

Project title: “Initiative for improving the capacity and accessibility of tourism destinations in the cross-border area”
acronym “Destinations for all”

Deliverable 3.1.3. Elaboration of a joint methodology and implementing a survey on the tourist flows in Garmen at the beginning and at the end of the project - 50 man-days*200 EUR, 3 key experts (incl. expert fees, travel costs, sociological survey, interviews, statistical analysis, VAT, administrative costs, etc.) - content specified in an Annex.

Municipality of Garmen

<http://destinationsforall.eu/>

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ABSTRACT

REPORT 3 – FIRST PART: Study 1: Study to measure tourist flow at the beginning of the sub-activity project 3.3 Studies to determine the tourist flow in the region and forecast for tourist development

Activity 3 of Contract No118/16.04.2018 "Study and planning of the development of tourism in Garmen Municipality"



Introduction

The current study is sub-activity 3.3 studies for determining the tourist flow in the region and forecast for tourist development - **Study 1: Carrying out a survey to measure the tourist flow at the beginning of the project** from Activity 3 "Development of a joint methodology and carrying out a survey among the tourist flows in the Municipalities of Garmen and Thassos at the beginning and at the end of the project", contract No118/16.04.2018

Summary of the survey

1. Topics, objectives, scope and period of the study

Through studies to determine the tourist flow in the region and the forecast for the tourist development aim at assessing the impact and achieving the indicators of the financing program "Interreg V-A Greece - Bulgaria" 2014-2020. The investment priority under which the project is financed is 6c "Preservation, protection and promotion of natural and cultural heritage" is aimed at valorizing cultural and natural heritage in the cross-border region. The implementation of the project B2.6c.09/28.09.2017 "Initiative to improve the capacity and access to tourist destinations in the cross-border region" will contribute to the achievement of Thematic Objective 6 "Conservation and environmental protection and promotion of resource efficiency" of the Interreg V-A Greece-Bulgaria Cross-Border Cooperation Programme 2014-2020. In this respect, the studies should reach the information necessary to measure the indicator to achieve thematic objective 6c:

Increased number of visits to supported sites with cultural or natural heritage and attractions /number of visits per year/

The set value of the indicator under the project B2.6c.09/28.09.2017 "Destinations for all" is 7000.

The measurement of the indicator will be carried out through two separate studies to measure tourist flow (Study 1 to Report 3: Part One and Study 2 to Report 3: Part Two). The two studies are identical, the first with being conducted at the beginning of the implementation of the contract (the result of this report) and the second will take place at the end.

The main objectives of this study:

- **measuring tourist flows and the number of¹ visits;**

¹ In view of the objectives of the study, it measures incoming tourist flows.

- **assessment of the factors that are relevant for increasing the tourist flow** – this study measured the indicators set out in the Methodology, after the second surveys envisaged to provide a forecast for the tourist development in the region *of the Municipalities Garmen and Thassos*.

A period of this study is:

- **16.05 – 10.06.2018** measuring the initial value of the programme indicators and indicators

Duration of study:

- 25 days

Time range of the study:

In the range of data (statistical) for the survey is 1 year, with data scope state 2017 year.

To assess the factors that are relevant for increasing the tourist flow with and explores the characteristics of the tourist destinations at the time of the study.

Respondents to the survey:

For the survey of destination Garmen, the following main groups of respondents are covered by two separate surveys:

- ✓ *tourists* who visited the destination for short-term visits to specific tourist sites and/or with one in the accommodation – a total of **47 respondents participated in the survey**.
- ✓ *tourism service providers and economic operators* from sectors related to tourism – *tour* guides, tour operators (agencies and agents), hoteliers, restaurateurs, NGOs in the field of tourism, etc. – a total of **23 respondents participated in the survey**.

Territorial scope of the survey: the territory of the Municipality of Garmen and the Municipality of Thassos.²

The survey was carried out through developed joint indicators – unified for the two municipalities, for the measurement of which are specified a specific plan and a list of sources of information provided to the Municipality of Thassos. The specific data for the territory of the Municipality of Thassos were collected with the assistance of the Municipality of Garmen, as a leading partner in the project "Destinations for All".

² The date from Municipality of Thassos was provided to the Contractor with the assistance of Municipality of Garmen in its capacity as a lead beneficiary of the project.

The analyses of the surveys are presented in the detailed version of Report 3 FIRST PART: Study 1: Study for measuring tourist flow at the beginning of the project Sub-activity 3.3 Studies for determining the tourist flow in the region and forecast for tourist development.

I. Touristic flow in Garmen and Thassos

The main objective of the current first stage of the surveys, part of Activity 3, **is the measurement of tourist flow in 2017** (base value) in the regions of Garmen and Thassos to serve as basic information on the basis of which to determine the impact of the implementation of the project: B2.6c.09/28.09.2017 "Initiative to improve capacity and access to tourist destinations in the cross-border area ", "Destinations for all".

The general information at the beginning of the project for the regions of Garmen and Thassos is presented in the following tabulates and, developed in accordance with the matrices –databases, part of the Methodology for conducting a survey among the tourist flows (Sub-activity 3.1 of Contract No118/16.04.2018):

Table 1 Data Matrix needed to measure tourist flow, sources NSI and ELSTAT, Garmen Municipality and Thassos Municipality (2017)

| Municipality | Year | 2017 | 2018 | 2019 |
|----------------------|---|-----------------------|-----------------|------|
| | | *(for study I and II) | *(for study II) | |
| Garmen | number of properties | 50 | | |
| Thassos | | 209 | | |
| Garmen | number of beds in the accommodation | 1 136 | | |
| Thassos | | 10 313 | | |
| Garmen | number of nights spent - total | 93 626 | | |
| Thassos | | 771 580 | | |
| Garmen | number of overnight persons | 34 421 | | |
| Thassos | | 252 540 | | |
| Garmen ³ | Number of visits to the main tourist sites | 6 347 | | |
| Thassos ⁴ | | 60 651 | | |
| Garmen | Relative share of overnight tourists visiting the supported | 40% | | |
| Thassos | | 30% | | |

³ Antique Roman City Nicopolis ad Nestum and Landscape-historically Park "Gradishte"

⁴ Archaeological Museum, Museum of Zakhtina, the sanc shrines of Artemis and Dionysius, Ancient Theatre, Acropolis and Temple of Athens

| Municipality | Indicator | Year | 2017 | 2018 | 2019 |
|--------------|--|------|-----------------------|-----------------|------|
| | | | *(for study I and II) | *(for study II) | |
| | sites with cultural or natural heritage and attractions (%) | | | | |
| Garmen | Number of tourists who visited the destinations for the main purpose spa/ summer holiday, also visited the projects supported by the project | | 13 768 | | |
| Thassos | | | 75 762 | | |
| Garmen | TOURIST FLOWS - visits to the supported sites with cultural or natural heritage and attractions | | 20 115 | | |
| Thassos | | | 136 413 | | |
| | TOTAL TOURIST FLOW | | 156 528 | | |

When carrying out the survey at the end of the project, the baseline data for the tourist flow from 2017 should be taken.

Assessment of the factors that are relevant for increasing the tourist flow - the number of visits to the supported sites under the "Destinations for All" project, including:

- the springs of natural mineral waters in Garmen Municipality;
- the places in the municipality of Garmen, where the bicycle parking lots delivered under the project will be placed;
- camping in Thassos Municipality.

Among the main factors for increasing the tourist flow of the project-supported tourist destinations stand out the needs of:

- ✓ improving technical infrastructure - roads, streets, urban environment
- ✓ diversification of tourist activities and promotion/ advertising of the tourist destination
- ✓ improving the state of cultural and historical and natural sites
- ✓ improving access for people with disabilities