

Tourist Well-Being and Health Emergencies

Greece scale





Analysis of Threats and Enabling Factors for Sustainable Tourism at Pilot Scale

Tourist well-being and health emergencies- Greece Scale



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OVERVIEW

The present document was produced in the framework of **Co-Evolve4BG** project “*Co-evolution of coastal human activities & Med natural systems for sustainable tourism & Blue Growth in the Mediterranean*” in relation to Threats and Enabling Factors for maritime and coastal tourism development on a national scale” Co-funded by ENI CBC Med Programme (Grant Agreement A_B.4.4_0075).

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REVIEW

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I. Greece in the world's leading tourist region

I.1. The Mediterranean basin: the world's leading tourism region

The wider Mediterranean (*i.e.*, including EU countries) region is the world's leading tourist destination. Tourism is mainly concentrated in the coastal areas, which receive approximately 30% of international tourist arrivals. The most widely used tourism development model applied to the region is based on seaside summer holidays and the attainment of quantitative goals. Of the total 46,000 km of coastline, 25,000 km is urbanised, and coastline urbanisation is estimated to have already exceeded a critical limit. Over 80% of tourists visiting the Mediterranean come from Europe, mostly from northern and western countries. Germany is the largest market, followed by the United Kingdom, France, and Italy, while Spain, France, Italy, and Greece receive almost 80% of Mediterranean tourism. The Mediterranean receives around a third of the total income of global tourism. Especially the EU Mediterranean countries tend to attract every year more than 300 million (out of 980 million worldwide) International Tourists Arrivals (ITAs), 30% of the global arrivals, and generating more than a quarter of international tourism receipts (190 out of 738 billion Euro worldwide). Prospects predict that ITAs will reach 500 million in 2030. Half of these arrivals are registered on the coasts of the Mediterranean countries. Tourism is the heavy industry for these countries and an important economic pillar, contributing significantly to the national GDP.

Within the wider Mediterranean region, the Mediterranean countries have, over the past two decades, recorded the highest growth rates of inbound world tourism. The economic performance of tourism in the region has been astonishing given the security risks, natural disasters, rising oil price and economic uncertainties in the region. The financial crisis of 2008-2009 had no major impact on this growth, which confirmed the resilience of tourism and the huge potential of the Mediterranean countries in this sector.

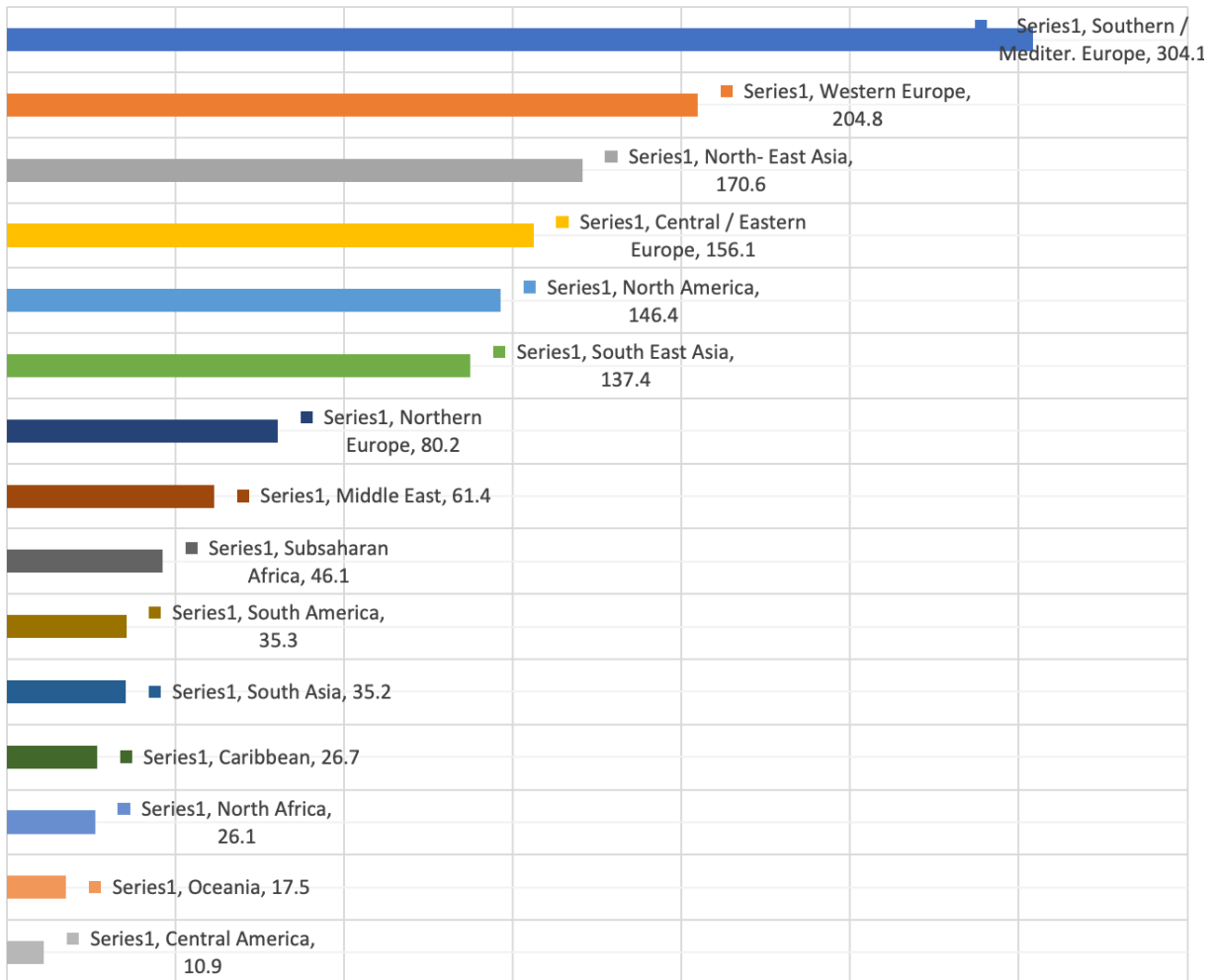


Figure 1. International tourist arrivals in millions per sub-region for 2019 (UNWTO, 2019)

I.2. Tourism in Greece

Tourism in Greece is a key element of the economic activity in the country and its most important sector. Greece has been a major tourist destination since the 1960s, known for its rich culture and history, which is reflected mainly by its 18 UNESCO World Heritage Sites, among the most in Europe and the world as well as for its long coastline and the Aegean and Ionian islands. This combination makes the country one of the most important destinations for International Tourism Arrivals in the Mediterranean basin.

Greece attracted as many as 31.3 million visitors (over 34 if we include cruise visitors) in 2019, up from 24 million in 2015, making Greece one of the most visited countries in Europe and the world, and contributing to approximately 25% to the nation's Gross Domestic Product. However, the pandemic has a terrible impact on tourism in Greece, as it can be shown in Figure 2.

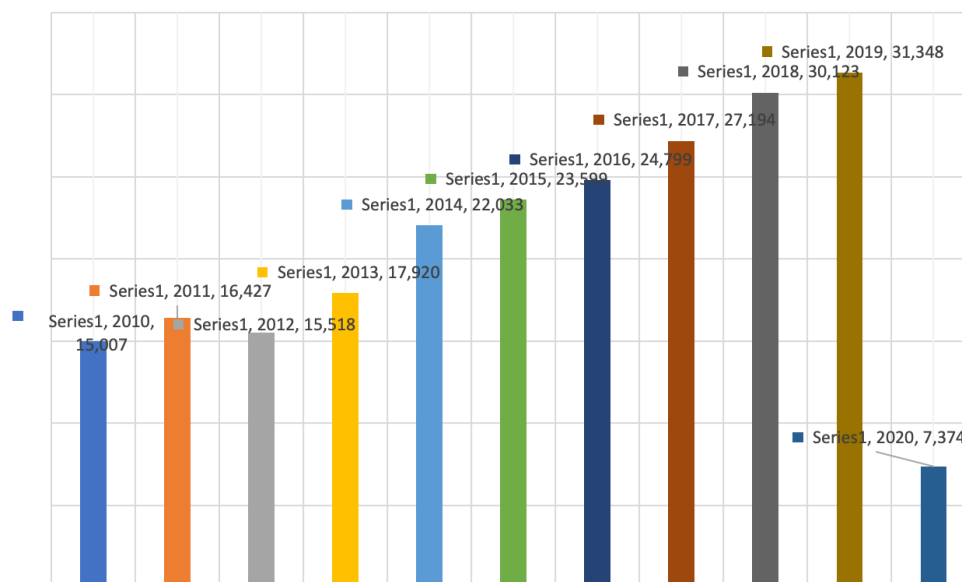


Figure 2. Number of arrivals in Greece 2006-2019 www.statista.com

In recent years, Greece has made significant investments in the tourism industry, focused on transforming the traditional “sun & beach” tourist product into several more targeted and higher value products, more focused products, centred on:

- **Thematic sun & beach tourism**, where specific “themes” such as wellness, romance or luxury are used to add value and to extend the typical sun & beach holidays.
- **Nautical tourism**, both in terms of attracting a larger amount of cruise liners and in terms of extending the offering for yachting/ sailing holidays.
- **City break tourism**, focused mainly around the two main cities of Athens and Thessaloniki.
- **Cultural and religious tourism**, upgrading and leveraging the several historical, heritage and religious monuments and museums of Greece.
- **Medical tourism**, which presents an exciting growth opportunity, through leveraging the skilled Greek medical personnel combined with investments in existing facilities and infrastructure.
- **Meetings and Incentives (MICE)** tourism positioning Greece as a major meeting and conference centre for regional associations and companies.
- **Sports tourism**, as tourism experience is increasingly associated with athletic activities, either directly or indirectly. This form of tourism has also proven helpful

in terms of developing existing or new tourism destinations, attracting HNWI and eliminating seasonality.

- **Integrated resorts – holiday housing** new developments in existing and new tourism destinations taking advantage of the existing legislation for the development of integrated resorts and for the acquisition of residence allowance by non-EU citizens who invest in real estate.

Tourism accounted for 6.8% of total GVA in 2017. This sector directly employed 381,800 people in 2018, accounting for 10.0% of total employment in the country. Tourism is an export champion in the Greek economy. Travel exports accounted for 43.3% of total service exports in 2018.

In 2018, inbound tourism to Greece was all the time high with a record 33.1 million international tourist arrivals, an increase of 9.7% over 2017. Tourists from other EU countries accounted for almost two-thirds of total visits, an increase of 15.1% over the previous year. The volume markets of Germany (+18.2%) and France (+7.3%) grew significantly, recording a total of 4.4 million and 1.5 million visits respectively, as did arrivals from the United States which reached 1.1 million visits, representing an annual increase of 26.9%. Nights in all means of accommodation rose by 8.1% compared with 2017, to reach 230.7 million.

Domestic tourists made 5.7 million trips in 2018, up 3.6% over 2017. Only 4.7% of domestic trips were for business purposes in 2017, with the vast majority being leisure orientated. Most domestic visitors stayed with friends or relatives or in other non-rented accommodation, with only 34.2% of visits using paid accommodation.

The total contribution of travel and tourism to GDP in Greece decreased remarkably in 2020 over the previous year, due to the corona virus (COVID-19) pandemic. Overall, the total contribution of these industries to the gross domestic product in Greece amounted to 14.8 billion Euros in 2020; whereas it peaked at 38.1 billion Euros in 2019.

Overall, Germany was ranked as the leading tourist market for Greece with approximately 1.5 million tourists visiting the country in 2020. However, roughly four million German tourists travelled to Greece in 2019. The UK, France and Italy were other leading inbound travel markets in both 2019 and 2020. Moreover, USA and Russia rank in places 5 and 6 respectively in top markets for Greek tourism.

Table 1. Top six markets for Greek tourism. International Tourist Arrivals in Greece for the years 2010-2020 in thousands of arrivals

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Germany	2,039	2,240	2,109	2,268	2,459	2,810	3,139	3,706	4,381	4,026	1,526
UK	1,802	1,758	1,921	1,846	2,090	2,397	2,895	3,002	2,943	3,499	1,069
Italy	844	938	848	964	1,118	1,355	1,387	1,441	1,667	1,553	373
France	868	1,149	977	1,152	1,463	1,522	1,314	1,420	1,524	1,542	469
USA	498	485	374	467	592	750	779	865	1,097	1,179	107
Russia	451	739	875	1,353	1,250	513	595	589	520	583	26

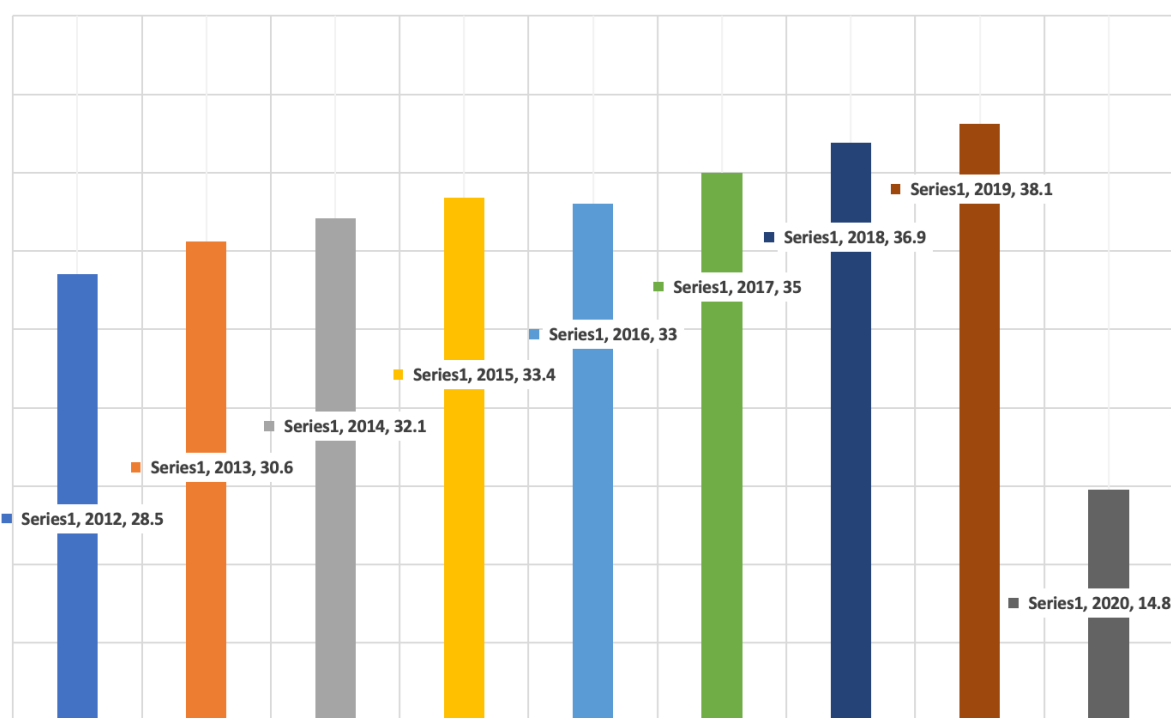


Figure 3. Total contribution of travel and tourism to GDP in Greece from 2012 to 2020 (Statista.com)

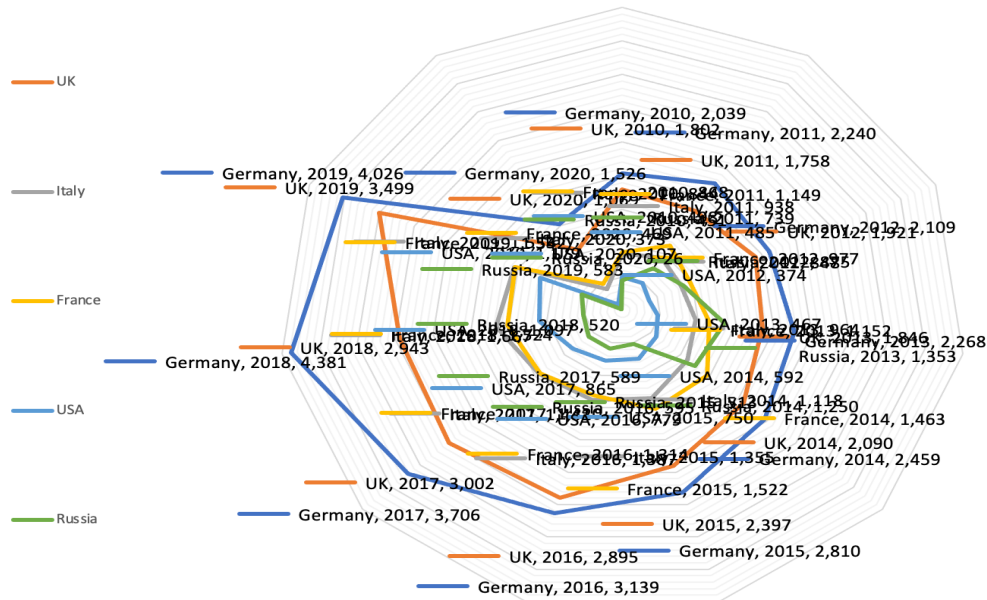


Figure 4. Top six markets for Greek tourism. International Tourist Arrivals in Greece for the years 2010-2020 in thousands of arrivals

I.3. Tourism policies and programs

The National Strategic Reference Framework for the Tourism Sector guides the sector's development for the period 2014-20. Greece tourism strategy aims at promoting the country as a global and attractive year-round destination, offering unique and authentic travel experiences. Tourism is at the heart of the Government policy for national development, innovation, and openness. The main priorities for national tourism policy are to improve the competitiveness, quality, authenticity, resilience, and sustainability of the tourism product, and to boost investment in high quality accommodation and other tourism developments with a low environmental footprint. The five axes of the National Tourism Strategic Plan are as follows: (1) High standards of infrastructure, with improvements to the licensing regime in order to attract high-quality investments, eliminate red tape and optimize the spatial distribution of tourism, (2) Respect for sustainability principles, (3) Improved accessibility and connectivity, by enhancing the country's aviation route network and by expanding and upgrading the national network of marinas, (4) Better management of the tourism experience, to increase quality and attractiveness via a focus on sustainable destination management and tourism education, (5) Redesigning of the tourism product, and redefinition of the brand and communications to reflect the focus on quality, authenticity, resilience, sustainability and value for money.

Within this framework, the Ministry of Tourism is implementing a policy to diversify the tourism product, upgrade tourism infrastructure and incorporate the tourism sector in

the local economy. These actions aim at creating high quality jobs, increasing visitor expenditure, dispersing demand, protecting, and improving natural and cultural resources, as well as creating positive spill-over effects into the wider national economy.

To improve connectivity throughout the country, Greece has prioritized interventions that facilitate access by visitors to remote areas on both land and water (roads, motorways, and ports). Investments are also progressing with several regional airports.¹

A key challenge for the tourism sector in Greece is congestion caused by excessive volumes of tourists, especially during the high summer season. New legislation related to the development of thematic products creates the institutional framework to enable product differentiation, with the ultimate strategic goal of reducing acute seasonality. Working closely alongside major tour operators, the plan aims at highlighting emerging destinations and attracting visitors to experience lesser-known places and assets during the shoulder months. The new legislation recognizes sea, spa, sports, rural, religious, meetings incentives conferences and events (MICE), and health tourism as key growth opportunities. Recent legislation has also helped modernize the operation of the tourism value chain - by supporting entrepreneurship and improving skills to capitalize new markets that demand authentic and sustainable experiences.

The Greek National Tourism Organisation's Tourism Marketing Plan 2019-20 distinguishes the competitive advantages of each of the 13 regions and proposes a range of dynamic packages combining well known destinations with new emerging destinations, offering travellers a variety of choices throughout the year. The Marketing Plan shows cases of the hidden attractions of each region, raises the awareness of both domestic and inbound visitors to result in the dispersal of tourism demand throughout the year. Furthermore, the Ministry of Tourism has worked closely with the European Bank for Reconstruction and Development to roll out management plans to promote sustainable tourism in two of the country's most popular holiday islands: Rhodes and Santorini. The plans aim at helping the islands' businesses and local communities to ensure that the destinations are developed, managed, and promoted in a sustainable, inclusive and integrated way, with a clear focus on residents. In addition, a training guide will lay the foundations for extending relevant practices across the country.

Embracing digital transformation is a further key priority, and planned development will create a digital ecosystem for Greek tourism, using four strategic pillars: digital transformation of services to citizens and enterprises; digital upgrading of tourism education; an integrated system of online data collection and processing; and the utilization of new technologies in tourism promotion.

¹ In particular, five airports will be completed by the end of 2019 under an agreement with German investment partner Fraport, while the whole program of airport upgrades is expected to be concluded at the end of 2021. Improved access along with the promotion of lesser known destinations is expected to spread the benefits of tourism to many other parts of the territory.

I.4. Infrastructures, tourism capacity and investments

Four Seasons has opened its first hotel in Athens
TEMES SA, invest €250 mil. in the creation of a second resort at Navarino Bay

- Wyndham Hotel Group, opens new Hotels in Athens and key resort destinations
- Russian Mirum is implementing "Elounda Hills" in Crete
- Dmitry Rybolovlev started a €120M Project, in a luxury accommodation complex on the Island of Skorpios
- TUI Group invested in Greece for the ROBINSON and Family Life Hotel brand
- Cronwell built a 300-room luxury-resort next to Mount Athos

Greece has been placed 18th in the world in tourist infrastructure among 141 countries, according to the 2017 Travel and Tourism Competitiveness Index. This strong tourism capacity has been improved thanks to significant investments and can be further analysed in 9,971 hotels, 454,973 rooms and 856,347 beds for the year 2019. Over the past five years, the country's hotel potential has improved significantly: 5-star hotels have increased their share of total hotel capacity from 1% in 2000 to 5.1% in 2017; 4-star hotels have a 15% share in total hotel capacity, and 3-star hotels a 25% (2017).

Greece has an important network of supportive infrastructures for tourism like airports, ports, marinas. More specifically the country has 45 airports, including 15 international airports. Many of these airports, especially on the islands, primarily serve tourists and handle

charter flights. In 2001, the Athens International Airport opened and is considered as one of the best airports in Europe.

With hundreds of islands, Greece has many seaports, 16 of which are international. The port of Piraeus is one of the busiest in Europe and is the main cargo port of the country, followed by the ports of Thessaloniki, Patras, and Igoumenitsa. Greece has more than 140 ports that serve passengers and cargo. For the year 2018, 43 Greek ports received 3,410 cruise ships and 4.8 million tourists. Across the country and in the islands, 21 high quality marinas with 8,100 berths, and many more docks and moorings could be found. Moreover, the country moved on with a very ambitious programme of tourism related infrastructure upgrade in cooperation with the private sector. Important aspects of this upgrade include: (1) Privatization of 14 regional airports to a German-Greek consortium. A total of €330 million have been invested in airport infrastructure until 2020, (2) Privatization of the Greek Railway

Greece's Roadmap after 2021

- 35 million arrivals
- 20 billion euros In tourist receipts
- 43 billion euros GDP contribution
- 1 million jobs related to tourism
- 105.000 new 5* beds through new developments or upgrades

operator to Italian Rail Operator - Ferrovie Dello Stato Italiane, (3) New water ways are under construction for the interconnection of the islands with each other, but also with the mainland.

The conditions required to achieve the above objectives are the investment of 6 billion Euros for the next 3 to 5 years from the public and private sectors.

II. Protected Tourist Well-Being

II.1. Favourable characteristics for tourist well-being

Most assessments of tourist satisfaction within a particular destination are based on multiple attributes, including service quality, security, safety, price, infrastructure, and so on. They do not necessarily refer to a particular service sector within the wider tourism industry, and therefore the managerial implications for service providers and destination management organisations are not always clear.

Greece, located at the East of the Mediterranean basin, is geographically easily accessible from European, African, and Asian markets. Consequently, the inconveniences to tourists' well-being caused by long journeys, occurs only very rarely because most cities in Europe and the Middle East are within a three-hour flight or less from Athens. Greece has a typical Mediterranean climate, which lends itself to mild and often wet winters and dry summers. The country is mostly sunny throughout the year. The northern part of the country can be very cold during the winter and even have snow in some areas. Winter is milder than the south. July and August are the busiest months; but they also have the most frequent transit schedules to more remote Greek islands and perfect weather for outdoor adventures and day trips.

With more than 16,000 km of coastline, more than 6,000 islands and islets, and a well-established tourism industry, Greece presents a very attractive destination for leisure and well-being. The country is one of the top global tourism destinations for sun and beach holidays and provides attractive propositions throughout the round themed holidays. The competitive advantages of Greece, such as rich cultural heritage, natural beauty, and geographical variety, have attracted significant tourism investments in recent years, thus further strengthening Greece image as an ideal destination both for holidays and tourism-related investments. Moreover, the offered safety and security feeling to the visitors, improve the county's image and tourism product.

Tourism industry is currently undergoing a major strategic improvement initiative, focusing on the expansion of the touristic period, the attraction of higher-value tourist segments, the increase of daily average spending and the opening of new tourist markets (Eichenbaum *et al.* 2020).

Over the next years, Greece will be poised to make significant investments in tourism industry, focused on transforming the traditional "sun & beach" tourist product into several higher-value, more focused products and centred around as described below.



Figure 5. Investments in tourism industry

II.2. Towards a generalization of travel medicine

Travelling can increase risks to personal health and well-being. Understanding these possible threats is essential when planning travel, particularly to unfamiliar, distant, or remote areas. Taking appropriate precautions before beginning a trip can mitigate risks and ensure a response plan in case you are injured, or you suffer from another health problem when away from home. Travelling and moving has been the pathway for disseminating infectious diseases throughout recorded history and will continue to shape the emergence, frequency, and spread of infections in geographic areas and populations.

To confront these issues that are implicated with travel, during the past four decades, a new medical specialization has been implemented to understand, record, and implement diagnosis and treatment of diseases and health issues related to travel and tourism and travel medicine (Fan *et al.* 2016).

Although infectious, communicable, and tropical diseases are the majority of health issues that travellers are confronted with when visiting exotic or remote areas. This medical specialization deals with several risks and problems that can lead us to travel and vacation consequences like accidents, sunburn, health problems related to high altitudes *etc.* Moreover, it provides epidemiology data for tropical infectious disease and non-communicable disease or health risk factors as well (*e.g.*, traffic accidents, climate problems like hurricanes), and preventive and safety measures that travellers and tourists could take.

Travel medicine is a rapidly evolving, highly dynamic, multidisciplinary medical specialty that requires expertise on various travel-related illnesses, as well as up-to-date knowledge on the global epidemiology of infectious and non-infectious health risks, health regulations, immunization requirements and focuses on pre-travel preventive care. A comprehensive risk assessment for each individual traveller is essential to accurately assess the traveller's itinerary and destination-specific risks, and to provide guidance on the most appropriate risk management interventions to promote health and safety, prevent adverse health effects during travel.

III. Tourism and Health risks: Effects of Covid-19

III.1. An unprecedented pandemic

The world is facing an unprecedented global health, social and economic emergency because of the COVID-19 pandemic. Travel and tourism are among the most affected sectors with a massive fall of international demand amid global travel restrictions, including many borders fully closed, to contain the virus. According to the latest issue of the UNWTO World Tourism Barometer, International tourist arrivals (overnight visitors) fell by 72% between January and October 2020 over the same period last year, curbed by slow virus containment, low traveller confidence and important restrictions on travel still in place, due to the COVID-19 pandemic. The drop, in the first ten months of the year, represents 900 million fewer international tourist arrivals compared to the same period in 2019 and reflects the loss of US\$ 935 billion in international tourism export earnings from 10 times more than the loss in 2009, under the effects of the global economic crisis.

The corona virus pandemic first emerged in Greece on February 26, 2020. Following the confirmation of the first three cases in Greece on February 27 all festivals in the country were initially cancelled, and as of March 10 a total of 89 cases had been confirmed in the country, mostly involving people who had travelled to Italy and a group of pilgrims who had travelled to Israel and Egypt, as well as their close contacts. Health and State Authorities issued precautionary guidelines and recommendations, while measures up to that point were taken locally, including the closure of schools and the suspension of cultural events in the affected areas (particularly Iliia, Achaea, and Zakynthos). However, on March 10, 2021, due to the outbreak of the virus in different parts of the country and the failure of many to comply with the restrictive measures, the government decided to gradually enact universal response measures.

The Greek government decided to ban all non-essential transport across the country and all air traffic, while closing its borders with Albania and North Macedonia, permitting only the transportation of goods and the entry of Greek nationals and residents. The suspension of ferry services to and from Italy, air connections to Spain, as well as the banning of all cruise ships and sailboats docking in Greek ports were also taken. All visitors were tested upon arrival and were required to stay overnight at a designated hotel. If the test was negative, passengers were subjected to 7- day self-isolation. In the event of a positive result, passengers would be isolated under supervision for 14 days. The list of countries was established based on their epidemiological profile and took into account the announcements made by the European Aviation Safety Agency (EASA) and the relevant recommendations of the Infectious Diseases Committee.²

2

GROUP A: Austria, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Germany, Hungary, Iceland, Ireland, Latvia, Lichtenstein, Lithuania, Luxemburg, Malta, Norway, Poland, Romania, Slovakia, Slovenia, Switzerland. GROUP B: Albania, Belgium, France, Italy, North Macedonia, Netherlands, Portugal, Spain, Sweden, other non-EU countries.

Greece has shown remarkable resilience in the face of the pandemic. Contrary to the general negative climate which followed the appearance of the virus, the country showed rapid reflexes in terms of managing the health crisis. The digitalisation of critical public administrative operations was accelerated, enhancing the state's modernisation process, and creating the base for next day. At the same time, a significant part of Greek businesses, despite their digital deficit, successfully adapted techniques to confront the pandemic, such as the remote work model and other necessary digital solutions, such as e-commerce.

Although in the first wave of the pandemic they did not have a serious effect, in terms of cases and deaths, the second wave, which began in October and the third in January, led to a significant increase in the total number of illnesses and deaths.

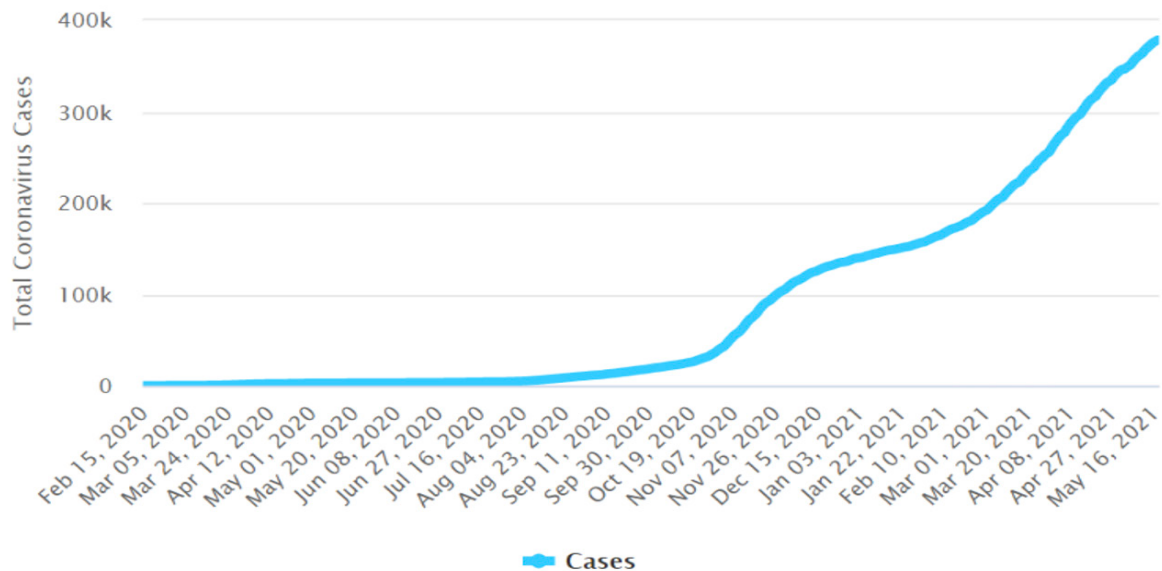


Figure 6. Daily new cases in Greece from Feb 2020 until 16 May 2021

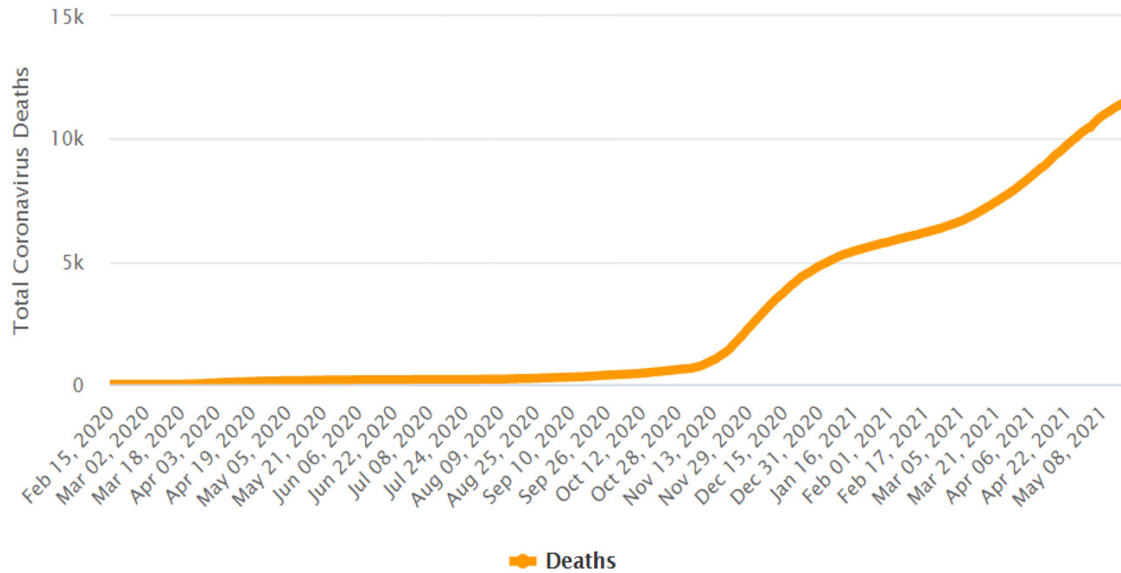


Figure 7. Total number of deaths in Greece from Feb 2012 until 8 May 2021

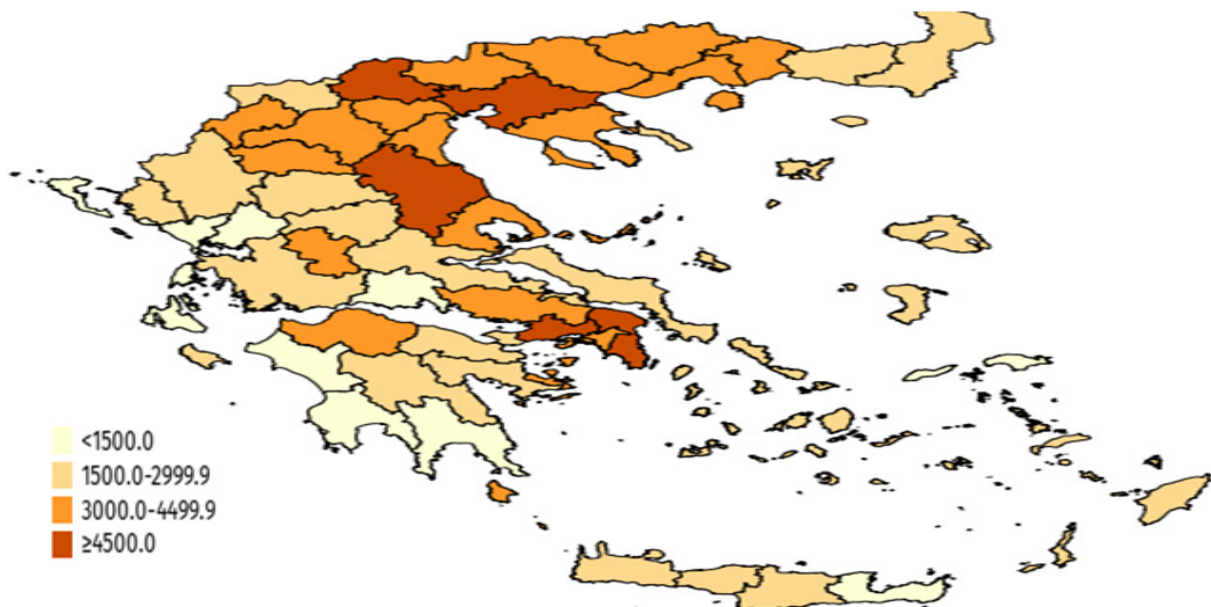


Figure 8. Map of the cumulative impact of confirmed cases of COVID-19, from February 20, 2020, to May 18, 2021

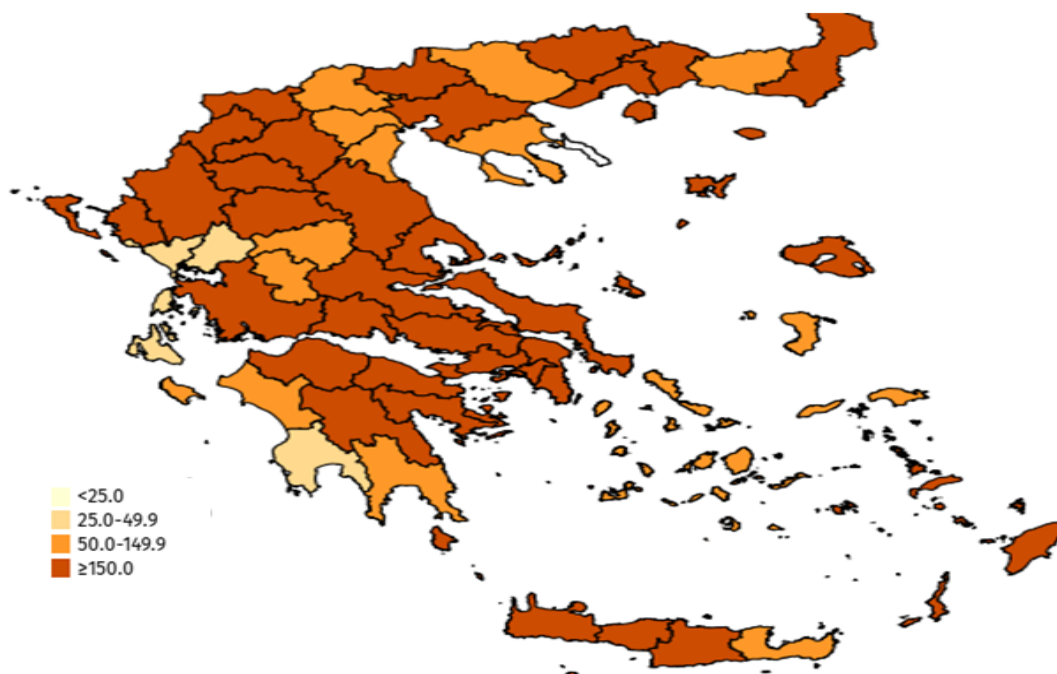


Figure 9. Map of the impacts of the last fourteen days of confirmed cases of COVID-19, May 18, 2021

III.2. Proven risks for international tourists

The risks to the safety of tourists are extremely significant. For this reason, all governments have attempted to take extra precautions in the name of the tourist safety (Correia *et al.* 1918). Furthermore, the fear may affect tourist intention to visit some countries. Since the vaccinations are a reality across the world, touristic movements are expected to increase again.

However, due to the duration and magnitude of the tourism downturn in 2020 and 2021, which depends on a number of factors that are impossible to quantify at this stage: mainly when the pandemic is medically addressed point of view (treatment and / or vaccine) to a sufficient degree so that citizens around the world feel safe to travel again. Then from:

- the availability of citizens in the market of our countries to travel and their disposable income, but also the possibilities to take summer leave from the organizations / companies they work with or – to temporarily close their operations for the self-employed,
- the lifting of travel restrictions both to outbound tourism from our countries' markets and to incoming tourism in Greece,
- any bankruptcies that have in the meantime occurred in the travel experience

production chain (airline companies, tour operators, hotels, *etc.*),

- the restoration of air connections,
- the image that each country will have created of the way in which it has coped with the pandemic and its image of comparison with the main competing destinations, particularly in terms of the security felt by tourists.

The Greek government, as all other governments across the world, applied some precautionary measures to reassure the safety of both tourists and indigenous populations. Such measures were *inter alia*: (1) flight and docking restrictions, (2) test upon arrival to all visitors, (3) all foreigners seeking to enter the country must first present negative results of a PCR test, administered no more than 72 hours prior to the scheduled departure, (3) mandatory 3-day precautionary quarantine, (4) disinfection measures to all accommodation and food companies.

During the last months, those restrictions are loosened or completely eradicated, since the vaccination program is in process. The vaccination programme is currently on schedule with over 100,000 citizens being vaccinated every day. State officials believe that by the end of August over 65% of the total population will be vaccinated. By the 18th of May 16% of the total population would have been fully vaccinated and 30.5% would have received at least one dose of vaccine. Especially for the Greek islands and to boost tourism and international arrivals, the Ministry of Health has planned a separate vaccination programme. In 31 Greek islands with less than 3,500 inhabitants, almost the entire population has been vaccinated since April 2020. For more populated islands with population over 3,500, the vaccination program is scheduled to end in late June, providing herd immunity for the local population and safety for the visitors. Vaccinations and other health safety measures that the Greek Government has implemented since the 15th of May should increase the international interest of visitors and tourists. The Greek Ministry of tourism expects that for 2021, the number of international arrivals will be close to that of 2019.

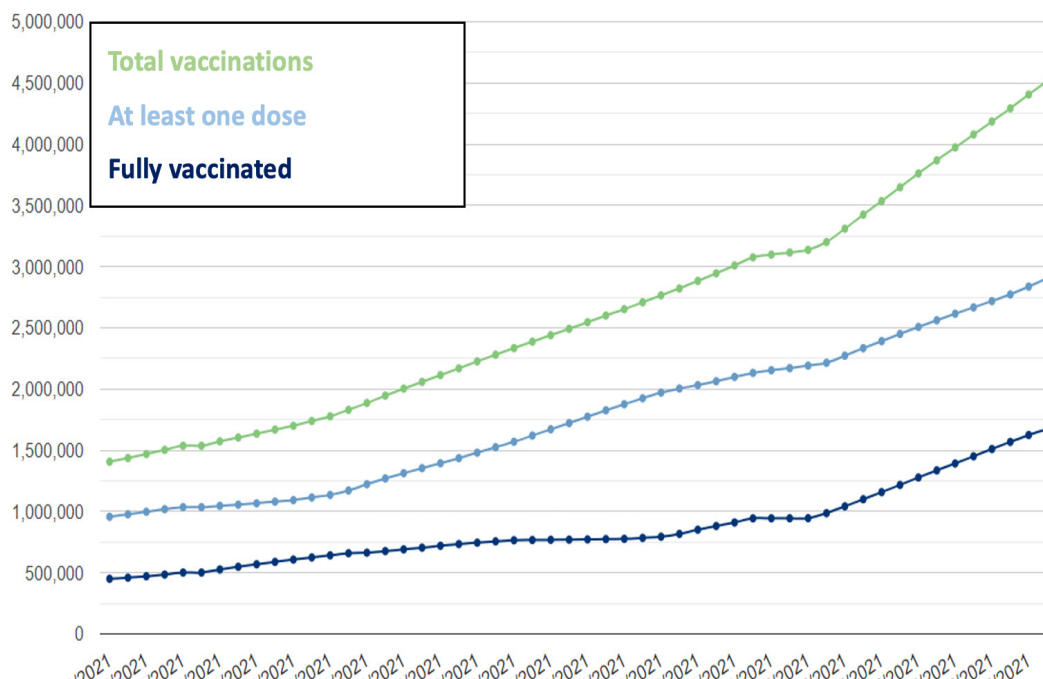


Figure 10. Evolution of Vaccinations against Covid-19 in Greece

As Greece prepares to start opening up to tourism again, there are still a number of measures in place for international visitors and local residents to restrict the spread of Covid-19. The government plan to deal with the disease is assessed and updated based on the daily epidemiological data. Travellers are expected to fill in the Passenger Locator Form (PLF – GDPR compliant) one day before they enter the country, providing information on their point of departure, the duration of previous stays in other countries, and the address of their stay in Greece. The PLF must also be filled in – one day before departure - by Greek residents who plan to travel abroad. Moreover, they must be fully vaccinated or present a valid negative Corona Virus RT-PCR test 72 hours prior to their arrival. For certain passengers according to their travel history Covid-19 antigen tests will be performed upon their arrival at the entry point (airports, border passages).

IV. General containment and its consequences

Covid-19 pandemics have long-term consequences that go beyond their direct impact on public health, including epidemic deaths and increased morbidity / mortality due to chronic disease under-treatment (OCHA, 2020). The indirect long-term effects of epidemics include social (phenomena of social exclusion and guilt of vulnerable populations (Alcayna-Stevens, 2018; Ripoll and Wilkinson, 2019), school closures, increased domestic violence, *etc.* (Calnan *et al.* 2018; De La Fuente *et al.* 2019; Kelly, 2020; Lamoure and Juillard, 2020; Ripoll and Wilkinson, 2019), economic (reduced income, increased unemployment, reduced tax revenue, reduced investment, reduction of travel and trade, increase of public debt, decrease of consumption (Brahmbhatt and Dutta, 2008; De La Fuente *et al.* 2019) and political (destabilization of governments, intensity of authoritarianism, opacity in the management of the pandemic crisis (Menzel, 2017). In addition, the indirect effects are underestimated even though in many cases, the impact may be the same or even greater. Important from the epidemic *per se* (Calnan *et al.* 2018). The World Bank estimated the financial losses from six major zoonotic pandemics between 1997 and 2009 at least \$ 80 billion. USD (World Bank, 2012). The economic consequences due to the deterioration of the socio-economic situation of citizens, can further increase the morbidity and mortality of the population after the pandemic, creating spiral effects on health, productivity and ultimately the economy of a country (Madhav *et al.* 2018).

The effects of epidemics are also determined by the policies adopted to address both their health and economic dimensions. These policies are particularly affected by the initial state of the health system (*i.e.* its ability to cope with the epidemic) (Paraskevopoulou and Mavroudeas, 2021).

The economic impact of pandemics is affected by (i) epidemic preparedness and prevention (risk mitigation practices, social distance, *etc.*), (ii) the duration of the event (*e.g.*, continued business activity, trade ban) and travel, avoidance of public service) and (iii) the aftermath. Pandemics have different effects, since they have different mechanisms of transmission, latency and mortality rates and extending to a wide range of sectors affecting both the economy and social formation (Gatiso *et al.* 2018; Paraskevopoulou and Mavroudeas, 2021).

The sectors directly affected by the pandemics are agriculture and livestock, trade, tourism, transport, and international production chains. The impact, on the primary sector, is often underestimated (*e.g.*, the Rift Valley fever epidemic in Somalia in 2,000 led to the collapse of the agricultural and livestock sector, a 75% loss in exports and a 36% drop in GDP (Annette *et al.* 2014; Peyre *et al.* 2015).

Respectively, pandemics mainly affect tourism, wholesale / retail trade and catering sectors due to the general slowdown in production related to the reduction in demand. Also, (restaurants, hotels, leisure centers, *etc.*) have particularly strong negative effects on employment, since they are characterized by a high casual workforce (Paraskevopoulou and Mavroudeas, 2021)

It has also been observed that social inequalities are intensifying with extremely negative effects on the distribution of income. This is actually difficult to reduce after the end of the epidemic (Bloom *et al.* 2018; Bloom and Canning, 2004). This worsening of social inequalities is exacerbated by pre-existing neoconservative policies that have led to the weakening of public health systems through austerity and privatization policies (Alcayna-Stevens, 2018; Brahmabhatt and Dutta, 2008; Delivorias and Scholz, 2020; Kelly, 2020; Nunes, 2020; Rohwerder, 2020). The health crisis is expressed differently in economies in terms of its intensity. The countries of the European periphery are traditionally associated with tourism and services.

V. Tourism: a damaged sector and measures taken

V.1. Declining Indicators

According to the latest figures from the World Tourism Organization (UNWTO), 2020 was the worst year for global tourism, with international arrivals down -74% compared to 2019. Destinations received 1.1 billion worldwide fewer international arrivals in 2020 compared to the previous year, due to unprecedented decline in demand and extensive travel restrictions.

Typically, in 2019, international travel arrivals stood at 1.5 billion, while in 2020 they were only 381 million. According to the latest barometer of world tourism, the collapse of international travel corresponds to an estimated loss of 1.3 trillion dollars in export earnings, more than 11 times the loss recorded during the global financial crisis of 2009. The crisis has endangered between 100 and 120 million direct tourism jobs, in small and medium-sized enterprises.

In Europe a decrease by 70%, has been recorded, with 221 million arrivals compared to 746 million in 2019. In Greece a significant decrease by 76.5% has been recorded with only 7.4 million arrivals compared to 31.3 million in 2019.

Due to the evolving nature of the pandemic, many countries are still reintroducing stricter travel restrictions, including mandatory tests, quarantines and in some cases complete closure of borders, slowdown in the recovery of international travel and recovery in tourism.

The measures taken globally to tackle the covid-19 pandemic have, unfortunately, continued to have social and economic implications for all areas of activity. As expected, these measures also affected the cruise industry worldwide. A sector, in which, Greece has shown significant performance in all previous years; and has a promising future. Cruise statistics recorded for 2020 in 43 registered destinations in Greece show a significant decrease, amounting to 204 cruise ship arrivals (compared to 3,899 arrivals in 2019) and 66,874 visitor arrivals (compared to 5,537,500 arrivals in 2019).

In the port of Piraeus in 2020 arrived 76 cruise ships with 16,640 passengers compared to 622 cruise ships with 1,098,091 passengers for 2019, falling for the first time to second place under the port of Heraklion. In the port of Heraklion in 2020, 24 cruise ships with 19 998 passengers arrived compared to 204 cruise ships with 307,043 passengers for 2019 and was found in first class. In the other ports, the passengers did not exceed 10,000; while the reduction of passengers in many cases amounted to 100%.

More specifically

(1) Corfu: 10,448 passenger arrivals and 13 cruise ships from 767 thousand arrivals 420 cruise ships for 2019,

(2) Rhodes: 8,334 passenger arrivals and 14 cruise ships from 308 thousand arrivals and 258 cruise ships for 2019,

(3) Katakolo: 7,589 passenger arrivals and 10 cruise ships from 413 thousand arrivals and 199 cruise ships for 2019,

(4) Mykonos: 914 passenger arrivals and 17 cruise ships from 787 thousand arrivals and 550 cruise ships for 2019,

(5) in the port of Santorini in 2020 arrived only 3 cruise ships with 131 passengers compared to 592 cruise ships in 2019 with 980 771 passengers.

In 2020, travel receipts decreased by -76.5% compared to 2019 and amounted to € 4.28 billion. This is due to the decrease in revenues from residents of EU-27 countries by -70.8%, which amounted to € 2.84 billion, as well as receipts from residents of non-EU-27 countries by -82.0%, amounting to € 1.43 billion.

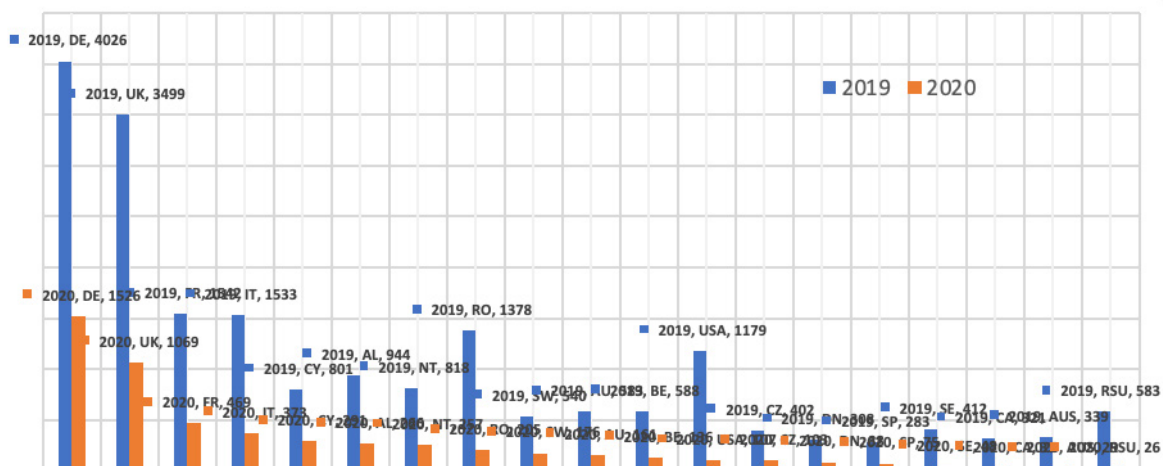


Figure 11. Leading inbound travel markets for Greece in 2019 and 2020, by number of arrivals, in thousands

More specifically, receipts from residents of euro zone countries amounted to €2.39 billion, down by 69.1%; while receipts from residents of EU-27 countries outside the euro area decreased by -77.5% to €451 million. Receipts from Germany, in particular, decreased by -61.6% to €1.14 billion, while receipts from France decreased by -66.3% to €367 million.

The Greek government has put in place a set of decisive, yet effective measures that will help hotel businesses stay afloat. The biggest question mark next to hoteliers' concerns is whether they will be able to finance their working capital. Amongst the most recent announcements, the government has entered upon a new employment subsidy program called 'Syn-ergasia' funded by EU's SURE scheme, an emergency support plan worth up to €100 billion. This initiative will ensure that employees who

work reduced hours receive normal salary levels, while their social security benefits will also be covered.

Furthermore, Greece Prime Minister announced a set of measures working as a safety net for tourism businesses. These revolve around regulations for repayable advances to relieve businesses, reduction of advance income tax payments, a framework supporting reduced lease payments by 40% until August, and the granting of working capital loans under state guarantee and at low interest rates through the ‘Entrepreneurship Fund II-TEPIX II’ in combination with the Guarantee Fund and the Development Bank.

To encourage Greeks to travel, the Tourism Ministry will strengthen the social tourism holiday program by the Greek Manpower Employment Organization (OAED). Furthermore, advertising campaigns along with a second Greek social tourism holiday program called “Tourism for All” will be launched and financed with €30 million to equip holidaymakers with e-vouchers of €120 for a minimum of 4-night stay at Greek hotels. Finally, private sector employees will benefit from corporate holiday travel vouchers worth €300. Through these initiatives, the Greek government is expecting to secure at least 1 million overnight stays in the country hotels.

The European Commission approved of a series of funding initiatives to help the Greek economy under the State Aid Temporary Framework as soon as the pandemic started. These measures are mainly directed to SMEs and households affected by the corona virus outbreak. In more details some of the funding initiatives are presented below.

Although it is extremely difficult for the Greek tourism industry to achieve the numbers prior to the pandemic, significant steps for a normalization period have been taken. Most activities related to the tourism industry (hotels, restaurants, car rentals), although they have suffered significant losses; with the state aid have managed to remain viable and are preparing for the 2021 summer, to claim a significant share of the international arrivals and visitors.



Figure 12. Funding initiatives

VI. Deserted seaside resorts in summer 2020

VI.1. Aspects of crisis

In Greece, there are no deserted seaside resorts due to covid-19 consequences. Of course, the touristic inflow was extremely low due to the restrictions, however, the measures and initiatives taken by Greek government managed to trade off any possible negative effects. No bankruptcies are referred to in any resort across the country. However, it must be said that it is quite early to understand the consequences resulting from the pandemic.

However, in Greece there are some deserted seaside resorts, such “Xenia Resort”. Those hotels built during the 60^s flourished until late 80^s. Some of those hotels were demolished and others were just abandoned. The last years, some private initiatives were taken to reconstruct and re-open those hotels.

VI.2. Some rescue attempts

All the efforts made by the Greek government to save the tourism sector in Greece are described in the above sub-chapter. It is obvious that so far, the measures seem to be having results and, from this point of view, the tourism sector in Greece seems to be saved.

VII. Prospects for the Greek tourism development in the light of the lessons learned from the Corona virus crisis

Following the COVID-19 impact, the tourism industry focused on the financial health of companies and the effect this unprecedented crisis could have on jobs. Other challenges related to declining tourist numbers or loss of revenue were also recognized at an early stage. However, it was indicated that the prevention of bankruptcies and mass unemployment in the tourism sector should be the main concern. It is important to keep in mind that tourism recovery in Europe and in Greece is still at a very early stage and that tourism demand is subject to sudden changes in public health measures. Therefore, new challenges may rapidly emerge in the coming months (such as an outbreak traced to a specific destination), while others (such as weak demand from long-haul markets) may remain present for over a year (Jones and Comfort, 2020; Jordà *et al.* 2020).

The main challenges that the tourism industry will face within the next 6-12 months will include:

- Maintaining liquidity and viability of tourism businesses, and preventing closures
- Limiting the loss of jobs and skills from the tourism sector.
- Low consumer confidence and desire to travel in domestic and international markets.
- Maximising demand in the domestic market.
- Ensuring that tourism businesses can adapt to social distancing requirements (e.g., through purchase and installation of additional hygienic equipment or installing online booking systems)
- Fall in demand for specific market segments or products (e.g., business travel or cruises)
- Reacting to the effects of possible successive waves of the corona virus due to virus mutations.

Some important lessons have already emerged from the COVID-19 pandemic. They include the inextricable links between public health and economic development, public health and the environment, tourism as a key contributor to the prosperity of destinations, as well as our need to leisure and relaxation, as a fundamental aspect of our well-being.

Although the extent of the impact and disruption of COVID-19 on the Greek Tourism & Hospitality sector remains to be seen, it has already presented a challenge across the industry. Traditionally, tourism and consequently hospitality is one of the sectors that recover quickly after a crisis and thus, it is expected that Greek tourism can rebound in

2021 if COVID19 pandemic is eliminated promptly (e.g., successful contact tracing and quarantine measures in all countries, vaccine becomes available). Nevertheless, it remains to be seen if there will be any structural changes (e.g., bankruptcies of major players, hotel closures), shifts in travellers' behaviour and preferences and other long-term impacts on the sector.

VIII. Conclusions

Greece is one of the world's leading tourist destinations. In this report, a description of the main touristic trends in the country is made and the effects of the pandemic are described. It seems that although tourism in Greece, at least for 2020, received a strong backlash; in 2021 and by having received the vaccination, things will get better.

It should be noted that the business support measures taken by the government have been successful in the sense that no tourist businesses have been closed.

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