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## **EXPLORING THE TOURISTIC IMAGE OF GREECE**

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### **ABSTRACT**

Greece has been a popular tourist destination for many decades. Tourism is one of the biggest contributors to the country's GDP, able to compete on a worldwide scale and achieving remarkable progress through the years. According to the Bank of Greece official statistics, the number of tourists in 2012 was 14.8 million and initial predictions for 2013 show a further rise to 17 million with direct revenues exceeding 11 billion euros (that is 647 euros per capita income from every tourist on average). The general purpose of this study is to explore how foreign tourists perceive Greece as a tourist destination. Specifically this study aims to identify the various selection criteria for visiting Greece, to evaluate tourists' satisfaction during their stay in Greece and to identify the most popular Greek tourist destinations. To carry out the survey we used a convenience sample from 40 different countries around the world but primarily European. The final sample was comprised of 201 foreign tourists, who shared their opinions and experiences with us after visiting Greece and before returning home. The research was based on primary data collected through individual interviews (supported by a structured questionnaire) at the departure hall of Athens International Airport "El. Venizelos", from 15/05/2012 until 15/08/2012. The general tourist image of Greece is as "a holiday destination". Empirical findings report that the most popular destinations in Greece are those developed in recent years, followed by traditional mass tourism areas, alternative destinations with special interest and finally the urban centers (mostly Athens). Findings also revealed that tourists select Greece for many different reasons (selection criteria). The most significant criteria appear to be the climate,

the natural beauty, the culture and the warm hospitality of Greeks. Tourists experienced high satisfaction levels when visiting museums and archaeological sites and when tasting Greek food and beverages. The quality of accommodation also scored high. Finally, tourists were not satisfied by the environmental pollution, the high price of goods and services, the road signs and the quality of the roads.

**Keywords:** Greek tourism, tourist satisfaction, touristic destination, selection criteria.

## **1. INTRODUCTION**

Over the decades, tourism has experienced continued development to become one of the fastest growing economic sectors in the world. It is closely linked to economic growth and encompasses a growing number of new destinations. These dynamics have turned tourism into a key driver for socio-economic progress to those countries who invested on their touristic infrastructure. For Greece, tourism has been the most dynamically growing sector since its contribution to national economy is measured at 34.4 billion euros, representing 15.1% of the total Gross Domestic Product. In terms of employment, estimations state that 741,000 job placements are supported by tourism (IOBE, 2011). The incorporable match of different destinations and contrasts attracts every year millions of tourists from all around the globe, who visit Greece in order to experience the authentic Greek touristic offer. It is the place they can discover the Greek history and culture, the environment, the climate, the food and the aesthetic integrity of Greek islands.

The general purpose of this study is to explore how foreign tourists perceive Greece as a tourist destination. Specifically this study aims to identify the various selection criteria for visiting Greece, to evaluate tourists' satisfaction during their stay at Greece and to identify the most popular Greek touristic destinations. To achieve the purpose (and the aims) of this study we carried out a survey and collected various types of data concerning: respondents' demographic characteristics, activities and places they opt for, average per day expenditures, trip organizing factors, satisfaction level, pre-made image of the country, intention of coming back at the near future, efficiency of Greek advertising campaign abroad, alternative competitor countries to Greece etc.

## **2. INDICATIVE LITERATURE REVIEW**

Regarding tourist market data, the Greek authorities periodically carry out sample surveys of foreign visitors in order to identify the type of tourists that travel to Greece and to determine the factors which influence their preferences and their purchasing behaviors (Buckley and Papadopoulos, 1986). It must be recognized, however, that the tourist product is a composite product and that there is more than one type of client. At this direction, market segmentation is required since the subdividing of a market into distinct

subsets of customers, where any subset may conceivably be selected as a market target can be reached with a distinct marketing mix' (Kotler, 1976).

As Kaynak and Yavas (1981) suggested in their study, once purpose-orientated segments are identified they can be mapped according to demographic and psychographic characteristics thus helping policy makers to target their strategies more precisely. In this respect, the Greek tourist authorities in more recent surveys endeavored, with the help of international market research and advertising agencies (e.g. McCann-Erickson, A.C. Nielsen Hellas and Aspect) to establish a visitor profile for each major country supplying tourists to Greece.

The European market for Greek tourism is by far the most important. According to data given by Greek National Tourism Organization (GNTO) and National Statistical Service for the period 1950-1995, most visitors (93.2%) originate from Europe and 70.2% from the EU, especially United Kingdom, Germany, Sweden, Finland, Deutschland and Austria (Buhalis, 2001: Greek National Tourism Organization and National Statistical Service). Although these nationalities are the dominant markets, the British and the Germans contribute almost half of all arrivals. Examining the results of an even more recent sample survey, carried out at 2008 under the auspices of the Greek National Tourist Organization of Greece among foreign travelers visiting the country by plane, it can be observed that the demand of British and Germans was at high levels (53.8% and 15.9% respectively), while Russians (13.1%) and French (5.1%) completed the top-four markets visiting the country. As Buckley and Papadopoulos (1986) state: "Rising transport costs play an important role in determining choice for a tourist destination. Hence Europeans are more likely to travel to a nearby tourist destination instead of far off places such as the USA and Australia".

Buhalis (2001) mentions that the inconvenience of indirect transportation schedules, large differentials in charges for groups and individual customers by accommodation establishment, lack of information about the Greek tourism product, as well as insufficient marketing by SMTEs (Small and Medium Touristic Enterprises) have enabled tour operators to act as intermediates between consumers and principals and to play a dominant role in the tourism industry. However, the development of the Internet enables prospective visitors to pre-book their packages independently and to use cheaper non-frills airlines and leisure fares of schedule airlines for their transportation (Buhalis, 2001).

GNTO (2008) survey results confirm that a vast majority of foreign tourists are travelers-repeaters, since they have come once (18.4%), twice (12%), three times (11.5%), more than four times in Greece (17.8%) or they even visit the country every year (7.2%). The areas visited by these kinds of visitors are described by Gilbert (1984, 1990) as "status areas" and is a result of the unique product perceptions by the tourism market. These unique attributes may be genuine or imagined and thus, a destination is regarded as irreplaceable, increasing consumers' loyalty.

Nevertheless, despite its popularity and growth over the last 40 years, the Greek tourism industry has reached a stage where both its potential and competitiveness have become questionable (Buhalis, 2001). "Rapid increases in price mean the country is no longer perceived by mass market clients as cheap in relation to comparable destinations in the Mediterranean, but much of the country's tourism infrastructure, hastily built in response to demand for cheap accommodation, does not meet the needs of a market less sensitive to price and more concerned with quality and value for money" (Economist Intelligence Unit/EIU, 1990) As a result, Greece fails to attract the desired "high-quality, high-expenditure" tourists and is increasingly unable to satisfy their requirements (Conway, 1996). The deterioration of the tourism product and image leads to a lower willingness-to-pay by consumers, which consequently leads to a further drop in quality, as the industry attempts to attract customers with lower prices. Consequently, tourists' expenditure per capita in Greece gradually deteriorates, while their volume increases (Association of Greek Tourism Enterprises/SETE, 1993). According to SETE (2012), United Nations World Tourism Organization/UNWTO and the World Economic Forum 2012 ranks Greece at the third place regarding tourism receipts, competitiveness and arrivals. Spain and Cyprus have achieved the greatest performance while Egypt and Croatia are graded at the fourth and fifth place respectively.

### 3. METHODOLOGY AND SAMPLE

To carry out the survey we used a convenience sample from 40 different countries around the world but primarily European. The final sample was comprised of 201 foreign tourists, who shared their opinions and experiences with us after visiting Greece and before returning home. The research was based on primary data collected through individual interviews (supported by a structured questionnaire) at the departure hall of Athens International Airport "El. Venizelos", from 15/05/2012 until 15/08/2012. Descriptive statistics were calculated for all variables. Table 1 provides some basic sample data.

Table 1: Sample characteristics of Tourists

<u>Variables</u>	<u>Characteristics/v alues</u>	<u>Results</u>
<b>Sex</b>	Male	48.8%
	Female	52.2%
<b>Age groups</b>	19-30	42.2%
	31-45	22.9%

	46-65	21.4%
	13-18	9%
	66+	4.5%
	Mean	34.7 years
<b>Nationality</b>	<b>Europeans</b>	67.6%
	British	10.9%
	French	7.5%
	Italians	7.5%
	Spanish	6%
	Belgian	5%
	Germans	4%
	Other	26.7%
	<b>Non Europeans</b>	32.4%
	Australians	14.4%
	Americans	7%
	South Africans	3%
	Other	8%
<b>Professional status</b>	Employed	56.2%
	Students	32.3%
	Retired	7%
	Housewives	2.5%
	Unemployed	2%

<b>Previous visit</b>	Yes	55.7%
	No	44.3%

The sample originates from 40 different countries worldwide. Non-European citizens consist 32.4% of the sample including tourists from Australia (14.4%), USA (7%), South Africa (3%) and countries as Korea, Canada, Argentina, Brazil, China, Dominican Republic, Philippine, Mexico, New Zealand, Palestine and Yemen (the rest 8%). The majority of our sample originates from Europe (67.6%). More specific; United Kingdom (10.9%), France (7.5%), Italy (7.5%), Spain (6%), Belgium (5%), Germany (4%), Netherlands (3.5%) as well as Austria, Denmark, Iceland, Ireland, Norway (2% each), Switzerland, Russia, Rumania, Sweden, Bulgaria, Finland, Hungary, Malta, Poland (1% each), Portugal, Croatia, Estonia, Serbia and Ukraine (the rest 4.2%). The average tourist's age of our sample is approximately 35 years old; 51.2% are women and 48.8% men. The majority of our sample are employed (56.2%) and 55.7% of the total sample have previously visited Greece.

#### 4. EMPIRICAL RESULTS

Table 2 presents the touristic preferences (in terms of areas chosen and classification of destinations) and data about organizing their trip to Greece.

Table 2: Touristic Preferences and Trip Organizing

<u>Variables</u>	<u>Values</u>	<u>Results</u>
<b>Types of chosen areas</b>	Coastal/Seaside	75.6%

<b>(Multiple Response)</b>	Urban	28.4%
	Mountains	11.4%
	Rural	5%
	Lakes	2%
<b>Classification of destinations</b>	Recently-developed areas that combine summer holidays with different types of touristic development (Amorgos, Folegandros, Milos, Andros, Kefalonia, Ios etc.)	38.5%
	Mass tourism areas (Santorini, Crete, Corfu, Mikonos, Paros etc)	26.5%
	Specialized destinations (Meteora, Olimpia, Idra, Chios, Koroni, Alonissos, Sporades, Kalavrita, Methana)	12.5%
	City centers (Athens, Thessaloniki etc)	17.9%
	Other	14.6%
<b>Purpose of the trip</b>	Holidays and recreation	75.1%
	Professional Reasons	16.4%
	Other	8.5%
<b>Way of organizing their trip</b>	Independently	79.6%
	Via tour operator	20.4%

<b>Accommodation</b>	Hotel/ 2-3 stars	28.3%
	Hosted by friends or family	19.4%
	Hotel /4-5 stars	18.9%
	Furnished apartments	12.4%
	Rooms to let	7.5%
	Free camping	5%
	Organized camping	4.5%
	Hotel/1 star	4%
<b>Expenses per day (Excluding accommodation costs)</b>	Mean	79.9€
	Median	60€
	SD	59.3
<b>Information sources to organize a trip to Greece (Multiple response)</b>	Internet	83.1%
	Friends and family	43.8%
	Previous experience	22.4%
	Travel agents	20.4%
	Newspapers/magazines	6%
	Radio/TV	3%
	GNTTO Offices	1%
<b>Nature of activities</b>	Passive (sightseeing, swimming, cruises)	65.2%
	Active (participation in social and environmental friendly)	34.8%



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majority of tourists opt for seaside (75.6%) and urban (28.4%) areas and only a few prefer rural, mountain or lake locations (5%, 11.4%, 2% respectively). Destinations as Aigina, Amorgos, Andros, Chalkida,, Chalkidiki, Folegandros, Ios, Ithaki, Karditsa, Karpathos, Kavala, Kefalonia, Kithira, Kos, Leukada, Lesvos, Naxos, Patra and Samos which follow the summer holiday model even though their growth has been accomplished lately, attract the highest percentage of travelers (38.5%). Meanwhile, 26.5% of the sample prefer the traditional, classic places that have been starring for decades, like Santorini, Crete, Corfu, Rhodes, Mikonos and Paros. 12.5% of respondents travel to destinations whose development has been associated with specific religious ( Meteora), cultural (Olimpia, Idra, Chios, Koroni), ecological (Alonissos, Sporades), complex environmental sources (Kalavrita) or thermal ones (Methana). Visitors who prefer to visit city centers are 17.9%.

67.51% of the total sample visited Greece for holiday and recreation and only 16.4% of respondents came for professional reasons. The survey imprints a strong trend towards independently organized trips (82.1%), whereas tour operators seem to lose their dominant role (17.9%). Therefore, the main information source to organize a trip to Greece is the net (83.1%) and second best the friends and family (word of mouth) with 43.8%. Approximately 20% of the total sample trusts tour agencies, 23.4% had already a previous personal experience about the country and only 9% are advised by traditional means (tv, radio, newspapers, magazines). Minor is the contribution of GNTTO offices at countries of origin (only1%).

Regarding accommodation, high and medium category hotels are preferred (47.2%), as well as auxiliary and additional touristic infrastructure/facilities (rooms to rent, apartments, camping- 29.4%). Moreover our empirical findings confirm an international trend which indicates that tourists select to stay at their friends or relatives (19.4%). This phenomenon is either attributed to economical parameters (free accommodation) and/or to strong and close relationships kept with the locals. Interestingly, 35% of incoming tourists inclined towards active tourism, visiting local cultural events, cooking and tasting local food recipes, language learning, observing biodiversity while the rest 65% favored for holidays involving only sightseeing, swimming and cruises. The mean of the personal daily expenses (excluding accommodation costs) is at 79.9€ per person (Standard Deviation=59.3, Median=60€, Min=10€, Max=300€).

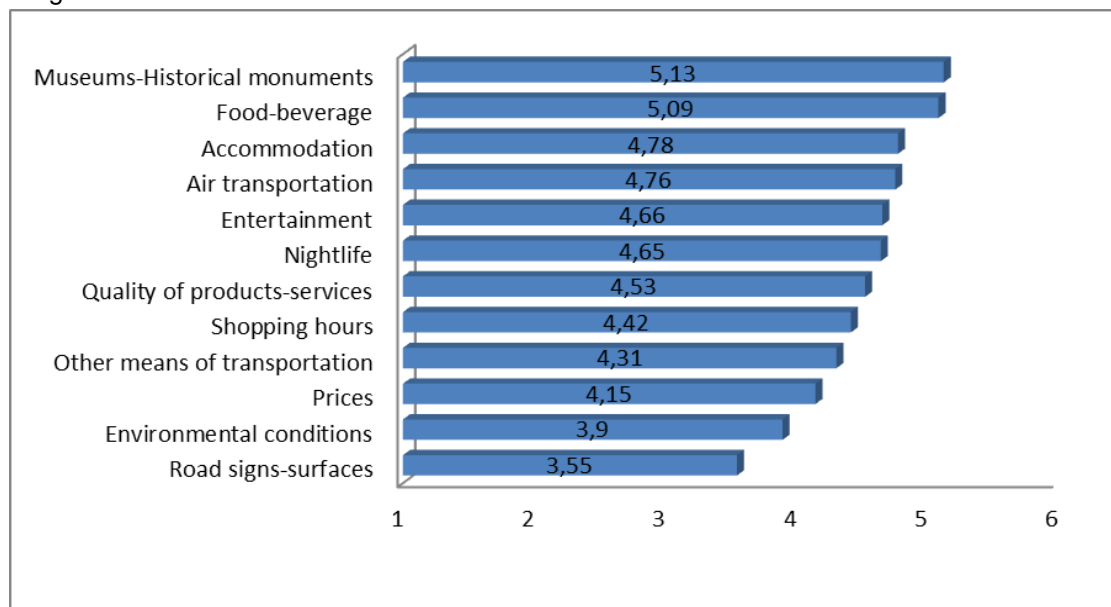
Table 3: Hierarchy of selection criteria visiting Greece

Criteria	Percentage of respondents
<b>Climate</b>	66.7%

<b>Natural beauty</b>	61.2%
<b>Culture</b>	50.2%
<b>Friendly people</b>	36.8%
<b>Good food/wine</b>	32.3%
<b>Hospitality</b>	30.3%
<b>Historical monuments</b>	27.9%
<b>Cost of living</b>	13.4%
<b>Thermal bathes</b>	3%

Table 3 presents hierarchically the selection criteria for visiting Greece. The top two selection criteria are: (a) the climate (66.7%) and (b) the natural beauty of the country (61.2%). Then follows: culture (50.2%), friendliness of the locals (36.8%), tasty food and wine (32.3%), Greek hospitality (30.3%), historical monuments (27.9%), cost of living (13.4%) and thermal bathes (3%).

Diagram 1: Evaluation of factors associated with tourist satisfaction



(scale: 1= worst evaluation, 6= best evaluation)

Diagram 1 presents the evaluation of factors which are mostly associated with tourist satisfaction during their stay at Greece. It is interesting to note that all factors were evaluated higher than the average (3.5 points). The highest satisfaction score was for museums and places with historical and cultural interest (mean: 5.13). Then we have food and beverage (mean: 5.09), accommodation (mean: 4.78), air transportation (mean: 4.76), entertainment (mean: 4.66), nightlife (mean: 4.65), quality of products and services (mean: 4.53), shopping hours (mean: 4.42), other means of transportation (mean: 4.31), prices (mean 4.15), environmental conditions (mean: 3.9) and road signs-surfaces (mean: 3.55). Another indication measuring tourists' satisfaction is their intention of coming back in the near future: 72.1% of the total sample is willing to visit Greece again, 22.9% is indecisive, while only 5% answered negatively.

Tourists, prior to their arrival, had a "Good" image for Greece (mean 4.10 at a 1-5 scale, 1: very bad, 5: very good). After their trip to Greece we asked them if their expectations were fulfilled: the mean was 4.32 (1-5 scale, 1: expectations not fulfilled at all, 5: totally fulfilled expectations).

Table 4 presents the top ten spontaneous statements of tourists before leaving Greece.

Table 4: Tourists' top ten spontaneous, authentic statements

	Nationality	Age	Statement
1	Hungarian	22	<i>Local people were very friendly. They were extremely happy if they managed to say a few words in my language. I really love autumn's temperature, beautiful beaches and the nature!</i>
2	Irish	22	<i>The sun, the beaches and the people were the best I have ever met. I think I won't find anywhere else in the world sandy beaches like these ones. I just loved it!</i>
3	Polish	31	<i>Amazing, warm hospitality from the part of the locals, peaceful and relaxing atmosphere, wide variety of things that Greece has to offer. Cultural sites, areas with a special, historical interest!</i>
4	American	23	<i>People were very kind, spoke English and made my experience worthwhile. The culture and history were amazing to experience first-hand!</i>
5	New Zealander	20	<i>I loved the attitude of locals. They always laugh and smile for a good reason!</i>
6	Spanish	69	<i>Lovely country, nice people, scenic islands, excellent civilization. Nothing compares to Greece!</i>
7	British	34	<i>Fantastic food at "tavernas"! People at the villages welcomed us in the best way! Excellent, unspoiled mountains and hills!</i>
8	Belgian	43	<i>The beautiful, pure, blue color of the sea. Ideal for swimming!</i>
9	South African	33	<i>Greece was far better than people in my country thought it would be. And even though all these things have happened in the economy, everybody seemed still happy. Strong characters!</i>
10	Dutch	49	<i>I feel like I am Greek too. "Kalimera" (Good morning)!</i>

Table 5: Greek Image

<b>'I characterize Greece as...'</b>	<b>Mean</b>
a Mediterranean holiday destination	4.36
a country-coast	4.28
a country where somebody must travel	4.12
a country of civilization	3.95
a country of qualitative natural environment	3.84
a country for independent tourism	3.81
a country for specialized and alternative tourism	3.32

*(scale: 1= strongly disagree 5= strongly agree)*

As Table 5 demonstrates, Greece is principally a Mediterranean holiday destination (mean 4.36) characterized as a "Country-Coast" (mean 4.28), a country where somebody must travel (4.12), a country of civilization (3.95) with qualitative natural environment (3.84). Official Greek advertising touristic campaign abroad was evaluated as average (mean value: 3, 1-5 scale: 1= very bad, 5= very good).

Table 6: the position of Greece against the top competitor countries in Tourism

<b>Position</b>	<b>Competitor countries</b>	<b>Percentage of respondents</b>
1	Italy	23.4%
2	Turkey	14.4%
3	Spain	13.9%
4	Croatia	13.4%
5	Greece	11.9%

6	Portugal	2.5%
7	France	2.0%
8	Cyprus	1.5%
9	Other	17%

With regard to the countries that tourists would alternatively select if they were looking for a similar type of holidays (Table 6), 65.1% of respondents answered that it would be a Mediterranean destination; neighboring Italy is listed at the first place (23.4%), new-comer Turkey at the second (14.4%) , "traditional" Spain at the third (13.9%) and alternative Croatia at the fourth one (13.4%). Greece is at the 5th position. Then come Portugal (2.5%), France (2%), Cyprus (1.5%), Egypt, Brazil and others with insignificant, however, percentages.

## 5. DISCUSSION AND POLICY PROPOSALS

It is common knowledge that tourism is one of the crucial fields in the country's national strategy and economic growth. Its ability to respond, however, to current challenges is going to determine its critical role at the areas we previously analyzed. Having completed its life-cycle, mass tourism is no longer an "up-market" product. Demand diversification should aim to swift the mass tourism product of low cost, low value-added, low-skilled employees with unprofessional services, to the offering of a differentiated product of high quality, high value-added, employing appropriately trained staff which provides high quality services (Maroudas et al, 2013); this new touristic offer should promote Greek culture and civilization and comply with high environmental standards. Indicatively, we mention three different types of specialized tourism which can be exploited:

*i) Cultural tourism.* Even though national cultural heritage represents one of the major criteria for guests, there is a need to form a multi-dimensional image of Greek culture and tradition other than just antiquities and historical monuments. These efforts are to focus on the protection and preservation of cultural heritage, revealing elements of local tradition (e.g. traditional cuisine, traditional dances etc.) even exploiting the plethora of orthodox churches (religious tourism).

*ii) Agro-tourism.* The development of agro-tourism would be able to stimulate rural areas, which were selected only by a low percentage of the total survey sample, through the construction of proper accommodation facilities or even tourists' encouragement to observe/participate at the production process of Greek popular and traditional products (such as wine, ouzo and olive oil).

*iii) Medical tourism.* Although Greece possesses a great number of advantages with regard to medical tourism, such as international airports and seaports, many private medical clinics, a great number of qualified doctors in every specialty and plethora of historical and touristic attractions, it has an insignificant market share (Theofanides and Papanikolaou, 2012). The above statement is verified by the survey results of this study, which indicated that thermal bathes are a negligible criterion for tourists visiting Greece. As medical tourism has gained a significant market share during the last decade, opportunities may emerge by offering complete and diversified packages to patients in order to convince them to select Greece for medical care.

Furthermore, new specialized forms of tourism could be promoted in order to increase Greek touristic market share such as: (a) Philosophical Tourism, (b) Mythological Tourism, (c) Homeric Tourism and d) Tourism for the origins of European Civilization deriving from ancient Greek locations (Minoan civilization in Crete, Mycenaean civilization in Peloponnese, Aegean civilization etc.).

The negative assessment regarding environmental conditions illustrates the importance of diminishing the carbon footprint for businesses involved in the touristic sector. All types of accommodation facilities should meet the criteria of "green" management and certification. For example logical use of natural resources, environmental friendly treatment of waste, water and energy saving etc.

Our research revealed that tourists experienced high satisfaction levels when visiting museums and archaeological sites and when tasting Greek food and beverages. The quality of accommodation also scored high. On the other hand tourists were not satisfied by the high prices of goods and services, the road signs and the quality of the roads. High prices of goods and services in Greece combined with the low cost emerging touristic destinations of Turkey and Croatia impose a major strategic threat for Greek tourism. It is of extreme necessity for Greece to justify high prices by offering high value to tourists (value for money). Furthermore, it is advisable to enhance transportation infrastructure (roads, ports, public means of transportation and road signs) so that tourists can easily transport within Greece (improving transport infrastructure will not benefit only the touristic sector but the whole national economy).

Moreover, extended use of internet from tourists in order to organize independently (without using a travel agent) their vacations requires the training of touristic businesses to e-tourism applications. Professionals of the touristic sector must view the adoption of new technologies as a significant tool for promoting their businesses.

Widely classified as a "country-coast" and "a typical Mediterranean country", Greece has deteriorated its position as a winter destination. Regarding this aspect, a supportive plan should aim at a twelve-month promotion of Greek touristic services, using creative advertising and targeting on groups with special interests. Furthermore, accommodation infrastructure must be adjusted and developed in that way, to host guests who prefer

winter destinations. Finally, the alarming outcome of our research concerning "average" effectiveness of the advertisement campaign of Greece abroad and minimum exerted influence of GNTTO offices in the countries of origin, require immediate action: creation and usage of one attractive and stable advertising message (slogan) that reflects the general image of Greece to foreigners and hiring high quality professionals at GNTTO offices abroad with the intention to be effective sellers-promoters of Greek touristic product.

## 6. CONCLUSIONS

Tourism is one of the most important sectors of the Greek economy. In recent years it is growing dynamically achieving a worldwide position. In the last year (2013) the number of tourists approaches 17 million and Greece position is on of the top in Mediterranean. Our research is mainly centered on how foreign tourists perceive Greece. We used a convenience sample from 40 different countries of the world, primarily from Europe based on a structured questionnaire addressed to 201 foreign tourists who shared their opinions and experiences with us after visiting Greece and before returning to their home. The data were collected at the departure hall of Athens International Airport "El. Venizelos", during the typical tourist period from: 15/05/2012 until 15/08/2012.

Results show that the majority of tourists opt for seaside (75.6%) and urban (28.4%) areas and only a few prefer rural, mountain or lake locations. The most significant criteria for choosing Greece are: the climate, the natural beauty, the cultural heritage and the warm hospitality of the Greeks. Tourists experience high satisfaction when visiting museums and archaeological sites and when tasting Greek food. The quality of accommodation scored high, but tourists were not satisfied by the environmental pollution, the high price of goods and services and the transportation conditions.

The study presents concrete policy proposals in the fields of Cultural Tourism, Agrotourism, Medical Tourism and suggests other forms of specialized tourism such as Philosophical Tourism, Mythological Tourism, Homeric Tourism etc., in order to improve the status and the image of Greece as a popular tourist destination all over the world.

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