



CORFU: DESTINATION RE- BRANDING

Initial Report and Toolkit of Resources

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April 2013

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TERMS OF REFERENCE

Dr Heather Skinner is Reader in Marketing at the University of South Wales (the new name for the recently merged University of Glamorgan and University of Newport. The new university is officially launched on 8th April 2013). Dr Skinner is also a Fellow of the Institute of Place Management. Her main research area is in the marketing of places, and she has undertaken research on this subject both within the UK and overseas, including contributing to a British Council symposium on 'Scotland's Place in the World'; undertaking a critical analysis of the rural destination image of the Forest of Dean; gathering an understanding of the use of social media to promote a city region (with Cardiff & Co); providing a critical analysis of Swansea's declining High Street for the BBC TV programme "Week In Week Out – Heather on the High Street", and helping improve Pembrokeshire Town Council's destination image.

On a personal note, I am also a British tourist who has returned to Corfu each year for over 10 years, and I have observed changes to the composition of not only the island's tourists but also its tourism product offering. In particular, I have noticed an increasing number of All-Inclusive (AI) resorts being established in Corfu. Returning to the UK from a holiday in Corfu in August 2011, I read in the Thomson airline's in-house magazine that its *First Choice* package holiday brand was going to offer *only* AI holidays to *all* foreign destinations from 2012. Thomson, part of the TUI AG Group, currently has around 30% of the UK package holiday market share. This therefore provided the impetus for undertaking empirical qualitative research exploring, initially, Corfiot tourist-related business attitudes to the growth of all-inclusive tourism. My involvement stemmed from original research that was presented at the *Advances in Hospitality, Tourism, Marketing and Management Conference* that took place on Corfu between 31st May-2nd June 2012. A copy of the final (as yet unpublished) research paper written as a result of my initial and further research can be found in Appendix I. This paper reports on research undertaken during two visits to Corfu (in October 2011, and in May/June 2012). On each occasion, a small-scale exploratory survey (total respondents n=50) was distributed to a convenience sample of 25 business owners and individuals working in tourism-related services in the North East and South East of the island.

In consultation with the Corfu Chamber of Commerce, this research has now expanded to consider wider issues concerning the future of tourism in Corfu, and, in particular, how Corfu can address the problem of declining numbers of tourists from the UK, specifically those middle-market independent tourists who are not inclined to buy All-Inclusive package holidays.

This report also refers to a review of other relevant research and news reports, and offers an overview of Dr Skinner's initial perceptions of some of the background issues facing Corfu's tourism decline.

In addition, this report has been informed by discussions Dr Skinner had with a number of business people in Corfu during a 5 week visit to the island that took place between 19th February and 23rd March 2013. During this visit, Dr Skinner also delivered the keynote address at a public meeting hosted by the Chamber of Commerce and the Ionian University, details of which can be found in Appendix II. A copy of the slides from that presentation can be found in Appendix III, and some photographs from the event in Appendix IV.

BACKGROUND ISSUES

Introduction

The Greek tourism industry employs up to 768,000 people, but the first half of 2012 saw average daily hotel rates drop by 16%, which has led to many restaurants and hotels going out of business.

International arrivals to Athens have recently fallen by up to 15% as potential tourists worry their holiday would be disrupted by the effects of political, societal and financial instability in the country.

The Greek Islands continue to rely on the mass tourism package holiday model that served these destinations well in the heyday of the 1970s and 1980s, without much change in what the Islands offer tourists – especially those from the UK.

It is not all bad news, because Greece is still a popular destination for UK tourists, rising from 6th place in 2010 to 2nd place (after Spain) in 2011 as UK tourists' 'most-preferred destination'.

A report cited in the Huffington Post (2013) on 'Greece Poised To Make A Tourism Comeback', notes that:

"Tourism in Greece is bouncing back this year in an otherwise flat European market, held back by the weak economic climate, travel industry executives said. The desire for a beach holiday closer to home for cost-conscious consumers in Europe is helping to revive tourism demand in the country, battling recession and a debt crisis. Tourism income for Greece, its chief money spinner, fell by 4.6 percent to 9.89 billion euros from January-November in 2012 according to the country's central bank ... Europe's largest tour operator TUI Travel is also seeing a comeback for Greece, with bookings at the group's German unit up 4 percent. Bookings from the UK are performing strongly, a spokesman said ... Globally, the tourism industry - worth an estimated \$1.15 trillion last year - is expected to grow by between 3 and 4 percent in 2013, driven by up to 6 percent higher visitor numbers in emerging markets, according to latest estimates from the UN World Tourism Organisation (UNWTO). It sees growth in Europe, the world's No. 1 tourist destination, slowing to 2 percent or holding steady at 3 percent as the region's debt and financial crisis rumbles on ... Emerging markets like China and Russia will continue to be the main driver of growth for international tourism, Rolf Freitag, head of tourism consultancy IPK, said ... Last year, emerging market countries attracted 4.1 percent more tourists while their mature counterparts catered for 3.6 percent more travellers, according to UNTWO data."

Predictions for tourism arrivals in Greece were recently reported by the *Around Greece*, and *Ekathimerini*, note that:

"Visitors travelling to Greece for their holidays are expected to reach 17 million this year according to Giorgos Telonis, president of the Hellenic Association of Tourism and Travel Agencies (HATTA) ... up one million from last year."

Destination Image and Destination Branding – the case of Greece

In an article on ‘Destination Brand Strategy: The Case of Greece’, published in 2009, Kouris explains the link between the image of a destination, destination brand identity, and target marketing.

‘Image is the meaning of a destination, and is “what the destination is” in the mind of tourists. Building it is the key tool, as it relates to selecting the set of elements to be linked with brand identity. Image building is in essence a process of positioning. Positioning a destination is the act of designing its offer and image so that it occupies a distinct and valued place in the target tourists’ mind’ (Kouris, 2009:163-164)

He goes on to explain some of the challenges facing Greece overall as a destination, at a time when it may appear prudent to refresh the nation’s brand image in the eyes of key target market segments:

‘Although Greece certainly has world-leading strengths in the offerings of classical archaeology and seaside activities which, to be sure, have been an important drawcard for the nation up to the present, the sea and the sun have become a commodity, and new competition has arisen. Moreover, tourists nowadays demand experiences, rather than mere visits to monuments, from their travels. To this end, it has become necessary for Greece to expand its brand image (its conceptualization as a destination in the minds of tourists) to increase its market share.’ (Kouris, 2009:169)

He concludes that, regarding the new strategy for ‘Destination Greece’:

‘Greece must challenge tourists’ knowledge of the destination by presenting its extraordinary, lesser-known aspects. In essence, the country invites tourists to “discover the Greece you don’t know”.’ (Kouris, 2009:171)

Malkoutzis (2011), in his online article ‘Mired in crisis, is Greece primed for rebranding?’, reports on Peter Economides’ presentation at a conference in Thessaloniki that year, where he presented his ideas on what is holding Greece back and how the country could change the way it is perceived. Malkoutzis’ article reports the following:

‘Economides says that any effort to transform Greece’s image must begin by recognizing what has gone wrong and just how badly it has gone wrong. “The presentation is brutally honest,” he says. “Our image is sick right now, really sick. Branding starts with the truth ... Economides is currently working on rebranding the Cypriot city of Limassol and says Greece can learn from how this project has developed. “It’s exactly what branding has to be in the future,” he says. “It’s an open source project where you talk to the people because the people are the brand. That’s what this country needs to do. Greece is a concept but if you don’t get Greeks to buy the concept, forget about it.” ... The key element to the Limassol project is that it emanated from the private sector. Seven businessmen who envisaged a different future for their city initiated the scheme, which has since developed such momentum that it made it difficult for the public sector to reject the offer to climb on board. “We launched a brand development project, which was process of involving people. Having launched that, we then went to the authorities and asked if they wanted to join us,” says Economides. “The politics of that made it undeniable, they had to join us. But if you go to the political system just with the idea, it’s not going to get off the ground because you’re standing on too many people’s toes.”... “The way to do branding is a public-private partnership. It should be collaborative. To have brand leadership in

political hands is wrong. It's not because politicians are incapable, it's because politics is by nature about opposition, politics is by nature about a four-year term, politics is by nature about making and building political capital. We need to build brand capital, which extends beyond four years," says Economides. The brand strategist, however, stresses that the attempt to rebrand Greece must be about much more than just selling it as a tourist destination. "There are two stages in this: involving the people in the development of the brand and then disseminating the brand so it becomes a behavioral or image guide for people to use generally" says Economides. "It's not to sell tourism. It's to guide the actions of society. It's about changing the way people think and feel. Although the way out of crisis is economic, if you don't feel good, you're not going to do good things. I read the other week that half an hour of worry is more tiring than a week's work. This is a very worried nation and we need to get the worry out of the way. When you have vision, you can do amazing things."

All-Inclusive package holidays

Somewhat worryingly, the UK and Germany that provide the key source markets for Greek tourism also provide the leading markets for All-inclusive holidays.

The TUI AG Group, which owns the *First Choice* package holiday brand, currently has around 30% of the UK package holiday brand. From 2012, *First Choice* has decided to offer *only* All-Inclusive holidays to *all* foreign destinations. This is becoming an increasingly attractive option for families on a budget, especially in this time of global economic crisis.

'All-inclusives can alienate tourists from the destination they are visiting and the people who live there. This can hamper positive cultural exchange, while allowing resentment to build amongst local people who are blocked from being able to benefit from the tourism economy. This can lead to a vicious circle, in which tourism harassment levels increase (an issue frequently capitalised upon by the hotels themselves), which in turn deters people from leaving the hotels' (Tourism Concern, 2012).

Tourism Concern also note some of the following negative issues that have been associated with the growth of all-inclusive package holidays in other countries:

- In Majorca, All-Inclusive holidays have been 'blamed for loss of local business';
- 'only 10% of tourist spend from all-inclusive holidays found its way into local economy' in certain resorts in Turkey;
- All-Inclusive beach holidays 'contributed least economic benefit' in Mombasa where 87% of tourists go on all-inclusive holidays and yet over half of local people live on less than \$1 a day';
- in Jamaica 'all-inclusive hotels attracted tourists in the short term but blocked development of other types of tourism, leading to increased tourist harassment';
- All-Inclusive in the Dominican Republic has been blamed for 'restaurant closures and increased negative attitude towards tourists';
- In Goa, 'local taxis and guides losing business to all-inclusive resorts'.

In terms of economic impact, a report by the Overseas Development Institute (2011) based on data collected in 2009 by the Travel Foundation, noting *‘although popular with tourists, AI hotels are often criticized for their negative impact on local people and the environment, especially in developing country destinations. The proliferation of AI hotels in destinations such as Turkey is also controversial, due to the perception of reduced benefits to the local economy compared with other types of board basis provided by hotels’*, found that

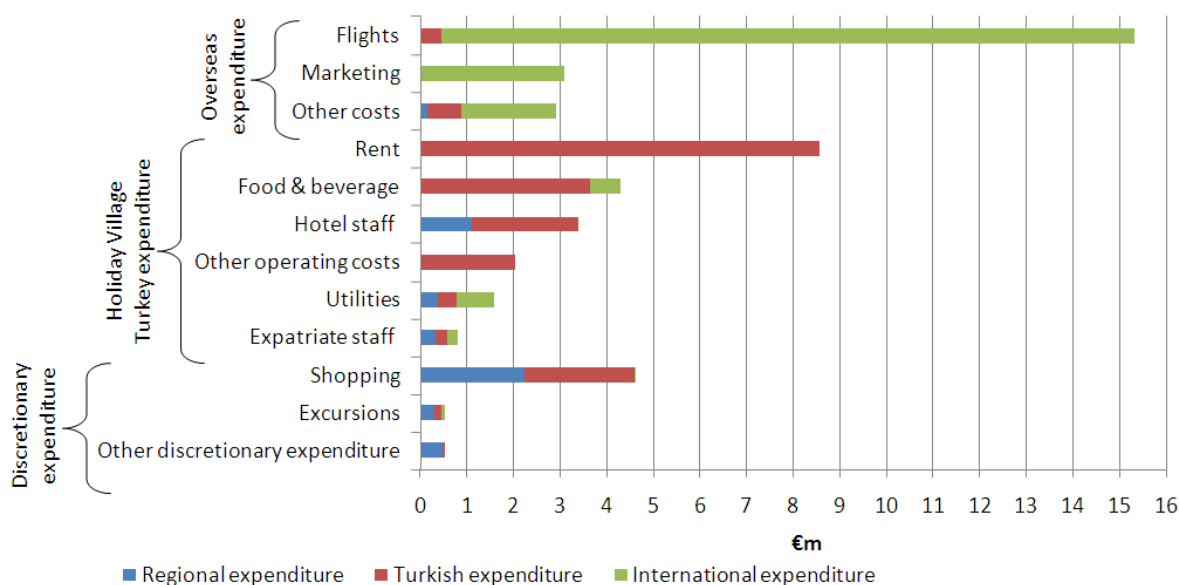
- Of the 100% holiday cost spent by an all-inclusive tourist:
 - Only 55% was directed to the destination country
 - Only 11% was directed to the destination region
 - Less than 2% was spent in the local resort

In this case, in Turkey, *‘although hotel guests spend an estimated €2.6m on shopping outside the permanent shops in the Holiday Village Turkey, approximately three-quarters of this total was spent at weekly markets held within the Holiday Village ... and in nearby towns ... permanent shops in captured only about €0.5m or 8% of total discretionary expenditure’*.

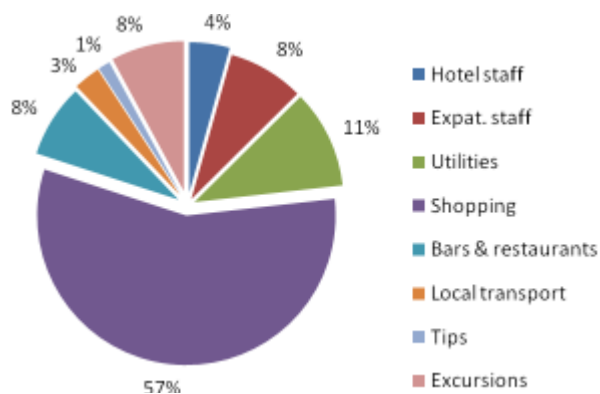
This report also noted the value of excursions to the local economy:

‘Although excursions are a small proportion of the Holiday Village Turkey value chain, they are an important linkage with the local area because they take place outside the resort and so offer the opportunity to spread the benefits of discretionary expenditure more widely into the local economy’.

The Holiday Village value chain was shown as follows:



The distribution of income generated by All-Inclusive tourists into the local economy was shown as follows:



As a result of this investigation, in the 2010 season, several recommended interventions were implemented, aiming to provide a classic ‘win-win-win’ situation for tourists, the tour operator and the local economy:

- Accommodation costs for TUI UK & Ireland were reduced;
- Labour conditions for the hotel workforce were improved;
- 23% of expatriate staff positions were localised and this helped increase customer satisfaction scores by tourists; and
- Three changes to the supply chain (localisation of expatriate jobs and local purchase of fresh fruit vegetables and laundry) and increased the impact of Holiday Village Turkey on the regional economy by about €0.8m a year.

It can also be seen that the growth of all-inclusive package holidays is now turning many Greek hotels into enclaves where tourists are not encouraged to spend time and money outside, especially if these tourists have taken an all-inclusive package to reduce the in-resort costs once on holiday.

Implementing similar interventions could also help the local economy and local supply chain in Corfu benefit more from All-Inclusive tourism.

THE CASE OF CORFU

When focus is placed on tourism it tends to focus on either Greece as a whole, or Greek Islands in general. Little is understood about specific issues facing specific islands such as Corfu, the closest Greek island to the UK, with many historic links with UK, and an island that continues to attract between 50-70% of its tourists each year from Britain.

Findings from my initial research

50 questionnaires and 10 interviews were undertaken in October 2011, and in May/June 2012 with business owners and workers in both the North and South of Corfu. The majority have been involved in working in tourism related businesses for over 20 years (46%), with a high proportion (22%) being involved for over 11 years, and 32% involved for up to 10 years. 54% of respondents were local Corfiot people, 30% were British people who either owned or worked in tourism related businesses, and a further 12% were other nationals.

80% of those surveyed strongly agreed that the tourism season now is shorter than it was 10 years ago. While recognising that there have been changes to the nature of tourism on the island, 90% of respondents do not believe that tourism in Corfu has changed for the better.

Although many of the same tourists return to Corfu year after year, where once they came for 2 weeks, some may now only come for 4 or 5 days at a time – for British tourists this has been facilitated by airlines such as Easy Jet offering flexible bookings whereby tourists do not have to book on a flight-only option with a tour operator who flies out only once a week and offers durations of only one or two weeks, so the type and number of independent tourists Corfu can attract easily, and who can spend the money in tourism-related businesses that the Corfiots desperately need will be determined by the airlines and tour operators.

80% of those surveyed believe that the growth of All-Inclusive tourism packages is the biggest problem facing the tourist industry in Corfu. One interviewee, a senior member of the guest relations team in a Five Star hotel on the island commented that:

'All-inclusive is not good. This hotel would not retain its 5 stars if it went all-inclusive, nor would it retain its 5 star guests. The hotel would not be able to maintain a high quality of food or branded "blue label" drinks, if it went all-inclusive, it would not be able to keep its a la carte restaurant, it would be overrun with families and children, and be a noisy place. The hotel is very much against the entire all-inclusive concept.'

Another interviewee commented:

'the standard of All-Inclusive in the hotels is on Corfu very basic foodwise and I have experienced many complaints about the accommodation but mainly the food is often "inedible", "disgusting", "pigs swill."'

82% of those surveyed believe that All-Inclusive tourists do not spend enough money locally, and 80% do not believe that All-Inclusive hotels encourage tourists to spend money on other local businesses. One businessman who owns a bar in a resort North of Corfu Town said that in that resort:

'2,500 people are now accommodated in 3 hotels that have gone over to all-inclusive. All-inclusive has killed the town. Imagine when these 2,500 people were all walking down the road in the town and eating and drinking in the town'.

SUMMARY OF PROBLEMS FACING THE FUTURE OF TOURISM IN CORFU

The growth of all-inclusive tourism is turning many hotels into enclaves where tourists are not encouraged to spend time and money outside, especially if these tourists have taken an all-inclusive package to reduce the in-resort costs once on holiday.

However, broadening the issue wider than simply the challenges faced by the growth of all-inclusive tourism to Corfu, other issues were also identified that any re-branding strategy should address. In discussion with individuals running tourism-related businesses during my visits to the island, the following common issues were raised:

Key Problems

- Declining tourist numbers from the UK
- Need to refresh and revitalise tourism offerings
- Falling tourist spend from mass tourism options
- Short 2 - 3 month tourist season in many resorts
- Over-reliance on tour operators
- Low rental fees to accommodation providers
- Lack of investment in improving tourism offering – tourists in 2013 are presented with 1980s resorts
- Hotels easy to turn into All-inclusive
- All-inclusive tourists less likely to return
- Need for re-branding & re-positioning to attract:
 - higher-spending ‘middle-market’ tourists
 - independent tourists (not package holidays)

Infrastructure / Improvement

- Poor roads, potholes, road and beach erosion etc
- Some resorts lacking in Public Facilities
- Patchy WiFi Network
- Need for better co-operation & collaboration between businesses
- Need for better Tourist Information Provision
- Need to attract more Airlines (particularly low-cost providers) to provide direct flights
- Need to improve relations with some Tour Operators

Up-grading

- Accommodation
- Bars / Restaurants
- General image of tourist resorts

Promotion

- Co-ordination of effort
- Consistency of message
- Single Web Portal

TURNING AROUND TOURISM DECLINE – THE CASE OF OTHER ISLANDS

Rhodes

Rhodes tourism influx went from 1.1mil to 1.9 mil in 3 years. A TV clip “The man behind the Mayor” was filmed in 1999. This focused on the efforts of the Mayor of Rhodes, Yianni Mahdis, in driving the efforts at improving the island’s tourism fortunes.

Malta

(see reference list for articles by de Marco, 2013; and Lindsay, 2007, for more information)

- 1,243,000 tourists in 2007 (17% more than 2006)
- 2007 tourism expenditure reached €1 billion
- 1,440,000 tourists in 2012 (200,000 more than 2007)
- 2012 tourism expenditure exceeded €1.3 billion (€272 million more than 2007)

The island did this by pursuing strategies to attract more tourists to Malta:

- Attracting more low-cost airlines
 - 57 direct routes in 2007, increased to 81 in 2012
- Promoting the island better overseas
 - Especially using the internet
- Diversifying into new geographic markets
 - Israeli market up 2,330%; Italian market up 76%; Spanish market up 64%

And also by ensuring a good experience for tourists once they had chosen to visit Malta, through investing heavily to ensure that tourists enjoy a positive experience in return for their money, with millions spent in upgrading built heritage, in embellishing public spaces, in creating new visitor attractions and improving the country’s infrastructure.

As a result, the investment is bringing more repeat visits. Maltese hotels in 2011 and 2012 had 2nd highest occupancy levels in the EU. Gross operating profit per available room has increased year to date by 8.1% (5*), 19.2% (4*) and 14.6% (3*) accommodation and is the highest registered in the past 5 years in all 3 categories.

Bahamas

(see reference list for Tourism Intelligence International article for more information)

Grand Bahama island has natural beauty, an excellent warm climate, friendly and hospitable citizens, but tourist arrivals were down, occupancy rates at hotels and resorts were low and there was severe pressure on the tourism industry as a whole. The ethos of their ‘Tourism Begins at Home’ strategy was to promote and expand tourism from within. Its main aim was to encourage nationals of the Bahamas to be tourists in their own country. This not only created an increase in tourism activity but also gave Bahamians a greater appreciation for their country and thus made them better tourism ambassadors and tourism ‘experts’.

Tobago

Nine all-inclusive hotels account for 33% of total room capacity on the island. Of the nearly 35,000 holidays in all-inclusive properties each year in Tobago, two thirds (23,000) are to UK tourists. A significant proportions of total tourist expenditure does not reach Tobagonians, or does not remain on the island for very long. Two main reasons for this are that all payments are made abroad and while most all-inclusive hotels are owned by Trinidadians, only one is

Tobagonian-owned. The absence of six critical success factors – competitive price, consistent quality, wide variety, reliability of supply, access to credit facilities and business acumen - were found to be responsible for the poor performance of the local supply chain, giving Trinidad suppliers the competitive advantage over Tobago businesses.

Tobago turned things around by concentrating on the following areas:

- Facilitate business
 - Capacity building, mentoring in business skills
- Farmers and fishermen
 - Gain commitment from all-inclusive hotels, and local restaurants to source local produce
 - Hold weekly markets for tourists to buy direct from growers
- ‘Made in Tobago’
 - promote local art and crafts and ‘local labels’ of a wide range of locally produced goods through exhibitions and events in all-inclusive hotels
 - promote local cuisine with locally sourced produce in all-inclusive hotels
 - better information to tourists when produce is locally sourced in restaurants, shops etc
- Customer service
 - Hospitality training for local businesses, including taxi drivers, shop keepers, and hospitality staff
 - Broaden excursions for tourists to include visits to local agricultural producers

As I believe some of the strategies employed to improve the local tourism economy in Tobago could usefully be employed to improve the local tourism economy in Corfu, I have included an extract from Abdool and Carey’s (2004) report ‘Making All-Inclusives More Inclusive: A Research Report on the Economic Impact of the All-Inclusive Hotel Sector in Tobago’ into the toolkit of resources accompanying this report. It can be found in Appendix V.

STEPS TOWARDS STRATEGY DEVELOPMENT

Research

As well as undertaking further primary research into the issues identified earlier in this report, including research into the perceptions, attitudes, and behaviour of tourists, there is already a wealth of information that can be found through secondary sources such as news reports, televised documentaries, and on social media, that can help inform an understanding of the way UK tourists may be forming their own images of Corfu.

Online sources

It is advisable to know what is being communicated about the island and its various resorts and tourism-related service organisations and businesses to UK tourists. The following (which by no means is an exhaustive list) can offer some good insights into tourist-related issues of specific relevance to Corfu that are accessible online:

- Review websites
 - Especially *Trip Advisor* – for the island, its resorts, and individual businesses
- Personal Blogs
 - <http://www.maddiegrigg.com/2013/03/corfu-tale-of-two-islands.html>
 - <http://grandmasscribbles.blogspot.gr/>
 - <http://johncorfuworld.blogspot.co.uk/>
 - <http://www.corfubloggers.blogspot.co.uk/>
- Fora and Facebook Groups
 - Agni Forum <http://www.agni.gr/holiday-forum/forums.html>
 - All Corfu <http://www.allcorfu.com/>
 - Alternative Kerkyra <http://www.alternativekerkyra.gr/>
 - An initiative set up by Green Corfu, to promote alternative activity holidays on the island, and also to promote local products.
 - Corfu Forum <http://www.corfu-forum.com/forum/index.php>
 - Corfu Grapevine
 - This group was created with the foreign population living in Corfu in mind, where you can communicate whether from the North, South or central of the island about whats going on at the moment, if you are looking for something, selling a used item, requesting advice or just want to pass on your experiences regarding local offices or services etc., here is the place to do it.... However, we have had so much interest from people who have previously lived here, want to live here or holiday here year on year, and who are now Members of the group - please be aware that your comments are reaching a much wider audience.
 - Corfu Island <https://www.facebook.com/CorfuIsland>
 - Corfu Portal <http://corfuportal.gr/>
 - Corfu Selections website which promotes independent travel to Corfu <http://www.corfuselections.com/>
 - Explore Corfu <https://www.facebook.com/explorecorfu>
 - Green Corfu <http://www.greencorfu.com/> and their blog <http://greencorfu.wordpress.com/>
 - GreenCorfu.com is a website that wants to promote a different Corfu, a Corfu that is not so well known either to Greeks or to people from all over the world. First of all, on a very basic level, Corfu has more to offer than

golden sandy beaches, sun and a crystal clear blue sea. Corfu is a green island, because of its lush vegetation all year round, full of olive trees, cypresses, and a wealth of other plants, insects, birds and animals. It's an island that is ideal for tourism all year round. You can walk through the beautiful countryside, go horse-riding over ancient paths, cycle amid awe-inspiring olive groves, taste traditional local products, visit traditional wineries, olive presses, picturesque churches and ancient castles, relax and spend your vacations in contact with pure natural beauty. On a second, more important level, Green Corfu stands for change. Change in the way we think, act, perceive ourselves and relate to others and Nature. And, of course, in the way we spend our holidays! We are in the middle of the biggest crisis this world has ever known. The old is crumbling before our eyes and the new is already being born. This new attitude has to do with awareness, respect for Nature, cooperation, solidarity, giving rather than taking. And it is being manifested on Corfu in many different ways. All kinds of nice and interesting people are moving to Corfu from all over the world, including mainland Greece. Many of them are meditating, practising art and alternative forms of medicine. Especially in north-west Corfu, around the village of Arillas, a centre for spiritual development and alternative lifestyles is developing. People are growing organic and paying more attention to what they eat. And it's not just the newcomers. Local people are also starting to become active and want to have a say in what their future will look like! We want to introduce you anew to this green island, full of positive energy!

- Real Corfu Portal
<https://www.facebook.com/RealCorfu?ref=stream#!/groups/realcorfuinsight/>
 - Real Corfu Portal is for inspirational ideas and media to help push forward the re-branding of Corfu from the people who live on the Island
- What's On Corfu <http://www.corfuwhatson.com/>
- What's Up Corfu <http://www.whatsup-corfu.com/>
 - Although currently hibernating due to broadband and resource constraints, the concept of our website and our free newsletter can certainly help promoting Corfu for its many events. We feel the rich social and cultural life on Corfu can be one more way to promote the island also outside the traditional tourist season.

There are also online groups, community pages, and fora dedicated to various of the island's resorts, and also pages for specific interest, including, for example, Corfu Gardens, Corfu Wild Flowers and Wildlife, Corfu Donkey Rescue.

Television

- Corfu: A Tale of Two Islands
 - Documentary following the lives of expats and tourists enjoying the attractions of the Greek island. See info at <http://www.radiotimes.com/programme/shc8q/corfu-a-tale-of-two-islands>. Many of the episodes from this programme can be accessed via YouTube.
- What Happens in Kavos
 - Documentary series following young Brits over a summer in Kavos, Corfu, to get a glimpse of what really happens in the hedonistic party town away from

parents and surrounded by temptation. See
<http://www.channel4.com/programmes/what-happens-in-kavos>

Print Media

Although there are many more articles that cover different aspects of the island, it is worth pointing to 2 recent articles that cover specific issues related to Corfu:

The Sunday Mirror

- Full page report in the Travel Section of this newspaper



The Guardian

- Good news from Greece! Local holiday ventures are on the up - Enterprising people all over Greece are defying the financial crisis and using the riches of their local area to develop new types of holiday a world away from old-style package tourism. (This article includes a report on the Green Corfu initiative)

<http://www.guardian.co.uk/travel/2013/mar/22/greece-islands-new-holiday-ventures>

DEVELOPING A VISION

A very useful tutorial that briefly explains the place branding process can be accessed from <http://www.ourplacebranding.com/>.

It is vitally important that those responsible for developing any re-branding for Corfu agree on a vision that will guide any developments. This vision must also incorporate the views of all groups of stakeholders (from the public, private and non-profit sectors) who have an interest in contributing to improving the future of tourism to the island.

Representatives from all stakeholder groups should be included in discussions regarding managing the brand on a local level, while also ensuring commitment from any Greek National organisations to ensure a co-ordinated and consistent approach.

It is also worth considering initiatives already working well on the island that have come about through co-operation between local businesses. For this reason I have included in Appendix VI a short case study on the resort of Arillas, in the North West of the island (prepared by Alex Christou of Green Corfu).

ACTION PLAN

An action plan should be developed that addresses each of the elements of the re-branding strategy. I would recommend that areas of focus should be two-fold:

- Attracting more UK tourists
- Improving the tourist experience, and serving all tourists well when they are here to encourage repeat visits and to encourage positive word-of-mouth (word-of mouse)

Tourist Segmentation and Target Marketing

Various visitor types must be carefully identified in order to help understand the different wants, needs and behaviours of both current and new target market segments. Once these have been identified, it will be easier to target different visitor segments with different promotional messages and through different appropriate communication channels.

While not neglecting the sun, sea and sand package holiday tourist, Corfu needs to target the middle market of independent, free-spirited, UK holidaymakers, who will book accommodation direct with hotels, villa, and apartment providers, and spend more money with local businesses, and on locally produced goods when in-resort.

Effective promotional messages targeting such UK tourists may be built around straplines such as:

- Re-discover Corfu
- Think you know Corfu? Think again

The message content should:

- Focus on the island's rich culture, history and heritage
- Focus on freedom, independence, and the wide range of positive things Corfu can offer

It is worth developing strategies to attract more tourists outside of the July and August peak season. This can be done by focusing more on alternative type activity holidays, including, for example:

- Active tourism & Activity tourism
- Agro-tourism & Eco-tourism
- Festival tourism & event tourism
- Disabled tourism
- Wedding tourism

More details on some of the initiatives and activities I heard about while here on my visit can be found in Appendix VII.

Communication and co-operation

- All local business owners need to gain a better understanding of what UK independent travellers want
- And then provide better in-resort information for independent tourists
- Accommodation providers need to replace the services of the tour company representative when serving independent travelers
- Instead of focusing on the negative aspects of competition, local businesses should support and promote each other
- Know what is going on across your island – that way you can provide better information to independent travelers

Tourist Information Provision

If you are operating an accommodation business (particularly self catering apartments), when an independent traveller arrives at your apartment, think about providing a welcome pack in the room in order that they can find out information about:

- Local bus times and the location of the bus stop
- Supermarkets, banks, pharmacy etc opening times
- Events taking place on the island (this should be kept up to date and include information about what will be taking place on the island over the duration of the tourists' stay)
- Local attractions
- How to access UK terrestrial TV through internet sites such as <http://www.filmon.com/>
- Wifi Code for the apartment (if you have wifi – and if you don't then think about installing it)
- Contact telephone numbers for the managers / owners of the apartments.

Open for Business

- Attract more direct routes from more low-cost airlines
 - Learn from the case of Malta. What did they do to attract more airlines?
 - Ask the airlines who currently operate winter flights, or direct summer routes to Corfu what motivated them to do so, in order that you may target other low cost airlines with similar opportunities, and try to establish what more could be done to increase the number of flights they operate.
- Better information about ferries and buses to Corfu
 - Especially in the shoulder months, when there are limited flights to Corfu, and no direct flights from the UK, independent travellers may choose to fly to Athens or Thessaloniki, and then make their way to Corfu. Help provide as much relevant information as you can to facilitate such independent travel.
- Resorts need to be fully open for business for the entire duration of the season that is served by all these routes.
 - Corfu needs to be Open For Business when it has tourists who wish to come to the island. There appears to be a reticence from some business owners to open early in the season, or to stay open later in the season, unless they can be assured high tourist numbers will be there for them. However, tourists will not come to the island in high numbers outside of the main July / August period unless they can be assured there will be services for them. It has been noted in a range of social media channels that there are tourists wandering around some of the island's resorts (and also around Corfu Town itself) trying to find a good choice facilities such as shops and tavernas open for their business.
 - I have also heard of:
 - business owners who have been painting their buildings ready for the season washing their paintbrushes out in the sea – in front of the few tourists who are currently on the island. This is not the sort of behavior that should be encouraged;
 - tourists staying in accommodation in March / April that has not been adequately aired or heated. Putting tourists up in sub-standard accommodation with sub-standard facilities is not good enough.

Visual identity and improvement in the 'look' of resorts

Many premises in a number of resorts are closed down. This leaves a resort looking tired, and dilapidated, especially when these business premises are not maintained well. It may be worth exploring the potential for 'meanwhile use' – whereby a business or group of individuals engaged in, for example, creative or cultural industries, can rent a property at a lower than commercial rate, but will commit to keeping the property open and maintain its physical infrastructure. Such initiatives are working well in the UK to ensure that high streets in smaller towns do not end up completely boarded up and devoid of footfall. See, for example: <http://www.meanwhitespace.com/about/about>. It may be that local or national government could be persuaded to offer tax breaks to any landlord who allows meanwhile use of their property until such time as the economy recovers enough to support full occupancy at full commercial rents.

A number of citizen-led initiatives have also been undertaken to help clean up the island, and its beaches early in the season.

- The Kantounistas is the name of a group of Corfu residents, dedicated to doing as many as possible of those tasks that other people wait to have done for them – see them in action on YouTube <http://www.youtube.com/watch?v=pLGzK8WA8X4>
- There is also a facebook page dedicated to ‘Tidying up Corfu’ - <https://www.facebook.com/groups/432217563515092/>. This also links to specific local initiatives e.g. clean the beach initiative – organised by locals in Sidari <https://www.facebook.com/#!/events/156873051145707/>
 - At this point I would like to reproduce a comment from this page from someone involved in this initiative:
“the beach here has not been cleared before June for 7 years now and it's destroying what little reputation the resort has left. If you feel you could help with this please do. If our efforts make a difference here then maybe the whole Island might jump on the band wagon. Yes we know it's the municipality's responsibility, BUT, we are all aware of difficulties to get authorities to be "pro-active" here so we are taking upon ourselves.”
- Other attractions have also been identified as falling into disrepair, for example, I was contacted about Mon Repos. Considering the links between this place and the British Royal Family (Prince Philip was born at Mon Repos) I think more could be done to maintain and promote this as an attraction to the UK independent traveller. These are the comments from a local resident:
“Mon Repos, an amazing place given its natural beauty and history. In my eyes, this place alone could be such an attraction and money maker for the council who own and 'manage' it. Take a walk there and you will undoubtedly see for yourself the potential the place holds. For example, hire out for weddings, a nature park, it should be a place to be proud of not a place left to rot, it has so much potential. At present it has an amphitheatre rotting away, a temple dating back to the 4th century - now collapsed and amazing fauna falling and rotting and enticing pathways blocked by fallen trees. 3 Mystical beaches and stone jetties falling to rack and ruin.”

There have been various suggestions about selecting a Corfu Colour Palette – to help strengthen a more distinctive visual identity for Corfu. There already is a *Corfu Specials* brochure by the paint company Vitex that offers a range of co-ordinating colour paints in traditional Corfu colours. The brochure can be downloaded from:
<http://www.vitex.gr/flash/colors/Corfu-Specials/colors03-EN.html>.

Corfu also needs to retain (or even re-attain) its Corfiot / Greek identity. So many resorts were created to target the growth in mass tourism by UK package holiday makers the island experienced since the 1970s that many resorts no longer have a Corfiot ‘feel’ to them. Instead, there are hotels, tavernas and restaurants that obviously target UK holiday makers through the use of English names (many of which may now be considered out-dated and not attractive to contemporary UK independent holidaymakers) and signs displaying English food and drinks.

Web portal

A simple Google search for 'Corfu' brings up over 17 million results. Outlined earlier in this report is also a list of some of the various diverse Corfu websites, fora, portals and community group pages. It is my firm belief that the island needs *one* portal from which all of these the other pages feed.

UK tourists are used to pages like these run by other Destination Management Organisations in other countries called 'Visit x' (including the GNTTO's own Visit Greece website <http://www.visitgreece.gr/>). I suggest therefore the creation of a new web portal set up a VisitCorfu website, hosted by the Chamber of Commerce and the Ionian University. This would provide:

- A cost-effective way to attract tourists and help serve them better in-resort
- A single (not privately run) web portal for ease of searching
- Links to all other independent and private sector web pages
- An easier way for tourists to make direct bookings with local businesses

The homepage of this portal must be clearly laid out, not too much information, not too much need for scrolling down to find what you are looking for, and therefore offer a range of tabs that those searching the site can go to in order to find out different types of information. As part of my research undertaken in my recent visit to the island, I crowd-sourced (via the Corfu Grapevine) a list of the following types of information that people believe would be of interest to tourists and which should be included on the portal:

- Independent accommodation providers
- Bars / restaurants / tavernas
- Shops
- Tourist attractions / activities / excursions
- Festivals / Events
- Local food & drink producers / craftspeople / artisans
- Vehicle hire (cars / motorbikes / quadbikes)
- Taxi services
- Holistic therapies / Health spas
- Wedding organisers
- Language teachers

I would suggest a good website to emulate is that provided for visitors to Cardiff, the capital city of my own country, Wales. See <http://www.visitcardiff.com/>. This website offers a clear unfussy front page, with different (colour coded) tabs for ease of searching, whether someone is visiting Cardiff as a tourist, or coming to Cardiff to work, shop, invest, meet, study, or come to an event. Each page then links to a range of relevant social media. Appendix VIII contains a case study and a copy of the powerpoint presentation I made at the based on the use of the internet and social media by Cardiff & Co.

Social Media

It is also important to encourage visitors to the web portal share their photographs and stories with each other via social media such as, for example, Flickr and Trip Advisor. This does require some level of trust in your visitors, as these sites rely on user generated content outside of your control. It is relatively easy to monitor content, but important to realise this is about you listening to your visitors, not censoring what they post.

- Know what is being said about the island, its resorts, and individual businesses on social media sites
- Co-operate with each other – link to each other's social media sites
- Consider social media training, or facilitate social media champions in each resort
- Consider use of QR (quick response codes) and AR (augmented reality).

Notes on effective use of social media are also included in the toolkit of resources – see Appendix IX

CONCLUSION

Greek islands continue to rely on the mass tourism model that served these destinations well in the boom period of the 1970s and 1980s, however, in many resorts little has changed in the offering to tourists since that time.

I believe that Corfu has reached a ‘tipping point’ where the current decline could become fatal if immediate steps are not taken to halt the decline and turn things around, but that it is not too late to do something positive right now. And it is not all bad news, because Greece is still a popular destination for UK tourists, rising from 6th place in 2010 to 2nd place (after Spain) in 2011 as UK tourists’ ‘most-preferred destination’. However, Corfu cannot rely solely on the efforts of the Greek National Tourist Organisation, the island must take control of its own tourist fortunes to effect positive change.

With regard to tourists from the UK (although this may be replicated for other source markets), this change should focus on attracting more independent travelers, not package holiday makers (particularly those booking All-Inclusive packages). These tourists can help extend the season as they may be more willing to travel outside of the high season of July and August, but to serve them well when they are on the island it is imperative to offer a range of activities for them to participate in, and a wide range of attractions for them to visit while they are on the island. To do this, Corfu must be ‘open for business’ from late March (when the first direct flights and cruise ships start coming to the island) to October when the last tourists leave. Resorts must be refreshed, look open, welcoming and inviting, and above all, resorts should look ‘Corfiot’. Accommodation may need to be upgraded to serve the needs of 21st century tourists – what was good enough in the 1970s, 1980s, and even early 1990s is no longer ‘good enough’ for travelers in 2013 and onwards. Local businesses need to understand the way co-operation and collaboration rather than fierce competition can actually help everyone. Learn from other cases – resorts on the island (such as Arillas) that are turning things around by taking control of their own destiny, and learn from cases of other islands that have improved their tourism fortunes by, for example, attracting more low cost airlines to offer direct flights, investing in accommodation and infrastructure, offering ways for All-Inclusive hotels to better contribute to the local economy, making it easier for tourists to book direct with local tourist service providers, and making it easier for tourists to spend money on local produce when in-resort.

It is important to keep up the profile of Corfu on the internet and social media. My university has already published a story about the public meeting that took place in Town on 13th March <http://news.glam.ac.uk/news/en/2013/mar/14/glamorgan-marketing-expert-help-tourism-economy-co/>. Once the web portal is up and running it will be important to ensure that it is fed regularly and updated with information and news stories. Co-operation and collaboration between businesses on the island will be vitally important to ensuring its success and the success of the other action points recommended in this document.

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Anyone who wants to follow me on Twitter can do so @HeatherUniGlam

RECOMMENDATIONS

Learning:

- From what other islands have done to turn things around
- From what other resorts have done in Corfu (e.g. Arillas), and from what other businesses are doing to turn things around
- From your customers – undertake research to find out what they need, or use the results of research already undertaken on the island from tourists in other resorts – share your information with each other, it will be to the benefit of you all.
- What is being said (good and bad) by visitors to the island on social media sites. Capitalise on the good positive feedback, and do something to address the bad, negative feedback.
- To think positively – it's not too late to turn around the fortunes for tourism in Corfu

Different ways of thinking:

- Need for better co-operation & collaboration between businesses (establish a Union of Business Owners in each resort who can take control of improvements)
- Need for better Tourist Information Provision - Independent accommodation providers (i.e. not using the services of a tour operator's representatives) must offer better information to tourists – almost taking the place of the rep.
- Need to attract more Airlines (particularly low-cost providers) to provide direct flights
- Need to improve relations with some Tour Operators

Upgrading

- Accommodation
- Bars / Restaurants
- General image of tourist resorts
- Infrastructure and road network

Attracting more / different types of tourist:

- Need for re-branding & re-positioning to attract:
 - higher-spending 'middle-market' tourists
 - independent tourists (not package holidays)
- Promote activity holidays, including, for example:
 - Active tourism & Activity tourism
 - Agro-tourism & Eco-tourism
 - Festival tourism & event tourism
 - Disabled tourism
 - Wedding tourism

Promoting the island to UK tourists:

- Using straplines such as:
 - Re-discover Corfu
 - Think you know Corfu? Think again
 - The message content should:
 - Focus on the island's rich culture, history and heritage
 - Focus on freedom, independence, and the wide range of positive things Corfu can offer

Co-ordinating efforts

- To ensure consistency of message
- Creation of one Single Web Portal, this can have links to all of the other websites, and social media sites that tourists may find relevant – information must be kept current and updated regularly

Training

- Facilitating business
 - Capacity building, mentoring in business skills
 - Hospitality training for local businesses, including taxi drivers, shop keepers, and hospitality staff
 - Tutorials in the use of the internet and social media for tourism marketing

Supporting local producers

- Farmers and fishermen
 - Gain commitment from all-inclusive hotels, and local restaurants to source local produce
 - Hold weekly markets for tourists to buy direct from growers
- ‘Made in Corfu’
 - promote local art and crafts and ‘local labels’ of a wide range of locally produced goods through exhibitions and events in all-inclusive hotels
 - promote local cuisine with locally sourced produce in all-inclusive hotels
 - better information to tourists when produce is locally sourced in restaurants, shops etc
- Customer service
 - Broaden excursions for tourists to include visits to local agricultural producers

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TOOLKIT OF RESOURCES

APPENDIX I

The Corfiot host's gaze on all-inclusive tourists¹

by Dr Heather Skinner

Abstract

All-inclusive (AI) holiday packages have provided many benefits to tourism in destinations that may have had difficulty attracting risk-averse tourists due to perceptions of high levels of crime and low levels of tourist security. However, there has been a recent growth in AI holiday packages in Western European destinations, where it appears that cost rather than tourist safety concerns is the primary driver of tourists purchasing AI packages, yet where such enclaves as AI resorts are also seen to limit interactions between the guest and the host, and thereby further distance the guest from the host.

Although Greek islands have been at the maturity stage of the product life cycle for a number of years in key source markets such as Germany and the UK, issues affecting the hosts' gaze in Greece and its island resorts have been paid very little attention in the extant literature. Interestingly, the UK and Germany that provide the key source markets for Greek tourism also provide the leading markets for All-Inclusive (AI) holidays.

In seeking to understand the Corfiot host's gaze on all-inclusive tourists in general, and tourists from Britain in particular, this paper's contribution is in exploring the changing nature of the hosts' gaze in response to the changing nature of contemporary mass tourism, particularly contextualised against the growth of AI packages in mature European tourism destinations.

Keywords: All-Inclusive; Corfu; Greek Islands; UK tourists; hosts' gaze.

¹ NB: This paper is as yet unpublished. However, it is in review with an academic journal and therefore must not be quoted without prior express permission of the author.

Introduction

Documentation of the tourists' gaze is becoming increasingly more accessible given 'the increased numbers of travel blogs, reviews and images being posted by tourists themselves' (Greaves and Skinner, 2010:492). As Dioko and Harill (2011:220) note, 'social and networking media enable and empower a digitized social and communication environment rich with intercourse occurring therein among netizens elaborating on their travel experiences and providing substantial reviews of destinations'. However, the hosts' gaze is less understood and its documentation less accessible. Issues affecting the hosts' gaze in Greece and its island resorts have been paid very little attention in the extant literature. This paper is focusing on the hosts' gaze in Greek Island tourism for three main reasons: the nature of tourism in these destinations and stage in the product life cycle; the changing nature of the hosts' gaze on their preferred foreign tourists; and the changing nature of tourism packages being offered to these preferred tourists in their home countries.

Greek islands have been at the maturity stage of the product life cycle for a number of years in key source markets such as Germany and the UK (Buhalis, 1999), leading to calls for the Greek National Tourism Organisation (GNTO) to refresh and revitalise its tourism offerings. However, the Greek Islands continue to rely on the mass tourism model that has served these destinations well in the past. Despite this, Greece rose from 6th place in 2010 to 2nd place (after Spain) in 2011 as UK tourists' 'most-preferred destination' (Leviev-Sawyer, 2011).

While the Greek Islands' dependence on tourism has been specifically noted by Buhalis (1999), Coccossis (2007), and Tsartas (2003), the wider tourism literature tends to consider Greece as a whole, with only occasional focus on its islands. When attention is paid to Greek island destinations, these tend to be treated holistically, with few academic articles relating to individual islands. Moreover there have been only a small number of academic articles that relate tourism issues specifically to Corfu, a Greek island which continues to attract between 50-70% of its tourists each year from Britain. Tsartas (2003) found that hosts on islands such as Corfu tend to prefer foreign to domestic tourists. However, while British tourists are the third most preferred foreign tourists to the island after Germans and Italians by Corfiots, British tourists are also deemed by Corfiots to be 'cheap tourists' (Tsartas, 2003:120).

The author of this article is a British tourist who has returned to Corfu each year for over 10 years, and has observed changes to the composition of not only the island's tourists but also its tourism product offering. In particular, the author has noticed an increasing number of All-Inclusive (AI) resorts being established in Corfu. Returning to the UK from a recent holiday in Corfu, the author read in the Thomson airline's in-house magazine that its *First Choice* package holiday brand was going to offer *only* AI holidays to *all* foreign destinations from 2012. Thomson, part of the TUI AG Group, currently has around 30% of the UK package holiday market share. This therefore provided the impetus for undertaking empirical qualitative research exploring the Corfiot host's gaze on all-inclusive tourists in general, and on tourists from Britain in particular.

At the recent *Advances in Hospitality, Tourism, Marketing and Management Conference* held on the island of Corfu between 31st May-2nd June 2012, the Mayor of Corfu outlined in his opening address that the current focus for the island is in 'trying to promote innovative initiatives despite the current financial crisis', actively trying to promote Corfu to various tourism markets, and 'improving knowledge and competencies in tourism'. The conference

was then addressed by the Greek government's former Minister of Tourism and Culture, Angela Gerekou, who was born in Corfu, and who identified that 'Corfu is the most characteristic island showing how tourism has developed in Greece since the golden decades of the 1970s and 1980s until today'.

Tourism-driven socio-economic changes in Greece

The Greek tourism product originated from developments along its coastal and island regions which provide the location of more than half of all the hotels in Greece (Coccossis, 2007), with mass tourism across Greece building on the success of the models 'developed in the 1960s and 1970s (in Rhodes, Corfu, Mykonos etc.)' (Tsartas, 2003:124). However, it is the mass tourism model that has contributed to the short tourist season as the majority of visitors arrive in July and August. 'Hence the infrastructure is not used to its full capacity and it is difficult to achieve full returns on the investment when in most regions the tourist season does not last more than 2–3 months' (Tsartas, 2003:124). It is also this mass tourism model, leading to the development of hotels that then become relatively easy to turn into AI accommodation as a means of countering low occupancy levels in a short season that has therefore facilitated the growth of AI packages to the Greek Islands. It is the increase in AI packages across the Greek Islands that has also changed the nature of the tourism space from that which would be classed as heterogeneous – 'a multi-purpose space in which a wide range of activities and people co-exist. Tourist facilities coincide with businesses, public and private institutions and domestic housing, and tourists mingle with locals' (Edensor, 2001:64), to one which classed as enclavic, where tourists can remain in their resort bubble never interacting with hosts outside of the resort itself if they so choose.

Tsartas (2003) also stresses that other social changes, particularly in Greece's insular regions, have also been affected mostly through the development of tourism in these regions. He has found that social upward mobility rests less on education and more on the rise in income from employment in the Greek tourism sector, particularly for men. For young people and women, this is more noted in the insular regions of Greece where employment opportunities outside of the tourism sector are limited for these two groups who seem to draw the most benefits from the socio-economic changes brought about by a strong tourism economy, which is also perceived as a prestigious sector within which to work. Women now have entry pathways to employment and opportunities for socialising that may not have been open to them in the past. Young people may view tourism developments positively due to the economic benefits it brings along with modernisation of their environments. However, while, 'on the one hand, local people resit typification as passive providers of fun, goods and services to the all-powerful and influential tourists', in places where 'tourism is business ... local people can be seen as prioritising economic gain over maintaining local traditions' (Jaworski *et al.*, 2003:159). Tourism benefits are also weighed by the hosts in these regions against perceived adverse impacts of tourists from countries with different cultural and social norms. This leads to tensions within host countries that are happy for the tourists to leave at the end of the season, but concerned about whether or not they will return again the next year and continue to contribute to the hosts' economy.

It is pertinent to note that "local" people are now more exposed to the archaeologies of tourism – to more knowledge about their locality, their past, geography, economy, literature, nature and so on. And because it is more meaningful to them, it may have all sorts of political and cultural ramifications' (Franklin and Crang, 2001:9). It would therefore be unsurprising to

find the Greek hosts's gaze unaffected by political issues, especially at a time of global economic crisis that is having a particularly profound effect on Greece, a nation facing difficulty coping with repaying multi-billion Euro bailouts from the European Union and International Monetary Fund.

The growth of the All-Inclusive phenomenon

The first All Inclusive (AI) model in the UK is deemed to have originated in Barry Island, a South Wales seaside resort, home to a large Butlin's holiday camp open between 1966-1986 which provided cheap holidays for the British working classes (Anderson, 2010), and, co-incidentally, is the hometown of the author of this paper. Contemporary AI resorts tend to dominate Caribbean and Mediterranean destinations (Anderson, 2010; Anderson, Juaneda and Sastre, 2009), and range from the cheap holidays meeting the needs of working class markets to those offered by luxury tour operators (Brown, Hassan and Teare, 2011).

In general AI packages are more the norm than the exception for tourists from Hong Kong (Armstrong and Mok, 1995; Heung and Chu, 2000; Lo and Lam, 2004; Wong and Kwong, 2004); Americans tend to go all-inclusive to destinations such as Jamaica and Cancun in Mexico (Boxill, 2004), and tourists in general tend to go AI when travelling to destinations such as, for example, the Caribbean (Issa and Jayawardena, 2003) where alternative types of package choice are limited.

Caribbean destinations tend to offer a more expensive AI holiday than one in Europe, but these destinations may not be as safe for visitors to venture outside of the AI resort (George, 2010) compared to many European destinations such as the Greek Islands where tourist safety concerns are not the primary driver of establishing AI packages. Tourists can therefore be motivated to go 'All Inclusive' in order to control holiday budgets through knowing in advance how much a holiday will cost, and because many AI resorts offer a wide range of facilities and entertainment that are suitable for families (Anderson *et. al.*, 2009).

Tourists may also be encouraged to take AI packages when travelling with particular tour operators, for example Club Med, SuperClubs, or Sandals (Issa and Jayawardena, 2003), and, from 2012, AI will be the only choice of package when travelling from the UK with *First Choice*.

Interestingly, the UK and Germany that provide the key source markets for Greek tourism also provide the leading markets for AI holidays (Anderson, 2010). Referring to the way conventional package holidays are presented to British viewers in television holiday programmes, Jaworski *et al.* (2003:156) found that:

'the safest option most strongly associated with the "sun and fun" holiday travel is the package holiday where contact with local people is reduced to a necessary minimum. There, in the safety of one's hotel and the poolside, most of the people around are fellow-tourists ferried on the same charter plane, holiday reps from the holiday company, and a few local waiters, receptionists, chambermaids, shop assistants in a souvenir shop, and so on'.

The AI resort therefore provides the ultimate enclavic tourist space. 'Shielded from potentially offensive sights, sounds and smells, these 'environmental bubbles' provide in-house recreational facilities, including displays of local culture' (Edensor, 2001:64), yet where, also

‘in order to maintain a clear spatial boundary, local workers are excluded’ thus limiting even further the potential for interactions between host and guest. In considering the way tourism is constructed and represented in travel writing, Galasiński and Jaworski find that:

‘by constructing foreignness as “tame” and the local Other as predominantly in a serving position vis-à-vis the tourist (either as an object of observation or as helper), these narratives establish a relationship of power between the tourist and the “native” and legitimise the tourist enterprise as mainly asymmetrical and unbalanced ... giving the tourist the *right* to go “out there” and to enjoy the country not as a place where a society goes about its life, but, rather, as a tourist attraction’ (2003:147).

Kennett-Hensel, Sneath and Hensel (2010:148) has found that many tourists want to experience the ‘real’ destination ‘that exists outside walls’ of the AI resort. Jaworski *et al.* (2003) considers the authenticity of the tourists’ experiences, identifying a ‘continuum of front- to back-stage regions of the host culture, i.e. from relatively inauthentic to authentic experiences respectively’ (p157), noting that the host also plays a significant role in choosing which backstage elements will be displayed. However, Jaworski *et al.* also found that British television programmes focusing on the more conventional package-type holidays, ‘seem to imply that tourists need have very little or no contact with their hosts, who can thus be eliminated from the tourist experience’ (2003:159).

While AI has provided many benefits to tourism on islands such as Jamaica that may have had difficulty attracting risk-averse tourists prior to the growth of AI resorts due to perceptions of high levels of crime and low levels of tourist security, ‘the rapid growth of the all-inclusive, which constitutes a significant proportion of the rooms, is probably preventing other aspects of the tourism industry from growing’ (Boxill, 2004: 270). Crotts (2004) proposes that some of the motivations for tourists to use all-inclusive packages can be understood by their desire to reduce perceived risk where cultural distance between their own and the hosts’ country is high, and believes that frameworks such as that proposed by Hofstede to measure cultural distance can be useful to highlight cultural distance. Indeed, a comparison of European countries such as the UK and Germany as the home country of tourists to the host Greece does show differences on all of Hofstede’s dimensions (<http://geert-hofstede.com/countries.html>) (power distance: UK 35, Germany 35, Greece 60; individualism: UK 89, Germany 67, Greece 35; masculinity: UK 66, Germany 67, Greece 57; uncertainty avoidance: UK 35, Germany 65, Greece 112). However, neither Germany or the UK score as high as Greece on the dimension of uncertainty avoidance, and while Germany’s score on this dimension is higher than that of the UK, neither score would seem to be so high as to fully explain these tourists’ motivations to take AI holiday packages in Greece and its insular regions.

On the one hand, AI can be seen to offer a great advance in broadening choice for tourists, but on the other hand, the increase of AI resorts that set up in mature destinations has faced much criticism. Some AI operators mitigate this by ‘purchasing both consumable and “hard goods” from local businesses, by engaging local businesses when providing trips and excursions, including trips to local markets and craft producers, and offering space within the resort for local vendors to sell their wares’ (Issa and Jayawardena, 2003:169). However, there remain many criticisms of the AI concept, often based upon the low tourist spend in the wider destination outside of the AI resort (Anderson, 2010; Issa and Jayawardena, 2003) and the repatriation of profits from the host country to either the home of the package tour operator in the tourists’ home country (Anderson, 2010), or to a third country which may be the home to the owner of the AI resort itself. Of relevance to this study is the question of the continuing

relevance of the host / guest dyad when boundaries are blurred between the more traditional definitions of host and guest (Bell, 2009) when for example, to a local (host), the non-local owner of an AI hotel could be considered to be as much of a guest as the tourist, whereas the tourist (guest) may perceive both locals and non-local owners of hospitality businesses to be hosts. As stressed by Boisen *et al.*, (2011:136) ‘the notion of competitiveness is no longer bound to policies of national competitiveness; it now affects almost all aspects of places’. Thus the growth of AI is also causing competitive tensions between tourism businesses within resorts in tourism destinations such as Corfu. Indeed, Chalkiti and Sigala warn that,

‘Due to the dependency of Greek tourism enterprises on mass tourism controlled by operators, tour operators constantly pressure for price reductions and for more and better customer services. The provision of all inclusive packages at several destinations drive many times small businesses towards economic recession and eventually seizing of operations’ (2010:340).

Anderson (2010:6) also identifies that AI ‘limits local participation and interaction of tourists in local community; Eliminates money incentives for workers; [and] Potential for linkages outside of the hotel (e.g. taxi drivers, restaurants) can be limited’. Koc (2006) similarly notes the criticisms of the AI phenomenon based on the potential negative impacts to local businesses in a study of AI pricing systems in Turkey. Cabezas (2006) further found negative effects of the growing AI phenomenon in Cuba for workers in these resorts. With specific reference to a number of African nations, Ashley, Boyd and Goodwin (2000) also note the issue of limited access to the tourism market for the poor in many countries where the all-inclusive phenomenon exists, highlighting the Gambian government’s decision to ban all-inclusive packages in response to local demands. The charity *Tourism Concern* (2012) also questioning the decision of *First Choice* to offer British tourists only AI packages, goes on to identify some of the criticisms levied at the AI phenomenon in various countries. For example, in Majorca, AI has been ‘blamed for loss of local business’; ‘only 10% of tourist spend from all-inclusive holidays found its way into local economy’ in certain resorts in Turkey; AI beach holidays ‘contributed least economic benefit’ in Mombasa where 87% of tourists go on all-inclusive holidays and yet over half of local people live on less than \$1 a day’; in Jamaica ‘all-inclusive hotels attracted tourists in the short term but blocked development of other types of tourism, leading to increased tourist harassment’, AI in the Dominican Republic has been blamed for ‘restaurant closures and increased negative attitude towards tourists’, while in Goa, ‘local taxis and guides losing business to all-inclusive resorts’ that promote enclavic tourism.

‘All-inclusives can alienate tourists from the destination they are visiting and the people who live there. This can hamper positive cultural exchange, while allowing resentment to build amongst local people who are blocked from being able to benefit from the tourism economy. This can lead to a vicious circle, in which tourism harassment levels increase (an issue frequently capitalised upon by the hotels themselves), which in turn deters people from leaving the hotels’ (Tourism Concern, 2012).

Method

Two visits were undertaken to the island of Corfu (in October 2011, and in May/June 2012). On each occasion, a small-scale exploratory survey (total respondents n=50) was distributed to a convenience sample of 25 business owners and individuals working in tourism-related services. Data were collected from a range of resorts in both the North and South of the island,

and also in the main town. This survey used a 5 point Likert scale to highlight some of the issues of importance to Corfiot hosts in response to the growth of AI resorts on the island.

Further qualitative data were gathered in May and June 2012, where 10 in-depth interviews were undertaken in order to understand the the Corfiot host's gaze on all-inclusive tourists in general, and tourists from Britain in particular.

The survey was in English, and was distributed in paper copy. Many local respondents have an excellent level of practical (spoken) English, but are not good at reading English. For this reason, on many occasions it was necessary for the researcher to read out the questions to the respondent and to complete the survey on the respondent's behalf, which was taking up to an hour for each survey, or to leave the questionnaire with the local respondent until a native English speaking member of their staff helped complete it. This had two unintended consequences: Firstly, this meant that, due to the additional time it took to gather this data, fewer questionnaires were completed than originally hoped for; however, secondly, it meant that the researcher spent more time with individual business owners and others working in tourism related services, leading to a build-up of rapport that facilitated easier gathering qualitative data from depth interviews with many individuals whose responses therefore also inform the qualitative data presented.

Findings and Discussion

The majority of business owners and workers surveyed in Corfu had been involved in working in tourism related businesses for over 20 years (46%), with a high proportion (22%) being involved for over 11 years, and 32% involved for up to 10 years. 54% of respondents were local Greek Corfiot people, 30% were British people who either owned or worked in tourism related businesses, and a further 12% were other nationals. These included a holiday rep working on the island for the season, but the other foreign nationals had married local people and were resident in Corfu. Only 2 of the accommodation provider businesses offered AI packages, accommodation providers also included those offering self-catering accommodation. Other hospitality industry businesses included tavernas, restaurants and bars. Retail businesses included those selling food and drink, and souvenirs. Business owners of other tourism services, including car and bike hire, trips and excursions, and entertainment providers also responded to the survey.

It must also be acknowledged at the outset, that with regard to the analysis of qualitative data, if a host said that there are 3 hotels in his town that accommodate 2,500 guests, and that these have gone over to offering AI, and that is why his town is dead, that is what will be presented here rather than the researcher's independent efforts at verifying such information. While this may lead to an article that could be accused of being overly-subjective, this article is about the hosts' gaze, and therefore it is the hosts' perceptions that are equally as valid, if not more so, than any basis of this perception in reality.

As the qualitative data were gathered only a few weeks before the most recent elections in Greece that focused on the prospective government's response to the financial crisis and Euro bailout, and also relatively early in the island's tourism season, it is unsurprising that the hosts' gaze was not only on tourists, but on tourism in general, and was also falling on politicians in Greece, in Corfu, and wider across the European Union. As Corfu's economy continues to rely so much on tourism, it was also unsurprising to find high levels of political awareness among those who participated in this research. All of the local business people spoken to during

May/June 2012 knew of Angela Gerekou, the former Minister for Culture and Tourism. This may be because she was born on the island, but it could equally be explained because the business owners were very aware of political issues, and also happy to offer opinions as the issue is so meaningful to them (Franklin and Crang, 2001).

When the local hosts' gaze was specifically directed at tourism, this gaze was also on other tourist businesses, either in the guests' country (i.e. tour operators), or on other hosts in their own country (i.e. those running establishments offering AI package holidays) that may or may not be local people, thus bearing out Bell's (2009) questioning of the continuing relevance of the host/guest dyad.

One research participant, a local Corfiot who owns a number of tourist focused retail outlets, highlighted some of these political and economic issues. He believes that AI is indeed already an enclavic '*closed economy*' in Corfu.

'We cannot stop the spread of all-inclusive, so we need to work with the hoteliers. Especially the large hotels, they do not tend to be owned by Corfiots. But we must also simplify the processes, work with the laws, and offer solutions to these hotels, not just go to them with complaints and problems ... Everything needs to be taken into account, politics, economics, laws, culture ... People have been asleep, perhaps this crisis will give them a wake-up call'.

Bearing out Tsartas' (2003) view that the Greek island tourism season lasts only a few short months, 80% of survey respondents strongly agreed that the tourism season now is shorter than it was 10 years ago. While recognising that there have been changes to the nature of tourism on the island, 90% of respondents either strongly disagreed or disagreed that tourism in Corfu has actually changed for the better.

One interviewee, a local Corfiot taxi driver, has been driving a taxi on the island for over 20 years. He has seen tourism change over the last 10 years, but even more so in the last 3 years. His view is that people like himself had benefitted from the golden years of mass tourism, but now were reaping the effects of, for example, contributing at least to some extent to the Greek economic crisis by not paying their taxes '*I've only paid tax in the last year*', thereby taking from tourism but not necessarily giving back to help the sustainability of tourism by giving back. He has also noticed that tourism patterns seem to have changed. Although the same tourists may return to Corfu year after year for 10 years or more, where once they came for 2 weeks, some may now only come for 4 or 5 days at a time – for British tourists this has been facilitated by airlines such as Easy Jet offering flexible bookings whereby tourists do not have to book on a flight-only option with a tour operator who flies out only once a week and offers durations of only one or two weeks, so the type and number of independent tourists Corfu can attract easily, and who can spend the money in tourism-related businesses that the Corfiots desperately need will be determined by the airlines and tour operators.

Only 1 respondent did not either strongly agree or agree that there is more AI tourism in Corfu now than 10 years ago; 80% of survey respondents either strongly disagreed, or disagreed that AI is benefitting the local economy, while 96% either strongly disagreed, or disagreed that AI tourism had changed tourism for the better on the island. Moreover, 80% of respondents either strongly agreed or agreed that AI is the biggest problem facing the tourist industry in Corfu. Two respondents also added unsolicited notes to the questionnaire that AI is '*one of the biggest problems*', and that AI '*is not the biggest but one of them*'.

An interviewee who runs a bar in Corfu Town believes not only that AI is bad for the island, but he also firmly blames the government:

'The government in Athens does nothing for local businesses in Hellas [Greece], and even less for local businesses in the islands such as Corfu ... Corfu would be dead by now already if it was not for return visitors who come back to this place year after year.'

After 22 years in business, and a marriage to an Englishwoman, this local man is thinking of selling his land, selling his business, and moving to the UK where, if he needs to, he will seek employment waiting on tables in a Greek restaurant.

The oldest bar in one resort, that has been open since the 1950s, was closed during the 2011 season, and opened relatively late in the season during 2012. As a regular tourist to the island the author has also noticed many tourist related businesses closing down in recent years. One interviewee, a local Corfiot accommodation provider who also runs a tavern is fairly pessimistic, and believes even more businesses in the resort will be closed by next year. Thus bearing out Chalkiti and Sigala's (2010) view that one extreme result of the growth of AI is that local Greek businesses will end up failing altogether and closing down.

There are other negative issues associated with AI tourism and AI tourists that were recognised by the local hosts. One interviewee, a senior member of the guest relations team in a Five Star hotel on the island commented that:

'All-inclusive is not good. This hotel would not retain its 5 stars if it went all-inclusive, nor would it retain its 5 star guests. The hotel would not be able to maintain a high quality of food or branded "blue label" drinks, if it went all-inclusive, it would not be able to keep its a la carte restaurant, it would be overrun with families and children, and be a noisy place. The hotel is very much against the entire all-inclusive concept.'

An unsolicited comment from one survey respondent also noted somewhat more strongly that:

'the standard of AI in the hotels is on Corfu very basic foodwise and I have experienced many complaints about the accommodation but mainly the food is often "inedible", "disgusting", "pigs swill."'

While a former director of an AI hotel in Portugal also noted that the focus regarding food and drink in that hotel was purely about maintaining profit margin, so quality spiralled downwards, the hotel sourced cheaper and cheaper ingredients, and ensured that a meal from one day could last for more days in various guises *'that's why I hired a Brazilian chef – he could make one pasta dish last for 3 days'* by varying its presentation each day. He also identified a practice in Portugal where organised trips sold to tourists via reps in resort were often undertaken using transport run by Spanish coach companies, so even money that was spent by tourists when in resort was repatriated outside of the host country.

As outlined in the review of the literature, hosts on islands such as Corfu tend to prefer foreign to domestic tourists. However, while British tourists are the third most preferred foreign tourists to the island, Tsartas (2003:120) also found that Corfiots consider the British to be 'cheap tourists'. In this survey, 92% of respondents strongly agreed or agreed that there are fewer British tourists arriving in Corfu than 10 years ago, with 72% either strongly agreeing or agreeing that these tourists spend less in resort than 10 years ago. Responses were fairly evenly spread to the statement 'Other tourists spend more than the British', with 22% strongly agreeing, 22% agreeing, 24% of no opinion, and 22% disagreeing. The taxi driver interviewee also commented on preferred tourists to the island:

'now we need people from Finland, Scandinavians, rich Russians – they're the only ones with money to spend'.

While AI can offer a safe option for those who want a 'sun and fun' holiday package (Jaworski *et al.*, 2003) AI can foster an enclavic approach to the tourist experience (Edensor, 2001). Indeed 82% of respondents strongly agreed or agreed that AI tourists do not spend enough money locally, and 80% strongly disagreeing or disagreeing that AI hotels encourage tourists to spend money on other local businesses. While Kennett-Hensel *et al.*, (2010) found that many tourists want to experience the 'real' destination 'that exists outside walls' of the AI resort, in Corfu streets with tavernas, restaurants and bars that used to be filled with tourists during the season are relatively empty. One local interviewee has bars in both Corfu Town and another resort in the North of the island, where, he stated:

'2,500 people are now accommodated in 3 hotels that have gone over to all-inclusive. All-inclusive has killed the town. Imagine when these 2,500 people were all walking down the road in the town and eating and drinking in the town'.

One foreign national interviewee, a rep from one of the large tour operators believes that AI is damaging the local economy in Corfu.

'It's not so bad if there are not so many all-inclusive hotels, but the ones that are all-inclusive tend to be the big hotels that have the highest number of rooms and can accommodate high numbers of guests.'

Unlike *First Choice* that are now only offering all-inclusive holiday packages, the company for which she works offers self-catering, half-board and all-inclusive options to the island. Interestingly, outside of self-catering tourists, she currently has only 1 family that has chosen to stay half-board, all the others have opted to go all-inclusive, even in hotels that give guests the choice.

One host interviewee, a Dutch national married to a local Corfiot, who runs a restaurant, believes that *'in Holland the tour operators tell lies to tourists and tell them, "there is only all-inclusive in Corfu", so that's what the tourists book'*. Her gaze also rests on local workers. She mentioned one large hotel in the resort that had closed down. *'That was all-inclusive, so it was good for us, but the staff were locals, and they haven't been paid'*. She also mentioned another very large hotel in the resort where the staff are not usually employed from the local community, but also noting that *'they don't employ enough staff to properly serve guests to a high standard'*.

70% of survey respondents either strongly agreed or agreed that AI hotels do not buy enough supplies locally. However, it was also recognised by an academic involved in teaching tourism on the Greek mainland, that the issue of local sourcing is more complicated than simply buying AI hotel supplies from local retailers. His view is that a lack of local sourcing is not only an issue that is problematic in AI resorts, a lack of local sourcing is also found in non-AI businesses who buy well known global branded goods (e.g. Lurpak butter) rather than lesser known local Greek brands.

While AI can offer tourists the ability to better manage their holiday budgets (Anderson *et al.*, 2009), the standard of the overall hospitality service may not be good enough to encourage return visitors, something upon which Corfu has relied for many years. Indeed, 70% of survey respondents either strongly agreed or agreed that AI tourists will not stay loyal to Corfu as a

holiday destination. Furthermore, 82% of respondents either strongly disagreed or disagreed with the statement that 'AI is only providing what tourists want, so there is no problem'.

The hosts' gaze also fell on the government in considering responses to the growth of AI across Corfu. 86% of respondents either strongly agreed or agrees that government should discourage AI tourist businesses from setting up in Corfu. Even in such constrained economic times, 64% of respondents also either strongly agreed or agreed that government should do more to help local businesses respond to AI tourism.

Conclusion

This paper has sought to explore the changing nature of the hosts' gaze in response to the changing nature of contemporary mass tourism, particularly contextualised against the growth of AI packages in mature European tourism destinations such as Corfu. The island is experiencing changes in its tourism economy: while tourists from key source markets such as the UK and Germany are still visiting the island, these tourists are also recognised as providing the leading markets for all-inclusive tourism. In Greece and its islands, the mass tourism model upon which it has relied for many years has also facilitated the growth of AI packages, where hotels that once served guests who would spend time and money outside of the hotel on, for example, tavernas, restaurants, bars and shops in heterogeneous resorts, are now offering AI packages that are turning these hotels into enclaves where tourists are not encouraged to spend time and money outside, especially if these tourists have taken an AI package to reduce the in-resort costs once on holiday.

The British remain Corfiots' 3rd most preferred foreign tourists, and comprise between 50-70% of the island's tourists. However, this research showed that the hosts on the island perceive that not only are there less British tourists than 10 years ago, but also that these tourists now spend less money in resort than they have done in the past. The global economic crisis has also made the hosts' gaze look further afield to attract guests from Finland, Scandinavia, and Russia, as these tourists are perceived to have more money to spend than the British.

The hosts' gaze on the AI tourism phenomenon on Corfu tends to perceive it as overwhelmingly negative. Corfu is now peppered with resorts where a wide range of tourist related businesses have closed down, and where streets that once would have been full of tourists are now empty, or the tourists who do wander around the resort do not feel the need to spend money on local businesses when they have already paid in advance to a tour operator in their home country their holiday budget for food, drink, entertainment, and excursions etc. It must be recognised that the rationale for the provision of AI is different in destinations such as the Caribbean or Mexico than it is in mature European destinations such as Corfu, where tourists do not tend to be motivated to purchase AI in order to reduce personal safety risks, rather than being motivated by the costs of the package and the ability to better budget their holiday spending. However, for this reason, it should be easier for local businesses to attract tourists to venture outside of the AI hotel enclave.

This research also bore out the view expressed by Bell (2009) that definitional boundaries between host and guest are becoming increasingly blurred. While many owners of tourist related businesses in Corfu are local Corfiots, some are foreign nationals now resident in Corfu, many being married to local Corfiots. In these cases, while the tourist spend in resort may go to foreign rather than local hosts, the profit does tend to stay on the island of the hosts'

residence. It was also recognised in this research that some of the larger AI hotels, that also therefore tend to have the most negative impact on their local resorts, are not owned by local Corfiot hosts, do not tend to source locally, and do not always employ a local workforce. In these cases, the money spent in resort is even more limited, as profits from the hotel will be repatriated to the foreign home of the foreign host.

While government and hosts of tourism related businesses recognise the need for Corfu, as a mature destination, to amend its tourism product offering, there is concern that the move to AI is not the way forward for the island. However, the island has relied upon mass tourism for many years facilitated by tour operators in key source markets such as the UK and Germany. However, when a tour operator with around 30% of the UK market is now offering *only* AI packages to all of its destinations, including Corfu, it is evident that there is also a need for the hosts to liaise with not only AI hotels on the island, but also tour operators and airlines. As budget airlines offer relatively cheap breaks of flexible durations, there is the ability for the island to attract more independent travellers, who do not wish to take AI packages, and who prefer to book direct with local hosts. The type and number of tourists Corfu can attract easily, and who can spend the money in tourism-related businesses that the Corfiot hosts desperately need, will therefore be determined by the airlines and tour operators.

The issue of government intervention regarding the growth of AI packages being offered to Corfu is not easy to resolve, not only because in such strained economic times, even in countries heavily reliant on tourists to support their economy, government has many other priorities, but also because results from this research show that, although AI should not be encouraged to increase in such destinations, there is more ambivalence towards the notion of government intervention to enact protectionist measures to actively discourage this phenomenon or to intervene in private sector tourism businesses. However, it is evident that the AI model is likely to continue to flourish, so it may be better for government to do their best to encourage more local ownership of hotels converted to AI accommodation, along with local sourcing and engagement of local businesses in supplementing the AI product offering, while also encouraging tourists to become involved in authentic local culture and involve other local businesses, ensuring that the tourists receive the best possible experience while also benefitting the local economy.

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APPENDIX II

What is the future for tourism in Corfu?

A public meeting will be held at 18:30 on 13th March to explore ways the island can restore its place as a destination of choice for UK middle-market tourists.

The keynote address will be delivered by Dr Heather Skinner, Reader in Marketing at the University of Glamorgan, an expert in the branding and marketing of places. Dr Skinner has been undertaking research into the decline in tourism in Corfu, and strategies to overcome this decline. Dr Skinner's presentation will also include results of her research that was presented at the *Advances in Hospitality, Tourism, Marketing and Management Conference* that took place on Corfu between 31st May-2nd June 2012.

Greece is still a popular destination for UK tourists, and the country as a whole rose from 6th place in 2010 to 2nd place (after Spain) in 2011 as UK tourists' most-preferred destination. The British remain Corfiots' 3rd most preferred foreign tourists, and comprise between 50-70% of the island's tourists. However, Corfu is experiencing changes in its tourism economy: while tourists from key source markets such as the UK and Germany are still visiting the island, these tourists are also recognised as providing the leading markets for all-inclusive tourism. In Greece and its islands, the mass tourism model upon which it has relied for many years has also facilitated the growth of all-inclusive packages, where hotels that once served guests who would spend time and money outside of the hotel on, for example, tavernas, restaurants, bars and shops, are now offering all-inclusive packages that are turning these hotels into enclaves where tourists are not encouraged to spend time and money outside. Corfu now has many resorts where a wide range of tourist related businesses have closed down, and where streets that once would have been full of tourists are now empty, or the tourists who do wander around the resort do not feel the need to spend money on local businesses when they have already paid in advance to a tour operator in their home country their holiday budget for food, drink, entertainment, and excursions etc. As budget airlines offer relatively cheap breaks of flexible durations, there is the ability for the island to attract more independent travellers, who do not wish to take all-inclusive packages, and who prefer to book direct with local hosts.

The outcome of Dr Skinner's research will be to help inform a strategy for re-branding Corfu, and re-positioning the island as a destination of choice for the middle market of UK independent travellers.

APPENDIX III

Slide 1

**What is the future for
tourism in Corfu?**

Dr Heather Skinner
Glamorgan Business School

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Slide 2

Background & Context

- Why me?
- Why focus on Corfu?
- Why now?

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Slide 3

Greece as a UK tourist destination

- Overall, Greece is still a popular destination for UK tourists, while it had dropped to 6th place in 2010, it rose to 2nd place (after Spain) in 2011 as UK tourists' most preferred destination

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Slide 4

Problems with Mass Tourism

- Greek islands continue to rely on the mass tourism model that served these destinations well in the boom period of the 1970s and 1980s
- In many resorts little has changed in the offering to tourists since that time

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Slide 5

Decline in mass tourism

- Short 2 - 3 month season in many resorts
- Over-reliance on tour operators
- Low rental fees to accommodation providers
- Lack of investment in improving tourism offering – tourists in 2013 are presented with 1980s resorts
- Hotels easy to turn into All-inclusive
- All-inclusive tourists less likely to return

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Slide 6

Problems for Greek tourism

- The Greek tourism industry employs up to 768,000 people, but the first half of 2012 saw average daily hotel rates drop by 16%, which has led to many restaurants and hotels going out of business.
- International arrivals to Athens have recently fallen by up to 15% as potential tourists worry their holiday would be disrupted by the effects of political, societal and financial instability in the country.

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Slide 7

Preference for All-inclusive

- The UK and Germany that provide the key source markets for Greek tourism also provide the leading markets for All-inclusive holidays

Slide 8

Growth of All-Inclusive packages

- TUI AG Group owns the *First Choice* package holiday brand, which has around 30% of the UK package holiday market. From 2012, *First Choice* offers *only* All-Inclusive holidays to *all* foreign destinations. This is becoming an increasingly attractive option for families on a budget, especially in this time of global economic crisis.

Slide 9

All-inclusive and local economies

- 2009 Travel Foundation data found that:
 - Of the 100% holiday cost spent by an all-inclusive tourist
 - Only 55% was directed to the destination country
 - Only 11% was directed to the destination region
 - Less than 2% was spent in the local resort

Slide 10

All-Inclusive in Greece

- All-inclusive is turning many Greek hotels into enclaves where tourists are not encouraged to spend time and money outside, especially if these tourists have taken an all-inclusive package to reduce the in-resort costs once on holiday.

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What about Corfu?

- Closest Greek island to the UK
- Historic links with UK
- Many resorts on the island continue to attract between 50% - 70% of their tourists from the UK

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My previous research

- Two visits were undertaken to the island of Corfu (in October 2011, and in May/June 2012).
- On each occasion, a small-scale exploratory survey (total respondents n=50) was distributed to a convenience sample of 25 business owners and individuals working in tourism-related services in the North East and South East of the island.

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Respondents

- Majority had been involved in tourism related businesses for over 20 years (46%), with a high proportion (22%) being involved for over 11 years, and 32% involved for up to 10 years.
- 54% of respondents were Corfiots; 30% British; 12% other nationals.

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Changes in tourism in Corfu

- 80% strongly agreed that the tourism season now is shorter than it was 10 years ago.
 - 90% strongly disagreed or disagreed that tourism in Corfu has changed for the better.
- “Corfu would be dead by now already if it was not for return visitors who come back to this place year after year”*

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Tourism patterns

- Tourism patterns have changed. Where tourists used to come for 2 weeks, some may now only come for 4 or 5 days at a time – for British tourists this has been facilitated by low-cost airlines offering flexible bookings.
- The type and number of independent tourists Corfu can attract easily, and who can spend the money in tourism-related businesses that the Corfiots desperately need, will be determined by the airlines and tour operators.

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All-inclusive in Corfu

- 80% of survey respondents either strongly disagreed, or disagreed that all-inclusive is benefitting the local economy, while 96% either strongly disagreed, or disagreed that all-inclusive tourism has changed tourism for the better on the island. 80% of respondents either strongly agreed or agreed that all-inclusive is the biggest problem facing the tourist industry in Corfu.

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All-inclusive and local economies

- 82% of respondents strongly agreed or agreed that all-inclusive tourists do not spend enough money locally, and 80% strongly disagree or disagree that all-inclusive hotels encourage tourists to spend money on other local businesses

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Local views on All-inclusive

- *"It's not so bad if there are not so many all-inclusive hotels, but the ones that are all-inclusive tend to be the big hotels that have the highest number of rooms and can accommodate high numbers of guests"*
- *"2,500 people are now accommodated in 3 hotels that have gone over to all-inclusive. All-inclusive has killed the town. Imagine when these 2,500 people were all walking down the road in the town and eating and drinking in the town"*

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Local views on All-inclusive

- *"the standard of all-inclusive in the hotels on Corfu is very basic foodwise and I have experienced many complaints about the accommodation but mainly the food is often 'inedible', 'disgusting', 'pigs swill'"*
- *"This hotel would not be able to maintain a high quality of food or branded 'blue label' drinks, if it went all-inclusive ...The hotel is very much against the entire all-inclusive concept"*

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Local views on All-inclusive

- *"We cannot stop the spread of all-inclusive, so we need to work with the hoteliers. Especially the large hotels, they do not tend to be owned by Corfiots. But we must also simplify the processes, work with the laws, and offer solutions to these hotels, not just go to them with complaints and problems ... Everything needs to be taken into account, politics, economics, laws, culture ... People have been asleep, perhaps this crisis will give them a wake-up call."*

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Slide 21

Halting the decline: Examples from other destinations

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Malta

- 1,243,000 tourists in 2007 (17% more than 2006)
- 2007 tourism expenditure reached €1 billion
- 1,440,000 tourists in 2012 (200,000 more than 2007)
- 2012 tourism expenditure exceeded €1.3 billion (€272 million more than 2007)

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Malta - Attracting more tourists

- Attracted more low-cost airlines
 - 57 direct routes in 2007, increased to 81 in 2012
- Promoted the island better overseas
 - Especially using the internet
- Diversified into new geographic markets
 - Israeli market up 2,330%; Italian market up 76%; Spanish market up 64%

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Malta – better tourist experience

- Investing heavily to ensure that tourists enjoy a positive experience in return for their money.
- Millions spent in upgrading built heritage, in embellishing public spaces, in creating new visitor attractions and improving the country's infrastructure.

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Malta – results for local economy

- Investment is bringing more repeat visits
- Maltese hotels in 2011 and 2012 had 2nd highest occupancy levels in the EU
- Gross operating profit per available room has increased year to date by 8.1% (5*), 19.2% (4*) and 14.6% (3*) accommodation and is the highest registered in the past 5 years in all 3 categories

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Bahamas

- Grand Bahama island has natural beauty, an excellent warm climate, friendly and hospitable citizens, but tourist arrivals were down, occupancy rates at hotels and resorts were low and there was severe pressure on the tourism industry as a whole.

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Bahamas - Tourism begins at home

- The ethos of this strategy was to promote and expand tourism from within. Its main aim was to encourage nationals of the Bahamas to be tourists in their own country. This not only created an increase in tourism activity but also gave Bahamians a greater appreciation for their country and thus made them better tourism ambassadors and tourism 'experts'.

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Tobago

- 9 all-inclusive hotels account for 33% of total room capacity
- Of the nearly 35,000 holidays in all-inclusive properties each year in Tobago, two thirds (23,000) are to UK tourists
- A significant proportions of total tourist expenditure does not reach Tobagonians, or does not remain on the island for very long. Two main reasons for this are that all payments are made abroad and while most all-inclusive hotels are owned by Trinidadians, only one is Tobagonian-owned.

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Tobago – supply chain problems

- The absence of six critical success factors – competitive price, consistent quality, wide variety, reliability of supply, access to credit facilities and business acumen - were found to be responsible for the poor performance of the local supply chain, giving Trinidad suppliers the competitive advantage over Tobago businesses.

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Tobago – turning things around

- Facilitate business
 - Capacity building, mentoring in business skills
- Farmers and fishermen
 - Gain commitment from all-inclusive hotels, and local restaurants to source local produce
 - Hold weekly markets for tourists to buy direct from growers

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Tobago – turning things around

- 'Made in Tobago'
 - promote local art and crafts and 'local labels' of a wide range of locally produced goods through exhibitions and events in all-inclusive hotels
 - promote local cuisine with locally sourced produce in all-inclusive hotels
 - better information to tourists when produce is locally sourced in restaurants, shops etc

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Tobago – turning things around

- Customer service
 - Hospitality training for local businesses, including taxi drivers, shop keepers, and hospitality staff
 - Broaden excursions for tourists to include visits to local agricultural producers

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What is the future for
tourism in Corfu?

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It's not all bad

- UK tourists still enjoy holidays on Corfu
- Corfu and the UK retain strong links
- There is capacity to grow this market

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However

- Corfu has reached a 'tipping point' where the current decline could become fatal if immediate steps are not taken to halt the decline and turn things around

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Focus on 2 key issues

- Attracting more UK tourists
- Serve them well when they are here to encourage repeat visits and to encourage positive word-of-mouth (word-of mouse)

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Old and current tourism models

- The mass tourism model will not save the island's tourism decline
- The lower end and luxury end of the market are not doing too badly
- All-inclusive holidays are here to stay
- But these serve only one target market

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New tourism models

- Corfu needs to target the middle market
- The independent, free-spirited, UK holidaymakers, who will book accommodation direct with hotels, villa, and apartment providers, and spend more money with local businesses, and on locally produced goods when in-resort

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Niche markets

- Can help extend the tourist season
 - Active tourism & Activity tourism
 - Agro-tourism & Eco-tourism
 - Festival tourism & event tourism
 - Disabled tourism
 - Wedding tourism

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Open for Business

- Attract more direct routes from more low-cost airlines
- Better information about ferries to Corfu
- Resorts need to be fully open for business for the entire duration of the season that is served by all these routes

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Re-branding Corfu

- Re-discover Corfu
- Think you know Corfu? Think again
- Focus on culture, history and heritage
- Focus on freedom, independence, and the positive things Corfu can offer

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Investment in infrastructure

- Improve the roads
- Upgrade 'basic' accommodation
- Improve the overall look of resorts
- Consider a Corfu colour palette
- Re-discover a resort's Corfiot identity

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Communication and co-operation

- Need to gain a better understanding of what UK independent travellers want
- Better in-resort information for independent tourists
- Accommodation providers need to replace the services of the tour company representative
- Support and promote each other's businesses
- Know what is going on across your island

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Internet

- A cost-effective way to attract tourists and help serve them better in-resort
- A single (not privately run) web portal
- Links to all other independent and private sector web pages
- Make it easier for tourists to make direct bookings

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Social Media

- Know what is being said about the island, its resorts, and individual businesses on social media sites
- Co-operate with each other – link to each other's social media sites
- Consider social media training, or facilitate social media champions in each resort
- Consider use of QR/AR

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Learn

- From what other islands have done to turn things around
- From what other resorts have done in Corfu, and from what other businesses are doing to turn things around
- To think positively – it's not too late to turn around the fortunes for tourism in Corfu

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Next steps

- I will provide an outline strategy and toolkit of resources
- This will be provided in both English and Greek and will be made freely available
- But then it's over to you ...

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Σας ευχαριστώ πολύ

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APPENDIX IV

Photographs of the public meeting hosted by the Corfu Chamber of Commerce and the Ionian University 13th March 2013



Mr Matallinos, Vice President of the Corfu Chamber of Commerce, reads the opening address to the event provided by Mr Nikos Dendias, Minister of Public Order and Citizen Protection for Greece, and Member of the Parliament for Corfu



Mr Stavros Katsios, Vice Rector of Financial Management & Development, Ionian Academy, introduces the keynote speaker



Dr Heather Skinner delivering the keynote address on the future of tourism in Corfu



An appreciative audience



Mr Karabatsos, President of the Union of Hotel Managers responds to Dr Skinner's keynote speech



Excellent translation service provided by the Ionian Academy and Corfu Chamber of Commerce



The panel responding to questions from the floor



An honorary award presented to Dr Skinner by Mr Kontos, Vice President of the Corfu Chamber of Commerce



A beautiful book with pictures of Easter in Corfu presented by Mr Metallinos



Presentation of an honorary award for the Business School by Mr Katsios



Thank you so much for my lovely gifts - they are now on display at my University



From left to right: Mr Pantelis Kontos, Vice President of the Corfu Chamber of Commerce; Mr Stavros Katsios, Vice Rector of the Ionian Academy; Dr Heather Skinner, Reader in Marketing at the University of Glamorgan; Mr Pavlos Metallinos, Vice President of the Corfu Chamber of Commerce; Mr Nikos Chirdari, General Secretary of the Corfu Chamber of Commerce; Mr Kostas Karabatsos, President of the Union of Hotel Managers

MAKING ALL-INCLUSIVES MORE INCLUSIVE

*A Research Project
on the economic impact of
the all-inclusive hotel sector in Tobago
for
The Travel Foundation*

Dr Afzal Abdool, *Hibiscus Consulting*
and
Benjamin Carey, *Dunira Strategy*

February 2004

EXECUTIVE SUMMARY

This report explores the economic impact of the All-inclusive (AI) hotel sector on the economy of Tobago and evaluates the extent of trade linkages that support this sector. Further, it makes recommendations on the potential for new linkages to be established and the strategies for strengthening existing ones. It also identifies micro-businesses, which require additional support to facilitate their entry into the hotel supply chain and to increase the spread of benefits from this sector to the wider stakeholder community and host environment.

In order to achieve these objectives, interviews were conducted with tour operators and an analysis of their Tobago programmes undertaken by reference to brochure material and other collateral. A survey of UK tour operators showed that fifteen currently feature package holidays to Tobago. Of the nearly 35,000 holidays in AI properties each year in Tobago, two thirds (23,000) are sold to British customers.

Surveys and interviews were also held with hotel managers, guests, industry businesspeople, government officials, farmers' organisations, local experts and other stakeholders. Results indicated that nine AI hotels account for 33% of total room capacity and directly support 9.1% of employment on the island. Further, British customers in these properties contribute 8.3% of the island's GDP in accommodation costs alone. From our survey of AI guests, it was also revealed that AI tourists spend significantly more money in the local economy than those staying in other accommodation. British customers staying in these hotels and resorts contribute a further 3.4% of GDP simply through their local holiday expenditure. Despite these encouraging signs, it is likely that significant proportions of funds do not reach Tobagonians and otherwise do not remain on the island for very long. Two main reasons for this assertion are that all payments are made abroad and while most AI hotels are owned by Trinidadians, only one is Tobagonian-owned.

One opportunity for stemming this haemorrhage from the local economy lies in reducing imports. Tobago, once a thriving agricultural economy, is no longer self-sufficient in food. Unfortunately, most of the fresh produce needed by the tourism industry is imported from producers in nearby Trinidad and from importers based there. Business links with Tobago suppliers were limited to fresh fish, lobsters and farm eggs. The absence of six critical success factors – competitive price, consistent quality, wide variety, reliability of supply, access to credit facilities and business acumen – were found to be responsible for the poor performance of the local supply chain, giving Trinidad suppliers the competitive advantage over Tobago businesses. Only a few Tobago entrepreneurs have been able to overcome these 'barriers'. In addressing the need to reduce leakages, improve existing linkages and build new ones, the report findings also point to a need to develop more responsive business support mechanisms to enhance the entrepreneurial environment in Tobago.

In light of the findings, this report recommends strengthening of the local supply industry by focusing on agricultural linkages, business development and market orientation and capacity building initiatives. Special emphasis is given to farmers and farmers' organisations which have the potential to develop the competencies demanded by the tourism sector. Additionally, the respective roles and spheres of influence of tourists, tour operators, hotels, destination management companies, government and community organisations are each considered as potential agents of

change in initiating, influencing and replicating desired behaviours which contribute to sustainable practices. This is evident in the several education and awareness projects that are proposed. In order to address the gaps identified, a number of strategies are proposed. Firstly, it is suggested that interventions can be made by reorienting AI properties towards local suppliers. This requires a number of developments in the local business community and in enterprise facilitation and support. Secondly, local enterprises can take advantage of the high local spending power of AI customers by the introduction of demand-driven initiatives. Accordingly, a number of demonstration-type projects are suggested such as 'Adopt a Farmers' Group, aimed at facilitating the nexus between agriculture and tourism, and 'Made in Tobago', a pilot scheme to promote locally made products directly to the tourist market and facilitated by the AI hotels themselves. Other ventures proposed, involve training and mentoring, technical support and multi-stakeholder engagement in the ancillary sectors. Finally, the report identifies some existing businesses, which we believe have the potential to significantly engage in the local hotel supply chain.

RESEARCH BACKGROUND

Since the introduction of the All-inclusive (AI) concept in the Caribbean, and in Jamaica in particular, there has been a growing concern by industry experts and local interests alike about its impact on the local economy. In Jamaica, the model was introduced in response to the high incidence of crimes committed against tourists, and the consequent need to protect them from potential danger. The AI model has several variants, ranging from the very basic to the most comprehensive. A basic AI package purchased by a traveller would include flights, coach transfers and accommodation, including most meals and drinks. At the other end of the spectrum, a top-of-the-range comprehensive product might also include luxury private transfers, accommodation at a five-star resort such as Sandals, spa treatments, sporting activities, sightseeing tours and excursions and more.

What is significant about this arrangement when compared to the non-AI (conventional) product, is that the customer pays for the AI holiday package before leaving home. This means that little of the hard currency (USD and GBP) will reach the destination country - sometimes only enough to settle local expenses incurred by the AI hotel and payable in the local currency. Critics of the AI concept argue that this amounts to a leakage of funds particularly in cases where the hotel or resort is foreign-owned (repatriated profits). An effect of the pre-payment component of AI holidays is that AI guests are less inclined to venture out of their host hotel or to spend on services outside of the AI package, having already paid for much of these in advance. A similar issue also arises in the case of cruise tourism.

Quite apart from the negative impact on the local economy, it is claimed that AI's contribute to alienation of the host population as it effectively restricts the free movement of tourists outside the confines of their hotel and into the local communities. In certain cases, locals may even be restricted from entering the hotel compound. Research shows that the demand for AI holidays is growing globally and the larger European and British tour operators are certainly keen to develop this market, particularly in the Caribbean.

TOURISM IN TOBAGO

TIDCO lists 57 tourist accommodation properties on Tobago. These include guesthouses, villas and hotels, providing capacity of 2,634 rooms and 1.9M bednights. The island therefore has the capacity to accommodate 155,000 visitors each year, using the average duration of 12.4 nights, although actual visitor numbers achieved last year amounted to just 68,000, which equates to 44% occupancy levels across all sectors. However, since occupancy levels in AI hotels are over 70%, even allowing for some exaggeration by hotel managers, the average occupancy level in non-AI properties cannot be more than 35%, meaning that the AI sector, which last year hosted more than 34,000 visitors, takes the lion's share of the market. We calculate that tourism directly contributes 31% of Tobago's GDP and directly supports 26% of jobs; accommodation alone employing 20% of the working population. The indirect benefits are much greater. Based on the data collected, we estimate that every direct job created within the accommodation sector corresponds indirectly with a further two jobs on the island, supporting more than 11,000 jobs in total.

Tobago is highly dependent on the outbound British travel and tourism industry. Whereas 14% of tourism arrivals across the whole of Trinidad & Tobago come from the UK, there is a large imbalance between the two islands with twice as many British tourists visiting Tobago as visit Trinidad. Statistics show that (excluding domestic inter-island tourism) 63% of tourists to Tobago come from the UK, compared to just 7% of tourists visiting Trinidad.

TOBAGO'S ALL-INCLUSIVE SECTOR

This sector is demand driven and is the fastest growing sector in Tobago. All the hotels that offer AI holidays were originally conventional hotels but subsequently converted in response to demand from tour operators' customers. Of the 18 hotels on the island, there are now 9 that offer All-inclusive accommodation, all situated in the more developed Southwest of the island. Five are exclusively AI, whilst 4 remain mixed, offering an AI option to guests, although at least one of these will convert to an entirely AI basis by 2005. In terms of volume, these 9 hotels represent 33% (880 rooms) of the island's total capacity (2634), although our research indicates that only 79% of this volume is currently being occupied on an AI basis, representing 26% of the island's total capacity.

BRITISH TOUR OPERATIONS IN TOBAGO

Of the nearly 35,000 holidays in AI properties each year in Tobago, 23,000 (66%) are sold to British customers. Although some hotels do market themselves direct to British customers, the vast majority of sales are made through tour operator air-inclusive packages. This illustrates the size of opportunity for British tour operators to influence changes that will contribute to more sustainable tourism in Tobago and the spreading of benefits - economic, environmental, social - to the wider local stakeholder community.

DIRECT ECONOMIC IMPACT

Analysis of data provided by hotels and their customers and from official sources gives the following findings:

- **Holiday duration** - The average stay of 13.4 nights reported by the properties interviewed is slightly higher than the 12.4 recorded by the CSO and confirms that virtually all AI accommodation is sold as part of a "2 week package".
- **Seasonality** - 78% occupancy is achieved in AI accommodation during the high season, but this falls to 68% during the low season.
- **Staffing levels** - AI hotels directly employ two staff for each of their rooms. Between them, the nine AI properties directly employ just over 1,800 staff in high season and just under 1,700 in low season, providing an average staff per guest ratio of 1.4 and 1.6 in high and low season respectively. The remarkable consistency across the seasons reflects the decision of some of the larger hotels to "not shed staff" and to retain the majority of them on permanent contracts throughout the year "because [it is] hard to retain good staff". 60% of all staff in AI properties are on permanent contracts. Given that the working population in Tobago is 19,000, this means that AI properties on Tobago are directly responsible for 9.1% of employment.
- **Accommodation costs** - The average contract rate for AI accommodation is £39 PPPN. Multiplying this by the average duration gives an average contribution of £521 simply for the accommodation element of each visitor's holiday. This generates a total contribution of £12.0M by British AI customers on accommodation alone, which is significant, representing at least 8.3% of the island's GDP. Including non-UK customers, accommodation in AI properties contributes £18.2M or 12.6% of GDP, but this in no way corresponds to GNP, since the vast majority of AI capacity is not locally owned.
- **Holiday spending** - The average individual local spend reported by British AI tourists staying in AI properties is £16 per day or £215 per holiday, which amounts to £5.0M or 3.4% of GDP. This includes excursions (79% of respondents), car hire (52%), shopping (47%) and eating out (39%), all providing significant opportunities for local enterprise and benefits.

This analysis confirms the phenomenal importance of the AI sector to the Tobago economy in terms of employment and value, but it also indicates a number of areas, in which there may be opportunities for local tourism stakeholders to grow and expand these benefits.

- ➔ Despite growth in demand, the sector still includes spare capacity, particularly in the low season, and this provides opportunities for growth in supply within existing capacity, although additional unrestricted growth in supply could undermine the economic value of the sector.
- ➔ The size of the sector demonstrates that even a small reorientation towards local suppliers would bring benefits to both the AI sector and the island economy as a whole, but this requires some structural adjustment by suppliers to address the competitive disadvantages mentioned above.
- ➔ The local spending power of AI tourists should not be underestimated and provides tremendous opportunities to develop enterprises for the production and delivery of high margin and/or high demand local goods and services for the benefit of tourists.

Apart from additional employment opportunities, these could also support growth in the local production and delivery of goods and services for the benefit of hosts.

LEAKAGES

The fact that so few AI properties are locally owned means that many potential economic benefits that could reasonably have been expected to accrue as a result of the high proportion of GDP that the AI sector supports means that many will not benefit the host community at all. In fact, many of the potential benefits leak out through ownership dividends and the purchase of goods, plant and services outside Tobago. In order to gauge other economic local impacts of AI hotels, we surveyed a sample of restaurants located in the vicinity of AI resorts. We found that speciality restaurants offering high quality menus and distinctive service remained largely unaffected by the conversion of local hotels to an AI basis. They were also more likely than other restaurants to do business with AI guests from the more exclusive resorts, such as Hilton and Coco Reef, suggesting that these customers are not price-sensitive. We found that it was the restaurants at the lower end of the market, which could ill afford to, that had suffered most from conversions.

LINKAGES

It is clear that linkages with local suppliers are poorly developed and that there is huge potential for extending these links. A most encouraging finding was that all hotel managers expressed keen interest in working towards increasing their levels of local inputs and in striking new alliances with suppliers in their local community. Virtually all AI hoteliers expressed strong willingness to purchase their goods locally if prices were competitive with Trinidad. Presently, Grafton Beach Hotel and Le Gran Courland Spa Resort (partner hotels) have developed links with a few local suppliers to deliver a variety of services to their guests. The hotel takes a commission on tours sold and offers discounts on dinners at selected restaurants when certain tours are purchased. Additionally, they host a craft market on property once weekly showcasing the work of four local artisans who also have the opportunity to sell their wares. At any one time up to fourteen local entertainers are employed at these hotels.

PROGNOSIS

Arising out of the interviews with hotel executives, it became evident that the industry in Tobago is headed for unprecedented growth in AI resorts. The new Hilton Tobago currently sells 60% of its capacity on an AI basis, but is working toward full conversion to AI by 2005. Coco Reef Resort & Spa, Le Grand Courland Spa Resort, Grafton Beach Hotel, Inn on the Bay and Rex Turtle Beach have already completed their conversion and others are poised to follow. In the absence of Government intervention by way of policy directives, it seems that this trend is certain to continue at a rapid pace. In view of this, the socioeconomic implications need to be studied and addressed with urgency. Whilst the current AI capacity brings tremendous benefits, unchecked further growth without appropriate infrastructural developments and the reorientation and growth of local support sectors could lead to serious social, economic and environmental problems.

CRUISE TOURISM

This is essentially an AI product and as such, its impacts and the trade linkages it generates are akin to the AI resort experience. Historically, cruise tourism has not been important to Tobago. This has been so even after the construction of deep-water harbour facilities at Scarborough during the 1990s. Annual cruise passenger arrivals have fluctuated between 10,000 and 20,000 with the major beneficiaries being the Port Authority (mainly through Head Taxes and Port charges), local ground operators and taxi drivers. Although available, the port's bunkering facilities (supply to ships of fresh water and marine fuel) are seldom used and when water is purchased, it incurs a net loss as the marketing and distribution costs far exceed the revenue.

Due to T&T's competitive advantage in oil and energy, fuel prices are attractive but have not been aggressively marketed to the cruise lines. There are no organised chandler services on the island and any requests for provisions are usually co-ordinated by the ship's local agent. Historically, demand has been negligible, ad hoc and limited to fresh local perishable produce such as lettuce and other leafy vegetables. Experience has shown that ships are more likely to request provisions if they are en route to South America. The cruise supply chain typically operates through traditional links with large suppliers located at home ports in Miami, Florida and San Juan, Puerto Rico, from which top up supplies are air freighted to ports on the cruise itinerary.

POLICY CHANGES

The THA has recently taken a policy decision to boost cruise tourism by investing in an extension to the pier and a shift of marketing focus from small and medium sized vessels (700-1000 passengers) to the large ocean liners (2000+ passengers). While this change is intended to increase benefits, it is likely to have a severe impact on the local environment and put the limited local infrastructure, including ground transport, under immense strain. Already, in the absence of an adequate public transport system, when two ships call on the same day, locals find it difficult to get *route taxis* (shared taxis), the main form of local transportation.

ECONOMIC IMPACT

Cruise tourism has not made any significant impact on the local economy of Tobago. At USD5 per passenger (Head Tax) plus a surcharge of USD0.30 per passenger on an organised tour, the Port Authority of Trinidad and Tobago (PATT) reports that each year it collects less than £50,000. Historical records show that on average only 30% of passengers purchase organised tours with a further 20% hiring taxis. Tour prices range between USD20 to USD50, averaging £19. This means that, with an average annual volume of 14,924 passengers and after deducting the PATT levy, only £118,000 is spent by cruise passengers on organised tours and taxis, bringing very little benefit to the local economy. Craft sellers, local entertainers and restaurants receive little or no benefit, unless the tours are specifically structured to include them.

OPPORTUNITIES

There is no doubt that there is scope for improving economic activity in the local supply chain for cruise operators, but neither local stakeholders nor - since the parting of Airtours and Carnival at the end of the 1990s - the British travel industry have little real influence on this sector. Any intervention must take account of the reality that the principal stakeholders are large American companies that own, market and operate these cruises, and whose interests are often vertically integrated with supplier companies in the metropolis. Previous attempts at the regional level to negotiate terms and conditions with the Florida Caribbean Cruise Association (FCCA) have achieved little or no success.

In view of the THA's decision to promote cruise tourism more aggressively, greater attention needs to be given to the impacts that this change is likely to have on the physical and social environment and the net cost of investing in this area of tourism. Certainly ground operators could be more innovative in the design of their tour packages, incorporating more aspects of local culture and new opportunities for economic activity. However, compared to other tourism sectors in Tobago, a cost-benefit analysis of historic investment suggests that the cruise sector should not be treated as a high priority. There also do not appear to be viable opportunities for developing significant trade linkages with local agriculture.

KEY OBSTACLES TO PROGRESS

At the macro level, the Business Development Company has identified six key areas that can all be addressed through a combination of facilitation by local agencies and the development of a more collective and co-operative approach by local businesses.

Seasonality of production: This can be addressed by assisting farmers in rotating their crops and by providing facilities for preservation and storage of surplus fruit and vegetables during the season, in preparation for out-of-season processing.

Economies of scale: Raw materials are often sourced in uneconomically small quantities. This reflects the failure of small operators (farmers, agro-processors, etc) to achieve economies of scale by working collectively to purchase inputs in more economic quantities without abdicating comparative advantages. An example cited was the packaging of fruit preserves for the tourist market where suitable bottles were being sourced from England at significant cost, so limiting the volume that could be purchased. In such cases, it would be advisable for producers to pool their resources together and purchase in bulk. This could be easily achieved if for example they were to establish themselves in an appropriate form of co-operative or association. In the case of farmers, the Marketing Department of the THA has already agreed to provide free transport for bulk purchases made in Trinidad, but there is scope to provide this assistance to other initiatives that local businesses identify as priority opportunities.

Training needs: There is currently a lack of management and enterprise training capacity to address skills shortages and this is compounded by poor technical know-how in production methods and

marketing skills. This can be addressed with training, which must be practical and flexible enough to meet the unique needs and competencies of each organisation or individual.

Market Intelligence: In the export industry, this is critical. With regard to the hotel industry, farmers and other suppliers need information on the quantity, quality, variety and usage of goods in demand in order to plan production, harvesting and distribution schedules. This synchronisation of the supply and demand parameters needs to be responsive to the dynamics of the tourism industry on a year-round basis.

Low awareness of financial products: Many businesses are unaware of funding sources available. For example, CARTF is an EU-funded programme that provides funding for research and training to facilitate access to up-to-date market information for agribusinesses in the Caribbean. With a deadline of March 2004, only a few Tobago entrepreneurs have so far applied for assistance under this scheme.

Food production regulations: Although tour operators are increasingly required to show that their suppliers adopt more stringent health and safety standards (including those of their suppliers' suppliers), a lot of local production fails to satisfy the international standard, Hazard Analysis and Critical Control Point (HACCP). This requirement is likely to become mandatory in the future for all suppliers regardless of size. This represents a significant barrier to entry, because the costs associated with adopting HACCP for a micro business could be prohibitive and, without some intervention, could lead to many small suppliers being excluded from the tourism supply chain.

OPPORTUNITIES

WHAT TOURISTS WANT

To be sustainable, every project must address the needs of all stakeholders. To be successful, any initiative in tourism must ultimately also respond to customer demand. We have found that the majority of tourists staying in AI properties on Tobago are customers of British tour operators. This means that their continuing satisfaction will be an important consideration when assessing projects for prioritisation and implementation.

Our survey of AI guests reported above found that 90% of customers were satisfied with the choice of local food available to them in their hotels. However, we were unable to ascertain to what extent they were encouraged by staff to try these foods or to what extent they actually sampled local dishes. Research elsewhere has shown that food is one of the most important elements in the AI package and hotel managers reported a high incidence of repeat business (indicating loyalty as a result of high levels of satisfaction). Therefore opportunities to spread benefits to the wider stakeholder community must build on the existing product framework, particularly the food element, rather than trying to introduce any new elements that have not been tested locally.

Opportunities therefore lie in two key areas:

- ➔ **Reorientation by AI properties towards local suppliers**, but this requires a number of developments in the local business community and in enterprise facilitation and support.
- ➔ **Demand-driven initiatives by local enterprises** to take advantage of the high local spending power of AI customers.

ABC OF RECOMMENDATIONS - PROJECTS WITH POTENTIAL

Each of the projects that we recommend as having potential falls into one or more of the following categories.

- ✓ Agricultural linkages
- ✓ Business development and market orientation
- ✓ Capacity building

We have not suggested priorities, as we believe that this requires further consultation with the local stakeholder community through the local forum (Tobago Steering Committee) that TTF has established.

These projects are indicative. Although our discussions have met with considerable enthusiasm from all stakeholders, the successful implementation of any project will rely on it being planned in close consultation with all relevant stakeholders. Principal stakeholders are identified below.

PROJECTS WITH AN ECONOMIC FOCUS

Facilitate Business

Those who can Teach – a mentoring project for budding businesses

Focus on capacity building in relation to business skills. Supplement this with a mentoring scheme to coach entrepreneurs in hands-on approaches to planning and managing their own business activities and in understanding the business environment. It is critical that individuals start seeing their activity as a business and not merely as a hobby. Business development professionals in Tobago indicated that this shift in thinking continues to be a huge challenge for many people involved in small and micro businesses.

Stimulate Economic Activity

Stakeholders: Division of Culture and Community Development / TTHTA / BDC / Tobago Art Society

Made in Tobago - Local Art

Arrange to have various hotels host a cultural evening on a rotating basis offering local artists the chance to show their work. These exhibitions of local art could be extended beyond paintings and sculpture to include fashion shows to promote the work of local designers.

Made in Tobago – Local Cuisine

In a similar fashion, hotels can be encouraged to promote local foods to their guests by inviting them to dine 'Tobago style'. A local culinary expert has already been identified to develop recipes which would utilise ingredients supplied by the Farmers Associations (ground provisions, vegetables and fruit), whilst the *House of Angostura* has expressed an interest in participating in the programme. The project aims to promote local food by presenting it in appealing ways while stimulating hotel demand for fresh produce such as dasheen, cassava, eddoe and breadfruit.

Made in Tobago - Local Labels

Continuing in the same cultural theme, a selection of locally made products of high quality may be displayed for sale including locally produced music, condiments, crafts and clothing. Featuring items made in Tobago, such an initiative could be promoted by both tour operators and hotels to their customers. These events can take place either independently or combined in a single evening's activities. All three cultural ventures can be promoted through tourist brochures, local resort representatives, the hotel managers' welcome cocktail party or other media such as in-flight videos.

Create new businesses

Business opportunities exist for private enterprise to provide **facilities for packaging**, including vacuum packaging and labelling of produce. Additionally, there is a need for a central chilling facility to retain freshness of produce and prolong shelf life. These opportunities could be developed by the proposed marketing company. Alternatively, farmers' associations may qualify for grants to establish these types of facilities but may need to work with local businesses to manage and operate the enterprises.

A local opportunity exists for **mobile greengrocer** services to satisfy demand for weekly and top-up supplies of fresh produce to some hotels and most restaurants, which prefer to have the goods delivered to their doorstep. Such an entrepreneur would routinely source his supplies from the farmers' wholesale market, or from the proposed marketing company established to deal with grading, packaging, and distribution. Alternatively, trade in fresh produce with the hotel and restaurant sector may be handled by establishing a joint venture between farmers groups and a distribution company.

Other opportunities exist (particularly for women) to offer services such as **hair braiding and manicure and pedicure treatments**, although particular attention would need to be given to training in health and safety standards. It is not recommended that these services be allowed to operate on the beach. However, these services could be offered to those hotels that do not have spa facilities and on a callout basis. Further, based on the results of the AI customer survey, a whole host of micro and small business opportunities (including cottage industry) can be developed around the range of products and services which AI customers are likely to buy. These include jewellery, paintings, duty-free alcohol, carvings, T-shirts and leather craft. Stakeholder organisations should take steps to promote these opportunities and to provide appropriate training and other support for interested individuals.

PROJECTS WITH AN EDUCATIONAL FOCUS

Build capacity in farmers' organisations

The farmers' associations' priority needs are in business management and training and more flexible access to credit for working capital and irrigation facilities. The fisherfolk association's priority needs are in business management training, boat repair facilities and engine repairs, and more flexible access to credit. There is also a need to monitor the performance of the farmers' wholesale market and to work with the farmers' organisations to provide the necessary support to make it sustainable.

Develop linkages with farmers' groups

Adopt A Farmers' Group

Establish contracts between farmers and hotels. As in the case of *Sandals* (the renowned chain of AI resorts), in *adopting* the farmers' association, the hotel commits to purchasing certain quotas of fresh produce (e.g. lettuces) of certain quality and for supporting the farmers in some way, for example by providing seeds. The farmers, if they anticipate that they are unable to fulfil their commitment, are obliged to give two weeks advance notice to the hotel.

Educate farmers

Farmer education to assist farmers in such things as the pricing of inputs, the mechanics of production, grading and post harvest handling techniques.

Support farmers in the field

TTF may wish to consider retaining a **Field Officer** to work exclusively and dedicatedly with a core group of hotel-contracted farmers to provide practical support to farmers on a one-to-one basis and on a day-to-day basis to deal with production issues. This individual can also serve as an integrator, working with farmers and hoteliers with a view to building trade relations and the planning, management and synchronisation of demand and supply flows.

Alternatively, an AI hotel may retain a **purchasing and extension officer** who is agro-focused but also able to work with other organisations. The impact of Sandals in St. Lucia employing a local purchasing / extension officer - Eustace Vitalis, has been impressive. His work has helped the development of farmers groups. This in turn has helped both parties - reduced Sandals' costs of managing multiple trading relationships and built the strength of this group to begin trade in other sectors.

Hotel Incentive Programme

The relevant Ministry of Government with the support of the THA, should consider offering a regime of incentives to AI hotels which are committed to supporting local suppliers. This would entail a change in policy, perhaps, amongst other measures, making local purchases tax-deductible. A potential partner in this pro-poor initiative is Oxfam Great Britain. A similar project is being pursued in Barbados by OGB.

Contracting for local value added

At the macro level, the private sector should lead by formulating policies that would encourage Tour Operators to consider entering into negotiations with their hotel suppliers to deal with such issues as hiring of local labour and purchasing of goods and services from local suppliers. While these new 'demands' may appear onerous at first, they would contribute toward fair and ethical standards in the industry, and redound to the benefit of the destination communities in the long term. This project and the previous one (Hotel Incentive Programme) are complementary, representing a two-pronged approach from both the demand and the supply sides of the industry.

Hotel purchasing

The opportunity exists for an AI hotel to contribute to community development by purchasing products such as food and personal hygiene products e.g. soaps from local micro-businesses. Information on business opportunities for communities is available from IICA (Inter-American Institute for Co-operation on Agriculture). Although a business venture to the hotel, this initiative indicates their level of Corporate Social Responsibility.

Educate taxi drivers

Support the training of taxi drivers by providing information and tools on the market perspective (what British visitors want and expect) as well as feedback on visitor perceptions of our taxi services. This component (customer needs) has not been given adequate attention in training programmes and is a crucial omission in light of the fact that taxi drivers can be important local ambassadors for the destination.

Encourage environmental awareness

Recycling projects such as composting of kitchen waste for organic fertiliser, glass and paper recycling and separation of household waste. Encourage organic kitchen gardening at home. Use the local media and competitions to stimulate interest and build awareness particularly among school children and young people.

Make visitors aware

Find creative and interesting ways to promote local goods and services through tour operator representatives during weekly briefings conducted for new arrivals. Include environmental awareness tips and invite contributions to certain local charities that make a genuine difference in the lives of local residents. Make visitors aware of our local conditions e.g. water shortages in the dry season, lack of adequate infrastructure, and such little known facts like premium quality and organically grown vegetables and fruits may have a less-than-perfect appearance, due to climatic conditions, no pesticides and lack of 'dressing'.

PROJECTS WITH A TECHNICAL FOCUS

Establish a market information system and a monthly farmer/ hotelier exchange forum - To complement the proposed Field Officer's work, this would include a database of all farmers' details such as crops under cultivation, when planted, expected harvest dates, expected yields, grade (quality), etc. This would be a valuable tool to aid in planning as well as marketing. Having developed the appropriate software, CAMID may be able to provide some resources to establish such a system. The establishment of a forum would present a unique opportunity for farmers and hoteliers to meet and exchange viewpoints, build business relationships and even resolve issues.

Encourage innovation in tour design - Encourage more innovation in the design of tours to include more aspects of local heritage and culture, whilst at the same time strengthening community-based organisations' capacity to participate in this venture. Tours could include for example, visits to local agricultural businesses and farms with interpretations provided by local tour guides explaining the special attributes of Tobago farm produce. Products such as herbs, etc. could be sold to tourists immediately. A successful case example is the St. Lucia Heritage Tourism project, which has actually developed new tours that AIs have included as they are comfortable that they meet their standards. These tours are community-owned.

Assist tour guides - Some hotels are known to use staff members and others as tour guides instead of hiring trained tour guides from the Tour Guide Association. Such practices frustrate all attempts to develop healthy relations with the local community. Assistance is therefore needed to:

- Develop and offer training workshops in foreign language skills
- Produce a brochure listing certified tour guides and encouraging tourists to use their services
- Encourage hotels to display these lists of certified guides at reception
- Encourage tour operator representatives to provide this information to guests at briefings
- Develop a forum for tour guides and hotel staff to meet
- Design, develop a website for the Tour Guide Association and provide training for ongoing maintenance
- Develop a reward system to motivate and encourage excellence in service delivery

Promote local handicraft - The Tobago Handicraft Association has twelve active members. Together they produce tie-dyed, batik and hand painted fabrics, basketry and other crafts. Encourage taxi drivers and DMCs to include the craft centre at Mt. Irvine on their tour itinerary as far as possible. Assist the association in sourcing bulk supplies of Sea Island cotton (not available locally) and cold water dyes at more competitive prices. Facilitate their participation at local trade fairs and advertise in the local tourist publications. Teach them how to display products more attractively and provide training workshops for new entrants.

Develop local entertainment - Support the present planning and organisational efforts of stakeholders in assisting the local entertainment industry to become proactive and professional. An essential first step would involve conducting an inventory of entertainment providers and services on the island and an assessment of their needs.

APPENDIX VI

Arillas – a case study

Arillas is a quiet resort on the north-west corner of Corfu. In Arillas there is a growing consciousness that we need to do things differently and take matters into our own hands.

The players

Cultural club

In Arillas we have a very active cultural club with more than 120 members that organises many things and brings together many people. Many things have been organised in the past, such as music lessons and concerts, athletic events, painting lessons and much more. Currently there are folk dance lessons for children and adults, first aid (CARPA) lessons by our local doctors, aerobics and yoga classes on a weekly basis. The club also organises 4 festivals during the summer with around 500-1000 people attending each festival. The last couple of years the club has also been active in the issue of waste disposal and general aesthetics of the village. We have built little “huts” for the garbage bins to take them out of sight, we have argued against the cementisation of Arillas beach and last year we cleared and signposted an 8 km circular footpath going from Arillas beach into the hills above the village.

The club has a directing board but all meetings are open to the public and there is a culture of “direct democracy” in the sense that every opinion and objection is discussed and we try to reach consensus. Not always possible, but the effort counts. The money we make from the festivals, along with a lot of volunteer work is used to improve the infrastructure of the village.

Union of business owners

This union was set up a couple of years ago to promote the interests of local businesses to the authorities and has about 70 members. The union has organised meetings with officials to solve several infrastructure problems (roads, sewage, garbage disposal etc). In 2011 and 2012 a questionnaire was handed out to tourists to measure their satisfaction with Arillas and many other parameters.

Arillas football club

The football club participates in most festivals and in other activities.

Arillas WiFi enthusiasts club

This club with about 20 members also helps out with technical issues.

Corfu Beer

The Corfu Microbrewery makes fresh beer, according to some the best in Greece. Apart from the economic activity and jobs it has created, it's also done a lot to promote Arillas. Festivals, seminars, events etc are organised every year, bringing people to Arillas.

Meditation Centres

There are three meditation centres in Arillas. Two of them have been offering package holidays for more than 20 years. The third one opened three years ago and now the centres also organise open events such as concerts and open days so that they have more contact with the local community.

Arillas.com

This website is set up by a local taverna owner in his free time and has existed for more than 12 years. It has a very active forum and also promotes Arillas in a very effective way. Many of the people on the forum (mostly English) also help and participate in the joint efforts to make Arillas better.

GreenCorfu.com

Green Corfu was set up three years ago to promote alternative tourism and Corfiot products, and to present Corfu to visitors as the fertile and rich island it is. It's in Arillas and actively participates in the effort to promote Arillas to the outside world and to upgrade the services we offer our visitors.

Customer Research

Here are the main points of our customer research:

- Arillas has an extremely large number of recurring visitors. 1 out of 2 visitors have been here more than 5 times while 1 out of 4 more than 10 times!
- The average visitor of Arillas is over 45, travels single or with a partner/friend, stays two weeks or longer and is a returning visitor.
- Visitors are content about Arillas. Almost all aspects of the area such as the people, accommodation, restaurants, beach, natural surroundings etc score very high. The most impressive statistic of the whole survey (for me) was that 96.5% of the visitors say they will visit Arillas again in the coming 5 years!
- What people value more about Arillas is the peace and quiet, the authenticity and hospitality and in general the feeling of a village as opposed to a resort.
- Another impressive fact is that the most popular answer (by far) to the question “What changes would you like to see in Arillas next time you come?” was “Nothing”!
- Most people coming to Arillas use the internet and book their accommodation directly

with the owners. This means that Arillas is to a large degree independent of big tour operators.

- Next to the nature and beach, the good food, walking trails, meditation centres, and local festivals are seen as big advantages of Arillas.

What we have done

The last 3-4 years many activities have been undertaken in Arillas:

- Spring cleanup of the beach. Every April the Cultural club invites everyone to help clean up the beach for the summer. Big participation from foreigners living here.
- The garbage bin huts are multiplying and other villages have followed and made their own huts.
- We got 5 new recycling bins and plan to raise awareness on recycling.
- We are planning to create some parking spaces so that eventually we can have a car-free boulevard.
- There are plans to make the whole of Arillas wheelchair-friendly.
- The festivals are getting bigger and bigger every year. This year there are plans to dedicate one day of the August festival to discussions on the past, present and future of Arillas, with local producers displaying their produce, a photo exhibition and more.
- The Arillas Trail, the footpath that was created is intensively used by visitors. This year we will create at least one and maybe two more footpaths
- The beachfront is continually being improved with stones, plants, benches etc.
- More than 40 local people have attended the CARPA lessons and can give first aid. We are also going to buy a defibrillator and put it in a prominent spot on the beach to be used in case of emergency.
- The research has pointed out several other things that need to be done, so we still have a lot of work ahead.

How does it work?

What makes Arillas able to achieve all the above is a very interesting issue. This year with the customer study, a vision was set out that is shared by most people of Arillas. People are realising we have to take care of the environment and that we have to upgrade the services, products and experience we give our visitors. This vision is constantly being readjusted but the big lines are there.

I believe this shared vision is very important. The other important issue is simply communication. The best thing is that all the players mentioned before communicate with each other, mostly through informal ways. People get together in the festivals, meetings, seminars etc and share their opinions on the future of Arillas. And because the local community is actively involved in the shaping of this vision, people are also prepared to help make it come true, some more and some less. Somehow, the village feeling of togetherness that was lost in the rich years is now returning, stronger than ever.

APPENDIX VII

SHARING KNOWLEDGE AND CONTACTS

During my visit to Corfu in February / March 2013, I met and made contact via social media with many people involved in tourist-related businesses, and with those that are keen to help improve the island's tourism fortunes. As I also gathered information about various attractions, activities and events taking place around the island I realised that, not only was I finding out much new information even though I have been visiting Corfu for over 10 years, but also that many of those I spoke to were also not always familiar with everything Corfu has to offer.

The information that follows is therefore given in the spirit of sharing knowledge around the contacts I have made on this island, and so that you may then share this with others. I am very aware that this is nowhere near an exhaustive list, neither should it be taken as any indication that I am recommending these business initiatives over others that may not be mentioned here. The information is only what I gathered through personal contact. I am quite sure that a wider directory of contacts could be compiled, using this as just a starting point.

It is also worth considering this information alongside the lists of webpages, portals, facebook pages, blogs etc, that have been identified earlier in this report.

Travelling

- CV Travel. (www.cvtravel.co.uk) Kate Eales (Operations Manager for Ionian Islands)
- Ferry timetable schedules for the summer from Igouminitsa to Iefkimmi
<http://translate.google.com/translate?hl=en&sl=el&tl=en&u=http%3A%2F%2Fwww.lefkimmilines.gr%2F>
- Patras Travel www.onferry.com Online ferry tickets – e-mail napoleon@onferry.com
Napoleon Patras
- San Stefanos Travel - www.san-stefano.gr and www.sanstefanos.co.uk - Noulia Mouzakiti

Attractions

- Acordo 'Corfu Speciality Foods' (www.acordo.gr) – Vasiliki Karounou
- Ambelonas Vineyard (can be found on Facebook – ambelonas corfu) - Vasiliki Karounou
- Book of Corfu Villages <http://www.corfuvillages.eu/>
- Corfu Microbrewery – Arillas – www.corfubeer.com
- Perdita's Glass Art – Perdita Mouzakiti www.perditasglassart.com
- Silvaland - – Equestrian & Life Enrichment Centre - e-mail: thesilvapproject@gmail.com
and www.thesilvapproject.gr
 - Horsewhispering – www.wayofthehorse.org – Franklin Levinson

Accommodation

Real Estate

- Corfu Homefinders - Diana Giannoulis & Susan Daltas
corfuvillasapartments@gmail.com
- RR Real Estate - Roula Rouvas sales@corfurealestate.com and
www.rrcorfurealestate.com

Holiday Accommodation

- Captain Homer's Studios - <https://www.facebook.com/#!/pages/Captain-Homers-Studios/136272869743652?fref=ts>
- Chandris Hotels and Resorts – www.chandris.gr
- CV Travel. (www.cvtravel.co.uk) Kate Eales - Operations Manager for Ionian Islands
- Eleni Trikalioti – preparing new upmarket studio accommodation e-mail: etcorfu@gmail.com
- Federation of Corfu Villas and Apartments - Costas Brentanos (president); Petros Kouris (member of the board) - office Tel 00302661026133
- Galini Beach Studios – Messonghi – upmarket beach studio accommodation - <http://www.galinibeachstudios.com/default.aspx?id=cda02fe3-2fe3-4530-9e31-26cdf0173744> – Nick Prewett
- Irene Villas, Arillas – Spiros and Elena Anthi – www.irenevillas.com
- Hotel Molfetta Beach – Gouvia – www.molfettabeach.com Elena Komboliti
- www.sanstefanoestate.com - Jan Manessi
- Takis Apartments, Sidari – Christiana Avgerinou – e-mail: christianaavgerinou@yahoo.gr
- Zambeta Apartments – Arillas – www.zambeta.com

Events

Event Management

- More information on Events and local festivals would help promote a good image, there are lots of things going on Corfu but there is a lack of information or sometimes information is only available in Greek.
- Between the music department of the Ionian University, and the 18 philharmonic orchestras on Corfu, it should not be too difficult to organize larger musical events. Like an annual competition of marching bands, divided over 6 weekends.
- Beer Bartender training and events – Nicola Radisis – www.beerbartender.gr
- Monopolis event management (including sound and design) – www.monopolis.gr

Events

- Agiotfest <http://www.agiotfest.co.uk/> and <http://www.agiotfest.gr>
- Animation Festival <https://www.facebook.com/betherefest>
- The Bacarole sea festival
- Church Choir Festival 06/04-07/04/13 - the second Church Choir Festival of Corfu taking place at Agios Georgios at the Old Fortress including international choirs.
- Classical Music Festivals - Vivienne Pittendrigh - has been organising the small festival Divertimenti in Corfu since 1992. There will be a Festival in September 2013 along with a Chamber Music Holiday and Festival with the world famous Czech Martinu String Quartet and violist of the Wihan Quartet Jiri Zigmund. Details are on the website www.chambermusicaholidays.com
- International Folklore Festival - <http://www.muzaoffice.hu/index.php/en/actual-offers/folklor-festivals/325-greece-corfu-7th-international-folklore-festival-kerkyra-corfu-greece>
- Ionian Music Festival can also be more actively promoted to tourists
- The Lighthouse Community Centre – various concerts

Activities

- *Boat Trips* – Captain Homer (Messonghi River)
<https://www.facebook.com/#!/pages/Captain-Homers-Studios/136272869743652?fref=ts>
- *Corfu Trail* -needs to be promoted better with walking groups, particularly as an off season holiday. Contact could be made with apartment owners along the way to provide accommodation and food to the weary walkers
- *Craft workshops* - Corfu has so many traditions and most of these are dying out. More workshops could be held to teach tourists and locals some of these crafts or at least to show us how they are done. Some ideas would be basket weaving, tapestry, wine, goats cheese, honey and bread baking and pottery. With an island full of artistic and local craftsmanship it's a pity to see it dying out like in most of Europe. Something has to be done to encourage local traditions.
- *Cultural heritage*
 - the historic old town of course, the island's churches, museums, art centres
 - Chamber Music Holiday and Festival with the world famous Czech Martinu String Quartet and violist of the Wihan Quartet Jiri Zigmund. Details are on the website www.chambermusicolidays.com
- *Durrell School* – Alexina Ashcroft
- *Eco-tourism* – better promotion of Eco nature places such as Lakes Korission and Antinioti.
 - <http://www.bioporos.gr/enu-index.htm> ecological farm
- *Excursions*
 - Budget Ways – Moraitika – Tel: 2661076768 / St John's – Tel: 2661072364
- *Language Schools*
 - Patrissia Adrioti – Andrioti language school
<http://www.andrioti.com/index.php/en/>
 - Greek Language and Culture Seminar – to be held in Corfu Town, on Saturday, 20th April 2013, 11am-2pm (with coffee/tea and cookies). The participation fee is 20 Euros including the ingredients for the Greek sweet, teaching material, coffee, cookies and a paper of attendance. For more information please contact: 6978248304
- *Markets* - and a central market in town is one of the suggestions that we have put forward with the new re-branding initiative. A central Market in town that would allow entrepreneurs, farmers and even shops to sell their wares would be good for the Islanders and tourists love a good market. Smaller local markets would serve the same purpose on a smaller scale.
 - NB: I was asked to provide some information on the way such initiatives are organised (particularly regarding legal and tax issues. The following websites have excellent information about this – including how to establish co-operatives to pool resources and share liabilities:
 - <http://www.agr.state.il.us/farmersmarket/>
 - <http://en.wikipedia.org/wiki/Cooperative>
- *Number 1 Bootcamp* - a fitness bootcamp will be opening this summer in A.Georgos Paghi. Currently it is open to locals from Corfu, but the venue will be a bootcamp holiday for paying guests <http://no1bootcampcorfu.com/> Alternatively please contact Lee Chapman, No1bootcamp on facebook.
- *Silvaland* – Equestrian & Life Enrichment Centre - e-mail: thesilvaproyect@gmail.com and www.thesilvaproyect.gr

- Horsewhispering – www.wayofthehorse.org – Franklin Levinson
- *Wedding organisers* - San Stefanos Travel - Noula Mouzakiti
- *Radio Controlled aircraft* - <http://www.rchotel.com/> (holidays for those interested in flying remote controlled model aircraft – hotel and flying school)
- *Holistic therapies*
 - <http://www.casa-lucia-corfu.com/index.php?lang=en> - Regular classes take place in various body-mind practices such as t'ai chi, yoga, qigong and 'bodylistening'. Qualified practitioners come to give massages, beauty treatments, and alternative therapies. Guided walks into the unspoiled countryside of Corfu are organised. Child care is available on request and there are creative activities for children of all ages. Workshops are frequent ranging from yoga, t'ai chi, dance, theatre and voice to Greek cookery, painting and poetry. These are taught by local and visiting teachers and attended by the visiting group, individual visitors and the local community. We also host concerts and performances, family and child centred workshops and events, exhibitions, research projects, meetings and festivals. It is also a perfect venue for family re-unions, weddings and other such gatherings
 - Sunbeam Reiki & Crystal Therapies – Hazel J McCully www.reiki-and-crystals.co.uk

Press / PR / Publicity

- *Birdwatching*
 - Many birdwatchers etc are aware of the charms of Corfu, but it may be worth asking high profile (in that field) journalists to come and write an article for the magazines for enthusiasts. We could give accommodation and take them round, introducing them to local experts (Aleko-orchids, Jean-Pierre-snakes, Hilary-walks, Teresa-art for example). A very experienced travel journalist who loves Corfu and has a house on Paxos is Mark Ottaway, now formally retired from the Sunday Times I believe but still actively involved in promoting somewhere he loves, maybe he would help.
 - With so much nature especially with birds, butterflies and wild flowers perhaps this area could be better promoted especially around lake Korission near Halikounas and the salt pans in Lefkimmi where flamingoes can even be spotted. Perhaps somebody with knowledge in this field could write something informative about the Corfiot species. Then it could be distributed through advertising or emailing it to birdwatching clubs in Britain and Ireland
 - <http://www.birdtours.co.uk/tripreports/greece/corfu3/may-03.htm>
- *Photography services*
 - Christos Gatis - - I am a photographer here in Corfu and I collaborate with graphic designers and other professional photographers. About to publish a monthly magazine in English and Greek that will include various professional photos of the island, articles and interviews as well as numerous advertisements. Its aim is to advertise and promote the island and local businesses. Contact details : 6994862473. E-mail : xristos.gatis@gmail.com Internet site : www.vipphoto.gr Facebook : <http://www.facebook.com/Vipphoto.gr>
 - Gavin McCully – GXMCCULL Photography Services – gxmccull@gmail.com

Tavernas / Bars / Restaurants

- Buddies Bar, Moraitika - <https://www.facebook.com/search/results.php?q=Buddies+Bar&init=public#!/buddies.bar.3>
- Cafe Noah - Paul & Su Taylor - <https://www.facebook.com/CafeNoah>
- Kafesas Too Music Bar St George South - Harriet Lioumba - <https://www.facebook.com/pages/Kafesas-Too-Music-Bar-St-Georges-South/292592180760952>
- Porta Remounda – Corfu Town – Tel: 2661022658 – also can be found on facebook Porta Remounda Taverna
- Rouvas (the oldest restaurant in Corfu Town) Tel: 2661031182

Offers of help:

- Adrian Ward – co-ordinating the Real Corfu web portal adrian@realcorfu.com
- Alex Christou – co-ordinating Green Corfu and Alternative Kerkyra alex@greencorfu.com
- Janet Darbey – jjdarbey@hotmail.com
- Stella Hahamidi – translation services (English and Russian) – e-mail: hahamidistella@gmail.com
- Lesley Ann Hoy - helps local owners who don't have internet or understand this growing market and have set up several other sites and have a FB, LinkedIn, Pintrest Board and various other social media outlets to try and help local businesses. E-mail to: info@corfuselections.com website.
- Contactable via the Corfu Grapevine Facebook Group
 - Charlotte Barry - I have just started studying hospitality management and have lived/worked in Corfu the past 6 years so it's something I would love to be involved with.
 - Sue Crossley – Overseas Operations Manager for Olympic Holidays
 - Kerry Forides - I have started a snappy marketing campaign that is directed solely at promoting Corfu Island.
 - Michelle Litourgi – Kavos
 - Maria Smyth - having worked in tour ops here for 15 summers and then spending another 16 years teaching tourism courses and gaining a Masters in Tourism and Leisure management in the UK now that 'm retired here I'd like to be involved if anyone thinks I might have the skills required.
 - Linda Zafiris – has worked in Corfu for over 23 years mostly for First Choice and Thomson.

APPENDIX VIII

Cardiff & Co²

This paper will focus on the role of new media in the tourism representation and city image of Cardiff, the national capital of Wales, a partially devolved nation of the United Kingdom. It will be framed within the conceptualisation of the capital city as a ‘product’ brand under the nation’s corporate umbrella (Skinner, 2009), recognising that Cardiff is a multicultural capital city whose representation and image is also inextricably linked with the representation of the cultural and national identity of Wales.

Based upon ideas presented by Grönroos (2006) and Sheth and Uslay (2007), there is a belief that, in contemporary society, particularly within a communications environment dominated by social media, the place marketer’s role is no longer to deliver customer value, but only to support tourism consumers’ own value creation by managing interactions with them. Insights are therefore also offered that analyse findings against this background of the shift towards places being researched from an experiential rather than identity conferment perspective, an approach that also reflects the change in balance of power between the place marketer and tourism consumer.

Cardiff has experienced major transformation over recent years, and aims to propel itself forward as a premier league European capital over the next two decades. Cardiff & Co is the organisation charged with promoting the city region, and aims to help Cardiff become a top 5 UK shopping destination, top 10 UK short break destination, and to improve the capital’s position in the top 10 of UK conference cities. Within this context Cardiff & Co’s key areas of activity include managing the Cardiff brand, and promoting the city region for tourism. The city’s representation in new media is evident at Whycardiff.com, the official website for Cardiff which acts as a portal for information regarding investment, tourism, conferences, events, shopping, education, living and working in Cardiff. Through managed efforts by Cardiff & Co the capital city is now represented in a range of new media, whereas the new media representing the national image of Wales for tourism is managed by Visit Wales. Findings concerning the use of a range of new media by both organisations will also explore the synergies and differences between the representation of the capital city brand of Cardiff and the national brand of Wales. Results challenge the dominance of the concept of integrated marketing communications when promoting place brands for tourism (Skinner, 2005).

References

- Grönroos, C. (2006) ‘Many to Many Marketing as Grand Theory: A Nordic School Contribution’, in *The Service-Dominant Logic of Marketing*, Robert F. Lusch and Stephen L. Vargo, eds. Armonk, NY: M.E. Sharpe, 339–53.
- Sheth, J.N. and Uslay, C. (2007) ‘Implications of the Revised Definition of Marketing: From Exchange to Value Creation’, *Journal of Public Policy and Marketing*, 26(2), pp.302–307.
- Skinner, H. (2005) ‘Wish you were here? Some problems associated with integrating marketing communications when promoting place brands’, *Place Branding*, 1(3), pp.299–315
- Skinner, H. (2009) ‘The capital city as “product” brand under the nation’s corporate umbrella’, In: Maitland, R. and Ritchie, B. (Eds) (2009), *City Tourism: National Capital Perspectives*, Oxfordshire: CABI, Chapter 3

² Skinner, H. (2012) ‘Cardiff & Co’, 8th *International Conference on Tourism*, Athens, Greece 11–14 June 2012.

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Cardiff & Co.

Dr Heather Skinner
Glamorgan Business School

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Slide 2

Aim

- This research focuses on the role of new media in the tourism representation and city image of Cardiff, the national capital of Wales, a partially devolved nation of the United Kingdom.
- It will be framed within the conceptualisation of the capital city as a 'product' brand under the nation's corporate umbrella (Skinner, 2009), recognising that Cardiff is a multicultural capital city whose representation and image is also inextricably linked with the representation of the cultural and national identity of Wales.

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Slide 3

Social media and the role of the place marketer

- Within a communications environment dominated by social media, the place marketer's role is no longer to deliver customer value, but only to support tourism consumers' own value creation by managing interactions with them. Insights are therefore also offered that analyse findings against this background of the shift towards places being researched from an experiential rather than identity conferment perspective, an approach that also reflects the change in balance of power between the place marketer and tourism consumer.

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Cardiff & Co.

- Cardiff & Co is the organisation that promotes the capital city region. The aim is to help Cardiff become a top 5 UK shopping destination, top 10 UK short break destination, and to improve the capital's position in the top 10 of UK conference cities.
- Within this context Cardiff & Co's key areas of activity include managing the Cardiff brand, and promoting the city region for tourism.

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Cardiff & Co's online presence

- Cardiff & Co website - Whycardiff.com, the official website acts as a portal for information regarding investment, tourism, conferences, events, shopping, education, living and working in Cardiff – includes links to a wide range of social media platforms
- Visit Wales website – represents the national image of Wales for tourism
- This research will also explore the synergies and differences between the representation of the capital city brand of Cardiff and the national brand of Wales.

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Method

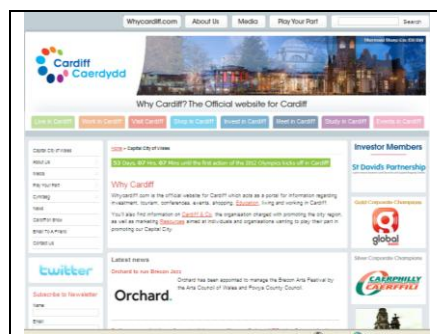
- Data were collected via qualitative techniques
 1. Scrutiny of relevant websites
 2. Depth interviews with those responsible for PR, web and social media strategy at Cardiff & Co.

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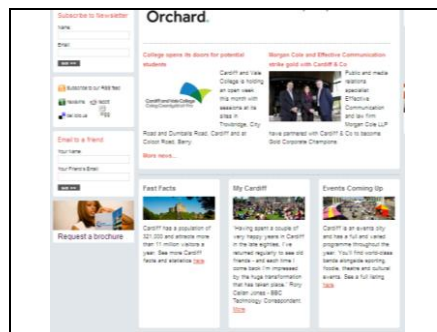
Slide 7



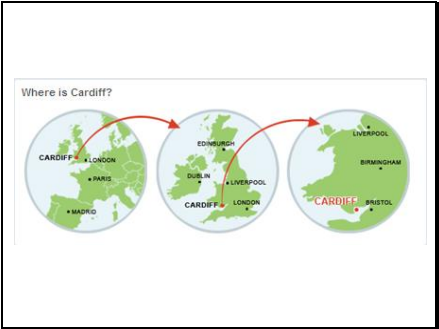
Slide 8



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Slide 10



Slide 11



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	Why Cardiff	Live in Cardiff	Work in Cardiff	Visit Cardiff	Shop in Cardiff	Invest in Cardiff	Meet in Cardiff	Study in Cardiff	Events in Cardiff	Visit Wales
Twitter	X	X	X	X	X	X	X	X	X	X
RSS	X	X	X	X	X	X	X	X	X	X
Newsline	X	X	X	X	X	X	X	X	X	X
Reddit	X	X	X	X	X	X	X	X	X	X
Delicious	X	X	X	X	X	X	X	X	X	X
Digg	X	X	X	X	X	X	X	X	X	X
Newsletter	X	X	X	X	X	X	X	X	X	X
Brochure	X	X	X	X	X	X	X	X	X	X
Email page	X	X	X	X	X	X	X	X	X	X
Facebook				X	X	X	X	X	X	X
TripAdvisor				X	X	X	X	X	X	X
iPhoneApp				X	X	X	X	X	X	X
LinkedIn				X	X	X	X	X	X	X
'Share' Links				X	X	X	X	X	X	X
YouTube				X	X	X	X	X	X	X
Flickr				X	X	X	X	X	X	X

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Key findings – strategic focus

- Cardiff & Co is in the process of migrating all their sites onto one platform. Currently, for example, LinkedIn is available only on the 'invest' site, ('study' and 'invest' are the newer sites).
- This variance does not reflect a strategic decision, but has evolved due to different sites being developed separately, using varying platforms each with varying links coming in and going out.

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Key findings - workload

- The move to more online and social media is having an effect on workload – only 2 staff are managing the website, social media and all publications.
- Cardiff & Co staff go on Facebook once a day, to check posts, check no one has spammed the account, and upload images - 'there's a better response to images' than to text alone
- Twitter is used more frequently during the day. To help manage staff workloads, tweets are scheduled (using Hoot Suite) morning, lunchtime and then again at the end of the day.

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Key findings – issues of control

- “You can’t control who mentions you”.
- With Facebook you can delete a post and ban the poster.
- So far there have been no negative comments on Twitter – apart from some “anti-Welsh sentiment when Cardiff [City Football Club] were in the playoffs last year” the main opinions being that the premier league was an English league.

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Key findings – use the right tools for the right jobs

- Facebook is mostly used for leisure and tourism. Cardiff & Co use this platform to post news sourced from member organisations, linked together by a shared 'like' – FB 'gives this news an outlet'. The platform 'brings people back, makes them aware'. However, it's individual 'about me', it's closed, it's not really for linking to business pages – FB can also be annoying just through the sheer amount of posting, and news spreads so much slower due to privacy controls.
- Twitter is about 14s and 140. People expect to see constant postings. Cardiff & Co has around double the number of followers on their 'visit' page than friends on FB.
- YouTube is now being used more like Google+ to search for content. However, due to historic issues of perceptions of lack of control, Cardiff & Co use a different platform "Cardiff on Show" as a video platform, not YouTube. On the plus side, this allows Cardiff & Co to brand into the site but it's not free to upload like YouTube. 'you keep better control of content, but it needs more managing'.

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Key findings – mobile marketing

- There is a need to scale up from platforms such as Twitter, moving away from posting only member organisation news, instead moving towards more crowd sourced content. Twitter is also more conversational – 'you can tell from updates who's using smart phones and who's tied to PCs'.
- The Cardiff iPhone App is basically a listings service for consumers, but 'also offers added value to Cardiff & Co members'. Use of GPS and map function of how to get to restaurants / leisure venues / events. iPhones also then useful because once someone has found something on the map on their phone, 'potential customers can then ring up and book'.
- "More people are getting on board with Twitter", they're getting used to using the hashtag from TV programmes.

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Key findings – links to NTOs

- Cardiff & co can 'buy-in' to Visit Wales as a 'region' and work with them. Visit Wales also has a 'good blog', and will host contributions from Cardiff & Co who can do guest postings.
- With Visit Britain (and also Visit Wales) there is a 're-tweeting' arrangement, where these organisations will re-tweet info especially re big campaigns, e.g. when the Dr Who exhibition opened in Cardiff.

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Summary

- Although Cardiff & Co targets different audiences who may be interested in Cardiff for different reasons, the DMO believes there is consistency of the brand. Even on specific URLs 'it's always the same brand', even though there may be different images. There are more elements to brand Wales than Cardiff, but Cardiff is a microcosm of Wales.
- Effective use of social media is not just about understanding the way consumers use different platforms, but also about what devices people use to access them. (e.g. facebook ads don't show up on smart phones)
- Social media must offer something to the consumer - if there's no reward, why bother using a platform or some of its features?
- The shelf-life of various platforms is now becoming increasingly limited.

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Conclusion

- Results challenge the dominance of the concept of integrated marketing communications when promoting place brands for tourism (Skinner, 2005), and highlight the lack of strategic implementation and co-ordination of social media in this context.
- Further research: next steps - comparisons of other capital city and national brands in other countries

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APPENDIX IX

EFFECTIVE USE OF SOCIAL MEDIA

A recent study by the Chartered Institute of Marketing (CIM Social Media Benchmark: Wave One – Autumn 2011) found that the following social media is currently used by businesses:



71%



56%



53%



41%

Their survey respondents also noted that the next wave of social media use by businesses in general was likely to include:

- Mobile apps
- Social media analytics
- Blogs
- Proprietary online communities
- Hiring a social media agency
- Google+ for business

These 'new media' can offer:

- New ways of communicating: Blogging, instant messaging, virtual worlds, MMS - SMS and email are SO last year!
- New ways of socialising: For example through social networks such as Facebook, Bebo, Myspace, or virtual online communities such as Second Life
- New ways of finding knowledge: For example Blogs for unbiased views or ordinary people, Wikipedia for pooled expertise, Google searches, checking prices through Amazon and eBay
- New ways of entertainment: For example watching and sharing videos on Youtube, listening to your own customised radio channel (streaming radio)
- New ways of doing business: E-commerce: consumers are used to buying, now they are getting into selling through eBay and Amazon; facilitates new business start-ups: low start-up costs, no market research, no strategy... just small ideas

New Media For Tourism

“Web 2.0 tools are widely used by tourists to get information about tourism destinations and to share their tourism experiences. The digital content provided by these tourists has increasingly influenced destination awareness and image creation ... [entailing] a change in the locus of control of the creation process of the online branding of destinations. Nowadays, web branding content, previously controlled by organizations and corporations, is to a larger extent the expression of the interaction and participation of end-users” (Munar, 2011)

General social media sites

- Facebook.com
- Myspace.com
- Twitter.com
- Youtube.com

Photo and film sharing sites

- Flickr.com
- Tripfilms.com
- Travelistic.com
- Digg.com

“Many of the images on these sites have a real life approach, without any or only a minimum amount of manipulation. This form of content makes a very powerful contribution to destination image formation. The main content and focus of these visual contributions is on the personal experience and not on the formal visual elements of the brand” (Munar, 2011).

Review sites

- TripAdvisor.com
- Wayn.com
- Virtualtourist.com
- Gowander.com
- Hostelz.com
- IgoUgo.com
- Lonelyplanet.com (Thorn Tree)
- Travelersfortravelers.com
- Trustedplaces.com
- Worldreviewer.com

“The review genre is based on the critical evaluation of a tourism product or experience ... which creates a lot of concern among tourism suppliers. ... Although the focus of the review genre is not on the destination as a whole but on specific tourism products, the composite nature of the tourism experience also makes this type of TCC [*tourist created content*] very pertinent to the overall image formation of the destination brand” (Munar, 2011).

Blogs

- travelblog.org
- travelpod.com
- blog.realtravel.com
- yourtraveljournal.com,
- worldnomads.com
- travelpost.com
- blogabond.com
- iTourist.com

“One of the most important information sources for travel planning is word of mouth (Schmallegger and Carson, 2008). Blogs, instant messaging, online reviews and recommendations are becoming the new digital form of word of mouth (Litvin et al., 2008; Schmallegger and Carson, 2008). Sigala (2009, p. 221) noted that “as information is the lifeblood of tourism, the use and diffusion of Web 2.0 technologies have a substantial impact of both tourism demand and supply” (Vrana & Zafiropoulos, 2010).

The majority of travel blogs are diaries by individuals about their trips (Lew, 2007). Travel blogs can include comments, suggestions, advice, directions, maps, photos and videos, links to related web sites and to external information, links to other travelers, RSS, trackbacks, comments, taglines, archives, permanent links and blogrolls - a list of blogs that many bloggers maintain and occupies a permanent position on the blog's home page. (Vrana & Zafiropoulos, 2010).

“Blogs can impact on travelers' evaluation of tourism products and their decision-making process: “when reading others' travel experiences through weblogs, this also creates to the reader the willingness to travel and visit the same destination” claimed Sigala (2009, p. 225). Xiang and Gretzel (2010) also highlighted the functions of blogs in creating and sharing new experiences, trustworthiness to online travelers, and the use of blogs as marketing intelligence” (Vrana & Zafiropoulos, 2010).

Useful resources and guidance on using social media can be found at:

- <http://www.cipr.co.uk/>
- <http://www.insidepr.ca>
- <http://www.smartinsights.com/about-dave-chaffey/>
- <http://www.smbenchmark.com/the-benchmark/results-wave-one/infographic-wave-one/>
- <http://socialmediatoday.com>
- <http://hootsuite.com>
- <http://klout.com/>
- <http://www.score.ly/>
- <http://www.slideshare.net/>
- <http://www.linkedin.com/groups?gid=66275>
- <http://mashable.com/>