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Greece: COVID-19 Tourism Recovery Technical Assistance Cooperation Package – Facilitating Tourism Recovery in Aftermath of COVID-19

Activity

Update the Tourism Marketing Strategy to respond to the COVID-19 Tourism Impact

Deliverable

Adaptation of the National Tourism Marketing Strategy in light of the COVID-19 Tourism Impact

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All partners involved hope that this report will shed new light onto how the Tourism Marketing Strategy of Greece can be adapted to accelerate the recovery of the country from the impact of COVID-19. The findings aim to inform policymakers on the latest trends and guide their decisions and marketing initiatives in 2022 and 2023.

Disclaimer

INTRODUCTION

This report is the **proposed adaptation of the National Tourism Marketing Strategy for 2022-23 to the effects of COVID-19** for Greece to respond as effectively as possible to the circumstances of the pandemic.

The Action Plan outlined **proposes targeted added value actions which are implementable in 2022-23**. Furthermore, the plan has the potential to act as an extension of the broader tourism marketing design already elaborated and implemented by the stakeholders, which is why it **concerns only specific tourist products.**

The report is part of the technical assistance provided by the World Tourism Organisation and the European Bank for Reconstruction and Development to the Greek Ministry of Tourism.

At a time of ongoing great uncertainty**, strategies with a short-term horizon are considered to be more relevant and applicable**. In any case, having an **agile approach** is key which is why during the preparation of the project, individual deliverables were communicated to the project partners for evaluation and timely integration in the design of the tourism marketing strategy (or individual actions).

Editor's note: *it should be pointed out that this report does not take into account the new circumstances arising as a result of the developments in the Black Sea region and the great increase in energy prices. Nevertheless, the proposed actions are primarily aimed at contributing to further strengthening the resilience of Greek Tourism in the face of any form of crisis.*

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ABBREVIATIONS

AIA: Athens International Airport

BoG: Bank of Greece

DMMO: Destination Management and Marketing Organisation

EBRD: European Bank for Reconstruction and Development

ETC: European Travel Commission

GNTO: Greek National Tourism Organization

INSETE: Institute of the Greek Tourism Confederation

LGO: Local Government Organisation

MICE: Meetings, Incentives, Conferences and Events

RIT: Research Institute for Tourism

WTTC: World Travel and Tourism Council

UNWTO: World Tourism Organization

EXECUTIVE SUMMARY

In 2020, the entire world stood still. Due to the fast spread of the COVID-19 virus and the subsequent pandemic, **by April and May 2020 more than 150 destinations worldwide closed their borders, bringing international travel to nearly a complete stop**. While some of these restrictions were eased and altered over time, by the end of 2020, over half of the world's destinations were still imposing partial closure. As a result, **international tourist arrivals to Europe dropped by 68% in 2020 and by 62% in 2021, compared to 2019 levels** (United Nations World Tourism Organization/ UNWTO, 2022).

However, 2021 saw the beginning of a much-needed recovery. After recording a 86% and 81% drop in tourist arrivals in Q1 and Q2, respectively, **European summer saw a relative improvement with a 53% decline in Q3 2021 - all compared to 2019** (European Travel Commission/ ETC, 2022).

The pandemic speeded up many existing trends but triggered a relatively new one: **the utmost attention to personal health and safety**. At the same time, **digitization**, **work from anywhere** as well as **purposeful travel** are now more than ever prevalent.

With the introduction of the COVID-19 vaccine as well as the extensive vaccination roll out programmes all over Europe led to a **very positive sentiment for travel in 2021, especially for domestic and Intra-European trips**. During 2021, people **travelled less often, spent more, and stayed longer at a single destination** (ETC, 2022).

In 2021, Greece recorded the **second lower decline (other than France) in tourist arrivals among top European destinations (-54%)** compared to 2019 levels showing very strong resilience (ETC, 2022). According to the Bank of Greece, during January-November 2021 **tourism receipts increased by 6,193 million euros** (+144%) compared to 2020 and reached 10,477 million euros. The specific increase was due to **the growth of both international tourism arrivals** by 96.8% and **average spend per trip** by 22.6% both compared to 2020 levels. Also, according to Athens International Airport data, the percentage of Europeans making a trip of 2 weeks or more in 2021, doubled in relation to 2019.

At the same time, Greece was – according to various sources - among **the top 5 European destinations in respect to popularity and positive sentiment**, showing a very strong brand, built around the **effective management of the pandemic, since its start**[1]**,**

Regarding brand positioning and sentiment, expectedly **Greece is ranked top of mind when it comes to relaxation as well as sun and sea holidays.** However, it **lacks popularity for city break trips** as well as **nature activities** (compared to other European destinations), the latter being a sought-after experience by travellers especially during the pandemic.

When it comes to the Greek tourism product, the country did not show only resilience but succeeded **to grow its product satisfaction** among travellers compared to the pre-pandemic levels, in all sub-product categories (i.e. sunbathing, gastronomy, arts and culture).

[1] European Travel Commission, United States Tour Operators Association,INSETE

Greece's **main competitors performed relatively well**, especially Croatia and Portugal while Spain and Italy (more impacted at the 1st stages of the pandemic) continue to be the two most desired European destinations[2].

For 2022, **quarantine is still the main concern in taking a trip** while **flexible cancellation policies** are now the main confidence booster for trips, showcasing a persisting uncertainty (ETC, 2022). However, this has mainly to do with financial commitments rather than the actual intent of consumers to take a trip which seems now higher than ever since COVID-19 broke out, in March 2020 (ETC, 2022).

Admittedly, **Greece has further untapped potential as a tourism destination** and still plenty of room to upgrade its marketing efforts and cope with the changes brought by the pandemic.

Three main pillars are introduced to guide the Tourism Marketing Strategy in 2022 and 2023:

(a) research and intelligence - there is a great need for **timely, real time and publicly available data with a forward-looking perspective,** especially through:

1. Social listening among its main target markets as a tourism destination.
2. Monitoring the travel sentiment as well as behaviours, attitudes, and concerns to taking a trip to Greece and its comp set.
3. Learning more through dedicated research about added value audience segments, such SE European markets, digital nomads as well as solo travellers.
4. Evaluating further the travel experiences at main international gateways.
5. Drafting and communicating outlook reports to the entire sector and stakeholders engaged, including micro-, small-, and medium-business (MSMEs).
6. Setting up a Power Business Intelligence (Power BI) system for the sector to take smarter decisions.

(b) the tourism product and visitor experience - **capitalizing the trends induced by the pandemic and developing products for specific segments is highly recommended** through:

1. Digitalizing all ticketing and check-in and out procedures for passenger shipping.
2. Upgrading the visitor experience through the integration of augmented reality, especially for open space culture and heritage sites and attractions.
3. Implementing and communicating demonstration projects around the concept of circular economy.
4. Building branded routes for road tripping experiences.
5. Addressing long lasting and persisting structural constraints associated with the most heavily battered tourism product, that of MICE.
6. Developing a "Greek Signature Experience" programme for nature and outdoors.

(c) communication - attracting **audience segments with high added value as well as dispersing tourism flows in space and time** is of the essence:

[2] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Waves 1-9

1. Developing a dedicated campaign and Ambassador program for Greek diaspora (and non-Greek Friends).
2. Developing a dedicated campaign for solo travellers.
3. Communicating sun and sea experience in mainland Greece.
4. Revamping the communication of city-break (shorter-stay) trips through monitoring and reducing travellers' carbon footprint.
5. Promoting key tourism products (branded road trips and signature experiences) to niche audiences.

1. THE PANDEMIC TRANSFORMS INTERNATIONAL TRAVEL TRENDS

1.1. DEMAND FOR TRAVEL MAKES A DYNAMIC COME-BACK

Vaccinations, simplification of travel regulations as well as the fact that consumers are getting used to travelling in the midst of a pandemic have led to an **increase in demand for travel**. The World Tourism Organisation notes that in the first month of 2022 there was a 130% increase in global arrivals compared to January 2021. Note that this increase corresponds to the overall increase in global arrivals in 2021 compared to 2020[3]. According to Expedia[4] (2021), the monthly volume of searches internationally continued to increase in the second half of 2021, and now records a quarterly increase of more than 70%. During Q1 2021, **large online search increases were associated with positive announcements/ publicity regarding vaccines** made by their manufacturers. According to the same report, **72% of consumers worldwide intend to take a trip in the next 12 months**, while **2 out of 3 Europeans intend to travel by March 2022**[5] (European Travel Commission/ ETC, 2021). Meanwhile, it is estimated that **travel expenditure will continue to be overall higher than** pre-pandemic years, at least in the short term: to illustrate, consumers from the US are willing to spend more money (13%) for nicer accommodations (28%) and for longer periods of time (24%) on future travel[6] (Price Waterhouse Coopers/ PwC, 2021). According to Hilton[7] (2021), **49% of American consumers said they used the pandemic as an opportunity to save money to take their dream trip**, while **36% of interviewees would prefer more vacation days to take their dream vacation, rather than getting a salary increase**[8] (Expedia, 2021).

1.2. NOTHING MORE IMPORTANT THAN STRICT HEALTH AND SAFETY RULES

Despite the great willingness to travel, **sentiment remains fragile**: to illustrate, 85% of American consumers were concerned that vaccines would not be effective against variants (PWC, 2021), and 89% are now more conscious of germs and diseases than in the pre-pandemic period[9] (Oliver Wyman, 2020). Similarly, according to the European Travel Commission (2021), **63% of European travellers feel safer and more confident to enjoy their holidays when strict health and safety protocols are observed**. This percentage increases significantly among cruise and culture-related travellers (71% and 70%, respectively). According to the same report, **air travel continues to cause the greatest concern to Europeans in terms of their personal health** (18.3%). This is why **more and more travellers are**

[3] UNWTO, World Tourism Barometer, March 2022
[4] Travel Recovery Trend Report, 2021 I Q2 (Expedia Group, 2021)
[5] Monitoring Sentiment for Intra-European Travel – wave 9 (European Travel Commission, 2021)
[6] Bring your shades. The future looks bright; 5 travel trends to track (PWC, 2021)
[7] The 2022 traveler: emerging trends and the redefined traveler (Hilton, 2021).
[8] Traveler Value Index, 2021 I Q1 (Expedia Group, 2021)
[9] To recovery and beyond; the future of Travel and Tourism in the wake of COVID-19 (Oliver Wyman – WTTC, 2020)

choosing airlines with higher safety scores, reaching an average of 4.8/5 (January 2021) compared to 4.2/5 during the summer of 2020[10] (Skyscanner, 2021).

1.3. TRANSPARENCY, CONFIDENCE AND FLEXIBILITY CONTINUE TO BE OF CONCERN

The constant change in travel regulations and travel restrictions due to the evolution of the pandemic, as well as the fear of quarantine, were the main concern for consumers that kept them away from travel throughout 2020-21. **Now with flexible booking policies in place, consumers are ready to book their next trip**: 56% of respondents said they have such a desire to travel that they are willing to book a trip even if they might have to cancel in the future[11] (American Express Travel, 2021). **In addition to continuing vaccinations (15.4%), consumer credit for travel in the European market is strengthened by flexible cancellation policies (12.2%)** (ETC, 2021). According to Expedia (2021), 1 in 4 travellers say that it is very important to be able to get full refunds for all travel experiences (accommodation, air travel, car rental, cruise).

1.4. INTERNATIONAL DESTINATIONS REGAIN LOST GROUND

In early 2021 there was a strong desire for domestic travel. In the first week of January 2021, nearly 70% of hotel clickers on TripAdvisor were booking domestic trips between May and August. Globally, 3 out of 4 travellers (from USA, Great Britain, Australia, Italy, Singapore and Japan) responded that they plan to take at least one such trip in 2021[12] (TripAdvisor, 2021). Nevertheless, a recent ETC survey among European travellers showed that **the desire for domestic travel is declining significantly at least until the end of March 2022**, a trend that is expected to continue throughout the summer of 2022: 31.5 % of respondents said they would travel within their own country (a 10% drop compared to a similar survey two months earlier). **55.3% will prefer another European country and 10.4% intend to travel outside Europe**. Nevertheless, Europe is still not an attractive tourist destination for long haul markets (such as the US, Canada, China and Japan) according to the European Travel Commission[13] (2021).

1.5. GUESTS ARE LOOKING FOR DEEP EMOTIONS

Although the level of desire and familiarity with travel during a pandemic varies with age and nationality, according to American Express almost **9 out of 10 consumers worldwide say that having planned a future trip makes them have something to positively look forward to,** to anticipate (63%),

[10] The Return of Travel (Skyscanner horizons, 2021)
[11] Global Travel Trends Report (American Express Travel, 2021)
[12] 2021: The Year of the Travel Rebound; 5 traveler trends to watch out for 2021 (TripAdvisor, 2021)

[13] Long Haul Travel Barometer, 3/2021 (European Travel Commission)

to feel happy (53%) and to feel optimistic (53%) about. According to a similar survey by the European Travel Commission, what European travellers have missed the most is enjoying life in a **relaxing environment** (16.4%), **escaping from routine** and everyday life (16.2%), spending **quality time with family or friends** (14%), creating **new lasting memories** (12.5%), and finally **living the local life and immersing in the local culture** in the places they will visit (9.9%)[14].

1.6. NEW PLACES AND NEW FACES

The pandemic has forced us to focus on people, situations and things with real value and importance in our lives. **72% of adults from Great Britain said that the pandemic forced them to redefine what is important to them** (Hilton, 2021). 2022 will, most likely, be the year when **travellers will want to get to know new places and create new, interpersonal relationships**: 60% of travellers worldwide wish to experience new cultures, customs and traditions in places they have not visited before and the same percentage is eager to meet new people while on vacation[15] (Booking.com, 2021). Also, according to the same report, 58% of consumers worldwide say they enjoy learning and discovering new journeys and unfamiliar transportation systems when travelling. The above are on the flipside of the more traditional choices made in 2020 (a year when confidence and familiarity played an even greater role): according to the Association of British Travel Agents (ABTA, 2020), 32% of British travellers said they would be likely to visit a country they had never been to before (down from 45% last year) and 41% said they're likely to visit a new resort or city (from 54% in 2019)[16]. **1 in 3 European travellers even stated that they would pay more to visit a less popular and less busy destination because of the pandemic** (ETC, 2021)[17] with Poles, Britons and Germans more likely to avoid crowds.

1.7. THE SUN AND THE SEA WARM THE MOOD

"Sun and Sea" holidays are traditionally the most popular type of holiday. More than 1 in 3 European travellers stated in July 2021 that they will be vacationing at a seaside destination (ETC, 2021) while according to Booking.com, for 2022, **77% of travellers worldwide said that the mere feeling of the sun on their skin will improve their mood**. Similarly, Skyscanner confirms **travellers' preference for destinations with beaches, sun, sea and outdoors** such as Mauritius, Zakynthos, Minorca, Lanzarote, Corfu and Zanzibar (Skyscanner, 2021).

[14] Monitoring Sentiment for Intra-European Travel – wave 8 (European Travel Commission, 2021)
[15] Travel predictions 2022 (Booking.com, 2021)
[16] Six trends for travel in 2021 (ABTA, 2020)
[17] Europeans' attitudes towards responsible travel choices (European Travel Commission, 2021)

1.8. TRAVEL IS GOOD FOR YOUR HEALTH

The pandemic has brought about major changes and adverse – mental and physical – health effects for the entire world population. As we return to the "new normal", the need to restore health and the goal for personal wellness are considered particularly important. **79% of travellers agree that travel helps their mental and emotional wellbeing more than other forms of self-care** (Booking.com, 2021) while a similar percentage (78%) wants **to travel in order to relax from the great stress experienced** in 2020 (American Express Travel, 2021). In particular, **11% of European travellers say that, for early 2022, they will opt for a trip specifically for "wellness and relaxation"** (ETC, 2021).

1.9. REMOTE WORKING IS NO LONGER FOR THE SELECTED FEW

The new normal from 2020 onwards brings about further disruption to work models, given that for a considerable period, many organisations worldwide were forced to operate with remote working. This flexibility, combined with specialized services and discounts for long-term stays, **have led destinations** such as Barbados, Miami and recently Greece to **develop communication campaigns and incentives inviting both remote workers and digital nomads**. Meanwhile, as the restrictions on movement fluctuate due to vaccines, the debate on the future of work becomes more and more complicated. On the one hand, **employees want remote work to be part of the new normal** with 33% of travellers saying that they plan to work from home for 1-5 more days a week post COVID-19 (Oliver Wyman, 2020) and 54% of consumers stating that **the freedom and flexibility of being able to live and work while travelling the world is more attractive** now than before the pandemic (American Express, 2021). On the other hand, **employers appear more hesitant** with just 37% of CEOs saying that they are looking to have most employees working remotely at least two days a week[18] (KPGM, 2021). In the shadow of the "Great Resignation", it is estimated that more and more organisations will adopt more flexible work policies in the coming years. Meanwhile, these changes have also affected the **"rise" of digital nomads** – those who choose to live and work while travelling the world. According to a recent study, the population of American digital nomads **increased by 49% in** 2020[19]. Digital nomads are highly educated and have digital skills, and **prefer destinations with low cost of living** that allow them to travel more.

1.10. NEED FOR VACATION… AND ONLY VACATION

When the pandemic broke out, remote work became a reality and the separation between home, workplace and vacation location was indistinguishable. However, in 2022 there is likely to be a significant increase in the number of people who want to restore work-life balance as **73% of**

[18] Global Assignment Policies and Practices Survey (KPMG, 2021)
[19] COVID-19 and the Rise of the Digital Nomad (MBO Partners, 2020)

international travellers state emphatically that their vacation time will be strictly work-free in the future (Booking.com, 2021).

1.11. THE "JOURNEY" IS AS VALUABLE AS THE DESTINATION

With the virtual halt on all travel for a whole year (2020-21), travellers are keen to return to their favourite activity and now consider the journey as an integral part of the tourist experience. **3 out of 4 international travellers find that the journey to a destination is more enjoyable when it feels like part of the trip itself** (Booking.com, 2021). Nevertheless, most Europeans (58%) want to stay longer in the destination they have chosen for their travel, and travel less frequently because of the pandemic (Booking, 2021).

1.12. TOURISM GETS A PURPOSE

The pandemic seems to have been the catalyst to make travel more responsible: Indicatively for the English market, **twice as many consumers state that they are more likely to choose a travel company based on its environmental performance** (38% in 2020 compared to 19% in 2011). With the growing awareness of responsible travel among guests, the top-3 practices that guests globally require to make their trips more responsible are: (1) **easy identification of eco-labels**, (2) **limited use of single-use plastics** and (3) **financial incentives for accommodation providers** to improve energy efficiency. Establishing more protected areas to limit tourist numbers and removal of single-use bathroom amenities round out the top five global measures[20] (Agoda, 2021). This trend also affects business travel as **31% of travel managers in the US said that they have a stated commitment to reduce emissions by a certain amount within a specific time frame[21]** (Deloitte, 2021).

1.13. PRIORITY TO THE COMMUNITY

The pandemic seems to have strengthened **consumers' willingness to contribute to the local communities that welcome them when they travel**. According to American Express, 77% of consumers from 7 major markets (USA, Australia, Canada, India, Japan, Great Britain, and Mexico) agree that they want to be more aware and support small, local businesses when they travel. Furthermore, more than **1 in 3 European travellers (36.4%) say that they are willing to pay more to support local communities in the destinations they visit** (ETC, 2021).

[20] Agoda Sustainable Travel Trends Survey 2021

[21] Return to a world transformed; how the pandemic is reshaping corporate travel (Deloitte, 2021)

1.14. BUSINESS TRAVEL WILL NEVER BE THE SAME

Business travel and MICE are the market segment with the slowest recovery rate. A Deloitte US Survey (2021) among 150 travel managers and business executives at companies whose 2019 air spend averaged US$123 million showed the following:

- In Q2 2021, fewer than 1 in 5 businesses reached 25% of the 2019 quarterly travel spend.
- By the end of Q4 2022, almost 1 in 2 **say they will not have reached the 2019 spend but almost 9 out of 10 are projected to reach 75% or higher**.
- **The lifting of travel restrictions and especially quarantine** is cited as very important to the resumption of business travel, which is also confirmed by the relevant ETC (2021) survey regarding the factors causing concern for European travellers.

The World Travel and Tourism Council (WTTC) projects that as the virus becomes endemic, **it is likely that business travel recovery will vary by region, country, and industry, with manufacturing, pharmaceuticals and construction** being early adopters of a return to business travel[22]. As organisations weigh health risks with the cost of not having business travel for some time, circumstances where **physical presence is necessary will be the key factor that will determine how quickly business travel will resume**. Confidential agreements, certification, and inspection procedures as well as sales agreements are reasons that increase the necessity of business travel. On the other hand, conferences, training seminars and "corporate retreats" are expected to recover more slowly as they are not considered urgent and can now be held online (hybrid events). Meanwhile, it is estimated that **regional business travel** will recover first, where participants can travel by car.

1.15. TECHNOLOGY INSPIRES CONFIDENCE

The **role of technology in strengthening the climate of confidence is indisputable**: according to a survey by Amadeus (2020) on a sample of 6,000 travellers from France, Germany, Great Britain, India, Singapore, and the US, more than 4 in 5 respondents (84%) said **that technology would increase their confidence to travel in the next 12 months by addressing concerns around mixing with crowds, social distancing and physical touchpoints**. Meanwhile, 76% of international travellers say that their preferred tourist destinations will have **airports with reliable, contactless experience in terms of identification and entry** (Hilton, 2021). In particular, as constant changes in travel regulations create great uncertainty in one's intention to travel, 42% of respondents to the Amadeus survey stated that **mobile applications that provide on-trip notifications to inform about localized outbreaks and changes to government guidance would help boost their confidence to travel**[23] (Amadeus, 2020).

[22] Adapting To Endemic COVID-19: The Outlook For Business Travel (WTTC, 2021)
[23] New consumer research reveals how technology can boost traveler confidence and accelerate demand (Amadeus, 2020)

2. SPECIFIC INSIGHTS THROUGH PRIMARY RESEARCH AND DATA ANALYTICS

This section presents the conclusions of 3 main data sources as they emerged from a specialized analysis, exclusively for the needs of this project.

Specifically, the following were used:

- Primary data as derived from the European Travel Commission survey on monitoring the sentiment for intra-European travel (September 2020 – December 2021).
- Data from AIA's passenger survey, between 2019 and 2021.
- Specialized online survey conducted on 17/1/2022 on 500 Greek travellers (with at least 2 international or domestic trips) between 2019-2021 in relation to their intentions, preferences and concerns in the midst of the pandemic.

The description and extensive analysis of the information and data are presented in the relevant Annexes.

2.1. RELAXING ON THE BEACH DOMINATES, BUT AN AUTHENTIC EXPERIENCE IS NOT TAKEN FOR GRANTED | EUROPEAN TRAVEL COMMISSION

This section presents **an analysis of information and data from the European Travel Commission's rolling survey on assessing the sentiment for intra-European travel** from 10 major European countries.

In particular, the information presented concerns major inbound tourism markets for Greece (Great Britain, Italy, Austria, France, Germany, Poland, and the Netherlands), and two main population groups:

- Europeans most likely to travel in the next six months and,
- Europeans most likely to travel in the next six months, specifically to Greece.

The following information presented relates to

- What are their travel interests/ which 'type' of traveller they identify themselves as.
- What type of leisure trip are they planning.
- What is the desire/experience and/or the feeling they have missed most from travelling and are looking forward to experiencing again.
- Who will they be traveling with.

Information is taken from waves 7 and 9 of the ETC research and relates to travel during: June – October as well as October – March, i.e. it covers almost an entire year between 2020 and 2021.

The aim of the analysis is to identify in which sectors and market segments Greece has a comparatively good positioning and in which it lags and therefore there are opportunities for improvement, with at least two key conditions, that:

- Visitors are positive about the relevant existing tourist product (in this context information and data from social listening will be used).
- Relevant strategic targeting is in place and product development and/or communication budget is available.

Note that because of the small sample sizes for Greece, this information is mainly used to formulate qualitative conclusions and directions.

In terms of attracting <u>travellers according to their interests</u>:

1. As expected, Greece seems to **attract mainly of those travellers who prefer to have fun and relax on the beach**.
2. But as regards visitors who identify themselves **as explorers, looking for immersive, unique and local experiences, the picture is fragmented**. On the one hand, Greece is at a very good level for many markets such as Germany, Italy, and Austria. On the other hand, it falls short of how authentic it is perceived as a destination by British travellers (especially during their summer holidays), French travellers (during the winter holiday season) and generally by travellers from Poland and The Netherlands.
3. Similarly, **a fragmented picture can be observed among visitors who are excited to visit city destinations**: for most markets, Greece is considered to be a recognisable destination for city break holidays, except for Austria, Germany and the Netherlands.

In terms of <u>tourist products</u>:

1. As expected, Greece seems to be **very well positioned among all markets in terms of Sun and Sea holidays**, in combination with both funand, relaxation and calm. This preference seems not to be strongly affected by the timing of the trip, that is, while travellers' preferences change depending on the time period, and their perception of Greece as a tourist destination does not change.
2. On the contrary, Greece is estimated **to fall significantly short in terms of its positioning as a city break destination** during both summer and winter holiday periods in all markets of this survey.
3. **The same applies to holidays in nature and outdoors**, especially during the winter when the willingness for such holidays is higher, and in particular to travellers from Great Britain, Italy, Austria, and The Netherlands.

4. What is particularly interesting is the fact that when it comes to travelling for the purpose of **wellness and relaxation**, British and Dutch travellers who say that they will choose Greece for their next trip, position it higher than the general sample, unlike citizens of other countries.

In terms of <u>travel companion</u> (i.e. with whom to travel), it is consistently observed in all geographic markets under analysis that **Greece attracts significantly fewer individual (solo) travellers**.

Finally, it is worth noting that **Greece is recognised as a destination of calm and relaxation**, which is quite important during a pandemic since this is what European travellers are primarily looking for.

2.2. LONGER TRAVEL DURATION FOR MOST EUROPEANS | ATHENS INTERNATIONAL AIRPORT (AIA) PASSENGER SURVEY

A primary data study in the framework of AIA's Passenger Survey (with Greece as the final destination) initially shows that there is a **decline in confidence to travel in the midst of the pandemic, between 2021 and 2020**.

In particular, for **<u>residents of Europe</u>**:

Table 1 Confidence to travel by residents of Europe

Confidence to travel due to COVID-19	Jan-Nov 2021	2020
1=very low	0%	0%
_2	0%	2%
_3	44%	26%
_4	37%	40%
5=very high	18%	32%

This is probably because **the percentage of travellers travelling less frequently ("light travellers")** increased exponentially and therefore are likely to be less familiar with travelling in the midst of a pandemic, as shown below:

Table 2 Percentage of visitors by travel frequency

Traveller type	Jan-Nov 2021	2020
Heavy travellers (10+ times / year)	1%	6%
Light travellers (up to twice / year)	50%	17%
Medium travellers (3-9 times / year)	49%	77%

In any case, there is an **increased confidence in air travel**:

Table 3 Confidence in air travel and related decisions

Air Travel Decision	Jan-Nov 2021	2020
I have confidence in airport/ carrier protection measures	42%	26%
I take all precautionary personal protection measures	44%	51%
It was essential for me to travel	1%	1%
I'm not worried about COVID-19	2%	4%
Limited travel time	11%	17%

In general, and from the analysis of the individual geographic markets for which data is available (Great Britain, Germany, France, Greece, USA/ Canada, Nordic countries), the following preliminary conclusions can also be drawn:

- **The highest confidence to travel during a pandemic was shown by the residents of Great Britain** (61%), **Germany and the Nordic countries** (57% and 56% respectively).
- In contrast, residents of France, Greece and travellers from the US/ Canada show a lower level of confidence: 50%, 46% and 41%, respectively.

Concerning confidence in protection measures taken by the airport/ carrier:

- **The residents of the Nordic countries, Great Britain, and Germany seem to have the highest percentages**: 49%, 43% and 40%, respectively.
- In contrast, travellers from France, Greece and the US/ Canada have a slightly lower level of confidence in the protection measures in terms of air travel: 36%, 36% and 38%, respectively.

Regarding travel habits, as expected, **both for European and US/ Canada residents, the average travel duration increased** as shown in the tables below respectively, with no significant differences observed between countries of origin. It should be stressed that the percentage of travellers from European markets who preferred to spend more than 2 weeks on holiday (51%) almost doubled compared to 2019 (26%).

Table 4 Trip duration for residents of Europe

Trip duration	Jan-Nov 2021	2020	2019
1-2 days	1%	1%	1%

3-4 days	6%	10%	12%
5-6 days	21%	37%	42%
1 week	22%	17%	19%
2 weeks	41%	25%	21%
3-4 weeks	8%	5%	3%
More than 1 month	2%	6%	2%

Table 5 Trip duration for residents of US/ Canada

Trip duration	Jan-Nov 2021	2020	2019
1-2 days	0%		1%
3-4 days	8%	19%	11%
5-6 days	24%	37%	33%
1 week	17%	9%	13%
2 weeks	22%	18%	30%
3-4 weeks	20%	9%	10%
More than 1 month	9%	9%	3%

In contrast, as far as the **Greek market is concerned, there was no relevant change**, indicating that the effects on international markets were – among other things – due to the existence of international travel restrictions.

Table 6 Trip duration for residents of Greece

Trip duration	Jan-Nov 2021	2020	2019
1-2 days	16%	18%	13%
3-4 days	29%	30%	28%
5-6 days	21%	22%	28%
1 week	12%	9%	11%
2 weeks	13%	11%	13%
3-4 weeks	5%	5%	4%
More than 1 month	4%	4%	3%

2.3. THE DOMESTIC MARKET CONTINUES TO SUPPORT INTERNATIONAL TRAVEL | PRIMARY ONLINE GREEK MARKET SURVEY

Despite health developments, 53% of Greeks plan to travel in the next 6 months (until July 2022) either in Greece or abroad. Interestingly, **this is below the 61.1%** European **average** [24]. 76% of Greeks will stick to their travel plans with some changes regarding destination, timing, and mode of transport.

32% of Greeks have decided where to travel but **have not yet made a reservation**. Interestingly, 33.5% of Greeks who have decided to **travel domestically**, **have not yet chosen their destination** and 32.9% have not made a reservation.

32.4% of Greeks reckon that they will travel **in May or June**[25], 25.5% in **March or April**, whereas 20% do not yet know when they will travel. The indecision about the exact timing of the next trip is confirmed by the fact that **only 14%** of respondents **have booked everything for their trip**. The **percentage of those who have booked everything drops to 10.9%,** and, respectively, the percentage of **those who do not know when they will travel increases** by 6 percent (26.3%) among **those who choose Greece**, as well as the percentage of persons who will travel in May or June which rises to 34.6%.

In general, **COVID-19 vaccination** and **European digital COVID-19 certificates** are **less important factors** for the travel plans of Greeks compared to Europeans (38% versus 44.4% and 47% versus 51.7% respectively). Note that, as far as Europeans are concerned, there is a downward trend in terms of the impact of the above tools on the willingness to travel recorded in Wave 10 of the European Travel Commission's survey.

The **means of transport at the destination** (e.g. buses, metro, etc.) cause **greater concern in terms** of Health and Safety to Greeks than **air travel** (17.8% from 12.1% respectively). Whereas, **getting sick during the trip** (14.9%), **quarantine measures at the destination** (13.7%) and **the increase in COVID-19 cases** at the destination (12.1%) are the top 3 factors of concern for those willing to travel in the next 6 months.

In this group, **discounts and promotions** (12.1%), **pre-travel COVID-19 testing** (11.3%), and **Health and Safety protocols** at the destination (10.9%) are factors that will boost the willingness to travel. Interestingly, **COVID-19 vaccination** (7.7%) is only 6th in **order of priority for this group –** after flexible cancellation policies (8.6%) and complete lifting of travel restrictions (7.9%).

The strict Health and Safety protocols at the destinations make 47.2% of Greeks feel safer and calmer to enjoy their trip. Whereas those stating their willingness to **travel in the coming period** are even **more open to strict measures** (51%).

Among the group with short-term willingness to travel, 40.2% reckon that they will stay 4-6 nights, and 35.7% that they will choose a hotel for their stay. 28.5% will travel as a couple and 22.9% as a

[24] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 10, February 2022
[25] Months are calculated considering that the survey was carried out in January.

family. Interestingly, when **Greeks choose to travel in their country**, the percentage of those who will stay at a **family or friend's house increases** to 18.6% and the percentage of those who will choose a hotel drops by about 4 percent (31.8%).

The most popular destinations for Greeks are **Greece (9.3%), Italy (8.9%), France (5.9%), Germany (4.2%) and the United Kingdom (4.2%).** Greeks willing to travel in the next 6 months, choose the Region of Attica (10.9%), the Region of Central Macedonia (10.1%), the Region of Crete (9.7%), the Region of Thessaly (9%) and the Region of Western Macedonia (8.6%) as the 5 most popular Greek destinations by order of priority. Interestingly, destinations such as the **islands of the South Aegean do not occupy the top places**.

32.3% of travellers in this group will travel by plane and 30.7% by car. **Travel by boat is in 3rd place** with 15% - which is also justified by the timing of the survey (January 2022). As expected, **the percentage of those who will travel by car, among those who will choose to travel within Greece** in the coming period**, increases** by 7 points (37.3%). In this group, the airplane is in 2nd place (25.4%) and **the journey by train/bus in 3rd place** (15.9%).

Greeks willing to travel in Greece choose the **Region of Attica (12.6%), the Region of Thessaly (10.9%), the Region of Central Macedonia (9.8%), the Region of North Aegean (9.8%) and the Region of Crete (8.22%)** as the top 5 popular Greek destinations by order of priority.

27% of Greeks will travel for business or to attend a conference, and 38.8% for leisure. Interestingly, among **Greeks willing to travel in the next 6 months**, the percentage of those who will travel for **leisure increases** by almost 6 percentage points (44.7%), whereas the percentage of those who will travel **for business or to attend a conference drops** by approx. 3 points (23.6%). **Escaping from routine** (15.6%), **relaxing** (12.7%) and **creating new memories** (12.2%) is what Greeks miss the most about travelling.

Culture and Heritage (12%), Sun and Beach (10.6%) and **City Break (9.8%)** holidays are the most popular types of holidays for Greeks. Interestingly, for those willing **to travel in the next 6 months**, **City Break drops** to **5th place** (10.1%) with **food and cuisine experiences** (10.9%) and **holidays in nature** (10.5%) occupying **the 3rd and 4th place**, respectively.

Those travelling for **10-12 nights** mainly prefer yacht/sailing holidays (14.5%), mountain skiing holidays (12.9%) or outdoor holidays with activities in nature (12.9%). 29% of persons in this group reckon that they **will travel earlier** in March or April, 20.9% that they will travel with **friends**, and 19.3% that they will stay at a **friend's or family house.**

23.8% of Greeks say they are willing to spend up to €500 on their next trip, 21.2% from €501 – €1,000, 18.2% from €1,001 to €1,500and 11% from €1,501 to €2,000. 46% of those travelling for a **Culture and Heritage** holiday plan to spend from **€501 up to €1,500**. Whereas the percentage of those who will spend **up to €500**, increases by about 5 points (29.7%) among those who will choose the **Sun and Beach or Coast and Sea holidays**.

3. SATISFACTION WITH THE TOURIST PRODUCT IS INCREASING: SOCIAL LISTENING FOR GREECE (2019-2021)

This section summarizes the main conclusions of "social listening" for Greece as a tourist destination.

In particular, the section records and analyses online discussions on Twitter and TripAdvisor on **safety**, **COVID-19 and pandemic reports**, but mainly the **interest and satisfaction regarding all the tourist products** in Greek tourism during **2021 and 2019.**

The analysis of online discussions concerns the following 10 countries, important markets for Greece:

- **Medium – short haul:** Great Britain, France, Germany, Netherlands, Russia, Sweden, and Norway.
- **Long haul:** USA, Canada
- And the **Greek market**

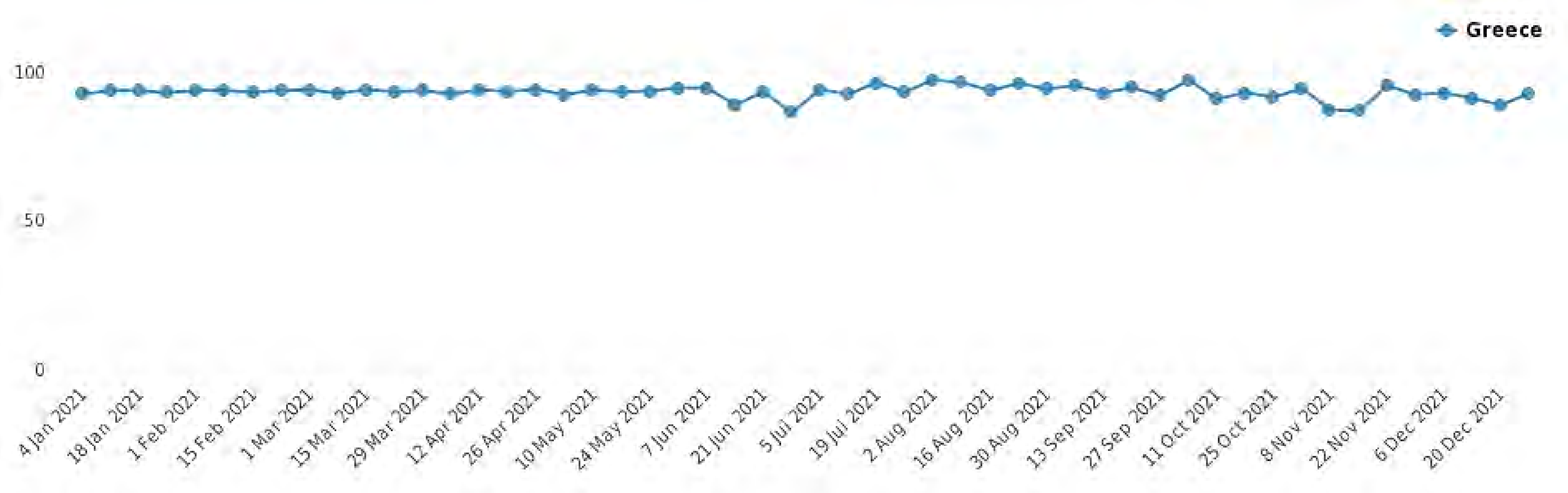
It is worth mentioning that all information and data is presented in the relevant Annex.

It should be stressed that as far as 2020 is concerned, the volume of online discussions was relatively limited to draw any useful and safe conclusions.

3.1. SAFETY: CONSISTENTLY VERY HIGH THROUGHOUT 2021

It is confirmed – based on social listening as well – that the **sense of safety was very high for the whole of 2021**.

Figure 1 Safety index for Greece as a tourist destination (2021)



Similarly, there were very few mentions in relation to tourism and COVD-19, always as regards Greece.

Figure 2 Online mentions in relation to tourism and COVID-19

3.2. TOURIST PRODUCT: AMONG THE HIGHEST LEVELS OF SATISFACTION IN EUROPE DESPITE THE PANDEMIC

3.2.1. In General

Meanwhile, satisfaction for all individual tourist products in Greece was very high - for 2021 -, especially for "Food and Cuisine", "Sunbathing", "Active Lifestyle" activities and leisure in "Nature", as shown below:

Figure 3 Greek tourist product satisfaction index (2021)

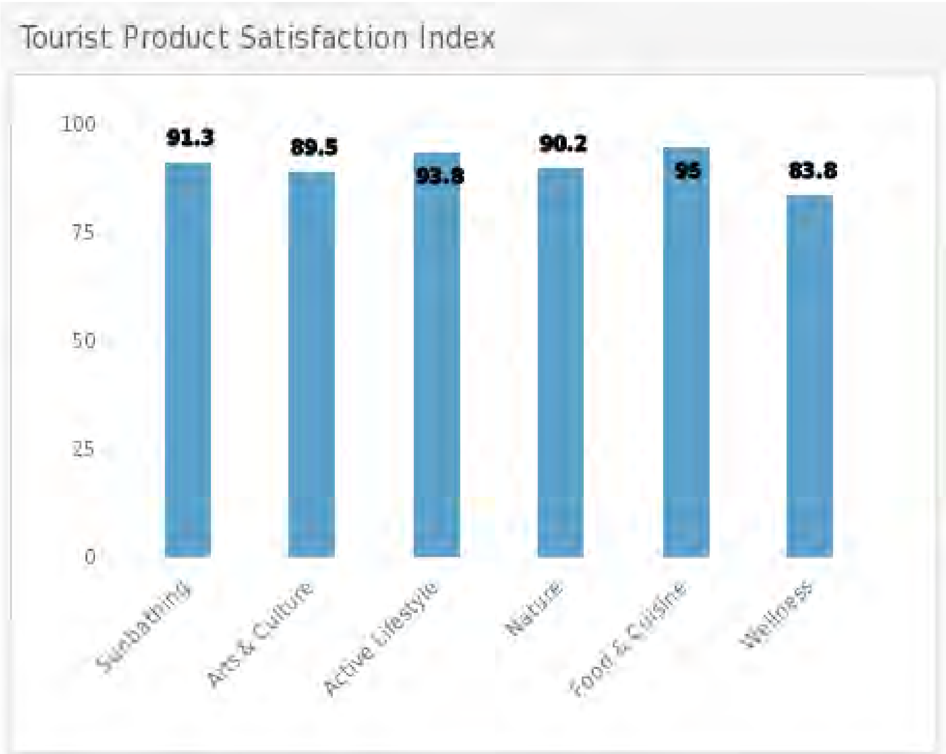
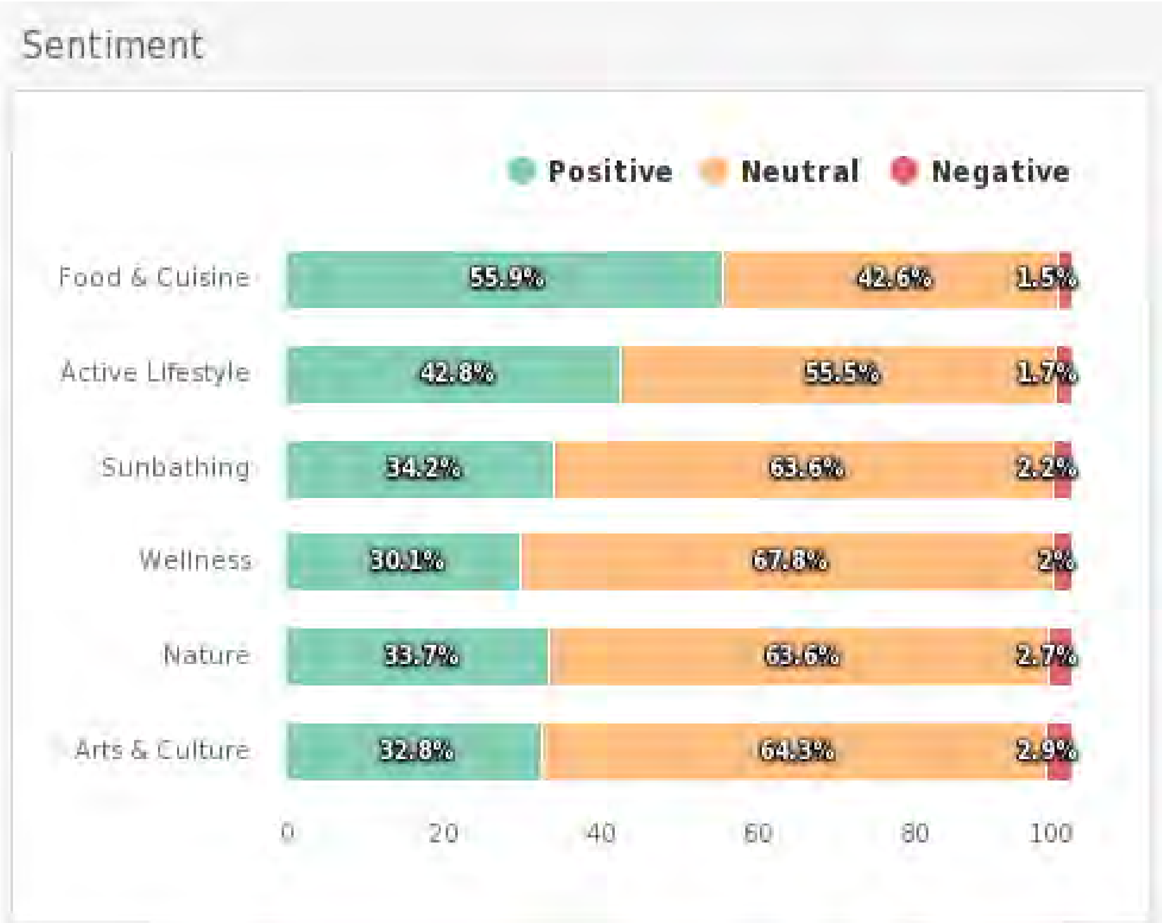
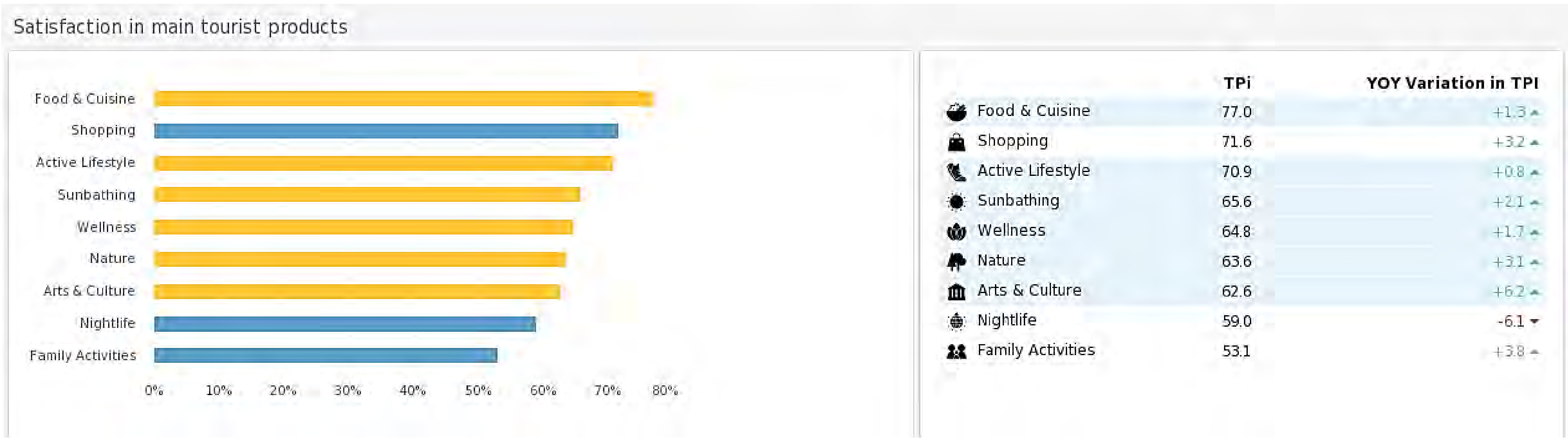


Figure 4 Sentiment per tourist product in online discussions (2021)



What is particularly important is the **increased satisfaction in 2021 compared to pre-pandemic levels (2019),** for the entire Greek tourist product as seen below, with "Arts and Culture", mild activities in “Nature" and "Family Activities” showing very good performance.

Figure 5 Satisfaction by main tourist product (2021) and variation (2021-2019)

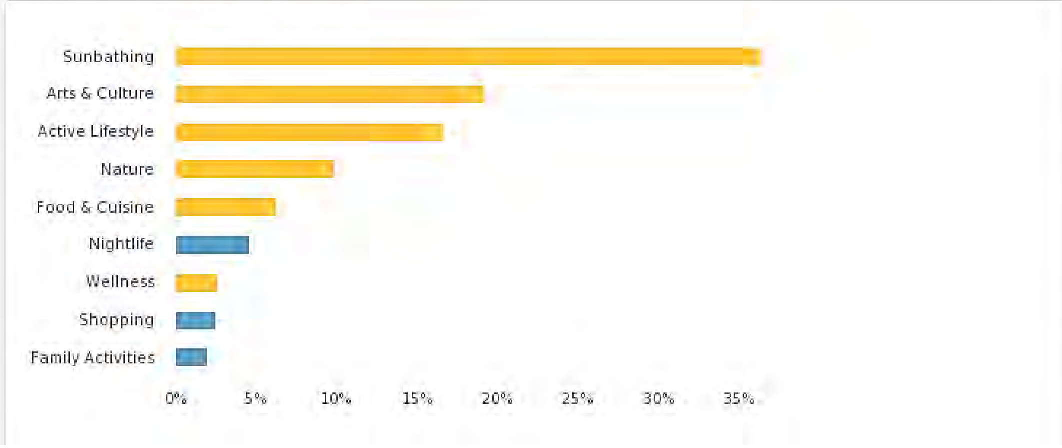


	TPi	YOY Variation in TPI
Food & Cuisine	77.0	+1.3 ▲
Shopping	71.6	+3.2 ▲
Active Lifestyle	70.9	+0.8 ▲
Sunbathing	65.6	+2.1 ▲
Wellness	64.8	+1.7 ▲
Nature	63.6	+3.1 ▲
Arts & Culture	62.6	+6.2 ▲
Nightlife	59.0	-6.1 ▼
Family Activities	53.1	+3.8 ▲

On the contrary, the situation regarding the interest in each tourist product is fragmented. In particular, there was **increased interest in "Sunbathing", "Food and Cuisine" and "Active Lifestyle",** but a **considerable drop (by 11.8%) in "Arts and Culture".**

Figure 6 Interest by main tourist product (2021) and variation (2021-2019)

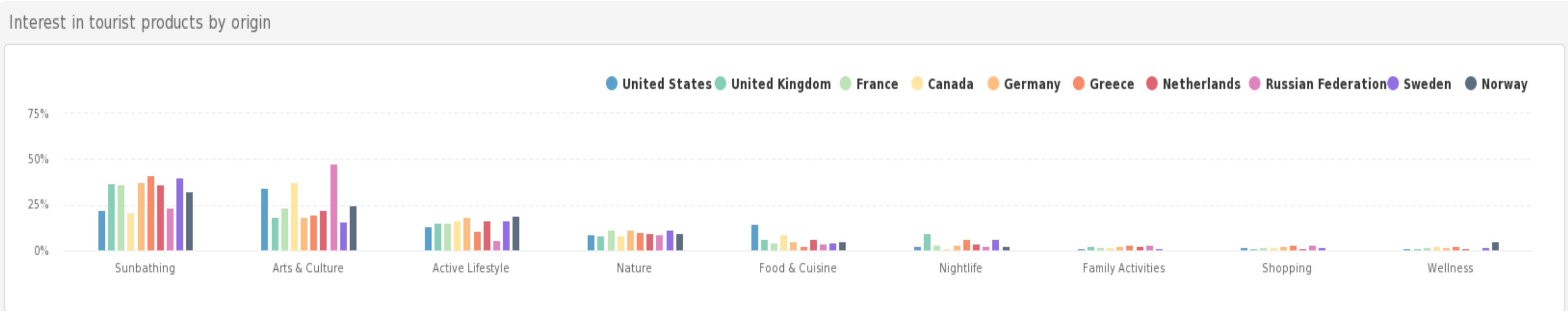
Interest in main tourist products



	% Share of Mentions	Variation in share YOY
Sunbathing	36.3%	+2.3 ▲
Arts & Culture	19.1%	-11.8 ▼
Active Lifestyle	16.6%	+6.9 ▲
Nature	9.8%	+0.5 ▲
Food & Cuisine	6.3%	+2.4 ▲
Nightlife	4.6%	-0.9 ▼
Wellness	2.6%	+1.3 ▲
Shopping	2.5%	+0.4 ▲
Family Activities	2.0%	-1.1 ▼

Interest by geographic market and tourist product (2021) is shown in the table below.

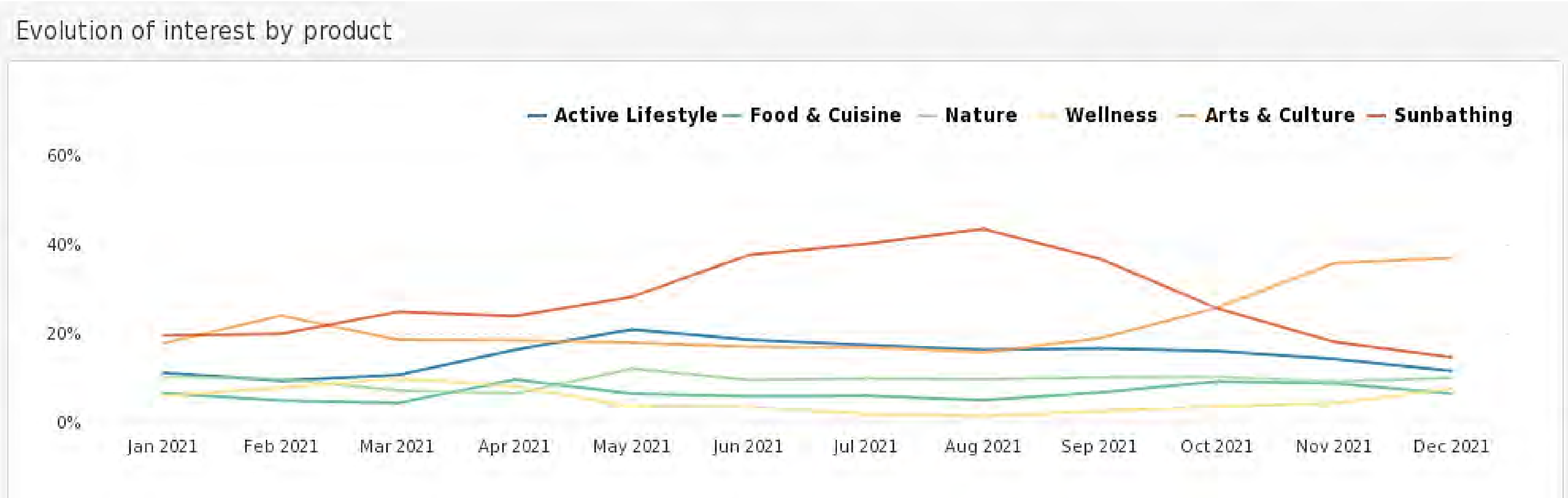
Figure 7 Interest by main tourist product and by market (2021)



- It seems that **"Sunbathing"** is of interest **to all EU markets**
- **"Arts and Culture", mainly the US, Canada, and Russia**.
- **"Active Lifestyle" and "Nature" are of interest to all the markets reviewed**.
- **"Food and Cuisine" mainly the US market**, while
- **"Wellness"** seems to be of special interest (proportionally) for **the Norwegian market**.

The figure below shows seasonality of interest by tourist product (2021):

Figure 8 Seasonality of interest by main tourist product (2021)



3.2.2. Great Britain

Britons show great interest in “Sunbathing”, “Arts and Culture” (but with a significant drop compared to 2019, as observed in general) and “Active Lifestyle”, and continue to be very satisfied with their experience in Greece, especially as regards "Wellness".

Figure 9 Interest by main tourist product (2021) and variation (2021-2019) from Great Britain

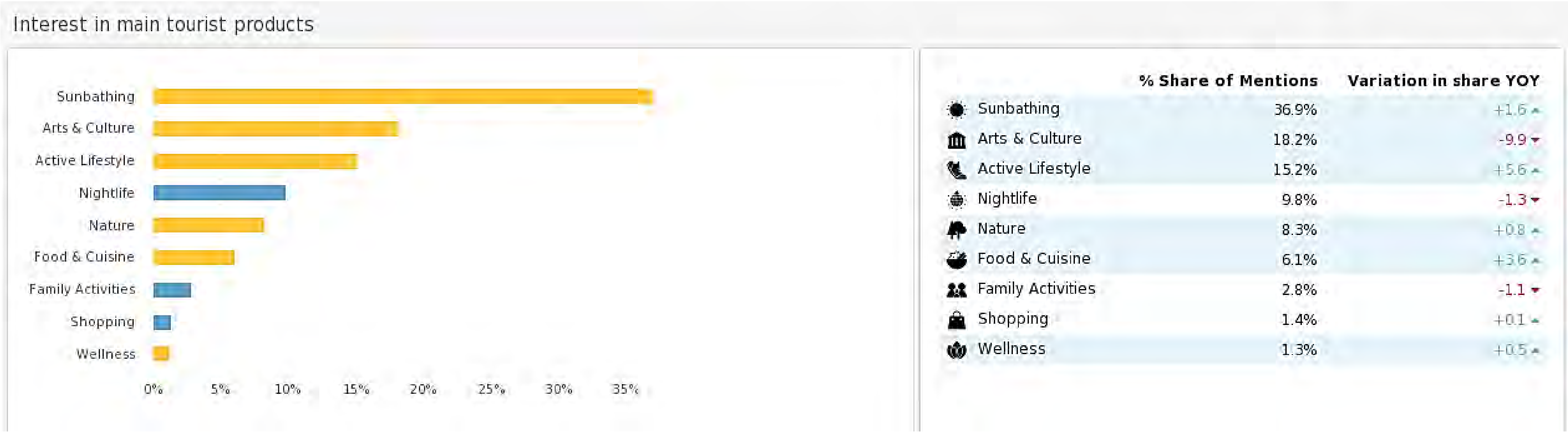
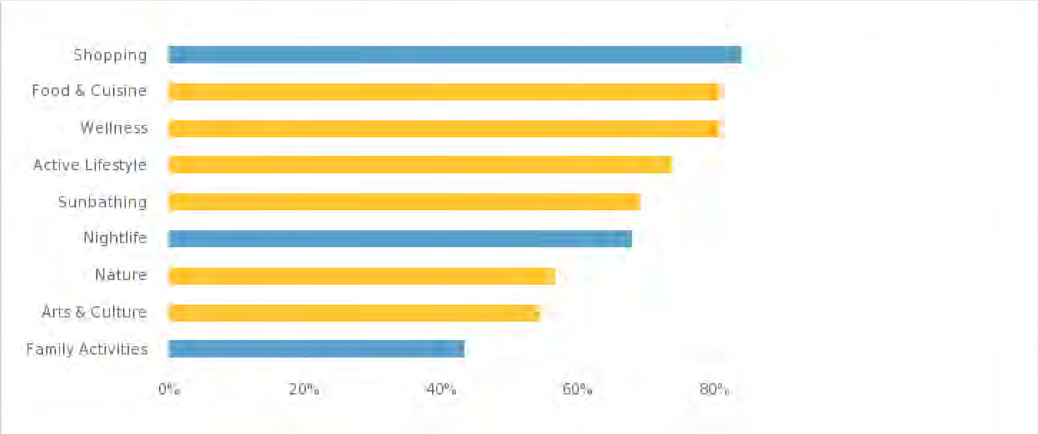


Figure 10 Satisfaction by main tourist product (2021) and variation (2021-2019) from Great Britain

Satisfaction in main tourist products



	TPi	YOY Variation in TPI
Shopping	84.1	+9.0
Food & Cuisine	80.8	+0.1
Wellness	80.7	+11.6
Active Lifestyle	73.8	-0.7
Sunbathing	69.3	+5.2
Nightlife	67.9	-3.9
Nature	56.8	+3.2
Arts & Culture	54.5	+10.3
Family Activities	43.5	+1.4

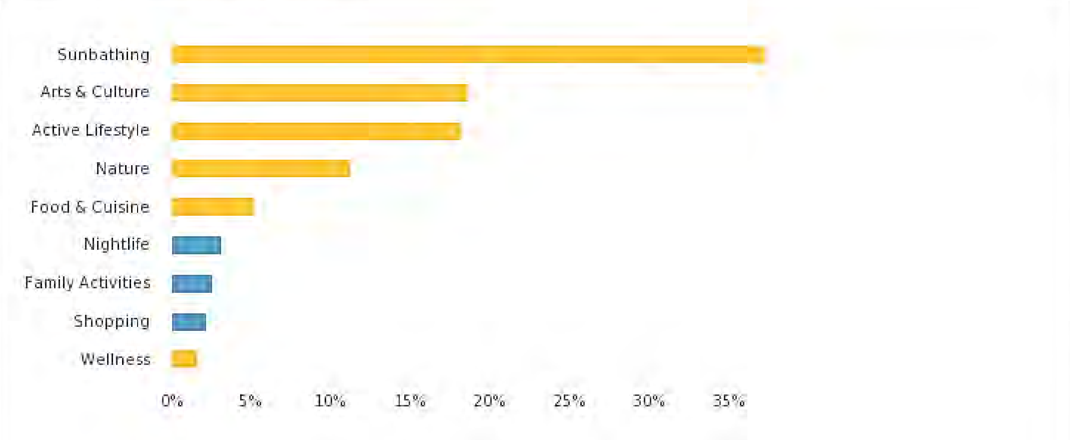
3.2.3. Germany

“Sunbathing” seems to monopolize the interest of Germans in Greece, followed by “Arts and culture” (but with a significant drop compared to 2019) and Active Lifestyle” at quite a distance behind.

As for of their satisfaction – especially compared to 2019 – it seems to be at stable, satisfactory levels, however, they seem to be less satisfied with “Food and Cuisine” and “Wellness” compared to 2019.

Figure 11 Interest by main tourist product (2021) and variation (2021-2019) from Germany

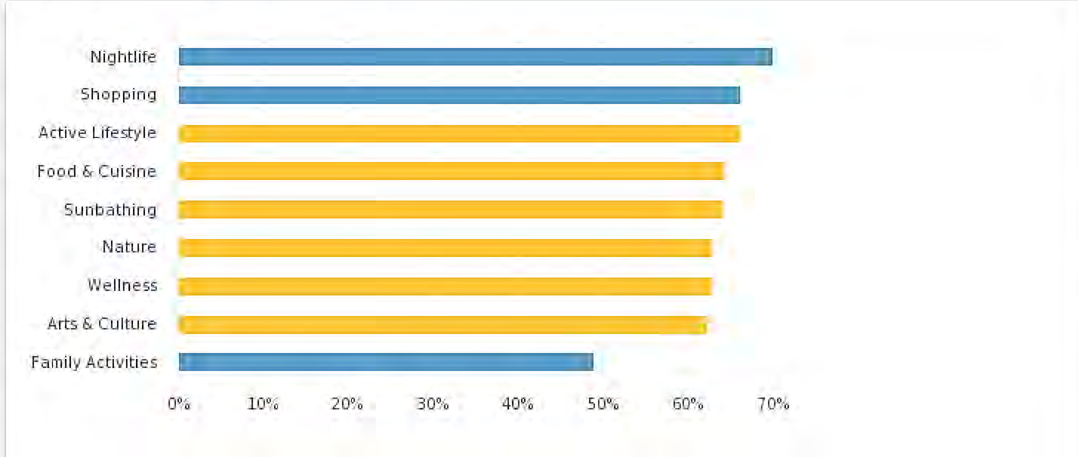
Interest in main tourist products



	% Share of Mentions	Variation in share YOY
Sunbathing	37.2%	+2.5
Arts & Culture	18.6%	-12.1
Active Lifestyle	18.2%	+7.0
Nature	11.2%	+0.5
Food & Cuisine	5.2%	+2.6
Nightlife	3.1%	-0.7
Family Activities	2.6%	-0.1
Shopping	2.3%	-0.3
Wellness	1.7%	+0.6

Figure 12 Satisfaction by main tourist product (2021) and variation (2021-2019) from Germany

Satisfaction in main tourist products

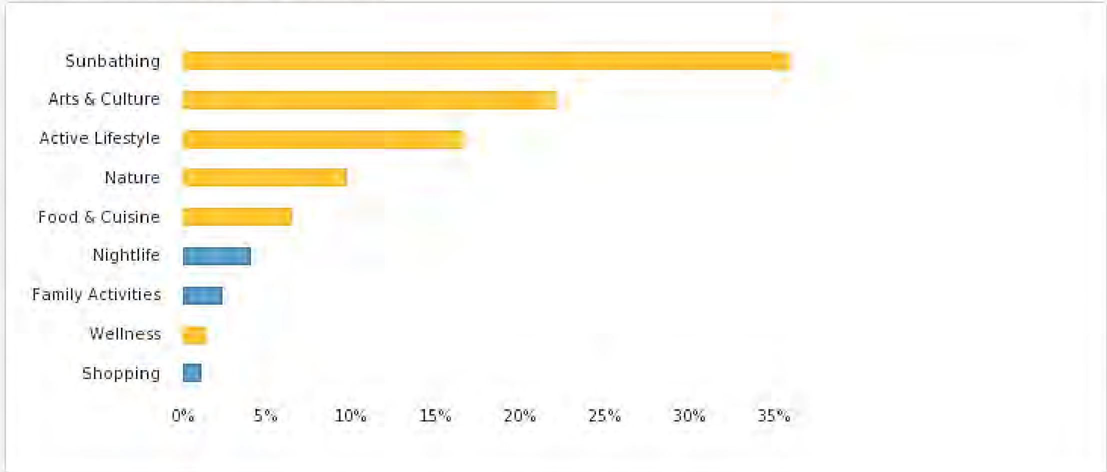


	TPi	YOY Variation in TPI
Nightlife	69.9	+7.4
Shopping	66.1	-0.1
Active Lifestyle	66.0	-0.9
Food & Cuisine	64.2	-4.1
Sunbathing	64.1	+1.7
Nature	62.8	+2.7
Wellness	62.8	-5.7
Arts & Culture	62.2	+1.6
Family Activities	48.9	+2.0

3.2.4. The Netherlands

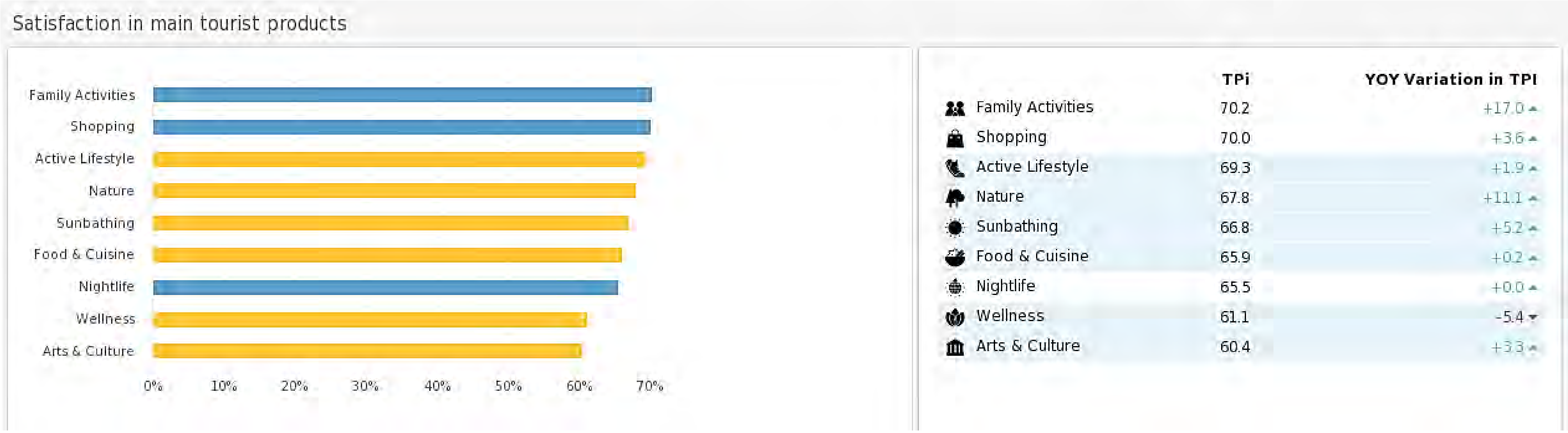
Dutch travellers seem to have a keen interest for “Sunbathing”, but it is also worth mentioning that there is a considerable increase in satisfaction (between 2021 and 2019) as regards activities in “Nature”.

Figure 13 Interest by main tourist product (2021) and variation (2021-2019) from the Netherlands



	% Share of Mentions	Variation in share YOY
Sunbathing	36.0%	+1.0
Arts & Culture	22.1%	-9.1
Active Lifestyle	16.6%	+6.5
Nature	9.7%	-1.9
Food & Cuisine	6.6%	+4.1
Nightlife	4.1%	+0.2
Family Activities	2.4%	-0.6
Wellness	1.4%	+0.6
Shopping	1.1%	-0.6

Figure 14 Satisfaction by main tourist product (2021) and variation (2021-2019) from the Netherlands



3.2.5. France

The French show great interest in “Sunbathing” and “Arts and Culture” (but with a significant drop compared to 2019) followed by “Active Lifestyle”, and continue to be very satisfied with their experience in Greece, in terms of all tourist products.

Figure 15 Interest by main tourist product (2021) and variation (2021-2019) from France

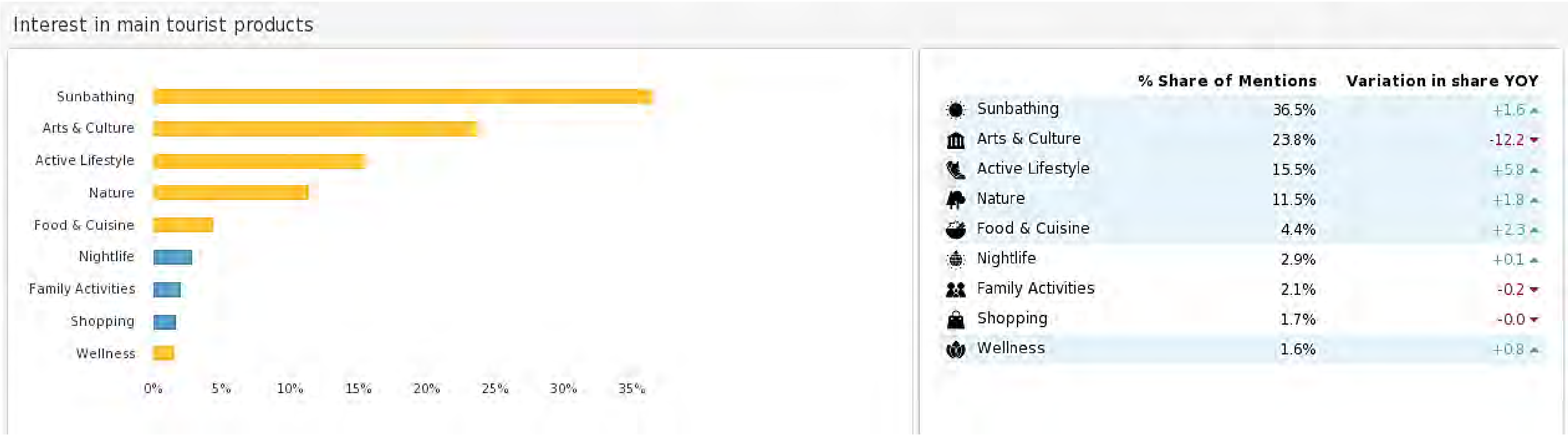
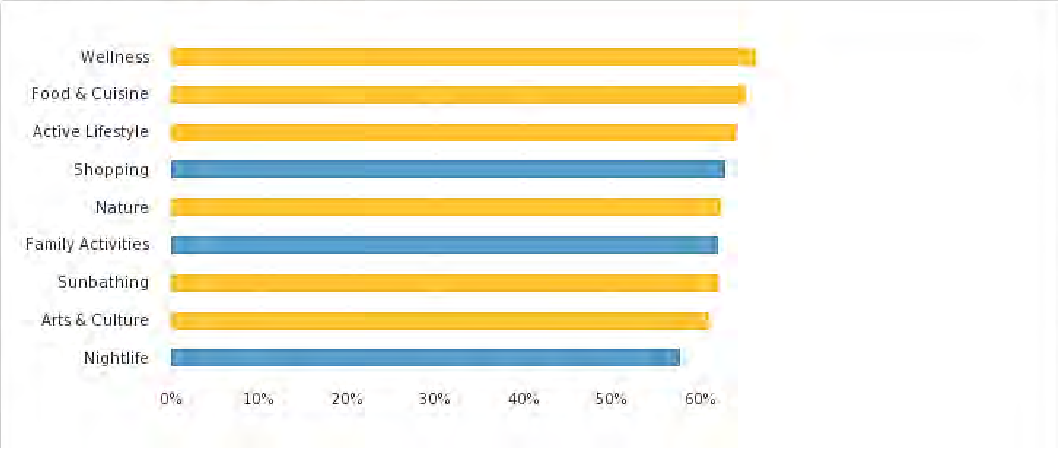


Figure 16 Satisfaction by main tourist product (2021) and variation (2021-2019) from France

Satisfaction in main tourist products

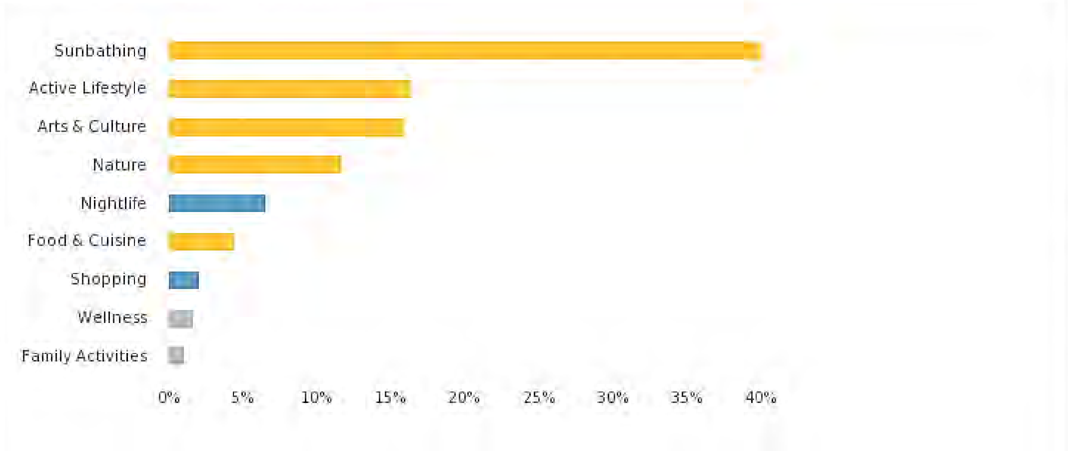


	TPi	YOY Variation in TPI
Wellness	66.4	+2.3
Food & Cuisine	65.1	+4.8
Active Lifestyle	64.0	+0.4
Shopping	63.0	-0.7
Nature	62.5	+2.1
Family Activities	62.1	+3.0
Sunbathing	62.1	+1.9
Arts & Culture	61.1	+2.0
Nightlife	57.7	+1.5

3.2.6. Sweden

Figure 17 Interest by main tourist product (2021) and variation (2021-2019) from Sweden

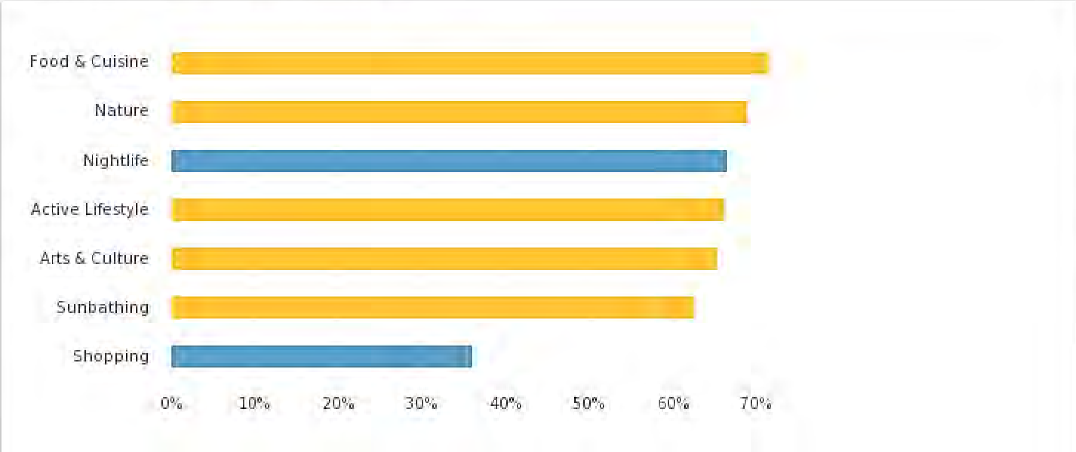
Interest in main tourist products



	% Share of Mentions	Variation in share YOY
Sunbathing	40.0%	-1.8 ▾
Active Lifestyle	16.4%	+8.5 ▴
Arts & Culture	16.0%	-11.7 ▾
Nature	11.7%	+3.5 ▴
Nightlife	6.6%	+0.1 ▴
Food & Cuisine	4.5%	+1.8 ▴
Shopping	2.1%	+0.4 ▴
Wellness	1.7%	+0.6 ▴
Family Activities	1.1%	-1.4 ▾

Figure 18 Satisfaction by main tourist product (2021) and variation (2021-2019) from Sweden

Satisfaction in main tourist products

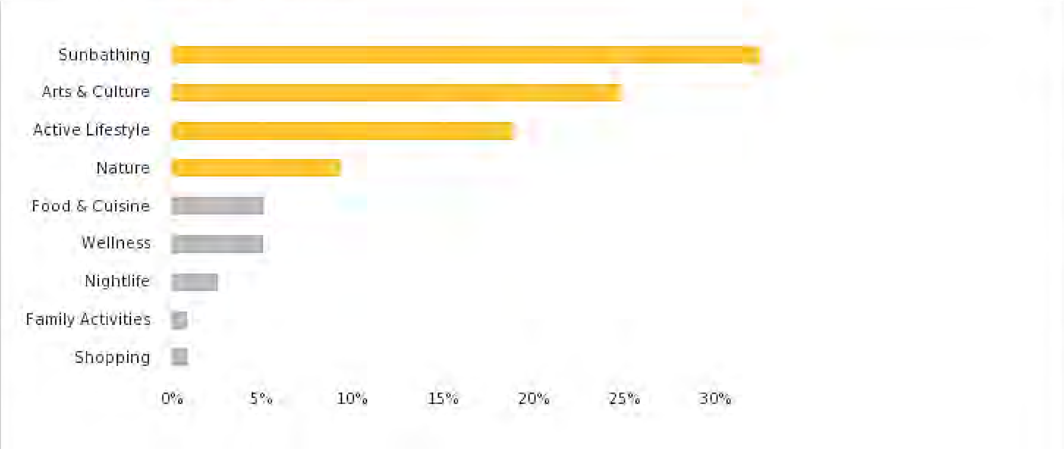


	TPi	YOY Variation in TPI
Food & Cuisine	71.4	+10.7 ▲
Nature	68.7	+12.4 ▲
Nightlife	66.5	+0.6 ▲
Active Lifestyle	66.2	-14.7 ▼
Arts & Culture	65.3	+6.0 ▲
Sunbathing	62.6	-1.3 ▼
Shopping	36.0	-31.8 ▼

3.2.7. Norway

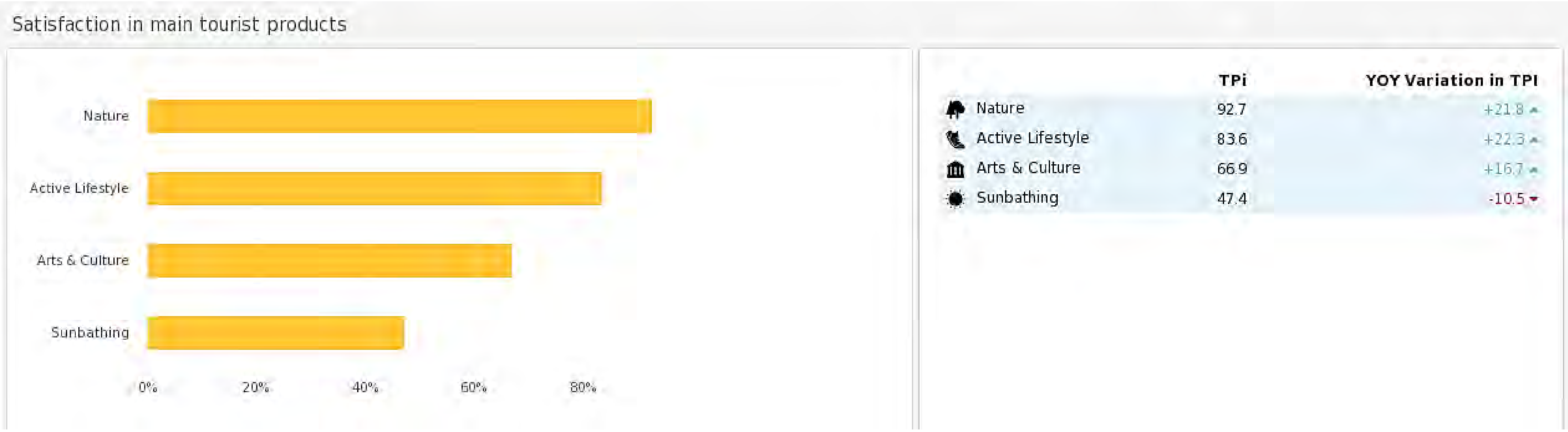
Figure 19 Interest by main tourist product (2021) and variation (2021-2019) from Norway

Interest in main tourist products



	% Share of Mentions	Variation in share YOY
Sunbathing	32.5%	-6.0
Arts & Culture	24.8%	+1.8
Active Lifestyle	18.8%	+8.8
Nature	9.4%	+0.3
Food & Cuisine	5.1%	+2.1
Wellness	5.1%	+2.3
Nightlife	2.6%	-5.6
Family Activities	0.9%	-2.4
Shopping	0.9%	-1.5

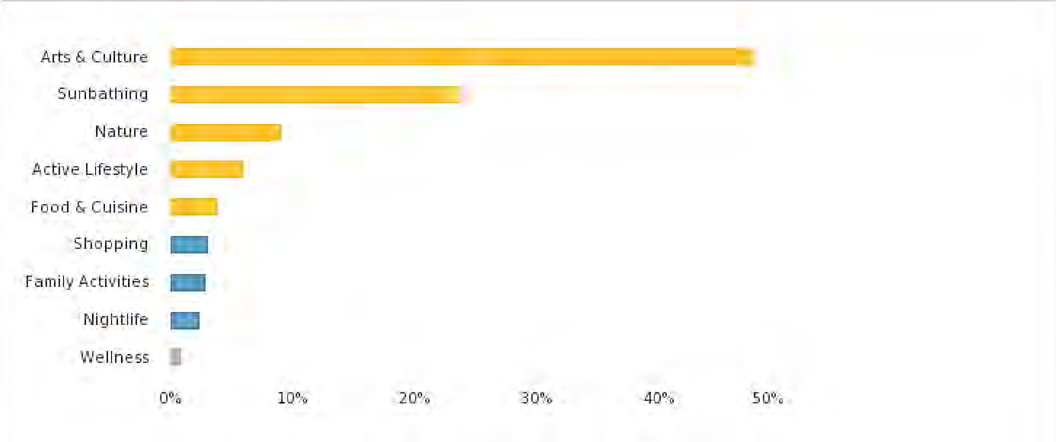
Figure 20 Satisfaction by main tourist product (2021) and variation (2021-2019) from Norway



3.2.8. Russia

Figure 21 Interest by main tourist product (2021) and variation (2021-2019) from Russia

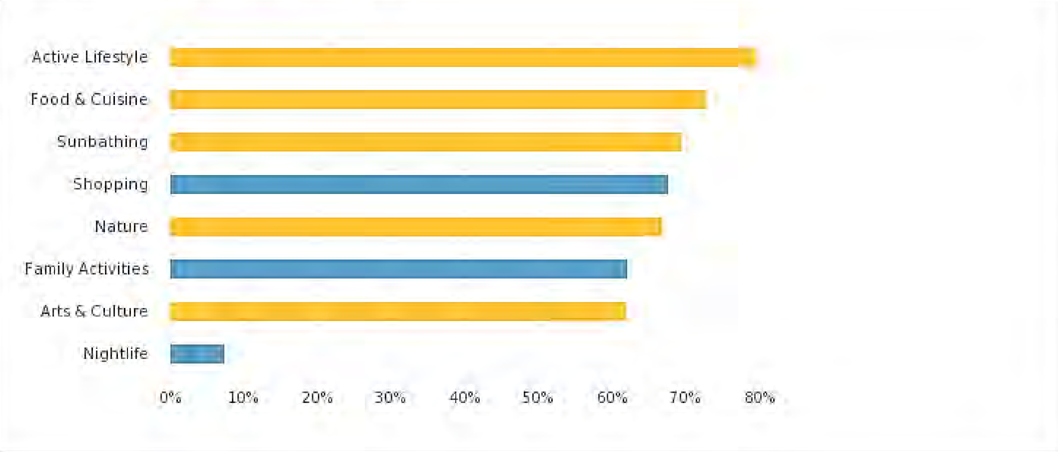
Interest in main tourist products



	% Share of Mentions	Variation in share YOY
Arts & Culture	47.8%	+7.4 ▲
Sunbathing	23.6%	-8.6 ▼
Nature	9.1%	-0.7 ▼
Active Lifestyle	6.0%	+1.4 ▲
Food & Cuisine	3.9%	+1.9 ▲
Shopping	3.2%	+0.5 ▲
Family Activities	2.9%	-2.4 ▼
Nightlife	2.5%	+0.6 ▲
Wellness	0.9%	-0.1 ▼

Figure 22 Satisfaction by main tourist product (2021) and variation (2021-2019) from Russia

Satisfaction in main tourist products



	TPi	YOY Variation in TPI
Active Lifestyle	79.5	+15.9 ▲
Food & Cuisine	72.8	+6.7 ▲
Sunbathing	69.4	+7.6 ▲
Shopping	67.6	+1.6 ▲
Nature	66.8	+7.3 ▲
Family Activities	62.1	+3.9 ▲
Arts & Culture	61.8	+2.4 ▲
Nightlife	7.5	-59.5 ▼

3.2.9. USA

As far as US travellers are concerned, they show greatest interest in “Arts and Culture”, and appear quite satisfied with “Wellness” and “Food and Cuisine” experiences in Greece compared to 2019.

Figure 23 Interest by main tourist product (2021) and variation (2021-2019) from USA

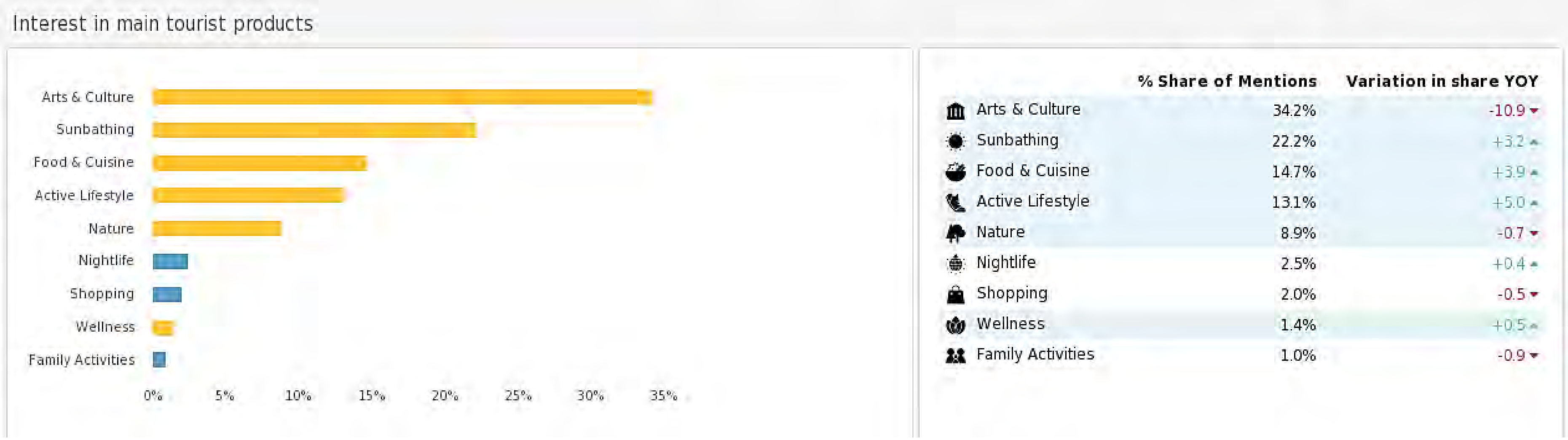
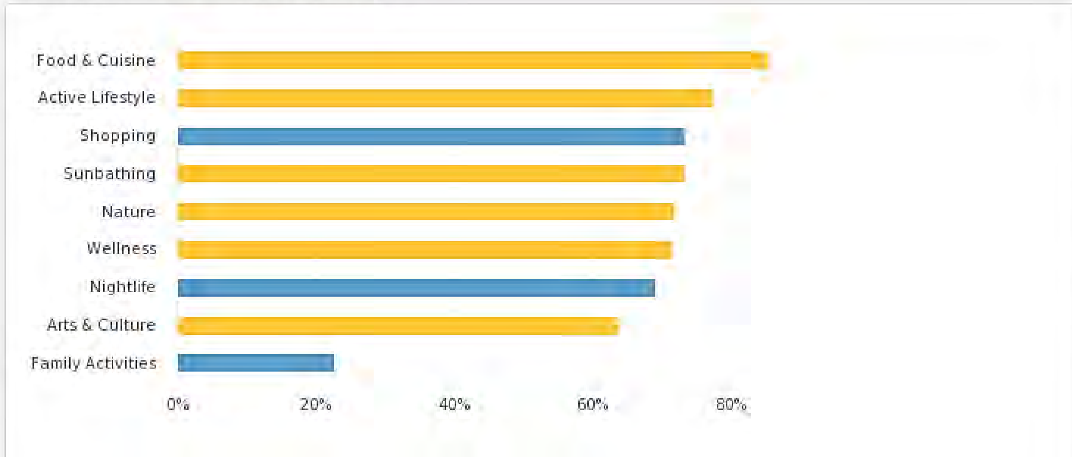


Figure 24 Satisfaction by main tourist product (2021) and variation (2021-2019) from USA

Satisfaction in main tourist products

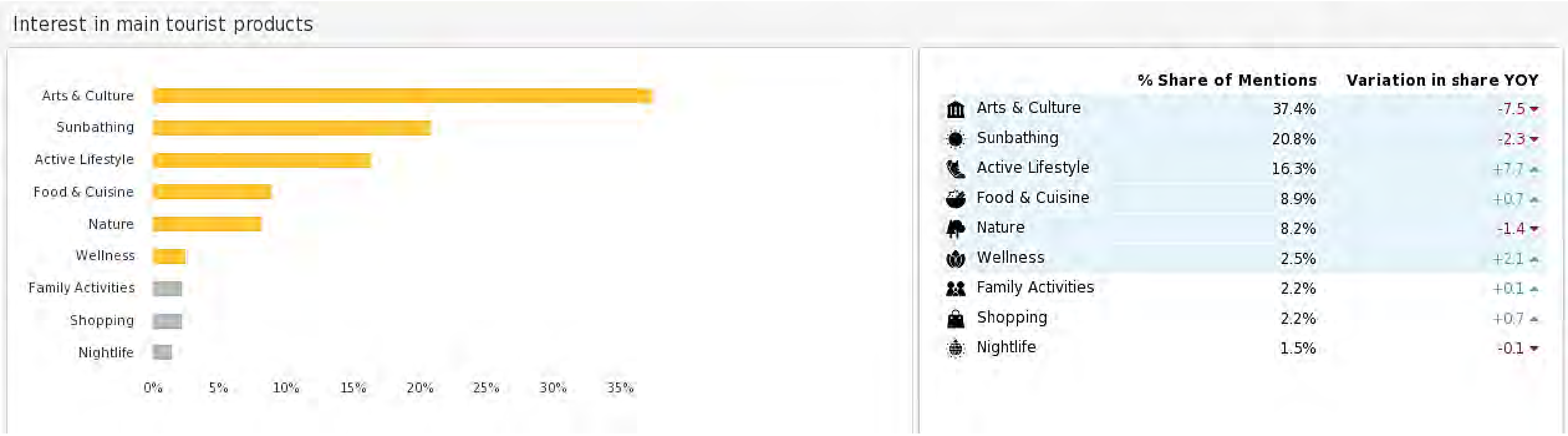


	TPi	YOY Variation in TPI
Food & Cuisine	85.4	+4.2
Active Lifestyle	77.3	+1.9
Shopping	73.3	-0.4
Sunbathing	73.2	+3.8
Nature	71.8	+4.1
Wellness	71.3	+10.8
Nightlife	69.0	-4.9
Arts & Culture	63.8	+11.2
Family Activities	22.8	-16.6

3.2.10. Canada

It is interesting to note the considerable satisfaction increase (between 2021 and 2019) as regards activities in “Nature” among Canadian travellers.

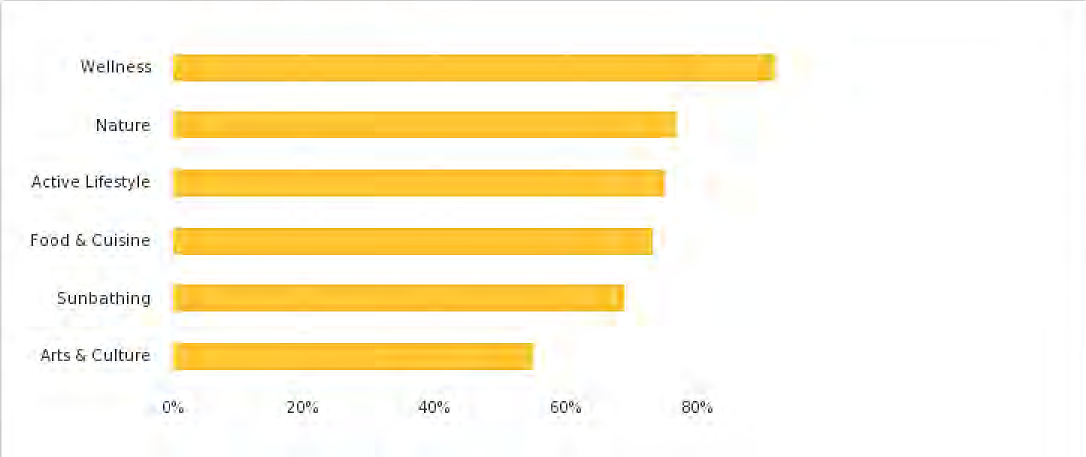
Figure 25 Interest by main tourist product (2021) and variation (2021-2019) from Canada



	% Share of Mentions	Variation in share YOY
Arts & Culture	37.4%	-7.5
Sunbathing	20.8%	-2.3
Active Lifestyle	16.3%	+7.7
Food & Cuisine	8.9%	+0.7
Nature	8.2%	-1.4
Wellness	2.5%	+2.1
Family Activities	2.2%	+0.1
Shopping	2.2%	+0.7
Nightlife	1.5%	-0.1

Figure 26 Satisfaction by main tourist product (2021) and variation (2021-2019) from Canada

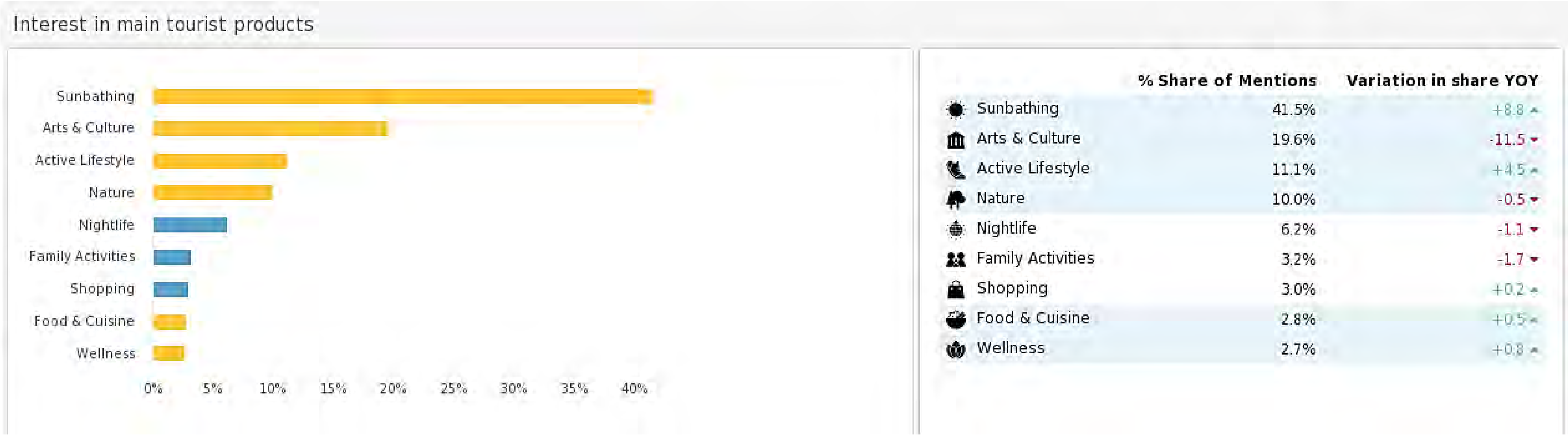
Satisfaction in main tourist products



	TPi	YOY Variation in TPI
Wellness	92.0	+8.7 ▲
Nature	77.0	+28.3 ▲
Active Lifestyle	75.2	+4.1 ▲
Food & Cuisine	73.3	+0.9 ▲
Sunbathing	69.0	+7.5 ▲
Arts & Culture	55.2	+5.0 ▲

3.2.11. Greece

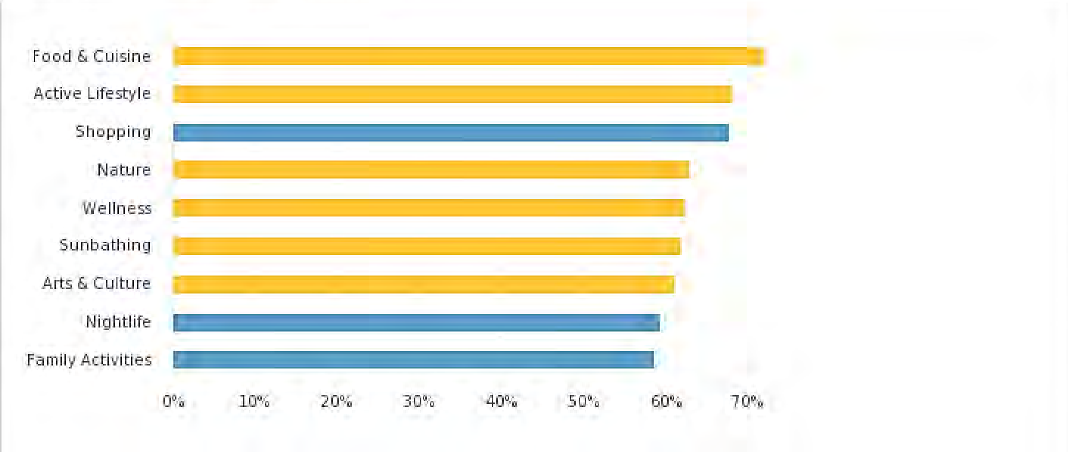
Figure 27 Interest by main tourist product (2021) and variation (2021-2019) from Greece



	% Share of Mentions	Variation in share YOY
Sunbathing	41.5%	+8.8 ▲
Arts & Culture	19.6%	-11.5 ▼
Active Lifestyle	11.1%	+4.5 ▲
Nature	10.0%	-0.5 ▼
Nightlife	6.2%	-1.1 ▼
Family Activities	3.2%	-1.7 ▼
Shopping	3.0%	+0.2 ▲
Food & Cuisine	2.8%	+0.5 ▲
Wellness	2.7%	+0.8 ▲

Figure 28 Satisfaction by main tourist product (2021) and variation (2021-2019) from Greece

Satisfaction in main tourist products



	TPi	YOY Variation in TPI
Food & Cuisine	72.0	+2.8 ▲
Active Lifestyle	68.1	+1.1 ▲
Shopping	67.8	+0.9 ▲
Nature	62.9	+1.4 ▲
Wellness	62.3	-0.1 ▼
Sunbathing	61.9	-0.9 ▼
Arts & Culture	61.1	+1.7 ▲
Nightlife	59.3	-3.4 ▼
Family Activities	58.5	+2.3 ▲

4. ADDRESSING THE PANDEMIC, A LEGACY FOR THE FUTURE (?): INTERVIEWS WITH STAKEHOLDERS

Between October and December 2021, structured interviews were conducted with the main stakeholders involved in Greek tourism as well as in the national tourism marketing strategy, based on a structured discussion guide.

The main points of each discussion as well as the details of the attendees in each interview are included in the relevant Annex.

Key discussion themes:

- Identity Strategy | Promise and Positioning
- Marketing Strategy
    - Purpose and Objectives
    - Critical Trends and Priorities
    - Strategic Target Audiences
    - Competition and Standards
- Action Plan
    - Research and Information
    - Tourist Product and Guest Experience
    - Marketing and Communication

4.1. KEY POINTS

In the context of the interviews, the participating bodies identified and reported the following directions:

<u>In relation to Greece's competitive advantages</u>

- Very good positioning in relation to key competitors and a "legacy" from the highly effective management during the 1st stage of the pandemic (March-May 2020).
- Timely announcement of the "opening" of Greek tourism in spring 2021 and credible fulfilment of this promise.
- Concrete, detailed and timely design of COVID-19 protocols applicable to the operation of hotels, which is an international benchmark.
- Great satisfaction from the Greek tourist product (in contrast to the communication of such satisfaction which – according to some bodies – was inadequate).

- A positive picture regarding the pandemic and epidemiological characteristics, notably in terms of inbound tourism, tourist destinations as well as the low occupancy of reference hotels for COVID-19 patients.

In relation to geographical target markets: :

- Middle Eastern markets continue to be priority markets in cooperation with airlines such as Qatar and Emirates.
- Downgrading of China's importance since, according to estimates, it will “open” late (2024-2025); just monitoring/attendance of travel trade events with the cooperation of GNTO China.

In relation to targeting and the action plan:

- Maintain the health and safety credibility asset. Nevertheless, communication of the safety parameter should be indirect and not predominant.
- Destinations and Destination Marketing and Management Organizations (DMMOs) describing specifically what type of tourist products and activities they will develop and promote, but especially which ones they will give up.
- Development and promotion of experiences and multi-theme tourist products.
- Targeted approach of new market segments such as the Greek diaspora.
- Restart the effort to promote Athens as a Sun and Sea destination via product development (air tickets, accommodation, cruise) in cooperation with the Athens-Attica Hotels Association and with a proper communication campaign.
- Public rear-view account/ information on the results of national tourism promotion campaigns, both for transparency reasons but mainly to exchange conclusions and develop know-how to constantly improve the effectiveness of similar actions by all stakeholders.
- Enhance the cooperation share with airlines as regards the part of the total promotional budget available for joint advertising.
- Continue the joint advertising model:
    - With Tour Operators on condition that, in addition to popular tier-1 destinations, it will also cover tier-2 alternative destinations with a minimum number of flights to improve the spread of tourist flows.
    - With airlines with an increased share of the total joint advertising budget, compared to previous years.
- Set the long-term goal of positioning Greece as a sustainable tourist destination, initially by implementing product-related actions in tourist destinations with suitable infrastructure and services.

5. STRONG BRAND, STRONGER CHALLENGES: STRATEGIC ANALYSIS AND TARGETING

5.1. PESTLE ANALYSIS

PESTLE analysis is a strategic marketing tool used to analyse the macro-environment of an organization or region. The PESTLE acronym is derived from the words Political, Economic, Social, Technological, Environmental and Legal factors of an organisation's macro-environment. In other words, it is an integrated presentation of the external environment.

The usefulness of this method is founded on the fact that an organisation cannot achieve success without information about its environment.

5.1.1. Political

- Very positive picture of how the Hellenic government dealt with the first stage of the pandemic (March – May 2020), and very high credibility of the country as a tourist destination, following the "official opening" of the summer season of Greek tourism (May 2021), despite the need for timely information regarding health regulations for international audiences.
- Improvement of the feeling of "Safety" for Greece compared to 2019 according to social listening data from 10 major international markets (incl. United States, Canada, France, Germany, Great Britain, and the Nordic countries).
- Fragmented travel restrictions in the various European Union countries in response to new variants and the increased number of cases resulting in greater uncertainty, especially as regards travel timing, but also limited commitment by consumers to travel (bookings).
- Non-recognition of Sputnik V vaccine by the European Medicines Agency (EMA)
- The war between Ukraine and Russia with very significant geopolitical and humanitarian implications as well as negative effects on energy efficiency and on the operating costs of tourism businesses.
- 2022 is an election year in two major markets for Greece (midterm elections in the USA and national elections in France).
- At the same time, national elections will be held in Australia, and China will hold the 20th National People's Congress of the CCP.

5.1.2. Economic

- Considerable support provided to tourism businesses and employees during the healthcare crisis globally. Meanwhile, there is an increase in household savings while financial issues and disposable income are still of no significant concern to travellers from key European markets for 2022.
- Governments are not expected to reduce their overall borrowing levels soon and, as a result, the wider macroeconomic environment is conducive to increased tourism demand despite higher prices observed.
- Considerable increase in 2021 per capita travel expenditure, both in Greece and in Europe, compared to pre-pandemic levels, but with fewer trips within the year, lasting longer.
- Many non-redeemable 2020 travel vouchers from the Russian market to Greece due to the bankruptcy of a certain Tour Operator.
- The very low exchange rate between the Turkish lira and Euro, Rouble* and Dollar makes Turkey a very attractive and price-competitive destination, and is expected to affect demand among market segments viewing cost as one of the key factors in the purchase of tourist services.
- Much smaller booking window due to both the uncertainty about international travel and the flexible cancellation policies offered by tourism service providers (airlines, OTAs, tourist accommodations, etc.).
- Positive estimates for average GDP growth (2022-2024): 4.5% internationally, 4.3% for the European Union and the USA as well as 4.4% for Great Britain in 2022, and 3.5%, 2.4% - 2.3% and 1.7% respectively.
- Greece's main non-EU competitors – and notably on the supply side (tourism service providers) – receive considerable financial support through financial policies that EU Member States cannot apply, resulting in these destinations being highly competitive in terms of prices.

5.1.3. Social

- Great desire among the main European markets for travel within Europe motivated by the desire to escape from routine but also to relax.
- Travel sentiment resilience despite the new variants and the exponential increase in the number of cases observed at the end of 2021.
- Increased desire for international travel among Central-Eastern European markets (e.g. Germany, Austria, the Netherlands), unlike travellers from Mediterranean countries (such as France, Italy, Spain) most of whom prefer domestic destinations.
- Limited percentage of vaccinated population in long haul markets (India, China, etc.) relative to European markets.

- Slight but steady drop in the contribution of Health and Safety related regulations and measures introduced by key European markets as “confidence boosters”, during the second half of 2021.
- A significant number of employees – mainly skilled personnel – exiting the tourism and travel sector in 2020-21.
- Regarding Social programmes such as “Tourism for All”, the absorption rate was at 20% (20 million euros) for the July 2020-December 2021 period, with periods of travel restrictions, and there were also specific destinations (e.g. North Aegean Islands) that saw a lot of tourist traffic thanks to the programmes. In any case, however, it is estimated that they have had limited contribution to the recovery of tourism volumes at national level, compared to competing countries.
- Increased domestic tourism during peak months due to the uncertainty in international travel regulations.
- Greek society expressed concerns and challenged the constant changes in the COVID-19 health restrictions, but also strong criticism that the relaxation of measures is mainly motivated by the start of the tourist season and boosting tourism activity.

5.1.4. Technological

- Reduced confidence in air travel from key European markets in 2020-21, in terms of personal health and safety.
- Considerable facilitation of international travel thanks to the EU digital COVID certificate.
- Great preference for contactless transactions throughout the tourist experience.
- Substitution of online platforms for physical presence business meetings and conferences resulting in a very small percentage of Business and MICE travel, despite the recovery of the intention for such travel observed at the end of 2021 in key European markets.
- Estimated significant progress in the treatment of COVID-19 (e.g. Paxlovid by Pfizer).
- Significant improvements to the digital transition of tourism businesses as a result of the pandemic, with positive and consistent results in both their operation and in the tourist experience.

5.1.5. Legal

- Quarantining and changing travel restrictions during a trip have been the main concern over international travel within Europe over the years.
- Great ambiguity as to the validity of travel regulations for intra-European travel.
- Fragmented picture regarding the recognition of Sputnik V vaccine for international travel:
    - Accepted by Greece, Cyprus, Croatia, Egypt, and Turkey
    - Not accepted by Spain, Italy, Portugal, and France.
- Lifting of COVID test requirement for entry to Greece as of 8/2/2022 for EU digital COVID certificate holders (vaccination and recovery).
- Simplification of health and safety regulations (e.g. abolition of the PLF) on air travel to Greece.

5.1.6. Environment

- Increased interest by travellers for "purposeful" holidays, i.e. for trips to support local communities but also to protect the environment.
- Increased extreme weather events due to the climate crisis, especially for the Euro-Mediterranean countries and, notably at the peak of the tourist season (e.g. forest fires in Athens – Attica, in August 2021).
- Slight tendency to reduce/ limit short haul flights in response to the climate crisis.
- Increased preference for single-use products during the pandemic.
- Interest by local destinations for leveraging tourism activity to meet the 2030 Agenda (e.g. cooperation between the WTO and the Municipality of Skiathos).

5.2. SCOPE ANALYSIS

SCOPE analysis is again a strategic marketing tool used to analyse a specific organisation or destination. The acronym SCOPE is derived from the words

- Situation – Review pertaining conditions that have a relevant and material impact on planning decisions with regards to internal or external environmental factors.
- Competencies – Unique abilities or assets of the business that provide the basis for the provision and realisation of value to customers, and are critical for the creation of competitive advantage.
- Obstacles – Potential issues that could jeopardise the realisation of future prospects.
- Prospects – Opportunities that exist internally or externally to the business which can enhance sales and / or profits, through leveraging Unique Selling Points.

- Expectations – Predictions of future internal and external conditions that are likely to materially influence, positively or negatively, the delivery of plans to meet the identified prospects.

In other words, SCOPE analysis is a comprehensive and in-depth assessment of the closest environment in which an organisation operates. This method is quite similar to SWOT analysis but more positive-oriented since Weaknesses and Threats have been replaced by Obstacles that need to be overcome and the Prospects and Expectations that need to be taken into account.

5.2.1. Situation

Review pertaining conditions that have a relevant and material impact on planning decisions with regards to internal or external environmental factors.

To facilitate reading, Demand and Supply information is presented in a different colour.

- Very good healthcare management of the first stage of the pandemic (March – May 2020).
- Greece has consistently been among the top 5 most popular European destinations from the main European markets during the pandemic (2020-22). (See also Annexes 2 and 4)
- Great resilience of willingness to travel in 2022 from the main European markets, but also internationally, despite the new variants, the exponential increase of cases and the strong fragmentation observed in travel regulations.
- GNTO launched three different main tourism promotion campaigns, one focusing on Sun and Sea (1st half 2021 – 2022), and the other two with a more "tactical" character geared towards activities in Nature and City Breaks (1st half of 2022 for the 1st time).
- For 2021, joint advertising agreements with 18 major airlines and 78 tour operators with a cost more than €10.5 million, and a parallel advertising campaign on dozens of digital media and platforms abroad, with a total budget of €12.6 million,
- Enhanced confidence among travellers in air travel between 2021 and 2020 to Greece from key markets (Great Britain, Germany, France, Greece, USA/ Canada and Nordic countries): Britons, Germans and Scandinavians mark the highest percentages.
- International geographic markets (Balkans) reachable by car with, in general, low- and medium-income levels.
- Large vouchers debt (from 2020) to the Russian market due to the bankruptcy of a certain Tour Operator.
- Structural restrictions in MICE and yachting organisation and growth.
- Preference by consumers from international markets for semi-private tourist packages as emphasis is placed on personal health and the need to reduce cost..

- Increased average per capita travel expenditure for visits to Greece in 2021 compared to previous years, but also to most competing destinations, along with the drop in the number of trips within the year.
- Partial lifting/ flexibility of travel restrictions for intra-European travel in the first months of 2021.
- Greece has a lower percentage of vaccinated persons in the general population than competing destinations such as Portugal and Italy, but the picture is significantly more favourable compared to Turkey and Egypt.
- Reduced interest in Health and Safety issues by travellers from the end of 2021 onwards, either because they consider safety as a given/trivial, or due to psychological and social fatigue.
- Very good positioning of Greece among all the main European markets in terms of Sun and Sea holidays, combined with both fun and relaxation, and calm.
- On the contrary, Greece – according to primary research data – is estimated to fall significantly short in terms of its positioning as a city break destination (throughout the year) but also for holidays in nature and outdoors, among all the main European markets. (See also Annex 6)
- Double percentage of Europeans travelling to Greece (in particular at the AIA) for more than 2 weeks in 2021 compared to 2019, and a slight increase as regards US and Canadian travellers.
- Stable and extremely low rate of COVID-19 reports in online discussions related to tourism and Greece, throughout 2021, according to social listening from the main international markets.
- Significantly greater interest in cultural tourism from the US, Canadian and Norwegian markets (compared to the other social listening markets under review: Great Britain, France, Germany, Greece, The Netherlands, and Sweden).

5.2.2. Competencies

Unique abilities or assets of the business that provide the basis for the provision and realisation of value to customers, and are critical to the creation of competitive advantage

- An important “legacy” from the successful management of the 1st stage of the pandemic and the official opening of the 2021 summer season (17/5/2021).
- Improved and very high satisfaction rates for most tourist products in particular, "Sunbathing", mild activities in “Nature” and "Food and Cuisine”, among travellers discussing holidays in Greece online. (See also Annexes 4 and 6)

- Improved and particularly high index regarding the sense of safety (2021 – 2019) for Greece among the main markets considered at social listening level. (See also Annexes 4 and 6)
- Very strong identity, mainly in terms of island tourist destinations (Region of Crete, Region of South Aegean) as shown by the performance of regional airports and the performance of tourist accommodation for 2021.
- Established as a top tourist destination, initially in Great Britain and France, as well as Italy, Germany, Belgium, Poland, and Austria, both based on 2020 data and according to the forecasts for the first half of 2022. (See also Annexes 2 and 4)
- Significant increase in arrivals from Poland, resulting in the country ranking in the top 6 markets for 2021, along with the increased average spend per night and the great interest of Poles for sun and sea as well as culture-related travel. (See also Annexes 2 and 4)
- High popularity of Greece among travellers from all the main European markets seeking relaxation and fun on the beach. (See also Annex 2)
- High popularity of Greece among travellers looking for immersive, unique, and local experiences from Germany, Austria, and Italy. (See also Annex 2)
- Increased satisfaction from mild activities in "Nature" in 2021 (compared to 2019), which is particularly significant (>10%) specifically from the Dutch, Swedish, Norwegian, and Canadian markets. The latter is an indication of the value of Greek nature since these are markets that have a correspondingly high value natural environment. (See also Annex 6)
- Recognising Greece as a destination of calm and relaxation, which is quite important during a pandemic since this is what European travellers are primarily looking for, which is also evident in the now very popular creative content (text and visual) of the GNTO's Expedia campaign ("I want to find peace", "I want to loosen up").
- Many areas (and a large part of the Greek territory) that are subject to an environmental protection and management status.
- Simplification of health and safety regulations (e.g. abolition of the PLF) on air travel to Greece.

5.2.3. Obstacles

Potential issues that could jeopardise the realisation of future prospects.

The profiles of specific international markets are analysed in Annexes 2 and 4, and of the Greek market in Annexes 2 and 5.

- Improved position for Croatia (1st half of 2022 compared to 1st half of 2021) as a popular tourist destination.

- Many competing destinations claiming a significant share of the German market (e.g. Italy, Egypt, Spain, Turkey, Croatia).
- Spain and Italy have consistently been the most popular destinations for the main European markets during the pandemic.
- Very high vaccination rate in Spain and Portugal.
- Portugal's leading position in purposeful travel ("Cant skip Hope" campaign), with digital nomads and road trips.
- Very strong communication positioning of Turkey as a Sun and Sea competitive destination with the "Turkaegean: Coast of Happiness" tourism campaign, focusing on Sun and Sea.
- International recognition for Croatia, with extremely dense and remarkable marketing and communication activity in 2021, continuous communication with its audiences and personalised, to the extent possible, communication, with an extremely limited budget since the Croatian National Tourism Organisation is funded exclusively by membership fees.
- Slightly reduced preference in air travel from main European markets, compared to 2019, which is the main means of transport to reach Greece.
- Tendency to limit the use of aeroplanes for very short journeys.
- Lack of information and data regarding travellers from Balkan countries and individual market segments such as the "digital nomads".
- Lack of documentation and proof points regarding the Sustainable Tourism Development in Greece narrative, at least in terms of the environmental performance of both the country as a whole and the individual tourist destinations, and therefore limited satisfaction among visitors from main European markets (mainly Britons, Germans and Poles) as sustainability is now an important factor for them when making travel purchases.
- Estimate for a relatively unfavourable positioning of Greece among travellers from Sweden since, while Greece ranks 2nd in preference for 2022, it ranks penultimate in terms of safety behind France, Italy, and Portugal. Meanwhile, a high percentage of Swedes say that they are increasingly influenced by the environmental impact when planning a future trip.
- British travellers (especially during their summer holidays), French travellers (during the winter holiday season) and generally travellers from Poland and The Netherlands looking for immersive, unique, and local experiences rank Greece lower than its competitors in their preference for their next trip.
- Although domestic travel is what supports the recovery of tourism internationally, Greek travellers continue to add very little value to Greek tourism since they are low-spend travellers, they greatly prefer international travel, and the main motivation to plan their next trip is discounts and offers.

- Strong preference and positioning of Greece as a Sun and Sea destination for the whole year among the main European markets (regardless of the short-term travellers' demand depending on the timing), so it is more difficult to enrich the brand with different kinds of experiences (city break, nature and outdoors) and reposition the Greek tourist product.
- Significantly reduced interest and popularity in terms of cultural experiences and activities in 2021 compared to 2019 among travellers from the main international markets discussing Greece, according to social listening.
- Improved but relatively low satisfaction rates for specific tourist products, in particular nightlife and family activities (e.g. theme parks and attractions related to educational activities).
- Leveraging Food and Cuisine (with emphasis on wine) especially for the US market, since this is the market showing heightened interest in this type of incentive and activity, according to social listening information.
- Leveraging Wellness, especially for the Norwegian market, since this is the market showing considerably greater interest than in 2019 for this type of incentive and activity according to social listening information.
- Drop in both popularity and satisfaction as regards Sun and Sea holidays among potential travellers to Greece from Norway (2021-2019).
- Lower levels of satisfaction for accommodation and hotels compared to competing destinations mainly in Spain and Italy.

5.2.4. Prospects

Opportunities that exist internally or externally to the business which can enhance sales and/or profits, through leveraging Unique Selling Points.

- Further penetration in Middle Eastern markets by expanding cooperation with airlines.
- Attracting the Greek diaspora from both long-haul and medium haul (European) markets and capitalising on a feeling of confidence, nostalgia (for friends and family) and the safety of non-Greeks who will travel with persons of Greek decent.
- Leveraging the Greek diaspora as ambassadors of specific destinations and possible development of reward programs for Greeks of the diaspora visiting Greece together with foreign citizens, possibly in collaboration with airlines.
- A very significant increase in requested slots for 2022 by airlines on islands, primarily in the Ionian Islands Region and the South Aegean Region.
- Enhance the cooperation share with airlines as regards the percentage of joint advertising.

- Enhance road tourism (either with private cars or small tourist buses) for northern and central Greece – by creating theme routes and/or approach/ special targeting/ communication campaign – in Central and Eastern European markets (e.g. Slovenia, Romania), in collaboration with National Roads concessionaires and operation companies.
- Further penetration in the up-and-coming Polish market, which has one of the highest levels of willingness to travel among main European markets. (See also Annexes 2 and 4)
- Positive prospects with the large increase in available airline seats for Greek destinations compared to 2019 (e.g. Transavia, JET2).
- Preparation of a National Strategic Plan for Tourism Development entitled "NATIONAL PACT ON SUSTAINABLE TOURISM 2021- 2030" and the financing of pilot destinations for the establishment of Destination Management and Marketing Organisations (DMMOs),
- Addition of many direct flights between Greece and the US for 2022, and connection with additional destinations apart from New York (e.g. Boston, Atlanta).
- Synergies with airlines that can bring visitors from long-haul markets to Greece with one stop. (See also Annex 2)
- Food and cuisine, cleanliness, and safety (along with luxury) are important factors of interest for US travellers, positioning Greece even higher in this market. (See also Annexes 4 and 5)
- Significant added value of Greece in the British market (even mainland destinations), since a very large percentage of Britons say that the mere feeling of the sun on their face is enough to improve their mood. (See also Annexes 2 and 4)
- Great increase of interest from Poles for city break trips in the 2nd half of 2021 for both Athens and Thessaloniki, and possible connection with Sun and Sea trips or remote work to extend the duration of stay, and with Greek gastronomy as well (according to GNTO google campaign) (See also Annexes 2 and 4).
- Opportunity to spread tourist flows in space and time by attracting Polish visitors, as they seem more willing among the main European markets to pay to visit less crowded destinations and travel off-season.
- Attracting a significantly larger share of solo travellers – particularly from Great Britain, France, Poland, and Austria – especially those with per capita travel expenditure over €2,000 (in total 21.3% of solo travellers, compared to 18.3% of people travelling with their family and 15.2% with their partner). (See also Annex 2)
- Capitalisation of the fact that "adventure and sports" record the biggest increase in popularity since 2021 compared to 2019, among travellers discussing going on holiday in Greece (except Russia). (See also Annexes 2 and 4)
- Heightened interest and popularity as regards mild activities in nature in 2021 compared to 2019, especially in Great Britain, France, and the US. (See also Annexes 2 and 4)

- Leverage the significant satisfaction increase as regards cultural tourism and holidays in nature.
- Further refinement of the content promoted through the Expedia campaign by promoting specific “moments” and experiences, prioritising the US, Canadian and Great Britain markets.
- Targeted support to MICE following the lifting of travel restrictions and help redirect tourist flows outside peak seasons and/or out of popular destinations.

5.2.5. Expectations | Positive and Negative Developments and Expectations

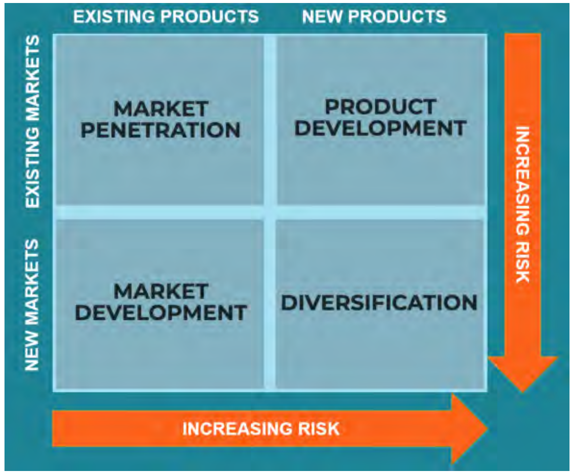
Predictions of future internal and external conditions that are likely to materially influence, positively or negatively, the delivery of plans to meet the identified prospects

- Further rise in popularity of competing destinations such as Croatia and Turkey, especially among specific target markets such as Germany and Russia* respectively. (See also Annex 1)
- Full lifting of travel restrictions and quarantine for intra-European travel.
- Significant deterioration of the health situation at European and national level with the new variant.
- Climate crisis incidents (e.g. forest fires) and poor relevant communication during the summer period have resulted in Greece's low environmental performance compared to the EU Member States making international headlines once again.
- Great demand for tier-1 tourist destinations during the summer season which jeopardizes the level of satisfaction with the tourist experience due to over-concentration of tourist flows.
- On the contrary, spread of demand either in time, for tier-1 tourist destinations, or in space for tier-2 tourist destinations, or both at the same time.
- Escalation of geopolitical developments and the war between Ukraine and Russia with negative effects on demand either from the main European markets, primarily as regards tourist destinations in Northern Greece, or from the US and Canada as regards the entire country (as they perceive the entire Eastern Europe as one single region) or both.
- Bankruptcy of a large Tour Operator – either internationally or nationally – and need to manage outstanding payments by consumers but also hotel liquidity problems.
- Drop in the purchasing power of European citizens and reduced budget for travel because of inflation and rising energy costs.

5.3. ANSOFF MATRIX

The ANSOFF matrix is a tool for analysing and designing an organisation's development strategies. This matrix relates to 4 development strategies while evaluating the levels of risk as shown below:

Table 7 Ansoff matrix (general presentation)



For the needs of this project, a variation of this tool has been used as seen in the tables below, which:

- presents individual geographic markets in 3 main categories: strategic markets (tier-1), priority markets (tier-2) and secondary markets (tier-3) and ranks them in terms of growth or maintenance strategies. (see also Annexes 1 and 2)
- analyses the intensity of marketing actions by geographic market and by
  - tourist product,
  - travel companion (with whom to travel)

It should be mentioned that markets that are either not mentioned or do not absorb any marketing intensity are:

- either markets with no strong interest for 2022-23 (e.g. China, India). For these markets, it is recommended to monitor developments.
- or markets with no data or information available to be included.

Table 8 Strategic targeting and intensity of marketing actions 2022-2023 | Interaction between main geographic markets and key tourist products

	Market strategy[26]	**Strategic markets (tier 1)**					**Priority markets (tier 2)**							**Secondary markets (tier 3)**						
		Growth			**Maintenance**		**Growth**			**Maintenance**				**Growth**						
		DE/ AT	FR	US	GB	IT	PL	IL	NORDICS[27]	CA	CH	BE	NL	BLK[28]	ES	AU	GR	JP	CN	IN
Strategy per tourist product	Sun and Sea	●	●	◕	●	◕	●	◕	◑	◔	◑	◑	◑	◑	◔	◔	◔	○	○	○
	City Break[29]	◑	◔	◑	◕	◔	◕	◔	○	○	○	◔	◔	◔	◕	◔	○	○	○	○
	Culture	◕	◕	●	◕	◕	◕	◔	◑	◑	◔	○	◑	○	◔	◔	◔	○	○	○
	MICE	◔	○	◔	◑	◔		○		○	○	○	◔	○	◔	○	○	○	○	○
	Food and Cuisine	◕	◔	◕	◑	◔	◕	◔	◔	◔	◔	○	◔	○	◑	◔	○	○	○	○
	Wellness	◔	○	◑	◑	○	○	○	◑	○	◑	○	◔	○	◔	○	○	○	○	○
	Outdoors/ Nature	◕	◕	◑	◕	◑	◑	○	◑	◑	◑	◑	◑	○	◔	○	◔	○	○	○
	Cruising	◔	○	◔	◑	○	○	○	○	○	○	○	◔	○	◔	○	○	○	○	○
	Yachting	◔	○	◔	◑	○	○	○	○	○	○	○	◔	○	○	○	○	○	○	○

[26] Intensity of marketing actions: None or very low ○, very high ●

[27] Sweden, Norway, Denmark

[28] Bulgaria, Romania

[29] if these tourist products are found to be priority products (either because the pandemic had a hugely negative impact, see city break, or, conversely, because of the opportunities created, see outdoors and nature), then the intensity of marketing actions could be increased by one level.

Table 9 Strategic targeting and intensity of marketing actions 2022-2023 | Interaction between geographic markets and market segment by type of travel/ travel companion

	Market strategy	Strategic markets (tier 1)					Priority markets (tier 2)							Secondary markets (tier 3)						
		Growth			Maintenance		Growth			Maintenance				Growth						
		DE/ AT	FR	US	GB	IT	PL	IL	NORDICS	CA	CH	BE	NL	BLK	ES	AU	GR	JP	CH	IN
Strategy by type of travel/ travel companion	Solo	◑	◑	○	◑	○	◔	○	○	○	◔	○	○	○	○	○	○	○	○	○
	Couples	◕	◕	●	●	◕	◕	◑	◔	NA	◔	◔	◑	NA	◔	◑	◔	○	○	○
	Families	●	◕	◑	◑	◕	◑	◑	◑	NA	◔	◔	◑	NA	◔	○	◑	○	○	○
	With friends	◕	◑	◑	◕	◑	◑	○	◑	NA	○	○	◔	NA	○	◑	◔	○	○	○
	Groups	◔	◔	○	◔	○	◔	◔	◑	NA	○	○	◔	NA	○	○	○	○	○	○
	With associates	○	○	◔	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○

6. STRATEGIC DIRECTIONS: THE 2022-2023 ACTION PLAN

This action plan leverages the research, analysis and synthesis of the data and information of the previous chapters, as well as the PESTLE and SCOPE strategic analyses.

The actions described relate to three fixed strands of tourism marketing strategy, those of (a) research and information, (b) development of tourist product and (c) promotion and communication.

As the strategy has a short implementation horizon (2022-2023), actions are proposed with the following three key features:

1. Be **targeted and specific**: in other words, it should be possible to plan and implement them within the given timeframe.
2. Have **added value**: that is, they should be fully adapted to the changes caused or accelerated by the COVID-19 pandemic, and to the special needs that have emerged for Greek tourism.
3. Be **innovative** in terms of Greek tourism: in other words, they should be actions that stakeholders have not been undertaking so far, and the pandemic is a good opportunity to develop them in a structured way.

Below follows a presentation of the different priority programmes, the title of each individual action, as well as the priority in terms of the implementation start date.

Note that since the description concerns a broad set of actions to adapt the national strategy to the pandemic, a timing prioritisation as regards the maturity and implementation start of these actions is recommended, as follows:

- High (further maturity to start immediately in the 1st half of 2022) as it is deemed that the need covered by these actions is not at all covered either by existing actions and/or other stakeholders.
- Medium (further maturity to start in the 2nd half of 2022) as it is deemed that the need covered by these actions is more or less covered either by existing actions and/or other stakeholders.
- Low (further maturity to start in the 2nd half of 2022 – 1st half of 2023) as it is deemed that the need covered by these actions is already covered to a great extent either by existing actions and/or other stakeholders.

Table 10 2022-23 Action Plan: Priority programmes and related actions

RESEARCH AND INFORMATION	**Time Priority**
PP 1 | Collecting data in programmatic time	
Social listening for Greece as a tourist destination	Medium
Market research on the willingness to travel to Greece	Medium
Market research on specific audiences: road tourism | "digital nomads"	Low
Passenger survey to assess the tourist experience	High
PP 2 | Public data to all	
Publication of outlook report on Greek tourism	Medium
Creation of an open data system	Low
TOURIST PRODUCT DEVELOPMENT	
PP 3 | Capitalizing on trends accelerated by the pandemic	
Full digitization of e-ticket | check-in in coastal shipping	Medium
Incorporation of augmented reality into outdoor cultural attractions and archaeological sites	Medium
Implementation of circular economy pilot/demonstration programmes	Medium
PP 4 | Boosting the tourist product for special audiences	
Design and development of branded theme road routes	Medium
Resolving structural constraints related to the development of MICE	High
Developing a signature experiences programme in Nature and Outdoors	High
PROMOTION AND COMMUNICATION	
PP 5 | Attracting added value audiences	
Develop the Brand Ambassadors campaign and programme for the Greek Diaspora	High
Develop a campaign for solo travellers	Medium
PP 6 | Spreading demand in space and time	
Boost the Sun and Sea campaign and communication actions in relation to mainland Greece	High
Boost the city destination campaign to reduce the environmental footprint	Medium
Develop a campaign for the signature experiences programme | road tourism.	Medium

6.1. RESEARCH AND INFORMATION

Throughout this project, there has been a strong need to boost research and information regarding the performance of Greek tourism in terms of public administration, with emphasis on information and data for more targeted and effective tourism marketing. Since in the short term, uncertainty will continue to remain high for many reasons (international relations, pandemic, climate and energy crisis, inflationary pressures) the collection, interpretation, and dissemination of data to both public administration bodies and tourism businesses is of great importance. Annexes 1 and 2, as an example of such research, provide information on the Competition and Main Markets for Greek tourism.

Apart from taking stock of past years, emphasis should also be placed on a 6 or 12 months forecast and outlook of Greek tourism.

6.1.1. Priority Programme | Collecting real time data

Annexes 1-6, apart from the research part of this report, serve as an illustrative example of the following actions.

6.1.1.1. Social listening for Greece as a tourist destination

Short description

Continuous assistance/ cooperation with specialised Big Data providers that record the online/ digital "discussions" regarding Greece as a tourist destination as well as the Greek tourist product, especially in relation to the main competitors, but also the improvement or downgrade trends compared to the previous time period.

In particular, the recommended themes for data collection are:

- Assessment of the feeling of safety both in relation to COVID-19 and in general.
- Assessment of the feeling of satisfaction in terms of tourist product, hotel, etc.
- Assessment of Greece's environmental performance as a sustainable tourist destination.
- Interest and satisfaction by individual tourist product, by geographic market and by age group.
- The spatial distribution of "discussions" depending on tourist product type.

It is recommended that data collection concern:

- strategic markets (tier-1) and priority markets (tier-2) for 2022-23, as described in a previous section of the report.
- main competitors: Spain, Italy, Portugal, Croatia, Turkey, and Egypt to allow benchmarking.

Special emphasis should be placed on the collection of data regarding the domestic (Greek) market for which data are lacking (except those specifically collected for the needs of this project).

Action Owner	Ministry of Tourism
Beneficiaries	Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level Local Government Organizations (LGOs)
Time priority	Medium

6.1.1.2. Market research on the willingness to travel to Greece

Short description

Specialised, rolling, online market research on willingness and sentiment as regards travel to Greece, among consumers from the main markets of Greek tourism with a six-month or annual forecast.

The themes to be probed could include:

- The time and place of their trip, as well as the alternative countries they see as possible destinations for their next trip.
- The type of trip they will take and their travel companion.
- The number of trips they plan to take during the year.
- The budget they intend to spend.
- Their concerns in relation to the pandemic (and other potential crises) as well as their key incentives to go ahead with a reservation and visit Greece.
- Their behaviour in terms of responsible travel and sustainable development.

It is recommended that data collection concern at least the strategic target markets (tier-1) for 2022-23, as described in a previous section of the report, as well as the Greek market.

It is also recommended that this be a rolling survey conducted at least every six months, as this will allow trend assessment and forecasting in the medium term.

Action Owner Ministry of Tourism

Beneficiaries Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs

Time priority Medium

6.1.1.3. Market research on specific audiences: road tourism | "digital nomads"

Short description Specialised, one-off market research on two specific audiences:

- consumers from the main markets of Greek tourism with road access (e.g. Bulgaria, Romania).
- "digital nomads".

The themes to be probed could include:

- Their intention to make such a journey.
- The time and place of their trip, as well as the alternative countries they see as possible destinations for their next trip.
- The type of trip they will take and their travel companion (with whom they will travel).
- The number of trips they plan to take during the year.
- The budget they intend to spend.
- Their concerns in relation to the pandemic (and other potential crises) as well as their key incentives to go ahead with a reservation and visit Greece.
- Their behaviour in terms of responsible travel and sustainable development.

It is recommended that road tourism data collection concern at least Romania and Bulgaria.

The research should initially be carried out on an ad hoc basis in cooperation with a specialised research company, which will also propose the research methodology.

Action Owner Ministry of Tourism

Beneficiaries Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs

Time priority High

6.1.1.4. Passenger survey to assess the tourist experience

Short description Adapting passenger surveys from airlines and international points of entry (both at AIA and at Regional Airports) to collect information and data in relation to the assessment of the tourist experience of visitors to Greece.

In particular, it is recommended to perform an assessment of the tourist experience in relation to their initial expectations, as regards the

- Sense of safety in relation to the pandemic
- Tourist experience by individual tourist product and activity (e.g. Sun and Sea, Food and Cuisine, Nature and Outdoors)
- Chances of visiting Greece again

It should be stressed that in the context of this project, the passenger survey questionnaires regarding the tourist experience have already been jointly revised for all airports, and the collection of information and data has started.

As far as AIA is concerned, data collection has started since February 2022 while the analysis and interpretation of the results will be carried out at the request of the UNWTO and the Ministry of Tourism.

Action Owner AIA | Fraport

Beneficiaries Ministry of Tourism, Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs

Time priority High

6.1.2. Priority Programme | Public data to all

6.1.2.1. Publication of outlook report on Greek tourism

Short description Preparation, and communication to the stakeholders involved with the Greek tourist product, of a briefing report containing the key information and data collected under the previous priority programme, their interpretation as well as main strategic directions to both individual destinations and tourism businesses.

It is recommended that this report follows a basic template that has been agreed beforehand, both with general information and with information by geographic market and by specific tourist product.

It is also recommended that this report be publicly posted on the Ministry's website.

At the same time, a webinar should be organised for stakeholders, to present the contents of each report and, in particular, the interpretation of the results.

Action Owner	Ministry of Tourism
Beneficiaries	Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)
Time priority	Medium

6.1.2.2. Creation of an open data system

Short description

Design and development of an open data system in collaboration with Big Data providers and research institutions with emphasis on the intelligible visualization of results with the use of Dashboards and Power Business Intelligence (Power BI).

The development of such a system offers the advantage of responding directly to the insights generation needs emerging each time, which are obviously different depending on the tourist destination's profile or the size and type of a tourism business.

The feasibility to integrate information and/or data ensuing from the Greek National Tourism Organization's digital tourism promotion campaigns should be investigated.

Two accessibility levels are recommended for the dashboard/Power BI:

- One basic, available to any legal or natural person.
- One specialized with more detailed information and data analysis capabilities, available to Public Law Legal Entities (NPDD) and legally

operating tourism businesses following a personalized connection to the system, possibly as a subscription service.

Action Owner	Ministry of Tourism
Beneficiaries	Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)
Time priority	Low

6.2. TOURIST PRODUCT DEVELOPMENT

As a main takeaway, this project reported very high levels both in terms of health and safety and in terms of satisfaction for the tourist product of Greece during 2021, which appears improved even compared to pre-pandemic levels (2019). (Annex 1, Annex 2, and Annex 4)

Nevertheless, the pandemic has brought to light some very significant changes in consumer preferences and concerns, as well as in the tourism offer, especially as regards individual tourist products, creating challenges and significant opportunities. The following priority programmes propose targeted actions to develop and enhance the tourist product.

6.2.1. Priority programme | Capitalizing on trends accelerated by the pandemic

6.2.1.1. Full digitization of e-ticket | check-in in coastal shipping

Short description

Digitalization of ticketing and check-in for all coastal shipping and domestic and international routes, according to air travel standards.

In particular, digitalization will include, among other things,

- Purchasing, issuing, and receiving e-tickets,
- Issuing electronic boarding passes,
- Checking boarding passes by personnel when entering the boat,
- Enabling ticket and itinerary cancellation and/or change,
- All support actions in terms of technical systems.

This action could be implemented in collaboration with technology companies and/or telecommunication service providers.

It should be mentioned that it is recommended that ferry companies continue to offer the option of issuing paper tickets, alongside e-tickets.

Action Owner

Ministry of Transport | Ministry of Digital Governance

Beneficiaries

Ferry Companies, Ministry of Tourism, Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)

Time priority

Medium

6.2.1.2. Incorporation of "augmented reality" into outdoor cultural attractions and archaeological sites

Short description Incorporation of Augmented Reality technology in cultural attractions and archaeological sites to enhance the relevant documentation and the visitors' immersive experience in outdoor and open spaces, which will also improve the sense of safety and personal health.

"Augmented reality" is a technology that introduces digital objects into the real world in real time. It's a kind of reality-based interactive environment that uses the capabilities of video, audio, text, and computer-generated effects to improve the actual user experience.

Recommended pilot projects include tier-2 cultural attractions (e.g. Tomb of Marathon) located near tier-1 tourist destinations (e.g. Athens – Attica).

This action could be implemented in collaboration with technology companies and/or telecommunication service providers and/or start-ups from the Greek ecosystem.

Action Owner Ministry of Culture | Ministry of Digital Governance

Beneficiaries Ministry of Tourism, Greek National Tourism Organization, Regional Tourism Board, Ministry of Tourism Thematic Working Groups, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)

Time priority Medium

6.2.1.3. Implementation of circular economy pilot/ demonstration programmes

Short description Integration of "circular economy" in the tourist product, and especially in hotel operations, with the implementation of innovative, pilot/demonstration programmes.

Circular economy is a production and consumption model, which includes the exchange, lease, reuse, repair, renovation and recycling of existing materials and products as much as possible to extend their life cycle. In practice, circular economy implies reducing waste to the minimum level possible. When a product reaches the end of its life, its materials remain within the economy in any possible way to be used again and again, adding value to the product.

Specifically, it is recommended to design and implement a programme for the reuse of specific hotel waste streams as raw material in another production activity.

To illustrate, it is possible to reuse bottle corks as insulating material in the construction of new hotel rooms or other communal areas (2 tons of cork material is estimated to be sufficient for the insulation of approx. 300 rooms with a total area 8,000 m^2, in the context of a relevant programme implemented by an international hotel chain). It is recommended that this action take place in tier-1 tourist destinations operating mainly with the Tour Operators model (such as Rhodes, Kos, areas of Northern Crete and Corfu), because of:

- The large number of hotel beds and guests.
- The considerable building activity in these destinations.
- The limited capacity of environmental infrastructure and connectivity, compared to the mainland.
- Their international reach in terms of communication.

Finally, it is recommended that this action be the subject of a specialized, international, branded tourism promotion campaign as a key (and innovative) “proof point” for Greece's commitment to sustainable tourism development.

Action Owner Ministry of Environment | Hellenic Chamber of Hotels

Beneficiaries Ministry of Tourism, Greek National Tourism Organization, Regional Tourism Board, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.), NGO, Real Estate Development Companies

Time priority Medium

6.2.2. Priority programme | Boosting the tourist product for special audiences

6.2.2.1. Design and development of branded theme road routes

Short description Design road routes in the form of a branded, structured, and poised tourist product to capitalize on the trend to boost road trips and the use of cars as a means of transport during holidays in the midst of a pandemic, and with emphasis on small groups of travellers (either as part of an organised trip from boutique Travel Agents, or as part of a Free Independent Trip).

It is recommended that these routes follow the storytelling technique and be distinguished according to:

- the kind of emotion they want to evoke for guests (e.g. calm and relaxation, adventure and escape, mystery)
- the tourist interest (e.g. culture, sun and sea, nature and outdoors, food and cuisine), and
- The duration of the trip/visit
- the season

and include, among others:

- the emblematic and recognisable landmarks ("hero assets") in the context of a core story
- signature experiences
- less-known landmarks, attractions and experiences, as "hidden gems"
- the main "ambassadors" and partners of each route (e.g. accommodation, restaurants, attractions, shops) that serve the "story" of each route.

It is recommended that these routes (with all relevant information) be presented in detail in specialized digital assets, as is the case with similar routes abroad.

Finally, it is recommended that this action be the subject of a specialized, international, branded tourism promotion campaign to targeted audiences from specific target markets (e.g. Romania, Bulgaria, Italy), possibly in collaboration with National Roads concessionaires and/or car rental companies.

Action Owner	Ministry of Tourism | Concessionaire | Ministry of Transport
Beneficiaries	Greek National Tourism Organization, Regional Tourism Board, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)
Time priority	Medium

6.2.2.2. Resolving structural constraints related to the development of MICE

Short description

- Create a special department at the Ministry of Tourism and the GNTO, dedicated exclusively to the development of MICE. This department must not undergo staff changes or policy changes. In cooperation with industry bodies and conference tourism professionals, the department's role will be to develop the industry, follow global market trends, be proactive, be the link between the State and the market, and engage in promotional activities preventing competition.
- Create a sub-brand for MICE GREECE which should become timeless
- Create modern promotional material (multimedia etc.) to compete for

international events and promote the country as a MICE destination

- Train the GNTO Services abroad on conference tourism-related issues and on how to support the work of attracting international events. The same should be done by Embassies and Consulates following the successful practice of competing destinations.

Action Owner Ministry of Tourism | GNTO

Beneficiaries 1^{st} and 2^{nd} level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.), DMCs, PCOs

Time priority High

6.2.2.3. Developing a signature experiences programme in Nature and Outdoors

Short description Develop a branded Nature and Outdoors "signature experiences" programme based on the strategy of the "Greece" brand as a tourist destination, to:

- Capitalise on the trends brought about by the pandemic in terms of preference for activities in Nature and the Outdoors, as well as less popular tourist destinations.
- Widen the perception of foreign visitors on what Greece can offer, apart from the "classic" "Sun and Sea" holidays.
- Support micro and small tourism enterprises
- Redirect tourist flows in space and/or time.

Specific recommendations:

- record and select specific and very specialized key experiences as a trademark of the Greece brand, that can exclusively be experienced there.
- Prepare experience development guides as a tourist product for destinations and tourist businesses.
- Develop a programme for the evaluation and approval of tourist products based on the specific signature experiences, and finance such experiences in terms of tourist promotion and sale through Travel Trade actions.

It is also recommended that this action be the subject of a specialized, international tourism promotion campaign to targeted audiences from specific target markets, both at B2C and Travel Trade level.

Action Owner	Ministry of Tourism | GNTO
Beneficiaries	Outdoor Activity Companies, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.),
Time priority	High

6.3. PROMOTION AND COMMUNICATION

6.3.1. Priority programme | Attracting added value audiences

6.3.1.1. Develop the Brand Ambassadors campaign and programme for the Greek Diaspora

Short description

Developing a tourism promotion campaign and a branded Ambassadors programme among the Greek diaspora, focusing on the US, Canadian and Scandinavian markets.

The campaign will include, among other things:

- the development of specific messages and creative content based on the values of confidence and nostalgia ("back home").
- The development of special digital assets
- ATL. BTL and digital communication (possibly via Bloomberg for the US market, under Bloomberg Home page takeover as well as Expedia)

This campaign can be carried out in cooperation with:

- The Ministry of Foreign Affairs and the local Greek Embassies
- Airlines with direct flights in the context of enhancing joint advertising.
- AIA and Fraport.
- Companies like VISA, MASTERCARD and AMERICAN EXPRESS (for discounts and offers, as in a similar 2021 GNTO campaign).

Action Owner GNTO

Beneficiaries Ministry of Tourism, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.),

Time priority High

6.3.1.2. Develop a campaign for solo travellers

Short description Development of a new, specialized (or adaptation of the existing) tourism promotion campaign especially for solo visitors, specifically from Great Britain, France, Poland, and Austria.

This campaign may focus on tier-2 and tier-3 tourist destinations as well as the mainland, from Q3 2022 and 2023.

The campaign will include:

- The development of specific messages and creative content (or the adaptation of existing ones)
- the development of special digital assets (or the adaptation of existing ones)
- ATL, BTL and digital communication

This campaign can be carried out in cooperation with:

- Airlines in the context of enhancing joint advertising.
- AIA and Fraport.

Action Owner GNTO

Beneficiaries Ministry of Tourism, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.),

Time priority Medium

6.3.2. Priority programme | Spreading demand in space and time

6.3.2.1. Boost Sun and Sea campaign and communication actions in relation to mainland Greece

Short description Boost the existing tourism promotion campaign in terms of content strategy and distribution of the tourism promotion budget for the whole of mainland Greece, in terms of the "Sun and Sea" experience, given:

- the very strong brand of Greek islands,
- and the possible restrictions in the management of tourist flows during peak months in these destinations ("over-tourism" phenomena).

According to AIA data,

- only 52% of Athens visitors visit the “Athenian Riviera”.
- 47% of those who don't visit it, don't even know it exists.
- 7 out of 10 can't remember the islands of the Saronic Gulf.

For 2022-23, this campaign may focus on Athens and Thessaloniki as well as tier-2 tourist destinations in mainland Greece with a good road connection (90-120’) from international points of entry (airports, ports). It can then be extended to cover more distant destinations.

Also, through Travel Trade with niche Luxury Travel Agents that will combine immersive experiences with Sun and Sea trips.

This campaign can be carried out in cooperation with:

- Airlines in the context of enhancing joint advertising.
- AIA and Fraport.
- Large Tour Operators that already serve tier-1 destinations (such as Crete and Rhodes) in the context of a central strategic agreement and ensuring a minimum number of flights to the mainland destinations.

Action Owner GNTO

Beneficiaries Ministry of Tourism, AIA, Fraport, Athens-Attica Hotels Association, 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)

Time priority High

6.3.2.2. Boost the city destination campaign to reduce the environmental footprint

Short description Boost the existing tourism promotion campaign for Athens and Thessaloniki to reduce the environmental footprint by:

- highlighting, in addition to the experiences that one can have in these destinations, mainly activities in Nature and Outdoors, as well as Sun and Sea, to help extend their stay in these destinations.
- Promoting the offsetting of CO2 emissions from air travel to Athens and Thessaloniki by developing, initially, an emissions assessment tool and participation in offsetting costs, in conjunction with a

possible "environmental-sustainable" certification of Athens as a tourist destination.

It should be stressed that since CO2 emissions offsetting is seen – by international NGOs – as a controversial method for effectively combating the climate crisis, the relevant campaign should stress that this action is part of the wider, long-term strategy to position Greece as a Sustainable Tourism destination.

This campaign can be carried out in cooperation with:

- Airlines in the context of enhancing joint advertising.
- "National" air carriers, as part of a joint programme and co-financing mechanism for the offsetting of CO2 emissions from air travel to Athens and Thessaloniki.
- AIA and Fraport (Thessaloniki Airport)
- Ministry of Environment | Green Fund

Action Owner Ministry of Tourism | GNTO | relevant DMMOs

Beneficiaries 1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)

Time priority Medium

6.3.2.3. <u>Develop a campaign for the signature experiences programme | road tourism</u>

Short description Development of tourism promotion campaigns for the two tourist product programmes mentioned in sections 6.2.2.1 and 6.2.2.3.

The campaign will include

- The development of specific messages and creative content (or the adaptation of existing ones), based on relaxation-related messages.
- the development of special digital assets (or the adaptation of existing ones)
- Digital communication, mainly through TripAdvisor (since the goal would have been to have already created a tourist product with activity providers) primarily, followed by Expedia (in terms of tourist accommodation).
- Seminars at regional level and intelligible information guides for tourism businesses that can leverage this.

	Particularly as regards signature experiences, it is recommended to place emphasis on solo travellers. These campaigns can be carried out in cooperation with: - As regards the signature experiences programme, with the relevant Regions - As regards road tourism, with the National Roads concessionaires
Action Owner	GNTO
Beneficiaries	1st and 2nd level LGOs, Industry Associations and Tourism Business Associations (e.g. hoteliers' associations, etc.)
Time priority	Medium

ANNEXES

ANNEX 1: RESILIENT PERFORMANCE, FRAGILE PROJECTIONS: GREECE AND THE COMPETITION

1.1. GREECE

According to the National Bank of Greece, in the period January-November 2021, **travel receipts rose by** €6,193 million **(144.6%)** to €10,477 million. The increase in travel receipts is due to the **increase** of both inbound travellers by 96.8% and **the average expenditure per journey** by 22.6%. The number of inbound travellers increased by 96.8% to 14,324 thousand[30]. According to the Institute of the Greek Tourism Confederation (INSETE), in 2020 the top markets in terms of arrivals were **Germany,** the **United Kingdom**, **France**, **Italy** and the **Netherlands**. Recent years have also seen a rise in arrivals from **Poland** which ranked 6th in 2020[31]. Finally, it is noted that due to health and geopolitical developments, **arrivals from Russia dropped significantly** in the period 2020-2021 (112,000 arrivals in 2021[32] compared to 806,000[33] arrivals in 2019).

In 2021, according to World Tourism Organisation data, there were a total of 15 million international arrivals, a 53% drop compared to 2019 when there had been 31 million international arrivals. In 2019, international travel receipts amounted to USD 20.4 billion, accounting for 29% of exports. In 2020, this figure dropped to 11% and USD 4.9 billion respectively.[34] Interestingly, according to the European Travel Commission, Greece has maintained its momentum as **one of the 5 recommended destinations for Europeans throughout the pandemic**, regardless of the changing seasons and epidemiological developments[35]. Predictions are optimistic for 2022 as the appetite for travel is constantly strengthened with **7 out of 10 Europeans** stating that they will **make a trip in the first half of 2022** regardless of current health developments and the emergence of the Omicron mutation[36]. The positive outlook for Greece is also reflected in the announcements of the Ministry of Tourism regarding **50% increase** compared to 2019 in **Transavia** (according to the GNTO) airline seats available for Greek destinations, as well as in the **increase** in the **British JET2** airline seats by **600,000** (according to the Ministry of Tourism) available in 2022 compared to 2019. Finally, as of the beginning of April 2022, 13 flights from **the USA** will start **–** 14 including Emirates airlines which operates all year long. Overall, the Greek Minister of Tourism has stated that he estimates a 30%-50% increase in available

[30] Bank of Greece, Developments on Travel Balance of Payments: November 2021, January 2022
[31] INSETE, International Air Arrivals: 2019-2020 Part A – Report, March 2021
[32] https://www.bankofgreece.gr/enimerosi/grafeio-typoy/anazhthsh-enhmerwsewn/enhmerwseis?announcement=aa50cede-072e-407e-9c4e-33aa1813f7a1
[33] https://insete.gr
[34] UNWTO, Tourism Dashboard – Inbound, available here
[35] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel waves 1-10
[36] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel waves 10

airline seats for 2022 compared to 2019. According to the Research Institute for Tourism (RIT) of the Hellenic Chamber of Hotels (HCC), 36% of Greek hoteliers have signed **contracts with tour operators for 2022** of which **70% at the same prices as in 2021**[37]**.** Finally, **TUI**[38] senior executives have stated that in the next tourist, the group will exceed the **3-million visitor milestone in Greece**, which had been reached in 2019[39],

In July 2020, the Ministry of Tourism launched the website **'Destination Greece. Health First'**[40] in order to provide visitors with information about the healthcare measures and protocols implemented by the country, as well as the rules that apply to the travels to and from Greece. The website is available in 6 languages (**Greek, English, German, French, Italian, Russian**),

In May 2021, the Greek National Tourism Organization (GNTO) announced a central campaign for the summer season that would run in Europe and America, with a total budget of €22.9 million. In this context, **joint advertising agreements** were concluded with 18 major **airlines** and 78 **tour operators** amounting to over €10.5 million. At the same time, an advertising campaign was conducted on dozens of foreign digital media and platforms, with a total budget of €12.6 million. The digital promotion campaign included videos presenting key tourist products/experiences offered by the destination (Sun and Sea, gastronomy, culture, etc.) the central message being **'All You Want Is Greece'**[41]**.**

In December 2021, GNTO announced the implementation of a **winter tourism campaign** with the central message "Greece does have a winter", aimed at promoting Greek continental destinations and the experiences offered in the mainland (outdoor activities, adventure activities, gastronomy, etc.). The campaign ran for four months and targeted, among others, the **UK, Germany, France, Italy, Spain, Denmark, Sweden, Poland, and Israel**. Interestingly, this is the **first time** Greece has attempted a more **intense promotion of winter travel experiences** in foreign markets. Finally, it is noted that the winter campaign adopted a rather humorous approach as a follow-up of the core campaign "All You Want Is Greece"[42].

According to the Ministry of Tourism, the 2022 tourist season is expected to be more reinforced in terms of tourist flows in the **end of March - beginning of April** focusing, among other things, on **city breaks** – especially in Athens and Thessaloniki –, a **longer tourist season** and the promotion of **less known destinations**[43]**.** Finally, the Annual Action Plan 2022[44] of the Ministry of Tourism provides for the preparation of a National Strategic Plan for Tourism Development entitled "NATIONAL PACT ON

[37] RIT, The Performance of Greek Hotels in 2021, January 2021
[38] https://mintour.gov.gr/symfonia-vasili-kikilia-me-anotata-stelechi-tis-tui-gia-enarxi-drastiriotitas-stin-ellada-to-martio-toy-2022-sto-epikentro-i-athina/
[39] Ministry of Tourism of Greece, Agreement between Minister Vassilis Kikilias and senior executives of TUI on the start of activity in Greece in March 2022 – Athens in focus, October 2021
[40] https://greecehealthfirst.gr/
[41] GNTO - D. Fragakis: GNTO is running one of the largest promotion programs ever, May 2021
[42] GNTO, "Greece DOES have a winter"- GNTO's Dynamic Campaign for Winter Tourism in Mainland Greece, December 2021
[43] GNTO, V. Kikilias at ANA-MPA: We place emphasis on city breaks and high end tourism and shed light on less known destinations, October 2021
[44] https://government.gov.gr/wp-content/uploads/2021/12/yp_tourismou_2022.pdf

SUSTAINABLE TOURISM 2021-2030" and the **financing of pilot destinations for the establishment of Destination Management and Marketing Organisations** (DMMOs)[45],

[45] Ministry of Tourism of Greece, Annual Action Plan 2022 – Executive Summary, December 2021

1.2. THE COMPETITION

1.2.1. Spain

In 2021, according to World Tourism Organisation data, there were a total of 31 million international arrivals, a 63% drop compared to 2019, when there had been 84 million international arrivals. In 2019, international travel receipts amounted to USD 79.7 billion, accounting for 16% of exports. In 2020, this figure dropped to 5% and USD 18.5 billion, respectively[46]. According to the Spanish National Statistical Institute, in the first 11 months of 2021 **international arrivals** rose to **28.2 million**. Approximately 41% travelled with a holiday package and 57.5% independently. The main markets for this period in order of arrivals were **France (5.3 million, 42% increase from 2020), Germany (4.8 million, 107.5% increase from 2020) and the United Kingdom (3.9 million, 27.6% increase from 2020).** The 3 most popular destinations were the **Canary Islands** (with the majority of visitors being **British and German**), **Catalonia** (with the majority of visitors being **French and other Europeans**) and **Andalusia** (with the majority of visitors being **British and Scandinavian**). Travel receipts for the first 11 months of 2021 **exceed €31 million**. Finally, in November 2021 the Average Length of Stay was **7.8 days** and the Average Per Capita Expenditure was **€1,119[47].**

According to the European Travel Commission (ETC), Spain has maintained its momentum as one of the **3 recommended destinations** for Europeans **throughout the pandemic**, regardless of the changing seasons and epidemiological developments. This demonstrates the **resilience of the tourist brand** of the destination[48].

In 2020, Spain's Minister of Tourism introduced the **renewed website** of the tourist destination and the **'Back to Spain' campaign**, which uses photos and videos to emphasize the **emotional "bonding" of those who travel frequently to the country** (repeaters), as surveys demonstrate that **50% of visitors** have travelled to Spain more **than 10 times**. The campaign includes **10 different concepts** that highlight Spain's **main tourist products** such as nature, gastronomy and cultural heritage[49].

In May 2021, the 'You deserve Spain' campaign was launched for the **summer season** to market Spain as the destination that is synonym for **trust, safety and quality.** This campaign also targets mainly repeaters and key and emerging markets (UK, France, Germany, Italy, Belgium, Sweden, Netherlands and Poland). The campaign was **mainly digital** and ran between May and July 2021, but in **some countries** (UK, France, Germany) was complemented by **printed and outdoor advertising** (OOH, billboards, video screens, buses, magazines and newspapers). The campaign combines **one's experience at home in the midst of the pandemic and lockdown** with the emotion one can experience in the **same conditions at the destination** to overcome 3 challenges: decide to travel, do it abroad and, finally, choose Spain for their holidays. The target audiences were **young people, families, adults**

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[46] UNWTO, Tourism Dashboard – Inbound, available here
[47] INE, Tourist Movements on Borders (FRONTUR), January 2022
[48] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel waves 1-10
[49] Spain.Info, YouTube: https://www.youtube.com/c/spain/videos

without children and pensioners marketing various tourist products (Sun and Sea, nature, golf, etc.). The campaign **includes customised versions** for the **popular destinations** in Spain (e.g. Your family deserves the Balearic Islands / Vous méritez l'Andalousie)[50].

The campaign continued in October 2021 with new videos that focus on the **autumn and winter period** (city break, wine tourism, cultural heritage) and highlight the **nice weather and sunshine** (need to go back to summer/Canary Islands).[51] Finally, in January 2022, the Spanish Ministry of Tourism presented in FITUR the 3 key priorities for the transformation of the tourist destination into the new conditions: **quality, digital transformation and sustainable development**[52].

1.2.2. Italy

Italy is one of the countries most affected by the COVID-19 pandemic. In 2021, according to World Tourism Organisation data, there were 26 million international arrivals, a 59% drop compared to 2019 when there had been 65 million international arrivals. In 2019, international travel receipts amounted to USD 49.6 billion, accounting for 9% of exports. In 2020, this figure dropped to 4% and USD 19.8 billion, respectively[53]. In 2020, the top 5 international markets in order of arrivals were **Germany** (25%), **France** (11%), the **United Kingdom** (9%), **Austria** (7%) and **Switzerland** (6%). In 2020, foreign travellers spent a total of USD 19.8 billion and domestic travellers USD 82.1 billion, respectively[54].

According to the European Travel Commission (ETC) Italy has maintained its momentum as one of the **3 recommended destinations** for Europeans **throughout the pandemic**, regardless of the changing seasons and epidemiological developments. This demonstrates the **resilience of the tourist brand** of the destination[55].

In November 2021, the Italian government launched a **nation branding campaign** aimed at enhancing the visibility of 'Made in Italy' and supporting exports and the extroversion of the Italian economy. With the title 'Italy is simply extraordinary: beIT[56]', the campaign targets 26 countries, is mainly **digital** via a special website, promotional videos and social media actions and consists of 2 phases. Until March 2022, the **main values** that define Italy around the world are showcased: **creativity, passion, heritage, style/aesthetics, innovation and diversity**. In the second phase, until August 2022, the campaign will focus on the promotion of Italian brands and "Made in Italy" products in each of the 26 countries. The campaign will be joined by leading representatives of 'Made In Italy', while **for every 10,000 campaign views a tree will be planted** in Italy. It is noted that by January 21, 2022, the

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[50] Ministerio de Industria, Comercio y Turismo, Te mereces España, la nueva campaña de TURESPAÑA para atraer turistas internacionales, May 2021

[51] Spain.Info, YouTube: https://www.youtube.com/c/spain/videos
[52] Ministero de Industria, Comercio y Turismo, FITUR 2022, escaparate del nuevo modelo turístico español, January 2022
[53] UNWTO, Tourism Dashboard – Inbound, available here
[54] World Travel and Tourism Council, Italy - 2021 Annual Research: Key Highlights, April 2021
[55] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel waves 1-10
[56] https://madeinitaly.gov.it/en/

campaign had reached approx. 5.7 million views and 574 trees had been planted[57] (sustainability, transparency, target-setting)[58].

In November 2021, Italy's National Tourism Organisation launched the destination's new 'Make It Real' tourist campaign. The campaign is deployed in digital environments and aims at digital advertising (YouTube, Display, Facebook, Instagram), **user generated content** and partnerships with influencers. The campaign will run for 4 months and, using **humour and the strong desire for travel**, aims to encourage users to plan a trip to Italy with an innovative and robust approach.

Under the slogan 'Make IT Real' and the message 'Italy is better in Italy', the campaign uses videos and photos to compare (occasionally frustrating) Italian experiences in one's own country to those that one could live in Italy. The objective is to highlight both the beauty and culture of the country as well as the fact that Italy is **part of everyone's daily life**, from food to Formula 1. Users can generate **their own "Make IT Real" moments** on the campaign website[59] uploading their own photos or videos and adding a real element of the destination that can then be shared in the social media (interaction, personalization). It is noted that the campaign runs heavily in Australia and New Zealand[60], among others.

1.2.3. Croatia

In 2021, according to World Tourism Organisation data, there were 11 million international arrivals, a 39 % drop compared to 2019 when there had been 17 million international arrivals. In 2019, international travel receipts amounted to USD 11.8 billion, accounting for 35% of exports. In 2020, this figure dropped to 21% and USD 5.6 billion, respectively[61]. According to the Croatian National Tourism Board, the key markets for 2021 in order of arrivals were **Germany (2.9 million, 84% increase from 2020), Slovenia (1.2 million, 18% increase from 2020), Austria (1.1 million, 180% increase from 2020), Poland (1 million, 50% increase from 2020) and the Czech Republic (775,000, 50% increase from 2020)[62].**

In March 2021, a dedicated **Health and Safety website** titled 'Safe Stay in Croatia' was launched, containing useful information for visitors and related promotional videos. The website also includes **a special form to enter** comments or complaints **about whether COVID-19 protocols are adhered to or not** by tourism businesses (**accountability**)[63]. Between May and July 2021, Croatia ran a tourism marketing campaign focusing on the **safe destination** and targeting **12 markets** (Germany, Slovenia, Austria, Italy, Poland, UK, Czech Republic, Hungary, France, Netherlands, Slovakia and Russia). With the central slogan "Trust me, I've been there", 12 videos promoting different **tourist products in line**

57 https://madeinitaly.gov.it/en/treedom/
58 Embassy of Italy in Hanoi, "Italy is simply extraordinary: beIT", November 2021
59 https://make-it-real.com.au/
60 Smith Brothers Media, https://smithbrothersmedia.com.au/projects/italian-national-tourism-board/
61 UNWTO, Tourism Dashboard – Inbound, available here
62 Croatian National Tourist Board (CNTB), In 2021, nearly 14 million tourists visited Croatia, January 2022
63 Croatia Full of Life, https://www.safestayincroatia.hr/en

with the preferences of each market (e.g. Sun and Sea for the Germans and culture for the French) are shot as testimonials of people who have already visited Croatia and have lived these experiences (**trust and transparency**). It is noted that the testimonials are in the respective **native language** of each visitor (e.g. English, French, German, Slovak). The campaign included content with a similar concept on social media, printed advertisement and banners, as well as a special section on the destination's website[64].

In October 2021, the Croatian National Tourism Board launched a campaign to **recognise/reward those who visited** Croatia in 2021 under the title "Thank you for your trust". The campaign ran on **social media** and markets where the **largest number of arrivals** originated for the year (Germany, Slovenia, Poland, Austria, Czech Republic, Hungary, Slovakia, Italy, Netherlands, France). As a follow-up of the "Trust me, I've been there" campaign, the "Thank you for your trust" campaign consists of **actual photos and testimonials** of personalities and influencers from these markets who visited Croatia in 2021 as well as Croatian famous athletes who chose to travel within the country (**authenticity and trust**). The campaign is aimed to enhance the visibility of the destination in these markets and target travellers who will return to the destination (**repeaters)**[65]**.**

Between November 2021 and January 10, 2022, Croatia ran a campaign for **winter tourism** and targeted **14 markets** (Germany, Slovenia, Austria, Poland, Czech Republic, Slovakia, Hungary, Italy, Netherlands, France, Great Britain, Belgium, Sweden and Norway)." The campaign ran on social media (Facebook, Instagram, Twitter, TikTok, Pinterest) and aims at enhancing the visibility of the destination and marketing tourist products such as **wellness, wine tourism, culture and nature**. The campaign also includes photo contests with prizes (giveaways) in the target markets, influencer visits, content with a similar concept on social media, printed advertisements and banners, as well as a special section on the destination's website[66].

As reported by the European Travel Commission (ETC), Croatia had extremely **dense and remarkable** marketing and communication activity in 2021. Much as the aesthetics and overall look and feel are not of the same high standard across campaigns (as the budget of the Croatian National Tourist Board comes almost exclusively from the private sector), it is generally a dynamic strategy that creates the image of an open, safe and well-prepared destination that **constantly speaks** to its audiences adopting a **communication as personalized** as possible.

1.2.4. Portugal

Tourism is a priority productive sector in Portugal's development strategy. In 2020, according to World Tourism Organisation data, there were 6 million international arrivals, a 74 % drop compared to 2019 when there had been 25 million international arrivals. In 2019, international travel receipts amounted

[64] Croatia Full of Life, https://croatia.hr/en-GB/trip-ideas/trust-me-i-have-been-there
[65] Croatian National Tourist Board (CNTB), New CNTB campaign includes well-known Croatian athletes, October 2021
[66] Croatian National Tourist Board (CNTB), CNTB launched new winter campaign "Croatia- Winter Wonderland", November 2021

to USD 20.5 billion, accounting for 24% of exports. In 2020, this figure dropped to 13% and USD 8.8 billion, respectively[67]. In 2020, the top 5 international markets in terms of arrivals were **Germany** (19%), **France** (13%), the **United Kingdom** (11%), **Austria** (9%) and **Switzerland** (5%). In 2020, foreign travellers spent a total of USD 8.2 billion and domestic travellers USD 5.8 billion, respectively. [68] According to the Government of the country, every €1 of travel expenditure corresponds to €0.79 of added value to the country's economy – a contribution higher than the European Union average (€0.59 per €1). In the first 11 months of 2021, there were 39.9 million overnight stays and 5.4 million **international arrivals** with an **Average Length of Stay of approximately 3 days**[69].

In May 2021, the government published an Action Plan aimed at supporting the sector against the effects of the pandemic and entitled "Plano Reativar o Turismo | Construir o Futuro" (Reactivate Tourism | Building the Future). The Action Plan is based on **4 pillars** (supporting companies, promoting safety, generating business, building a future), has a **total budget of €6.12 million** and aims to **exceed €27 million in travel receipts in 2027**. [70] At the level of pandemic management, the Portuguese brand is estimated to be extremely strong as it is **the country with the highest vaccination rates in the EU**, with 88.8% of the population having received at least 1 dose and 81.9% having been fully vaccinated[71].

In terms of tourism resources and products, it is noted that Portugal is one of the **best golf destinations in Europe**. At the same time, the country offers a **special visa for remote workers/digital nomads** while Madeira hosts the **Madeira's Digital Nomad Village**[72], one of the first ventures to attract digital nomads in collaboration with a public organization in Europe. According to Statista, Portugal was the **Europe's best country for road trips** in 2021.[73] Finally, in the autumn of 2021, it introduced a specialized wine tourism experience platform and a marketing video aimed at establishing the country as a **top wine tourism destination** worldwide[74].

In 2020, Portugal launched the "**Can't Skip Hope**" campaign, which was created by professionals while remote working and is one of the **best-known and successful** tourism campaigns in the light of the COVID-19 pandemic. Amidst a complete halt to travel, the campaign was aimed to maintain Portugal's visibility as the dream destination for all postponed travel plans (**empathy**, hope). It is the follow-up of the successful campaign 'Can't Skip Portugal', which ran for 2 years (2017-2019), with a budget of €20 million for 20 markets (UK, Germany, France, Spain, Brazil, USA, China, Russia, Canada, India, Norway, Denmark, Poland) and organic marketing in 200 countries. The **shooting** of the 'Can't Skip Portugal' campaign took place **in December** with a view to highlighting the **mild temperatures** and **sunshine** that visitors can experience all year round at the destination. In 2020, the ' # TuPodes – Visit a lot for a little' campaign was also launched to target Portugal's **domestic audiences**. In the context of supporting the tourism sector, **the government funded 50% of the cost of a series of experiences** inviting the Portuguese people to make reservations via the Visit Portugal website. **'Can't Skip**

[67] UNWTO, Tourism Dashboard – Inbound, available here
[68] World Travel and Tourism Council, Portugal - 2021 Annual Research: Key Highlights, April 2021
[69] INE, Tourist activity maintained growth in November, but decreased compared to the same period in 2019, January 2022
[70] Turismo de Portugal, Plano de Ação "Reativar o Turismo | Construir o Futuro", May 2027.
[71] European Center for Disease, Prevention and Control, COVID-19 Vaccine Tracker, Accessed on 13/12/2021
[72] https://digitalnomads.startupmadeira.eu/
[73] Statista, Best countries for road trips in Europe in 2021, September 2021
[74] Visit Portugal, Portugal Wine Tourism: https://www.portuguesewinetourism.com/

Tomorrow' was launched in early 2021 and focuses on promoting **responsible and sustainable tourism** as well as changing the way people travel. In the summer 2021, Visit Portugal ran the '**Time to Be**' campaign for the international and domestic markets. It was intended to stimulate demand and keep the destination at the top of preferences by highlighting its USPs[75].

It is noted that the Visit Portugal campaigns have had **continuity and consistency** in terms of look and feel, message and overall strategy for many years (2017-2021). At the same time, strategic goals such as **sustainable and responsible development, support for local economies and communities** and the **position** of the destination on current issues and claims (sustainability, brand purpose, over tourism etc.) are highlighted and characterised by a harmonious combination of **emotion and reason** (empathy).

1.2.5. Turkey

In 2021, according to World Tourism Organisation data, there were a total of 30 million international arrivals, a 42 % drop compared to 2019, when there had been 51 million international arrivals. In 2019, international travel receipts amounted to USD 29.8 billion, accounting for 17% of exports. In 2020, this figure dropped to 7% and USD 10.2 billion, respectively[76]. According to the Turkish Ministry of Culture and Tourism, the main markets for 2021 in order of arrivals were **Russia (20%), Germany (13%), Ukraine (8%), Bulgaria (5%) and Iran (4%)** [77]. In the period January – October 2021, **travel receipts** amounted to **USD 20.3 billion**, with USD 16.4 billion coming from international travellers, and 3.1 billion from Turks living abroad. At the same time, the **Average Per Capita Expenditure** increased from **USD 621 to USD 679** for foreign visitors and from USD 646 to USD 704 for Turks living abroad[78]. It is also noted that as the British Government had placed the country on the red list until September 2021[79], the United Kingdom is absent from the five countries of arrivals.

In December 2021[80], the country's **brand name was changed** from **Turkey** to **"Türkiye"** and was first applied on the tourism website of the destination. [81]It is assumed that the aim of the President of the Republic of Turkey, Recep Tayyip Erdogan, is to halt the discussions on the crisis in the country's economy and the devaluation of the Turkish lira.

In July 2021, the tourism campaign "**Turkaegean: Coast of Happiness**" focused on the **Sun and Sea**, gastronomy experiences, water sports and culture on the Turkish coast. The main video of the campaign is rather self-explanatory, while there is nothing imaginative in the script to call viewers to action. It is noted that the overall aesthetics of the video and the campaign (music, locations, activities,

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[75] Visit Portugal, YouTube https://www.youtube.com/c/visitportugal/videos
[76] UNWTO, Tourism Dashboard – Inbound, available here
[77] Ministry of Culture and Tourism, Border Survey: https://www.ktb.gov.tr/EN-249298/border-statistics.html
[78] Central Bank of the Republic of Turkey, Balance of Payments Report, https://www.tcmb.gov.tr/wps/wcm/connect/2c897137-850e-4d15-9a2a-c0d4735d9986/bop.pdf?MOD=AJPERES&CACHEID=ROOTWORKSPACE-2c897137-850e-4d15-9a2a-c0d4735d9986-mkyEETK
[79] https://www.gov.scot/news/international-travel-restrictions-to-be-relaxed-and-simplified/
[80] https://www.resmigazete.gov.tr/eskiler/2021/12/20211204-5.pdf
[81] Republic of Turkey, Presidential Decree 2021/24, December 2021

storytelling) could **refer to Greek destinations –** which is deemed to have been the overall target of the campaign. The campaign also includes the creation of a special website (https://goaeelderurkiye.com/) showcasing all the experiences a traveller can enjoy in the 'Aegean Türkiye' destinations and the development of social media content. In October 2021, Turkey's new tourism campaign titled '**Istanbul Is the New Cool'** was launched, aiming at the **city break** (*48 hours in Istanbul*) and the promotion of Istanbul. The overall campaign aesthetics is fresh and dynamic with bold fonts and colours, while young people were involved in the generation of the content. It is noted that the video is characterized by the human element, joyful and lively music and an effort to demonstrate a population diversity, basically intended for younger generations of travellers (millennials and Gen Z). The video caused strong reactions on the social media regarding the presentation of an embellished version of the actual situation with social media users creating similar satirical videos. The campaign also includes the creation of a special website (https://goistanbulturkiye.com/) showcasing all the experiences a traveller can enjoy in Istanbul and the development of social media content.

1.2.6. Egypt

According to the Egyptian Ministry of Tourism, between January and June 2021 3.5 million travellers arrived in the country from abroad and the travel receipts reached USD 3.5-4 billion for the same period. The **Average Expenditure per Day** is estimated by the Ministry at **USD 90** for the same period[82]. In 2020, according to World Tourism Organisation data, there were a total of 4 million international arrivals, a 72 % drop compared to 2019, when there had been 13 million international arrivals. In 2019, international travel receipts amounted to USD 13 billion, accounting for 27% of exports. In 2020, this figure dropped to 12% and USD 4.4 billion, respectively[83]. In 2020, the top 5 international markets in arrivals were **Germany (14%), Saudi Arabia (9%), Libya (6%), Italy (5%) and Poland** (4%). Interestingly, the United Kingdom is absent from the five top places (Egypt was on the red list of the British Government) while in 2019 it held the 3rd place of international arrivals with 5%[84]. It is estimated that for 2021 and the forthcoming years **Russia will return as one of Egypt's main markets** as in August 2021 Russia allowed the resumption of direct flights to the Red Sea resorts and the rest of the country, which had been suspended since 2015 after a plane crash (Metrojet Flight Crash)[85].

In December 2021, the Egyptian Ministry of Tourism announced the country's tourism campaign for the winter 2022 titled "**Sunny Christmas**" and targeting **Germany, UK, Ukraine, Italy, France, Russia and the US**. The campaign is digitally promoted via Google Ads and social media ads (Facebook,

[82] Reuters, Egypt's January-June tourism revenues were $3.5-4 bln - deputy minister: https://www.reuters.com/world/middle-east/egypts-january-june-tourism-revenues-were-35-4-bln-deputy-minister-2021-07-04/
[83] UNWTO, Tourism Dashboard – Inbound, available here
[84] World Travel andTourism Council, Egypt 2021 Annual Research: Key Highlights, 2021
[85] State Intelligence Service of Egypt (SIS), Resumption of Russian tourism to boost Egypt foreign currency resources -- Goldman Sachs, https://www.sis.gov.eg/Story/155140/Resumption-of-Russian-tourism-to-boost-Egypt-foreign-currency-resources----Goldman-Sachs?lang=en-us

Instagram, TikTok, Snapchat)[86]. Apart from the promo videos, the campaign also includes social media content and aims to **link** the country's 2 key tourist products – **Sun and Sea** with **Culture and Heritage**. In the context of the campaign, 4 versions of the '**Sun and Sea'** promotional video (28'', 16'', 8'', 5'') were uploaded on the YouTube account Experience Egypt on 25/12/2021; the slogan was 'Winter is coming. Time to tan!' and 'The Red Sea awaits'. The videos are available with subtitles in 5 languages (Russian, Italian, English, French, German)[87]. It is noted that the videos highlight the **nice weather**, the **human element** focusing on **fun/joy**, drone shots and the joyful music. Finally, it is deemed that the videos are rather self-explanatory (Sun and Sea, sports activities), could refer to other destinations, and there is nothing imaginative in the story to differentiate the destination from its competitors.

In 2021, the government of the country organized two **impressive large-scale public celebrations** to enhance Egypt's tourist reputation by promoting cultural heritage, new infrastructure and recent archaeological restoration projects. Specifically, in April 2021, the "Pharaohs' Golden Parade" was organized and broadcast live; 22 mummies of Kings and Queens of the New Kingdom of Ancient Egypt (including Ramses II and Hatshepsut) were transferred from the Egyptian Museum of Cairo to the new National Museum of Egyptian Civilization with a total area of 135,000 sq.m.[88] In November 2021, there was the reopening of the Avenue of Sphinx, the world's largest open-air museum aged 3,000 years[89]. The two events included **direct references to Ancient Egypt** and were characterized by their large scale and **cinematic approach**. Their aim was to stir interest in the destination and create positive publicity[90] to attract international travellers. Finally, it is noted that the Egyptian Ministry of Tourism and Antiquities has turned to **digital tools** with emphasis on the modern style of its website[91] offering virtual tours[92] to important monuments of the country in light of the COVID-19 pandemic, and digital marketing through social media campaigns and hosting of Influencers[93].

1.2.7. Cyprus

In 2021, according to World Tourism Organisation data, there were a total of 2 million international arrivals, a 51 % drop compared to 2019 when there had been 4 million international arrivals. In 2019, international travel receipts amounted to USD 3.3 billion, accounting for 18% of exports. In 2020, this

[86] Egyptian Government, Ministry of Tourism and Antiquities, Twitter: https://twitter.com/TourismandAntiq/status/1474310076777250816?ref_src=twsrc%5Etfw%7Ctwcamp%5Etweetembed%7Ctwterm%5E1474310076777250816%7Ctwgr%5E%7Ctwcon%5Es1_&ref_url=https%3A%2F%2Fwww.arabnews.com%2Fnode%2F1992666%2Ftravel
[87] Experience Egypt, YouTube Channel: https://www.youtube.com/c/ExperienceEgypt/videos
[88] Egyptian Government, Ministry of Tourism and Antiquities, The Pharaohs' Golden Parade: https://egymonuments.gov.eg/en/subportals-group/the-egyptian-museum/the-egyptian-museum-whats-on-root/the-pharaohs-golden-parade
[89] Egyptian Government, Ministry of Tourism and Antiquities, Avenue of Sphinxes reopening ceremony on 25 November 2021, https://egymonuments.gov.eg/en/events/avenue-of-sphinxes-reopening-ceremony-on-25-november-2021
[90] https://egymonuments.gov.eg/en/news/egypt-under-the-spotlight
[91] https://egymonuments.gov.eg/
[92] https://egymonuments.gov.eg/en/news/a-virtual-tour-through-the-ben-ezra-synagogue
[93] https://egymonuments.gov.eg/en/news/the-etpb-invites-egyptian-influencers-to-south-sinai

figure dropped to 4% and USD 0.7 billion, respectively. According to the Statistical Service of Cyprus, the main markets for 2021 in order of arrivals were **Russia, the United Kingdom, Poland, Greece, Ukraine, Israel and Germany**. The key incentives for travelling to Cyprus **were holidays, visiting friends and family and business trips**. In the period January - September 2021, **travel receipts** amounted to approximately **€1 million**, increased by 294.7% compared to 2020 (€298.9 thousand) and decreased by 53.2% compared to 2019 (€2,234 million)[94]. Finally, during the first nine months of 2021, the **average expenditure of travellers** visiting Cyprus is estimated at €804 compared to €685 in the period January – September 2019, thus recording **an increase of approximately 17%**[95].

In June 2021, Cyprus' Deputy Minister of Tourism introduced **the new logo and brand identity of the destination** featuring the slogan 'Love Cyprus'. The objectives of the new identity are to include the different tourist products of the destination **beyond the Sun and Sea** as highlighted in the relevant promo video available on the Love Cyprus YouTube account (e.g. cycling tourism, gastronomy, wedding tourism, etc.). The new identity aims to emphasize the **Mediterranean experience**, the experiences offered **around throughout the year** (seasonality) and the **historical heritage** of the country[96]. It is noted that the aim of the National Tourism Strategy of Cyprus is to increase the annual number of tourists by 2030 from 4 million to 5 million and, at the same time, the rate of visitors to Cyprus in the **winter months** from **25% to 40%**[97]**.**

The markets of the **United Kingdom, Russia, Poland and Ukraine** are particularly important for Cyprus. The budget of the Deputy Ministry of Tourism for 2022 amounts to €53.7m of which **€5m will be allocated to digital advertising** of Cyprus as destination. Digital spending will be around the year with a view to **reducing seasonality and further highlighting off-peak periods**. In 2021, advertising expenditure on Google and Facebook was targeted to **29 countries** (Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Italy, Jordan, Lebanon, Malta, Netherlands, Norway, Poland, Romania, Russia, Saudi Arabia, Serbia, Slovakia, Sweden, Switzerland, United Arab Emirates, Great Britain, Ukraine). Apart from the promotion of the main tourist product of Cyprus (Sun and Sea), special emphasis was placed on the promotion of Special Interest Tourism types, mountainous areas and other activities that enrich the tourist experience.

In October 2021, as part of the new identity and strategy for 2022, 4 different videos (1 and 3 minute versions) on the Sun and Sea (Love Cyprus[98]), activities in nature (Cyprus. From A Greener Point Of View), sport and adventure activities (Cyprus from an Adventurous Point of View[99]) and residents and professionals of Cyprus as ambassadors of the destination (Kalimera from Cyprus[100]) were uploaded to YouTube account Visit Cyprus. The videos are available dubbed and subtitled in 5 languages

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[94] Statistical Service of Cyprus, Tourism, December 2021
[95] Republic of Cyprus Deputy Ministry of Tourism, Press Conference on the Activities of 2021 https://www.pio.gov.cy/assets/pdf/newsroom/2021/12/16122021_YfypTourismou_dimosiografiki.pdf
[96] Visit Cyprus, Presentation of Cyprus Tourism's New Logo & Brand Identity, June 2021: https://www.youtube.com/watch?v=i6n8tn9Ws2g
[97] Republic of Cyprus Deputy Ministry of Tourism, National Tourism Strategy 2030: https://www.tourism.gov.cy/tourism/tourism.nsf/All/2285A592B2A47978C225850D0027C6F3/$file/Cyprus%20Tourism%20Strategy%202030%20-%20Foreword_Gr.pdf?OpenElement
[98] https://www.youtube.com/watch?v=b70hJVxAKas
[99] https://www.youtube.com/watch?v=WpDn-8HcW30
[100] https://www.youtube.com/watch?v=wdWP0zL-P_o

(Russian, Italian, English, French, German). It is noted that the cross-cutting characteristics of the videos are the human element, impressive drone shots, slow music and voice-over, and an effort to demonstrate a population diversity, basically intended for younger generations of travellers (millennials and Gen Z). Finally, it is estimated that the 4 videos are rather self-explanatory, could refer to other destinations, and there is nothing imaginative in the story or any Call to Action for audiences to act and interact with the destination[101].

[101] Visit Cyprus, YouTube Channel: https://www.youtube.com/user/visitcyprus/videos

ANNEX 2: OPTIMISM DESPITE ONGOING UNCERTAINTY: THE KEY MARKETS OF GREEK TOURISM

2.1. MEDIUM – SHORT HAUL MARKETS

2.1.1. United Kingdom

Before the pandemic, **travel** abroad was among the **essential needs** of Britons with the travel industry sustaining more jobs than the steel industry. In 2020, according to the Office for National Statistics, Britons took 23.8 million international trips (-74% compared to 2019, 93.1 million) and spent GBP 13.8 billion (-78% compared to 2019, GBP 62.3 billion). Following the inevitable decline during the first year of the pandemic, in the period January-August 2021, travel receipts and travel traffic increased by 75.2% (from GBP 427 million in 2020 to GBP 787 million in 2021) and 30.3% (from 528 thousand in 2020 to 723 thousand in 2021), respectively[102]. In 2020 the most popular Greek destinations, according to the Bank of Greece, were **the South Aegean**, the **Ionian Islands** and **Crete**. In 2020, the Average Length of Stay increased by 12.6% compared to the country's average (9.8 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €707.3, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584.4). The Average Expenditure per Overnight in 2020 was 7.5% higher than the country as a whole (€72.4 versus €67.3)[103].

Two out of 3 Britons state that the **"traffic light" system prevented[104] them from taking a trip abroad in 2021**[105]. It is quite indicative that as the system was gradually lifted, in September 2021, active air bookings to Greece reached -24.7% of 2019[106]. The **course of the pandemic**, **travel restrictions** and **testing costs** affected the willingness of Britons to travel in the previous period with only 41.7% stating in October 2021 that they planned to travel to another European country in the next 6 months [107]. According to the European Travel Commission, Britons are interested in **Sun and Sea** (25.9%), **Cruising** (5.6%) and **City Break** (19.5%) travels. Greece ranked 5th in 2021 with Spain, France, USA, Italy, Portugal, Germany, Croatia, Netherlands and Australia in the remaining top ten places, respectively[108].

In 2022, 34% stated they would definitely travel overseas with **Mediterranean destinations** ranking at the top (Spain, France, Italy, Greece, respectively) and 43% preferring **Sun and Sea**, 30% **City Break**,

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[102] Bank of Greece, Developments on Travel Balance of Payments: August 2021, October 2021
[103] INSETE, Incoming Tourism from the United Kingdom, October 2021
[104] The "traffic light" system of Great Britain concerned the healthcare regulations that applied upon return of the country's citizens from overseas destinations and which were regularly updated. For "green" list countries travellers did not need to quarantine but had to take a PCR test on return to the UK; for "orange" list countries both a PCR test and 10-day quarantine at home were mandatory; for "red" list countries both a PCR test and a 10-day stay in a managed quarantine hotel were mandatory.
[105] World Travel Market, WTM Industry Report 2021, November 2021
[106] INSETE, Recovery Tracker, 20/10/2021 here
[107] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 9, October 2021
[108] ABTA, Six Trends for Travel in 2021, December 2020

16% **Adventure** and 15% **Cruising trips.** At the same time, **staycations** are maintaining their momentum in 2022 with 17% of Britons stating that they will plan a trip within their country in 2022.

Outside Europe, according to Forbes Advisor, the **US** is the **dream holiday destination of Britons** for 2022 (once in a lifetime holiday/3-6 hour flight) with 38% choosing **luxury travel** and 30% **Sun and Sea**. [109] According to the World Travel Market London 2021 Industry Report, in 2022, **1/3** of those considering to travel overseas will choose to book a **package holiday** for more **security** against **unexpected changes** that are the new normal during the pandemic. The percentage of those who consider that they are more likely to consult a **travel agent** than before the pandemic is 20% of 18-21s; 21% of 22-24s and 22% of 35-44s.

Interestingly, there is a **growing importance of well-being** for Britons during this period according to Barclays[110], whereby they will pay 5.8% more on average for enhanced health and well-being services in their day-to-day lives, particularly for health clubs and wellness resorts. The universal interpretation of well-being is linked to **lifestyle and habits that affect our diet, exercise, movement, sleep**. In relation to travel and tourism, wellness is associated with both specialized services such as special culinary propositions or spa treatments, but also basic things such as **change of scenery**, a **walk in the fresh air** or a **relaxing environment**[111]**,** It is noted that according to Booking.com, 82% of the Brits state that simply **feeling the sun on their skin** will improve their mood[112].

Sustainability another important factor for 63% of Britons when **making travel purchases**[113]**.** 33% of the Brits report that they are willing to pay 25% more for “greener" services and products with the respective shares of Millennials, Gen. Z and Baby Boomers being 40%, 35% and 30%. It is noted that ABTA has developed ‘Travelife for Accommodation – Stay Better’, the top sustainability certification for hospitality businesses[114].

2.1.2. France

In 2021, Greece and France signed the **defence agreement,** which led to strengthening of the relations between the two countries, including tourism-related initiatives that positively impacted the discussions on the **importance of the French market for Greece**. It is characteristic that in 2021, the French market, apart from **a high arrival rate**, also recorded **a high replacement rate in terms of the expenses** incurred**.** In the period January-August 2021, travel receipts and travel traffic from France increased by 207.7% (from 233 million in 2020 to 731 million in 2021) and 184.8% (from 272 thousand in 2020 to 775 thousand in 2021), respectively[115]. In 2020 the most popular Greek destinations,

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[109] Forbes Advisor, 2022 Dream Destination, November 2021 here
[110] https://www.barclayscorporate.com/content/dam/barclayscorporate-com/documents/insights/industry-expertise/Barclays%202020%20HL%20Wellness%20Report.pdf
[111] Barclays, The Wellness imperative: How hospitality and leisure can deliver what consumers want, October 2020
[112] Bookings, Travel Trends 2022, October 2021
[113] Simon-Kucher and Partners, Global Sustainability Study 2021, October 2021
[114] https://www.abta.com/about-us/travelife-sustainability-tourism
[115] Bank of Greece, Developments on Travel Balance of Payments: August 2021, October 2021

according to the Bank of Greece, were **the South Aegean**, **Crete** and **Attica**. In 2020, the Average Length of Stay increased by 12.5% compared to the country's average (9.8 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €738.8, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The Average Expenditure per Overnight in 2020 was 19.2% **higher** than **the country as a whole** (€80.2 versus €67.3)[116].

The French were among **Europe's travel "champions"** in the 2021 with 67% stating that their desire to take a trip in the summer of 2021[117]. It is quite indicative that in September 2021, active air bookings to Greece reached -8.6% of 2019[118]. According to the European Travel Commission (ETC), the French continue to want to travel in 2022, but they demonstrate the **highest level of uncertainty** regarding the **timing** of their next trip (31%) among the European markets included in the survey and are mainly interested in **Sun and Sea** (20.7%), **Cruising** (2.5%) and **Culture and Heritage** (17.3%) travels.

After a sufficient period of isolation, holidays with **friends and family** are very popular with 48% of the French[119] stating that they will travel to **spend more quality time** with their **beloved**. 56% of French people report that they will travel to **escape from their daily routine**, 42% to **discover new destinations** and 26% to **reconnect with nature**[120]**.** According to Cofidis[121]**,** 46% of French people **look optimistically at their finances** for 2022. This optimism is highest among **HNWI** (67%) and **age groups under 35** (57%). 4 out of 10 French people state that they plan to **take a trip in 2022** with **an average budget of €2.703**[122].

As reported in the Ipsos/ Europ Assistance Barometer, **safety** is now very important for French people with 77% planning to take more precautions to protect themselves against COVID-19. Several French people are optimistic that they will be able to travel under "normal conditions", without masks or tests, by 2022 (37%) or 2023 (31%), and believe that the **current situation is temporary**; hence, few of them state that they will maintain the new travel habits acquired during the pandemic, **except for trips to nearer destinations** (45%). Apart from the **proximity of destinations** – which also ensures greater safety – **simplicity** and **flexibility** are very important factors for the French on their next trip. Finally, French travellers are particularly interested in sustainability stating their readiness[123] to adopt behaviours to **avoid wasting local resources** (91%), to use a **reusable water bottle** (89%) or to **support local tourism businesses** (84%).[124] Indicative of this trend is the decision of the French government[125] to allocate 1/3 of the €100 billion of the Pandemic Recovery Plan (France Relance) to the **ecological transition** which is now a **strategic direction** of the country.

[116] INSETE, Incoming Tourism from France, October 2021
[117] Ipsos/ Europ Assistance, Baromètre des vacances d'été 2021, June 2021
[118] INSETE, Recovery Tracker, 20/10/2021 here
[119] https://www.tendancehotellerie.fr/articles-breves/communique-de-presse/16426-article/etude-homeexchange-x-yougov-sur-les-nouvelles-vacances-des-francais
[120] Étude YouGov x Home Exchange, Les sentiments de voyageurs face au COVID-19, March 2021
[121] https://www.questiondebudget.fr/projets-des-francais/liste-projets-francais-2022/
[122] Cofidis, 10e Baromètre du pouvoir d'achat Cofidis, November 2021
[123] https://www.europ-assistance.fr/drupal/sites/default/files/inline-files/Holiday%20barometer%202021%20-%20Ipsos%20for%20EA%20-%20Global%20report%20-%20FRENCH.pdf
[124] Ipsos/ Europ Assistance, Baromètre des vacances d'été 2021, June 2021
[125] https://www.ecologie.gouv.fr/france-relance-transition-ecologique

2.1.3. Germany

In the period January-August 2021, travel receipts and travel traffic from Germany increased by 111.1% (from 529.9 million in 2020 to 1,264 million in 2021) and 114.7% (from 726.4 thousand in 2020 to 1,534 thousand in 2021), respectively[126]. The Top 5 international destinations chosen by the Germans in 2020 were: **Spain, Italy, Austria, Turkey and the Netherlands**[127]. **Greece** ranked **8th** (2.8%) and the most popular Greek destinations according to the Bank were **Crete, the South Aegean and Central Macedonia.** In 2020, the **Average Length of Stay** increased by 26.6% compared to the country's average (11.3 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €743.2, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The **Average Expenditure per Overnight** in 2020 was 1.9% lower than **the country as a whole** (€66 versus €67.3)[128].

Germans still dream of travelling even during the pandemic although they now prefer **last-minute bookings** with only 13% having already booked their holidays for 2021 in July of the same year[129]. **Greece ranked 4th** among the destinations considered for 2021-2022 with Spain, Italy, Austria and Turkey, respectively, completing the top five foreign destinations for Germans[130]. It is quite indicative that **in September** 2021, active air bookings to Greece reached -18% of 2019 (**historic increased compared to the previous months of 2021)**[131]. According to the European Travel Commission, **2 out of 3 Germans** plan to travel between October 2021 and March 2022 with 47% wishing to travel to another European country. The Germans are mainly interested in **Sun and Sea** (22.8%), **Nature and Outdoors** (17.9%) and **Cruising** (2.3%) trips. Finally, Germans are willing to **pay to visit less crowded destinations** and locations at a rate of 39.2% and travel **in the off-season** at a rate of 48.3[132].

The pandemic made the Germans more cautious about accommodation safety with 24% stating that they wish to buy a caravan thus **permanently opting for camping** for their future vacation. From 2022 onwards, however, **hotels and clubs** return to the top of the list of preferences, while **cruises** are also becoming more popular. As confirmed by Reiseanalyse, in the midst of the pandemic there is **an increasing trend in holiday accommodation bookings** (43%) and a corresponding **decline in package holiday bookings** (flight and accommodation) (32%) while the rate of online bookings (49%) continues to be on the rise. At the same time, according to Visit Britain, Germans are most inspired by the **destination and hotel websites**, **travel agencies** and reviews on websites such as TripAdvisor, while **Social Media** are more influential for **ages groups up to 30.** Interestingly, 22% appreciate **short and**

[126] Bank of Greece, Developments on Travel Balance of Payments: August 2021, October 2021
[127] DRV, DER DEUTSCHE REISEMARKT, March 2021
[128] INSETE, Incoming Tourism from Germany, October 2021
[129] GIK, German Travel Trends 2021-2022, July 2021 (here)
[130] RA, Reiseanalyse 2021, March 2021
[131] INSETE, Recovery Tracker, 20/10/2021 here
[132] European Travel Commission, European's Attitudes Towards Responsible Travel Choices, June 2021

entertaining content and 12% are inspired by **storytelling** with the majority still interested in **practical and clear information**.[133].

According to Ipsos, Germans usually travel for **approx. 2 weeks** with 22% stating that they intend to **further increase the duration of their holidays**. 63% travel with their **partner**, 31% with their family and 16% with friends. They mostly travel to spend time with their beloved (44%), to rest (30%) and to **enjoy their accommodation** (31%). The **average holiday budget** of Germans in the summer 2021 was **€1,843[134].**

Finally, Germans **are particularly interested in sustainability** and, along with Poles, are **more willing to pay more** to **support local economies** (37.7%) as well as for accommodation and means of transport that **take measures to reduce their carbon footprint** (33.6%)[135]. It is noted that according to the European Travel Commission, **the Germans - together with the Swiss and the Austrians - are more resistant than all Europeans to the use of single-use plastics** as a protection measure against COVID-19 during their travel with only 34.4% saying they agree to their use. Interestingly, according to Reiseanalyse, the sustainable practices most easily adopted by the Germans are **those that are already integrated in their daily lives**, such as: **walking or cycling** (36%), **avoiding littering** (25%) and **purchasing products or souvenirs locally produced at the destination** (24%).

2.1.4. Austria

According to Statistics Austria, in 2020 Austrians took almost 3.9 million international trips (-67.4% compared to 2019) of which 83% (-68.2% compared to 2019, 3.2 million) were for **leisure** and 17% (-63.2% compared to 2019, 671 thousand) for **business**. The main destinations were **Italy** (22.4%), **Germany** (19.0%), **Croatia** (8.5%), **Spain** (5.5%) and **Greece** (4.3%). Most international travels took place in the **third (July – September) and first quarters** in order of priority (1676 and 981 thousand respectively)[136]. In 2020, the most popular Greek destination, according to the Bank of Greece, was the **Ionian Islands[137]**. In 2020, the Average Length of Stay increased by 3.4% compared to the country's average (9 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €698.9, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The Average Expenditure per Overnight in 2020 was 15.6% higher than the country as a whole (€77.8 versus €67.3)[138].

Austrian travellers, who traditionally pre-booked their holiday, seem to have been affected by the uncertainty induced by the pandemic. Currently, the predominant trend seems to be **last-minute bookings** mainly for short trips. Although the pandemic has affected the incomes of Austrians, **their**

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[133] Visit Britain, Market and Trade Profile: Germany, February 2021
[134] Ipsos/ Europ Assistance, IPSOS / EUROP ASSISTANCE Baromètre vacances des Européens, des Américains et des Asiatiques, June 2021
[135] European Travel Commission, European's Attitudes Towards Responsible Travel Choices, June 2021
[136] Statistics Austria, Holiday, and Business Trips 2020, 2021 (here)
[137] INSETE, https://insete.gr/wp-content/uploads/2020/09/21-10_Austria_2016-2020.pdf
[138] INSETE, Incoming Tourism from Austria, October 2021

holiday propensity remains high on their list of priorities. It is worth noting that in September 2021, **active air bookings to Greece reached -51.1% of 2019**[139]. According to the European Travel Commission, **51% of Austrians plan** to travel to **another European country** in the period October 2021-March 2022 with the **percentage of those who are uncertain about the exact period increased** by 79%. It is estimated that the increasing uncertainty is linked to the **upward trend of Covid-19 cases** in the country in the autumn of 2021. It is noted that the **Austrians** are among the Europeans who **are least concerned about the possibility of getting sick and their wider safety on their next trip** due to the epidemiological situation.

Although Austrians have traditionally sought Sun and Sea holidays, for 2022 they seem to **prefer Nature and Outdoors** (17.2%) and **City Break** (15.2%) trips[140]. Sport tourism (mainly cycling), sustainable tourism, golf tourism, nautical tourism and camping are also gradually **gaining share**. At the same time, Austrians are **more willing to take a business trip** than other Europeans (8.3%) **after the Swiss**.

It is estimated that online bookings in 2023[141] will account for 37.6% of the market[142]. Austrians tend to **book their holiday online** with rates **rising** when planning a trip **abroad.** Recent years have seen[143] a **decreasing dependence on travel agents** with only 10.2% choosing a tour operator in the first half of 2021[144]. Austrians usually travel for **approx. 2 weeks** with 21% stating that they intend to **further increase the duration of their holidays**. 63% travel with their **partner**, 24% with their family and 16% with friends. Interestingly, among the reasons they travel **enjoying their accommodation** (26%), **exercising** (17%) and **making new acquaintances** (16%) show an upward trend. It is noted that **Austrians** (52%) are among the Europeans who mostly prefer **hotels**. Finally, the **average holiday budget** of Austrians in the summer 2021 was **€2,088.**

Austrians would choose an **accommodation with some environmental certification** by 75%, would **support local businesses** by 82% and would use a **personal water bottle** in their travels by 87%[145]. It is noted that according to the European Travel Commission, Austrians **are more resistant than all Europeans to the use of single-use plastics** as a protection measure against COVID-19 during their trips with only 20.6% saying they agree to their use.[146].

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[139] INSETE, Recovery Tracker, 20/10/2021 here
[140] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 9, October 2021
[141] https://www.statista.com/forecasts/891634/online-travel-booking-penetration-rate-in-austria
[142] Statista, Online Travel Booking penetration rate in Austria 2017 – 2023, available here
[143] http://www.statistik.at/web_en/statistics/Economy/tourism/travel_habits/126754.html
[144] Statistics Austria, Press release: 12.616-207/21, available here
[145] Ipsos/ Europ Assistance, IPSOS / EUROP ASSISTANCE Baromètre vacances des Européens, des Américains et des Asiatiques, June 2021
[146] European Travel Commission, European's Attitudes Towards Responsible Travel Choices, June 2021

2.1.5. Belgium

Belgians **love travels** with 82% stating their intention to take a leisure trip in 2020[147]. According to STATBEL, in 2020 Belgians took 7.1 million international trips of which 28% involved 1-3 overnight stays and 72% 4 or more overnight stays. 94% of these trips were for leisure and 6% for business. The top 5 international destinations for 2020 were **France** (38.1%), the **Netherlands** (11.3%), **Spain** (7.7%), **Italy** (7.0%) and **Germany** (6.6%) while Greece accounted for 2% of international travel. Finally, 63% of international trips were taken by **car**, 29% by **airplane** and 9% by other means. In 2020, the most popular Greek destination, according to the Bank of Greece, was **Crete**. In 2020, the Average Length of Stay increased by 25.6% compared to the country's average (10.9 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €678.4, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584.4). The Average Expenditure per Overnight in 2020 was 7.6% higher than the country as a whole (€62.2 versus €67.3)[148].

53% of Belgians were willing to take a trip in summer 2021 with 43% stating that they would travel **for 1 week**, 35% for **2 weeks** and 21% for **3 weeks or more.** The 5 most popular destinations for Belgians in summer 2021 are **France (38%), Belgium (32%), Spain (19%), Italy (10%) and the Netherlands (10%)**[149]. It is quite encouraging that in September 2021, **active air bookings to Greece reached -15.4% of 2019**[150]. According to the European Travel Commission, **2 out of 3 Belgians** plan to travel to **another European country** in the period October 2021-March 2022 and are mainly interested in **staying outdoors and enjoying nature (slow tourism)** such as **Sun and Sea** (22.6%), **Nature and Outdoors** (14.4%) and **Culture and Heritage** (9.2%) trips[151]. It is noted that 88% states that **the simply pleasure of feeling the sun on the skin** will improve their mood[152].

One in two Belgians states that the COVID-19 pandemic has increased their interest **in travels that benefit their mental balance and fitness**. 45% of Belgians are interested in the **holiday provider's environmental protection** and **sustainable development** commitments and 40% will book their holidays **one month before their departure**. Those who will travel in the winter 2022 are particularly interested in **their safety**, namely **regular cleaning of the accommodation** (38%), **use of face mask in public spaces** (31%) and **observance of social distancing** (26%)[153]. It is noted that according to the European Travel Commission, Belgians **are resistant than all Europeans to the use of single-use plastics** as a protection measure against COVID-19 during their trips with only 39.4% saying they agree to their use[154]. Belgium is also one of the countries in Europe with the highest teleworking rates

[147] IPSOS / EUROP ASSISTANCE BAROMETER, Future of Travel – Belgium, July 2020
[148] INSETE, Incoming Tourism from Belgium, October 2020
[149] Ipsos/ Europ Assistance, Le Baromètre des vacances d'été 2021 d'Europ Assistance, June 2021
[150] INSETE, Recovery Tracker, 20/10/2021 here
[151] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 9, October 2021
[152] Booking.com, Travel predictions 2022, October 2021
[153] Club Med, Ski Report Édition 2021-2022, October 2021
[154] European Travel Commission, European's Attitudes Towards Responsible Travel Choices, June 2021

(17.2%),[155] while TUI Belgium promotes 'workcation' packages[156] on its website. As reported in the Ipsos/ Europ Assistance Barometer, during their holidays the Belgians wish to **relax** (30%), **spend time with their family** (44%) and **enjoy the accommodation of their choice** (30%). Interestingly, 38% of those who will take a ski trip in the winter 2022 are also interested in **local gastronomy** while 69% associate **mountain escape with the beauty of landscapes**[157]**.** Finally, Belgians traditionally have **a relatively high holiday budget** and it is estimated that in 2022 it will be similar to that of 2019 – the average budget in **was €2,242 in 2019, €1,788 in 2020, and €1.983 in 2021.** In 2021, 53% reported the lowest budget (< €1,500) and 21% the highest (> €2,500)[158].

2.1.6. The Netherlands

According to INSETE, in 2020 due to the pandemic, the total number of international trips taken by Dutch people dropped by -48% (from 22.4 million in 2019 to 11.7 million in 2020). The main destinations for 2020 were **countries accessible by road** such as Belgium, France, Germany and Austria. It is noted that according to Statistics Netherlands[159], in 2019 Greece accounted for 3.7% of Dutch travel expenses. In 2020, the most popular Greek destinations, according to the Bank of Greece, were **the South Aegean**, **Crete** and the **Ionian Islands**. In 2020, the Average Length of Stay increased by 17% compared to the country's average (10.2 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €658.9, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The Average Expenditure per Overnight in 2020 was 3.6% higher than the country as a whole (€64.8 versus €67.3)[160].

46% of Dutch stated that a **leisure trip** is the **activity they are most eager** to enjoy in 2021[161]. It is worth noting that in September 2021, **active air bookings to Greece reached -43.5% compared to Spain at 37.5% and to Portugal at 45.8%,** respectively[162]. According to the European Travel Commission, **2 out of 3 Dutch** plan to travel to **another European country** in the period October 2021 - March 2022 and are mainly interested in **Sun and Sea** (27.8%), **City Break** (21.2%) and **Nature and Outdoors** (14%) trips. Interestingly, in the 9th wave of survey the interest of Dutch people in **City Breaks increased by** 34% as opposed to a decrease in **Nature and Outdoor trips** by 31%[163].

The Dutch are very familiar with technology with 2/3 reporting that they had booked their summer holidays online in 2017. In 2019[164], approx. 71% of 25-35s booked their holidays online while the share

[155] https://www.statista.com/statistics/879251/employees-teleworking-in-the-eu/
[156] A type of vacation that combines remote working with holidays so that employees can enjoy holiday experiences without losing a day of work. It gained greater visibility during the pandemic.
[157] ClubMed, Club Med Ski Report Édition 2021-2022, October 2021
[158] Ipsos/ Europ Assistance, Holiday Barometer, June 2021
[159] https://www.cbs.nl/en-gb/news/2020/13/foreign-travellers-spent-17-billion-euros-in-2019
[160] INSETE, Incoming Tourism from Belgium, October 2020
[161] Simon-Kucher and Partners, Travel Trends 2021, June 2021
[162] INSETE, Recovery Tracker, 20/10/2021 here
[163] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 9, October 2021
[164] https://www.statista.com/statistics/619921/online-holiday-bookings-in-the-netherlands-by-age/

of online bookings increased in almost all age groups compared to previous years. 95.7% of Dutch **have a smartphone** and 90.2% **use the internet** on a **mobile device**[165]**.**

According to the CBI[166], the Netherlands is a market with a has a **huge potential for direct bookings** as only 3% always book their trip via a tour operator. Moreover, they are generally **hardly loyal to the same brand** (10%) but they will easily choose a new brand to try. The **ability of a brand to deliver on its promise** (48%), the **pleasant experience** (26%) as well as the adoption of **ethical** (23%) and **sustainable** (17%) practices are among the main factors that will drive Dutch people **to remain loyal to it**[167]. 26% of Dutch people estimate that they will **spend more** on **leisure travel** in the coming years. In 2019, **couples without children** incurred the **largest travel expenditure** (€2,882) compared to families (€2,699) and singles (€1,474)[168].

Dutch people **care about their fitness**, want to **stay in shape** and are **more interested in enjoying as much as possible of their travel by staying active** than in luxury accommodation. 64% state that they **intend to continue working from home** even after the end of healthcare restrictions[169]. The Netherlands is also one of the European countries with the **highest teleworking rates** (17.8%), while 38% of the Dutch state that they are likely to take a **workcation** in the future[170]. As reported in the Ipsos/Europ Assistance Barometer, in terms **of safety**, only 52% of Dutch – compared to 70% worldwide – consider clear health and safety policies as a prerequisite to choose accommodation. Additionally, 50% – compared to 62% worldwide – are willing to accept health tests on arrival at a destination. It is worth noting that, in November 2021, only 64.8% of the Dutch were fully vaccinated against COVID-19.

2.1.7. Switzerland

According to the Federal Statistical Office, in 2019 the Swiss took 22.4 million trips with at least 1 overnight stay (-10% compared to 2018, 24.9 million) of which 35% within Switzerland and **65% abroad**. By age group, people aged **25-44** years took the highest number of trips with 3.6 trips per person. The top 3 destinations were **Germany** (13%), **Italy** (12%) and **France** (8%). 49% of Swiss took a trip in the summer of 2020 with 64% travelling to **another European country**[171]. In 2020, the most popular Greek destination, according to the Bank of Greece, was **Crete**. In 2020, the Average Length of Stay increased by 14.3% compared to the country's average (9.9 overnight stays per visit compared to 8.7 overnight stays). The **Average Per Capita Expenditure** in 2020 amounted to €841.4, **almost 50% higher** than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The

[165] Hootsuite, Digital 2021 – Netherlands, February 2021
[166] https://www.cbi.eu/market-information/tourism/free-independent-travellers-fits/market-potential
[167] PwC Netherlands, Global Consumer Insights Survey 2021 – Pulse 2 – Dutch shopper, June 2021 (here)
[168] https://www.statista.com/statistics/664322/average-holiday-expenditure-in-the-netherlands-by-household-type/
[169] GFK, Insight Netherlands, June 2021
[170] https://www.statista.com/statistics/879251/employees-teleworking-in-the-eu/
[171] Ipsos/ Europ Assistance, IPSOS / EUROP ASSISTANCE Baromètre vacances des Européens, des Américains et des Asiatiques, June 2021

Average Expenditure per Overnight in 2020 was 25.9% higher than the country as a whole (€84.7 versus €67.3)[172].

Interestingly, the desire for travel remained stable in Switzerland in the period **before and during the pandemic** and has even risen from 60% in 2019 to 63% in 2021. It is worth noting that in September 2021, **active air bookings to Greece reached -47.8% of 2019**[173]. According to the European Travel Commission (ETC), **61% of the Swiss plan** to travel to **another European country** in the period October 2021-March 2022 with the percentage of those who are uncertain about the exact period increased by 47%. The Swiss are mainly interested in **staying outdoors and enjoying nature (slow tourism)** such as **Coast and Sea** (16.3%) and **Nature and Outdoors** (13.7%)[174] trips. It is worth noting that 78% states that **the mere feeling of the sun on the face** will improve their mood[175]. At the same time, Swiss are **more willing to take a business trip** than the other Europeans (8.6%). Finally, the Swiss are particularly interested in mountain holidays and outdoor activities.

Swiss would choose an **accommodation with some environmental certification** by 73%, would and would use a **personal water bottle** in their travels by 86%[176]. It is noted that according to the European Travel Commission, Swiss **are resistant to the use of single-use plastics** as a protection measure against COVID-19 during their trips with only 28.9% saying they agree to their use.[177].

Swiss usually travel for **approx. 2.1 weeks** with 16% stating that they intend to **further increase the duration of their holidays**. 59% travel with their **partner**, 26% with their family and 14% on their own. Interestingly, **there is an increase in solo travellers in 2021**. Finally, the Swiss spend more when travelling abroad than domestically and have **a high holiday budget** which was €2,473 on average in summer 2021.According to Knight Frank, there are **7,553 UHNWIs[178]** and **773,000 HNWIs[179] or millionaires[180]** living in Switzerland in 2021. 63% of the Swiss have an average annual income of €51,627 or more according to the OECD[181].

2.1.8. Poland

In 2020, there were 296,000 arrivals recorded from Poland, accounting for 4% of the country's total, while expenses stood at €142 million representing 3.3% of the country's total. In 2020, the Average Length of Stay decreased by 26% compared to the country's average (6.7 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 was 18% lower than

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[172] INSETE, Incoming Tourism from Switzerland, October 2021
[173] INSETE, Recovery Tracker, 20/10/2021 here
[174] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 9, October 2021
[175] Booking.com, Travel predictions 2022, October 2021
[176] Ipsos/ Europ Assistance, Baromètre vacances des Européens, des Américains et des Asiatiques, June 2021
[177] European Travel Commission, European's Attitudes Towards Responsible Travel Choices, June 2021
[178] Ultra High Net Worth Individuals (UHNWIs): Individuals having a net worth of at least 30 million US dollars – including their primary residence.
[179] High Net Worth Individuals (HNWIs): Individuals having a between 1 – 5 million US dollars in liquid financial assets.
[180] https://www.knightfrank.com/research/article/2021-03-08-why-switzerland-is-back-in-the-spotlight
[181] https://www.oecd.org/social/under-pressure-the-squeezed-middle-class-689afed1-en.htm

the Average Per Capita Expenditure recorded for the country as a whole (€479 versus €584.4). The **Average Expenditure per Overnight** in 2020 was 11% **higher** than **the country as a whole** (€75 versus €67.3)[182].

Poland has been **an emerging market for Europe and Greece** in recent years with 73% of Poles reporting they are willing to travel between October 2021 and March 2022 and 49% stating that they wish to travel to another European country. It is quite indicative that in September 2021, active air bookings to Greece reached 9.7% of 2019[183]. **The upward trend** that had been observed since 2019 **endured the impact of the pandemic**. In 2019 Poland recorded a higher rate of international travel than the rest of Europe (6% versus 2.5%)[184]. According to the European Travel Commission (ETC), the Poles continue to wish to travel in 2022, but they demonstrate the **high level of uncertainty** regarding the **timing** of their next trip (58%) and are mainly interested in **Coast and Sea** (17%), **City Break** (22.8%) and **Culture and Heritage** (13.4%) travels. Interestingly, Poles who choose City Breaks showed a 50% increase in wave 9 of the ETC survey[185].

37.6% of Poles **are Millennials** who, due to the country's rapid economic growth in recent years, have a **greater purchasing power** than previous generations. When travelling, millennials look for **authenticity, safety, sustainable practices, and specialized experiences**. They are rather inspired by **the content uploaded by friends and acquaintances on social media,** reviews on websites such as **TripAdvisor**, as well as by **Influencers**, than more traditional advertisements and digital banners[186].

The most **popular form of holiday** in Poland currently is **package holiday** expected to account for 8.1 million Travellers and USD 6.4 million in 2026. In 2021 package holiday accounts for **14.4% of total travel** and it is estimated that in 2026 they will reach 21.8%. In 2026 it is estimated that 84% of the package holiday total value will come from **online sales**[187]. According to Statista, in 2023 it is estimated that 73% **of all travel expenses** will come from **online sales**.

Finally, Poles are willing to **pay to visit less crowded destinations** and locations at a rate of 43.4% and travel **in the off-season** (57.6%)[188]. According to the PwC, 92% of Poles continue to **care about the protection of the planet and environmental sustainability** even during the pandemic, with ¾ reporting that they are trying to adopt **environmentally responsible behaviours** during the pandemic. Interestingly, **less environmentally friendly means of transport** are more likely to be chosen than by **18-44s**[189]. 46% also admit that due to the pandemic there are **more important issues than environmental protection**, which is also confirmed by an ETC survey according to which Poles are **more willing to use single-use packaging** when travelling (71.7%). At the same time, they are more willing **to pay more to support local economies** (46.5%) as well as for **accommodation and means of transport** that **take measures to reduce their carbon footprint** (36.8%).

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182 INSETE, An X-Ray of Incoming Tourism 2016-2020 – Market Profile, October 2021
183 INSETE, Recovery Tracker, 20/10/2021 here
184 ITB Berlin, Worldwide Trends 2020,
185 European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel – Wave 9, October 2021
186 CBI, The European market potential for Generation Y tourism, January 2021
187 Statista, Package Holidays – Poland, here
188 European Travel Commission, European's Attitudes Towards Responsible Travel Choices, June 2021
189 PwC, A new image of the Polish consumer, 2020 here

2.1.9. Italy

The **overwhelming impact** of the COVID-19 pandemic and the sharp decline in its GDP in 2020 had extremely negative repercussions on Italian travellers' arrivals and spending in Greece. In 2021 there is a **considerable recovery** yet at lower levels than 2019. In 2019, Greece was visited by 1.55 million Travellers from Italy visited who spent €1.01 billion. Arrivals from Italy were already down by -6.8% in 2019, after their hike by 15.7% in 2018. In 2020, they dropped sharply by 76.0%. Receipts from travellers from Italy dropped to €217.7 million, from €1.01 million in 2019 (in 2019 they had reached 5.7% of the total). The receipts from Italy in the first nine months of 2021 **amounted to 51% of the corresponding** nine-month period of 2019[190]. In 2020, the most popular destinations of Italians in Greece, according to the Bank of Greece, were **Attica, the South Aegean, and the Ionian Islands**. The **Average Expenditure per Overnight** of travellers from Italy in 2020 was **0.2% lower than that recorded for the country as a whole** (€583.2 versus €584.4). The **Average Expenditure per Overnight** of tourists from Italy in 2020 was **6.3% lower** than that recorded for the country as a whole (€63.0 versus €67.3). The **Average Length of Stay** of tourists from Italy in 2020 was **6.5% longer** than for the country as a whole (9.3 overnight stays versus 8.7 overnight stays)[191].

According to ISTAT, the most popular countries in terms of traffic from Italy in 2020 were **France** (14.4%), **Spain** (10.2%), **Switzerland** (7.3%) and **Austria** (7%). France was the most popular destination for short breaks (22.9%) in 2020. The main motivation to take a trip was **holidays at sea** (53.9%), followed by **holidays in the mountain** (31%) and in the **countryside** (15.1%)[192]. Interestingly, Italians have **third highest average age in Europe** and the fifth in the world (47 years). They take on average **30 days holiday** per year and also have the **5th largest HNWI population in Europe and 9th in the world** (298,000 in 2020). After COVID-19, 3 out of 5 Italians report that they **will make last minute bookings** and 60% state they will prefer to book their holidays with a t**ravel agent for more security** and fewer uncertainties around practical aspects of travel planning[193].

According to the European Travel Commission (ETC), Italians will travel with their family at a rate of 37% and their partner at a rate of 37%; 45% will travel for **4-6 nights** and 30% will spend **€501–1000**. During their holiday, they are interested in **culture and heritage** (30%), **Sun and Beach** (14%) and **Coast and Sea** (10%). They say they are ready to travel at a rate of 67% and prefer to **travel within their country** at a rate of 48%[194].

According to Statista, Italians are **very familiar** with the concept of sustainable travel, with 85% stating they are aware of it (2021). About 6 out of 10 Italians say that they take **environment protection** into

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[190] INSETE, Greek Tourism, Issue 5 – Developments in the World Economy and the Main Tourism Markets of Greece, March 2022 (In Greek)
[191] INSETE, Incoming Tourism from Italy to Greece 2016 – 2020, October 2021
[192] ISTAT, Trips and Holidays 2020, September 2021 (available here)
[193] Visit Britain, Market and Trade Profile: Italy, June 2021
[194] European Travel Commission, Monitoring Sentiment for Domestic and Intra-European Travel, February 2022

account when planning their next trip[195]. Finally, Italians largely prefer adventure trips – even more than Britons or Germans – and are particularly interested in the cultural aspect of an adventure trip[196].

2.1.10. Sweden

In 2020, as expected, Swedes travelled considerably less with **Spain, Denmark, Finland, Germany, and Thailand** in the top five tourist destinations followed by **Greece** in **6th place (71,000 trips)**.[197] In 2020, the **Average Length of Stay increased** by 46.7% compared to the country's average (12.7 overnight stays per visit compared to 8.7 overnight stays). The **Average Per Capita Expenditure** in 2020 amounted to €574.7, **lower** than the Average Per Capita Expenditure recorded for the country as a whole (€584.4). The **Average Expenditure per Overnight** in 2020 was 33% **lower** than **the country as a whole** (€45.1 versus €67.3)[198].

Swedes continue to travel during the pandemic preferring staycations[199] and **trips to neighbouring countries**. It is worth noting that in 2020 they took **10 trips within their country** on average. In September 2021, 81% of Swedes want to take a leisure trip in the next 12 months with 74% wanting to travel to Europe with **Greece ranking 2nd** (22%) and Spain, England, Italy, and Denmark, respectively, making up the top five[200]. In **September** 2021, active air bookings to Greece reached -45.9% of 2019[201]. Swedes want to travel abroad to **relax** (46%), visit a **new destination that has always been at the top of their bucket list** (35%) and **return to a favourite destination** (33%)[202]. **Visiting friends and relatives** as well as spending time on **beaches, islands, forests, and national parks** are particularly popular reasons for travel during the pandemic[203].

Sweden is **a small but wealthy country** with a population of 10 million inhabitants and a GDP per capita of €41,000[204]. According to the Capgemini World Wealth Report 2021, Sweden ranks **24th among the countries with the most HNWIs** with 153,000 in 2020**. Most Swedes (98%) prefer to book their trip online** while 38% **start thinking about their trips 6 months earlier.** 36% book 3-6 months and 34% 1-2 months in advance. It is also interesting that of those who booked their accommodation independently, 48% booked it directly from the provider and 48% through a tour operator or travel agency. **The most important source of information is word of mouth and friends and relatives** followed by price comparison websites and information from search engines. According to Google,

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195 Statista, Sustainable Tourism in Italy, December 2021 (available here)
196 CBI, The European market potential for adventure tourism, January 2021
197 European ERV, The travel barometer 2021 (here)
198 INSETE, Incoming Tourism from Sweden, October 2021
199 Type of holiday consisting in a trip to a domestic destination very close to the place of residence or even holiday activities at the place of residence. It emerged during the pandemic.
200 Visit Britain, Inbound COVID-19 Sentiment Tracker, September 2021 (here)
201 INSETE, Recovery Tracker, 20/10/2021 here
202 YouGov, Nordic travel and tourism webinar On-Demand, October 2021 (here)
203 Visit Britain, Sweden Market Profile, October 2021
204 https://www.cbi.eu/market-information/tourism/free-independent-travellers-fits/market-potential

Swedes are **particularly open to online advertising** with 43% stating that they searched for a destination or a provider after seeing an online advertisement[205].

In the midst of the pandemic, Swedes are particularly interested in **their safety**, hygiene and protection measures taken at the destination (37%), refund possibility (40%) and travel safety, avoidance of overcrowding (71%) and the likelihood of contracting COVID-19 during their trip (57%). **Greece is not considered a safe country by 59% ranking second to last** after France, Italy, and Portugal.

Sweden is the **birthplace of the flygskam (flight shaming) movement[206]** and the world famous climate activist Greta Thunberg. It is a pioneer in lifecycle assessment that is seen as crucial to **fully understand the impacts of consumer behaviours on climate change**. The country is particularly concerned with the Sustainable Development Goals (SDGs) for the preservation of Arctic sea ice with a view to achieving net zero carbon emissions by 2045. **Sustainability is therefore becoming an increasingly important factor for Swedish travellers with 1 in 2 stating that they are increasingly influenced by the environmental impact when planning a future trip.** At the same time, 3 out of 5 are interested in an application that will allow them to measure their personal carbon footprint. According to Booking.com's 2021 Sustainable Travel Report, 3/4 of Swedes want to reduce the waste they produce in their future trips and 1/3 have already started shopping in small independent businesses to support local economies[207].

2.1.11. Norway

In Q2 2021 only 100,000 Norwegians travelled abroad and almost 2 million at home with **Denmark, Sweden, Spain, England, Germany and France** in the top five destinations, and spent approximately NOK 1.3 million on their international trips[208]. In the autumn 2021, 45% of Norwegians wished to travel abroad, which was confirmed by the fact that active air bookings to Greece in September 2021 reached -23.1% of 2019[209]. In 2019, the Average Length of Stay decreased by 41% compared to the country's average (9.3 overnight stays per visit compared to 7.4 overnight stays). The Average Per Capita Expenditure in 2020 was 25.6% higher than the Average Per Capita Expenditure recorded for the country as a whole (€751.8 versus €564). The **Average Expenditure per Overnight** in 2020 was 6.1% **higher** than **the country as a whole** (€80.7 versus €67.3)[210].

A change is observed in Norwegian travel trends, notably a **decreased demand for all-Inclusive packages and an increased interest in alternative destinations**. The Norwegians are particularly

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[205] https://www.thinkwithgoogle.com/intl/en-154/consumer-insights/consumer-journey/the-nordic-traveller-travel-habits/
[206] Global social movement against air travel, aiming at reducing the environmental impact of air transport. It started in Sweden in 2018.
[207] Euromonitor, Top Countries for Sustainable Tourism, March 2021
[208] Statistics Norway, Travel survey, August 2021 (here)
[209] INSETE, Recovery Tracker, 20/10/2021 here
[210] INSETE, Incoming Tourism from Norway 2017 -2019, October 2021

interested in **active holidays** and **outdoor activities** on the mountain or at sea[211]. At the same time, **environmental sustainability is an increasingly important factor in the decision of a trip** for Norwegians just like for Swedes[212]. It is noted that in 2021 Visit Norway[213] introduced its tourism strategy for 2030 and commitments for responsible and green travel. The Norwegian government is committed to a 45% reduction in carbon emissions by 2030[214]. Norwegians want to travel abroad to **relax** (46%), visit a **new destination that has always been at the top of their bucket list** (35%) and **return to a favourite destination** (33%)[215]. According to Google, **81% of them book their holidays online**[216] and the most important sources of information is word of mouth as well as friends and relatives.

2.1.12. Denmark

According to Statistics Denmark, in 2020 Danes took 4.2 million international trips (-53.5% compared to 2019). 90% of these were leisure trips(3.8 million, -43.5% compared to 2019), while 10% were for business (423 thousand, -82% compared to 2019). In terms of leisure travel, 25% involved **less than 4 overnight stays** mainly to **Sweden** (42%) and **Germany** (36%), while 75% **were longer than 4 overnight stays** mainly to **Spain** (14%), **Sweden** (11%) and **Norway** (11%). Greece accounted for **4% of international holidays trips for more than 4 overnight stays**[217]**.** In 2020, the **Average Length of Stay increased** by 1.8% compared to the country's average (8.8 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to €657.5, **higher** than the Average Per Capita Expenditure recorded for the country as a whole (€584.4). The **Average Expenditure per Overnight** in 2020 was 10.5% **higher** than **the country as a whole** (€74.3 versus €67.3)[218].

Danes continue to travel during the pandemic preferring **staycations** (61%) mostly due to health restrictions. Nevertheless, **2 out of 5 travellers from the Nordic countries say they are looking forward to travelling abroad when the pandemic ends**, with the **Danes being the most eager** by 51%. Danes want to travel abroad to **relax** (45%), visit a **new destination that has always been at the top of their bucket list** (36%) and **return to a favourite destination** (35%)[219]. In **September** 2021, **active**

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211 Visit Britain, Market and Trade Profile: Norway, February 2018
212 INSETE, Recovery Tracker, 20/10/2021 (here)
213 https://business.visitnorway.com/en/english/#:~:text=Norway%20to%20restart%20tourism%20with%20a%20bold%2C%20greener%20vision&text=One%20of%20the%20main%20initiatives,annual%20transport%20emissions%20by%2010%25.
214 https://www.regjeringen.no/en/historical-archive/solbergs-government/Ministries/kld/news/2021/heilskapeleg-plan-for-a-na-klimamalet/id2827600/
215 YouGov, Nordic travel and tourism webinar On-Demand, October 2021 (here)
216 https://www.thinkwithgoogle.com/intl/en-154/consumer-insights/consumer-journey/the-nordic-traveller-travel-habits/
217 Statistics Denmark, Accommodation, and travel, 11/19/2021 (here)
218 INSETE, Incoming Tourism from Sweden, October 2021
219 YouGov, Nordic travel and tourism webinar On-Demand, October 2021 (here)

air bookings to Greece reached -5.9% of 2019, a historic low[220]. Danes give priority to taking at least two family trips a year. The main factors for this trend are the **harsh Nordic weather** and the perception of **travel as a symbol of social and cultural status**. **Sun and Sea** holidays continue to be the most popular, followed by **City Break** trips which have grown at a fast rate in recent years. There is also an increasing interest in **sports and activities that in nature** (such as cycling, golf and hiking). Finally, vacations in summer residences (privately owned or rented) are also becoming increasingly interesting. 35% travel with their partner or spouse and 31% **on their own**.

Denmark is **a small but wealthy country** with a population of 6 million inhabitants and a GDP per capita of €54,000[221]. Danes spend on average **€2,000** on their summer holidays. Influenced by the pandemic, 3 out of 5 will opt for last-minute bookings. The most important sources of information are **word of mouth and friends and relatives** followed by **price comparison websites** and **information from search engines**. Danes seem to be particularly influenced by videos as 40% of those who consumed such content said that they were inspired for future trips[222].

According to Booking.com's 2021 Sustainable Travel Report, 48% of Danes state that they want to travel more responsibly after the pandemic[223], 72% **want to reduce the waste they produce in their future trips** and 1/3 have already started shopping in small independent businesses to support local economies[224].

2.1.13. Israel

In 2020, there were 69,000 arrivals recorded from Israel, accounting for 0.9% of the country's total, while expenses stood at €53 million representing 1.2% of the country's total. Interestingly, in 2020, travellers from Israel incurred **high travel expenses** in our country in relation to the **Average Length of Stay** and the **total number of arrivals**. Specifically, in 2020 the Average Length of Stay decreased by 41% compared to the country's average (2.9 overnight stays per visit compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 was 28% higher than the Average Per Capita Expenditure recorded for the country as a whole (€769 versus €584.4). The **Average Expenditure per Overnight** in 2020 was 116% **higher** than **the country as a whole** (€265 versus €67.3)[225].

The prompt launch of Israel's vaccination programme in relation to other countries led to the opening of the country in May 2021. Nevertheless, the spread of the Coronavirus Delta variant, coupled with the fact that 27.8% of Israelis are under 14 years old, halted the return to normal resulting in ongoing

[220] INSETE, Recovery Tracker, 20/10/2021 here
[221] https://www.cbi.eu/market-information/tourism/free-independent-travellers-fits/market-potential
[222] Visit Britain, Market and Trade Profile: Denmark, October 2021
[223] Booking.com’s 2021 Sustainable Travel Report

[225] INSETE, An X-Ray of Incoming Tourism 2016-2020 – Market Profile, October 2021

"openings" and "closures" of the market to Greece in 2021. In March 2022, 66.1% of the population is fully vaccinated[226].

According to Statista, about 1/3 of Israel's population is **aged 0-14** (**Gen Alpha and Gen Z**)[227] – digital savvy generations. There is a high penetration of the internet in the country, with 88% of the population **using it and 78.1% being active on social media**. The most popular social medium is YouTube and the most **popular content** is **online videos** (95.6%)[228].

It is also interesting that in 2021 Israel was among the countries with the **highest GDP per capita worldwide** – higher than Canada, Great Britain and New Zealand[229].

2.1.14. Balkan countries

According to the Statistical Office of Albania (INSTAT), in 2019 Albanians took 5.4 million trips (+17.8% compared to 2018), of which 19.4% (960 thousand) were international and 80.6% (4.3 million) domestic trips. The main motivation to take a trip **in 2019 was to visit friends and family** (46.2%), followed by holidays (37.6%). The main international destinations were **Greece, Italy and Kosovo**. In 2020, the most popular destinations for Albanians in Greece, according to the Bank of Greece, were **Epirus, Western Greece and Western Macedonia**; similarly, for Romanians they were **Central Macedonia, Eastern Macedonia and Thrace and Thessaly**. Interestingly, the share of the Romanian market in 2020 accounted for 1.9% of total receipts and the share of Albanian market 2.1%. According to INSETE, **Greece** is **the most popular destination** for outbound trips from **Serbia**, while according to the Bank of Greece, in 2019, the most popular destination in Greece was **Central Macedonia**.[230] According to the National Statistical Institute of Bulgaria (NSI), the main motivation of Bulgarians to travel to Greece were holidays and leisure (41%), other reasons (33%) and business trips (26%). According to INSETE, **Greece is the most popular destination** for outbound travel from **Bulgaria**, while the most popular destinations in Greece in 2019, according to the Bank of Greece,[231] are **Eastern Macedonia and Thrace, Central Macedonia and Western Macedonia**. According to INSETE , **Greece is the most popular destination** for outbound trips from **North Macedonia**, too, while the most popular destination in Greece, according to the Bank of Greece, is expectedly **Central Macedonia**. [232]In 2019, **Romania and Serbia recorded the highest Average Per Capita Expenditure** with €350.3 and €346.7 respectively, while **Bulgaria had the lowest** with €87.1[233]. In 2019, Romania ranked 7th in travel

[226] Israeli Ministry of Health, Dashboard, available here
[227] https://www.statista.com/statistics/526596/age-structure-in-israel/
[228] HootSuite, Digital 2021: Israel, February 2021
[229] https://forbes.co.il/e/israel-is-among-the-top-20-global-economies-in-gdp-per-capita-for-the-first-time/
[230] INSETE, Incoming Tourism from Serbia, 2017-2019
[231] INSETE, Incoming Tourism from Bulgaria, 2017-2019
[232] INSETE, Incoming Tourism from North Macedonia, 2017-2019
[233] INSETE, Market Profile (Romania, Bulgaria, Albania, Serbia, North Macedonia)

expenses (€482m), Serbia 15th (356m), Bulgaria 17th (€338m), Albania 20th (€212m) and North Macedonia 26th (€114m)[234].

According to the World Bank, Western Balkans demonstrate a **positive GDP growth rate**, ranging between 4.1% in 2022 and 3.8% in 2023[235]. Serbia is the **most rapidly growing economy** in the Western Balkans,[236] according to the US Department of Commerce, and its accession to the EU is expected to be completed in 2024. In 2019, the World Bank upgraded Romania to the group of high-income countries, although the pandemic halted the country's upward course. It is noted that Romania's economy was among those that shrank least among the EU countries in 2020 (by 3.9%)[237]. Bulgaria is the country with the lowest wages in the EU and the highest inequalities among OECD countries[238]. Bulgaria is committed to adopting the euro and is expected to join the Euro Area in the coming years. North Macedonia, with a population of just 2 million, is trying to stabilize its economy by investing in natural gas and announcing the closure of its coal-fired power plants by 2027.

Internet and social media penetration in Albania is 69.6% and 55.6%, in Romania 80.7% and 62.6%, in Bulgaria 71% and 62.1% and in North Macedonia 82% and 57.6%, respectively [239].

In 2019, **Bulgaria, North Macedonia, Serbia and Romania** along with Germany were the 5 most important markets of the **Central Macedonia Region** in terms of their share of arrivals[240]. Similarly, **Albania** was the top market based on the number of visits to the **Epirus Region**[241]**.** Albania is also 4th in the number of overnight stays and 2nd in the amount of travel receipts in the Region. Understandably, the majority of travellers from these markets **enter the country by road**.

2.2. LONG HAUL MARKETS

2.2.1. United States

For Americans, **travel and tourism** are increasingly important, and in 2019 they were at the **top** of consumer preferences (Phocuswright U.S. Consumer Travel Report 2020). This preference favoured Greece as well, with the US climbed to the **7th place** in terms of visitors, with **1,179 thousand visitors** and €**1.2 billion** travel expenditure in 2019. Following the inevitable decline during the first year of the pandemic, in the period January-August 2021, travel receipts and travel traffic increased by **371.5%** (from €**86m** in 2020 to **€340m** in 2021) and **127.2%** (from **107 thousand** in 2020 to **211**

[234] dIANEOSIS, The Ideas of the Pandemic (in Greek), November 2020 (here)
[235] https://www.worldbank.org/en/region/eca/publication/western-balkans-regular-economic-report
[236] https://www.trade.gov/country-commercial-guides/serbia-market-overview
[237] https://www.worldbank.org/en/country/romania/overview#1
[238] https://www.oecd-ilibrary.org/sites/281680fe-en/index.html?itemId=/content/component/281680fe-en
[239] HootSuite, Digital 2021, February 2021
[240] INSETE, Annual Report on Competitiveness and Structural Adjustment in the Tourism Sector: Region of Central Macedonia, December 2020
[241] INSETE, Annual Report on Competitiveness and Structural Adjustment in the Tourism Sector: Region of Epirus, December 2020

thousand visitors in 2021), respectively[242]. In 2020, the most popular Greek destination according to the Bank of Greece were **Attica** and the **South Aegean**. In 2020, the Average Length of Stay **increased by 50.8%** compared to the country's average (**13.1 overnight stays per visit** compared to **8.7 overnight stays**) and was the **3rd longest**. The Average Per Capita Expenditure in 2020 amounted to **€807.5**, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The Average Expenditure per Overnight in 2020 was **8.4%** lower than the country as a whole (**€61.7** versus €67.3)[243].

In September 2021, active air bookings to Greece reached **33.2% of 2019**[244]. In 2021, there was a total of **9 scheduled flights** from the US to Greece and it is expected that this schedule will be maintained in 2022. It is noted that as of 01/06/2021, Emirates flies daily from New York to Athens **all year round**. Delta Airlines announced that it **would add Boston** to the existing routes from Atlanta and New York in summer 2022. The market dynamics for Greece are also evidenced by the fact that in August 2021 there was a 20% increase in the number of available direct flights from the US compared to August 2019[245].

Affordability, **cleanliness**, **location**, and **safety** were the top priorities for American travellers in 2021. Work developments coupled with incentives offered by hospitality businesses favour workcations with **59%** of Americans expressing the desire to become **digital nomads** or **work remotely** from a **long haul destination** and with higher rates at the ages **18-34 (74%)** and among **families (69%)**[246]**.** Finally, **supporting local communities** is very important for **72%** of Americans when they travel[247]**.** According to Booking.com, **54%** of Americans would appreciate a website with information on **destinations** where the **rise of tourism** would have **a positive effect** on **local economies (2021)**.

Expectedly, in the past period the majority of Americans showed a clear preference for **leisure trips within the US** and at **short distances** that can be driven by **car**. The **rise in vaccinations**, **the gradual lifting** of **travel restrictions** and the widespread recognition that travel **helps personal health** and **well-being** (76%[248]) boost the demand for international travel with the prospects for Europe and Greece improving significantly for 2022.

According to Ipsos, 30% of Americans **dream of taking** their next trip to Europe[249]. According to the European Travel Commission (ETC), Greece is the **6th preferred European country** in the last 4 months of **2021**, with France, Italy, Great Britain, Germany, Spain, Switzerland, Ireland/Austria and Belgium/Denmark making up the remaining top ten. **44%** prefer **cities/metropolitan centres, 39%** the **coast** and **breach resorts** and **26%** the **countryside and rural areas**[250].

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[242] Bank of Greece, Developments on Travel Balance of Payments: August 2021, October 2021
[243] INSETE, Incoming Tourism from US, October 2021
[244] INSETE, Recovery Tracker, 20/10/2021 here
[245] Delta in Boston: New routes, new planes and more choice than ever, October 2021 (link)
[246] Sonder and Ipsos, Americans are ready to travel, according to new survey results, August 2021 (link)
[247] American Express Travel. Global Travel Trends Report, 2021
[248] Booking.com, Travel predictions 2022, October 2021
[249] Ipsos, What is the Future? February 2021
[250] European Travel Commission, Long-Haul Travel Barometer 3/2021 Travel Horizon: September-December, September 2021

According to Portrait of American Travellers[251], **32%** of Americans with short-term travel plans for European destinations belong to **Baby Boomers** (67-75 years old) followed by **Millennials**. It is also interesting that **74%** of Americans who will choose Europe in 2022 will travel as **couples**. However, there is also a large group of Boomers who will travel with parents, grandparents and children (**multigenerational travellers**).

Short-term travellers tend to be a more diverse group than typical American travellers in Europe with **17%** being **African-American**. It is noted that these leisure travellers from the US spent a total of **USD 109.4 billion** on trips in 2019, while according to Ipsos **they mostly dream** of visiting a **luxury resort** (36%) and an **all-inclusive resort** (36%) compared to other groups of Americans (white and Hispanic). Those who will travel to Europe in 2022 prefer **package holidays** or **all-inclusive cruises** at a higher rate than the typical visitor to Europe with **55%** stating that they will book through a travel agent (the rate drops to 36% in total). Finally, this group is more likely to choose **luxury travel** by **38%** (24% in total) and is interested in **gastronomy** by **68%** (58% in total)[252].

2.2.2. Canada

According to Statistics Canada, in 2020 Canadians took 5.1 million international trips (-81.1% compared to 2019, 2019) involving at least 1 overnight stay. 48% of international trips were to the US and the remaining 51% to overseas destinations. The key motivation for travelling were holidays (56%), visiting friends and family (26%) and business trips (14%). Arrivals from Canada to Greece in 2020 were limited to **32,817** and receipts to **€40 million** (in 2019, they rose to €321 thousand and €343 million, respectively). The market share in terms of arrivals was **0.4%** in 2020 versus **1%** in 2019. In 2020, the Average Length of Stay **increased by 177.4** compared to the country's average (**24.1 overnight stays per visit** compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to **€1,228.3**, higher than the Average Per Capita Expenditure recorded for the country as a whole (€584,4). The Average Expenditure per Overnight in 2020 was **24.2%** lower than the country as a whole (**€51** versus €67.3)[253].

In September 2021, active air bookings to Greece reached **-20.6% of 2019**[254]. In 2022, Air Transat plans to operate 3 flights weekly to Athens International Airport[255], complementing the Air Canada flight schedule, which connects the Greek capital with Toronto and Montreal and will start in April for the next season[256]. Indicative of Canada's importance for Greek tourism is the cooperation of the Athens Development and Destination Management Agency (ADDMA) with the Canadian agency Reach Global Marketing for the targeted promotion of the city (online and offline) on major Canadian media, as well as participation in Media Events in Canada in February 2021. According to Destination Canada, the

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[251] MMGY, Portrait of American Travelers® “Summer Edition”, 2021 (link)
[252] MMGY, Portrait of American Travelers® “Summer Edition”, 2021 (link)
[253] INSETE, Incoming Tourism from Australia, October 2021
[254] INSETE, Recovery Tracker, 20/10/2021 here
[255] Air Transat, Flights to Athens (link)
[256] Air Canada: Air Canada Unveils Plans For Its Summer 2022 Schedule To Europe, Africa, The Middle East and India (link)

regions where residents feel safer to travel abroad are 36% in Quebec, 35% in Alberta and Saskatchewan/Manitoba and 30% in Ontario[257].

Canadians are expected to prefer **less crowded destinations** that have effectively managed the pandemic and **protect their natural and cultural heritage**. According to the European Travel Commission (ETC), Greece is the **5th preferred European country** in the last 4 months of **2021**, with France, Italy, Great Britain, Italy, Germany, Spain, Belgium, the Netherlands, Switzerland ,and Denmark making up the remaining making up the remaining top ten. **50%** prefer cities and metropolitan centres**, 32% Sun and Sea** and **breach resorts**, **22% countryside and rural areas** and **21%** mountains[258].

Work developments coupled with incentives offered by hospitality businesses favour workcations with 50% of Canadians stating that they are willing to work remotely to extend the duration of a trip to a new destination. **Supporting local communities** is very important for **72%** of Canadians when they travel[259]**.** According to Booking.com, **16%** of Canadians are going to research into how their tourism spend will affect or improve local communities; **73%** state that they look forward to equally enjoying a trip to a destination as part of the overall experience; **79%** want to travel to enjoy the nice weather and sunshine; **51%** to explore new cultures and enjoy new places and experiences; and **50%** to get away from the routine of home life. Finally, **74%** of Canadians say travel helps their mental and emotional wellbeing more than other forms of self-care[260].

2.2.3. Australia

Travel is important for Australians with 2 out of 5 making an international trip in 2019 (a total of 11.3 million) spending **AUD 2,552 Australian per person**[261]. The key reasons for travelling in 2019 were **holidays** (57%), **visiting friends and family** (26%), **business trips** (8%) and **other trips** (9%). Since March 2020, Australia has implemented the strictest restrictive measures in response to the pandemic, prohibiting its citizens from travelling abroad. According to the government, as of November 2021 Australians can travel for **the 1st time** since the start of the pandemic to countries with 80% COVID-19 vaccination rate **- and to Greece**. As expected, arrivals in 2020 were limited to **28,595** and receipts to **20 million** (compared to 338,561 and €371 million, respectively, in 2019). The market share in terms of arrivals was **0.4%** in 2020 versus **1.1%** in 2019. In 2020, the most popular Greek destination, according to the Bank of Greece, was **Attica**. In 2020, the Average Length of Stay **increased by 72.4** compared to the country's average (**15 overnight stays per visit** compared to 8.7 overnight stays). The Average Per Capita Expenditure in 2020 amounted to **€714.9**, higher than the Average Per Capita

[257] Destination Canada, Resident Sentiment / Opinion des residents, November 2021
[258] European Travel Commission, Long-Haul Travel Barometer 3/2021 Travel Horizon: September-December, September 2021
[259] American Express Travel. Global Travel Trends Report, 2021
[260] Booking.com, Travel predictions 2022, October 2021
[261] Deloitte – Tourism Australia, The value of tourism. June 2021

Expenditure recorded for the country as a whole (€584,4). The Average Expenditure per Overnight in 2020 was **29%** lower than the country as a whole (**€47.8** versus €67.3)[262].

Interestingly, as **1 in 3 Australians** was born abroad, trips to visit friends and family are expected to increase now that borders have been opened after 18 months of lockdown. Specifically, **75%** of Australians report that they wish to travel to reconnect with loved ones they could not see in 2020. According to the 2016 census, there are **93,745 people in Australia who were born in Greece**; **1.8%** of the general population stated that they were of **Greek descent** and there are **237,588 Greek-speaking Australians in total**[263]**.** Work developments coupled with incentives offered by hospitality businesses favour workcations with **68%** of Australians stating that they are willing to work remotely to extend the duration of a trip to a new destination. **Supporting local communities** is very important for **79%** of Australians when they travel[264]**.** According to Booking.com, **35%** of Australians are going to do more research into how their tourism spend will affect or improve local communities, and **67%** want to travel to lesser known 'off-the-beaten-path' destinations.

82% of Australians report that their travel helps their mental and emotional well-being more than other forms of self-care[265]. According to News Corp Australia, interest in international destinations has increased considerably in the last four months with **38%** of traffic coming from abroad (the previous two quarters it has dropped to 19%). The top 3 international destinations for the next 12 months are New Zealand, the USA and the UK. 50% of Australians are still distrustful of international travel, but **age groups under 40** are quite interesting – **70%** of Australians aged **18-39** want to travel overseas to a greater or lesser degree. The main travel incentives are **safety**, **reliability**, **customer service** and trip **value**, while low prices rank 9th out of 13. Finally, **1 in 3 Australians** states that due to the complexity of travel regulations they will seek **professional support** in planning their next getaway[266]. It is also interesting that **78%** of Australians believe that "vaccine passports would be effective in making travel safe"[267]. Based on the latest data, **95%** of Australians over 16 years of age are fully vaccinated (2 doses)[268].

Finally, following a long period of lockdown, **78%** state that they look forward to equally enjoying a trip to a destination as part of the overall experience; **85%** want to travel to enjoy the nice weather and sunshine; **52%** to explore new cultures and enjoy new places and experiences; and **51%** to escape from everyday routine and change their setting.[269].

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[262] INSETE, Incoming Tourism from Australia, October 2021
[263] Australian Bureau of Statistics, 2016 Census, 2017 (link, link and link)
[264] American Express Travel. Global Travel Trends Report, 2021
[265] Booking.com, Travel predictions 2022, October 2021
[266] News Corp Australia, Consumer Travel Trend Forecast – January to June 2022, October 2021 (link)
[267] Ipsos, Global Views On Personal Health Data And Vaccine Passports, April 2021
[268] Australian Government, Department of Health, Vaccination numbers and statistics, April 2022 (link)
[269] Booking.com, Travel predictions 2022, October 2021

According to the Hellenic Statistical Authority, in 2020, 3.8 million Greeks travelled and took 5.8 million trips – reduced by 22% compared to 2019 – and spent €1.8 billion. Most personal trips were made by **land transport** (3.5 million trips) and, secondarily, by sea (0.8 million trips). 65.9% of personal trips took place **in non-rented accommodation**, mainly **privately owned holiday homes** and **accommodation provided free of charge** by relatives and friends. These trips account for 82.4% of the total number of overnight stays. Travel with **accommodation in privately owned holiday homes** rose by 26.9% and the corresponding overnight stays by 18.3% in 2020 compared to 2019. For personal trips in **rented accommodation** (34.1% of personal trips), the main of accommodation type was hotels and similar establishments by 58.0%. Trips with accommodation in hotels and similar establishments decreased by 38.2% and the corresponding overnight stays by 29.4% in 2020 compared to 2019. The age groups that travelled and spent the most were **25-44** (1.6 million trips/€5 million) and **45-64** (1.7 million trips/€5.8 million). **Most travellers aged 15 and over travelled domestically** with only 5.9% travelling abroad to **Albania, Germany, the UK, Italy, and Bulgaria**[270]**.** It is noted that Greeks traditionally travel domestically by **land transport** using mostly a **private or rented car**[271]. Finally, it is noted that in 2020, could take a week of holidays for **economic reasons** at a rate of 50.4% and for **safety reasons** at a rate of 47.4%.

The pandemic has raised awareness among Greeks of the need for businesses and brands to have a **positive impact on society and the environment**. Almost three out of four consumers (73%) believe that brands **should behave ethically** and in line with the expectations of society; 71% believe that the **behaviour of a business is as important as its products/services**; and 66% believe that businesses have the obligation to **be catalysts of positive change** in the world. However, less than one in four (24%) state that they are satisfied with the existing actions and initiatives taken by businesses for the environment, society, etc. The areas in which Greeks believe they will spend more after the pandemic are travel (53%), outdoor recreation (47%) and clothing and footwear (34%). Interestingly, 23% state that they **have changed businesses from which they shop to support their local economy**, businesses, and neighbourhood stores. Finally, the Greek consumers are probably **more ready to punish businesses** that betrayed their trust. Almost three out of four consumers (63%) say they **have decided to stop buying** or using products or services of a business that, **through some action, has led them to trust it less than before**. One in four believe that it will **take years to return to the pre-pandemic economic situation,** while a return to entertainment (56%), **holidays** (48%) and socializing (56%) is estimated to be **relatively slower**[272].

Finally, according to Focus Bari/YouGov, after the pandemic Greeks wish to continue **spending time with their family** at a rate of 83%, **exercising in nature** at a rate of 72% and **reading books** at a rate of 66%. 1 in 5 are passionate about travelling (20%) and exercise at least 2-3 times a week (22%). Greeks

[270] Hellenic Statistical Authority, Survey on Qualitative Characteristics of Resident Tourists (Vacation Survey): 2020, July 2021
[271] INSETE, Travel Characteristics of Domestic Tourists 2019, February 2021
[272] EY, Future Consumer Index Greece 2021, May 2021

travel primarily with **their family** (53%) and secondarily with their partner (30%), and 1 in 2 (59%) travels **once a year** [273].

[273] Picodi, time to relax. June 2019 (here)

ANNEX 3: THE "GREEN" TRANSITION OF GREEK TOURISM

Adaptation to climate change and the green transition are currently the most important challenges. In recent years sustainability has been an increasingly used term both in the context of institutional initiatives and investment programmes as well as in people's everyday lives. **States set ambitious targets such as the European Union's commitment to become the first climate-neutral economy by 2050** (Paris Agreement). Consumers, for their part, report to surveys in recent years that they are willing to adopt increasingly sustainable practices. In 2020, **72% of consumers from Europe and the US and 84% of consumers from China stated that they believe their own behaviour can make a difference in tackling the climate crisis**[274]. In the same survey, 40% of Europeans said they could stop using the air travel to help tackle the climate crisis. According to the European Travel Commission, 3 out of 5 travellers are now willing to travel less and spend more time in one place. This statement is of particular importance as 75% of carbon dioxide emissions in travel come from transportation. At the same time, 30% of Europeans are prepared to spend more on green luxury travel, recognising the need to reduce their own carbon footprint[275].

According to Euromonitor, in Europe currently sustainability actions are taken not only by institutional and civil society organisations but also by businesses. Specifically, in 2021, **57% of the businesses involved with travel,** that participated in the International's Voice of the Industry Survey, stated that they **implement actions** that take into account **the United Nations Sustainable Development Goals** (SDGs)[276].

In recent years, Greece has been taking actions to implement its commitments as a European Union member state and to align itself with the current trends in terms of the need of destinations and businesses worldwide to demonstrate strategies on environmental protection and adaptation to climate change. As the Minister of Tourism, Vassilis Kikilias, stated in November 2021, it is a **strategic decision of the Greek Government to transform Greece into a model country of sustainable tourism development**. Greece plans to move "to a more sustainable tourism model, which takes into account a number of factors for environment protection, promotion of authenticity, connection with the primary sector, enhancement of the visitor's experience and aims at promoting the country as a global model of sustainable tourism development".

The Greek Government is introducing, adopting or supporting a number of initiatives to put this commitment into practice. In January 2022, the establishment of the "**Untrodden Mountains" initiative was presented placing six Greek mountains under enhanced environmental protection**: Lefka Ori (White Mountains) in Crete, Taigetos in the Peloponnese, Mount Saos in Samothrace, Mounts Timfi and Smolikas in the Pindos region, and Mount Chatzi in Thessaly. Hence, these mountains are Roadless Areas (RA) . In these areas, including Mount Olympus for which the

[274] European Investment Bank, 2020-2021 EIB Climate Survey, May 2021
[275] European Travel Commission, Europeans' Attitude Towards Sustainable Choices, June 2021
[276] European Travel Commission, Sustainable Travel in an Era of Disruption, January 2022

Presidential Decree on the protection of its National Park was issued, "land can no longer be plotted, no new roads can be aligned, and no wind turbines be installed"[277].

In Greece, in June 2021, diaNEOsis signed an MOU on the elaboration of a study on **the National Strategic Plan for the Organization and Development of Tourism in the Areas of the Natura 2000 Network**. The initiative is funded exclusively by the organisation and consists of designing a series of actions aiming **at the promotion of protected Natura 2000 Network areas** and the **promotion of alternative forms of tourism** in them[278]. The European Natura 2000 Network is a Community-wide network of nature protection areas, which aims at ensuring the long-term conservation of its most valuable and most endangered species and habitats at a satisfactory level. In Greece, the list includes 296 areas – "Scientific List" – at different protection levels[279].

Major initiatives by both institutional bodies and private entities have also been announced for Greek islands, which are the most iconic tourist destinations in the country. The beginning was made with the announcement of the Chalki's transformation into a model of sustainability and sustainable growth through investments in RES, energy saving, environment, waste management, digital technologies, and sustainable transport in July 2021[280]. The action is part of the **GR-eco Islands national initiative aiming at promoting an integrated green transformation of small islands, which will sign a charter of commitments that includes areas such as use of RES, energy efficiency, sustainable waste, and water management, zero pollution mobility and "greening" of tourism, through specific subsidies and programmes of the Ministry of Environment and Energy**[281]**.**

In 2021, the comprehensive study on the "Astypalea 4.0" strategic development plan was also announced, which seeks to highlight the island as an economically, socially, and environmentally sustainable destination for residents and tourists[282]. Astypalea was also selected by the Greek Government and Volkswagen Group in 2020 for the "**Smart and Sustainable Island**" project implemented for the first time on an Aegean island. The project focuses on an **integrated e-mobility plan**, the introduction of innovative on-demand transportation services, the promotion of RES and the testing of new autonomous driving technologies[283].

Finally, in 2021, the Minister of Tourism stated that the Ministry was carrying out ***a "special study to ensure the sustainable growth of the two household brands of the tourism country's product, Mykonos and Santorini***". The action plans drawn up for the two destinations include proposals for interventions such as the construction of a new port in Monolithos of Santorini; the elaboration of a plan for the transition to integrated waste management in Mykonos; the strengthening of the share

[277] Ministry of Environment and Energy, Untrodden Mountains, January 2022 (available here in Greek)
[278] Ministry of Environment and Energy, Announcement of actions for environmental protection and ecotourism, June 2021 (available here in Greek)
[279] Ministry of Environment and Energy, Natura 2000 Network, January 2000 (available here in Greek)
[280] Ministry of Environment and Energy, GR-eco Island 1 – Chalki, July 2021 (available here in Greek)
[281] Ministry of Environment and Energy, Chalki becomes the first GR-eco island, July 2021 (available here in Greek)
[282] Deloitte Greece, Study on the Sustainable Development of Astypalea, September 2020 (in Greek)
[283] Ministry of Foreign Affairs, Transforming Astypalea into the first smart, green island in the Mediterranean with energy autonomy, November 2020 (available here)

of renewable energy sources in electricity supply; and the interconnection with the mainland electricity grid[284].

Additionally, the cooperation between leading tour operator TUI Group and the Greek Government for the launch of '**The Rhodes Co-Lab' with the aim to develop Rhodes into an international beacon for the sustainable development of holiday destinations**, with a **5-year** implementation period, is another important initiative showcasing the Greek government's commitment to the tourism product[285]. Rhodes is a destination that has been **closely linked to mass tourism** and the rapid growth of the previous decades. At the same time, the **strategic involvement of one of the top tour operators** in the world fully confirms the importance of the green transition both in consumers' minds and in investors' plans. Finally, in view of Greece's Presidency of IUCN in 2023 to implement the action plan of the French initiative "Coalition for an Exemplary Mediterranean in 2030", the Prime Minister referred[286] to the country's goals for the protection of the seas. These include **50% reduction of plastic litter** polluting the sea **by 2030** and **a ban on fishing in 10% of its seas** to better protect and reinforce the Mediterranean ecosystems, which has been affected by overfishing[287].

On the other hand, private initiative in Greece has some interesting **sustainability projects to demonstrate in Greek hotels**. In 2020, a survey conducted by the Research Institute for Tourism (RIT) of the Hellenic Chamber of Hotels (HCC) showed that only 48% of Greek hotels record energy consumption; **67% set energy saving targets** with 28% reduction on average across all hotels in the country regardless of their operation. 30.9% of all hotels, accounting for 2,954 units, have invested in water saving actions in the period 2015-2020. In 2020, only 13% had any sustainability certification, while **79% stated they were interested in obtaining** one. [288]. The findings of the survey document the **willingness to invest in sustainable practices** by Greek hotels, which **already apply to a limited extent**. World-class organisations such as the WWF are implementing **training programmes on food waste reduction** in cooperation with hotels[289]. Certain tourism enterprises develop and implement **carbon neutrality** strategies, with a range of different programmes that will gradually implemented by 2024.

Following the above, it can be concluded that, in response to the international trend, both institutional bodies and the private sector in Greece are increasingly taking initiatives to adopt and/or establish sustainable practices in destinations of the country. **However, it is worth mentioning that in many cases initiatives are mostly at early stage of development and strategic planning with undefined or open-ended implementation horizon**.

The inclusion of these actions in **financial instruments such as the National Recovery and Resilience Plan, Greece 2.0,** and the adoption of commitments to meet specific quantitative targets by 2030 are on the positive side. However, there is concern about how these commitments will be fulfilled in the

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[284] Ministry of Tourism, V. Kikilias: The priority of the Government is the sustainability and sustainable growth of Greek Tourism, December 2021 (available here in Greek)
[285] TUI, "The Rhodes Co-Lab": TUI and Greece launch futures lab for sustainable tourism. January 2022 (available here)
[286] https://www.amna.gr/home/article/582502/Kur-Mitsotakis-I-Ellada-tha-analabei-to-2023-tin-Proedria-gia-tin-efarmogi-tou-schediou-drasis-gia-tin-protoboulia-Mesogeios--mia-upodeigmatiki-thalassa-eos-to-2030-binteo
[287] One Planet Summit, Coalition for an exemplary Mediterranean in 2030, (available here)
[288] RIT, Planning a Sustainable - "Green" Hotel, March 2021 (available here)
[289] WWF Greece, Guide to limiting food waste in Greek hotels (available here in Greek)

light of the current geopolitical situation and the imminent energy crisis, which is expected to delay globally the implementation of pledges to reduce lignite dependence[290]. This is a challenge affecting all countries, which also reflects the diverging views of consumers worldwide.

As stated by the European Travel Commission, there is a **gap between consumers' willingness to adapt their behaviour to climate change and their ability to do so by taking specific decisions**. Consumers are aware of the impact of their behaviour but are unable to fulfil their commitments in everyday life. In practice, this means that people generally want to be "ethical" but do not want to pay more or sacrifice some of their amenities to achieve this. It is therefore a key objective of all sustainability actions and strategies to constantly educate consumers in understanding this gap between their values and their behaviours and to help close it[291].

[290] Economist Intelligence Report, Five Ways in which the war in Ukraine will change business, March 2022 (available here)
[291] European Travel Commission, Encouraging Sustainable Tourism Practices, September 2021

ANNEX 4: EUROPEAN TRAVEL COMMISSION DATA ANALYSIS | MONITORING SENTIMENT FOR INTRA-EUROPEAN TRAVEL

Attached in a separate file.

ANNEX 5: PRIMARY RESEARCH RESULTS ON THE GREEK MARKET

Attached in a separate file.

ANNEX 6: SOCIAL LISTENING RESULTS FOR GREECE AS A TOURIST DESTINATION (2019-2021)

Attached in a separate file.

ANNEX 7: INTERVIEW GUIDE | KEY CONCLUSIONS FROM THE STAKEHOLDER CONSULTATION

Attached in a separate file.