QualityCoast and Alonissos
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Preface

This report is a result of an internship of two research students at the Coastal Zone Management Union (CZM Union). They both went for different periods to the Greek island Alonissos. They did research about tourism and performed a visitor survey with questionnaires they handed out to tourists. This report has advising and informing aim, hoping to help the people of Alonissos to improve tourism on the island. The introduction tells more about the students and their research.

Both students would like to thank several people for helping them with the conducted research.

Malou van Kempen (period March-August 2013):

I would like to thank the company supervisor Albert Salman, who has always supported me and given me feedback during this research and the same counts for my NHTV supervisor, Wesley Put. At the destination I couldn’t have written this report without Zafeiroula Anagnostou who is closely involved in tourism and helped me out whenever I needed help. Petros and Zoe Vafinis deserve a big thanks as well for providing me with office space throughout this research. I would also like to thank all ‘distribution points’ that helped me collect the amount of questionnaires that I have today. A last special thanks is to the island, its people, who have always been very supportive of my project and have always been more than willing to help. Thank you for making this project as enjoyable as it was.

Nadine Smits (Period August-December 2013):

I am grateful towards a lot of people who helped me as far as I am now. This was my very first internship and it was exciting to do this on my own; I have learnt so much, besides my work as an intern, about people, language and independency. I would like to thank my company supervisor Albert Salman very much for this opportunity and the trust he gave me to do this as a first internship. Also a ‘thank you’ towards my supervisor from my university, Harry Niehof, for keeping in touch and making sure I was doing fine. Also the first week with Malou van Kempen on Alonissos, before she left, was very nice and helpful and I want to thank her for helping me out even when her internship had ended. For the incredible nice working atmosphere at the Marine Park Centre where I was volunteer, I want to thank all the Marine Park volunteers and Gregoris Karamitros for helping where he could. Finally, I can’t thank all the people of Alonissos enough for their friendly approach, the tourists of Alonissos for filling in the questionnaires and the hotels and bars who were willing to hand the questionnaires out. All these people were all a part of my Alonissos experience and made it in their way very memorable for me.
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Introduction

This document is the final result of a research into sustainability of tourism on Alonissos, tourism numbers and their characteristics and the accessibility of Alonissos. The research was conducted as an internship for QualityCoast, EUCC. Intern Malou van Kempen co-operated within this research as part of the third year International Tourism Management and Consultancy curriculum at the NHTV, University of Applied Sciences. Her part of this research was conducted over a time span of six months, of which four and half were spent on Alonissos. After this time span, she was followed up by intern Nadine Smits, who completed the research. Her part of this research was conducted over a time span of 4,5 months, of which 3 months were spent on Alonissos.

This report exists of a total of three main chapters. Chapter one is the application for the QualityCoast Policy Award 2014 of which the core indicators and my choice indicators are completed. As a results and conclusion of the application, recommendations are given to improve sustainability on Alonissos in chapter 1.1. In the second chapter the QualityCoast Visitor Survey and its results are discussed resulting into a visitors profile. Although an extensive written analysis is giving, the excel results are also available, however these are only available in a digital version. As a result of the QualityCoast Visitor Survey and the visitors profile that is created from these questionnaires, marketing recommendations are giving in chapter 2.1. In the third and last chapter the accessibility of Alonissos is discussed and again suggestions are given in regard to how this could be improved. Furthermore, the report will contain different appendixes with the application form, the QualityCoast Visitor Survey and tables about connectivity.
**Summary**

**Typification**

Alonissos is a small island destination with around 3000 inhabitants. They have a focus on sustainability in its involvements stage that attracts alternative forms of tourism, partly because of the fact it’s not as easily accessible compared to other destinations, with 90% of tourists visiting in the time span of 4 months which makes tourism to Alonissos highly seasonal. 90% of the businesses involved in tourism are family owned and run with no international large companies involved yet. The marketing of the island is very limited, there is not yet use of the marketing tool provided by QC.

**The destination life cycle**

The destination life cycle (Butler, 1980) has been used in order to determine in which stage the tourism development of Alonissos is. After conducting several interviews and reading a report on tourism of the year 2000 concluded can be that Alonissos is in its involvement. Most facilities are only open during the tourist season and therefore primarily serve tourists and the contact between visitors and locals is still high, two of the characteristics of the involvement stage (Butler, 1980). At this stage some level of organization in tourist travel arrangements can be expected and the first pressures put upon governments and public agencies to provide or improve transport and other facilities for visitors. In the case of Alonissos this process has been going on for relatively long now and there are no clear signs of the development stage yet, where there is a well-defined tourist market area, shaped in part by heavy advertising in tourist-generating areas.

*Figure 1: Destination Life Cycle for Alonissos*
**Snapshot of destination**

Alonissos is a natural destination with a sustainable character. Tourism is not fully exploited yet and numbers of arrivals vary per year, but don’t increase rapidly. However, clear policies and strategies regulation tourism growth and development still lack which could damage the sustainable character of the destination, which is important because a big part of the island’s identity is about nature and sustainability. Especially considering the relatively short duration of the season, which puts of pressure on the island and its inhabitants during those months. Efforts are made though and policies improved. The QualityCoast Award is one good example of showing how much they want to keep the destination this way. Since the island is considered as a small island destinations characteristic such as its small size, remoteness, vulnerability to external shocks and narrow resource base (UNWTO, 2013). Hotels are mainly small scale with one a handful of bigger scale hotels owned by other people than residents. The wide variety of restaurants on the island is for 90% owned by residents and is family run.

A tourism committee exists that makes choices about marketing efforts. These marketing plans are mainly short term (within the time span of one year time) with the exception of a few plans for the upcoming 5 years. Little data are available on tourism number and characteristics of tourism to Alonissos and the accessibility problem has not been address properly yet. Collection and analyzing data about tourists is one of the short term goals which will be used in order to improve marketing. Accessibility will remain a problem in the near future, but recommendations are made about providing information about this accessibility to prevent disappointments.

**Market snapshot**

Tourism to Alonissos is very seasonal. The main markets visiting Alonissos are the UK and Greece itself. Other traditionally important markets are the Netherlands, Germany and Italy. Scandinavia and Russia are considered as upcoming markets due to the fact that visa regulations have been changed, direct flight to Skiathos are available and the fact that they have stable or even growing economies is considered as an important asset.
1.1 QualityCoast Award Application Alonissos 2014

One of the main aims of the project was to complete the assessment of the re-application for Alonissos for the QualityCoast Policy Award. The assessment that can be found in the appendices (Appendix 1) is the result of a combination of own experience, secondary data and interviews with local residents and authorities.

The assessment form completed and shown in the appendices are the core indicators and my choice indicators. The assessment of these indicators is discussed with the local authorities and is declared finished. As is visible, the core indicators are filled in in total. The my choice indicators are met to be most filled in as possible; at least one indicator per subject is asked. Other filled in information is optional; though there is tried to collect as much data as possible.

The indicators are slightly different from the previous application form, so expected is that the result might be slightly different too. Overall the expected score is high, with slightly lower point looking at providing information, energy resources, waste management, sustainable transportation, tourism data and water management. In the next chapter recommendations are given to improve these points.
### 1.2 Recommendations for improving sustainability in tourism

In order to give recommendations to improve the sustainability of tourism on Alonissos, this year’s application form has been taken into consideration together with the QualityCoast Visitor Surveys to see what tourists gave as recommendations. After considering these two factors, academic articles have been read in order to give appropriate recommendations. The following challenges are identified;

- Lack of information to both tourists as well as residents about sustainability, but also about natural and cultural sites. Also information does not have an encouraging character at the moment which promotes responsible behavior. A good example of this is the just introduced recycling on the island. There is lack of information about the value of recycling, which causes the local inhabitants into being unmotivated to co-operate.
- Energy resources
- Waste management
- Sustainable transportation
- Monitoring (and publicly reporting) of data about tourism
- Water management
- Nature friendly products

In these recommendations Alonissos is treated as a Small Island Developing State (“SIDS”) since the characteristics of both are very similar. The UNWTO states that the natural, economic and social systems of SIDS have very high levels of vulnerability, which arise from the following shared characteristics:

- Small size;
- Remoteness;
- Vulnerability to external (demand and supply-side) shocks;
- Narrow resource base; and
- Exposure to global environmental challenges (UNWTO, 2013)

#### 1.2.1 Lack of information

Although Alonissos intends to profile itself as a sustainable destination, information provided to tourists and residents proving this is still lacking. Several important GSTC destination criteria are about informing tourists and residents, both about the content of the natural and cultural sites, as well as information that promotes responsible behavior. At the moment this is still lacking. Easy solutions would be to provide information signs at natural and cultural sites, that not only provides information about the site, but also encourages people to behave responsibly. For residents but also stakeholders a campaign would be very useful. This campaign could stress the importance of sustainability in tourism for Alonissos. Subject could differ from electricity management to water management and waste management.
Also, providing information must be done in a more active way. This year, there were three new ‘beach’ buses introduced on the island. A small office in Patitiri (harbor) provided information about bus schedules, which is a good initiative. This office did not stand out and it was not clear to tourists where it was used for. This caused unnecessary answers in the questionnaires about the non-existence of a bus visiting various beaches, because there is a demand from tourists for this. Furthermore, there are a few points on the island that provide information (activities, cultural information) for tourists, including two travel agencies and the earlier mentioned office in Patitiri. To avoid confusion, it can be a solution to have one central point with all the flyers and the whole information package about Alonissos, like the new small office in Patitiri. Another solution is to let these information points provide the same information and offering an assortment of all available touristic flyers of Alonissos to give every tourist most complete information possible.

From questionnaires and conversations with locals it appeared that the largest part of foreign tourists are known with the process of recycling and notice the recycling bins on the island. This is in contrast with the inhabitants of Alonissos, who after working with their new recycle system for a few weeks, still question this method. Most tourists are aware of the basic effects of recycling but they could be better informed and improve a more active attitude to continue recycling behavior on the island. Also, the text on the recycle bins is only written in Greek so foreigners can not understand which bin is for what kind of rubbish. There is also a small recycling poster or flyer with a small part of English explanation on it. This flyer can be spread much more, with more attention drawing colours and more professional as it is now. This will stress that recycling is important on the island for the tourists, so they are activated to contribute.

One improvement on the lack of information will be the QualityCoast poster, provided by QualityCoast in July 2013. This poster does not only show that Alonissos has won a QualityCoast Policy Award, it also encourages people to behave responsibly (taking care of nature and wildlife, disposing plastic and cigarettes in bins, using water wisely and preventing fires). Advised is to display this poster in a different places so that it will be easy for tourists and residents to read the poster. Also, Alonissos received QualityCoast flyers. As earlier advised, to inform tourists in the most complete way this flyer has to be spread over all the general touristic information points. In 2013 neither posters nor flyers were visible anywhere, while this would have been free advertisement for the sustainability of the island.

The downside of of providing information by posters is that they are not always displayed in places who are most likely to stand out for the tourists. Advised here is that there must be carefully thought about the places to display the posters, to reach the largest part of the tourists.

1.2.2  **Energy management**

“At present most small island developing states (SIDS) are highly dependent on the import of fossil fuels for electricity generation. The combined effect of high transport costs for fossil fuel imports, a limited demand for fuels domestically and diseconomies of scale in electricity production, makes power production not only extremely expensive but also bears financial risks in the long term. “(Weisser, D., 2004). Alonissos is in a similar situation. Currently Alonissos depends for more than 90% on fossils fuels (Anagnostou, Z, 2013). The statement of the high costs of electricity in SIDS is also the case on Alonissos
which is confirmed in multiple in-depth interviews with residents. On top of that, Alonissos strives to have a as sustainable as possible character, of which renewable electricity should be a part.

Different destinations have different possibilities for renewable power. The most important ones are solar, wind, biomass, hydro and geothermal. Although a more professional expertise is needed, there seem to be options for at least solar and wind energy on Alonissos. However, more detailed information is needed to determine costs and benefits of renewable energy projects.

**Wind and solar energy**

This form of energy together with solar energy is the most suitable way to obtain renewable (green) energy (figure 2). You can see that Alonissos has at least 4 sun hours a day and in high summer even 13. This makes Alonissos very suitable for solar energy. Also, solar panels can be infiltrated easy on the island because it is not drawing so much attention then for example windmills. In summer months, Alonissos has a relatively dry climate because of little rain and much sunshine, which is also positive for using solar systems. Wind energy systems are more difficult for Alonissos to use. Alonissos is located in Europe's biggest protected marine park, which means that there is no opportunity to use windmills at sea. Alonissos is, as earlier mentioned, a small island so windmills on the island itself would take much space. There must also be thought what windmills do to the view of this natural island. On the other side, the wind circumstances are positive to take advantage of windmills. An Aegean sea wind named 'Meltemia' is coming from the north during summer, which can take up between 5 and 7 on the Beaufort scale (Ikion hotel, 2010-2012). If the limited space of Alonissos would not be a problem, this is an option to consider.

| Solar energy can be used on Alonissos for heating water but also for electricity (PV-panels). |

| Max Daytime Temperature (°C) | 11 | 13 | 14 | 16 | 20 | 24 | 26 | 28 | 29 | 29 | 28 | 27 | 26 | 24 | 20 | 19 | 17 | 15 | 13 |
| Min Night-time Temperature (°C) | 5 | 5 | 7 | 10 | 14 | 15 | 16 | 18 | 21 | 21 | 19 | 18 | 14 | 11 | 17 | 18 | 20 | 23 | 24 |
| Hours of Sunshine (Daily) | 4 | 5 | 6 | 8 | 10 | 12 | 12 | 12 | 10 | 9 | 8 | 7 | 5 | 4 | 8 | 10 | 10 | 10 | 8 |
| Hours of Daylight (Daily) | 10 | 11 | 12 | 13 | 13 | 13 | 11 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Heat and Humidity Discomfort | | | | | | | | | | | | | | | | | | | |
| Days with some Rainfall | | | | | | | | | | | | | | | | | | | |
| Monthly Rainfall (mm) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| UV Index (Maximum) | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Sea Temperature (°C) | | | | | | | | | | | | | | | | | | | |

**Figure 2:** Weather on Alonissos (Weather2travel, year unknown)

**Biomass energy**

Biomass energy is sometimes an option to gain cheap and green gas, heat and power without the costs of importing fossil fuels. Biomass gas is made out of organic materials or litter (fruit, plants, manure). Biomass energy can work in two ways. One is that waste products and organic materials are taken to a biomass plant and burned. The heat that is created is used to boil water and the energy from the steam
is used for power (figure 3). The other method, through which energy is created, is called 'Landfill Gas'. When garbage is burned or decomposes, it gives off methane gas. Pipelines, who are put into the pits in which the garbage is burned, collect the methane gas. After this process the methane gas is used to make energy in power plants. After using organic litter and other organic materials, it is important to plant the nature back that you have taken because of CO₂ emissions and also to keep making biomass energy (figure 4).

Figure 3: Biomass to electricity (Sethi, P. year unknown)

Figure 4: The carbon cycle (Alternative Energy Recourses, year unknown)

For Alonissos, this could be a way to use their organic litter which is present on the island. On the other hand, the process of getting energy or gas out of it takes longer then with wind or solar energy. A question is if the amount of available organic material on Alonissos is enough to make a profit out of it
and if it affects the nature too much. A second question is, also because of the size of Alonissos, if new planted trees and plants grow fast enough to be used as renewed material for biomass energy.

Biomass is not recommended for Alonissos.

Hydropower

Hydropower is energy that is generated by using the energy of moving water (National Geographic, year unknown). For generating hydropower, there is a difference in height needed for rain- or river water to flow down as fast as possible. How faster the water flows, how more energy can be generated. The climate on Alonissos is generally dry and it rains not very often. There are also no large rivers. This option of generating energy is not the most profitable way for Alonissos to use renewable energy. The island has high mountains but not a large quantity of water that can be used for this.

Sea(water) energy

This form of producing energy is very suitable for Alonissos, since it is an island. This is still a new form of generating renewable energy. There are different ways to generate energy from the sea. Most of these ways use waves to create electricity. There are also systems who generate energy from the influence of the tides, and also one who uses the same concept as hydro energy (Soteris A. Kalogirou, 2005). This idea includes an empty basin in the sea which is located underneath sea level. The tides do the work; when it is flood and water level is high, locks in the basin can be opened and water fills the basin. This goes with a lot of power. As soon as the water flows through the locks, generators transform this power into electric energy. Scientists are still experimenting with this concept since it is recent discovered.

Costs and availability

Recommended is hiring a specialist for giving realistic and complete information about sustainable energy options on the island. To make a kind of sustainable/renewable energy work, there are a lot of factors that influence the success. For example natural factors do influence this a lot. Also the sustainability of these kinds of energy production should be closely analyzed, and what the chance is to get the invested money out of the production of energy. Again, this is very area bounded so a specialist can give a better financial advice.

1.2.3 Waste management

The waste management problem is one that is mentioned by a large amount of people, including local authorities, residents and tourists. The main two problems are the lack of recycling and the fact that there are not enough rubbish bins (mainly on the beaches) (QualityCoast Visitor Survey, 2013).

Something that is also mentioned is the fact that in peak season bins are too full and are not emptied on a regular basis, at least not regularly enough.

Recycling

In September 2013, a recycling system has been implemented. There are blue containers available for glass, plastic and paper. These three items will then be separated again by employees of the
municipality before shipping and will be sent off to the mainland separately. Since this initiative only started a few weeks ago, big developments must still be made. As earlier mentioned in this report, there is lack of information and also about recycling. Most tourists come out of countries where recycling is already introduced for years and they are known with the concept. This is already integrated in their life. Out of the questionnaires it appears that they do recognize the recycling bins often, but not always contribute actively. The development of recycling itself on the island does not go without problems. Out of conversations with locals appears that they are skeptical about it and it appears they are not enough informed about why they should contribute with separating their garbage. Once a week the recycling bins are emptied and taken by a big ferryboat. This costs money and is expensive. The recycling depends on the ferry; when the ferry does not come for a reason, the bins will not be emptied. The information local people got about recycling was from people from Athens.

Advice to integrate the recycling more on the island is that children must get lessons about recycling at school. They take their knowledge with them at home and can tell their family about it. This is an indirect way of introducing recycling and it can make the local people less skeptical about recycling, because they hear it from people they know better and trust more.

**Rubbish bins**

In the QualityCoast Visitor Survey there are multiple people complaining about rubbish on the beaches. Partly this might be waste washed ashore, another part will be wasted left by visitors (because of the lack of rubbish bins on the beaches).

A very simple solution for this would be to have more facilities regarding rubbish bins on beaches in combination with hiring extra employees in the peak season to not only empty bins more regularly, but also collect waste from beaches. This being said, the initiative at the beginning of the season, the beach clean-up, is a very good one, and should be continued in the future. Signs at beaches can be helpfull too, so tourists are confronted more with leaving their rubbish on the beach.

### Sustainable transportation

From our own experience and from QualityCoast Visitor Surveys it is noticed that the public transportation could be improved. Not only did the bus not run until mid-June in 2013, also nobody knew when exactly it would start running which left tourists as well as residents in uncertainty. When searching for information online about local transportation you will be left unsure since most website (including Alonissos.gr) indicate that busses run “during the summer”, but without any specifications. Running the bus more frequently and/or for a longer period of time will also contribute to the sustainability of the island because more people will feel confident enough to rely on it and that means less people will rent a car. In addition to that, the lack of a whole island tour does not contribute to the sustainability of Alonissos for that same reason. At the moment the main way to explore the island is either by car or motorbike. However, if there was an “around the island tour” available less people might rent cars and more people might choose to do this tour instead.

A feasibility study should be done in order to find out the chances of a project like this.
Another indicator of the application for is the amount of places that rent bicycles. Unfortunately there is only one place at the moment that rents out bicycles. Although the island is relatively hilly, riding a bicycle in not impossible and multiple tourists have indicated that they would be interested in renting a bicycle depending on the weather and the price.

Again, a feasibility study is recommended to determine the likeliness of this project to succeed.

As a replacing option for the rental of bicycles, electronic bicycles could be a solution. It is easier to travel because of the hilly character of the island and could make it more attractive to rent a bicycle. There are various kinds of electric bicycles, but the ones with motors driven on batteries are recommended in regard to sustainability. Recent studies in China (a country with over one million e-bike owners) show that, even including emissions from factory production and electricity that is needed to power them, e-bikes can perform better than electric cars. They produce only one tenth of the amount of CO₂ (Zambrano-Barragán, P. 2013).

1.2.5 Monitoring tourism data

Collecting and monitoring tourism data is of great importance for a destination. In order to plan tourism development on the long term, data about tourism arrivals and departures are necessary along with data about the profile of visitors, their satisfaction and their needs and wants. So far this has been lacking on Alonissos, this is the first year a research of this kind has been conducted. Recommended is to continue similar projects in the future. If these projects are too costly to do on a yearly basis, it could be considered to do you a five yearly basis.

There are different kinds of projects to measure different kinds of data about the tourism on Alonissos. It could be useful to follow the development of different projects to make sure what kind of research is the most efficient for an island as Alonissos. This is also important because the situation of Alonissos and it’s tourism will change over the years and it is important to keep collecting data successful within these changes.

An important GSTC criteria is to make information, such as tourist satisfaction, available to visitors of a destination to make them more aware. Since Alonissos just designed a new website, it shouldn’t be complicated to make information of this kind available for public. With making this information public, it is encouraging to tourists to carry out more responsible behavior for sustainability and the nature of Alonissos.

1.2.6 Water management

In regions where water is scarce, which a SIDS is a very good example of, the tourist water demand can generate big problems of sustainability, especially when tourism is seasonal (Deyé-Tortella, B. & Tirado, D, 2011). Given the shortage of literature on the subject, further research into the tourist water demand is required, with particular attention to the hotel sector, since hotels are the most popular option for tourists, displaying higher levels of water consumption.
With only around 2% of Alonissos being permanent open water and no operating water plans so far, Alonissos struggles with providing everybody fresh water in the peak season. One possible solution that is used at the moment, are the water cuts in peak season, in which case only some people in Patitiri have water one day, and the other day the other people have got access to fresh water.

One solution for this fresh water problem is the water dam that is being built on the North side of the island. However, so far there is only the ‘lake’ itself, without water in it or pipes connecting the lake to houses in Patitiri. This is a good initiative and should be continued and finished shortly.

However, on the awareness side there is still a lot to improve. Not many hotels have signs reminding tourists they are on a small island with limited fresh water resources. Also a campaign amongst residents would be in place again as well as informing all residents about exact hours the water cuts take place so they are aware and prepared for these.
2.1 Tourism market of Alonissos

This chapter will give insight into the main markets of Alonissos and their characteristics, mainly based on the basis of the QualityCoast Visitor Survey. A questionnaire has been distributed during the months of May till September which is the base of the information in this chapter when looking at characteristics. This was done in cooperation with some restaurants and hotels on the island in order to collect as many questionnaires as possible. The restaurants and hotels were as much spread out over the island as possible so that a wide public would be reached. Because there was no existing data available on tourism arrivals per year, the ferry arrivals of 2012 are used to calculate an approximate number of tourism arrivals in 2012. In all other sub chapters, data from the QualityCoast Visitor Survey are used with the exception of nationalities. Since more accurate and extensive data were available from the Alonissos museum, these were used instead.

2.2 Arrivals

With just under 28,000 arrivals in 2012 compared to 16,5 million arrivals to Greece in 2011 (Mintel, 2012), Alonissos only accounts for a small part of inbound tourism to Greece. However, the population size of approximately 3000 inhabitants is outnumbered with a ration of 4 to 1 in August, making tourism an important aspect of the islands economy.

In order to get the most recent and most accurate information data from 2012 have been used in order to determine annual tourism arrivals and their division over the different months of the year. Since no data are obtained by the municipality concerning tourism arrivals, numbers of ferry passengers have been used. In order to reach the island, one of the ferries needs to be used with exception of private helicopters, of which the number is significantly lower. Only 5% has been taken out for day visitors since ferry schedules make day trips from and to the island difficult (openseas.gr, 2013). If people are interested in visiting Alonissos for a day, there are multiple day trips to the island from the other islands in the Sporades, Skiathos and Skopelos. These trips are better value and have a lot better time frame. However, theoretically it would be possible to make a day trip to Alonissos by public ferry on some days, but since it is not possible to find reliable data on this, the percentage of 5% is taken into consideration after collecting information from qualitative interviews.

Something that was already stated by many tourism stakeholders, but was proved by the data from the ferry arrivals, is that August is the absolute peak month with around 7 times as many arrivals as in May. The main reason for this is the Greek and the Italian holiday season that takes place in the month of August and the fact that they are the main visitors to Alonissos in that month (Efstathiou, K, 2013). The total amount of visitors in the months May, June, July, August and September is 27471 arrivals.
Most arrivals to Alonissos depart from the port of Volos. This is mainland Greece, accessible by airplane from different European countries as well as by bus from most Greek cities. Second most people depart from Skiathos which is explained by the presence of an airport on Skiathos serving most charter flights during the holiday season.

As said before, not many data concerning arrivals are recorded, so making comparisons to former times is difficult. However, one research done in 2000 gives an approximate number of tourism arrivals in the years 1999 and 2000. As can be seen in the graph below, the tourism numbers have gone down compared to the year of 1999 and 2000. Based on interviews with stakeholders this is due to the economical crisis that hit Greece very hard. This reflects in visitors numbers since the main visitors in the months of July and August are the Greek.

2.3 Visitors profile

“"A visitors profile is a description of visitors based on demographic and behavioral characteristics, such as age, income, accommodation preferences, travel party size, season of travel, etc, as well as spending behavior." (www.azot.gov, 2013). Having a clear understanding of what visitors to Alonissos “look like” will help to make better marketing decisions, project funding decisions, product development decisions and revenue planning decisions. After making a visitors profile, it will be clear if the people visiting the
area are the people that are targeted. If the visitors profile does not fit the current marketing strategy, strategic changes to the marketing could be made to target the desired audience. Target marketing is found to be more cost effective and successful than non-targeted advertising or promotion. (www.azot.gov, 2013).

As said before, all results are analyzed per month as well as for the whole periods a total. Only when there are striking differences between the months they are mentioned, if not, the conclusion is given for the average of the total of the three months.

2.3.1 Repeat visitors; Alonissos, Greece & possibilities for low season

Questions 1, 4 and 11 of the QualityCoast Visitor Survey

Alonissos

The average percentage of visitors that have been to Alonissos before is 36.84%. In May 2012 only 22.03% of the visitors had been to Alonissos before and in June the amount of tourists that had been to Alonissos before was approximately the same as the ones that had not been to Alonissos before. In July the amount of visitors that have been before on Alonissos was even less than June: 39.02%. In August the percentage was 42%, a little bit higher than July. In September there was the lowest percentage of these five months: 26%. This is logical because the tourist season almost ended. To give a more complete view, these numbers are shown in ( ). Notice that the percentage over all measured months together, the percentage who have been to Alonissos before 36% is.

Graph 2.1. Visitors who have been before on Alonissos per month
**Greece**

One of the most striking data was the amount of visitors that had been to other Greek destinations before. 94.2% of all visitors in the months of May till September had been to Greece on previous holidays. Since this number is significantly high, the data of this question are used for making marketing recommendations that you will find in the next chapter.

**Possibilities for low season**

One of the expectations in research proposal was to research the possibilities to lengthen the season since tourism to Alonissos currently is very seasonal. In the QualityCoast Visitor Survey the question was asked whether people would visit Alonissos again in the month of April and/or in the month of October (months that are outside the current season). Unfortunately reaching Alonissos in these months is difficult and time consuming. Exactly 55% of the respondents said they would like to come back in April; circa 35% of these respondents referred to the weather as the main reason to come back in April (most of the time respondents specify they prefer the cooler weather in April over the warmer summer months). The other 45% that indicated they would not like to visit Alonissos in April; 45% of these respondents also gave the weather as their main reason, in this case most likely because the weather would be too cold for their liking. However, this was not specified by participants in all cases. For October result are similar with 52% indicating to be willing to come back and the other 48% not willing to come back in October. Again weather was the main reason for both options, with similar percentages compared to April.

Unfortunately the main reason for both October as well as April was an external one, namely the weather, something the destination does not have any influence on. Partly because of these data, and because of the difficulty of reaching Alonissos in the months of April and October (see chapter 3. Accessibility), it is decided not to make recommendations to lengthen the season.

If there is any chance to improve the difficulty of reaching Alonissos in the months April and October, recommendations can be made. In winter season the island is very quiet. Much inhabitants are returning to the main land to continue with their studies or other work. Still, the weather is less attractive but this can create a market for indoor activities. The weather in the month October is around 20 degrees, the sun does shine often and it does not rain often. This month could be used to extend the tourist season. Activities as yoga can be held indoors and the weather still suits for sea kayaking. Alonissos' nature and temperature is not the best at that moment, but other parts of its culture can be used to make holidays attractive in another manner. Traditional events and feasts is an example.

**2.3.2 Average length of stay**

*Question 2 of the QualityCoast Visitor Survey*

In the QualityCoast Visitor Survey undertaken on Alonissos from May 2013 until and including July 2013 all overnight stays that include 1 night or more are taken into consideration to calculate the average length of stay. Since the question in the QualityCoast Visitor Survey is about days (and not overnight stays), all questionnaires with the answer 2 days or more are taken into account. Stays longer than 60 days are not taken into consideration since there is a large chance that
these are foreign residents with houses on the island and don’t count as regular tourists (in-depth interview, 2013).

The average amount of days on Alonissos in May 2013 was 7,2 days, in June 2013 it was 10,6 days, in July 2013 it was 10,4 days, in August 2013 it was 12,6 days and in September 2013 the average amount of days tourists stayed on Alonissos was 8,2 days. This lead to an average of 9,8 days over the three months.

Compared to Greece with the average length of stay of visitors being 5,4 days on a holiday to Greece, this is relatively long (Mintel, 2012). One of the explanations of this longer length of stay is the relatively long travelling time to the island which makes people want to stay longer (travelling time compared to actual time on destination).

2.3.3 Choice of accommodation

Question 3 of the QualityCoast Visitor Survey

On Alonissos different types of accommodation are available; hotels, rooms to rent, villas and private accommodation also accounts for a small part of the accommodation of tourists. The division between these is as following:

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>15</td>
<td>18,75%</td>
</tr>
<tr>
<td>Rooms to let</td>
<td>56</td>
<td>70%</td>
</tr>
<tr>
<td>Villas</td>
<td>9</td>
<td>11,25%</td>
</tr>
</tbody>
</table>

*Table 2.2.3 (Alonissos.gr, 2013)*

Most of the tourists stayed in hotels, 72,5% (rooms for rent are included in this percentage since the difference was difficult to determine, 9% stayed in rented villas and 9,38% stayed in private accommodation (with family or friends). Another 9% of visitors stayed on yachts, most of the time part of flotillas. Since the difference was not significant between the different months, an average over the whole period is taken (May till September)(QualityCoast Visitor Survey, 2013). The percentages of accommodation correspond quite accurately with the percentage of accommodation people said they stayed in, from which can be concluded that the demand and supply in accommodation are in balance. This is also shown by the fact that in the past 5 years no new hotels have been built, only several private villas have been built on the island (Anagnostou, Z., 2013).

2.3.4 How did visitors hear about Alonissos first

Question 5 of the QualityCoast Visitor Survey

An interesting question for further marketing recommendations is about how people first hear about the destination. The options given in the questionnaire were via a tour operator of travel agency (a), via
friend and relatives (b), on independent websites about the island (c), via social media (d) or a day excursion to the island €. People also had the option to give different ways under “other”.

Graph 2.2.4: how did visitors first hear about Alonissos

As the graph above shows, there are three main ways for people to find out about Alonissos. The way most people heard about Alonissos first was through friends, family and relatives. Partly because of this result, a marketing recommendation is made concerning visiting friends and relatives tourism. The other two main ways are through travel agents and tour operators and via independent websites. These two are also mentioned in the (general) marketing recommendations.

2.3.5 How did visitors travel to Alonissos
Question 6 of the QualityCoast Visitor Survey

Currently Alonissos depends for approximately sixty percent on independent travelers. The fact that only 36,9% travelled to Alonissos by organized travel (28,57%) by a package deal via a tour operator or travel agent plus 8,33% that came to Alonissos as part of an island hopping package in which they visit Skopelos and/or Skiathos as well) is positive because this means less leakage for the destination. The higher the percentage of independent travelers, the less leakage and the higher the economic contribution of tourism will be to Alonissos.

2.3.6 Travel company, age and household lifestyle
Questions 14, 16 and 17 of the QualityCoast Visitor Survey

Other characteristics interesting in creating a visitors profile are like travel company, household lifestyle and age. These are mentioned in one chapter because of the connection between the three of them.
Approximately 60% of the visitors are elderly couples from the age of 51 and up, which accounts for the largest segment of visitors to Alonissos. In 63% of the cases visitors travelled with their partner. The age of the most common tourist is between 51- 60 and 60+, with only one percentage difference (28% and 29%). This image of the main segment was already sketched by tourism stakeholders, but confirmed by the results of the QualityCoast Visitor Survey.

### 2.3.7 Expenditure & income

**Questions 18 and 19 of the QualityCoast Visitor Survey**

Other demographic data asked for in the questionnaire were daily expenditure and yearly income. Although the question about yearly income was the one with the lowest number of responses (74% of visitors filled out the question), conclusions will still be drawn. Yearly income is very much spread out, with a range of 5 different options ranging from the lowest category €0 - €25.000 per year per household to the highest category €100.000 or more per year per household. All 5 options received approximately the same percentages, with the three lowest categories representing a slightly more answers, 70,4% of all valid answers.

Connecting nationalities with daily expenditure was very difficult due to the number of questionnaires collected and the fact that not many Greek people filled in the questionnaire. Indicated by restaurants was that in general Greek tourists were their best customers, spending most money. However, since two years the number of Greek tourists has declined together with their daily expenditure. Unfortunately this cannot be proved with data due to the low number of Greek respondents (see chapter 4. Limitations).

### 2.3.8 Activities on destination

**Question 7 of the QualityCoast Visitor Survey**

Although “activities” are considered the least important motivation of going on a holiday to Alonissos (see next subchapter 2.2.9), in the questionnaire people were asked what activities they had done so far or were planning to do on their holiday in Alonissos. A few activities stood out under which ‘relaxing on Alonissos beaches’ which almost 80% of people did or were planning to do, and ‘walking/hiking’ which was mainly popular in June and July. Another stable activity was visiting the museum with an average of 43% of the people visiting the museum. However, this number might not be trustworthy due to limitations (see par. Limitations). Less popular activities are scuba diving, kayaking and doing yoga.

### 2.3.9 Travel motivations

**Question 9 of the QualityCoast Visitor Survey**

To find out what attracts people to visit Alonissos, visitors were asked for their travel motivations. “Nature” came in the first place and “Clean environment” and “Off the beaten track” shared the second place (Graph 2.2.10). Travel motivations should be taken into consideration when developing marketing
strategies and campaigns and these aspects should be stressed when doing so. General marketing recommendations are given based on these results.

![Graph 2.2.9: travel motivations]

### 2.3.10 Satisfaction rate; likely to come back & recommendations

**Questions 10 and 11 of the QualityCoast Visitor Survey**

The QualityCoast Visitor Survey had two questions focusing on the satisfaction of visitors. The first one was about how likely people were to come back to Alonissos in the next 5 years, the second one about how likely they are to recommend Alonissos to friends and family. Comparing the two questions, mainly the results of the recommendation question were very high, with an average of 8,84 out of 10 over all three months. The likely to come back question was rated slightly lower with an average of 4,02 out of 5 (which would equal to an 8,04 out of 10) over all months. People gave willingness to visit other places in the world as a reason for a lower score, together with availability of time which explains the lower score compared to question 12 about recommendations.

### 2.3.11 Generating countries

**Question 15 of the QualityCoast Visitor Survey**

Although country of origin was one of the topics of the questionnaire, this information is not used to draw conclusions. The reason hereof is the availability of more accurate data on countries of origin. The Alonissos Museum that is run by the Dutch Oosterveld family has been collecting data on nationalities for the past 4 years. Approximately 10% of the total arrivals visits the museum, which makes these data relatively reliable. The data of 2012 were made available for this research and after further research the data could be used to determine the different nationalities per month. These data are taken as a reflection of the total number of arrivals.

The biggest visitor generating country differs per month but was in general Greece. 42,83% of the total amount of visitors to Alonissos in 2012 was from Greek origin (graph 2.2.11). However, as said before,
the number differs per month. In July and August Greece is the main generating country, but in all other months researched, May, June and September, the United Kingdom is the biggest generating country (graph 2.2.11), with a total of 23.23% of tourism arrivals over all the five months.

Graph 2.2.11: Nationalities per month based on data of the museum on Alonissos

Graph 2.2.12: Nationalities in the months May till September based on questionnaire data on Alonissos.
In Graph 2.2.12 is shown the data out of questionnaire data about the nationality of tourists during the whole research period. Clear is, with all research months together, tourists from the UK are the most present. What is surprising is that the data of the museum points out the presence of a lot Greek tourists. The explanation for that is that Greek tourists rather fill in a Greek questionnaire than an English one, so they refused. The same can count for Italians, although they were more willing to fill the questionnaire in. The idea of translation of the questionnaire occurred in the middle of the research period. The Greek people on Alonissos were too busy with working to translate the questionnaire and it would affect our research results in such a way that we chose to keep the English ones.

Furthermore, in the graph is shown that there a few countries with the number one. That means that there are only very few tourists who came to Alonissos from those countries, it would be interesting to keep collecting data about this so maybe some development can be shown.

Near the UK, Greece and Italy, The Netherlands and Germany are the most visiting countries (based on data from the museum and questionnaires together ). There can develop some changes in this with influence on financial situations, which are not only negative. Northern Europe (Sweden, Norway) can be interesting visiting countries in the future.

2.4 Marketing recommendations

Since data about tourism and tourists on Alonissos were lacking so far, this was another important aspect of this project. The QualityCoast Visitor Survey was conducted to create a visitors profile which is necessary again to target specific markets and therefore uses the marketing budget more effectively.

In this chapter several marketing recommendations are made with a focus on ‘Visiting Friends and Relatives Tourism’ ("VFR") which seems to fit Alonissos very well. Other recommendations are made about ‘Greek Specialists’ due to the high percentage of people that have been to other Greek destinations before and are specifically looking for an authentic, real Greek experience. Also marketing within Greece is part of this recommendation. Last there are also general marketing recommendations given to improve the overall character of the marketing of Alonissos.

The marketing recommendations are both based on own experience plus the professional view of QualityCoast employees on the situation as well as on the profiles of people visiting Alonissos.

2.4.1 VFR Tourism

Although definitions about VFR differ, the following definition is generally accepted:

“People who cite that their major purpose of visit is VFR are also staying with friends and relatives, or that people who are staying with friends and relatives but that do not state VFR as their main purpose of visit are not VFRs.”

Generally, VFR was found to be one of the primary motivations for both domestic and international travel to many destinations (Morrison & O’Leary, 1995). Although VFR has not received as much
attention with marketing of destinations, VFR does account for a relatively large part of tourism. VFR is a vital market for many niche destinations with limited resources that find it difficult to compete with top destinations (Morgan, Pritchard, & Pride, 2002), which may be the case for Alonissos. Not only does it account for a large part of tourism, it also has multiple advantages over ‘normal’ tourism such as a longer average staying period, a higher return rate and VFR tourism spreads more evenly over the year which makes it less sensitive to seasonality (Shani A., 2013). Another advantage is the fact that overall VFR brings in more money since not only the tourist spends money in this case, also the friends or relatives that are visited are spending more money than they normally would on things such as food and shopping.

Another positive side of VFR is that the visitors also feel more like home rather than being a tourist. The host can show and recommend places to the visitor which will elevate the tourism experience (familiarity with place, privacy and situational control and sociability in associations, hosts usually are well acquainted with the local attractions and they can recommend places to you) (King, 1996).

VFR tourism is also believed to be growing due to the rising popularity of online social networks, such as MySpace and Facebook, which increase the opportunities to both make new friends and sustain old friendships. Consequently, people have more friends and relatives to visit than ever before and VFR has become an integral part of the lifestyle of many (Hay, 2008; Williams & Hall, 2000). Also VFR has also been shown to be more resilient in low economic times (Backer, E., 2008).

There are multiple why VFR suits Alonissos well;

- Big expat community so a lot of opportunity for VFR tourism
- Alonissos has a problem with seasonality, VFR tourism is known for being less seasonal
- Alonissos is niche destination with limited resources, so VFR is vital market
- VFR presents cost-effective segment in marketing effort, good with limited marketing budget of Alonissos.
- VFR are more loyal in returning to Alonissos, since family or friends live there.

Although the VFR market is more difficult to target, there are multiple success stories (Duval, D., 2003). VFR also presents a cost-effective segment to reach through marketing efforts. Since VFRs rely heavily on the advice from word of mouth rather than other marketing means (Backer, E., 2008) it is important that tourism operators and other businesses interested in attracting VFRs market to the local community.

There are several programs that can encourage and stimulate VFR travel;

- Using local residents as a source of a database for direct mail advertising;
- Providing tourism brochures and other collateral materials to local residents;
- Direct marketing and media advertising to residents to encourage them to invite their friends and relatives to visit;
- Media advertising in places where significant numbers of former residents or their families reside or in the case of Alonissos where expats come from, mainly UK in this case;
- Staging "homecomings" or "reunions" for former residents and their families; and
• providing incentives for former residents or their families to "return home." (Morrison, A.M., Hsieh, S. & O’Leary, H.T., 1995)
• Discount coupons and deals for friends and relatives of residents;
• Distribution of invitation postcards to potential local hosts for mailing to friends and relatives.
• Column in local newspaper encouraging locals to invite VFRs; and
• Education and awareness-building activities featuring local tourism attractions, events and facilities
• Sending emails from studios or hotels to tourists who visited earlier to keep them up to date and ‘remember’ them about their holiday and the improvements now.
• Advertise in the form of little presents like an Alonissos welcome goodie bag with typical products of the island to create goodwill

2.4.2 Greek specialists

Due to the very high number of visitors that have been to Greece (mostly multiple places) before visiting Alonissos, two recommendations are made based on this information. The first recommendation is to focus on Greek ‘specialist’ agencies and/or tour operators. Both in the focus group as well as in several in-depth interviews, tourists indicated that they actively searched for a “real and authentic Greek destination” (focus group & in-depth interviews, 2013). This is one of the points that Alonissos should focus on, since being a real and authentic Greek destination is one of its strengths. Moreover, people that have been visiting Greece for years in a row indicated that coming back to the same destination, in this case Alonissos, would definitely be a possibility. In contrast to people that had not been to Greece before, or only to fewer places, that indicated they enjoyed their stay on the island but were not likely to come back with the reason of the availability of so many other destinations around the world. Since repeat visitors are very valuable to a destination, they are believed to be 80% more profitable compared to first time visitors, this should be a group to focus on. Understanding current customers is an important part of making them come back as repeat visitors (Oppermann, M., 1996). The second recommendation is to promote Alonissos within Greece. Not only to attract Greek visitors (since in 2012 they were by far still the largest tourist number), but also to attract international visitors to Alonissos. This way, when they are on holidays to other Greek destinations, they will become aware of the existence of Alonissos and the product it has to offer. The main Greek destinations where visitors have been before are Athens and other Greek islands such as Corfu, Crete, Skopelos and Mykonos. For more specific information, please find the excel document “Results QualityCoast Visitor Survey Alonissos; May, June & July” attached.

2.4.3 General marketing recommendations

To conclude the marketing recommendations, more general recommendations are given. Up till now marketing has not been based on the characteristics, wants & needs, life style, travel behavior and so on of actual visitors. It is found however, that using target marketing, using the type of details described above, is more cost effective and successful than non-targeted advertising (www.azot.gov, 2013).
One important issue is what to focus on in marketing. Alonissos should make sure they profile the destination as being unique for the combination of green/nature, authenticity & friendliness as a host community. This was confirmed by the questionnaire in which people indicated that their main travel motivation to visit Alonissos was nature, second came the clean environment, third the friendliness of the host community and just after that the local identity of Alonissos. Since Nature is considered very important with an average rate of 4,5 out of 5, one suggestion would be the promotion of the QualityCoast Gold Award. At the moment nothing specific is mentioned on the website about winning the award and also on the destination itself there are no clear signs that indicate the award. Aspects that were rated as least important travel motivation, were the activities on the destination. However activities which contains enjoying the nature of the island is regularly mentioned, to be more accurate hitchhiking or walking. Price was also not considered as an important factor to come to Alonissos together with accommodation and restaurants. Looking at the website Alonissos.gr now, a few of the travel motivations that are not important for visitors (accommodation and activities) are main issues on the website; this needs adjustment when we look at the travel motivations of visitors.

Another important marketing aspect is how people find out about the destination. From the QualityCoast Visitor Survey it can be concluded that friends and relatives are the biggest source of information with travel agents or tour operators coming after that. A particular recommendation is already made for both sources. Since multimedia or social media is the last likely way how people find out about Alonissos as a holiday destination, but still is a market that has grown big in the last years, it could be an opportunity to explore this market and involve this in a marketing plan.

Also generating countries and their characteristics and dynamics are important. Although Greece is the main generating country for visitors to Alonissos, the current economic conditions of the country should be considered when dividing the marketing budget of different countries. The UK is a more stable visitor generating country with also a more stable economy. Another important upcoming market might be the various Scandinavian countries because of their positive financial situation. Time of travelling should also be taken into consideration when looking at generating countries, since people from different countries tend to travel in certain months more than others.

Near the early discussed Greek tour operators and/or agencies, it is also a recommendation to attract eco-friendly tour operators. This can help strengthen the market message towards tourists what Alonissos’ best features are: nature and environment. Also, by talking with various tourists who have experience with booking at certain eco-friendly tour operators, it becomes clear that some of them have very loyal customer base who are likely to book at these tour operators again.

Although almost all questions in the questionnaire are material for marketing recommendations, not all are mentioned due to the fact that further research is needed to investigate these and also due to the fact that the research has not been finished yet.
3.1 **Accessibility of Alonissos**

*Introduction*

The aim of this research was to find out about the accessibility of Alonissos in connection with seasonality as a sustainability aspect. This aspect is addressed by the QualityCoast Policy Award. The fact that flight times and ferry schedules are not connected well is shown in this report (with practical examples and schemes). Also recommendations for solutions are made and a general conclusion is drawn. Attached more detailed schemes can be found.

*Executive summary*

After thorough research into flight times and their connection with ferry times it can be concluded that the connection between flight times and ferry schedules is not optimal for the month researched, in this case May. Different destinations with different flight times were assessed including flights from the UK (Manchester, Bristol, Gatwick & East Midlands), Germany (Frankfurt & Munich), Austria (Vienna), Italy (Milan), Belgium (Brussels) and Greece (Athens). The flights taken into account are all individual aircraft seats that are not part of a holiday package. These flights were into two different towns, Volos and Skiathos, from which the ferry connection was researched. The best connection is the direct flight to Skiathos with a global estimate of 10’45 hours to reach Alonissos from the main European destinations, second comes Volos. The worst connection is the one via Athens with most overnight stays especially when the international flight into Athens is taken into consideration as well.

*Skiathos*

The best connections in general are from the UK into Skiathos and, with an inbound travelling time of 9’40 hours and an average outbound travelling time of 13’10 hours, back to the UK. All transfers to and from Alonissos are on the same day, no overnight stay is required. However, these flights are only available from May 2013 on (some only the end of May) and not before May. There is one flight from Munich that requires less travelling time with an of 6’28 hours, but that only started 23rd May 2013.

*For full schedules to and from Skiathos see appendix 3.1, Connectivity Skiathos*

*Volos*

Then the second connection examined is the flight into Volos and the ferry connection to Alonissos from there. This resulted in an average of 18’20 hours inbound travelling time to reach Alonissos and 15’55 hours to get back to destination of origin. This is the longest time of all options, and an overnight stay in Volos is required in 44% of the cases.

*For full schedules to and from Volos see appendix 3.2, Connectivity Volos*

*Athens*

The last option examined is the daily flight from Athens to Skiathos and the ferry from there to Alonissos. This would be the case for any destination that does not have a flight into Volos or Skiathos
and thus for all flights coming in from outside of Europe. Also in this option a distinction is made between the way from Athens to Alonissos and the way back, from Alonissos to Athens but in this case there were major differences between the two. For the way to Alonissos the travelling time is the second longest with an average of 18’33 hours minutes; and in 6 out of 7 cases an overnight stay (on Skiathos) is.

The way back is more favorable with an average travelling time of 13’07 hours to go from Alonissos to Athens and only in one case an overnight stay on Skiathos is required. However, since most of the flights arrive to Athens fairly late, the chance that an overnight stay in Athens is required must be taken into consideration.

For full schedules to and from Athens see appendix 3.3, Connectivity Athens

Thessaloniki

There used to be a ferry connection between Thessaloniki and Alonissos. This connection is unfortunately cancelled. This connection is mentioned regularly by tourists within the questionnaires. This ferry connection used to be one of the easiest way to visit Alonissos and people do notice it’s absence.

Possible solutions

The best solution for the problem of the bad connections between flights and ferries would be to have smaller vessels operating more frequently. At the end of May 2013 an additional ferry service was introduced. However, instead of operating at different times than the already existing vessels, the additional service operated at the exact same times (most likely for competitive reasons). Introducing a new vessel could have solved some of the connectivity problems, but instead they chose (and were apparently allowed) to operate at the exact same times.

To make this option more sustainable, cleaner versions of boat motors could be used to compensate the emission of more frequently connections. This could also be used in a way to attract eco-friendly tourists. The identity of Alonissos is partly about the nature friendliness and protecting the area. Since Alonissos is located in the largest protected marine park of Europe, this could be a way to emphasize Alonissos’ identity and therefore attract more eco-friendly tourists. In this way, the ferries could be not only a way of travelling but also a part of the eco-friendly experience which could be more preferable for the kind of tourist you want to attract.

here is also a possible solution in making travelling by boat easier with re-using the old ferry connection Thessaloniki-Alonissos. In this way, the people that arrive in Thessaloniki won’t have to travel with public transport to Volos for getting on a ferry. This

Another realistic solution would be adjusting the ferry schedule according to flight arrivals. Hereby a general suggestion is made for an adjusted ferry schedule that would reduce travelling time and also reduce the amount of overnight stays (table).

Improvements that can be made on the ferry system can enlarge the accessibility of a broader variety of tourists, for example families. People with children are less flexible than adult tourists in couples or alone, and so would they be more likely to choose for an easy way of travelling. Nowadays, out of the results of the questionnaires becomes clear that the most popular group of tourists are couples.
<table>
<thead>
<tr>
<th></th>
<th>Ready for departure (flight to Volos)</th>
<th>Ready for departure (flights to Skiathos)</th>
<th>Existing ferry times (departure time from Volos)</th>
<th>Suggested new ferry times (departure time from Volos)</th>
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In order to make an easy to read overview of the ferry connections the following is done:

- 1,5 hours is **added** to the arrival time of flights into Volos (for luggage and transfer from airport to ferry dock);
- 1,5 hours is **subtracted** from the arrival time of flights into Skiathos. Plus 1 hour for luggage and transfer from airport to ferry dock, minus 2,5 hours for the ferry to get from Volos to Skiathos. (E.g. ferry leaves Volos at 09.00 and will arrive at Skiathos at 11.30 which allows passengers from a 10.30 flight to get on this ferry) An average of 2,5 hours is taken for the ferry journey from Volos to Skiathos. This different per vessel, but for a general overview an average of 3 hours makes it more clear.

**Conclusion**
The current connections between ferries and flights going to Alonissos and leaving from Alonissos in May are not optimal and lead to long travelling times. This does not help in broadening the season and trying to convince tourists to come earlier in the season. This puts more pressure on the destination in high season which does not contribute to its sustainability. However, the problem can be solved by adjusting ferry time table and/or adopting smaller/more vessels which will lead to more departure times on one day.

Limitations

An important limitation that should be taken into account in this research is the fact that the ferry schedule is unreliable and times change from time to time and ferry boats are added and deleted from the schedule. Since the three different connections were made on different moments in time in May, the ferry schedules sometimes don’t correspond. However, these are not of great importance in the process of suggesting new times (compared to old ones), since the new time will be the one that matters.
### 3.2 Long travelling time - opportunities

One obstacle for people to visit Alonissos is the longer travelling time and the fact they are not prepared for this long travelling time (QualityCoast Visitor Surveys & in-depth interviews, 2013). This is mainly because of the not well corresponding connections between flights and ferries which should be improved to stimulate tourism to Alonissos. However, especially focusing on the short term, changing flight-ferry connections is not achievable, but informing and preparing people on beforehand would already save some irritation. This informing should be done in a motivating way, for example by making suggestions for how and where they could spend their ‘waiting’ time.

The main connections researched are via Volos, Skiathos, and Athens-Skiathos. There are cases with waiting time up to 9 hours and flying via Volos or Athens-Skiathos almost always involves an overnight stay (it being either in- or outbound). Rather than seeing the connection waiting time as a disadvantage, spending time at a different place in Greece should be promoted as an enrichment of the total holiday experience. It may well give people a broader view of Greece as a holiday destination, rather than seeing only one island, Alonissos. However, in order to make this experience enjoyable, the waiting time or overnight stay should be well prepared in advance. This way it will be easy for tourists to enjoy this part of their holiday too and no extra effort is required. Practical examples are:

- In general: a list of café’s, places with free wifi, wifi-for-guests, attractions, or places where you can find typical Greek things you can’t find on Alonissos; typical Lonely Planet info.
- When staying overnight in Volos, tell tourists what to do with buses and taxis; recommend a value-for-money hotel or pension near the ferry (with wifi); a local style souvlaki place; find the glycoumades (with honey or chocolate sauce) kiosk and try it!; nice bars for the night, etc, etc. Another example would be making arrangements with one or multiple hotels in Volos for an airport pick up and giving people a map with points of interest in Volos.
- For tourists that are waiting in Skiathos, arranging & recommending a café in Skiathos where people can drop off their bags, use facilities (toilet, wifi, etc) and get changed so they are ready to explore Skiathos for a few hours.
- For Athens the options are numerous due to the wide variety of interesting sites and possibilities for overnight stays. Why not even consider booking a day extra in Athens?

Recommendations for Alonissos.gr

At the moment the only information available on the website under the heading “How to get here” is the following:

“You can reach Alonissos either by ferry from Volos, Agios Konstantinos and Kimi ports or by plane to the neighbouring airports of Skiathos, Skiros and Nea Aghialis (Volos).

Please refer to local travel and tourism agencies for more information.”

Extending this information with information about possible waiting times and suggestions for enjoyable ways to spend this waiting time as part of the whole holiday experience might lead to a better understanding and less frustration regarding the long travelling times. Also, stressing the duration of the
waiting time and advising the tourist to pay attention to this makes the tourist more willing to prepare better to come over the time.

4.1 Limitations of the research

There are several limitations to this research of different nature. Firstly, and a big limitation is the fact that official Greek documentation is always in Greek. Almost never are the same documents available in English (so translation was need, but not everything could be translated due to time issues of both translator as well as writer). Another limitation was the fact that so far not many data about tourism to Alonissos had been recorded. This made making comparisons between former and current times difficult.

A limitation regarding the QualityCoast Visitor Survey is the distribution. The intention was to only distribute the QualityCoast Visitor Survey in neutral places such as cafes and restaurants, place that are not connected to tour operators. However, it became clear that using hotels as distribution point was very productive and effective, so after consultation with all parties, supervisors, municipality and stakeholders, it was decided to also distribute QualityCoast Visitor Survey at hotels. This resulted in a larger number of total questionnaires, but a less accurate result in the questions nr 2 (average length of stay was influenced by length of holiday packages), nr 4 (how people first heard about Alonissos) and nr 6 (how people travelled to Alonissos, independently or not). Another limitation of QualityCoast Visitor Survey was the language of the questionnaire, which was only in English. This might have resulted in a lower number of nationalities other than English speaking nationalities, and most likely a lower number of Greek respondents. This was confirmed by distribution points, the level of English of Greek visitors was in many cases not sufficient to complete the questionnaire.

The question about activities also has its limitations since ‘visiting the museum’ was one of the options, whilst the museum was one of the distribution points of the questionnaire. This will have led to an elevated average percentage of people visiting the museum.

A limitation of a different nature was the planning of the whole research. Since Greek working standards are different, making appointments was not always easy. The same counted for the availability of working space, which was also not always easy.

There was also a limitation caused by the amount of tourists. Less tourists means less filled in questionnaires. You would expect much filled in questionnaires in the most busy months, but in this part of the tourist seasons there were sometimes less filled in questionnaires than expected. The explanation of this is that it was so busy with tourists, that employees of bars could not simply hand them out. This caused less filled in questionnaires as expected.

Sometimes parts of the questions in the questionnaire were unclear for tourists. For example, The last question within the table of question 9: 'Off the beaten track'. There was also trouble in multiple-choice questions; as soon as more than one answer is indicated by the tourist without a note that he/she can choose more than one answer, the answer is unusable.

Lastly, there was also a limitation in closing data of the different businesses who handed out the questionnaires. It was clear that most of the businesses closed at the end of the month. The exact data were unclear. This gave some trouble in picking up the questionnaires and this also influenced the amount of questionnaires in September.
Appendices (not included in this version)

Appendix 1. QualityCoast Award Application form Alonissos

Appendix 2 The QualityCoast Visitor Survey

Appendix 3.1 Connectivity Skiathos

Appendix 3.2 Connectivity Volos

Appendix 3.3 Connectivity Athens
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