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Measuring and monitoring the sustainable development of coastal and maritime tourism

A REPORT OF THE CONSULTATION WITH
NATIONAL, LOCAL AND MEDITERRANEAN
STAKEHOLDERS

GENERAL DIRECTORATE FOR TOURISM POLICY, DIRECTORATE FOR RESEARCH,
DEPARTMENT FOR RESEARCH STUDIES AND DOCUMENTATION |

Measuring and monitoring the sustainable development of coastal and maritime tourism

*A report of the consultation with national, local
and Mediterranean stakeholders*

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Short methodological note

The Directorate for Research of the Ministry of Tourism of Greece conducted consultation with local (the island of Corfu), national and Mediterranean stakeholders from April to May 2021 on measuring and monitoring the sustainable development of coastal and maritime tourism.

Consultation included three focus groups where stakeholders gathered around:

- to discuss the challenges for the sustainable development of coastal and maritime tourism,
- to acknowledge the need for effective monitoring and measuring of coastal and maritime tourism for evidence-based policy making,
- to identify the corresponding gaps, needs and options for sustainable coastal and maritime tourism governance and management.

We conducted an overview of the ongoing international debate on the subject to identify the main points for discussion. Research via focus groups was chosen to highlight the opinions of stakeholders and collect primary data on the existing situation, the problems, and the proposed policy measures. Three focus groups were held with stakeholders at the national, Mediterranean, and local level (Corfu). The island of Corfu was chosen as a case study because of the ongoing initiative of the municipality of Central Corfu and Diapontia Islands to join forces with the Global Sustainable Tourism Council (GSTC) and CLIA to assess their sustainability status and to map out a plan for a future of sustainable tourism on the island.

Focus groups were conducted via videoconference and were recorded with the explicit consent of the participants for the purpose of the research. Below you may find a list of key informants. Stakeholders were invited to express their opinions on the following items:

- Which issues have been highlighted by the current health crisis concerning the resilience of coastal and maritime tourism?
- What is the impact of coastal and maritime tourism on the economy of tourism destinations? (issues of economic sustainability)
- What is the impact of coastal and maritime tourism on local communities and the natural and built environment of destinations? (issues of social and environmental sustainability)
- What are your views concerning the measurement of the sustainable development of coastal and maritime tourism? (barriers, benefits, data gaps)
- What initiatives have been developed by your institution to monitor the sustainable development of coastal and maritime tourism?

List of Key Informants		
Type	Key Informants	Code
Med Stakeholders	Cruise Lines International Association (CLIA), East Mediterranean Office	KI01
	Global Sustainable Tourism Council	KI02
	Union for the Mediterranean	KI03
	Intermediterranean Commission	KI04
	EUSAIR, Ministry of Tourism and Sports of Croatia	KI05
	Hellenic Ministry of Maritime Affairs and Insular Policy	KI06
	Greenpeace Greece and Greek Tourism Confederation (SETE)	KI07
	Hellenic Chamber of Shipping	KI08
national scale	Association of Cruise Ship Owners and Maritime Agencies	KI09
	Association of Passenger Shipping Businesses	KI10
	Hellenic Ports Association	KI11
	Greek Marinas Association	KI12
	Greek Yachting Association	KI13
	Institute of SETE, the Greek Tourism Confederation (INSETTE)	KI14
	Blue Lab-Business Innovation Center for Blue Growth of Piraeus	KI15
	Hellenic Chamber of Hotels	KI16
local scale (Corfu)	Corfu Municipality	KI17
	Corfu Port Authority S.A.	KI18
	Corfu Hotels Association	KI19
	Association of Tourist Accommodation Owners	KI20
	Association of Daily-tour Cruise Ships of Corfu	KI21

	Association of Corfu Travel Agents	KI22
	Corfu Trade Association	KI23
	Society for the Protection of Natura Areas in South Corfu	KI24
	Corfu Club of High-Speed Boats	KI25

1. Introduction

Coastal and maritime tourism have been for decades catalysts for economic growth in the Mediterranean region, as early as the late 50s, when organized tourist flows from the affluent post-war countries of North Europe and North America towards the Mediterranean shores start to develop (Marson 2011: 3, Holloway et al. 2009: 45, Bardolet and Sheldon 2008: 903-904, Bramwell 2004: 1.). According to data from the European Commission, in 2018 more than 2 million employees worked in coastal tourism in the Mediterranean countries of the EU.

Therefore, tourism can become a powerful tool for economic growth and for protecting the natural and built environment as well as the cultural heritage of those destinations. Moreover, the literature refers to the so-called democratization of tourism: although in the past tourism was a privilege of the elites, the so-called mass tourism has allowed a constantly increasing number of people to travel (Marson 2011: 8).

In this respect, the European Commission is promoting coastal and maritime tourism through the Blue Growth Strategy as a tool for smart, sustainable, and inclusive growth in Europe.

Nevertheless, unplanned tourism development and the rapid growth of coastal and maritime tourism have negative environmental and social impacts, due to the concentration of large numbers of tourists in limited space and time (use of public infrastructure, congestion, depletion of natural resources), which has led to the so-called “overtourism” (OECD 2020, Peeters et al. 2018). Overtourism is not only about the carrying capacity of the destination. It is also about the amount of tourism that could be tolerated by the local community. Governance issues are raised and the need to expand the governance system and ensure the stronger engagement of stakeholders in planning sustainable tourism development is highlighted (Waligo et al. 2013).

Even more emphasis had been put on these issues in the context of the pandemic. The impact of the crisis is more intense in the islands and coastal areas, where the contribution of tourism to the local economy is bigger (SEARICA 2020).

At international fora the pandemic crisis is seen as an opportunity to rethink the tourism ecosystem: the pandemic calls for a paradigm shift away from policies that emphasize tourism growth and that assess positively the increase of tourism flows, and towards policies that support the vision of sustainable tourism growth with smaller tourism flows, lower emissions, effective resource management, more participatory governance models that support evidence based decision making for the development, in the framework of the European Green Deal and the international obligations of the countries for climate change adaptation.

Nevertheless, the overview of the international debate showed that there is a lack of systematic measuring and monitoring of the environmental, social, and economic impacts of coastal and maritime tourism. A previous consultation in the framework of the PANORAMED program, showed that the stakeholders have identified the lack of statistical data as an obstacle for the competitiveness of coastal and maritime tourism in Greece. Therefore, it is necessary to develop a coherent methodological framework, according to the policy framework for the Sustainable Development Goals, to strengthen evidence-based policy making in this subject.

Maritime tourism in Greece

With thousands of islands and islets and more than 16.000 km of coastline of unique landscape and cultural resources, a favorable climate and clear waters, Greece is one of the

most sought-after sailing and cruise destinations in the world (Dianeosis, 2017:15-16). The contribution of yachting and cruise to the Greek economy in terms of employment and income for the islands and the coastal regions is considerable, nevertheless, there are still wide margins of improvement. Both sectors can become major drivers of further economic development for the local communities and the Greek economy (Manologlou, 2017:5).

Yachting in Greece has been a popular tourist activity for many decades among both local and foreign tourists (Diakomichalis, 2008:872). Greece has an extensive network of 22 organized marinas for motorboats, sailboats, and catamarans, with a total of 8.924 berthing places. Twelve of those marinas have been awarded the Blue Flag quality eco-label. The total number of berthing places in marinas, tourist ports and tourist vessel shelters is around 23.500. The biggest marina is in Gouvia, in the island of Corfu with 1.235 berthing places for mooring vessels over 80 meters and the second biggest is the marina in Alimos (Athens), with 1.080 berthing places for mooring vessels that can exceed 40 meters in length (GBR Consulting, 2018: 22). Approximately 3.500 vessels are available for chartering between the months of April and October (the so-called yachting season). The estimated revenue from yacht chartering in Greece was, in 2013, 158 million euros and the total revenue by the sale of yachts and related equipment as well as the costs of ownership and chartering can reach 800 million euros (GBR Consulting, 2018: 25-26).

Yachting also has important multiplier effects in the local coastal and island economies due to the fact it is addressed to a clientele of a high-income level and high spending power (INSETE, 2016:58). With regards to the contribution of yachting to employment, the number of persons employed in the sector (chartering services, crew members and other supporting employees in the local economies) is approximately 20.150 (GBR Consulting, 2018:22-27). Although the existing network of marinas and harbors is quite extensive, the quality of the services provided in many marinas is not always adequate. This last decade the Greek state has put considerable effort in upgrading existing marinas and harbors for the secure mooring and docking of ships as well as in the construction of new, technologically advanced marinas with reduced environmental impact (INSETE, 2016:6).

The cruise sector constitutes an important priority for the Greek tourism industry. In the last decades the pressing need to accommodate the increased volume of ships and passengers, the ever-increasing size of modern cruise ships and the concerns for the environmental and economic impacts on the local communities have created new challenges. Greece has currently a total of 43 cruise ports, with 8 of those (in Piraeus, Santorini, Corfu, Mykonos, Katakolo, Rhodes, Heraklion, Chania) receiving more than 100.000 cruise visitors every year (Dianeosis, 2017:18 and 37). According to the data from the Hellenic Ports Association, the period from 2014 onwards the number of total cruise ships and cruise passengers arriving in greek cruise ports fluctuated considerably with a downward tendency (except for the year 2016). In 2019, before the COVID-19 pandemic, we saw the first signs of an upward trend in the number of cruise arrivals and in the number of cruise passengers, with the number of cruise ships arriving in 25 Greek cruise ports increasing to 3.899 from 3.410 in 2018 (a 14,34% increase) and the number of cruise passengers rising to 5.537.500 in 2019 from 4.788.642 in 2018 (a 15,64% increase) (Association of Greek Ports, 2019). At the same time, with estimates from the National Bank of Greece pointing to a 14,3% increase in revenue in 2019 compared

to 2018 and with total cruise revenue amounting to 556 million euros in 2019, a new, positive momentum is emerging (Bank of Greece, 2019).

Unfortunately, 2020 was a difficult year for both the yachting and especially the cruise industry. With cruise ships considered hotbeds for transmission, tourists were reluctant to embark on cruise trips. To restore confidence in the cruise and yachting industry the Greek government introduced protocols to protect passengers, crews, and the local communities. According to data provided by the Association of Greek Ports (EAIME) only 202 cruise ships arrived in Greek cruise ports with a total of 64.356 cruise passengers disembarking (Association of Greek Ports, 2020).

One additional challenge is the fact that Greece still operates in a large extent as a transit destination and has not managed to turn into a home-porting destination, thus securing additional revenue connected with home-porting activities (Dianeosis, 2017:16-17).

2. Lessons learned from Covid 19

2.1. Vulnerabilities

Covid-19 has exposed the **vulnerabilities** of the tourism ecosystem and has escalated challenges that were already visible on tourism before. It has also limited the timeframe available to cope with lasting deficiencies of the Greek tourism product, mainly because of the financial repercussions of the crisis.

Overtourism

Stakeholders at all levels agreed that tourism massification is an issue for Mediterranean destinations. It is hard for destinations to manage such big quantities of people coming in and the flows are not spread evenly across the territory [KI05]. Large volumes of tourism flows entail issues of social and environmental sustainability. Unlike carrying capacity, **overtourism has to do with the way local communities and other visitors tolerate tourists. Even a small number of visitors may cause annoyance to locals.** Large tourism flows also entail a need to manage energy and water consumption and transportation.

However, several stakeholders have stressed that limiting the number of arrivals should be the last resort [KI01, KI02]. Overtourism is a lack of proper management. The biggest challenge is not to return to the previous situation, to what we had before, because it was unsustainable [KI05, KI16]. Stakeholders stress that we need to recover with new practices that will make the sector more resilient in the future [KI04] and that are in line with sustainable development goals [KI16].

Seasonality

This is a problem endemic to coastal and maritime tourism and accrues overtourism [KI08, KI04]. However, the Mediterranean climate allows the extension of the tourism season [KI04]. It is important both for economic and social sustainability, for destinations, residents, and visitors alike, to:

- span the tourism season and aim to increase the number of visitors over the whole year [KI08].

- increase the number of islands and coastal destinations who provide tourism services [KI08]. If we take yachting as an example, more than 200 islands accept yachting tourists, but we must spread them out so that we do not damage the sites. We need to increase the destinations because the whole point of the cruise is to visit many destinations: “Since you cannot extend the day, we need new destinations” [KI08].
- cruises can also help deal with the issue of seasonality. For example, do a New Year’s Eve Cruise in Greece. If we didn’t have the lockdown, we would have cruises like that in Greece for the first time and there is a huge home-porting interest for Greece [KI01].

The fragmented nature of the sector

The pandemic emphasized the fact that tourism is a variety of sectors. Tourism offer entails the cooperation of a wide array of businesses in different branches that are mostly micro and SMEs. Small businesses have been hit hard by the crisis as they lost considerable revenue and were the least prepared to cope with the pandemic. Due to this, integrated policies are required which are often a challenge for small countries like Croatia and Greece [KI05, KI13].

Environmental impact on aviation

The pandemic has shown that coastal destinations largely depend on international tourism. A long-term risk for global tourism is consumers’ rising concern about environmental change and the impact of aviation [KI02]. Before the pandemic the “**flight-shame movement**” began at Nordic countries and was moving down to Germany and Netherlands and spreading to other developed countries. To counter this, destinations need to put emphasis on making everything on water and the land greener because this will be the counter to aviation and help tourists feel good for the overall experience [KI02].

Dependence on international tourism

The pandemic has shown the economic importance of tourism for many countries and regions. In Croatia 25% of GDP comes from tourism and in some communities 25% of jobs depends on tourism [KI05]. We are highly depended on international tourism. The economic impact for many families in coastal destinations was huge because even if they had other activities, like fishing or selling food, these were related to tourism and the hospitality sector.

2.2. Impact on maritime tourism

Regarding the impact of COVID 19 on maritime tourism, stakeholders stated that the pandemic came after a series of bad years because of the economic crisis.

Ferry boats could only carry 60% capacity in passengers. Stakeholders expected that in 2021 revenue would remain at low levels, because even there is a rise in the number of passengers, this would be counterbalanced by the increase in the cost of fuels [KI10]. Due to the previous years of bad market and loss making, stakeholders feel that they will be unable to cope with the challenges that lie ahead:

- the 2030 EU target to cut emissions by at least 55% compared to 1990 levels, may be inhibited. They expressed their fear that maritime tourism may not be able to make the necessary investments to meet the requirements of the 2030 target [KI10].
- There is a need to renew the fleet, as 40% of the vessels will be over 40 years old by 2030 [KI08, KI10].

The **cruise industry** was hit very hard [KI01, KI09]: from mid-March until mid-July 2020 there were no sailings around the world. At the national level, arrivals at the Greek ports have fallen by 93% in 2020 [KI10]. Daily cruises were also hit hard [KI18].

In the short term, countries were not prepared to deal with similar issues, particularly when many passengers in big vessels was concerned [KI09]. Sometimes the crew was forced to stay on board for a long time and ports did not provide shelter to cruises that are normally sought after for the income they provide. This has led to the cruise industry being targeted. In the long term, destinations and companies have been deprived from a considerable source of income [KI09]. Shore activities were greatly impacted because at the first phase the passengers were not allowed to go out or could only go to specific places to protect the health of the local communities, the crew, and the passengers. Moreover, work to develop the necessary infrastructure to improve cruising was halted [KI09].

However, national stakeholders stressed that Greece remains an attractive destination for cruises [KI10]. The resumption of cruising does not only depend on cruise lines, but requires coordination among many different parties: governments, because those are the ones who adopt the national protocols and the local communities who implement the protocols. However, there are local communities that cannot adjust to the new rules or need more time (especially islands which may not be able to do all the tests [KI01].

Marinas were less affected because vessels remained anchored during the pandemic. However, there has been a 70% decrease in revenue coming from vessels passing by that were not permitted to moor [KI12]. Passengers could not approach the land and therefore revenue from the commercial use of the marinas decreased as well. In the long term, economic sustainability is jeopardized as costs remain stable whereas there is a considerable loss of revenue [KI12].

The pandemic has also changed **consumer preferences**. We may not expect another pandemic for 100 years, but we can expect smaller cases of regional pandemics and we do expect international travelers to be more sensitive to the issues of safety and hygiene [KI02]. These issues should be addressed on embarkation points and aboard.

2.3. Opportunities

However, opportunities have emerged from the crisis.

Stakeholders expect that funding from the **Recovery and Resilience Facility (RRF)** will contribute to upgrading the Greek tourism product and invest in the green transition.

The pandemic has enhanced tourism forms consistent with environmental sustainability. National stakeholders have put forward the importance of **yachting** as a promising and sustainable tourism product in the post-covid era, a win-win strategy both for visitors and destinations [KI13]. Large yachts offer privacy and, in this sense, have proven a safe mode of vacation during the pandemic [KI13, KI17]. Yachting attracts high-income visitors that spend within the local economy. They also tend to visit less popular destinations and therefore contribute greatly to the sustainable management of tourism flows. Stakeholders stated that over the last years the industry has adopted environmental good practices (such as solid waste management systems) to limit its environmental footprint. Yachting has a relatively slow

impact on coastal destinations, and it is a way to deal with the fact that too many people arrive to the islands at the same time [KI08].

However, yachting depends on international air transport and requires proper airport infrastructure to realize its full potential [KI13]. Our main competitors are Croatia and France [KI17]. Moreover, yachting won't cope with a continuing crisis and stakeholders point out that, unlike other tourism branches, yachting didn't benefit from state subsidies, not even from reducing the cost of mooring in the marinas [KI19]. We must consider that yachting is costly (highly remunerated crews, high cost for maintenance and mooring) [KI19].

According to maritime tourism Greek stakeholders, **marinas** also present a considerable advantage for the sustainable development of tourism destinations. Marinas offer a clean, safe, and high-quality coastal environment for locals and visitors alike.

Stakeholders have also put forward several **positive outcomes**:

- The decrease of movement was good for the environment [KI04]
- The pandemic has obliged countries to face the problems. Stakeholders understand the need to help the sector recover in a structured way and promote long term policies [KI03].

2.4. Policy recommendations

Resilience depends heavily on variety and **diversification**, on keeping our alternatives open. To achieve this the sector needs to diversify the source markets and the tourism offer. For example, a way to avoid too much dependence on international tourism impact is **to refocus on internal tourism** [KI03, KI04]. This could enhance the resilience of the sector to future shocks. Stakeholders acknowledge the importance of internal tourism to ferry boats, accommodation and food and beverage. They put forward the need to provide accurate numbers of the passengers [KI10].

There is also a need **to disperse tourism flows** more evenly between coastal areas and the mainland and diversify the tourism product so that coastal tourism becomes less dependent on the "sea and sun" tourism model [KI03]. This would also reduce seasonality.

The sector also needs to adopt **an inclusive and place-based governance approach**. Stakeholders have put forward the need to:

- Enhance the institutional capital and build a bridge between what is being decided at a political/high level and the real needs of the territories [KI03]. There is a need for vertical policies that link policies at the central, regional, and local level [KI05].
- Invest in the awareness and the governance of the local communities. The local communities could collaborate in taking care of the territories [KI03]. The tourism industry and the local communities "need to reconcile" [KI07].
- Invest on human capital and enhance new skills (especially digital and soft skills). There is competent human capital in local communities that need to be empowered to come up with smart and innovative solutions, which will make communities more resilient [KI05].

- Establish a single coordination center at the national level to cope with emergencies and crisis management in the cruise industry [KI09]. This center may also develop crisis management plans for ports and aboard the ships.

Stakeholders at the national and local level also stressed the need **to improve port and marina infrastructure** [KI10, KI12]. Projects to upgrade infrastructure must be planned and finish on schedule, otherwise they encumber the movement of ships [KI10]. It is necessary to create **a network of marinas within 30 to 50 miles distance** offering quality services, so that vessels can safely move between ports [KI12].

3. Coastal and maritime tourism: impact on sustainability

3.1. Economic sustainability

Mediterranean stakeholders agree that maritime and coastal tourism are important drivers for growth for the local and national economy. The direct contribution of maritime and coastal tourism to the Greek economy is estimated at 1.4-1.5% of the Greek GDP. The multiplier effects on the local economies are also considerable [KI17].

Cruise ships for example have a positive impact on the local economies. Revenue is generated by:

- the crews and passengers' shore expenditure (ex. excursions),
- expenses for supplies (ex. food, fuel, water supplies)

Several stakeholders put forward the need **to create synergies between tourism and the local agrifood sector**, comprising agricultural production, fisheries and food manufacturing (like small breweries, wineries, local cheese dairies) [KI04, KI14, KI23, KI24]. This would enhance the diffusion of tourism expenditure to more and new economic stakeholders from the mainland [KI22].

3.2. Environmental sustainability

A carbon free fleet

Stakeholders stressed the need to create a zero-ferry carbon print for tomorrow, so that our 160 ferry boats and 260 taxis-boats are all carbon free [KI10]. However, these priorities have been put aside by the pandemic and the 2030 EU target to cut emissions by at least 55% compared to 1990 levels, may be inhibited. Consultation has revealed the vulnerability of maritime tourism, especially cruises, which have been hit hard by COVID-19. Stakeholders acknowledged that the industry has suffered considerable economic losses caused by the pandemic after a series of difficult years, when revenues were unstable due to the economic crisis. They expressed their fear that maritime tourism may not be able to make the necessary investments to meet the requirements of the 2030 target.

Waste treatment

More specifically waste caused by ships can damage fragile maritime and coastal environments. It is important to introduce sewage treatment systems and vacuum pumps to protect the maritime ecosystems [KI17].

Travellers' environmental concerns

Before the pandemic the “flight-shame movement” began at Nordic countries, spreading to other developed countries [KI02]. That is a long-term risk for global tourism because more and more people are concerned about environmental change and the impact of aviation.

Stakeholders put a word of caution for wind turbines [KI14]. They might damage the scenery of the islands as they may be up to 250 meters high and will therefore be visible from the coast.

3.3. Social sustainability

Displacement of residents

This issue is closely related to overtourism, but also to gentrification that may eventually take place due to the rising cost of living in tourist destinations. A key informant recalled the case of Barcelona, where “the local population doesn’t live in the center because it has been invaded by tourism” [KI04].

Governance

Local stakeholders stress the fact that host communities remain to a large extent excluded from the process of strategic planning. Consequently, their opinions and input are not taken into consideration from an early stage [KI18, KI21].

In this framework, the pandemic, and the need to restart tourism in line with the principles of sustainability are considered by stakeholders at all spatial levels (national, local, and Mediterranean) as an opportunity to “work in a more integrated way” [KI04] and adopt a holistic, territorial approach [KI03]. This includes working with stakeholders from other government bodies and other economic sectors, like energy and transport (horizontal coordination) as well as working in a coordinated manner with stakeholders across spatial levels (vertical coordination). Regarding social sustainability, it is also about involving the local community in planning and implementation. For several stakeholders, cooperation is the key word for the future.

3.4. The need to measure and monitor

Participants at all levels agreed on the need to produce data driven policies. Stakeholders acknowledged the lack of data, even for basic indicators concerning the number of arrivals at coastal destinations, the profile of visitors interested in different forms of maritime tourism, like yachting, sailing, and cruising.

Considering yachting for example, we know the number of professional vessels, but we have no information regarding the evolution of the fleet or data concerning the duration of trips, tourist expenditure and profile [KI13]. The Ministry of Maritime Affairs and Insular Policy holds a register for professional vessels, but data need to be further analyzed [KI13].

There is a shared need among all maritime tourism stakeholders to systemize, aggregate, analyze and diffuse data. Sometimes data are collected with considerable delay [KI12]. **Data**

relevant to the industry include that need to be collected, analyzed, and diffused for strategic planning include:

- data concerning the **fleet** and **chartering**
- **passengers**: number and profile per branch. It is also imperative to measure cruise passengers' arrivals at small Aegean islands to manage and disperse tourism flows [KI11].
- **ownership** of the fleet
- **human resources**: number and profile of seamen employed in professional tourism vessels
- data concerning the **shipping industry** (building and maintenance) to fully measure the positive impact of maritime tourism on the economy

Stakeholders suggest that a proper methodological framework must address the following:

- Data collection and analysis needs to be periodical and **relevant both to place and to thematic forms of tourism**. Indicators must be place-based and keep in mind issues related to insularity [KI14]. Accurate measuring will clarify the scope of indicators and the spatial areas and branches affected by policy measures [KI14].
- To define the geographical scope of coastal tourism, stakeholders propose to adopt a **market-wise approach**: not to measure the distance from the coast but to ask who the clients that coastal and maritime tourism concerns are [KI14].

Stakeholders agreed **the Research and Monitoring Centre can provide a solid base for data aggregation and analysis** and expressed their will to support the project and cooperate with the Ministry to collect the data [KI09, KI11, KI13, KI14, KI16].

Stakeholders feel that:

- The Research Centre must provide the industry with the necessary data for strategic planning. For example, whether to build large cruise ships or not [KI09] or where to invest to expand sea transport between the islands [KI10] or to build new marinas [KI12].
- It will also help the industry and government alike to pinpoint alarming trends and decide mid- and long-term targets at the national and local level: what we wish to avoid and where we want to go [KI16].
- Stakeholders in Corfu stressed the importance of data at the local level [KI21, KI22]. The Research Centre will provide valuable information for evidence-based strategic planning [KI19].
- National stakeholders stressed the importance of cooperation, especially between the Ministry of Tourism and the Ministry of Maritime Affairs to collect and analyze data [KI10, KI13].

4. Case study: the island of Corfu

Stakeholders acknowledged the importance of coordination from the central government and were glad the ministry took the initiative to help them solve issues they usually try to cope with on their own.

4.1. Impact on the local economy

The dispersion of tourism flows is considered important for many reasons. First, overtourism has become a burden both for the island of Corfu and the island of Paxoi. There are places in the city of Corfu that are overwhelmed with tourists at certain hours of the day. For example, when 4 cruises come to the island at the same time and about 15,000 to 20,000 thousand passengers are on board. This causes heavy traffic and congestion. The island of Paxoi is facing similar issues. From 1979 to 1990 6-7 daily-tour cruise ships anchored every day. There was a point when the port could not accept all vessels (daily cruises and yachts). Overtourism diminishes the tourism product, ruins the brand, and damages the environment [KI22].

Moreover, discussion revealed discrepancies between coastal areas and the city of Corfu on the one hand and the mainland on the other. Local produce is of high quality [KI22, KI23, KI25] and stakeholders propose that they become part of breakfast offered by hotels [KI24]. Many food supplies come from the mainland which is a way to distribute income more evenly. Daily excursions by cruises contribute to the diffusion of tourism expenditure to the mainland. Daily cruises contribute to the diffusion to nearby smaller islands like Paxoi [KI25]. However, businesses in the mainland are said to follow a different model and lifestyle [KI25].

4.2. Challenges

Yachting

Like the impact at the national scale, in Corfu cruises have been hit hard whereas yachting has proved to be resilient [KI18]. Stakeholders acknowledge the contribution of yachting to the national and the local economy. The direct contribution of marinas and yachting ranges from 1.4 to 2.5% of the GDP, whereas their indirect contribution may be 4 to 5 times greater [KI17].

However, there several problems that need to be dealt with. First, there is a shortage of licensed, organized berths. In Greece there are about 23,000 private and professional vessels and only 12,000 berths. In Corfu, the marina holds 1,400 berths. Recently a second smaller marina of 80 berths at Spilia was tendered [KI17, KI18].

Licensed berths are lacking because in the past we didn't build enough marinas and because we urgently need to make use of existing ports and marinas that are not currently in operation [KI17, KI18]. Bureaucracy is an important barrier, as it may take two years to license an existing small port and we usually don't know the legal owner of the port [KI17]. Unused port infrastructure in Corfu (35 ports and marinas) is currently under the jurisdiction of the Corfu Port Authority S.A. [KI18]. The Authority cannot easily cope with such a workload and has therefore adopted a step-by-step approach to gradually make use of berths in smaller ports.

In the long term we need to invest in constructing new ports and marinas. However, this may be a ten-year project, so in the short term it is important to make the most of old infrastructure that we usually consider demolishing [KI17].

Port infrastructure is a prerequisite if we are to enhance yachting and develop new destinations. Upscale tourists cannot visit local communities and spend in the local economy if they cannot approach the beach. Ports need to be built in short distance from each other, because sailing boats are slow and travelling long distances is tiring for passengers [KI21]. Heavy licensing procedures for the use of ports are also considered a drawback.

Cruises

Stakeholders also acknowledge the importance of cruises to the local economy. Even if research shows that the average expenditure of cruise passengers on shore is 40 to 50 euros, stakeholders stress that cruises bring life to the port of Corfu and that many businesses depend on cruises for a living [KI21].

Daily-tour cruise ships

Local stakeholders made special reference to daily-tour cruises. Daily-tour cruises also play an important role in maritime tourism since 1965. At present, there are about 750 vessels in Greece that employ 3,500 Greek seamen and all are under the Greek flag. During the pandemic, the touristic period for the daily-tour cruises as well as their capacity have been reduced to half, a situation that has jeopardized their economic sustainability [KI21]. The representative of the local union asked for the daily-tour cruises to have access to marinas on a lower cost so that they can expand their business to other parts of the island [KI21].

General shortage of adequate infrastructure

Stakeholders pointed to the lack of proper infrastructure in general (road transport network, poor water supplies). Lack of basic infrastructure (water and energy supplies, vacuum pumps) in ports to support environmental sustainability [KI19].

Liquidity issues

Several tourism businesses, particularly accommodation and stores in touristic areas, face liquidity issues due to the pandemic that need to be dealt with in the short term [KI19]. Local trade: The pandemic has changed considerably both the quantity and the profile of visitors. Large tourism flows have been reduced and this is not welcome by stakeholders [KI23].

4.3. Opportunities:

Local stakeholders convene that yachting is considered a safe mode of vacation, as it ensures privacy [KI01, KI13]. The only risk it involves is air transport. There is already strong demand for new vessels. Greece's main competitors are Croatia and South France.

Stakeholders also referred to digital nomads: they have become a strong trend amid the pandemic. Distance working will bring visitors who will choose short term rentals (accommodation or yachts) to spend their time on the island while working. Digital nomads will boost the local economy as they will be part of the local community [KI23]. This enhances the need to speed up the digital transformation of tourism businesses and provide the necessary infrastructure (5G, Wifi).

4.4. Policy recommendations

- Stakeholders stressed the need for lasting and open cooperation networks, so that problems may be solved swiftly and avoid lingering. Stakeholder networks must also ensure that information is properly diffused, and that solutions and proposals put on the table are available to all [KI17, KI18, KI21].
- Medium- and long-term planning: to monitor trends in maritime tourism to be able to schedule in time projects related to port and marinas infrastructure [KI18]. It is urgent to provide more marinas and berths [KI19, KI21].

- Stakeholders stress the importance of data at the local level [KI21, KI22]. The Research Centre will provide valuable information for evidence-based strategic planning [KI19].
- Quays should belong to the municipalities. This will make their maintenance easier and would provide extra income to the municipalities who can then rent them to businesses [KI20, KI21]. At present, many quays are not proper for use and the ports must deny access to vessels who need to moor [KI21]. Stakeholders stressed the need to modernize old piers [KI19]. Stakeholders acknowledge that this issue falls under the jurisdiction of the Ministry of Maritime Affairs and Insular Policy but have asked for the Ministry of Tourism to intervene.
- Municipalities need to attend to the quality of public spaces (for example issues of cleanliness, clean beaches [KI19]). We must also keep in mind that public spaces in Greece and in Corfu have been built for smaller crowds [KI23].
- Preserving and promoting cultural authenticity: Local stakeholders also put forward the need to highlight the natural and cultural resources of each destination. This will raise awareness of the importance of local tangible and intangible heritage as an asset for the tourism product developed and offered by Med destinations [KI24].
- To enhance ecotourism on the island, e.g. bird-watching and walking in the lagoon and the salt marshes of the island [KI24].
- B2G: It is necessary to simplify and speed up all bureaucratic procedures involved in the process of developing and licensing new marinas/ports/vessel shelters [KI17, KI18].

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