



Greek Tourism Strategy: 2021 Roadmap

Focus on seasonality



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Presentation outline

- The target for Greek Tourism sector towards 2021
- 4 key opportunities
- 6 core products
- Priorities in order to fight seasonality

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The target for Greek Tourism sector towards 2021

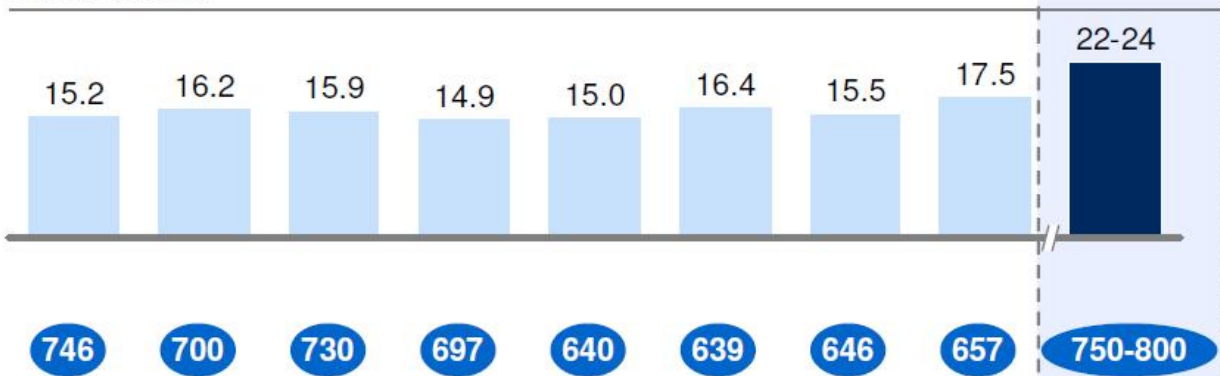
Break the trend of massification
(higher traffic but stable revenues)
&
reposition Greece globally

The target for Greek Tourism sector towards 2021

x Average spend per visit

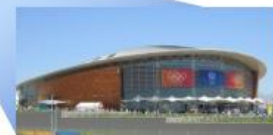
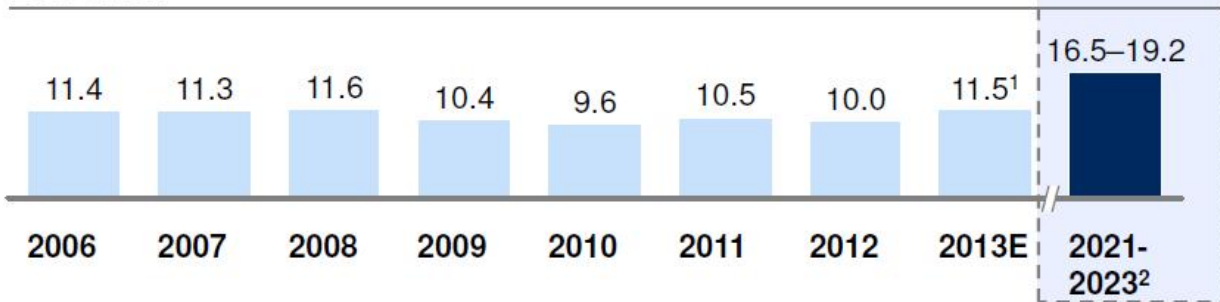
International visitor traffic evolution

Million arrivals



International revenue evolution

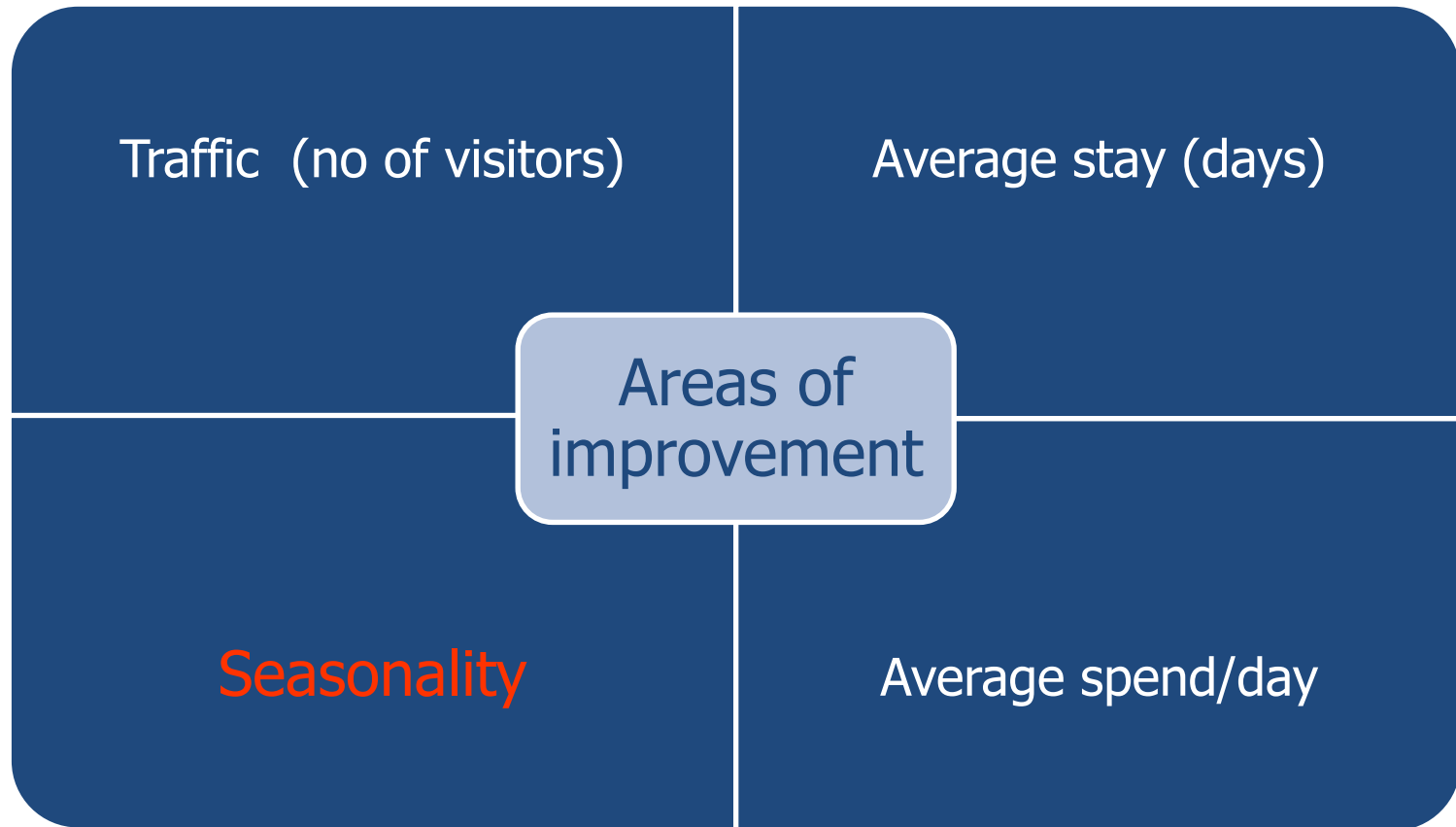
EUR billion



2021-2023²

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The aim is to address 4 key opportunities



The logo for SETE (State Enterprise for Tourism Exploitation) consists of the letters 'SETE' in a bold, white, sans-serif font, centered within a dark blue rectangular box with rounded corners.

Tourism strategy definition

A large, dark blue callout box with rounded corners and a pointed top-left corner, containing white text. It is positioned below the title and above a decorative footer.

6 core products
have been structured to define the
tourism strategy for Greece

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Sun & Beach

Nautical Tourism

City Break

Medical Tourism

Cultural and religious

MICE



Enabling products

Agro-, Eco-,
Gastro-

Activities-based

Other niche products

Elderly

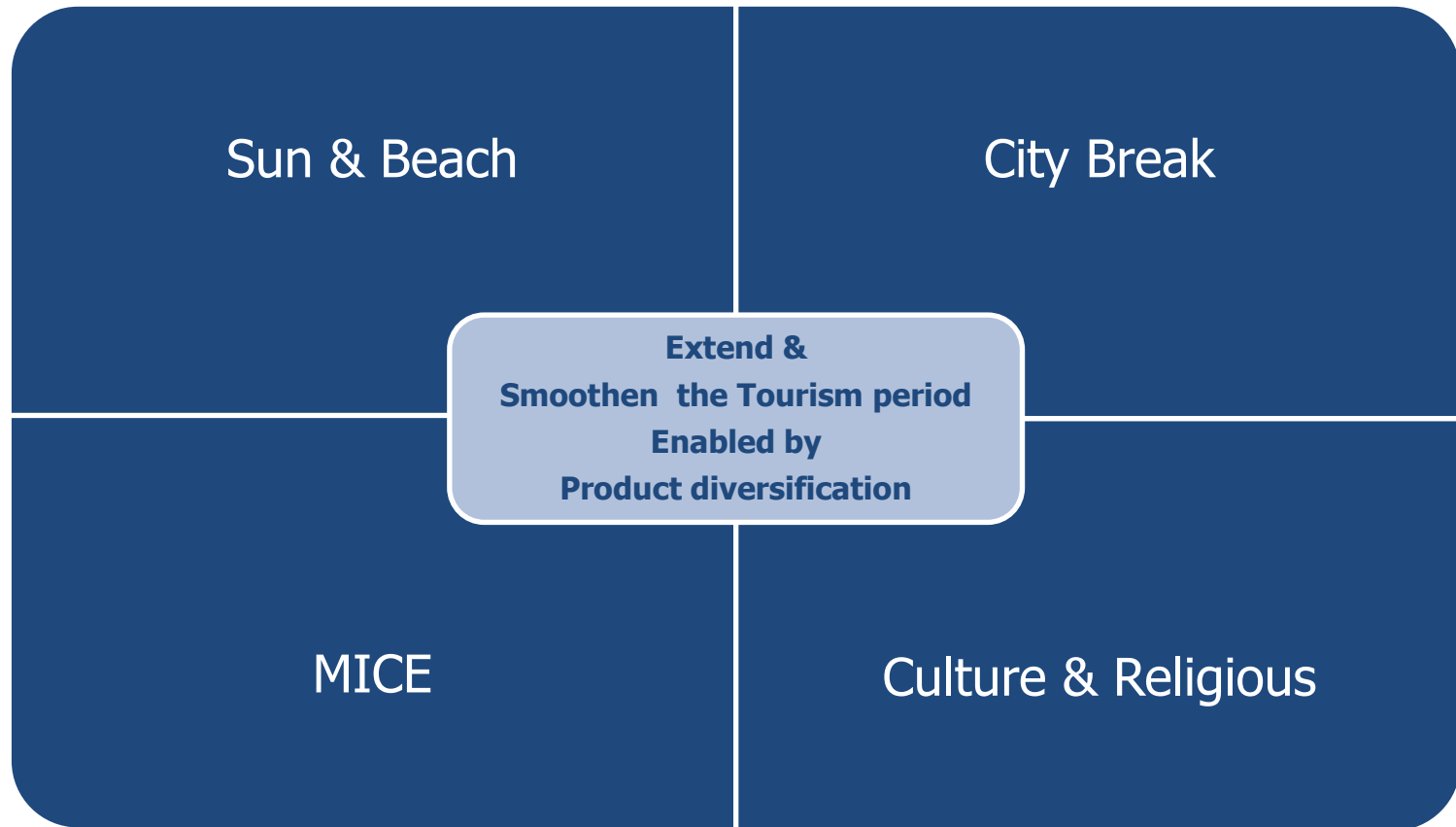
Wellness/
lifestyle

Visiting friends
and family

'Enabling' and 'niche' products can alternatively act as core products in selected geographies which do not possess strong affiliation to or proposition based on the 6 core products



Fighting against seasonality



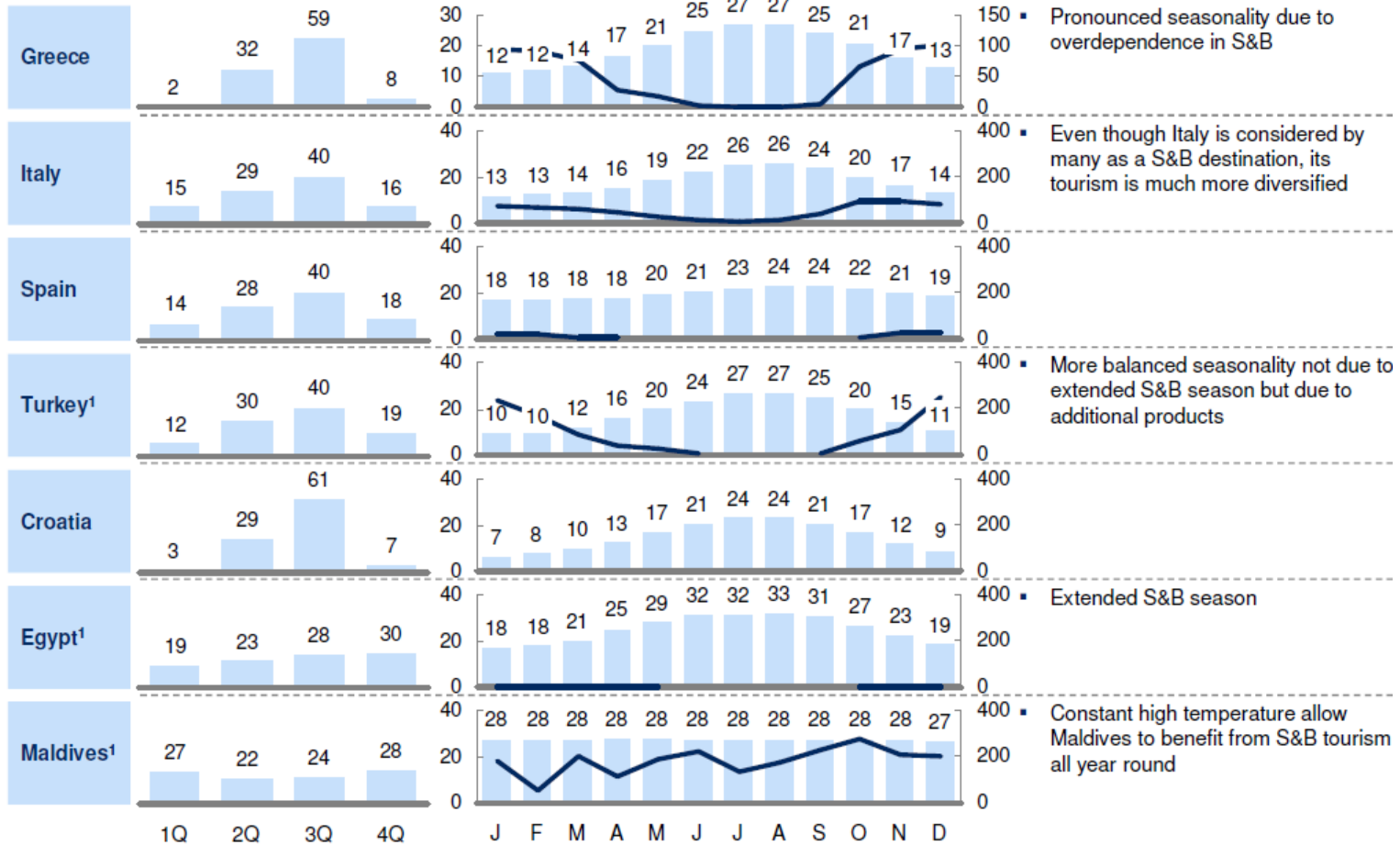


█ Average Precipitation
█ Average Temperature

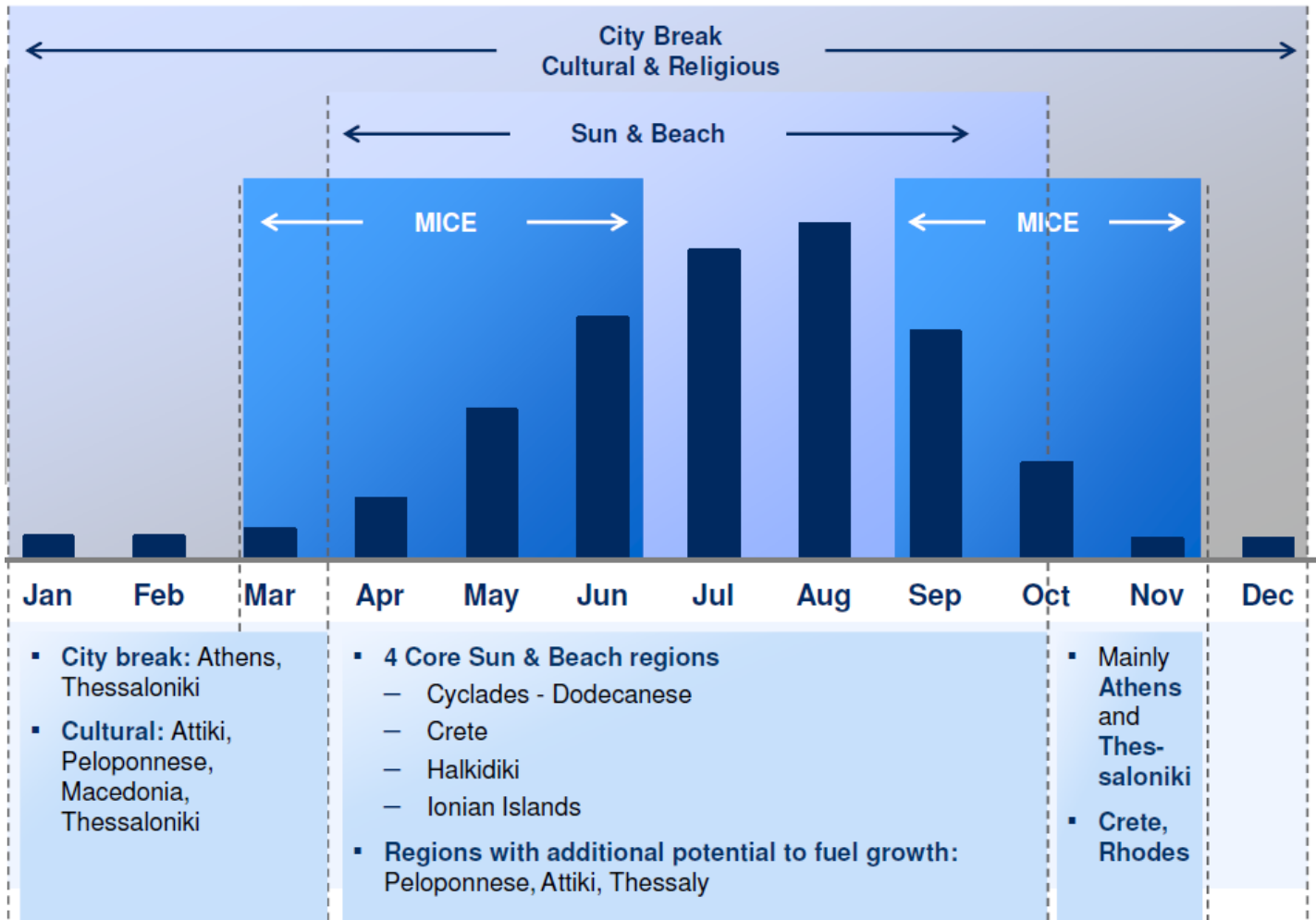
Overall tourism seasonality
% annual overnight stays, 2011

Typical weather pattern at top country S&B destinations

Remarks



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Key priorities and interventions to shape and enhance the **Sun & Beach** product and Greece's value proposition



Structure and prioritize sub-products, enabling transition to higher class and spending profiles



Strategically prioritize markets based on their spending profile, gap vs.competitors and future potential



Proceed with **targeted transportation interventions** (airports capacity and services, hub and spoke sea transport)



Establish a 3-tier accreditation scheme:
-Revised quality accreditation (stars, keys)
-Unique characteristics definition and accreditation
-Introduction of **'Themes'**, shaping USPs



Review accommodation capacity development incentivization to enable quality mix change, upscaling and more balanced growth



Structure **product development** and promotion efforts along 3 axes:
Destination, Segments, Theme



Themes

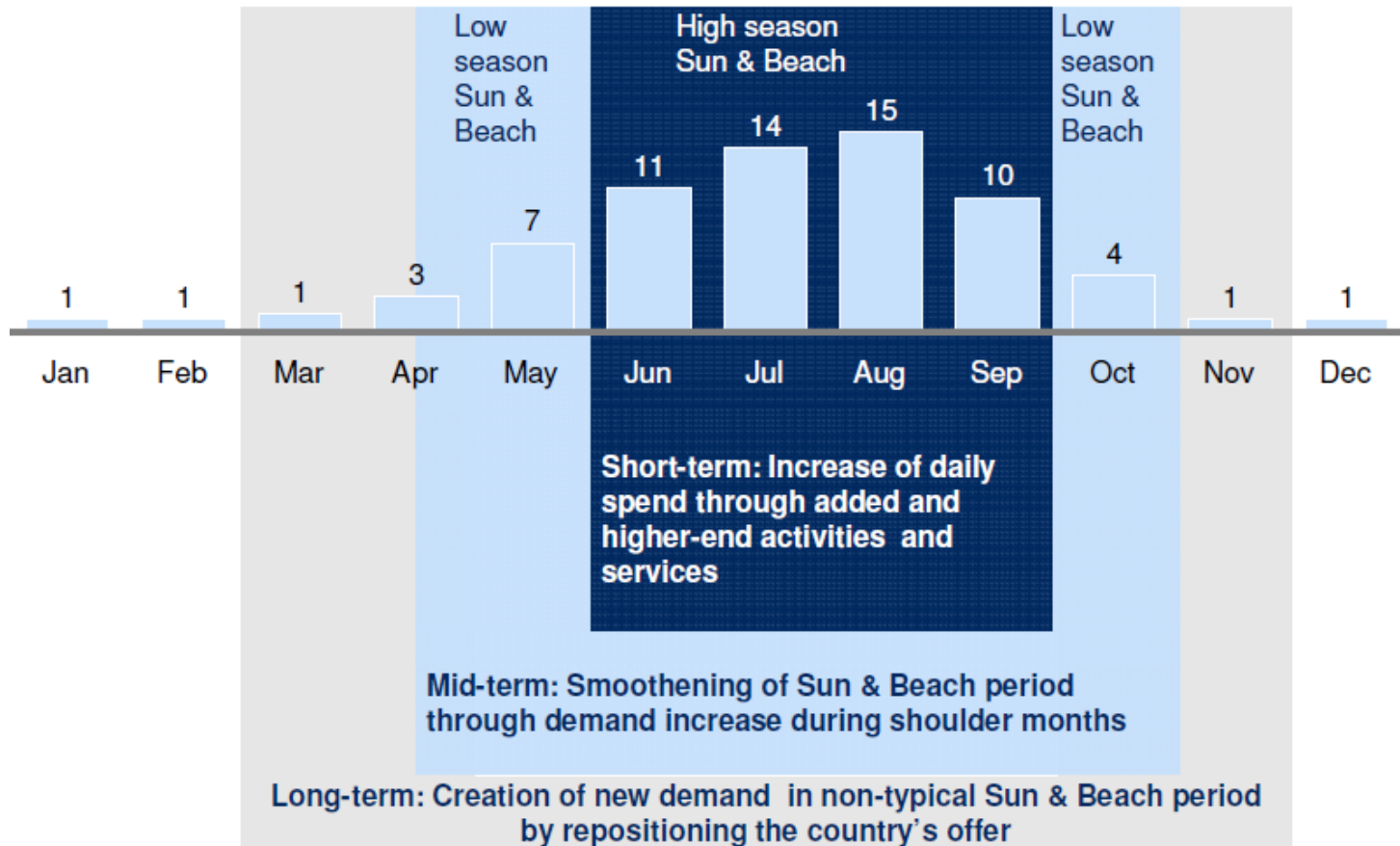
Structured application of Themes serves a double objective: **Spend increase** at peak season (short-term) and **period expansion** (mid-term)



Themes

Tourism seasonality

Visitors arrivals at hotels (percent of annual total)





Themes: the example of Canary Island



Families with children



Couples



Seniors



Young



Relaxation



Know the area



Activities



Nautical tourism



Gay



Loyal visitors



Price conscious visitors



Key priorities and interventions to shape and enhance the **City break** product and Greece's value proposition



Focus on the 2 metropolitan cities with **direct flight connections** to key source markets (Athens and Thessaloniki)



Structure a 3-tier strategy to shape USPs for Athens and Thessaloniki:

- Develop a comprehensive **events calendar**
- Develop **'thematic walks'**
- Leverage the coastline



Focus on ensuring **the basics**



Launch/upgrade a **'city card'** value proposition, building upon the ongoing effort of 'pic Athens spotlighted'



Key priorities and interventions to shape and enhance the **MICE** product and Greece's value proposition



Effectively address the 'big 3' sectors of the conferencing industry i.e., healthcare, technology, science corporations and leverage country affinity with specific niche sectors (e.g., agriculture, transport/logistics)



Focus on small and medium scale events (events with <1,000 participants represent >85% of total) and initiate outreach and targeting from annually rotating events (>55% of total rotating events) with a structured, 'account management' approach



Fully leverage existing city/urban capacity in the short term (esp. hotels), as well as select alternative infrastructure (e.g., museums, theaters)



Leverage the planned Tae-Kwon-Do mega-center as a product flagship and brand/status enhancing development



Enhance coordination and reinforce Governance and bidding process for MICE events



Key priorities and interventions to shape and enhance the **Cultural** product and Greece's value proposition



Focus on utilizing Cultural Tourism as an **add-on**/horizontal element (esp. through Themes)



Leverage Cultural Tourism as a **standalone product primarily** for destinations with no strong Sun & Beach value proposition, to enhance regional relevance of the Tourism products



Prioritize and **upgrade top archeological and heritage sites**, aiming at offering worldclass supporting infrastructure (focus initial efforts to the top 25 sites and top 15 museums capturing ~80% of visits)



Upgrade the **museum offering** for top 15 museums, through targeted interventions



Re-organize **major events and festivals** to enhance appeal to international audiences

Design and shape a set of "**experiences**"



Utilize **technology**

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In addition, addressing high seasonality ..

... increases the
investment attractiveness



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