

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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Interreg
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Resume

REPORT 3 – SECOND PART: Study 2:
Study to measure tourist flow at the end of the sub-activity 3.3 Studies to determine the tourist flow in the region and forecast for tourist development

Activity 3 of Contract № 118/16.04.2018 "Study and planning of the development of tourism in Garmen Municipality"



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Introduction

The current study is sub-activity 3.3 Studies for determining the tourist flow in the region and forecast for tourist development - **Study 2: Carrying out a survey to measure tourist flow at the end of the project** by 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 study

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

The aim is to assess the impact and achieve the indicators of the funding programme 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 was carried out through two separate studies to measure tourist flow (Study 1 to Report 3: Part One and Study 2 to Report3: Part Two). The two studies were identical, the first with being conducted at the beginning of the implementation of the contract and the second conducted at the end (the result of this report).

The main objectives of this study:

- **measuring tourist flows and the number of¹visits;**
- **assessment of the factors relevant for increasing tourist flow – this study measures the indicators set out in the Methodology**
- **forecast of the tourist development in the region of Garmen municipality and Thassos municipality.**

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

A period of this study is:

- **11.09.2020 – 06.10.2020** to measure the final value of the programme indicators and indicators

Duration of study here:

- 25 days

Time range of the study:

In the range of **data (statistical)** for the survey is **3 years and**, as the data scope state **the period 2017 - 2019**. **The achievement of the indicators is also reported as of 16.07.2019 and includes the first half of 2019.**

To assess the factors relevant for increasing tourist flow with a reported characteristics of tourist destinations at the time of study is 1 and to date, in order to assess the impact of **Project: B2.6c.09/28.09.2017 "Initiative to improve capacity and access to tourist destinations in the cross-border region ", "Destinations for all"**.

Territorial scope of the surveyed here: 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.

I. Characteristics and prospects for development of the destinations of Garmen and Thassos

The two municipalities are recognized as tourist destinations with thousands of visitors each year. Garmen municipality is a famous national destination for spa tourism, eco and cultural tourism, with its mineral springs, its beautiful nature and historical attractions, and the municipality of Thassos is an international destination for marine and cultural tourism, characterized by natural beauty, important historical and cultural attractions and a large number of tourist attractions.

The main focus of the "Destination for All" project is the financing of tourist infrastructure accessible to people with disabilities, which is why the coverage of this group is a key moment in the conduct of the surveys on tourist flows.

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

Garmen Municipality is a destination mainly for spa/balneo tourism and family holidays. At the same time, the municipality of Omagh exceptional potential for tourism development in the two main specializations - combined strands:

- "Cultural and cognitive and rural tourism" and
- "Eco, health, adventure and cycling tourism".

At the beginning of the implementation of the project, Activity 1, sub-activity 1.1, 1.2, 1.3 and 1.4 of the contract No118/16.04.2018 a tourist Register has been established and a tourist potential has been established, on which recommendations and measures for valorization, storage and promotion are based, including improving access to the tourist sites of Garmen municipality, tourist routes have been established. Many of the recommendations have been implemented at present, including:

- Peacebuilding
- 8 indicative and 40 information plates are placed
- Placed sheds and bike cans, purchased bicycles for tourists
- Development of promotional/promotional materials (tourist catalogue, short brochures for the two main tourist specializations/ on routes) and distribution in the accommodation in Garmen municipality, in TIC and in accommodation in neighboring municipalities (Gotse Delchev), etc.
- **3D object capture** - an innovative promotional measure
- **Filmed a promotional documentary about the tourist attractions in the municipalities of Garmen, the Republic of Bulgaria and Thassos, the Hellenic Republic"**
- Developed Tourist Program for Tourism Development on the Territory of Garmen Municipality 2019-2024
- Publication of advertising information about destination Garmen in regional/national media (mostly online).
- A lot tour of the selected routes, as a type of promotional measure – provided for under the project "Destination for All" under the Subsidy Agreement: B2.6c.09/28.09.2017 "Initiative to improve the capacity and access to tourist destinations in the cross-border region", "Destinations for all";
- Participation of Garmen Municipality in 2 international tourist fairs
- **Garmen** Municipality participates in the newly established Organization for Management of The **Rila-Pirin Tourist Region**. The organizations for the management of tourist regions carry out activities related to the formation of regional tourist products and the implementation of regional marketing and advertising in a particular territory - tourist area.

As a result of the implementation of the project, the following objectives of the Destination for All project have been achieved so far:

- improved conditions and access to tourist attractions and facilities in Garmen municipality;
- advertising and promotion of tourist sites in Garmen and Thassos, including among people with disabilities;
- implemented policy for "solidarity tourism" in the cross-border area – improving access to tourist attractions for people with disabilities;
- increased tourist flows in both municipalities and the expansion of tourist target groups, including people with disabilities (as measured by this study).

Called **the Green Island**, **Thassos** is a real piece of paradise – with olive groves, pines, cypresses and evergreen shrubs. In addition to being surrounded by the crystal blue waters of the Aegean Sea, Thassos hides in its bowels numerous ruins of ancient towns and is shrouded in legends that give it extra charm.

Prehistoric and historical sites, archaeological sites of great importance, early Christian basilicas, monasteries, carved temple churches, mountain villages with traditional architecture are among the riches and advantages of Thassos. Archaeological finds all over the island testify to the rich history of the city. The town of Limenas (in Greek its old name was Thassos) - the largest town on the island, is located in a lush picturesque bay, the archaeological museum in the city **is interesting**, where objects from the 7th century BC to the beginning of the last century can be seen.

Another interesting destination is the old capital of the island - **Panagia**. Walking through the narrow streets along the whitewashed and stone-paved slabs instead of tiles is a real time travel. The colorful Kazaviti, in which one can not only admire the ancient houses and churches, but immerse himself in the silence, proclaimed only by swallows and flowing mountain water, and the remarkable time-asleep Theologos, in which the old-fashioned architecture is preserved and the traditions and customs - still alive, are just three of them.

In the fishing village of Aliko there is a pagan temple, erected in the 7th century BC. Hr.

The Archangelou Monastery was built directly on the rocks hanging over the sea on the way to Aliko. Panagias Monastery is located on the road to Maries and only one or two monks live in it. The Monastery of St. Panteleimon is located in the interior of the island, near the Kazaviti.

But Thassos is not just sea and ruins - many of its treasures are not on the coast. Shady tavernas on hot afternoons, dense green forests and a dome-shaped mountain whose, overgrown in centuries-old forests, Mount Ipsario manages to rise more than 1200 m above sea level, although the diameter of the island is only some 20 kilometers.

In fact, the island is formed of marbles, nays and slates of the Rhodope massif, and its marble is famous from the time before Christ. The green slopes of Thassos have tucked

into their beautiful, old mountain villages, tucked away from the raids of pirates in the past.

The island is famous for its endless olive groves (more than 1 million trees), the harvested milk-white marble and the famous extra virgin olive oil. The **Museum of Olive Oil in Panaia** demonstrates how olive oil is extracted from antiquity, when heavy stones were used for this purpose, so to this day.

Wide from west to east less than twenty kilometers, and long from north to south almost twenty-five, Thassos has an area of about 385 sq.m. km and circles for less than 100 kilometers along a ring road offering numerous scenic views. In its northern part Thassos is covered with unexpectedly dense pine forests for a Greek island, with the dark green of the southern coniferous species overflowing in the saturated blue color of the sea. In the southern part of the island the vegetation is much poorer, and the slopes steeper and pebbly. Therefore, most nice, although small, sandy beaches are right there.

However, **there are some important** problems that "stop" the tourist product, taking into account, inter alia, the low attendance of the Archaeological Museum of Thassos, the lack of conference tourism, but also the limited presence of Thassos in international tourist platforms and forums.

In 2018, under the auspices and with the support of the shareholders of the tourist organization of Thassos, namely the Municipality of Thassos, the House of Kavala, the Association of Hoteliers of Thassos, etc. a tourist plan has been established to promote the island, based on the advantages of the island (beaches, alternative tourism, natural environment, attractions of archaeological interest, local architecture, safe road network, etc. - Thassos is the only island destination in northern Greece offering such diversity) and identifying the places where it "lags behind". The plan provides for broad cooperation between public administration and the private sector.

In 2019, strategic cooperation (one of the first similar in all of Greece) was launched between many authorities (The Association of Hoteliers of Kavala-Thassos, Greek Tourists and Marketing Chamber, etc.) for tourist general promotion of Kavala and Thassos under the name "Kavala and Thassos Tourism Partnership". With the sponsorship of all participating organizations and associations, there have also been a series of promotional actions – divided into two categories: the first is the travel of journalists from target countries, and the second refers to actions in a digital environment, content creation and, accordingly, promotion of markets that are relevant to destinations in Kavala and Thassos.

The targeted actions taken by both the local authority and the tourism business, and especially the cooperation between them to promote Thassos as a destination, aim to lead to the promotion of the region and the extension of the tourist season.

Measuring the number of visits

Profile to tourists and length of stay

Currently, Garmen Municipality is a destination mainly for spa/balneo tourism and **family holidays**. The number of cultural and historical and natural sites is increasing between 2017 and 2019.

Not only spa holidays are of interest to tourists, but also the combination of visits with other types of tourism aimed at natural and cultural and historical sites.

According to the age profile of the tourists who participated in Survey 1, the results show the following prioritization of the factors that were decisive in choosing the destination Garmen for their tourist visit:

- ✓ up to the age of 25:
 - cultural and historical attractions
 - natural environment/nature and local cuisine
- ✓ aged 26-35:
 - natural environment/nature
 - cultural and historical attractions and accommodation and infrastructure
 - hospitality and local identity
- ✓ aged 36 to 45:
 - natural environment/nature
 - accommodation and infrastructure
 - cultural and historical attractions
- ✓ aged 46 to 65:
 - cultural and historical attractions
 - natural environment/nature
- ✓ over 65: natural environment/nature

The studies carried out within the project show that nature and cultural and historical sights are what can attract tourists. They have a high potential for providing an important place for tourism in the local economy. The results show (Stage 1 of Activity 3 carried out at the beginning of the project) that more than **40% of** tourists who have visited the destination Garmen for the purpose of spa tourism also visit cultural and historical and **natural attractions** during their stay.

The main part of the visit tourists to Thassos is a holiday lasting more than 4 days due to the exclusive beaches of the Green Island. The length of the stay of tourists on Thassos:

- 52% 8-13 days
- 33% 4-7 days
- 8% 1 day
- 7% 2-3 days

Along with the sea and beaches, Thassos island has an extremely rich historical and natural heritage. About **30 % of tourists** who come to the island for a holiday visit **the cultural and historical attractions, natural attractions.**

The main objective of the current second stage of the surveys, part of Activity 3, is to measure the change in tourist flow **in 2019, compared to 2017** (base line) in the regions of Garmen and Thassos on the basis of which. To determine the impact of the implementation of project: B2.6c.09/28.09.2017 "Initiative to improve capacity and access to tourist destinations in the cross-border area", "Destinations for all".

Facilities

Garmen

In the period 2017 - 2019 in Garmen Municipality the accommodation base has been improved, not only has its capacity increased and there is already a 4-star hotel, in 2017 the highest category are 3-star hotels.

In 2019 there are 7 hotels, one of which is category 4*. There is an increase in the average capacity of the bed base of hotels and family hotels, indicating an improvement in the quality of accommodation services, leading to higher satisfaction of tourists and an increase in tourist flow.

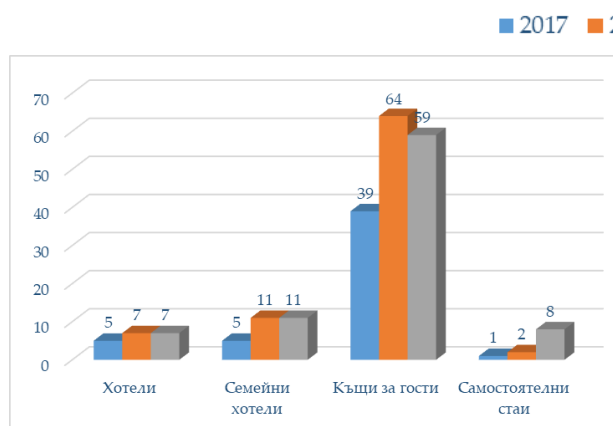


Figure 1 Properties

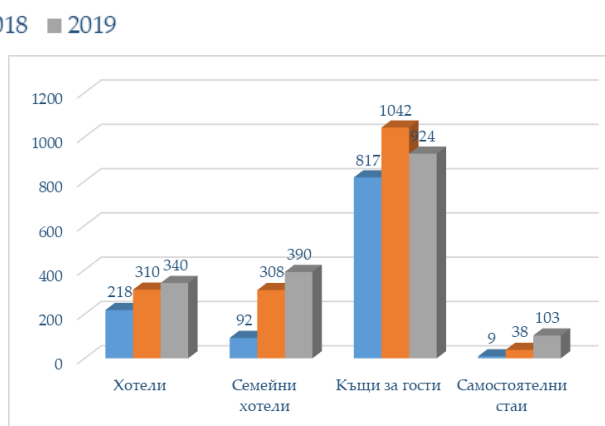


Figure 2 of beds

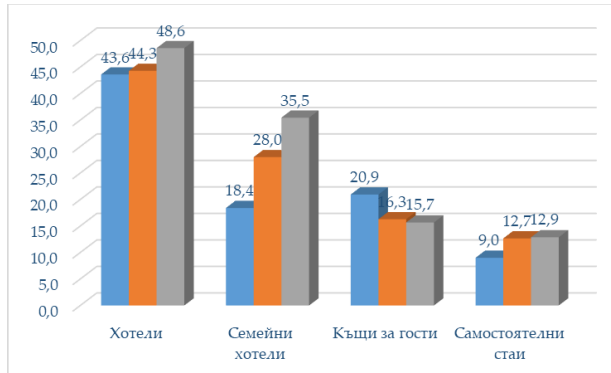


Figure 3 Average bed capacity

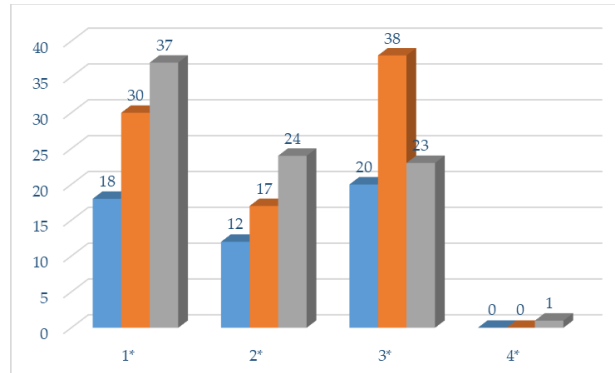


Figure 4 Structural by category

The bed base (number of beds) in Garmen Municipality increased by nearly 55% in 2019, this is a huge sign of the increase in tourist flow, as in 2017 there is a need to increase and improve the accommodation base, especially for spa tourism.

Thassos

Leal's base in a hotel and on the island of Thassos amounted to 10,500 beds in 2018, up from 10,313 in 2017. In addition, it is not possible to determine the exact number of bed facilities in private accommodation, but according to the official data they are at e 14 000 for 2018. There are also many low-capacity hotel units on the island, but also 15 complexes with 4 and 5 stars. About €150 million has been invested in new hotels and block renovations over the past decade. Thassos has become an international destination attracting many tourists from the Balkans, but also Poles, Hungarians, Britons, Germans, Russians and Scandinavians, as Kavala Airport Alexander the Great is now connected by direct flights to and from many European cities.

1. Tourist flows – Garmen and Thassos

Visits to supported sites under the Destination 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.

is calculated on the basis of official information on the number of nights spent and the visit of the main tourist sites in Garmen and Thassos. Through a mathematical model based on the percentage of the number of tourists who visited the destinations for the purpose of rest and made a visit to cultural and natural attractions, determined by the surveys carried out at Stage 1 at the beginning of the project.

The summary information at the beginning and end of the project for the regions of Garmen and Thassos is presented in the following tabulate, developed in accordance with the matrices– databases, part of methodology for carrying out a survey among the tourist flows (Sub-activity 3.1 of Contract No118/16.04.2018.):

Table 1 Tourist flow – supported sites, sources NSI and ELSTAT, Garmen Municipality and Thassos Municipality

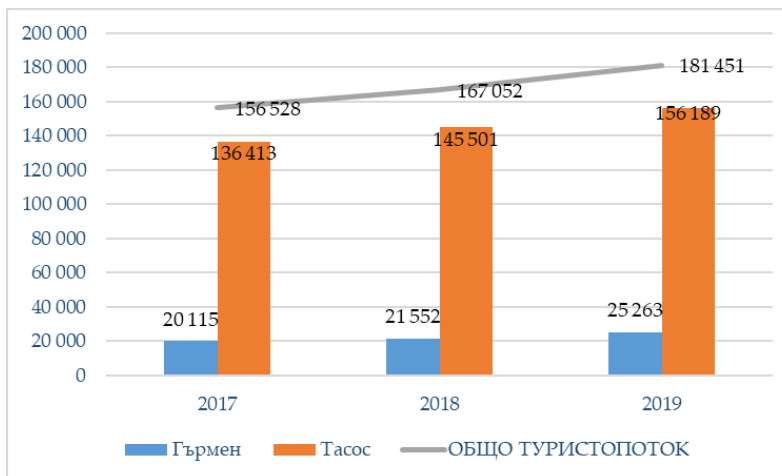
	Year	2017	2018	2019
		<i>*(for study I and II)</i>	<i>*(for study II)</i>	
Indicator				
Garmen	number of properties	50	85	85
Thassos		209	210	215
Garmen	number of beds in the accommodation	1 136	1 698	1 757
Thassos		10 313	10 500	10 850
Garmen	number of nights spent - total	93 626	99 640	121 107
Thassos		771 580	841 022	925 124
Garmen	number of overnight persons	34 421	36 632	44 524
Thassos		252 540	275 269	302 795
Garmen ³	Number of visits to major tourist sites	6 347	6 899	7 453
Thassos ⁴		60 651	62 920	65 350
Garmen	Relative share of overnight tourists visiting the supported sites with cultural or natural heritage and attractions	40,0%	40,0%	40,0%
Thassos		30,0%	30,0%	30,0%
Garmen	Number of tourists who visited the destinations for the main purpose spa/ summer holiday, also visited the projects supported by the project	13768	14653	17810
Thassos		75762	82581	90839
Garmen	TOURIST FLOWS - visits to the supported sites with cultural or natural heritage and attractions	20 115	21 552	25 263
Thassos		136 413	145 501	156 189
		TOTAL TOURIST FLOW	156 528	167 052
Garmen	Evaluation of the indicator		1436	3711
Thassos			9088	10688

³ Ancient Roman town of Nicopolis ad Bestum and Landscape and Historical Park "Gradishte"

⁴ Archaeological Museum, Museum of The Achtina, Shrines of Artemis and Dionysius, Ancient Theatre, Acropolis and Temple of Athens

Garmen	GENERAL ASSESSMENT OF THE INDICATOR	10 524	14 399
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The figures show an increase in visits to the project-backed cultural or natural heritage sites and landmarks by 10,524 tourists in 2018 compared to 2017 and by 14,399 tourists in 2019 compared to 2018:



The contribution of the project makes a significant contribution to the increased tourist flow. In 2018, tourists in the municipality of Garmen (visited the supported sites with cultural or natural heritage and attractions) have 1 436 more, compared to 2017 or the increase is by 7.14% – by 6.66%. Data for 2019 also show a significant increase in the indicator such as: In Garmen municipality, tourists are more by 2 711 compared to 2018, which is an increase of 17.22%.

This positive trend gives reason to believe that all targeted activities to improve access to the sites, development of promotional film, 3D digitization’s, promotional materials, info tours, etc., activities carried out within the project give an extremely good result. Attracting more tourists has a direct impact on the overall economic development of the territories.

II. Prognosis for tourist development in the region of Garmen Municipality and Thassos Municipality

1. Impact of COVID-19 on tourism and addressing the effects of the pandemic

One of the main economic activities that has mainly been affected by COVID-19 in the current year 2020 is tourism. This is equally valid for both Garmen and Thassos

destinations. There are no official statistics on the impact of COVID-19 on tourist flow for the whole 2020.

According to data from the Single Tourist Information System (ESTI) of Bulgaria, the overnight persons in Garmen municipality for the period from 01.06.2020 to 31.08.2020 was 14 455, at 30 049 for the same period of 2017, which is a decrease of nearly 50%.

According to data from hoteliers from the island, there has been a decrease in turnover of 70-80% in 2020, compared to 2019, hundreds of lost jobs in connection with the travel restrictions lasting more than three months. Financial support is needed for tourism businesses, especially small businesses, to address the effects of the COVID-19 pandemic.

Since the end of COVID-19 cannot be predicted globally, as well as its future impact on the development of tourism and tourist flow, this takes into account all activities and efforts aimed at the development of tourism in the municipalities of Garmen and Thassos and examines the change in tourist flows in scenarios without COVID-19.

2. Prediction, scenario without COVID-19

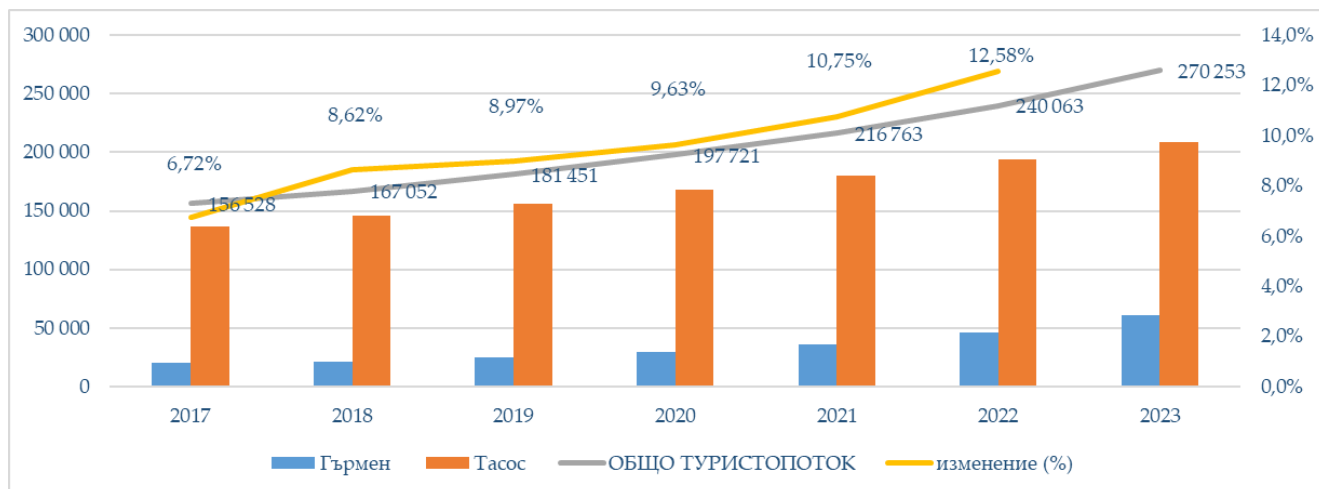
For the purposes of this study, building on improved tourist conditions, the In both Garmen and Thassos, in the field of planning, support of tourist sites, numerous promotional measures, including implemented within the framework of the project, the increased tourist flow in each of the years after the start of the project – 2018 and 2019, is a vein of the current forecast.

Data on the growth of tourist flow reported in 2018 and 2019, based on official sources, are taken as the main indicator of the forecast of tourist development by 2023. A mathematical method is used in which the function sought is replaced by a similar function, in this case the % of the range. Extrapolation is the only possible method for predicting the values of a time function for future moments of time.

The current forecast used the trend of increasing the indicator for our famous period (2017-2019) extending the time range until 2023. This excludes unpredictable events, such as the impact of COVID-19 on tourism and, accordingly, tourist flow. The extrapolation method gives good results when used to extend the graph of approximately linear function, or when the extension is not too far from the available data.

The following graph and table presents the data on the tourist forecast for the period up to 2023:

Figure 5 Forecast for tourist flows up to 2023 (non-COVID-19 scenario)



In the scenarios considered, the extrapolation of the data shows that the implementation of the project has the potential to contribute to an increase in tourist flows in the supported sites with an average of over 10,000 tourists per year in total for the two destinations of Garmen and Thassos.

Table 2 for the increase of tourists in Garmen municipality and Thassos municipality

	Year	2017	2017	2019	2020	2021	2022	2023
Garmen	TOURIST FLOWS - visits to the supported sites with cultural or natural heritage and attractions	20 115	21 552	25 263	29 986	36 476	46 044	61 117
Thassos		136 413	145 501	156 189	167 735	180 287	194 019	209 136
		TOTAL TOURIST FLOW	156 528	167 052	181 451	197 721	216 763	240 063
Garmen	amendment (number)		1436	3711	4 724	6 489	9 569	15 073
	change (%)		7,14%	17,22%	27,3%	37,4%	47,5%	57,5%
	Trend			10,1%	10,1%	10,1%	10,1%	10,1%
Thassos	amendment (number)		9088	10688	11 546	12 552	13 732	15 116
	change (%)		6,66%	7,35%	8,0%	8,7%	9,4%	10,1%
	Trend			0,7%	0,7%	0,7%	0,7%	0,7%
GENERAL ASSESSMENT OF THE INDICATOR	amendment (number)		10 524	14 399	16 270	19 042	23 300	30 189
	change (%)		6,7%	8,6%	9,0%	9,6%	10,7%	12,6%

As the tourism sector faces a serious crisis, all the forecast for tourism development are indicative. The development of tourism in the near future depends entirely on the extent to which the industry will cope with the economic consequences of the crisis caused by the covid-19 global pandemic.

Priority should also be given to tourism planning, together with measures to assist the sector in dealing with the effects:

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