The impact of digital marketing on destination development. A case study of Halkidiki, Greece
ABSTRACT

This thesis conducts a thorough examination of the dynamic terrain of tourism destination marketing, with a specific focus on Halkidiki, Greece. It underscores the fundamental role of destinations as critical units of analysis, recognizing their elevation to prominent brands within the travel industry. A significant aspect in this context is the emergence of Destination Marketing Organizations (DMOs) as indispensable mechanisms for enhancing competitiveness and attracting visitors.

In the era of digital transformation, the international tourism sector has experienced substantial shifts, and destination development is no exception. Traditional advertising is deemed inadequate in the contemporary digital age, where tourists increasingly seek personalized, interactive, and imaginative communication. Digital marketing, particularly through social media and influencer engagement, has become instrumental in shaping destination images. The 'VisitGreece' digital framework, implemented by the Greek National Tourism Organization, exemplifies strategic utilization across various platforms such as Facebook, Instagram, YouTube, Twitter, TikTok, and Pinterest.

Expanding its examination to Halkidiki, the thesis identifies untapped potential in this destination despite its abundant natural and cultural assets. While 'Sun & Beach' tourism flourishes, ongoing efforts aim to diversify offerings through the development of 'Yachting,' 'Cultural & Religious,' and 'Gastronomy.' Challenges such as tourism seasonality, infrastructure issues, and limited public transportation impact the overall tourist experience.

An analysis of Halkidiki's digital footprint reveals opportunities for improvement, particularly in terms of popularity, especially in key markets like Germany and the UK. The study advocates leveraging user-generated content, advanced data analytics, and the formulation of long-term digital marketing strategies to address these challenges and unlock the destination's latent potential.

However, the study faces limitations stemming from the scarcity of academic research on Halkidiki, impeding the establishment of robust foundations. Additionally, a lack of detailed statistical data hampers comprehensive comparisons and correlations between digital promotion efforts and user engagement or tourism volumes.
To propel future research in this domain, the study recommends in-depth analyses of user-generated content, advanced data analytics, and the development of bespoke long-term digital marketing strategies tailored to the unique context of Halkidiki. These initiatives aim to deepen insights into the destination's digital landscape, enhance promotional efforts, and foster sustained growth and competitiveness.

**Keywords:** Destination, DMO, digital marketing, Halkidiki
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1. INTRODUCTION

In the current era, the planning and coordination of travel experiences have predominantly shifted towards online platforms. Travelers increasingly rely on digital means to organize their journeys, where they actively seek feedback, opinions, and engage in discussions with fellow consumers, facilitating the exchange of thoughts and insights regarding their chosen destinations.

As the global marketplace continues to evolve, becoming more interconnected through a myriad of digital channels, the role of digital marketing has emerged as a pivotal force in shaping the attractiveness and competitiveness of destinations. This paradigm shift has not only revolutionized the landscape of tourism promotion and marketing but has also presented unprecedented opportunities for destinations, such as Greece, to effectively showcase the rich tapestry of their diverse touristic products to a global audience.

Within this dynamic context, this thesis seeks to delve into the intricate relationship between digital marketing strategies and destination development, with a specific focus on Halkidiki, Greece.

1.1 Aim and objectives

Tourism, recognized as a pivotal economic sector, plays a crucial role in fostering economic growth, cultural exchange, and sustainable development. In the contemporary landscape, the effectiveness of destination marketing is intricately tied to the strategic utilization of digital platforms. Understanding the impact of digital marketing on destination development is imperative for policymakers, tourism boards, and industry stakeholders seeking to enhance the allure of their locales in a dynamic and competitive environment.

The overarching aim of this thesis is to critically examine and analyze the impact of digital marketing on the development of destinations, utilizing Halkidiki, Greece, as a case study. The specific objectives include:
1. To perform a literature review of recent bibliography in the area of digital destination marketing and promotion.

2. To assess the current state of digital marketing strategies employed in destination promotion.

3. To evaluate the digital presence of Greek Destination Management Organizations.

4. To examine the role of digital DMO platforms in shaping tourists' perceptions and choices regarding Halkidiki as a destination.

5. To provide insights and recommendations for optimizing digital marketing practices for destination development.

1.2 Structure of the study

The rest of this dissertation unfolds as follows:

- The next chapter details the theoretic conceptual perimeter of digital marketing, destination management and DMOs and the value of digital destination marketing.

- Chapter 3 is dedicated to the literature review of recent relevant international bibliography and scientific articles, with special focus on digital destination marketing, the use of social media and destination branding.

- In chapter 4, an analysis of the tourism sector in Greece is performed regarding the characteristics of the tourism product and the promotion and digital marketing efforts in country level.

- Chapter 5 is focused on Halkidiki as a tourism destination, presenting the characteristics of the destination and the types of tourism attracted. Moreover a 3-fold analysis of the destination is performed, including SWOT, Lifecycle and Dickman’s 5 As.
• In chapter 6, an analysis of the digital presence and impact of Halkidiki as a destination is performed,

• Finally, in the 7th chapter, the conclusions of the study are listed, the concerns and limitations faced by the scientific community are referred to and suggestions are made for possible future research areas.
2. THE CONCEPTUAL FRAMEWORK

2.1 The concept of digital marketing

Digital marketing encompasses marketing efforts using electronic devices or the internet. It leverages various online channels to engage customers and boost sales. Friedman and Friedman (2011) highlight five characteristics of digital marketing: communication, collaboration, community, creativity, and convergence. Key components include website marketing, SEO, content marketing, social media, mobile marketing, email marketing, PPC advertising, affiliate marketing, influencer marketing, and display advertising.

Website marketing serves as a central platform for information. SEO optimizes visibility in search results, driving organic traffic. Content marketing involves sharing valuable content to engage audiences. Social media platforms connect with and advertise to specific demographics. Mobile marketing targets users on mobile devices. Email marketing nurtures leads and maintains customer relationships. PPC advertising allows for cost-effective traffic generation. Affiliate marketing involves partnerships for promoting products or services. Influencer marketing collaborates with influential figures for promotion. Display advertising includes visual ads on various platforms. These components collectively form the arsenal of digital marketing strategies, aiming to connect with audiences and drive brand engagement and sales.

Concerning the assessment of digital channel performance, Vaughan (2012) categorizes the most significant ones as search engine marketing (comprising both SEO and paid search), email marketing, and social media marketing channels (refer to Table 2.1).

Digital marketing has transformed the conventional marketing mindset and how consumers are perceived, acknowledging them as active "co-creators" (Baser, 2020). This shift has given rise to new concepts like "crowdsourcing." Furthermore, digital marketing places a strong emphasis on harnessing valuable "customer-generated data" and insights. Marketers use analytics tools to track website traffic, user behavior, and campaign performance. This data helps optimize marketing strategies and make data-driven decisions.
Currently, digital marketing is constantly evolving, driven by changes in technology, consumer behavior, and the digital landscape. It offers businesses a diverse set of tools and strategies to reach their target audience, build brand awareness, and drive sales in

### Table 2.1: Performance measures for digital marketing instruments

<table>
<thead>
<tr>
<th>Channel</th>
<th>Measure</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEO</td>
<td>Keyword Performance</td>
<td>Check ranking in the search engine for each keyword.</td>
</tr>
<tr>
<td></td>
<td>Total traffic from organic search</td>
<td>The percentage of unique visitors who arrive at our site from a link on a search engine results page.</td>
</tr>
<tr>
<td></td>
<td>Inbound links</td>
<td>A measure of the number of links back to our site from other sites on the web.</td>
</tr>
<tr>
<td></td>
<td>Conversion rates from organic search</td>
<td>The percentage of visitors who arrived at our site through organic search and completed a desired conversion action, such as becoming a lead or purchasing a product.</td>
</tr>
<tr>
<td>Paid search</td>
<td>CTR (Click-Through Rate)</td>
<td>The percentage of the audience that viewed our ad and actually clicked on the link provided, calculated by dividing total clicks by the number of impressions</td>
</tr>
<tr>
<td></td>
<td>CPC (Cost Per Click)</td>
<td>The amount we are paying for each click on a specific search ad.</td>
</tr>
<tr>
<td></td>
<td>Conversion rate</td>
<td>The percentage of visitors who completed a desired action (e.g., product purchase or lead generation form completion) after clicking on one of our PPC ads.</td>
</tr>
<tr>
<td></td>
<td>CPA (Cost Per Acquisition)</td>
<td>A measurement of how much we are spending on PPC advertising for each conversion.</td>
</tr>
<tr>
<td>Email marketing</td>
<td>Bounce rate</td>
<td>The percentage of total emails sent that could not be delivered to the recipient’s inbox, known as a “bounce”.</td>
</tr>
<tr>
<td></td>
<td>Delivery rate</td>
<td>The percentage of emails that were actually delivered to recipients’ inboxes, calculated by subtracting hard and soft bounces from the gross number of emails sent, then dividing that number by gross emails sent.</td>
</tr>
<tr>
<td></td>
<td>CTR (Click-Through Rate)</td>
<td>The proportion of the audience who clicked on one more links contained in an email message.</td>
</tr>
<tr>
<td></td>
<td>Conversion rate</td>
<td>The percentage of recipients who clicked on a link within an email and completed a desired action.</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>Audience and reach</td>
<td>The total number of people engaging with our brand in social media channels, such as Facebook “Likes”, Twitter followers, LinkedIn Group members, blog subscribers, YouTube channel subscribers, etc.</td>
</tr>
<tr>
<td></td>
<td>Engagement</td>
<td>The number of interactions generated in social media channels, as measured by metrics such as: Facebook “Likes” (AKA fans), Retweets and replies on Twitter, Blog comments, Facebook Page comments, YouTube video views.</td>
</tr>
<tr>
<td></td>
<td>Traffic</td>
<td>The percentage of unique visitors to our website that comes from social media.</td>
</tr>
<tr>
<td></td>
<td>Conversion rate</td>
<td>The percentage of visitors from social media that convert into lead or customers.</td>
</tr>
</tbody>
</table>

*Source: Vaughan (2012)*
the digital age. Effective digital marketing requires a deep understanding of the target audience and a willingness to adapt to emerging trends and technologies.

2.2 Tourism Destination and DMOs

According to UNWTO Glossary of Tourism Terms (2023) “A tourism destination is a physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. A destination incorporates various stakeholders and can network to form larger destinations. It is also intangible with its image and identity which may influence its market competitiveness.”

Destinations are practically a mixture of tourist products, services and natural and/or artificial attractions, which offers an integrated experience for consumers (Buhais, 2000).

Tourism destinations can be categorized based on:

a. **Spatiality**: national, regional, local, urban, rural.

b. the **Touristic Product** offered: mass tourism destination, alternative tourism destination (cultural, culinary, adventure, wellness, ecotourism)

c. their **development stage**: undeveloped, emerging, developing/lesser known, developed/mature, declining/rejuvenation.

It's important to note that some destinations may fall into multiple categories depending on how they are assessed. Additionally, the development stage of a destination can change over time as tourism evolves and expands.
Tourism destination management is a comprehensive approach to planning, developing, marketing, and managing a tourist destination to maximize its economic, social, and environmental benefits while minimizing negative impacts. Effective destination management involves a range of stakeholders, including government agencies, local communities, tourism businesses, and organizations, working together to create a sustainable and attractive destination. Therefore, it assumes “the cooperation of many organizations and interests working towards a common goal” (UNWTO, 2007). Coordination of these efforts is done by Destination Management Organizations (DMOs) that may be:

- National Tourism Authorities (NTAs) or Organizations (NTOs), responsible for management and marketing of tourism at a national level.
- Regional, provincial or peripheral DMOs (RTOs), responsible for the management and/or marketing of tourism in a geographic region
- Local DMOs, responsible for the management and/or marketing of tourism based on a smaller geographic area or city/town

In the past, there were entities exclusively dedicated to endorsing and marketing locations, which later evolved into entities referred to as destination marketing

Figure 2.1: Tourism destination lifecycle

Source: Morisson (2013)
organizations (DMOs). These organizations have since taken on additional duties and roles, leading to their current designation as destination management organizations (DMOs). While the difference in nomenclature may seem minor, it signifies a significant transformation in the functions of DMOs. The most recent prevailing viewpoint, often endorsed by economically advanced countries among the top 10 global tourist destinations, leans toward emphasizing the more comprehensive functional perspective of the Destination Management Organization (DMO). This contemporary perspective posits that a DMO's role extends beyond mere marketing; it should encompass a broader scope of responsibilities, including tourism development in its widest sense. This entails involvement in product enhancement, community development, experience enrichment, promotional efforts, sales and marketing, as well as territorial development and the presentation and overall appearance of the destination as perceived by tourists themselves (Teodorov et al., 2020)

Successful tourism destination management requires a holistic and collaborative approach that balances economic growth with environmental and social responsibility. Sustainable management practices help ensure the long-term viability and attractiveness of the destination for both visitors and residents.

However, the term "management" inherently suggests a level of control, and as Pike and Page (2014) emphasize, only a limited number of Destination Management Organizations (DMOs) possess both the authority and the resources necessary to efficiently oversee their destinations. This is despite the fact that stakeholders within the broader tourism sector may either implicitly assume or emphasize this responsibility when addressing issues or seeking guidance in destination leadership.

2.3 The value of digital destination marketing

Digital destination marketing involves promoting specific locations using digital channels and marketing tools. It's complex due to varied components, limited control, and diverse stakeholders shaping the destination's brand and experience. The rise of Web 2.0 and E-tourism revolutionized travel booking, with a growing number using mobile phones for arrangements.
Destination agencies adopt digital marketing for its extensive advantages:

i) Global Reach: Using digital platforms, agencies target a global audience, boosting tourism revenue as seen in Amsterdam's "I Amsterdam" campaign.

ii) Cost-Effectiveness: Digital campaigns offer higher ROI compared to traditional methods, showcased by Tourism Queensland's low-cost promotion of the Great Barrier Reef.

iii) Personalization & Engagement: Tailoring messaging enhances engagement, exemplified by VisitScotland's customized content promoting Scotland's varied culture and landscapes.

iv) Real-time Interaction: Social media and chatbots provide immediate interaction, improving visitor experience, such as the New York Botanical Garden's Facebook Messenger chatbots.

v) Content Marketing: Quality content like videos entices visitors, seen in Norway's "Northern Lights Minute" campaign.

vi) User-Generated Content: Encouraging sharing generates powerful promotion, as seen in Visit California's "Dream365" campaign.

vii) Data Insights: Digital marketing provides valuable visitor behavior data, informing future strategies and enhancing experience.

viii) Accessibility: Digital platforms ensure inclusivity for people with disabilities and aid trip planning.

ix) Sustainability: Encouraging sustainable practices through digital channels minimizes negative impacts, like Costa Rica's "Only the Essentials" campaign.

x) Competitive Advantage & Branding: Effective digital strategies establish a destination's brand identity and create a distinctive image.

xi) Crisis Management: Digital platforms facilitate crisis communication, ensuring visitor trust and safety.
Overall, digital destination marketing is crucial for attracting tourists, driving economic growth, and enhancing visitor experiences by leveraging digital capabilities to showcase unique offerings effectively. Successful global examples highlight its positive impact on tourism.
3. DIGITAL MARKETING AND DESTINATION DEVELOPMENT: LITERATURE REVIEW

Research articles in the field of destination marketing signify a notable and expanding area of growth within the tourism industry. This field has developed into a distinct paradigm with considerable significance, underpinned by four key propositions associated with global tourism (Pike & Page, 2014):

i. Primarily, it's crucial to acknowledge that the majority of tourism activities occur within destinations themselves.

ii. The United Nations World Tourism Organization (UNWTO) has put forth the proposition that destinations constitute the "fundamental unit of analysis in tourism" (WTO, 2002).

iii. Destinations have emerged as some of the most prominent brands within the travel industry.

iv. Many countries, states, and cities are now allocating resources to establish Destination Marketing Organizations (DMOs) as the primary mechanism for competitiveness and the attraction of visitors to their unique locales or visitor spaces.

N.K. Malhotra (1996) contended that destination marketing research primarily revolves around the practical application of theories and methods aimed at identifying and aiding in the resolution of marketing management decision-related issues. Consequently, the field of destination marketing has been defined by a decentralized approach focusing on applied research rather than the development of theoretical frameworks. Indeed, there has been a scarcity of conceptual innovations as well as a dearth of studies designed to replicate and reevaluate the findings within the realm of destination marketing research (Pike & Page, 2014).
3.1 DMOs and digital destination marketing

In 2014, Pike and Page published a literature review of 40 years research in the area of Destination Marketing Organizations and destination marketing. The authors present in a figurematic format the role and overall aim of a DMO (Figure 3.1).

At the apex of the hierarchy lies the ultimate objective pursued by all Destination Marketing Organizations (DMOs), which is the enduring competitiveness of the destination. Achieving this ambition hinges on the presence of two fundamental components. Firstly, there is the necessity for resources that serve as potential wellsprings of comparative advantage. Secondly, effective destination management is indispensable. In both instances, the critical factor is the establishment of an efficient and capable organizational structure.

**Figure 3.1: Overall aim of a DMO**

<table>
<thead>
<tr>
<th>Sustained Destination Competitiveness</th>
<th>Effective Destination Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources Representing Sources of Comparative Advantage</td>
<td>Effective Organisational (e.g. DMO)</td>
</tr>
<tr>
<td>Resource audit:</td>
<td>- Attractive environment</td>
</tr>
<tr>
<td>- Valuable</td>
<td>- Profitable industry</td>
</tr>
<tr>
<td>- Relative uniqueness</td>
<td>- Positive visitor experiences</td>
</tr>
<tr>
<td>- Unimitability</td>
<td>- Ongoing investments in new product development</td>
</tr>
</tbody>
</table>

**INTERNAL** – Efficient use of internal resources and appropriateness of DMO activities

**EXTERNAL** – Effectiveness of activities to achieve a leadership market position

In terms of the effectiveness of destination marketing organizations, it can be appraised from two vantage points: an internal perspective, which involves the judicious and efficient utilization of resources, and an external perspective, which gauges
effectiveness in the marketplace. To assume a leadership position in this context entails the development of a distinct brand identity and the orchestration of marketing communications to position the brand. Achieving success in this endeavor hinges on the meticulous measurement and monitoring of performance.

Furthermore, Gretzel (2015) presents an overview of the Principles and Challenges of Digital Marketing for Destination Marketing Organizations (DMOs), taking into account the ongoing technological advancements. Firstly, she addresses the DMO website, suggesting that DMOs should embrace a "platform-thinking" approach akin to successful brands like TripAdvisor and Airbnb. Secondly, Gretzel highlights the significance of authenticity, genuine co-creation, and meaningful conversations in social media-based marketing. She emphasizes that DMOs should communicate with personality, injecting humor, and demonstrating empathy. Lastly, within the context of smart tourism, there's an increasing need for DMOs to seamlessly integrate the digital and physical realms. This involves providing the necessary infrastructure to support digital marketing efforts, such as Wi-Fi, beacons, drones, or even creating stages for capturing and sharing compelling tourism experiences. DMOs face the challenge of making themselves visible and effectively using these initiatives as touchpoints with travelers and integrated marketing opportunities.

In a 2017 review paper examining the evolution of technology in Destination Marketing since the turn of the millennium, Li et al. delve into the central question of whether the roles of Destination Marketing Organizations (DMOs) and tourism communities increasingly align with the principles of co-creation and presumption. "Presumption" within tourism is described as the consumer's involvement in value creation activities that result in the production of products they subsequently consume and transform into their own unique consumption experiences. This concept aligns with the broader idea of value co-creation, where tourists actively contribute to the creation of value through their own actions and experiences.

The study categorizes relevant scientific literature that discusses the impact of technology in destination marketing. Through content analysis, the authors conceptualize the changes taking place in DMOs worldwide. They conclude that DMOs have undergone profound transformations in their virtual communication approaches.
Traditionally, launching an official destination website was seen as pioneering. However, the advent of social media platforms during the Web 2.0 era marked a significant turning point. These platforms democratized the internet space, allowing any tourist to share their travel experiences with a global audience. Consequently, the previously dominant roles of DMOs and mainstream media outlets as primary sources of destination information have eroded.

The implications for destination marketing by DMOs are threefold:

i. DMOs must expand their online presence beyond their own websites and utilize social media platforms to actively engage in the daily interactions of the virtual world.

ii. DMOs have limited control over the user-generated content continuously generated by individual tourists.

iii. DMOs must compete for visibility of their marketing messages on search engines and social media platforms.

The rapid pace of these disruptive technological innovations presents a clear challenge to DMOs, which historically have been slower in adopting new technologies.

Castro et al. (2017) present an empirical study examining Porto’s digital marketing impact during 2013-2014. They introduce an analytical model (refer to Figure 3.2) guiding destination promotion, considering online PR, social media, search engine marketing, and viral marketing. Data sources encompass interviews with tourists and stakeholders, official destination websites, and marketing reports. Findings highlight the significance of efficiently utilizing digital channels to increase visitors, targeting new and returning tourists through specific social media strategies. They stress personalized, information-based approaches over general usage for niche tourism groups. The study underscores the necessity for tangible ROI evidence and measurable performance indicators, particularly for significant investments in integrating social media with tourism processes.
3.2 Social media in destination marketing

Leung et al. (2013) conducted a literature review on the utilization of social media within Tourism and Hospitality. Their research encompassed academic journals spanning the years 2007 to 2011. After subjecting 44 articles to content analysis, representing viewpoints from both consumers and suppliers, several noteworthy findings emerged. Consumer-centric studies predominantly homed in on the utilization and influence of social media during the research phase of travelers’ itinerary planning. On the other hand, examinations focused on suppliers placed a significant emphasis on tasks related to promotion, management, and research, with comparatively little attention directed toward the distribution of products.

The research outcomes underscored the strategic significance of social media in enhancing the competitiveness of the tourism sector. The authors of the study pointed out that existing research in this area predominantly centered on exploring the ways in which social media applications could be employed to promote tourist destinations and businesses. However, they noted a substantial gap in the literature concerning the development of tools and criteria for assessing the effectiveness of social media marketing.
Additionally, the authors observed that within the realm of tourism and hospitality, studies on social media disproportionately favored examining suppliers' use of social media. Even within this subset, the focus remained concentrated on promotional efforts, management strategies, and research functions. Notably, the application of social media in the context of product distribution received limited attention.

Kiráľová & Pavlíčeka (2014) analyzed effective social media campaigns in global tourism and their impact on destination communication and visitor behavior. They argue that a well-crafted communication strategy centered on social media is key to destination visibility. Successful tactics in the crowded social media landscape include novelty, contests, celebrity involvement, uniqueness, unexpectedness, competition, harmony, and engaging design. Key findings from the campaigns studied include:

i. **Common Objectives:** Social media campaigns frequently aim to raise destination awareness, attain global visibility, inspire travel planning, enhance destination image, reach new markets, boost visitor numbers, create buzz, expand email subscriptions, increase Facebook fans, reposition the destination, and revive its appeal.

ii. **Popular Campaign Types:** Competitions, interactive campaigns with celebrities, PC games, and trip planners are often used, either individually or in combination. Prominent social media platforms include Facebook, YouTube, Google, Google Street View, Instagram, Twitter, Flickr, Android apps, and smartphone apps.

iii. **Interactive and Emotional:** Many campaigns encourage creativity and interaction, with participants utilizing geolocation tools, augmented reality, internet games, quizzes, blogs, videos, and more. Emotions are leveraged to intensify the romantic allure of destinations, foster affection, generate desire, and boost holiday bookings.

iv. **Destination Benefits:** Social media campaigns offer numerous advantages for destinations, including ROI, increased visitor numbers, positive awareness, preference growth, awards, publicity, website traffic, Facebook referrals, fan base expansion, user-generated content, ambassador recruitment, and improved public relations.
However, measuring the impact of social media campaigns on actual revenue and visitor statistics is complex. The authors argue that high Facebook likes don't guarantee high visitor numbers. Destinations must correlate social media growth with arrivals and overnight stays, utilizing multivariate testing for more in-depth analysis.

In an almost similar research article, Mariani et al. (2016) scrutinized Italian regional Destination Management Organizations' (DMOs) use of Facebook for destination promotion. Employing big data analysis and interviews with DMO managers, the study sought to quantify factors influencing social engagement. Key findings revealed content preferences—visual posts, especially photos, and moderately lengthy text enhance engagement. However, high post frequency and early morning posts negatively impact engagement. DMOs' thematic posts span art, food, wine, nature, and culture, but consensus lacks on metrics for social media success. Few DMOs measure commercial outcomes due to organizational constraints.

Social media has revolutionized the way individuals plan their travel experiences, altering the manner in which they purchase and engage with tourism offerings. The utilization of social media marketing by Destination Marketing Organizations (DMOs) is still evolving in response to the expanding role of social media in both traveler behavior and the tourism industry as a whole. Additionally, the involvement of influencers has emerged as a valuable tool for promoting destination images.

The literature review conducted by Leung et al. (2013) delved into the utilization of social media by influencers and travel bloggers within the tourism and hospitality sector. Their research revealed that consumers commonly engage with social media content from travel influencers at various stages of their travel journey, including during the planning phase, throughout the trip, and even after their return. In a separate study, Bokunewicz and Shulman (2017) examined the impact of influencer identification within Twitter (X) networks of destination marketing organizations. Meanwhile, Jaya and Prianthara (2018) explored the link between influencer marketing on Instagram and the creation of destination brands. In influencer marketing, the expectation is that individuals will disseminate information through their personal social media platforms. Consequently, most influencer campaigns incorporate a content element aimed at shaping a brand's image and influencing the purchasing decisions of their followers.
Most recently, in a study by Kilipiri et al. (2023), the authors shed light on the realm of Instagram Influencer Marketing, with a specific focus on the promotion of sustainable destinations. Their research encompassed an analysis of 30 cases posted between 2017 and 2019. Additionally, since digital influencers often provide geographic information, such as geo-tags and geo-hashtags, in their posts to inspire their audience, reach a wider viewership, and garner increased engagement, the researchers scrutinized the role of geo-location data employed by Instagram travel influencers in users' decision-making processes.

By the employment of a mixed-method approach, combining cross-sectional and quantitative analysis of panel data, their findings indicated a positive association between Instagram travel influencers, acting as social media communicators, and the selection of sustainable destinations. However, the use of geo-location data by these influencers did not significantly impact travelers' intentions to choose such destinations.

### 3.3 Destination Branding

Destination brand building is a complex process involving the creation and management of a distinct and appealing identity for a specific place. Successful branding attracts tourists, businesses, and investments, contributing to economic development and positive perceptions of the location. Goyal's work (2021) outlines three pillars for building destination brands:

i) **Brand Placement:** Involves featuring the destination in visual and audio media like movies, social media, or songs for promotional purposes. For instance, the village of Júzcar in Spain gained international recognition after being painted entirely blue, creating a "Smurf Village" for a movie promotion. This transformed the village into a tourist hotspot, drawing visitors worldwide.

ii) **Brand Community:** Refers to groups of individuals—locals and visitors—sharing common interests or affiliations with a destination, forming communities both online and offline.

iii) **Storytelling:** Utilizing narratives and stories to craft a compelling brand identity for a destination. Effective storytelling captures the essence, culture, and unique
qualities of the place, resonating with audiences and creating an emotional connection.

Leveraging new media is crucial for emerging destinations to gain awareness, considering widespread internet access and social media engagement. However, a comprehensive approach involving consistent communication across various platforms, storytelling, and community development efforts is necessary for effective destination brand building.

Studies by Liu et al. (2015) emphasize the impact of product placement in social media, akin to other media forms, potentially leading to deeper brand comprehension. Brand personality, as explored by Kim and Lee (2015), influences visitor perceptions; different personality traits correlate with diverse city images and intentions to revisit.

Understanding comparative advantage (essential resources possessed by a destination) and competitive advantage (effective utilization of these resources) is vital for a destination's competitiveness (Kotler et al., 2019). Morrison's PIB model in 2013 (Positioning, Image, Branding) offers a strategic marketing framework involving destination positioning (how a destination distinguishes itself) and destination image (perceptions individuals hold about a place). Thorough market research and competitor analysis are crucial for employing this model effectively.

In conclusion, destination brand building involves a multi-faceted approach encompassing various strategies like brand placement, community engagement, storytelling, and understanding a destination's image and positioning in the market, emphasizing the importance of cohesive and strategic marketing efforts for sustainable growth and recognition.
Figure 3.3: The PIB model
Tourism is a crucial sector for Greek economy. According to statistical data of the Association of Greek Tourism Enterprises (SETE, 2023b), in 2022, tourism made a direct economic contribution of approximately €23.9 billion to the country, equivalent to 11.5% of the GDP. When accounting for the multiplier effects, the total impact of tourism on the country's economy in 2022 is estimated to range from €52.6 billion to €63.4 billion, representing between 25.3% and 30.5% of the GDP. Moreover, while between 2021 and 2022, the GDP experienced a remarkable growth of +14.5%, during the same period, the tourism sector exhibited a substantial surge of +59.3%, translating to a direct increase of €8,906 million and an overall increase of €19,592 million to €23,600 million when considering both direct and indirect contributions.

As seen in Table 4.1 and Figure 4.1, inbound tourism increased continuously from 2010 to 2019. Being temporarily slowed down by the Covid-19 pandemic between 2020 and June 2021, currently is trying to reestablish the same pace as before the crisis.

4. TOURISM SECTOR IN GREECE

<table>
<thead>
<tr>
<th>Non-Residents Arrivals from Abroad (in th.)</th>
<th>Non-Residents Overnight Stays (in th.)</th>
<th>Expenditure (Receipts) of Non-Residents in Greece (in million €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>15,007</td>
<td>140,176</td>
<td>9.611</td>
</tr>
<tr>
<td>16,427</td>
<td>150,978</td>
<td>10.505</td>
</tr>
<tr>
<td>15,518</td>
<td>140,919</td>
<td>10.025</td>
</tr>
<tr>
<td>17,920</td>
<td>160,251</td>
<td>11.707</td>
</tr>
<tr>
<td>22,013</td>
<td>184,789</td>
<td>13.005</td>
</tr>
<tr>
<td>23,595</td>
<td>185,027</td>
<td>13.677</td>
</tr>
<tr>
<td>24,709</td>
<td>190,402</td>
<td>12.749</td>
</tr>
<tr>
<td>27,194</td>
<td>209,855</td>
<td>14.202</td>
</tr>
<tr>
<td>30,123</td>
<td>27,012</td>
<td>15.653</td>
</tr>
<tr>
<td>31,348</td>
<td>231,464</td>
<td>17.680</td>
</tr>
<tr>
<td>7,374</td>
<td>64,653</td>
<td>4.310</td>
</tr>
<tr>
<td>14,705</td>
<td>131,357</td>
<td>10.328</td>
</tr>
<tr>
<td>27,836</td>
<td>216,949</td>
<td>17.257</td>
</tr>
</tbody>
</table>

Source: SETE (2023a)
In 2022 almost reached the levels of 2019 and according to temporary statistical data of 2023 (SETE, 2023c), between January and July, the volume of inbound visits surged significantly by 21.9%, reaching a total of 16,170 thousand travelers, compared to 13,261 thousand in the corresponding period of 2022. Notably, international road arrivals experienced a substantial upswing of 35.8%, indicating an increase of 2.0 million travelers.

During the same period of 2023, visits from EU-27 countries amounted to 9,720 thousand travelers, showcasing a noteworthy growth of 20.5% in contrast to the corresponding period in 2022. Concurrently, visits from non-EU-27 countries exhibited a considerable increase of 24.1%, totaling 6,450 thousand travelers. Inflows from nations within the euro area saw a moderate rise of 14.1%, while visits from EU-27 countries outside the euro area demonstrated a remarkable expansion of 35.3%.

Regarding visits from countries beyond the EU-27, the United Kingdom witnessed a modest increase of 3.2%, with 2,096 thousand travelers, whereas the United States experienced a substantial surge of 43.5%, with 737 thousand travelers. Conversely, travel from Russia experienced a slight decline of 1.8%, totaling 20 thousand travelers.

Simultaneously, travel receipts during this period exhibited an impressive increase of 20.2% compared to the same period in 2022, amounting to €10,321 million.

The geographical regions that mostly contribute to the national touristic income are, according to 2022 data (SETE, 2023b):

- South Aegean (Cyclades, Dodecanese): 27%
- Crete: 21%
- Attiki (Athens & surroundings): 17%
- Ionian Islands: 15%
- Central Macedonia (Thessaloniki, Halkidiki): 9%

Total inbound visits during the period 2016-2021 are shown in table 4.2, where the reader can see that the above destinations are (more or less in the same order and percentage) the most popular, with the exception of pandemic period of 2020-2021E.
As anticipated, within the various regions of Greece, the South Aegean and Crete, both of which are islands, collectively account for the largest portion of incoming tourism arrivals and revenue, amounting to nearly half of the total revenue generated from incoming tourists (Yiannakou et al., 2022).

Table 4.2: Total visits per geographical Region (2016-2021)

Finally, regarding the blend of incoming tourism, the most significant markets in 2022 (SETE, 2023a) were those of Germany (21.7% of total overnight stays), UK (18.7%), France (7.4%), USA (6.1%), Italy (5.5%), Netherlands (4.6%), Romania (4.4%), Cyprus (3.3%), Austria (2.5%) and Belgium (2.3%).

4.1 Characteristics of the tourism product

As outlined in the National Tourism Strategic Plan (SETE, 2021), the country’s array of tourism offerings comprises five core tourism products and an additional seven complementary (Figure 4.2). These supplementary options serve to either enrich and
improve the visitor's experience (referred to as enablers) or cater to specific market segments (referred to as niche products).

**Figure 4.2: Tourism products of Greece**

Source: SETE, 2021

**Strengths of Greek Tourism:**

Greek tourism showcases several strengths, including its significant volume of international arrivals, positioning it among Europe's top ten airline markets. It ranks among the top five globally recognized tourism brands and demonstrates high competitiveness. Greece's allure lies in its natural beauty, historic ruins, and picturesque landscapes. The country has invested in air accessibility infrastructure, enhancing flight services. Accommodation infrastructure and hospitality culture have seen substantial improvement over the last decade. With over 6,000 islands and an extensive coastline, Greece offers island-hopping opportunities and boasts rich cultural heritage, attracting history enthusiasts. Its Mediterranean cuisine and favorable climate throughout the year further contribute to its appeal.

**Weaknesses of Greek Tourism:**

However, the tourism industry suffers from seasonal dependency, primarily thriving in the third quarter, leading to off-season income limitations. The focus on five out of thirteen regions creates a concentration of tourism, limiting growth in other areas. Intense competition from Mediterranean destinations poses challenges. Infrastructure deficiencies, including transportation,
healthcare, and waste management, affect the tourism experience. Urban environment issues and concerns regarding environmental degradation due to over-tourism impact Greece's natural beauty. Pricing disparities and limited recreational activities restrict accessibility and experiences for budget-conscious travelers. Additionally, the emphasis on classical antiquity overlooks other historical epochs and contemporary culture, limiting the diversity of the cultural tourism product.

Figure 4.3: The spatial Greek prefectures according to their seasonality (RSI) and level of saturation (RST)

Source: Tsiotas et al., 2020

It is interesting to underline that despite the efforts to promote different tourism products that could expand the touristic period throughout the whole year, it seems that seasonality is one of the main problems that Greek tourism is facing. Seasonality gives rise to economic and social disparities within regional economies. It compels tourism businesses to confront elevated fixed costs to fulfill the operational requirements during the peak season, consequently elevating the average operational expenses and diminishing overall profitability. Moreover, this phenomenon significantly influences workforce composition by providing temporary employment prospects, which typically lack high levels of specialization, education, and training. The effectiveness of destinations in adeptly managing the irregular distribution of tourism demand throughout the year largely determines these consequences (Polyzos, 2019).

An interesting study of the relationship between tourism seasonality and saturation for the Greek prefectures (Tsiotas et al., 2020) showed that the majority of areas connected
with the “sun and beach” concept, ie seasonal tourism, face saturation stage in their Tourism Area Life Cycle-TALC (Figure 4.3)

4.2 Promotion and digital marketing

Greece's tourism heavily relies on effective marketing, where digital platforms like VisitGreece, managed by the Greek National Tourism Organization (GNTO / EOT), play a crucial role. The VisitGreece web portal and mobile application provide comprehensive and real-time information about Greek tourism. The app, available on IOS and Android platforms, offers travelers immediate access to travel details, cultural events, and e-ticketing for museums and sites. It covers accommodations, dining, nightlife, beaches, and activities, enhancing users' travel experiences. The "MyWallet" feature enables seamless transactions within Greece. VisitGreece extends its reach through social media platforms, generating engaging content like blog posts, videos, and interactive guides. The country also employs targeted email campaigns and a monthly e-newsletter since 2010, complementing social media efforts with more detailed descriptions, enhancing customer relationships and sharing updates effectively (Vazou 2020). Overall, VisitGreece serves as a vital, user-friendly digital resource tailored to enhance travelers' knowledge and experiences while promoting Greece as a prime tourist destination.

Furthermore, Marketing Greece S.A., a not-for-profit organization established in 2013 by SETE and EEE, aims to revitalize Greek tourism. Its platform, Discovergreece.com, showcases Greece's attractions, culture, and lifestyle in 9 languages through premium content like videos and photos. The site offers an intuitive interface for users to explore destinations, heritage, cuisine, and nature. With an active social media presence and 1.5 million followers, Discovergreece.com shares travel insights, motivating future trips. Moreover, it serves as a channel for Greek tourism businesses to engage with global travelers by displaying their services on the Travel Pages. Presently available in multiple languages, the platform communicates fresh ideas and travel suggestions, fostering continuous engagement with travelers planning trips to Greece.
Figure 4.4: Sample from #VisitGreece

**Facebook**
Discover monuments spanning the long and eventful Peloponesian history! #VisitGreece

**Twitter**
Live your honeymoon holidays in Eastern Halkidiki! 
#Greece #VisitGreece 
http://www.blog.visitgreece.gr 
#liveyourhoneymoons 
holidays-in-eastern-halkidiki/

**Instagram**
Messenia is a breathtaking medieval tower town for a weekend full of experience! 
#VisitGreece #Greece #Messenia #Peloponnesse

**Teaser**
Humm... Still in Crete. Let's try something different.

In Crete again, or haven't left yet? Who says that during your summer holidays all you can enjoy is sun-lashed beaches and water sport activities? Well... in Crete at the same time you can enjoy night life to its maximum, live for a while like a millionaire, sunbath with the beau monde and find peace of mind on a serene island teeming with history that has inspired best-selling famous writers. Try some of the things on offer, or why not? Try them all! Read more...

Source: Vazou (2020)
Figure 4.5: Sample from #DiscoverGreece

Discover Greece is the go-to place for Greek holidays, with destination guides, bestable experiences and best of lists of
unmissable things to see and do. Top beaches and water sports spots, cultural highlights, outdoor activities, food &
wine tours, villages, boat trips ... you name it. We've got suggestions for families, couples and friends and for those
travelling solo.

And we're not just talking about the legendary Greek islands. The mainland is another treasure trove of hidden gems.
We've got suggestions for every season, how to beat the crowds, how to eat like a Greek, sustainability guides, itinerary
suggestions and much more... all designed to make your trip to Greece unforgettable and hassle-free.
5. CASE STUDY: HALKIDIKI

Halkidiki is one of the two major touristic destinations in Central Macedonia region (see Tables 5.1 and 5.2). And while Thessaloniki is a big city destination, Halkidiki is the most important Sun & Beach destination of mainland Greece with the potential to become a luxury destination.

Halkidiki has significant resources for the enrichment of Sun & Beach and the extension of the tourist season, while there is also the possibility of exploiting synergies with the urban center of Thessaloniki (SETE, 2021).

Table 5.1: Visits (in th.) per Country of Origin in Central Macedonia (2016-2021)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CENTRAL MACEDONIA</td>
<td>28.375.8</td>
<td>31.021.3</td>
<td>34.831.1</td>
<td>36.643.1</td>
<td>8.287.6</td>
<td>16.375.9</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>6.294.8</td>
<td>7.262.4</td>
<td>7.820.2</td>
<td>6.700.8</td>
<td>1.279.6</td>
<td>2.923.7</td>
</tr>
<tr>
<td>Germany</td>
<td>1.491.0</td>
<td>1.700.2</td>
<td>1.911.0</td>
<td>1.330.8</td>
<td>208.4</td>
<td>528.7</td>
</tr>
<tr>
<td>North Macedonia</td>
<td>754.1</td>
<td>785.6</td>
<td>904.7</td>
<td>624.2</td>
<td>249.1</td>
<td>475.8</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1.631.8</td>
<td>1.554.1</td>
<td>1.149.0</td>
<td>874.3</td>
<td>208.6</td>
<td>461.2</td>
</tr>
<tr>
<td>Russia</td>
<td>144.8</td>
<td>151.3</td>
<td>306.6</td>
<td>343.9</td>
<td>98.1</td>
<td>147.1</td>
</tr>
<tr>
<td>Serbia</td>
<td>64.7</td>
<td>68.7</td>
<td>76.6</td>
<td>71.2</td>
<td>45.3</td>
<td>314.9</td>
</tr>
</tbody>
</table>

Source: Hellenic Republic – Ministry of Tourism (2023)

Table 5.2: Hotel-type accommodations’ beds per sub-Region of Central Macedonia

<table>
<thead>
<tr>
<th>Sub-Region</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>HALKIDIKI</td>
<td>48.039</td>
<td>48.837</td>
<td>49.576</td>
<td>49.091</td>
<td>50.188</td>
<td>50.069</td>
</tr>
<tr>
<td>THESALONI</td>
<td>14.378</td>
<td>14.403</td>
<td>15.662</td>
<td>15.336</td>
<td>15.460</td>
<td>15.735</td>
</tr>
<tr>
<td>PELIA</td>
<td>2.046</td>
<td>2.864</td>
<td>2.736</td>
<td>2.769</td>
<td>2.753</td>
<td>2.752</td>
</tr>
<tr>
<td>SERRES</td>
<td>2.056</td>
<td>2.056</td>
<td>2.056</td>
<td>2.231</td>
<td>2.249</td>
<td>2.208</td>
</tr>
<tr>
<td>IMATHIA</td>
<td>1.486</td>
<td>1.486</td>
<td>1.486</td>
<td>1.419</td>
<td>1.546</td>
<td>1.546</td>
</tr>
<tr>
<td>KOURI</td>
<td>800</td>
<td>800</td>
<td>800</td>
<td>971</td>
<td>1.030</td>
<td>1.034</td>
</tr>
</tbody>
</table>

Source: Hellenic Republic – Ministry of Tourism (2023)
5.1 Characteristics of the destination

5.1.1 Geographic Description

Halkidiki, alternatively known as Chalkidiki or Chalkidike, is an enchanting northern region of Greece, distinguished by its breathtaking natural landscapes and cultural richness. The peninsula stretches into the Aegean Sea, resembling a hand with three distinct "fingers" - Kassandra, Sithonia, and Mount Athos, each offering unique experiences.

Contrary to bustling urban hubs, Halkidiki is adorned with charming small towns, picturesque villages, and tourist-oriented resort areas. Noteworthy settlements include Polygyros, the administrative capital, Nea Moudania - a major town serving as a commercial center and transit point, and Nea Kallikrateia, a coastal gem on the Kassandra Peninsula.

Kassandra and Sithonia, the prominent peninsulas, host various tourist resorts and towns like Kallithea, Pefkohori, Nikiti, and Sarti, drawing visitors, especially during the vibrant summer months. Ierissos and Ouranoupoli stand as pivotal entry points to Mount Athos, renowned for its spiritual significance in Orthodox Christianity.

The region boasts captivating attractions, as per travelers' choices on platforms like TripAdvisor. Idyllic spots like Kavourotripes, Kalogria Beach, Kallithea, and Afytos top the list, alongside Ammouliani Islet and numerous other stunning locales dotting Sithonia and Kassandra.

Halkidiki's coastal expanse, extending approximately 500 kilometers, offers 328 captivating beaches, 86 of which have been honored with the prestigious "blue flag" distinction, attesting to their pristine beauty and quality. The region's marine areas, including various gulfs, offer ample opportunities for nautical tourism, facilitated by marinas and tourist boat shelters.

Beyond its coastal allure, Halkidiki boasts diverse inland attractions. Mountainous areas like Mount Holomontas and Mount Stratoniko present untapped potential for tourism development. Historical treasures such as the cave of Petralona, housing
ancient human remains and Paleolithic artifacts, and archaeological sites like Olynθhos and Ancient Stageira, Aristotle's birthplace, offer glimpses into Greece's rich past.

The spiritual enclave of Mount Athos, designated a UNESCO World Heritage Site, houses 20 monasteries, encapsulating architectural marvels and spiritual significance within its sacred bounds.

Modern cultural events further enrich Halkidiki's appeal, featuring festivals like Sanì's artistic celebration, Siviri's theater and musical events, and Polygyros' traditional August festivities. The region offers diverse recreational resources, including trekking paths, a climbing track in Loutra, a casino at Porto Carras Grand Resort, and the Halkidiki Wine Route, showcasing esteemed wine estates and varieties like PDO Pagies Melitona and PGI wines.

Halkidiki, with its fusion of historical, natural, and cultural splendors, stands as an alluring destination, inviting visitors to immerse themselves in its diverse offerings and captivating beauty.

5.1.2 Halkidiki tourism statistics

According to SETE statistical data (2022), Halkidiki Regional Unit represents ca. 4.5% of visits and 5.7% of overnight stays in Greece, within the period 2015 to 2021 (Table 5.3). Yet, when excluding the years of pandemia, Hotel arrivals in Greece increased by 46% and overnight stays by 42%, but in Halkidiki the respective figures were 44% and only 29%.

In the same period, the average number of average stays in Halkidiki are slightly above the country average (4.7 nights and 4, respectively).
Table 5.3: Hotel-type statistics of Halkidiki (2015-2021)

<table>
<thead>
<tr>
<th>Arrivals at hotel accommodations</th>
<th>2015</th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>18,478,701</td>
<td>27,063,766</td>
<td>14,595,911</td>
</tr>
<tr>
<td>Central Macedonia</td>
<td>2,392,102</td>
<td>3,092,167</td>
<td>1,658,459</td>
</tr>
<tr>
<td>Halkidiki</td>
<td>750,361</td>
<td>1,077,714</td>
<td>683,120</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overnight stays at hotel accommodations</th>
<th>2015</th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>76,772,113</td>
<td>109,206,980</td>
<td>58,344,644</td>
</tr>
<tr>
<td>Central Macedonia</td>
<td>8,194,395</td>
<td>10,809,343</td>
<td>5,792,499</td>
</tr>
<tr>
<td>Halkidiki</td>
<td>4,393,872</td>
<td>5,647,006</td>
<td>3,336,393</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Average stays (nights)</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>4.2</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Central Macedonia</td>
<td>3.4</td>
<td>3.5</td>
<td>3.5</td>
</tr>
<tr>
<td>Halkidiki</td>
<td>5.0</td>
<td>4.5</td>
<td>4.4</td>
</tr>
</tbody>
</table>

Table 5.4: Tourism-related businesses in Halkidiki

The tourism related available accommodations in Halkidiki, are shown in table 5.4 and these represent ca. 6.6% of the total capacity of the county and 53% of the capacity in Central Macedonia region.
5.1.3 Types of tourism attracted

As previously mentioned, the Sun & Beach experience stands out as the most prominent and sophisticated tourism offering of the destination. Halkidiki benefits from a sun-drenched and warm climate and boasts an extensive coastline stretching approximately 550 kilometers. It proudly hosts the highest number of blue flag beaches in Greece and enjoys convenient road connections from neighboring Balkan countries. With Thessaloniki Airport "Macedonia" situated nearby and a substantial number of high-end seaside hotels and resorts, the region holds significant potential for well-developed tourist accommodations. It is strategically positioned as one of the emerging luxury destinations in Greece. However, several challenges exist, including critical infrastructure issues such as a subpar road network, limitations in intra-regional connectivity, as well as concerns related to water supply and urban waste management. Additionally, the prevailing tourism model leans heavily towards mass tourism with limited value-added and noticeable seasonality.

*Figure 5.1: Product focus and target markets for destination Halkidiki*

The existing established markets for the destination Halkidiki are: Germany, United Kingdom, Cyprus and the Balkan countries (focus on Serbia, Bulgaria, Romania, North Macedonia). Russia was also included in the above list before the war in Ukraine, but arrivals diminished in 2022. Accordingly, the existing and/or new target markets for development are: Other European countries (focus on Italy, France, Poland, Sweden, Denmark, Belgium, Netherlands, Austria), Turkey and Israel (SETE, 2021).
In 2019, Mavragani et al. carried out an intriguing analysis of Halkidiki travelers, utilizing their social media posts for segmentation. Traditionally, customer profiling techniques in hospitality marketing have primarily relied on demographic factors like age, gender, and nationality to categorize target audiences. However, these approaches tend to overlook the significance of qualitative data, contextual insights, and behavioral traits, all of which could potentially provide a more comprehensive understanding of the largely unexplored online tourist persona (Amaro, et al., 2016).

The researchers aimed to correlate the content posted on social media by Halkidiki visitors with the cultural traits, preferences, and demographic profiles of the users who shared them, with the intention of establishing a framework for audience segmentation. To collect and analyze the research data, they studied 272 social media profiles to identify the distinctive characteristics of tourists frequenting the area of interest. The sample was drawn from a random selection of profiles across various social media platforms such as Instagram, Facebook, and Twitter. Data collection spanned a period of 4 months, from the commencement of July to the conclusion of October 2017.

As stemming from this study and as also emphasized by SETE in 2021, the main touristic products of Halkidiki, are definitely Sun & Beach and Culinary Tourism. Further key tourism products with potential for expansion and advancement, are Nautical Tourism (yachting, Cultural & Religious tourism and MICE (Meetings, Incentives, Conferences, and Exhibitions).

5.2 Destination analysis

5.2.1 Analysis per Dickman’s 5 As

Dickman (1989) put forward the idea that the foundation of any tourism destination should revolve around five key components, referred to as the '5 As,' in order to effectively captivate its visitors. These components include 'Attractions,' which can be classified into natural, man-made, or cultural elements, as well as intangible features like music, art, gastronomy, and theater. These attractions generally act as the primary driving force for tourists when selecting a particular destination and significantly influence their overall experiences. In terms of 'Accessibility,' it involves the modes of
transportation that enable tourists to access and traverse the destination, encompassing various infrastructure components such as road networks, airports, ports, and railway systems. Additionally, 'Accommodations' encompass the infrastructure that facilitates the hospitality of visitors at the destination, incorporating facilities like hotels, restaurants, and related amenities. 'Amenities' refer to the diverse infrastructure provisions that ease the movement of visitors, including public transportation options like metros, trams, and buses, as well as parking, Wi-Fi networks, disability-friendly infrastructure, and health and sanitation facilities. The 5th A, 'Activities' entails the management of visitors' leisure time at the destination, providing a spectrum of recreational, sporting, and educational opportunities.

5 As framework is a comprehensive model for destination analysis, which examines the key dimensions contributing to the success and development of a tourist destination and Dickman stressed the vital importance of successfully developing these five As for the overall prosperity of tourism initiatives\(^1\).

Analyzing Halkidiki as the above framework, results to the following:

**Attractions:** Halkidiki boasts a rich array of attractions, including its extensive coastline of approximately 550 kilometers, numerous blue flag beaches, and a sunny climate. Its cultural and historical attractions, such as archaeological sites, monuments, and Mount Athos, although less developed and promoted compared to other historical sites in Greece, contribute significantly to its appeal. Moreover, a number of cultural events are organized locally, especially in the summer. The region's natural beauty, comprising diverse landscapes and scenic beauty, adds to its allure as a tourist destination.

**Activities:** Halkidiki offers a wide range of activities for tourists, including various water-based activities such as yachting and nautical tourism, owing to its three marinas and advantageous coastal location. Cultural and religious tourism activities centered

\(^1\) According to the World Tourism Organization (UNWTO, 2007), there are three supplementary components: 'Image' (incorporating the distinctiveness of the destination and its acknowledgment), 'Price' (representing value for money that can entice visitors to the destination), and 'Human factor' (encompassing the personnel and local community members who engage with tourists to create a comprehensive tourist experience).
around archaeological exploration and visits to historical sites, as well as pilgrimages to Mount Athos, provide additional avenues for tourist engagement. The region also supports MICE activities, taking advantage of its convenient geographical location and access to Thessaloniki Airport.

**Accessibility:** Halkidiki benefits from easy road accessibility from neighboring Balkan countries and is in close proximity to Thessaloniki Airport. This accessibility facilitates smooth travel for tourists, enhancing the overall appeal of the destination. However, the local infrastructure in the prefecture, particularly the road network, faces certain challenges (narrow roads, especially in the mountainous areas), which can impact the overall tourist experience.

**Accommodation:** The region offers a diverse range of related infrastructure, from a significant number of luxury seaside hotels and resorts, to rental rooms and camping, catering to the needs of tourists of all budgets seeking accommodation.

**Amenities:** The primary mode of public transport is buses, which connect various towns and villages within the region. Yet, the more remote areas, do not have extensive public transportation. There is no railroad network in the prefecture, while local boat transport and/or boat excursions are practically also not existing. Wi-Fi access is in acceptable level in hotels and rented rooms, but there is no availability of public Wi-Fi networks in any town. Lastly, Halkidiki has health centers, a hospital, and pharmacies, particularly in the more populated areas, to cater to the healthcare needs of both residents and tourists. However, the availability of these facilities might vary depending on the specific location within the region.

Overall, while Halkidiki demonstrates strengths in attractions, activities, and accessibility, certain challenges related to infrastructure and amenities require attention to enhance the overall tourism experience and sustain the region's development as a premier destination.
5.2.2 Destination lifecycle

By the Tourism Area Life Cycle-TALC theory (Lagiewski, 2006, Polyzos et.al, 2013), Halkidiki, being a popular tourist destination in Greece, is generally considered to be in the stage of maturity within the destination lifecycle. It has established itself as a well-known and popular destination for both domestic and international tourists, particularly known for its beautiful coastline, beaches, and historical attractions. However, the region is still actively seeking to expand its offerings and improve its infrastructure to cater to evolving tourist demands. Given its efforts to promote various types of tourism, including cultural and nautical tourism, as well as its initiatives to enhance the overall tourist experience, it may be positioned to potentially transition into a stage of rejuvenation or even continued growth within the destination lifecycle curve.

5.2.3 SWOT Analysis

A SWOT analysis for Halkidiki as a destination is the following:

Strengths:

- Natural beauty and diverse landscapes, including a long coastline and numerous blue flag beaches.

- Rich cultural and historical heritage, with significant archaeological sites and monuments.

- Proximity to Thessaloniki Airport, facilitating easy access for international visitors.

- Well-established tourism infrastructure, including luxury hotels and resorts.

- Collaborative efforts by organizations like Halkidiki Tourism Organisation (HTO) and Visit Greece to promote the region.
Weaknesses:

• Limited public transportation options within the region, especially in more remote areas.

• Seasonal tourism dependency leading to fluctuating demand and revenues.

• Existing challenges in the infrastructure, particularly the road network, affecting the overall tourist experience.

• Relatively limited accessibility for people with disabilities in some areas.

• Potential environmental concerns due to increased tourist activity and development.

Opportunities:

• Diversification of tourism offerings, including the development of cultural and religious tourism.

• Expansion of nautical tourism through the enhancement of marinas and related facilities.

• Implementation of sustainable tourism practices to preserve the region's natural beauty and cultural heritage.

• Collaboration with neighboring regions to create combined tour packages and promote broader regional tourism.

• Capitalizing on the growing trend of experiential and eco-tourism to attract a more environmentally conscious tourist segment.

Threats:

• Intense competition from other popular Mediterranean destinations offering similar attractions and services.

• Potential negative impacts from global events, such as economic downturns and pandemics, affecting international travel.
• Environmental degradation and strain on natural resources due to uncontrolled tourism development.

• Changing consumer preferences and demands, requiring continuous adaptation and innovation to meet evolving tourist needs.

• Potential disruptions in the regional political and economic landscape impacting the tourism sector.
6. ASSESSMENT OF DIGITAL PRESENCE AND IMPACT OF THE DESTINATION

6.1 Digital promotion of the destination Halkidiki

With the support of Visit Greece, the national tourism organization (GNTO), and the tourism departments of the five municipalities within the Halkidiki prefecture, the Halkidiki Tourism Organization (HTO) has established the website www.visit-halkidiki.gr.

HTO, founded in 2008, operates as an independent, non-governmental, and non-profit entity, dedicated to promoting Halkidiki as a prominent global holiday destination. Collaborating closely with affiliated bodies such as the Halkidiki Hotel Association, Halkidiki camping association, Federation of Holiday Rooms and Apartments in Halkidiki, and the Halkidiki Chamber, the organization executes customized marketing strategies. It also engages in strategic partnerships with travel agencies, online operators, media platforms, carriers, and various industry stakeholders within Halkidiki.

The digital network expands its reach through various VisitHalkidiki profiles on leading social media channels, including:

- Facebook (‘visit-halkidiki’ profile with 80k likes and 83k followers, as well as the ‘Halkidiki - Inside Your Dreams’ public group with 7.6k members),

- Instagram (19.8k followers, 1700 posts until Nov 2023),

- YouTube (462 subscribers and 37 videos), and

- X-Twitter (4018 followers)

- Pinterest (381 followers, 2.2k monthly views)

Furthermore, it maintains a blog with engaging content (14 thematic posts until Nov 2023) and interactive brochures / maps / guides.

Regarding accommodation, Visit-Halkidiki refers the visitor to the following sites:
– www.halkidiki-hotels.gr (Halkidiki Hotel Association), that maintains also a public Facebook group with 748 members

– www.halkidiki-holidays.gr (Federation of holiday rooms & apartments in Halkidiki), with a respective Facebook profile (674 likes, 723 followers)

– www.campsite-halkidiki.gr (Camping Association of Halkidiki), that also maintains a public Facebook group with 824 members.

Nevertheless, in contrast to the above, a 2020 study of Ziakis and Vlachopoulou that examined the utilization of digital marketing tools by tourism enterprises operating in Halkidiki, revealed that the adoption of digital marketing techniques is not satisfactory and only 53% of tourism businesses are familiar with SEO practices.

6.1.1 Presence in Social Media

Visit-Halkidiki posts consistently every Monday, Wednesday and Friday in Facebook, X (Twitter) and Instagram. Themes are different in each channel each time, but of course, several themes are repeated from one channel to the other.

Topics vary from natural landscapes (coasts, beaches, mountainous regions), to culinary (local flavors and dishes), local towns, historical monuments, local fests etc. and they are always associated with the season of the year.

Reactions, comments and reposts vary depending on the theme, with those of iconic Halkidiki beaches being the most popular, as expected.

6.2 Comparative digital impact of Halkidiki and equivalent destinations in Greece

In this paragraph we analyze the impact of Halkidiki as a destination in comparison with certain equivalent destinations in Greece, according to the popularity they have in the web. In order to do this we used Google Trends, which is a tool provided by Google.
Google Trends allows users to analyze the popularity of search queries over a specific period of time. It provides insights into the relative frequency of searches for different terms, topics, or keywords on Google. The data is presented in the form of graphs, showing how search interest has changed over time.

It is useful for businesses, marketers, and researchers to understand which topics or keywords are more popular or trending over a time period, since it maintains both historical and near-real-time data.

It's important to note that while Google Trends provides valuable insights, it doesn't provide the absolute search volume numbers. Instead, it shows the relative popularity of search terms compared to the total search volume on Google.

The following steps were taken:

1. Comparative analysis of popularity among the following equivalent destinations (ie “sun & sea” destinations) within a period of 5 years (June 2018- June 2023).
   The destinations examined were:
   i. Halkidiki
   ii. Rhodes
   iii. Kos
   iv. Corfu
   v. Zakynthos
   vi. Paros
   vii. Naxos

2. Analysis of popularity of Halkidiki per country of origin of the queries within the period

3. Comparative analysis of popularity per country of origin for the 7 destinations
4. Top most popular Halkidiki related search queries in the last 5 years, ie terms that were also searched by users searching for ‘Halkidiki’.

6.3 Results of the analysis

6.3.1 Comparison of 7 tourism destinations

The results of the comparison of 7 destinations in Google Trends, in category ‘Travel’, are shown in Figure 6.1. According to this:

- One can distinguish 3 groups of destinations, in terms of popularity (see also figures 6.2 and 6.4):
  a. Corfu, Rhodes
  b. Zakynthos, Kos
  c. Paros, Naxos, Halkidiki

- User searching was more intense in 2019, followed by 2018 (Figure 6.3). Between 2020 and 2021, interest of travelers was expectedly decreased due to the pandemic and the curfew measures to increase back again in 2022 and 2023, without still reaching the pre-pandemic figures.

- There is a yearly pattern of increased popularity of all destinations starting from mid April and ending at mid October

- The 2019 July pick of Halkidiki (Figure 6.1) was due to sudden storms and floods that took place on 10/7/2019, which resulted in damages and loses of people.

- Average proportional interest per destination seems to remain constant throughout the examined period (see figure 6.3) and fluctuations are not statistically significant.
Figure 6.1: Web search statistics between June 2018 - June 2023
Figure 6.2: Average popularity per destination 2018-2023

Figure 6.3: Average popularity per year 2018-2023
6.3.2 Countries of origin of searches

As per origination of web searches for ‘Halkidiki’ in the period 2018-2023, as can be seen in figure 6.5, apart from Greece, the most intense searches came from Balkan countries and especially Bulgaria, North Macedonia and Serbia, as well as from Cyprus.

Figure 6.5: Countries of origin for Halkidiki search term 2018-2023
Table 6.1: Search queries per country of origin and destination 2018-2023

<table>
<thead>
<tr>
<th>Country</th>
<th>Halkidiki</th>
<th>Corfu</th>
<th>Rhodes</th>
<th>Naxos</th>
<th>Paros</th>
<th>Zakynthos</th>
<th>Kos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulgaria</td>
<td>43%</td>
<td>37%</td>
<td>11%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
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<td>1%</td>
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<td>38%</td>
<td>22%</td>
<td>2%</td>
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<td>11%</td>
<td>7%</td>
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<td>2%</td>
<td>2%</td>
<td>8%</td>
<td>4%</td>
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<tr>
<td>Cyprus</td>
<td>11%</td>
<td>27%</td>
<td>31%</td>
<td>10%</td>
<td>18%</td>
<td>2%</td>
<td>2%</td>
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<tr>
<td>Romania</td>
<td>9%</td>
<td>36%</td>
<td>20%</td>
<td>3%</td>
<td>4%</td>
<td>25%</td>
<td>3%</td>
</tr>
<tr>
<td>Slovakia</td>
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<td>28%</td>
<td>36%</td>
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<td>16%</td>
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<td>19%</td>
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<td>4%</td>
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<td>6%</td>
<td>10%</td>
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<td>22%</td>
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<tr>
<td>Czechia</td>
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<td>33%</td>
<td>1%</td>
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<td>19%</td>
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<td>27%</td>
<td>29%</td>
<td>1%</td>
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<td>23%</td>
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<td>22%</td>
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<td>Belgium</td>
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<td>Israel</td>
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<td>Turkey</td>
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<td>33%</td>
<td>1%</td>
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<td>2%</td>
<td>54%</td>
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<td>2%</td>
<td>48%</td>
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<td>11%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1%</td>
<td>31%</td>
<td>21%</td>
<td>3%</td>
<td>4%</td>
<td>23%</td>
<td>18%</td>
</tr>
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<td>Sweden</td>
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<td>9%</td>
</tr>
<tr>
<td>France</td>
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<td>10%</td>
<td>9%</td>
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<td>21%</td>
<td>12%</td>
<td>16%</td>
<td>9%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Moreover, when comparing the search queries of all 7 destinations per country of origin in the period 2018-2023, we result in Table 6.1, which is also visualized in Figure 6.6. According to this, several interesting conclusions can be derived for some of the main markets Halkidiki is focusing, like:

- Tourists from Bulgaria are mostly interested in Halkidiki, then in Corfu and significantly less in Rhodes. They do not show particular interest in other islands.

- Tourists from Serbia are mostly interested in Corfu and Rhodes and then in Halkidiki or Zakynthos.
• Interest from Austria and Germany is focused mainly in Rhodes, Kos and Corfu, and much less in the other destinations of the sample.

`Figure 6.6: Bar Chart of top-10 Halkidiki Search queries 2018-2023`

### 6.3.3 Halkidiki related queries

By Google Trends we can derive also other queries that users interested in ‘Halkidiki’ term, made throughout the period of 2018-2023. The most popular search queries (in the relative scale, as is the case in Google Trends) are shown in Figure 6.7.

According to this Figure and excluding searches in Greek:

• The most popular term is ‘Chalkidiki’ with CH (score: 100), only followed far behind by the term ‘Halkidiki’ with H (score: 47).

• Other terms that ‘Halkidiki’ is related with are: ‘халкидики’ (in Cyrillic), ‘Chalkidiki hotel’, ‘Chalkidiki Griechenland” (German), ‘Halkidiki Wetter’ (German)

• Much less are the searches for the specific touristic peninsulas of Halkidiki: ‘Kassandra’ and ‘Sithonia’ (score: 6 for both).
Referring to the first bullet above, about the use of terms ‘Chalkidiki’ and ‘Halkidiki’, Google's search algorithms are quite sophisticated and can recognize and associate related terms and alternate spellings. Google tends to treat similar terms or alternate spellings as the same for the purpose of search results, especially when the terms are closely related, like "Halkidiki" and "Chalkidiki."

Yet, this is not guaranteed when searching by search engines other than Google. Also, definitely this is not the case when in social media.

An evaluation of the use of the terms during the previous years, resulted in Figure 6.8, that shows how ‘Chalkidiki’ dominates over ‘Halkidiki’. Of course, this is mostly affected from searches in Greece, where 63% are made with the term ‘Chalkidiki’ (see Figure 6.9).
Figure 6.8: Chalkidiki and Halkidiki Search queries 2019-2023

Figure 6.9: Chalkidiki and Halkidiki Search queries per Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Chalkidiki (Worldwide)</th>
<th>Halkidiki (Worldwide)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CZECHIA</td>
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<td>VIETNAM</td>
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</tr>
<tr>
<td>ARMENIA</td>
<td>100%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Nevertheless, by Figure 6.9 we can see the differences in searches in different areas of the world, like:

- Balkan countries vs Central Europe countries (Germany, Austria, Netherlands, Switzerland)
- United states vs Canada, United Kingdom or Australia.

The differences observed in Google Trends, especially across different countries of origin, reflect variations in search behavior, regional preferences, or other factors that have to be considered and evaluated by the DMOs responsible for the promotion of the destination.

It does not necessarily indicate that the tourism brand of Halkidiki/Chalkidiki is weak, since the destination brand is built upon a range of factors including visitor numbers, visitor satisfaction, reviews, tourism revenue, and the destination's overall reputation.
7. CONCLUSIONS AND PROPOSALS

7.1 Conclusions

Destination marketing has evolved into a pivotal aspect of the tourism industry, with destinations themselves considered the primary focus for tourism activities. Establishing Destination Marketing Organizations (DMOs) has become crucial for enhancing competitiveness and attracting visitors to unique locales worldwide.

Traditional advertising methods no longer effectively captivate tourists. Instead, smart, interactive, and personalized communication dominates, facilitated by digital marketing. Social media adoption by DMOs aligns with changing traveler behavior, with influencer engagement emerging as a powerful promotional strategy.

In the realm of destination branding, employing new media strategically is crucial. Holistic communication across various platforms and storytelling techniques is essential for effective brand awareness and lasting recall. Greece, ranking among the top global tourism brands, heavily relies on its tourism sector, notably contributing to its GDP through various touristic products like 'Sun & Beach', 'Nautical Tourism', 'Cultural & Religious Tourism', and 'City Breaks'.

The Greek National Tourism Organization’s 'VisitGreece' digital framework serves as a pivotal promotional channel, leveraging major social media platforms and innovative mediums like Viber, providing a broad digital footprint for Greek tourism. Embracing evolving technologies such as virtual reality and artificial intelligence remains crucial for enhancing visitor engagement and delivering immersive experiences.

Halkidiki however, despite its natural and cultural assets, hasn't fully harnessed its potential in the competitive international tourism landscape. Although accounting for 5% of Greek overnight stays, it lags behind other regions like Crete and Ionian Islands. Its tourism product primarily revolves around 'Sun & Beach', with efforts to develop 'Yachting', 'Cultural & Religious', and 'Gastronomy' tourism in recent years. Halkidiki faces challenges such as tourism seasonality, infrastructure issues, and limited public transportation, affecting the overall tourist experience.
While the Halkidiki Tourism Organization (HTO) maintains a digital presence, its efforts lack influencer engagement and thematic group participation. Comparatively, Halkidiki ranks least in popularity among Google Trends data compared to six similar Greek destinations. While Balkan countries and Cyprus exhibit interest, penetrating larger markets like Germany and the UK remains untapped, signaling unutilized potential for digital promotion and broader market interest creation.

7.2 Limitations of the current study

Halkidiki is a destination which has not been included in many academic studies in the field of tourism so far (Mavragani et al. (2019)). This fact represents a limitation for all relative studies, including the one in hand, since there do not exist solid and cross-checked research outcomes to establish the foundations of further insights.

Moreover, there is a lack of detailed statistical data as well as comparisons and correlations of digital promotion efforts alongside the resulted user engagement and/or resulted overnight stays.

7.3 Recommendations for future research

In future research, especially regarding Halkidiki and its digital destination marketing efforts, we believe that scientific literature should focus on:

- Conducting a comprehensive analysis of user-generated content on various digital platforms related to Halkidiki. Examine the role of UGC in shaping destination perceptions and influencing travel decisions and explore strategies to encourage and leverage UGC for effective destination marketing.

- Exploring the use of advanced data analytics techniques to measure the performance and effectiveness of digital marketing initiatives for Halkidiki. Analyze key performance indicators (KPIs) and develop models for assessing the return on investment (ROI) of various digital marketing campaigns.
• Developing long-term digital marketing strategies for Halkidiki, considering the evolving digital landscape, changing consumer preferences, and technological advancements to outline sustainable approaches that can contribute to the destination's increased growth and competitiveness over time.
8. REFERENCES


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