



HELLENIC REPUBLIC
Ministry of Tourism

2021

Roundtable with Greek stakeholders: Measuring and monitoring coastal and maritime tourism

MINUTES OF THE ROUNDTABLE

66TTH MEETING OF THE UNWTO COMMISSION FOR
EUROPE, SIDE EVENT ON COASTAL AND MARITIME
TOURISM – JUNE 4TH 2021

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

Την Παρασκευή 4 Ιουνίου έλαβε χώρα στην Αθήνα, στο περιθώριο της 66ης Συνόδου της Περιφερειακής Επιτροπής για την Ευρώπη του Παγκόσμιου Οργανισμού Τουρισμού, συζήτηση στρογγυλής τράπεζας μεταξύ των εθνικών εταίρων του παράκτιου και θαλάσσιου τουρισμού της χώρας μας. Η συζήτηση αποτέλεσε μία εξαιρετική ευκαιρία για τη γόνιμη διερεύνηση των ευκαιριών και των προκλήσεων που αναδεικνύονται αναφορικά με την εν λόγω θεματική μορφή τουρισμού μέσα από την εποικοδομητική ανταλλαγή θέσεων και προβληματισμών.

Στη συζήτηση συμμετείχαν οι:

- Αλέξανδρος Βασιλικός, Πρόεδρος του Ξενοδοχειακού Επιμελητηρίου Ελλάδος (ΞΕΕ)
 - Γεώργιος Βερνίκος, Πρόεδρος της Vernikos Yachts και ιδρυτικό μέλος της Greenpeace Greece
 - Άρης Ίκκος, Επιστημονικός Διευθυντής του Ινστιτούτου ΣΕΤΕ
 - Άγγελος Καρακώστας, Πρόεδρος της Ένωσης Λιμένων Ελλάδος (ΕΛΙΜΕ)
 - Σταύρος Κατσικάδης, Πρόεδρος της Ένωσης Μαρίνων Ελλάδος
 - Μιχαήλ Σκουλικίδης, Πρόεδρος του Ελληνικού Συνδέσμου Θαλάσσιου Τουρισμού
 - Ανδρέας Στυλιανόπουλος, CEO της Navigator Travel and Tourist Services Ltd
- Η συζήτηση διεξήχθη σε δύο γύρους και στράφηκε γύρω από τα ακόλουθα ερωτήματα:

1. Ποια ζητήματα ανέδειξε η παρούσα κρίση της πανδημίας για την ανθεκτικότητα του θαλάσσιου και παράκτιου τουρισμού;
2. Πώς εκτιμάτε την συμβολή του θαλάσσιου και παράκτιου τουρισμού στην οικονομία, το περιβάλλον και την τοπική κοινωνία των παράκτιων και νησιωτικών προορισμών; Η οπτική και οι προτάσεις του κλάδου.

Ακολουθεί η σύνοψη των βασικών σημείων στα ελληνικά, καθώς και τα αναλυτικά πρακτικά της συζήτησης.

Παρατίθεται ως:

Ministry of Tourism of Greece (2021). *Minutes of the Roundtable with Greek stakeholders on Measuring and monitoring coastal and maritime tourism*. 66th Meeting of the UNWTO Commission for Europe, Side event on coastal and maritime tourism, 4th June 2021. General Directorate for Tourism Policy, Directorate for Research.

On Friday the 4th of June 2021, the Roundtable with Greek Stakeholders of Maritime and Coastal Tourism was held on the margins of the 66th meeting of the UNWTO Regional Commission for Europe. The round table provided an excellent opportunity for a fruitful discussion on the opportunities and challenges that have arisen during the pandemic.

The panel consisted of:

- Alexandros Vasilikos, President of the Hellenic Chamber of Hotels*
- George Vernikos, President of Vernikos Yachts and Founding Member of Greenpeace Greece*
- Aris Ikkos, Scientific Director of the Institute of the Greek Tourism Confederation*
- Anghelos Karakostas, President of the Hellenic Ports Association*
- Stavros Katsikadis, President of the Greek Marinas Association*
- Michael Skoulikidis, President of the Greek Yachting Association*
- Andreas Stylianopoulos, CEO, Navigator Travel and Tourist Services Ltd.*

Discussion evolved in two rounds on the following questions:

- 1. Which issues have been highlighted by the pandemic concerning the sustainability of coastal and maritime tourism?*
- 2. What is the impact of coastal and maritime tourism on the economic, environmental, and social sustainability of tourism destinations?*

In the following you may find a brief overview of the key findings in Greek and the minutes of the round table.

Cite as:

Ministry of Tourism of Greece (2021). *Minutes of the Roundtable with Greek stakeholders on Measuring and monitoring coastal and maritime tourism*. 66th Meeting of the UNWTO Commission for Europe, Side event on coastal and maritime tourism, 4th June 2021. General Directorate for Tourism Policy, Directorate for Research

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Σύνοψη

1. Πρώτος Γύρος:

Ποια ζητήματα ανέδειξε η παρούσα κρίση της πανδημίας για την ανθεκτικότητα του θαλάσσιου και παράκτιου τουρισμού;

Κατά τον πρώτο γύρο της συζήτησης οι συμμετέχοντες ανέδειξαν μία σειρά από αδυναμίες και ευάλωτα σημεία του τομέα, αλλά και από σημαντικές ευκαιρίες που εγείρονται για τον τουρισμό μετά την πανδημία.

1.1 Αδυναμίες – Προκλήσεις

Οι συμμετέχοντες αναφέρθηκαν σε μία σειρά από χρόνιες, διαρθρωτικές αδυναμίες αλλά και από εξωγενείς και ενδογενείς προκλήσεις τις οποίες ο τουριστικός τομέας αναμένεται να αντιμετωπίσει στο εγγύς μέλλον. Πιο συγκεκριμένα:

- Η μεγάλη εξάρτηση πολλών προορισμών από τον τουρισμό, ως βασική οικονομική δραστηριότητα, αλλά και ο ιδιαίτερα ευάλωτος χαρακτήρας ορισμένων μορφών θαλάσσιου και παράκτιου τουρισμού, ήτοι της κρουαζιέρας.
- Η εργασιακή ανασφάλεια που προκάλεσε η πανδημία έχει ως αποτέλεσμα πολυάριθμοι εργαζόμενοι στον τομέα του τουρισμού να επιλέγουν να στραφούν σε άλλα επαγγέλματα, εντείνοντας το υπάρχον πρόβλημα της έλλειψης εργατικού δυναμικού.
Η επισήμανση αυτή επιβεβαιώνει τα ευρήματα της διαβούλευσης που είχε διεξάγει το Τμήμα Μελετών και Τεκμηρίωσης για τις ψηφιακές δεξιότητες των εργαζομένων στον τουρισμό στη χώρα μας αλλά και τα συμπεράσματα μελέτης του Cedefop (2020) για την απασχόληση στον τουρισμό, σύμφωνα με τις οποίες λόγω της πανδημίας και της παρατεταμένης ελλιπούς λειτουργίας των τουριστικών επιχειρήσεων, ο τουρισμός έχει απωλέσει ειδικευμένο εργατικό δυναμικό.
- Ο ανταγωνισμός από γειτονικές χώρες στον τομέα του yachting αναμένεται να ενταθεί. Η χώρα μας παρουσιάζει μία σειρά από σημαντικές διαρθρωτικές αδυναμίες (υψηλός συντελεστής ΦΠΑ, δυσμενές φορολογικό καθεστώς, υψηλά επιχειρησιακά κόστη) οι οποίες επιτρέπουν στις γειτονικές ανταγωνιστικές χώρες να προσφέρουν τις υπηρεσίες τους σε χαμηλότερες τιμές και να διαθέτουν μεγαλύτερα περιθώρια κέρδους.
- Το χρονικό πλαίσιο εντός του οποίου θα πρέπει να αντιμετωπιστούν μία σειρά από χρόνιες αδυναμίες του ελληνικού τουρισμού (εποχικότητα, ελλιπής τήρηση των αρχών της βιωσιμότητας, έλλειψη καταρτισμένου εργατικού δυναμικού και το ψηφιακό έλλειμμα) έχει περιοριστεί σημαντικά λόγω των σημαντικών συνεπειών της πανδημίας αλλά και των διαρθρωτικών αλλαγών που αυτή προκάλεσε στο σύνολο της οικονομίας.

1.2. Ευκαιρίες

Σύμφωνα με τους συμμετέχοντες η πανδημία μπορεί να αποτελέσει μία σημαντική ευκαιρία αναβάθμισης του τουριστικού τομέα εν γένει και επανεκκίνησης της ελληνικής οικονομίας. Πιο συγκεκριμένα:

- Τα σημαντικά κονδύλια που θα χορηγηθούν στη χώρα στο πλαίσιο του ευρωπαϊκού σχεδίου ανάκαμψης δύνανται να συμβάλλουν στην αναβάθμιση του τουριστικού προϊόντος και στην υλοποίηση επενδύσεων στρατηγικής σημασίας.
- Μία σειρά από προϋπάρχουσες τάσεις, οι οποίες εντάθηκαν κατά τη διάρκεια της πανδημίας (π.χ. digital nomads), μπορούν να αποτελέσουν σημαντική ευκαιρία για τον εμπλουτισμό του τουριστικού προϊόντος της χώρας, για τη διεύρυνση της τουριστικής περιόδου και για την προσέλκυση νέων τουριστών.
- Η ανθεκτικότητα και η προσαρμοστικότητα στις νέες συνθήκες που επέδειξε το yachting, χάρη στο αίσθημα ασφάλειας που προσφέρει στον επισκέπτη, προκαλεί αισιοδοξία για την περαιτέρω ανάπτυξη της δυναμικής αυτής μορφής θαλάσσιου τουρισμού. Η προσθήκη νέων προορισμών yachting κατά τη διάρκεια της πανδημίας, τάση η οποία αναμένεται να συνεχιστεί, μπορεί να συμβάλει στην καλύτερη διαχείριση των τουριστικών ροών.
- Η αύξηση του αριθμού των εταιριών κρουαζιέρας που, μετά την πανδημία, επιλέγουν τη Μεσόγειο για το home porting (ενώ παλαιότερα επέλεγαν ως σημείο εκκίνησης την Καραϊβική) μπορεί να αποτελέσει εξαιρετική ευκαιρία για τη χώρα μας.
- Παρόλο που οι μαρίνες υπέστησαν σημαντικές απώλειες κατά τη διάρκεια της πανδημίας κατέστη, ταυτόχρονα σαφές πως το επενδυτικό ενδιαφέρον από το εξωτερικό για την αναβάθμιση των υποδομών τους και τη δημιουργία θέσεων ελλειμνισμού είναι έντονο.

2. Δεύτερος Γύρος:

Πώς εκτιμάτε την συμβολή του θαλάσσιου και παράκτιου τουρισμού στην οικονομία, το περιβάλλον και την τοπική κοινωνία των παράκτιων και νησιωτικών προορισμών; Η οπτική και οι προτάσεις του τομέα

Κατά τον δεύτερο γύρο της συζήτησης οι συμμετέχοντες εξέφρασαν τις απόψεις τους σχετικά με τη συμβολή του θαλάσσιου και του παράκτιου τουρισμού στην οικονομία, το περιβάλλον και την τοπική κοινωνία των παράκτιων και νησιωτικών προορισμών και κατέθεσαν μία σειρά από προτάσεις για την περαιτέρω ανάπτυξη του τομέα.

2.1. Συμβολή σε οικονομία, περιβάλλον και τοπική κοινωνία

Η συμβολή του τουρισμού στην οικονομική ανάπτυξη, τη διασφάλιση της περιβαλλοντικής βιωσιμότητας και την κοινωνική ευημερία υπογραμμίστηκε από το σύνολο των συμμετεχόντων στην στρογγυλή τράπεζα. Πιο συγκεκριμένα ανέφεραν πως:

- Ο θαλάσσιος και παράκτιος τουρισμός αποτελεί για πολυάριθμα νησιά και παράκτιους προορισμούς μία σημαντική οικονομική δραστηριότητα και αναπτυξιακή διέξοδο, συμβάλλοντας αποφασιστικά στη δημιουργία θέσεων εργασίας ειδικά για τους νέους.
Επιπλέον, οι συμμετέχοντες τόνισαν ότι ο τουρισμός δεν πρέπει να χαρακτηρίζεται με αρνητικό τρόπο ως μονοκαλλιέργεια, καθώς στην πραγματικότητα αναπτύχθηκε σε περιοχές όπου λόγω των συνθηκών παραγωγής έφθιναν προηγούμενες παραγωγικές δραστηριότητες. Για παράδειγμα, στις μικρές νησιωτικές περιοχές δεν ήταν δυνατή η εκμηχάνιση της παραγωγής και η αγροτική παραγωγή δεν μπορούσε να ανταγωνιστεί τις μεγάλες ποσότητες παραγωγής της ηπειρωτικής χώρας.
- Το yachting προσελκύει επισκέπτες υψηλού εισοδηματικού επιπέδου που δαπανούν σημαντικά ποσά στους προορισμούς που επισκέπτονται. Παράλληλα, έχουν την τάση να επισκέπτονται λιγότερο δημοφιλείς προορισμούς, συμβάλλοντας, με αυτόν τον τρόπο, στην καλύτερη χωρική διαχείριση των τουριστικών ροών.
- Ο κλάδος του yachting υιοθετεί κατά τα τελευταία χρόνια μία σειρά από περιβαλλοντικά βιώσιμες πρακτικές (όπως η χρήση συστημάτων διαχείρισης αποβλήτων και απορριμμάτων) προκειμένου να αμβλύνει το περιβαλλοντικό της αποτύπωμα.
- Οι μαρίνες αποτελούν ένα σημαντικό πλεονέκτημα για τις τοπικές κοινωνίες, δεδομένου ότι προσφέρουν ένα υψηλής ποιότητας, ασφαλές και καθαρό παράκτιο περιβάλλον για τους μόνιμους κατοίκους και τους επισκέπτες.

2.2. Προτάσεις

Οι συμμετέχοντες κατέθεσαν μία σειρά από προτάσεις οι οποίες θα μπορούσαν να συμβάλλουν στην βελτίωση του εν λόγω τουριστικού προϊόντος και στην αντιμετώπιση των χρόνων διαρθρωτικών προβλημάτων του τουρισμού. Οι βασικές προτάσεις που κατατέθηκαν είναι οι ακόλουθες:

- Η προσέλκυση και υλοποίηση επενδύσεων με στόχο την αναβάθμιση των υποδομών των τουριστικών λιμένων και μαρίνων.
- Η εδραίωση της συνεργασίας μεταξύ όλων των ενδιαφερόμενων μερών (stakeholders) ειδικά σε επίπεδο στρατηγικού σχεδιασμού, με ιδιαίτερη έμφαση στη συμμετοχή των τοπικών και περιφερειακών φορέων κατά τη διαδικασία διαμόρφωσης των πολιτικών.
- Η αναβάθμιση των δεξιοτήτων των εργαζομένων στον τομέα του τουρισμού, η προώθηση της καινοτομίας, η αξιοποίηση εργαλείων e-learning καθώς και η ανταλλαγή βέλτιστων πρακτικών.
- Δεδομένου ότι σε μεγάλο βαθμό το πρόβλημα του υπερτουρισμού συνδέεται με την εμφάνιση νέων μορφών τουριστικής διαμονής, είναι αναγκαία η καταγραφή των διατιθέμενων ακινήτων από τις τοπικές αρχές.
- Κρίνεται ως επιτακτική η διαμόρφωση ενός σύγχρονου νομοθετικού πλαισίου τόσο για το yachting όσο και τους λιμένες που να λαμβάνει υπόψιν τις σύγχρονες προκλήσεις.
- Η εναρμόνιση της νομοθεσίας των Μεσογειακών κρατών της ΕΕ προκειμένου να διευκολύνεται η επίσκεψη πολλαπλών προορισμών σε διαφορετικές χώρες.

Measuring and monitoring coastal and maritime tourism: Roundtable with Greek stakeholders

Introduction

On Friday the 4th of June 2021, the Roundtable with Greek Stakeholders of Maritime and Coastal Tourism was held on the margins of the 66th meeting of the UNWTO Regional Commission for Europe. During this high-level meeting the MOU for cooperation between the Ministry of Tourism and the UNWTO was signed, establishing the Research Centre for Coastal and Maritime Tourism in the Med Region. The round table provided an excellent opportunity for the exchange of ideas and for a fruitful discussion on the opportunities and challenges that have arisen during the pandemic.

The panel consisted of the main stakeholders in the maritime and coastal tourism sector:

- George Vernikos, President of Vernikos Yachts and Founding Member of Greenpeace Greece
- Michael Skoulikidis, President of the Greek Yachting Association
- Stavros Katsikadis, President of the Greek Marinas Association
- Andreas Stylianopoulos, CEO, Navigator Travel and Tourist Services Ltd.
- Alexandros Vasilikos, President of the Hellenic Chamber of Hotels
- Anghelos Karakostas, President of the Hellenic Ports Association
- Aris Ikkos, Scientific Director of the Institute of the Greek Tourism Confederation

The roundtable was moderated by Ms Konstantina Tsakopoulou, Deputy Head for Research Studies and Documentation, Ministry of Tourism of Greece.

Participants were invited to comment on the outcomes of the consultation held from April to May 2021 by the Ministry of Tourism, Directorate of Research, with stakeholders at the national level, local stakeholders (with the case study of the island of Corfu) and with stakeholders from the Mediterranean region on the sustainable development of coastal and maritime tourism. Discussion evolved around two main topics:

1. Which issues have been highlighted by the pandemic concerning the sustainability of coastal and maritime tourism? (vulnerabilities - opportunities)
2. What is the impact of coastal and maritime tourism on the economic, environmental, and social sustainability of tourism destinations? (challenges -proposals)

Participants were welcomed by Dr. Stavroula Kefala, Head of the Directorate for Research, Directorate General for Tourism Policy, Ministry of Tourism of Greece, who also presented the closing remarks.

In the first round, participants highlighted several structural vulnerabilities of the coastal and maritime tourism sector such as:

- tourism as a monoculture for many destinations,
- shortage of skilled personnel, and

Roundtable with Greek stakeholders: Measuring and monitoring coastal and maritime tourism

- intense competition from neighboring countries.

Stakeholders stressed the fact that the time frame for resolving these problems has been significantly reduced due to the pandemic. Nevertheless, it was agreed that the pandemic also accelerated the emergence of new tourism products and tendencies that could contribute to counterbalance seasonality and attract new tourists. Stakeholders were optimistic for the future of yachting, a form of maritime tourism that showed resilience during the pandemic.

In the second round, stakeholders provided a comprehensive review of the main contributions of maritime and coastal tourism to the economic, social and environmental sustainability of many destinations (economic growth, job creation, the creation of a safe and clean environment for all citizens in the case of the marinas). Stakeholders outlined a series of proposals that could further contribute to the development of maritime and coastal tourism such as:

- creating a modern legal framework,
- harmonizing the European legal framework concerning yachting,
- upgrading existing infrastructure and creating new,
- upskilling and reskilling the tourism workforce,
- introducing e-learning tools,
- exchanging best practices,
- fostering innovation, and
- involving all stakeholders in the strategic planning process.

Below you may find the contributions of the participants.

Minutes

KONSTANTINA TSAKOPOULOU

This is truly an honor for me to be with you today and I thank each one of you for being here, for participating in our discussion and for supporting all our efforts in the Ministry.

Today we will discuss the issues of resilience and sustainability for coastal and maritime tourism with distinguished representatives and members of the Greek tourism industry.

What brings us together today is our commitment to join our forces and establish a Research and Monitoring Centre for Coastal and Maritime Tourism in the Mediterranean, situated in Greece, with the collaboration of the UNWTO and the University of the Aegean dedicated to measuring the sustainable development of coastal and maritime tourism across the Mediterranean. The Research Centre will become a reference point for the study and protection of our coasts and seas, will support the operational exchange of data across countries and encourage scientific feedback as a basis for policy and strategic planning. In a few hours

With the aim to raise awareness and build consensus on the need to measure and monitor coastal and maritime tourism, the Ministry has recently held a wide consultation with stakeholders at the national level, local stakeholders (with the case study of the island of Corfu) and with stakeholders from the Mediterranean region. Some of our guests today took part in the consultation and some interesting findings came back. So, what I would like to do is briefly share some of these findings with you and invite our guests to comment.

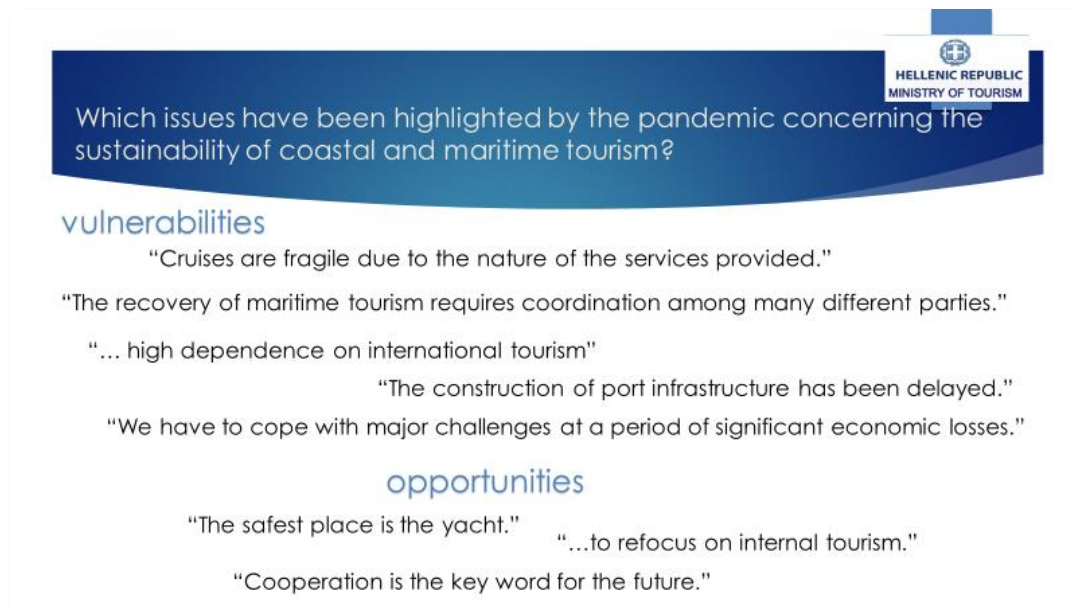
1. Which issues have been highlighted by the pandemic concerning the sustainability of coastal and maritime tourism? (vulnerabilities-opportunities)

KONSTANTINA TSAKOPOULOU

The first question that we tried to tackle during consultation had to do with the impact of Covid-19 on the industry. This is the first question I would like us to address today as well.

It seems that, according to our findings, the pandemic has exposed the vulnerabilities of the tourism eco-system. Some branches have been hit a little bit harder due to the nature of their activity. Cruises, for example, have to do with many passengers staying aboard the ship for a long time. Other branches have proved more resilient, like yachting. Furthermore, destinations have been deprived from an important source of income, in large part due to their dependence on international tourism. Therefore, we tried to talk about how we could diversify and refocus on internal tourism, for example, to be more resilient. So, I would like to stop here for now and give the floor over to my guests, starting with Mr Ikkos.

Mr Ikkos, would you give us your views on the impact of the pandemic on Greek tourism.



HELLENIC REPUBLIC
MINISTRY OF TOURISM

Which issues have been highlighted by the pandemic concerning the sustainability of coastal and maritime tourism?

vulnerabilities

- "Cruises are fragile due to the nature of the services provided."
- "The recovery of maritime tourism requires coordination among many different parties."
- "... high dependence on international tourism"
- "The construction of port infrastructure has been delayed."
- "We have to cope with major challenges at a period of significant economic losses."

opportunities

- "The safest place is the yacht."
- "...to refocus on internal tourism."
- "Cooperation is the key word for the future."

Slide 1: Introduction

ARIS IKKOS:

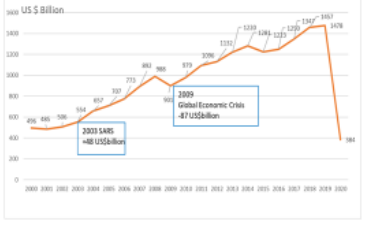
Thank you very much. I'll be more generic, as there are a lot of experts on the table that have much deeper knowledge than I do on the specific subjects. I will give more of an overview.

The outbreak of COVID-19 caused an overall collapse of all tourism, not just of one type of tourism product or another. According to a rather recent release of the UNWTO, there was an estimated drop of 74% in arrivals worldwide (see slide 2 below). Previous shocks, like the one caused by the SARS or the great financial crisis, are nothing compared to the shock caused by the pandemic. This is a unique event for the last 30 or 50 years. Greece was no exception to that and, according to data issued by the Bank of Greece, arrivals and revenues fell by almost 76%, so we were very close to the world average. Of course, the cruise industry was hit much harder with a drop of 99%. In Greece, sun and beach is the most important tourism product. This form of tourism was equally hit, but what we see in various surveys that followed is that now it is the product most sought after by potential tourists. Even if they identify themselves as city-breakers, they seem to be looking very much for a sun and beach tourism product.

I think that, when talking about maritime and coastal tourism, it is very important to consider the islands, as for many of those islands, tourism is the main or the only economic activity. Therefore, this collapse had a very big toll on several communities that depend on tourism. One more thing I would like to mention is that in Greece, according to an estimate we had in 2018, the direct contribution of maritime tourism (namely, the cruise industry, yachting and coastal traffic) was about 2,3 billion euros, that is close to 1.3 - 1.5% of the Greek GDP. Of course, we should always keep in mind the additional indirect contribution of the sector to the national economy. It is an important activity for Greece, and we look forward to the recovery of the sector, although we do not expect that this is something that will happen soon. Thank you.

Impact of COVID on Sea and Coastal Tourism

- Collapse of international travel worldwide
 - UNWTO: -74% in arrivals and revenues worldwide
 - ALL tourism collapsed
- Greece
 - Arrivals and Revenues fell by -76% each (cruise by -99%)
 - Sun & Beach is by far the most important tourism product in Greece – and in the world
 - Tourism is the main / only economic activity in many destinations / islands.
 - Big toll on many societies in tourism dependent economies



INSETE INTELLIGENCE

3

Slide 2: INSETE – Impact of Covid-19 on coastal and maritime tourism

KONSTANTINA TSAKOPOULOU:

Thank you Mr Ikkos for the data and the analysis. Mr Vasilikos, COVID has exposed our vulnerabilities and accelerated change. How would you comment on this?

ALEXANDROS VASILIKOS:

Good afternoon. I think that, undoubtedly, we all felt very deeply the consequences of this crisis. There are many facets and ways to look at things, but we must all agree that if we look a year back the expectations, we all had, were for a much faster recovery. The shock that everybody felt created expectations that we don't really see coming true today. As things go along, we see today that probably people are more interested in regaining their habits rather than changing. This could also be a challenge because, what was underlined in this crisis for me, was that we need to accelerate things that we had already seen. I don't think that the COVID crisis brought surprises. All these challenges that lie ahead do not have the same time frame anymore as pre COVID, such as a 5-, 10-, or 15-year frame for sustainability, for instance. Today all this is much **more concentrated in time**. Therefore, the positive part is that we were not surprised by the post COVID tendencies. The negative part is that for coastal tourism most of these challenges are even more important than for other destinations.

Pre COVID we already knew about the problems of sustainability and, bearing in mind the character of Greece, the coastline and the islands, it is definitely more accentuated than in other places in Europe. Therefore, **seasonality** is a very important factor that we need to deal with because it creates a very bad equilibrium between summer and winter. We need to face the opportunities that these challenges offer (like Churchill said "never let a good crisis go to waste"). We need to see how we can turn this situation around. We have high seasonality that results in overpopulation in the summer and underpopulation in the winter. The solution lies in the new ways of traveling. We do not see travelers as we used to see them before, therefore we need to create infrastructure for people who will stay longer (whether they are called winter birds or digital nomads). These trends existed before but we need now to invest in different ways and create other types of infrastructure. On the other hand, we should believe that we will see an abrupt

change in the way that people travel. There will always be **mass traveling**, since mass traveling does not come from the offer side but from the demand side and it is the way for lower income households to have the possibility to travel at good prices. If people need to express their need to travel, there will be trends like mass tourism.

We don't need to say much about **sustainability**. We have all seen in a positive light the fact that the rhythms of traveling fell and gave a breath of fresh air to the planet. This is a positive side of COVID. **COVID is teaching us a very good lesson** and it will accelerate the move in the direction of sustainability. Let's not forget that one of the pillars of sustainability is economic sustainability. The tourism sector was already facing a very big shortage of workers, and this will unfortunately be accentuated. Therefore, a big upskilling and reskilling program will need to be set up. Accessibility is also something that has been discussed in depth before. This will also be accelerated. The good news is that the billions of European funds that will be available, will act like an accelerator of all these phenomena. Technology is an important tool rather than a challenge or opportunity and there is an urgent need for a tech upgrade. Another phenomenon that we find in all European countries is the fact that tourism consists of mainly small and medium enterprises.

This is an overview of what we are to face. We must not paint the image in black, but we must bear in mind that it is not white either. The road to recovery is long but I think we have the tools and the will to create new products to be aligned with the needs that were underlined by this crisis.



Acceleration of existing challenges and opportunities

- Seasonality
- Sustainability
- Skills
- Accessibility
- Technology

Slide 3: Hellenic Chamber of Hotels – Acceleration of existing challenges and opportunities

KONSTANTINA TSAKOPOULOU:

Thank you. Let's keep in mind what you said, that we were not surprised, that we need to acknowledge the opportunities. Mr Vernikos, I would like to give the floor to you.

GEORGE VERNIKOS:

Thank you. I would like to congratulate the organizers of this meeting and I will speak very shortly as I do not want to repeat what has already been said by the excellent speakers in this panel.

I would like to remind you that tomorrow is the day of the environment, according to the UN. It is obvious that the aim of this celebration is to make the earth habitable for the human kind. I am very happy to see that during the years it has become more and more obvious that our most

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important goal must be to preserve our nature and the climate. And for this reason, the more we understand and believe in the sustainable development goals for 2030, the best it is for all of us. I just hope that the number one lesson of the pandemic is understanding the need to safeguard our planet, to be ready for the unexpected and love what we already have. As for the people in the sea tourism business, like myself, the number one lesson is to love our waters, to love our oceans and protect the planet. I would also like to congratulate you that today we sign an agreement between the Ministry of Tourism with the UNWTO to establish the Research Center for maritime tourism.

I believe that it shall greatly contribute to better understand and to prepare ourselves for the future. When we speak about the environment, we think of **environmental, social and economic sustainability**. These are the spheres that we must put together. From my point of view, coming now to more specific things about the challenges of the pandemic, I hope that this situation opens opportunities to discuss about our future. I would also like to stress the importance of the blue economy for the national economy.

From the point of yachting, that I represent here today, I want to say that **I fully agree with the conclusions that the Ministry of Tourism has presented to us**, which were the results of discussions with all the stakeholders. The main results were that:

- stakeholders at all spatial levels agree that tourism massification is an issue for Mediterranean destinations,
- large volumes of tourism flows raise the need to manage energy consumption and accommodation,
- that flows are not evenly spread through the territory.

Several stakeholders have stressed the fact that limiting the number of arrivals should be the last resort, that overtourism is actually a lack of proper management and that the biggest challenge is not to return to the situation we had before, but to face the challenges and opportunities that we are now dealing with. Local stakeholders stressed the fact that they remain excluded from the process of strategic planning, that tourism is a variety of sectors and that integration policies are required, which are often a challenge for small countries like Greece.

I fully agree with all these remarks. Let's hope that our efforts will contribute to the sustainable growth of our sector. Let's hope that all policies will align with those of the UN, the Blue Economy and with the principles of sustainable growth. I was very surprised yesterday, when I had dinner with some friends from different countries and I was in a table with representatives from Georgia, Ukraine, Uzbekistan, that I learnt that the title of the minister of economy in Georgia is "Minister of Economy and Sustainable Development". This is a step forward. Sustainable development must be at the center of the economy. Thank you again for all your efforts.



Slide 4: Vernikos George – economic, social and environmental sustainability

KONSTANTINA TSAKOPOULOU:

Thank you Mr Vernikos, it is a real honor to have you with us today. I would also like to thank you for reminding us that we must put everything under the umbrella of sustainability and for acknowledging the results of the consultation. Mr Katsikadis?

STAVROS KATSIKADIS:

Good afternoon, thank you Mrs Tsakopoulou. I would like to start by congratulating the Ministry of Tourism for this initiative and for organizing this meeting here in Athens.

I represent the Association of Greek Marinas. Most of our members are private members, marinas which were established by the private sector. We started 20 years ago. Our association was established in the last 10 years. During COVID-19 we sustained losses because transient boats and yachts were not able to visit the Greek marinas last year. The percentage of our losses was close to what Mr Ikkos mentioned before, about 78%. At the same time, we realized the resilience of the Greek marina sector and the importance of its contribution to maritime tourism. Without the marinas we wouldn't have the infrastructure necessary for yachting. We had to quickly adapt to the new requirements and we have learnt some useful lessons. It is true that the Greek marinas have a long way ahead to upgrade services and management. We have learnt our lessons and had to establish new tools and best practices. We developed crisis management plans which we immediately implemented. Digital transformation also helped us use some new communication and management tools to be more effective during the crisis. Good things came out from this period for the Greek marinas. Now we are at the post Covid era. I want to believe that we all feel that in Greece, the whole Europe and the whole planet much better days will come for the tourism sector. We are all very optimistic. We hope that this season will be very good for Greek tourism. We can see **strong demand for safe berthing and marina investments in Greece** and that is very good for us.

Of course, there is a need for new marina infrastructures, mainly in Athens, in the city marinas. Before Covid we came out from a financial crisis which lasted 10 years. We have run back in terms of new investments in new berths. Now we must move faster. The post COVID-19 period means that we need a **simpler legislative framework**, less bureaucracy. We need to give space to interested investors coming from Europe and the USA. We must see how we will achieve to

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extend the charter period to extend the viability and profitability of our yachting business.

Of course, our target will always be **home-porting**. Greece is an ideal destination for yachting so with new infrastructure and the upgrading of our services we are sure that we will be able to increase the home-porting part of our GDP in the yachting area. This will only be achieved if we all work together, all the parties involved in the yachting business. We are willing to cooperate, as this is the only way to sustainable growth. This must be clear to the local communities. Wherever we invest in marinas - either in cities or in the Greek islands - we must respect the local communities, our national culture and our precious environment. Thank you.

SUSTAINABLE GROWTH OF COASTAL AND NAUTICAL TOURISM IN THE MED REGION: CHALLENGES AND OPPORTUNITIES



GREEK MARINAS

- Resilience of the Greek marinas' importance and contribution in the Nautical tourism sector
- Quick adaptation to the new requirements, new tools and best practices – crisis mgt plans - Digital transformation — e-solutions - less bureaucracy – less transportation – lower CO2 impact
- Strong demand for safe berthing and marina investments in Greece
- Need for new marinas' infrastructure, simpler & integrated legislation, extension of charter period, home-porting, promote Greek yachting advantages & new destinations
- Strategic co-planning for sustainable growth with respect to the local communities, our national culture and our precious environment

Slide 5: Greek Marinas Association – Sustainable growth for coastal and maritime in the MED region

KONSTANTINA TSAKOPOULOU:

Thank you for placing the emphasis on cooperation. Cooperation was a key word during the consultation for many stakeholders. I would like to give the floor now to Mr Karakostas.

ANGHELOS KARAKOSTAS:

Thank you for the opportunity to be in the panel today to represent the Greek ports. The cruise industry faced this year a huge, sharp decrease and reached almost close to zero in 2020. It is an industry that needs a high level of investment but exhibits a very slow return. For the port of Piraeus, there is an investment plan of 120 million in infrastructure and 60 million in supra structure to be able to accommodate a new generation of cruise vessels, which accommodate about 7000 passengers each. About 850 arrivals were scheduled for last year and at the end we had zero. We only registered 76 calls for crew change or for supplies. This year, the cruise ban stopped in June, so about 420 arrivals have been scheduled. For the following year, according to the information we have, the number goes up to 750 which is very close to the 2019 year. There is an effort for the cruise industry to recover.

We would also like to pinpoint that this year cruise companies start from the Mediterranean, even though traditionally their starting point was the Caribbean. This is a great surprise, a positive one for our country. A very important issue concerning restarting cruises is how to reconcile the **protection of the local population** with the requirements of the cruise companies. All

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ports which are members of our Union, tried their best to cooperate with the state health authorities to create an environment that is safe for the guests and the local population as well. This is very important for us. We believe that during the next years the cruise industry will contribute greatly to the national economy and to the economies of the Greek regions. Our ports are ready to accept the cruise vessels and give the maximum support to the Greek economy. Thank you very much.



The importance of tourism for the economy of the region emerged

There has been a significant loss of revenue for cruise operators, ports and supporting companies and foremost for regional and national economy.

The pandemic has shown that tourism is a high investment - high volatility activity. We must consider this fact when assessing our performance and our policies.

Mediterranean became the key restart area.

Restarting tourism is not a given that will be achieved successfully. Cooperation and pragmatism are necessary.

Slide 6: Hellenic Ports Association – The importance of tourism for the region

KONSTANTINA TSAKOPOULOU:

Thank you for looking forward and for giving some optimistic messages. Mr Skoulikidis, the floor is yours.

MICHAEL SKOULIKIDIS:

The Greek Yachting Association represents crewed motor-yachts, with the length of 25 to 30 meters. We may have a more optimistic view than the rest because we represent a different tourism branch. Despite the many problems it caused, the pandemic also proved **how resilient yachting is**. It remained one of the safest ways to enjoy vacations due to the safety that a small, controlled environment offers. The pandemic challenged our industry, but it also sharpened our reflexes. We acted fast:

- We put strict protocols in place, the crew did PCR testing and the boat was disinfected before every charter.
- We started to cooperate with private plane companies who could also provide air ambulances with portable medical isolation unit.
- We found new ways of marketing our product, such as virtual charter shows, to replace the events that were cancelled, or marina open days to maintain momentum and keep the conversation open.
- We became a lot better at cost cutting.
- We reached out to new operational territories (the Adriatic, Turkey, West Med and the Red Sea). In fact, some of the yachts recorded close to a double season due to Red Sea charters.

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Providing a **meaningful experience** has become the new trend: people wanted to do something special, have an adventure instead of traveling halfway around the world just to be in a luxury hotel. So, they chose to charter a yacht. People stayed onboard longer because they could isolate and still work remotely thanks to the advantages of technology, the internet and mobile phones. Bubble travel with family, friends or corporates is easier on a yacht because you can always control who steps onboard. These are the most important **opportunities** that the pandemic created for the super-yacht industry.

MICHAEL SKOULIKIDIS
PRESIDENT-GREEK YACHTING ASSOCIATION (GYA).



Despite the many problems it caused, the pandemic also proved how resilient yachting is. It remained one of the safest ways to enjoy a vacation due

- 1) to the safety that a smaller, controlled environment offers
- 2) the fact that UHNWIs could minimise their risks when traveling to reach the vessel

Slide 7: Greek Yachting Association – The pandemic proved how resilient yachting is

KONSTANTINA TSAKOPOULOU:

Thank you for pinpointing difficulties but also opportunities for yachting during this period. I would also like to point out that the slogan that stemmed from the consultation with national stakeholders was that “the safest place for a vacation is the yacht”, because the only risk, for example, would be the air transport, which might even not be a risk at all, as we discussed earlier.

Thank you so much and before we move on, I would like to share with you the views of Mr Andreas Stylianopoulos, who unfortunately did not manage to be with us today because he is aboard the APEX and connectivity is poor. I would like to share his comments on the impact of the pandemic on Greek tourism:

ANDREAS STYLIANOPOULOS:

The pandemic gave everyone more time to think and if it highlighted anything for some, it was to realize where the course of tourism development was going wrong. Apart from being a serious disruption, it was also an opportunity to examine sustainability issues without the pressure of the pre-COVID19 “business as usual”. When it comes to cruising, it is clearer now that unless Greece develops a **long-term holistic tourism strategy** that will enable more viable destination choices, the weight of the traffic will continue to be carried by the usual few. Cruise lines need to sell their product and to do so - especially mainstream market operators that are more challenging due to their larger ships - they must offer destinations with high name recognition. This is the reason why Mykonos and Santorini are in all their East Med itineraries. This is a sustainability threat for such destinations, as they also suffer crowding issues that come from other forms of tourism.

2. What is the impact of coastal and maritime tourism on economic, environmental and social sustainability of tourism destinations?

KONSTANTINA TSAKOPOULOU:

This is the best introduction to our next round, which has to do with the impact of coastal and maritime tourism on the economic, environmental and social sustainability of destinations. One of the main points that came out of the consultation was precisely this, that tourism massification is a characteristic of the Mediterranean, but however large the flows, however big the problems and the challenges, limiting the number of arrivals should be our last resort. We must consider better management and **overtourism is actually a lack of proper management**. I would like to give the floor over to Mr Vasilikos to comment on this.

What is the impact of coastal and maritime tourism on the economic, environmental and social sustainability of tourism destinations?

challenges

"The biggest challenge is not to return to the previous situation, to what we had before, because it was unsustainable."

"Limiting the number of arrivals should be the last resort. Overtourism is actually a lack of proper management."

proposals

"Since you cannot extend the day, we need new destinations"

"It is imperative to measure and monitor tourism flows for the industry and destinations alike."

"We need to work in a more integrated way and adopt a holistic, territorial approach"

Slide 8: Brief presentation of the results of the consultation concerning the impact of coastal and maritime tourism on sustainability

ALEXANDROS VASILIKOS:

Since I am the only person on the panel who looks at coastal tourism from the land side, I will give you a few numbers.

Let's not focus on the negative impact only. We must acknowledge the significance of European coastal tourism. When it comes to coastal tourism, we must bear in mind that four out of nine nights, nearly half of the time spent in accommodation establishments in general in the EU, are spent in coastal areas. This is of very high significance for islands and coastal areas all around the Mediterranean. Half of the European coastal tourism jobs are in the Mediterranean, but bear in mind that the Atlantic, the Baltic and the Black Sea region have significant rates as well. Coastal areas are important for **growth and jobs**. Concerning young people, 45% of tourism workers are between 16 and 35 years old. Accommodation in coastal tourism generated almost 1 million jobs, 45% of coastal tourism direct employment in 2017. Moreover, it generated 67,2 billion euros in turnover, which is an increase if we look at the macro approach. Compared to 2009 there is an increase of 25%. In 2017, a third of all hotels and similar establishments were located near or in

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coastal areas. Bearing in mind these characteristics, it is also very important to come forward with some thoughts and solutions that will guide us to the next day. Very briefly:

- We need to **stimulate performance and competitiveness** in coastal areas, and develop a network of stakeholders, to diversify the offer but also to create new flows of demand.
- National authorities need to promote regional activities. Like Mr Vernikos said to the point, we are now sure that in many cases we must not return to the old scenarios, so dealing with **overtourism** must be a priority and there are practical ways to get there.
- We need to promote the registration of hosts with local authorities. Let's not forget that overtourism did not appear in Greece and other parts of the world before the arrival of new forms of housing like AirBnB and short-term rentals.
- We need to respond to **insularity** and to promote the quality of touristic offer during the whole year and develop national strategies to ensure the coherence of tourism offer and accessibility.
- **Promoting skills and innovation** is also a major issue, as well as attracting and retaining the workforce. Let's not forget that tourism during the COVID crisis already had problems and now is facing the fact that many people have left tourism to go to other industries.
- Another goal is to **improve accessibility**, develop manuals and checklists for hoteliers and restaurateurs, e-learning tools and favor the exchange of best practices, because we too have very good examples in some areas of Europe and in Greece concerning accessibility.

Overall, it is very important to set the practical steps that we have to follow in order to retain this very important economic activity which is coastal tourism and which for many areas in Greece is close to being the unique possibility of economic activity and recovery from now on. Overall, although the picture is not very bright and we are still in survival mode, I do believe that tourism and especially coastal tourism, if properly planned, will be able to help local societies exit this financial crisis and move to a more prosperous and sustainable tomorrow.



HELLENIC CHAMBER OF HOTELS

European Coastal Tourism Hospitality Snapshot

- Four out of nine nights spent in accommodation establishments in the EU, are spent in coastal areas
- 45% of tourism workers are between 16 and 35 years old
- 67,2 billion EUR in turnover

Slide 9: Hellenic Chamber of Hotels – European Coastal Tourism Hospitality Snapshot

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KONSTANTINA TSAKOPOULOU:

Thank you. To develop sustainably is a powerful tool and we are all aware of that. The pandemic has also made local communities very much aware of this and we do need new practices, as you said, that will enhance resilience for the future. Mr Katsikadis, the floor is yours.

STAVROS KATSIKADIS:

I would like to refer to some indicators. According to Dr Ikkos, the contribution to the GDP was almost 1,5% two years ago, and 43.000 jobs have been registered in our sector, not only in the marinas, but also in yachting. For every 100 marina berths we build, we create 4,4 direct jobs, and in the case of Greece, the average is 6 direct jobs created from every 100 marinas berths and 100 indirect jobs. The revenue for the state (from the rents and the concession fees) is high, because all the marinas in Greece pay a very high rent, but contracts must be kept. For almost 10 years, Greece suffered from the financial crisis and now there is the COVID pandemic, but agreements are kept. Another interesting indicator is that for each euro of mooring fee the multiplier is 5 to 10 euros of expenditure in the local economy (this comes from fuel, provisions, shipyards, maintenance services etc).

And of course, for us, for the communities, for the locals, **a marina means that they can enjoy an upgraded sea-front premise, a clean environment**. It is very important to underline that this is a safe and accessible environment. All citizens, according to the Greek Constitution, have free access to the marinas and that is a value for the community and for the people. Marinas in Greece do not offer benefits only to yacht owners and the yachting market but also to the communities, to their citizens and to the municipalities. These are the benefits of the marinas, and this is what we should communicate and explain to the people and the public. According to our study published in the beginning of 2020, when COVID and the pandemic were still unforeseen, we have estimated that we could double the benefits in numbers and revenue for the state and for our business in the yachting if we follow the right strategy in the next years. And that is what we should all do. Thank you.

SUSTAINABLE GROWTH OF COASTAL AND NAUTICAL TOURISM AT MED: CHALLENGES AND OPPORTUNITIES



GREEK MARINAS ADDED VALUE TO THE STAKEHOLDERS

- Marinas and Yachting contribute 1,41% of GDP with 43,000 jobs
- 100 marina berths create 4,4 – 6 direct and 100 indirect jobs
- Generate revenues for the State (concession fees, income taxes, employer contribution fees)
- 1 euro mooring fee generate 5 to 10 euros of expenditure in the local economy (fuel, provisions, maintenance, services, etc.)
- Upgrade the seafront premises, aesthetics, clean environment
- Safe and accessible infrastructure for the community, with water sport activities and sailing schools
- Opportunity to increase the added value and contribution of yachting and marinas to the Nautical Tourism sector

Slide 10: Greek marinas added value to stakeholders

KONSTANTINA TSAKOPOULOU:

Roundtable with Greek stakeholders: Measuring and monitoring coastal and maritime tourism

Thank you for sharing all this data. You have showed in the most eloquent way the significant multiplier that are the marinas. Mr Vernikos the floor is yours.

GEORGE VERNIKOS:

For our discussion I want to emphasize that the impact of coastal and maritime tourism on the economy, the environment and the social sustainability of tourism destinations is very important especially for countries like Greece. For small islands, coastal and maritime tourism is around 97% of the Gross Product.

I believe that we need a **world partnership for a sustainable and productive blue economy**, this must be the central message of this meeting. At the same time because this is the UNWTO, I would like to say that, about yachting, we must establish **common laws, taxes, employment rules, free circulation, safety requirements for all countries**. For me, our top priority must be to work together to have common rules regarding coastal and maritime tourism. Especially for the maritime tourism this is the number one thing that I would like to see. Regarding climate, we must work for a world partnership to achieve this. I fully endorse all the proposals that were put on the table today and, as a stakeholder, I want to congratulate you for all your efforts. Thank you.



Slide 11: Vernikos George – Setting the right conditions

KONSTANTINA TSAKOPOULOU:

Thank you Mr Vernikos so much for being with us here today, for coming and for sharing your experience and views. Mr Karakostas.

ANGELOS KARAKOSTAS:

The contribution of the cruise sector to the Greek economy in the past years was around 600 million. A large part of it is channeled into the periphery. Based on the numbers that we have from our cooperation with the cruise operators, we estimate that this contribution can double within a 5-year period. Of course, the constraints mentioned by Mr Stylianopoulos about Mykonos and Santorini - the fact that they need to accommodate large numbers of guests on the island - are very important and must be dealt with. We must manage the flows. **Islands such as Mykonos and Santorini are necessary if we are to develop home porting in Greece because** cruise operators want to include them in their itinerary. It is very important not to discourage the operators from the cruise sector and to find solutions on how to manage the flows.

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On the other hand, it is certain that **cruise operators are looking for new destinations**. Over the past three years, many destinations have emerged in Greece and I believe that, with the support of the state, we can create new destinations, which will make the itinerary at the Aegean and the Ionian Sea much easier for the operators. Thank you very much.



Contribution of maritime and coastal tourism to the economy, the environment and the local community

Cruises are a crucial component of maritime tourism. They generate an income of about 600m per year for Greece, with an important impact on regional economies that is hard to evaluate.

To combine operational economies of scale and long-term viability of tourism destinations is a challenge.

It is crucial to remember that tourism creates not only direct economic benefits but also indirect, in order to be able to identify the best proposals.

Data collection and analysis improvement needs are obvious.

Slide 12: Hellenic Ports Association – Contribution of the cruise industry to the economy, the environment, and the local communities.

KONSTANTINA TSAKOPOULOU:

Thank you. Mr Ikkos, one of the findings of the consultation was of course the dependence of many communities on tourism and the need, put forward by stakeholders, to create synergies with other sectors and create new destinations in the mainland. How would you comment on this?

ARIS IKKOS:

A lot of the ongoing discussion about the impact of the pandemic has focused on sustainability and digital transformation. In my view, both these issues were on the table before the pandemic, and the pandemic basically accelerated them, especially on digital because we forced ourselves to do things that might have taken us three or five years otherwise. There are some other issues that are a direct result of the pandemic. Starting with one that you just mentioned. The pandemic has brought back the discussion about **tourism being a monoculture**, which is in my opinion a plainly wrong argument. The reason why tourism developed in the islands was not because other island activities were forced out. The reason was that in today's international division of labor, it is very hard to see what other economic activities could be promoted on the islands or perhaps in the remote mountain areas except for tourism activities. Concentrating on tourism creates an environment where you have a lot of other activities, and it becomes a much livelier and more interesting place.

As a country, we should try to take further the **digital nomads'** idea and attract people who can work from far away. A freelance translator can work from anywhere in the world and send the translation, or people who work with a computer and don't need to have any physical presence. We should try to attract them, to relocate permanently on some of our islands and that will create a completely different environment and a completely different vibe in these islands off-season as well.

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For many years, especially in this country, to try and take across the message that tourism was the main beneficial activity was difficult and now we see those arguments about tourism being a monoculture again at the forefront. One must bear in mind that, a few years ago, Nokia was the ruler of the world in mobile phones. But, some years later, iPhone came out and Nokia was wiped out. So, the argument about the risk of monoculture does not apply only to tourism, but to all corporate products.

Another important issue is the damage caused by COVID-19 to the airlines and the tour operators in the industry. They have suffered immense losses and they still have a very low visibility. The airline industry operates with early bookings, to have stable cash flows to plan and develop its routes and itineraries. Now the visibility is maximum two or three weeks. If you visit the site of Athens International Airport and of other airports as well, where they announce the schedule of the flights, you will see “valid until” at most two weeks from now. In a normal year we would have a little bit less in September or October. That shows you how difficult it will be, for a country like Greece to recover, if we don’t get back the flights and the tour operators. 90% of our income in tourism is from traffic coming by plane from other countries.

Moreover, I believe that one more long-term damage is that, because of the pandemic, people have started thinking about tourism in a different way, there is a risk now that was not in anybody’s mind before. **Banks and other financing institutions will lend money under different conditions** and a lot of people will consider taking a **job in tourism** as perhaps taking a **risk**. This is indeed very common, to have difficulties in recruiting the right staff in tourism businesses. Of course, there is a silver lining in the clouds, many people have realized how important tourism is at securing a good standard of living. We must **approach tourism with a more strategic mindset** and try to support the industry build up in a way that it becomes attractive, and varied, and an interesting product overall. Thank you.



Solution

- The threat and the problem were generated by factors totally external to tourism, but tourism in 2020 did not aggravate the problem
- The solution has to come from outside the sector – and will benefit everyone, not just tourism: Scientists have warned for years now about the dangers of pandemics in an interconnected world.



▶ 1:49

“There may and likely will come a time in which we have both an airborne disease that is deadly. And in order for us to deal with that effectively, we have to put in place an infrastructure —not just here at home, but globally—that allows us to see it quickly, isolate it quickly, respond to it quickly, so that if and when a new strain of flu like the Spanish flu crops up five years from now or a decade from now, we’ve made the investment and we’re further along to be able to catch it.”

President Obama, 2014

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Slide 13: INSETE – The threat of COVID-19.

KONSTANTINA TSAKOPOULOU:

Thank you for your remarks on monoculture. I think that if we go back in time and recall coastal and insular destinations during the fifties, we will acknowledge the positive effect of tourism. Mr Skoulikidis, for some final remarks, please.

MICHAEL SKOULIKIDIS:

Roundtable with Greek stakeholders: Measuring and monitoring coastal and maritime tourism

To assess the contribution of maritime and coastal tourism to the economy, the environment, and local communities, let's start with yachting's contribution to the economy. Yachting is a significant and reliable source of income even in times of severe crisis. It contributes with a high expenditure per guest, with the creation of thousands of jobs and the procurement of many ancillary services. Together with ancillary services, it amounts to close to 2% of the Gross National Product. Super-yachts use Greek shipyards for construction, service and repairs. They employ 5,000 crew members who pay social security. If we count ancillary services and the indirect contribution to employment, we are looking at 120,000 jobs. To put it in numbers: chartering a large yacht with a Greek license for 12 guests costs nearly 1,500,000 million euros per week including expenses, that means 250,000 euros per week. No other tourist activity can compare with this level of expenditure. Nothing even comes close.

Yacht owners are already exploring green building and operating practices. They have the resources and the will to move forward to sustainability. This is something that we filter through the whole boating industry. Preserving the environment for future generations and ensuring that water waste is clean is a matter that concerns us all. Consumers, and that includes yacht owners and guests, want to be as environmentally friendly as possible. To reflect this desire, yacht builders are moving ahead with sustainability practices, sometimes adopting technologies from other industries. We are seeing more and more clean propulsion systems based on electric, hybrid fuel saving technologies. It is all about reducing CO2 emissions: all new engines have lower consumption and reduced CO2 emissions. We have now better choices when it comes to raw materials. Timber is resourced from environmentally managed forestry resources and bio-residues are being used. We are seeing higher levels of waste recovery and recycling. Energy consumption is taken into consideration in the early stage of design, and they are trying to implement designs that are faster and fuel efficient.

Last on this agenda but not least, the impact that yachting has on local communities. The privacy and security that yacht owners and guests look for, means that they visit more remote destinations and bring life and activity where it is most needed and, also, help to even out the tourism flow. This is the exact opposite of massification. A limited number of visitors who spend quite a lot of money and cause less disturbance to the environment. The best way to grow is in a sustainable manner.

The outlook for Greek yachting is positive overall, even though we do have substantial challenges to face. What are they?

Intense competition from neighboring countries presents a big challenge for the sustainability of Greek yachting tourism. The VAT rate is too high for our location: we are on the eastern European boarder and our neighbors have taken advantage of the fact that they have no VAT. We have increased operational expenses due to social security and taxes, making our tourist product more expensive than the competition and allowing them to have better prices or a larger profit margin. We are not in favor of closed seas, but we do believe in fair competition.

We need to become more competitive and that would involve:

- A national strategy, a new legal framework that applies only to yachting, resolving issues of overlapping competencies between the ministries of shipping, tourism and finance.
- A sea tourism yachting committee: one has been approved but is not yet operational.
- Harmonization of the European Union Mediterranean countries legislation, so that guests don't get confused when moving from country to country.
- We are also facing a shortage of berths in Athens. The existing berths cannot cover the growing demand, especially during summer season for super and mega yachts.

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Despite all difficulties, exploring the Greek coastline and islands is a heavenly experience for yacht owners and guests. When they return from their vacation, they generate the best publicity for Greece. Yachting brings revenue to the country and creates jobs. It contributes to the promotion of the Greek islands and coastal areas. The important point is that super yachts have no boarders, and that means that they can take advantage of every opportunity and avoid every problem. Thank you for your patience.

MICHAEL SKOULIKIDIS

PRESIDENT-GREEK YACHTING ASSOCIATION (GYA).



Yachting is a significant and reliable source of economic contribution, even in times of severe crises, with extremely high expenditure per guest, the creation of thousands of jobs and the employment of many ancillary services.

Yacht owners are exploring "green" building and operating practices. This will filter through to the whole boating industry.

The privacy and security that yacht owners & guests look for means that they visit more remote destinations and

- 1) bring life and activity where it is most needed
- 2) help to even out the tourism flow

Slide 14: Greek Yachting Association – Yachting’s contribution to economic, environmental and social sustainability.

3. Final Comments

KONSTANTINA TSAKOPOULOU:

I would like now to share the views of Mr Stylianopoulos and then give the floor to each one of you for just ten words that will be your closing remarks, your highlights. Mr Stylianopoulos wants to remind us of the Golden Mean and point out the fact that we find a way to develop tourism in a sustainable way. I will read his comments.

ANDREAS STYLIANOPOULOS:

Ancient Greeks invented the Golden Mean, something we have forgotten in modern times. If we only think short-term gains, then sustainability is not accounted for. Pre-pandemic cruising had an economic output globally of USD 154.5 billion and on average each cruise passenger spent 385 USD in a home port and 100 USD in a transit port. The natural reaction is to put environment and local wellbeing aside and grab as much of that action as you can, but is that sustainable?

It is not on any count and some destinations have realized that the Golden Mean is the way to move forward regarding sustainable tourism. Every destination has a different threshold and that defines the challenge for future sustainability. Pre-Covid 19 Venice alone had more tourists annually than all of Greece. Now the city is reconsidering its entire relationship with tourism and in anticipation of the post pandemic return to normality, we are already seeing many destinations that are reluctant to return to the previous situation.

KONSTANTINA TSAKOPOULOU:

I think this sums up nicely and I would like you to comment on this in your final comments on our discussion on resilience and sustainability and on how we can move on forward. Mr Vasilikos, would you go first?

ALEXANDROS VASILIKOS:

I think we can do it. It might look difficult, it might look painful, but I think we are mature enough to find the **equilibrium** between economic sustainability and the fact that we have a responsibility to give to the next generation something better than what we took from the previous one. This is something that we have lost along the way over the past years, and this is the time and opportunity to regain it.

ANGHELOS KARAKOSTAS:

Cruises combine the two main sectors of our country, shipping and tourism. For this reason, we believe that we can support this industry and achieve advantages for the economy and for society.

MICHAEL SKOULIKIDIS:

I think that the future of super yachts is very positive. It has a net increase around the world and in Greece. We are the paradise of yachting in the world with so many islands, our weather, our seas, we have no hurricanes, we have no hostile marine life, it is the **ideal environment for yachting holidays**. For this reason, a very positive future for yachting lies ahead. It is very important that superyachts have no boarders. This is an important point that the ministers of tourism, shipping and finance should keep in mind.

STAVROS KATSIKADIS:

Let's use the tools and the lessons learnt from the pandemic, work together and make our nautical tourism stronger in Greece.

ARIS IKKOS:

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I share the optimism of my fellow panelists and the confidence in the ability of the tourism sector to move forward and to recover. I had never thought, Mr Skoulidakis, that very high net worth individuals are a thriving market for you.

We must not forget that this is a much bigger issue than tourism. The problem was generated completely externally from tourism (the COVID situation), and, from the data available in 2020, tourism did not aggravate the problem. The solution must come from outside the sector and will benefit everyone and not just tourism. We have put forward during the past years the potential dangers of a pandemic in an interconnected world. I am sure that you have all come across this excerpt from Obama, warning that we should do something. But nothing was done. For tourism the big issue is how we can protect ourselves globally. If that is not possible, **we need to establish rules internationally that will allow the borders to remain open** even with some restrictions, but restrictions that are known to everyone, that are workable and that do not include surprise quarantines from one day to another. So long that this kind of legislative framework is in place, it is extremely difficult for tourism to recover. Once we adopt coherent rules, tourism will be able to recover very fast, because tourism seems to be a basic need for a lot of people in our days internationally.

KONSTANTINA TSAKOPOULOU:

Thank you all, each one of you for being here today. I would like to give the floor to my colleague, Mrs Kefala, Head of Research, for the closing remarks.

4. Closing remarks

STAVROULA KEFALA:

Thank you, Konstantina.

The discussion today has been centered around the approach that the current pandemic global challenge provides an opportunity to bring the community together, to set a forward-looking international agenda, recognizing the role of multiple approaches and diverse methods, understanding the relationship between society and the coastal and maritime sector. Efforts to address the substantial and diverse challenges facing marine and coastal environments have shown a growing call for greater consideration of the impact on local communities, how they interact with the marine environment, and the resulting implications for developing effective policy and management. Following three fruitful discussion workshops earlier today, on the challenges and future perspectives of coastal and maritime tourism, the areas tackled during this roundtable followed once again the categorization of economic, social, and environmental sustainability. The key results involve the need to identify gaps and specific needs for sustainable governance and management, aiming at protecting our markets and communities from environmental and economic vulnerability and achieving a balanced development of maritime and coastal tourism while respecting the set principles of sustainability.

Points brought up during this round table discussion, include:

- The need to develop new organized marinas, harbors, and ship shelters, and to improve and modernize existing harbors
- Investment in new infrastructure and protection of environmentally sensitive marine and coastal areas.
- Vulnerabilities and opportunities highlighted due to the pandemic
- Significant impact of the loss of revenue for companies, regional and national economy.

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- The importance of a resilient network of stakeholders and the fact that sustainable tourism can be only the result of joint action, collaboration and synergies.
- Matters of safety when accommodating guests
- The need for new forms of investment and new operational territories to balance offer and demand
- The investment in new waste management and energy saving infrastructure for the protection of environmentally sensitive areas.
- Strategic co-planning for sustainable growth with respect to local communities,
- Interconnectedness of coastal and island destinations for their dependency on tourism and its impact on their economies as well as coastal tourism contribution to employability.
- Implications for specific sectors such as yachting, cruise, marinas, ports and improvement of current legislation and regulations.

Solutions include:

- Stimulation of competitiveness, development of networks of stakeholders to diversify the offer.
- Promotion of national strategies to ensure quality and accessibility based on skills development to promote recovery and increase the added value and contribution to the coastal and maritime tourism sector.
- Alternative activities to sustain the well-being of island communities.
- The ways in which technology will assist sustainability and enhance competitiveness.
- The importance of evidence-based data for targeted action.
- The importance of marinas and their contribution to the nautical tourism sector.
- Adaptation to new practices.
- Strategic co-planning for sustainable growth with respect to local communities.

Finally, this discussion has highlighted the close ties between the industry, the economic stakeholders, and the local community to ensure regenerated host identity practices and develop joint policy recommendations for policy makers and other relevant institutional and civil society actors. As our discussion ended on a positive note, with a shared optimism, I concur with you, I thank you all for your cooperation, your insightful remarks, and invaluable contributions.

I hope you enjoyed our session, and we are looking forward to similar meetings and to our future cooperation. Thank you.