measures (such as replacement of traffic lights by roundabouts, extension of the car-free zone, speed limit) and renovation of public infrastructures (pavements, sewage systems, public lighting and street furniture) as well as the restoration of the cultural heritage. The shift was not limited to heritage areas but it was extended to urban and municipal areas too. These measures, all financed locally with no aid from regional or central government, had a positive impact on Pontevedra and contributed to the reduction of traffic accidents and CO_2 emissions and to the development of more sustainable modes of transports such as walking and cycling. The city centre has become a more attractive and stimulating hub, with more people choosing to live in the city centre and a thriving environment for local businesses.

Sources:

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Ghent's car-free city centre

IMAGE SOURCE: HTTPS://WWW.STEPUPSMARTCITIES.EU/PORTALS/51/DOCUMENTS/GHENT%20CAR%20FREE%20CITY%20CENTRE.PDF.

In 1996, the city of Ghent in Belgium created a car-free city centre of 35 hectares as the local authority believed that, in combination with the revaluation of the city centre, it would have positive effects on the environment, liveability, economy and tourism for the city. Squares and riversides became key meeting points and the city centre became safer. Digital tools were introduced such as digital parking guides and apps to encourage slow transport. Mobility was the main focus of the car-free city centre model, encouraging and developing other types of transport (cycling, car sharing, electric boats etc.) stimulating new businesses. The car-free city centre of Ghent was heavily promoted, positioning Ghent's car-free city centre as a shopping area. The new mobility plan was introduced and dedicated communications plans were designed for retailers and residents. The mobility plan 1996 was based on an integrated approach, combining urban planning, technical and ICT infrastructure, mobility and parking, NGOs and local economy and tourism actors. The required financial investment was minimal, with only the costs of traffic signalling, but it opened up possibilities for redesigning public spaces. Results have been positive in terms of air quality, CO_2 reduction, number of pedestrians and cyclists, increase use of underground parking and increase in number of restaurants and bars in the city centre. In 2017, a new circulation plan was introduced opening up even more space for pedestrians and cyclists in the city centre.

Sources:

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

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

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

Creation and promotion of new experiences and events to high yield niche markets

Paris' Unique Experiences

IMAGE SOURCE: HTTPS://API-SITE-CDN.PARIS.FR/IMAGES/98499.

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

- **Strengthening assets** – Improve welcome services at the Eiffel Tower, renovate the Arc de Triomphe and Parisian places of culture and worship, and improve the lighting in Paris, redevelop and organise new activities on the Champs-Elysées; create Parisian seasons, translate and distribute the Parisian cultural programme internationally; develop 'savoir-faire' tourism, create a 'made in Paris' label, and provide support for shopkeepers and artisans; create showcase spaces for Parisian gastronomy; modernise the infrastructure for hosting business events and implement proactive approaches to welcoming large conferences and trade shows.

- **Reinforcing emerging sectors** – Implement an ambitious international promotion plan for Parisian nights; structure the LBGT tourism offer; develop urban tourism; host a major international event at least once a year; redevelop the banks of the Seine, launch the 'Reinventing the Seine' call for projects, develop swimming and nautical activities.

- **Developing new offers** – Open the abandoned railway, La Petite Ceinture, create urban farms, festivals and entertainment in the forests and gardens, develop 'sustainable Paris' walk; create tourism routes on the history and memory of Paris, improve the quality of visits to Père Lachaise cemetery; create events during the off-peaks periods to guarantee experiences year round.

- **Revealing new territories** – Create district brands; develop tourism offer in the Greater Paris area.

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

New Zealand's targeting of the premium sector

IMAGE SOURCE: HTTPS://WWW.TOURISMNEWZEALAND.COM/MEDIA/3426/PREMIUM-INFOGRAPHICS.PDF.

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

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

Source:

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

Extending the season

Dubrovnik's out-of-season events development

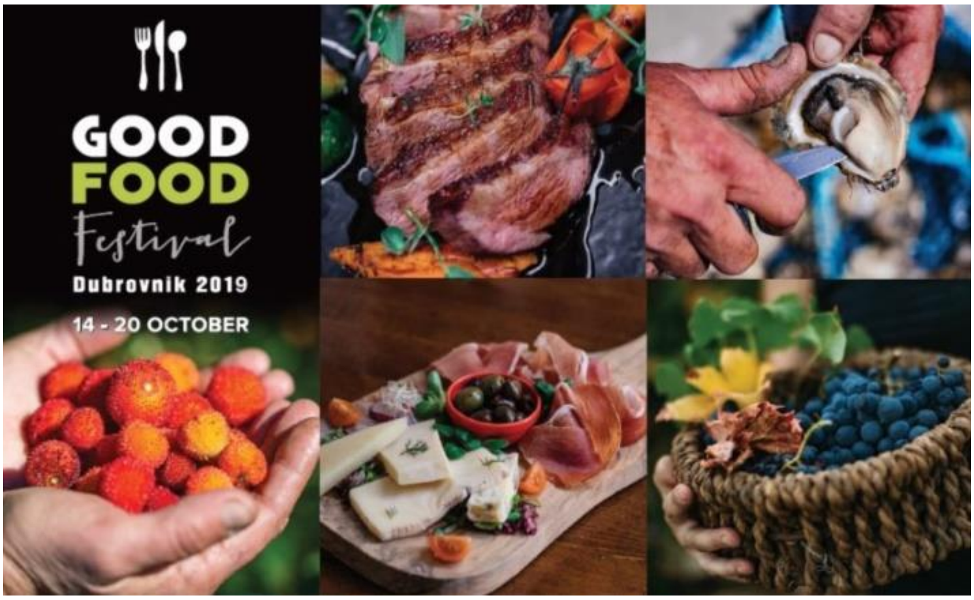

IMAGE SOURCE: TTP://WWW.TZDUBROVNIK.HR/LANG/EN/GET/GOOD_FOOD_FEST/62522/GOOD_FOOD_FESTIVAL_2019.HTML.

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

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

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

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

Brussels 'Winter & Summer in Brussels' campaigns

IMAGE SOURCE: HTTPS://VISIT.BRUSSELS/EN/ARTICLE/SUMMER-BRUSSELS-BREATH-IN-THE-CITYS-MANY-PERFUMES-THIS-SUMMER-IN-BRUSSELS.

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

& Marketing department, while the cultural content of the campaigns will be provided by the Product Development department of visit.brussels.

Source:

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

'Half Price Poznań', Poland

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

Premium quality, with exclusive image, in all respects

Visit Flanders focusing on cultural travellers

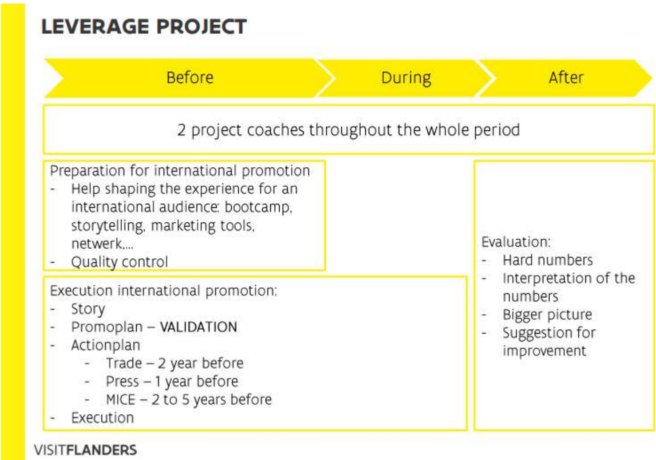

IMAGE SOURCE: HTTPS://WWW.TOERISMEVLAANDEREN.BE/SITES/TOERISMEVLAANDEREN.BE/FILES/INTERNATIONALEPROMOTIE%20-%20KATRIEN%20DEJONGHE.PDF.

In its 2016-2020 Strategy, VisitFlanders (the DMO for the region of Flanders in Belgium) highlighted its objectives which are: to increase the economic impact of tourism in Flanders; extend the reputation of Flanders as a quality tourist destination; and raise the participation of Flemish people in tourism. Consequently, VisitFlanders decided to focus on valuable segments and chose the cultural traveller. Cultural travellers can be motivated by different types of cultural experiences such as heritage experience, art experience and local culture experience. In the last five years, VisitFlanders has invested 72 million euros in specific experiences through large leverage projects that match their chosen target segments. VisitFlanders validates quality projects with good business plan, full support of project coaches, potential for international promotion and experiences executed to a high quality with multilingual support. VisitFlanders provides project support for the all duration of a leverage project, from trade activation two years before opening to the project evaluation and suggestions for improvement.

Sources:

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

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

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

Strengthened engagement of village communities in tourism

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

IMAGE SOURCE: HTTPS://S3-EU-WEST-1.AMAZONAWS.COM/TRAVELFOUNDATION/WP-CONTENT/UPLOADS/2018/09/21110258/CASE-STUDY-DOWNLOAD-CROATIA.PDF.

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

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

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

Traditional handicrafts and events, Tallinn, Estonia

The Estonian Folk Art and Craft Union was founded in 1929 and is a non-profit organisation that connects regional folk art, craft organisations and craftspeople. It aims to value, preserve, and develop Estonian handicraft traditions and to treasure their regional characteristics. The Union represents craftspeople and folk organisations in Estonia and abroad, holds important handicraft events in Estonia and issues the label ´Certified Estonian Artisanal Craft´. They also offer craft making courses in woodblock printing, national beaded necklaces and cotton fabric necklaces. In cooperation with www.Visittallinn.ee, a map introducing Estonian handicraft is published in four languages. The map is available for downloading and handed out at tourist information centers and through other marketing channels. www.Visittallinn.ee includes articles introducing local handicraft and shops selling it.

Enhanced access to cultural and natural heritage and character

Dubrovnik Site refurbishment project with Lazareti Creative Hub of Dubrovnik

IMAGE SOURCE: HTTPS://WWW.LAZARETIHUB.COM/EN/ABOUT-PROJECT.

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

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

Market insights and 'big data' collection

Tourism Observatory of the City of Buenos Aires

Source: Tourism Observatory of the City of Buenos Aires website, available at https://turismo.buenosaires.gob.ar/es/observatorio

The Tourism Observatory of the City of Buenos Aires is a General Direction within the Buenos Aires Tourism Board, under the direct supervision of the President of the Buenos Aires Tourism Board. The Buenos Aires Tourism Board reports to the General Secretary of International Affairs, under the direct supervision of the Mayor of Buenos Aires, who is the Head of the government of the city.

The mission of the Buenos Aires Tourism Observatory is to gather data and generate key information to guide the private and public sectors' decision making process and to become global leaders in the production of strategic knowledge using 'big data' and innovative research methods, thus strengthening tourism governance and taking effective data-driven decisions in an ever-changing and competitive market. It is part of the UNWTO International Network of Sustainable Tourism Observatories and furthermore analyses aspects such as visits per day, average spending, most visited neighborhoods, competition in the hospitality sector, etc.

https://turismo.buenosaires.gob.ar/es/observatorio further insights into destination management planning at

destinationmanagementplan.gr

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