

TOURISM SURVEY ON THE PROFILE OF TOURISTS WHO VISIT CRETE

Research and analysis was carried out by the Tourism Observatory of Western Crete and coordinated by the Department of Economics & Management of CIHEAM-MAICh, in collaboration with the Laboratory of Financial Management Systems of the Technical University of Crete, the Department of Management Science & Technology of the Hellenic Mediterranean University, the Region of Crete and the Municipality of Chania. The Hotel Owners Association of Chania, the Economic Chamber of Western Crete and the Chamber of Chania also participate in the Tourism Observatory of Western Crete, which has been operating for the last decade.

For the analysis of the research that continues to be carried out at the airport of Chania (I. Daskalogiannis), 1600 valid questionnaires were included until the end of the touristic season 2020, translated into various languages, by researchers of CIHEAM-MAICh and the Technical University of Crete. This research is co-financed by the Regional Development Fund of Crete and the Municipality of Chania. For the smooth conduct of the investigation, there is continuous support from Fraport-Greece and the Staff of Chania Airport.

Reference is made to the most recent arrivals of foreign tourists published by Fraport-Greece for Chania airport, and by the Civil Aviation Authority of Heraklion, in order to evaluate the tourist traffic in Crete so far and compare it with the corresponding period last year.

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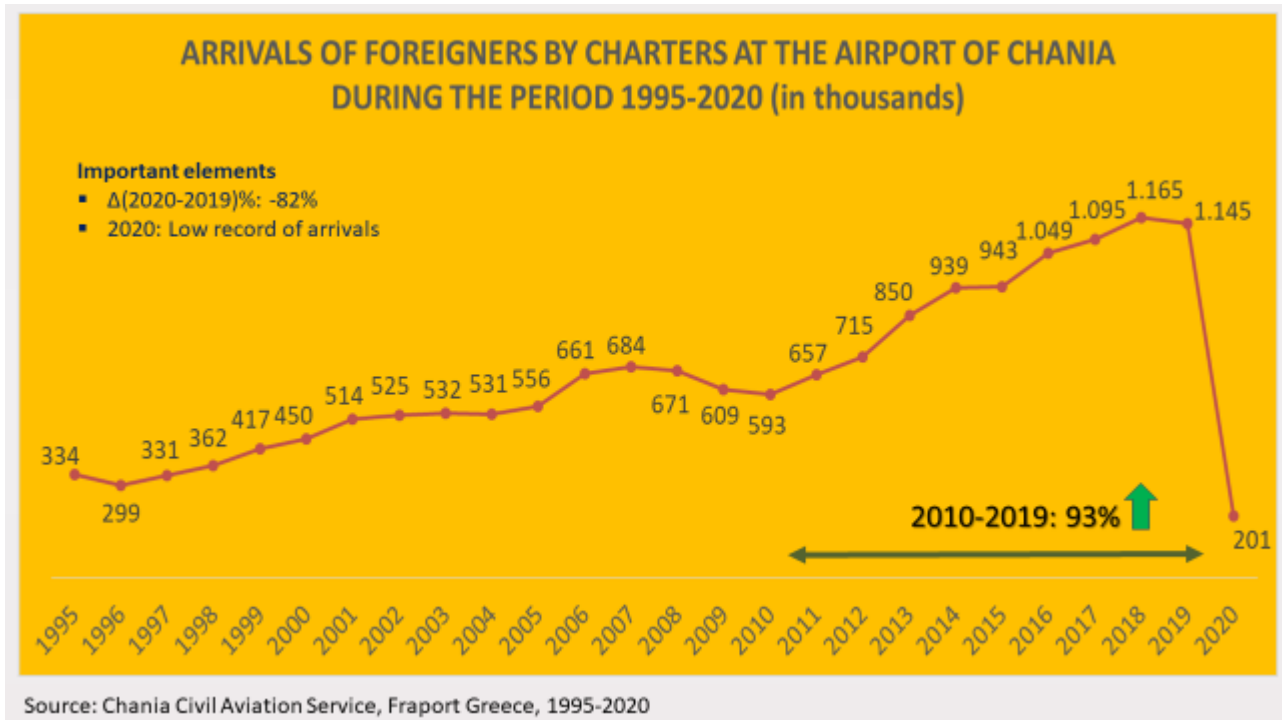
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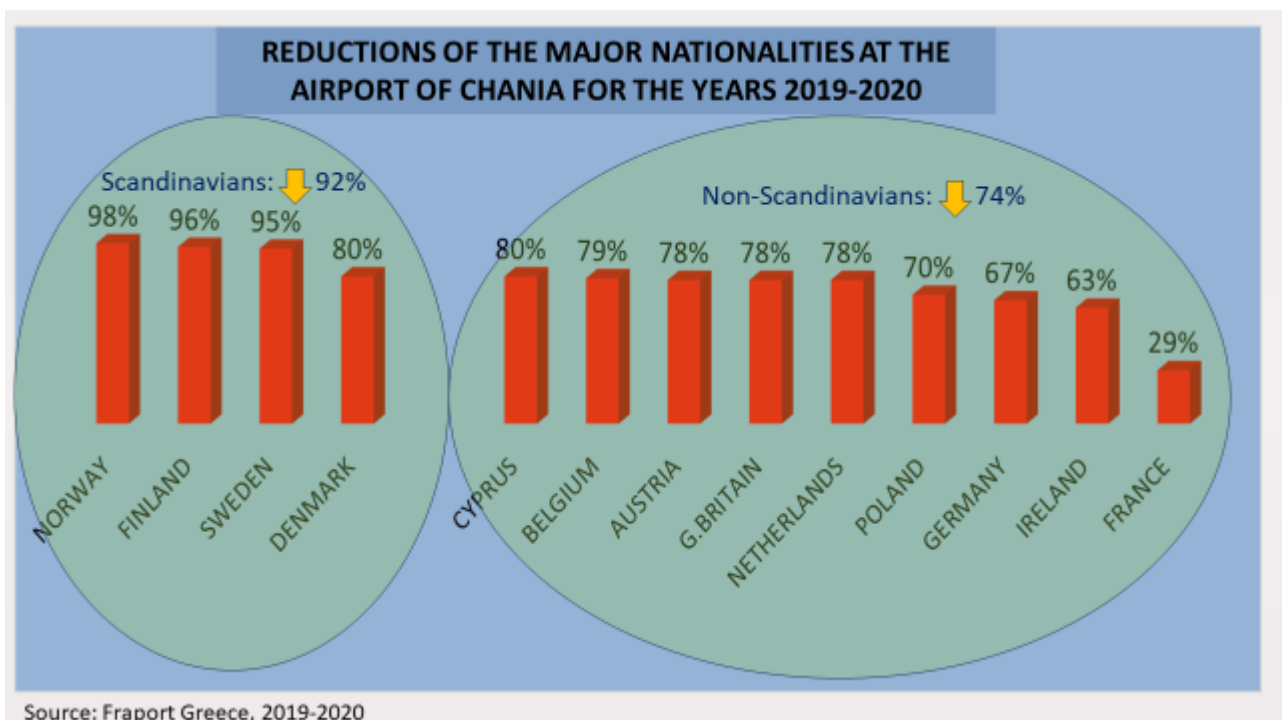
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FOREIGN TOURIST ARRIVALS

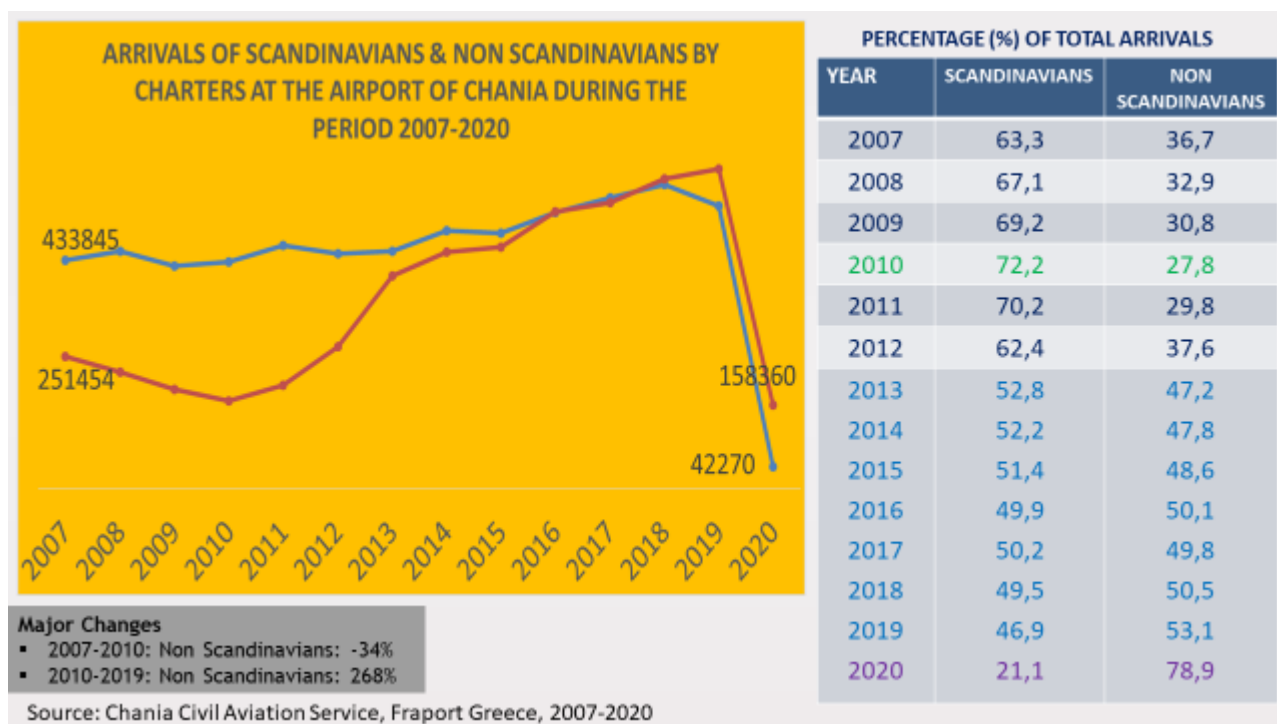
Regarding the arrivals of foreign tourists at Chania airport and based on the latest data of Fraport-Greece for the year 2020, there were only 201,000 arrivals, a record low for at least the last 25 years, recording a **vertical decrease of 82%** compared to the last year.



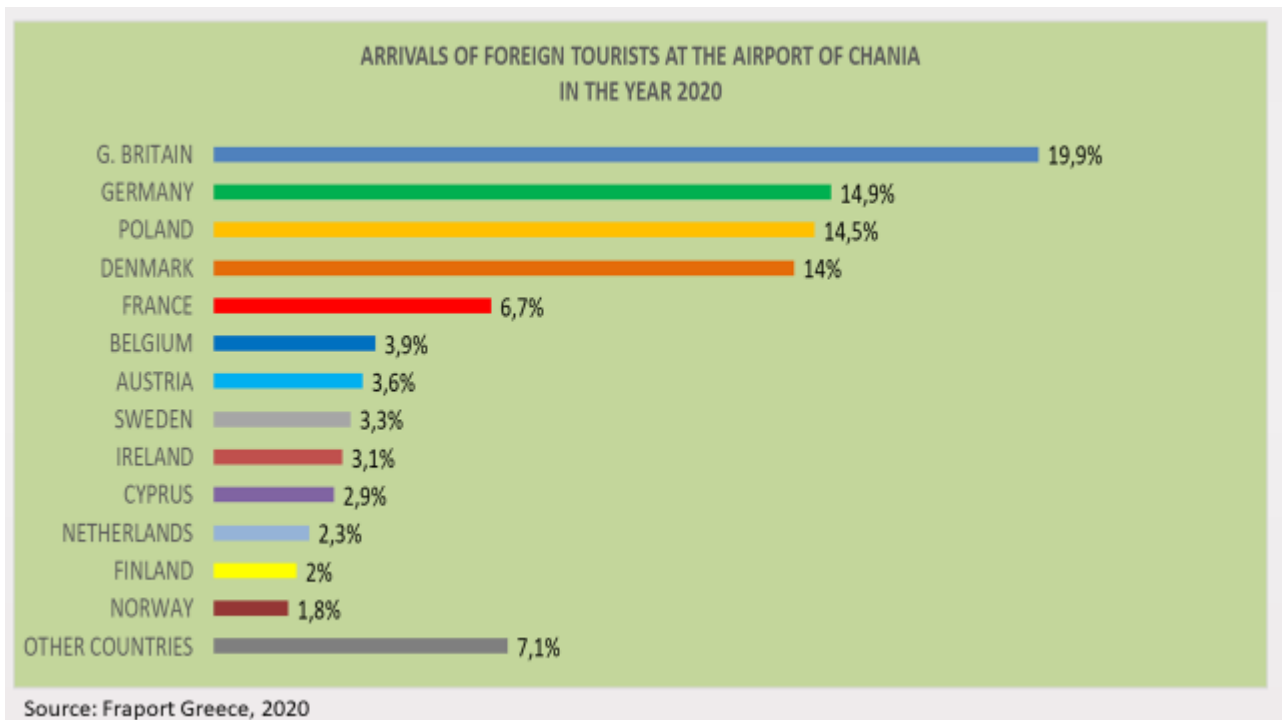
This decrease is recorded for all nationalities visiting Western Crete, with the most significant decrease presented by Scandinavians - Norwegians, Finns, Swedes and Danes - with a percentage of **92%**, while the percentage of decrease among non-Scandinavians is also high, in the order of **74%**.



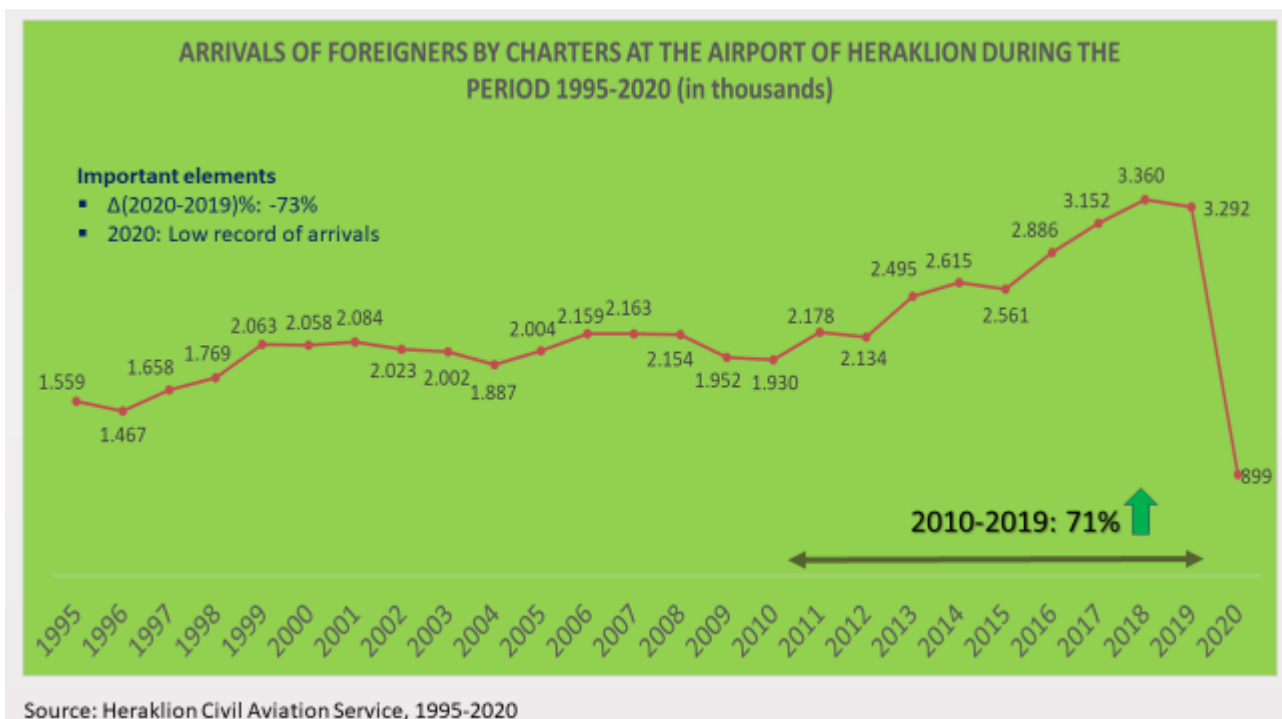
If we consider that in recent years the arrivals of foreign tourists were around 50% Scandinavians and the remaining 50% non-Scandinavians, this universal decline is mainly due to both nationality groups, even more so affected by the fewer arrivals of Scandinavians, which reached only 42,000.



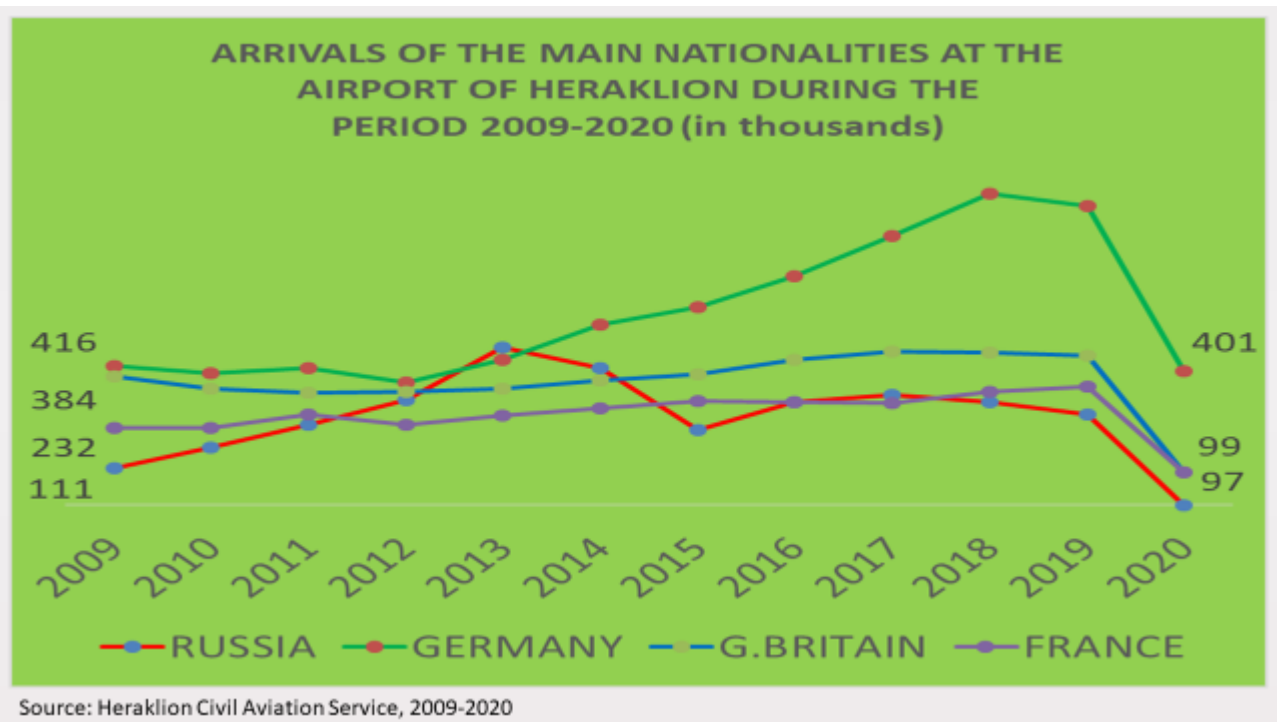
Regarding the arrival rates of foreign tourists at Chania airport for the current tourist season, it was observed that the nationality mix is changing, since only one in six foreign visitors is Scandinavian, while half the foreign tourists come from just three non-Scandinavian countries: Great Britain, Poland and Germany, with the British continuing to remain in first place compared to last year with 22%, while for the first time ever, the Poles occupy second place in the total arrivals, with 16%. The percentages of Norwegians and Swedes, who numbered just 3% each, fell behind in the last places in terms of total arrivals, whereas in the previous corresponding period, they occupied second and third place respectively, with a percentage of 13% for each nationality.



Regarding the arrivals of foreign tourists at Heraklion airport, based on the latest data of the Civil Aviation Service of Heraklion, for the year 2020, there were only 900 thousand arrivals, which is also a historic low for the last 25 years, recording an equally huge **decrease of 73%** compared to last year.



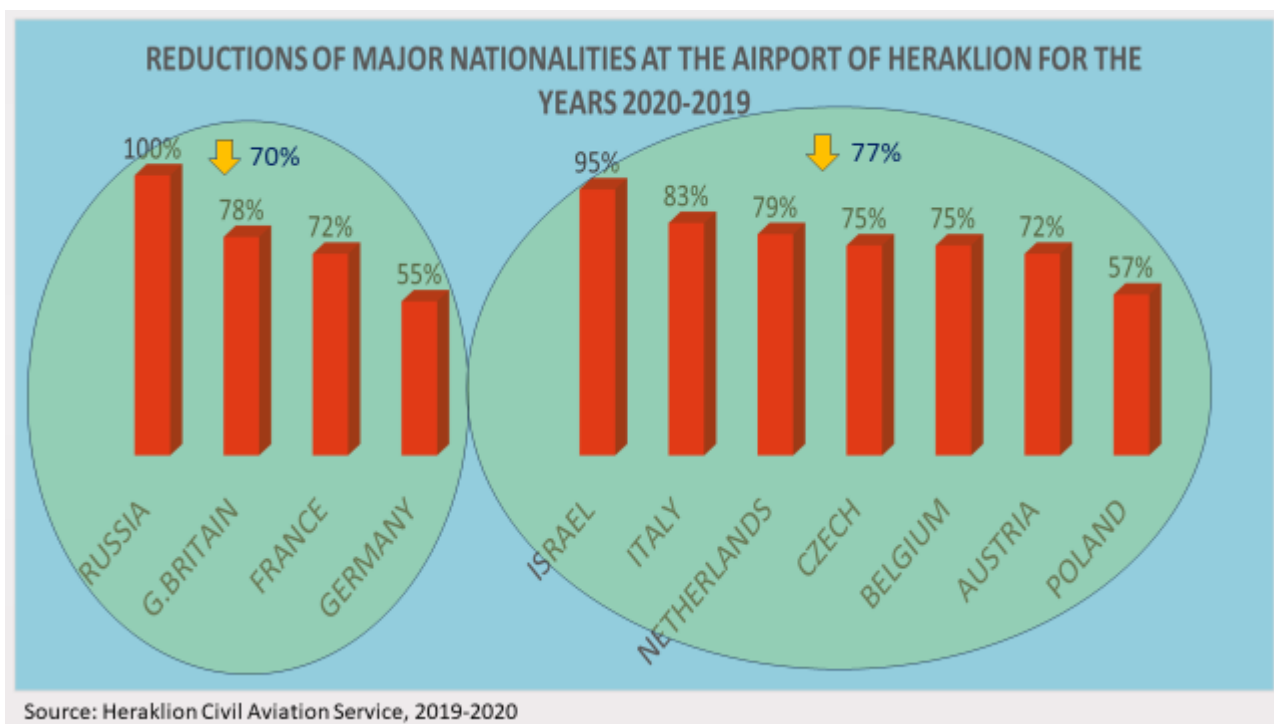
The difference is due mainly to the Germans, British, French and Russians, who continued even in this year to comprise 60% of the total arrivals, noting an equal reduction in the average percentages among all nationalities.



The difference this year, however, is that Russian arrivals were negligible, while the Germans, who recorded the smallest decrease, by 55%, increased their share of total arrivals, remaining in first place with 45%, followed by the French and British, with percentages of 11% each one.



Regarding the other nationalities, another important element is the negligible arrivals of Israeli tourists, who last year occupied sixth place among the total arrivals, a fact which is equally worrying, considering that both Israeli and Russian tourists have a high income profile. In the same way as for Chania Airport, the Poles recorded the smallest decrease with 57%, climbing for the first time in fourth place in total arrivals.



FIELDWORK

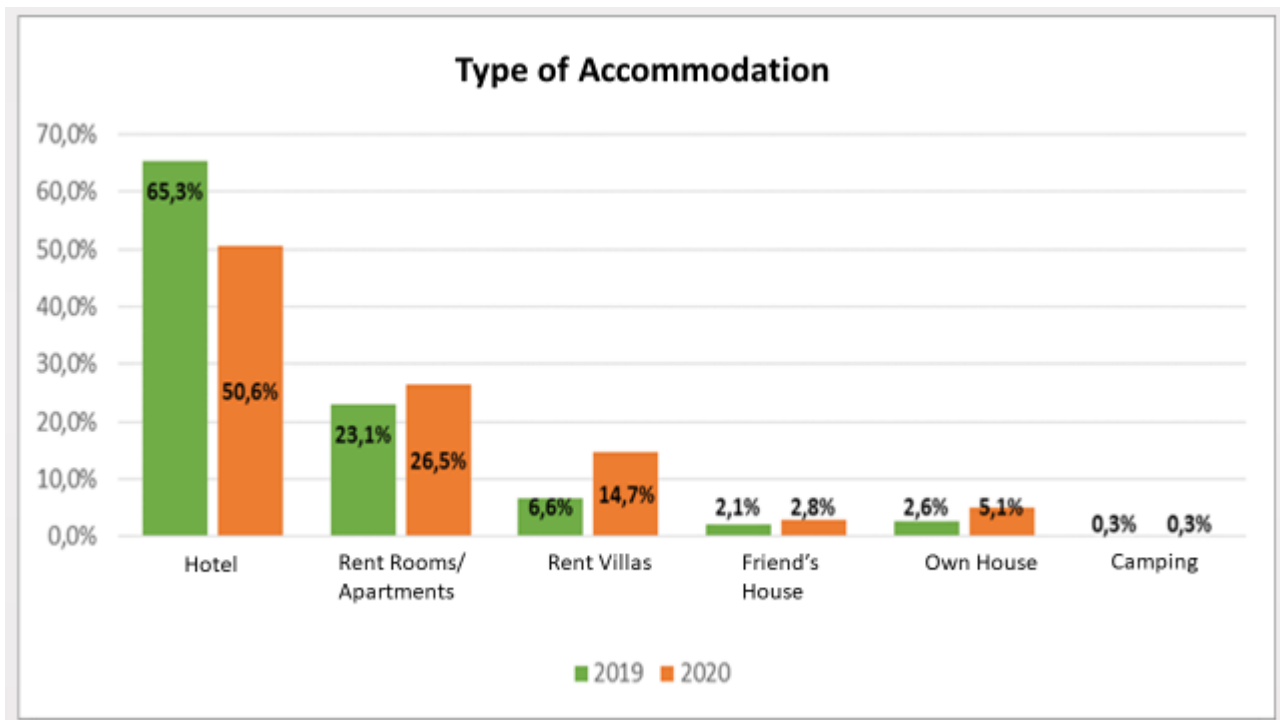
As part of the structural changes in tourism brought about by the pandemic in 2020, this year's tourism survey at Chania Airport was transformed into a COVID-19 SAFE SURVEY, where, in addition to personal interviews and questionnaires where needed, the automated system of tourists' voluntary participation fully utilized tourists' personal devices (PC, Smartphone and Tablet). The choice of this feature is notified to the visitors by the survey representative and/or roll-up posters, and is activated in the language of choice of the interested party through visual scanning of a suitable URL or QR Code from their PC, Smartphone or Tablet.

Regarding the results of the research, according to the data, the tourists who prefer Chania Airport as a final destination for their holidays show differences in their profile in relation to the previous tourist season. There is a notable increase in young age groups up to 34 years, while the age categories over 55 years show a significant decrease, which is fully justified by the fact that these vulnerable age groups chose not to take vacations this year, in order to protect themselves from the pandemic.

Moreover, compared to previous years, this year there is an increased percentage of foreign tourists visiting Western Crete for the first time, due to the limited number of Scandinavian tourists, who are traditionally those tourists who show a preference for revisiting this destination.

Differences are also found in the areas and type of accommodation where foreign tourists stay. More specifically, there is a large decrease in hotel accommodation in the areas of Agia Marina and Platanias, while there is an increase in the preferences of all other types of accommodation, such as villas, apartments, rooms

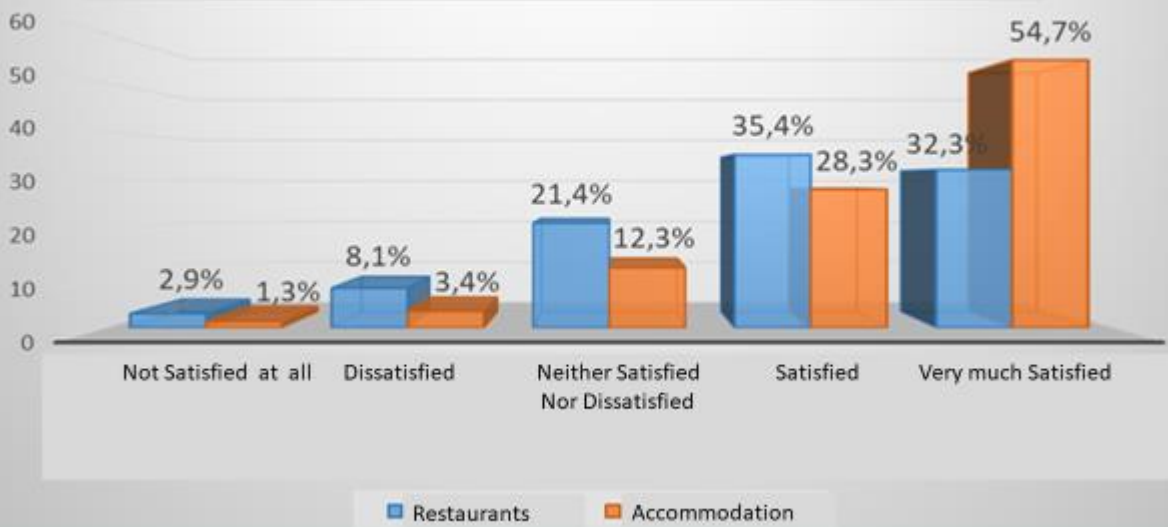
for rent, and privately owned houses mainly in Chania, as well as inland. These options also show the tendency of foreign tourists to stay in accommodations that are not crowded, while recording the same average stay, about 9 nights, compared to the previous year.



Regarding travel companions, there is an increase of tourists who chose to holiday with their partner or friends, given the arrival of more young people, while there is also a big difference in the method of booking accommodation and organizing holidays, since quite a high percentage, namely seven out of ten foreign tourists, preferred to carry out the relevant actions of the trip themselves and not through a travel agency or other agent.

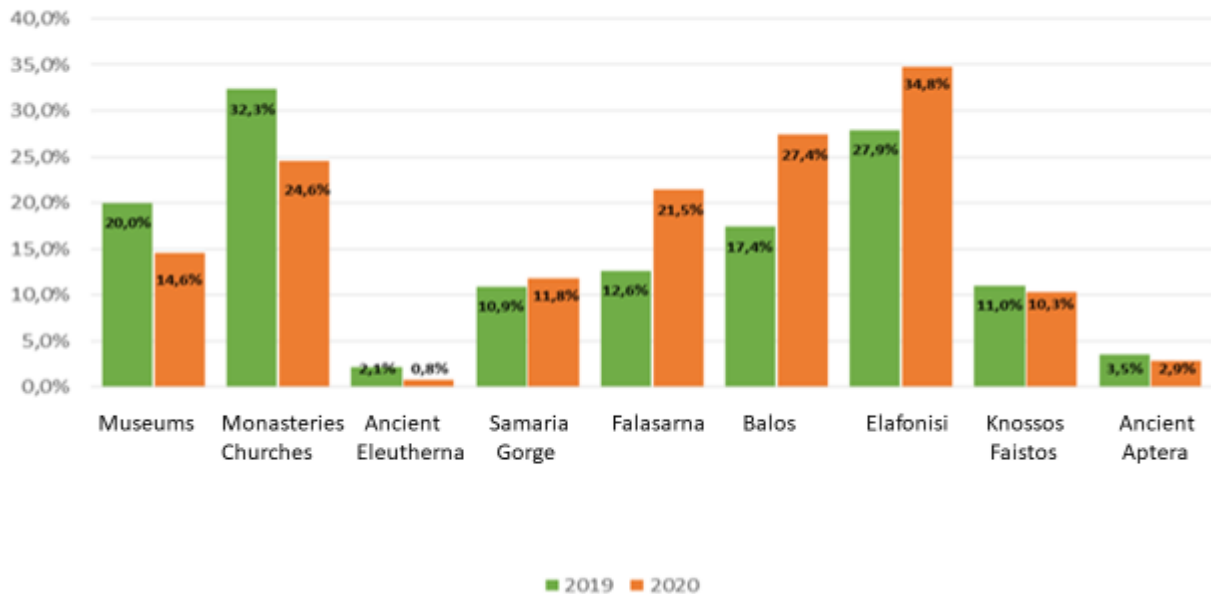
Concerning security measures in relation to the pandemic, very small percentage consider that these measures were at a low level, while on the contrary almost eight out of ten foreign tourists remain completely satisfied with the health protocols in their hotel accommodation and seven out of ten tourists remained satisfied with the corresponding protocols in restaurants and tavernas.

Satisfaction regarding the health protocols

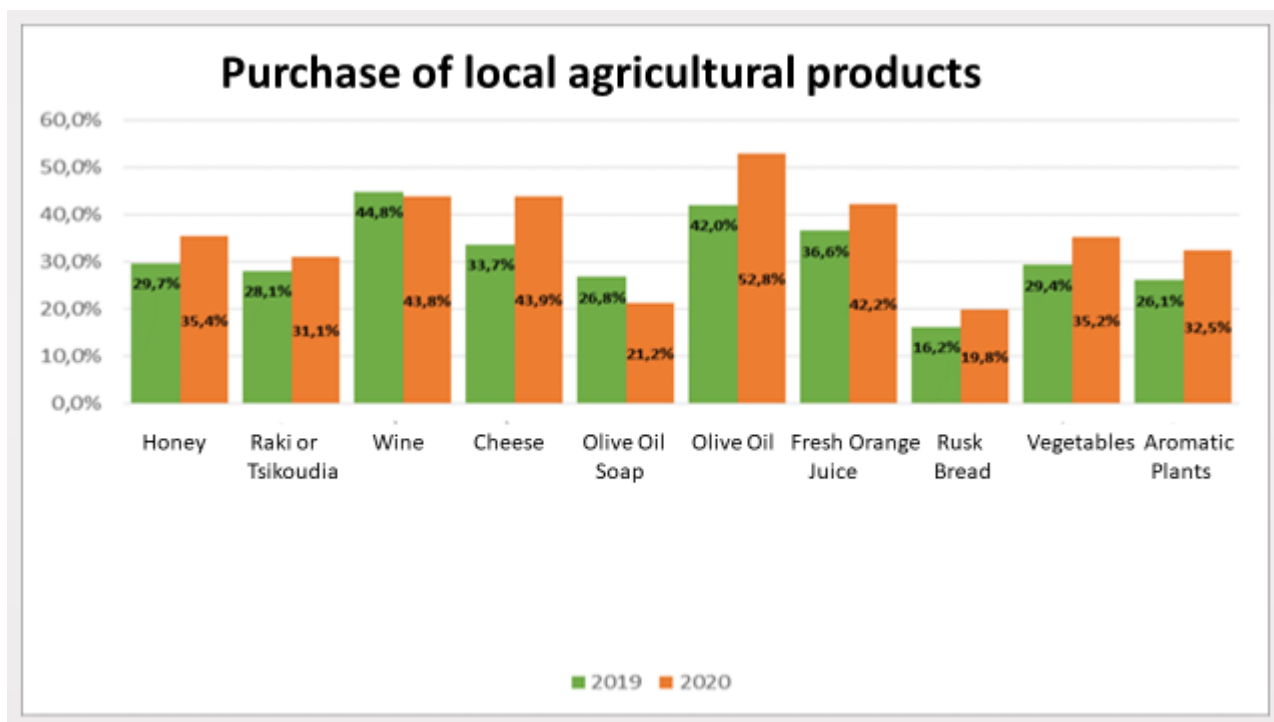


Regarding the expenses incurred by foreign tourists, it seems that they limited their travels by public transport and even with rental cars, while the destinations chosen for this year were primarily the beaches of Elafonisi, Balos and Falassarna, while visits to museums, archeological sites and churches recorded a large decrease.

Visits to Touristic Destinations



Concerning the local agricultural products, the foreign tourists were very satisfied with the local characteristics of these products, while, apart from olive oil, wine and fresh orange juice which are preferred every year by tourists, local cheeses featured in their primary choices this year.



Finally, the foreign visitors feel extremely satisfied with the behavior and hospitality of the locals, as well as with the general service levels in the restaurants and hospitality areas. Their satisfaction with the cleanliness of the beaches is increased, but they continue, albeit at lower percentages compared to the previous period, to feel insecure about the conditions of the road network and road signs; they are also disappointed by the cleanliness of the urban roads and troubled by the lack of parks and green spaces.