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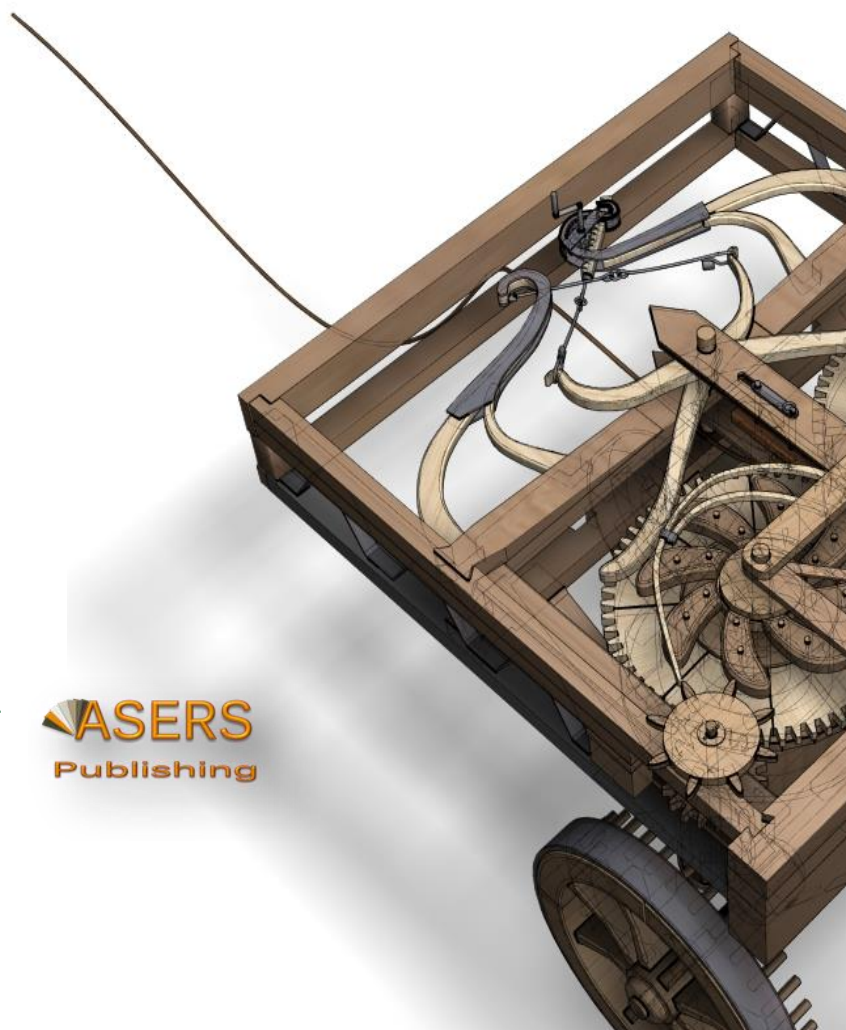
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Strategic Analysis of Mediterranean Island Destinations: The Case of Corfu

Georgios KONTOGEORGIS

Ionian University, Greece

giorgos.kontogeorgis@ionio.gr

Christos LIVAS

University of Patras, Greece

clivas@upatras.gr

Nansy KARALI

University of Piraeus, Greece

karalin@unipi.gr

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Abstract

Apart from having a long tourism tradition, due to its geographic location and predominantly pleasant climatic conditions, Greece has primarily relied on tourism to recover from its prolonged economic hardships. Consequently, the present study aims at conducting a strategic analysis of Corfu, an important tourist destination located in the Ionian Sea, with the purpose of suggesting targeted interventions regarding the island's tourism product and providing directions for sustainable tourism development. Secondary data analysis and results from a survey of 334 tourists indicated several strengths, weaknesses, opportunities, and threats concerning Corfu's tourism sector. This information reveals a number of ways to improve Corfu's overall tourism product and develop a sustainable strategy for the Corfiot tourism industry. In view of rising environmental and socioeconomic challenges, a comprehensive tourism strategy ought to simultaneously enhance Corfu's competitive position, improve residents' welfare and safeguard the island's scarce natural resources.

Keywords: strategic analysis; SWOT; tourism planning; tourism product; tourism model; Corfu.

JEL Classification: Z32; Z33.

Introduction

Greece has a long tourism tradition, particularly due to its rich cultural heritage (Buhalis 2001), geographic location and pleasant climatic conditions (Mylonopoulos, Moira and Kakaroucha 2022). For mostly the same reasons, tourism has been a notably significant economic activity for most traditional Mediterranean destinations (Vitouladiti 2014), including Spain, France, Italy and Turkey (McKinsey & Company 2011). However, contrary to several comparable tourist destinations, tourism has been Greece's overarching priority in view of its path to socioeconomic recovery from the prolonged recession. The country's overreliance on tourism is evinced by fundamental macroeconomic indicators. In 2018, tourism was estimated to directly account for approximately 21,6% of the country's gross domestic product (GDP) and 16,7% of total employment (SETE 2019). Given the sensitivity of tourism and travel to global crises caused by economic downturns, safety concerns or contagious diseases, the recent Covid-19 pandemic brought about a substantial economic impact on Greece. Because of its excessive dependence on tourism, Greece has been disproportionately affected by the global pandemic and experienced a real GDP contraction of approximately 8,2% in 2020 (European Commission 2021). Although it is uncertain whether and when tourist activity will fully recover, the Greek tourism industry has been also expected

to face adverse economic impacts due to the pandemic's negative income effects in partner countries, disruptions in international travel and tourists' perceived risk (European Commission 2020; UNWTO 2020).

With respect to its competitive model, Greece has almost exclusively based its tourism development on the 'sun, sea and sand' (*i.e.*, 'Triple S') model (Sotiriadis and Varvaressos 2015). On the surface, this strategic orientation is instinctively driven by an attempt to exploit certain characteristics of the destination, that are readily available and in abundance. Among other, tourists visit Mediterranean destinations because of their temperate climate and relatively dry summers (Rutty and Scott 2010), picturesque landscapes, welcoming seas, local lifestyle and heritage (Amelung and Viner 2006). However, despite its popularity, reliance on the Triple S model has several pitfalls. The plethora of destinations that highlight their sun and seas to attract tourists hampers their ability to achieve meaningful and sustainable differentiation from competition (Sotiriadis and Varvaressos 2015). Although it requires minimal effort from tourism planners, marketers and practitioners, as it is primarily based on the exploitation of natural resources that are readily available in the respective destinations, the Triple S approach increases vulnerability to price-based competition from emerging destinations. Furthermore, while the minimal effort required to employ Triple S allows tourism providers to lower their costs, it also hinders their potential to achieve greater and more stable revenue streams. As a result, tourism providers in Triple S destinations may often experience intense seasonality in tourist arrivals (Sotiriadis and Varvaressos 2015) and attract large numbers of price-conscious tourists.

Consistent with Greece's overall model of tourism development, the Ionian Islands region has primarily based its tourism activity on its readily available resources and characteristics (Mylonopoulos, Moira, and Kakaroucha 2022). The region's advantageous geographic location, natural resources, numerous attractions and unique cultural heritage, have contributed to its emergence as a leading destination within Greece (Enterprise Greece 2017). Because, over the years, Corfu was under Greek, Venetian, British and French rule, it has developed a distinctive Corfiot style (Tsoumanis, Kavvadia, and Oikonomou 2014). Due to its advantageous features, since the early 1970s, Corfu has attracted considerable long-term investments and experienced substantial tourism growth (Dritsas 1998).

In view of the previous, the present study aims at conducting a strategic analysis of Corfu, as a tourist destination, with the purpose of suggesting targeted interventions regarding the island's tourism product and providing directions for sustainable tourism development. Factors such as the abundance of existing and emerging Mediterranean destinations that compete on a 'Triple S' basis and Corfu's reliance on tourism, accentuate the need to carefully redesign Corfu's tourism product, with the intention of achieving meaningful differentiation from competition, enabling sustainable growth and overcoming environmental adversity. The new reality facing Mediterranean destinations, which is shaped by novel threats and increased competitive pressures, necessitates strategic adaptation, evolution of tourism products and provision of better value to tourists, travelers and resident populations (Mouratidis 2021). The level of economic prosperity and societal welfare in Corfu, as well as in other comparable Mediterranean destinations, depends to a great extent, on the ability of tourism planners, policy makers and providers to take advantage of destination strengths, exploit contextual opportunities and overcome adverse developments.

1. Literature Review

1.1 Strategic Analysis of Tourist Destinations

Every destination possesses an assortment of tangible and intangible characteristics, which partly determine its ability to attract travelers and tourists. A destination's tourism product can be conceptualized from both a demand and supply perspective. Demand-based approaches view tourism products as a selection of factors that are available to individuals visiting a destination (Della Corte 2012; Franch, Martini, and Tommasini 2003). From a tourism supply perspective, which is adopted in the present study, a destination's tourism product consists of attractions, facilities, accessibility, images and price perceptions (Middleton *et. al.* 2009).

The process of strategic analysis involves the ongoing evaluation of internal characteristics and external forces, in an effort to implement appropriate strategies and achieve objectives (Gurel and Tat 2017). As a form of strategic analysis, the analysis of strengths, weaknesses, opportunities and threats (*i.e.*, 'SWOT Analysis') has been considered to be a useful method for enhancing the competitiveness of tourist destinations (Buhalis 2001; Goranczewski and Puciato 2011). By enabling the simultaneous examination of internal characteristics (*i.e.*, strengths and weaknesses) and external forces (*i.e.*, opportunities and threats), it allows for a straightforward and cohesive evaluation of the competitive positions occupied by alternative destinations. The holistic perspective of SWOT Analysis is demonstrated by the fact that it incorporates aspects of critical theories of strategic analysis, such as Porter's five forces, the Delphi model and Norton's Balanced Scorecard (Gurel and Tat 2017).

1.2 The Case of Corfu

To enable a complete strategic analysis of the selected island destination, the present section provides a concise background of the case at hand with use of publicly available secondary data, published reports and prior studies.

1.2.1 Historic Development

Due to its key geographic location, between Italy and Greece, Corfu has been a crossroad of different cultures and a place of international economic exchange since antiquity (Mylonopoulos, Moira, and Kakaroucha 2022). The island appears in many historical documents in the context of significant socioeconomic, cultural and political developments. International recognition of Corfu's attractiveness as a tourist destination begun in the 18th century, and due to a number of factors, Corfu has become one of the most developed tourist destinations in Greece. Well-known attractions, such as the Achilleion, attract numerous visitors annually and contribute to Corfu's image and international reputation. Over the years, tourism development has been driven by noteworthy investments, in the Corfiot tourism industry. For instance, Club Med's investment in 1952 significantly impacted Corfu's tourism development as it was one of the first long-term investments in the Greek tourism sector (Dritsas 1998). Although certain areas of Corfu, such as the village of Benitses, emerged as popular destinations during the early stages of the island's tourism development in the 1970s, most parts of the island are now contributing to Corfu's image.

1.2.2 Aspects of Tourist Demand and Supply

Since 2012 and up until the outbreak of Covid-19, Greece experienced a steady increase in tourist demand (PwC 2018). Due to a variety of sociocultural, historical, promotional and geographical factors, approximately 35% of tourist demand has been estimated to originate primarily from four European countries, while arrivals are characterized by a seasonal peak during the summer (PwC 2018). The supply side of Corfu's tourism industry is based on an assortment of important sights, services provided and aspects of its image. A few of the island's main attractions include 'Pontikonisi' (*i.e.*, a small uninhabitable island), mount 'Pantokrator' (*i.e.*, the highest spot in Corfu offering a unique view of the Albanian coastline, neighboring islands and mainland Greece) and the 'Old Town'. The latter is an amalgam of different European cultures, as the island has been under Venetian, French, English and Greek rule over its history. An overview of some of the island's most popular attractions is provided in Table 1. A qualitative examination of users' comments on TripAdvisor (2022), regarding each location, allows for the identification of positive and negative attributes according to the travelers' point of view. Thus, although most tourists recognize the natural beauty, historical and cultural importance of the island's main attractions, they are concerned about infrastructure (*e.g.*, parking, accessibility and maintenance), cleanliness and cost.

Table 1. Overview of Some Popular Sights in Corfu

Sights	TripAdvisor Score (# Reviews)	Popular Mentions by Visitors
Old Fortress	4,5 (3.312)	Worth the climb, well worth a visit, light house, fantastic views, entrance fee , interesting history, euros , barracks, venetians
Old Town	4,5 (3.172)	Narrow streets, cafes and restaurants, cruise ship, architecture, souvenirs, fort, rubbish .
Palaiokastritsa Monastery	4,5 (1.235)	Light a candle, worth a visit, walk up, viewpoint, tranquility.
Pantokrator	4,5 (778)	Highest point, hairpin bends , small monastery, winding road , hire car , well worth the effort, mainland Greece.
Church of Agios Spyridon	4,5 (747)	Bell tower, holy place, light candles, beautiful ceiling, icons, sarcophagus, religious, prayer, protector, dome.
Pontikonisi	4,5 (688)	Boat trip, Corfu airport, old church, well worth a visit, peacocks, chapel, euros , photos, boatman.
Achilleion	4,0 (4.641)	Beautiful palace, Greek mythology, well worth a visit, James Bond, entrance fee , Kaiser Wilhelm, lovely place, Achilles, statues, empress, Austria, history, hero, euros , restoration works
Canal D' Amour	4,0 (4.434)	Beautiful place, on the rocks, natural beauty, the cliff, stunning views, worth a visit, small beach, nice walk, beautiful beach, bars and restaurants, cave, clay.
Archaeological Museum of Corfu	3,0 (112)	Worth a visit, informative, revamped, small , closed .

Note: Potentially negative mentions appear in bold.

Source: TripAdvisor (last accessed on 17 July 2022)

Unlike most islands in the Aegean Sea, Ionian Islands, including Corfu, have a rich natural environment and are densely vegetated. However, Corfu has established its competitive advantage in terms of its numerous beaches and clear waters. According to their own preferences, travelers can visit sandy or pebble beaches, that are quiet or organized (Insete 2015). Regarding accommodation, tourists have the option to choose among a great number of hotels, rooms, camping sites or vacation rentals. In recent years, there has been an effort to improve the quality of accommodation services, through the modernization of existing facilities and creation of additional units (Giovanni and Calò 2022). Apart from enjoying the sun and beaches of Corfu, tourists and visitors can shop in the commercial streets of Corfu's city center, engage in various athletic activities (e.g., water sports, cricket, golf, tennis and horseback riding), enjoy the vibrant nightlife and visit the Casino.

With respect to tourist destinations, the element of accessibility incorporates existing infrastructure (e.g., airports, ports and road network) and means of public transport (Middleton *et al.* 2009). Corfu is easily accessible to domestic and international visitors by air and sea, and while on the island, tourists can use public transport, tourist buses and taxis. The cost of travel, accommodation and services offered constitute the 'price' aspect of a destination's tourism product (Middleton *et al.* 2009). Given the variety of available accommodation types, services and travel options, tourists can customize their experience according to their disposable income and preferred service quality. However, irrespective of personal choice and because of the intense seasonality of tourism demand in Corfu, tourists face higher costs on average during the summer season.

Every physical element of a destination's tourism product contributes to its image. Existing literature suggests that destination image derives from individuals' views, impressions and ideas about a destination (Kamenidou *et al.* 2013; Crompton 1979) and significantly affects destination choice among tourists (Baloglu and McCleary 1999). Although Corfu has achieved international recognition and heavily relies on its reputation to attract travelers (Tsoumanis 2009), its image needs to be refined and protected. Similar to tourists' perceptions about a number of other destinations in Greece, certain parts of Corfu, such as Kavos, are often perceived as an ideal location for tourists to engage in disruptive behaviors. Apart from disturbing residents and hindering other tourists' experiences, such phenomena often produce negative publicity and impair Corfu's image in Greece and abroad.

Nevertheless, Corfu's problems go well beyond the disturbances and negative publicity produced by some antisocial tourists behaving disorderly. The Triple S model, which best describes the mass tourism approach implemented in most Greek tourist destinations, is at least partly responsible for attracting some 'unwanted tourism' and intensifying seasonality of tourist activity. Data for the 2007-2019 period suggest that the Ionian region has experienced a large increase in tourist pressure on its territory (Ruggieri and Calò 2022). The emphasis on exploitation of readily available natural resources has also contributed to the lack of initiatives and infrastructures required to develop alternative forms of tourism all over Greece. Overall, any attempt to reorganize and reinvent Corfu's tourism industry has to explore solutions to ongoing issues, such as the lack of appropriate urban planning, marine pollution, poor road network and deterioration of cultural identity (Vitouladiti 2014).

2. Methodology

Acknowledging that the image of a tourist destination is a crucial factor influencing tourists' choice (Baloglu and McCleary 1999) and given the complexity of strategic analysis, the present study attempted to complement secondary information and prior research with primary data collection. Primary data were collected via a brief structured questionnaire that was administered to tourists visiting Corfu. Participants were asked to evaluate certain aspects of Corfu's tourism product (11 item, 5-point Likert-type) and indicate the problems they perceived as more relevant to their experience on the island (6 dichotomous variables). The questions asked were based on existing literature and publicly available reports (*i.e.*, Middleton *et al.* 2009 for the different aspects of Corfu's tourism product and Vitouladiti 2014 for the perceived problems of Corfu).

The final study sample consisted of 334 foreign individuals who were recruited at Corfu's airport from August 15, 2019, to October 15, 2019. Because the sampling method employed was a form of convenience sampling and in order to enhance representativeness of the sample, the survey covered a period of low, medium and high tourist activity. For the same reason, there was an effort to achieve a proportion of research participants per country of origin analogous to that of tourists visiting Corfu.

3. Results

3.1 Tourists' Evaluation of Corfu's Tourism Product

With respect to Corfu's tourism product (Table 2), approximately two out of three participants were satisfied with the island's tourist attractions (63,67% and 61,98% respectively) and cultural tradition (66,76%). Considering that

nearly 4 out of 5 participants (80,54%) were satisfied with Corfu's beaches, it is reasonable to assume that tourists acknowledge the quality of the island's cultural heritage and natural resources. On the other hand, although accessibility of said tourist attractions and of the island by air was deemed satisfactory by the majority of participants (63,77% and 70,36% respectively), only 1 out of 2 participants (49,10%) expressed their satisfaction with Corfu's accessibility by sea. The latter, despite indicating a potential weakness, may be also due to the participants' lack of experience with this travel option, as indicated by the relatively high percentage of the 'no answer' category (11,08%).

Participants were also overwhelmingly satisfied with the accommodation (85,92%) and services (86,82%) offered on the island. Interestingly, despite their traditional reliance on the Triple S model of 'minimal effort', Corfu's tourism providers appear to be delivering services and experiences that meet their customers' requirements and expectations. Tourists' experiences also seem to benefit from engaging with locals and feeling welcome on the island (86,23%). The only aspect of Corfu's tourism product for which the minority of participants was satisfied, was that of 'price' (37,73%). Given that price refers to the sum of what it costs for travel, accommodation and participation in a selected range of facilities and services (Middleton *et al.* 2009), tourists were not satisfied with what they had to pay in relation to their experience at the destination, prior expectations and/or comparable offers.

Table 2. Tourists' Evaluations of Corfu's Tourism Product Elements

Participants' satisfaction with:	Median value	% 'agree' & 'completely agree'	No answer
Importance of tourist attractions	4,00	67,36%	0,30%
Number of tourist attractions	4,00	61,98%	0,30%
Cultural tradition	4,00	66,76%	1,50%
Beaches	5,00	80,54%	1,20%
Air connection	4,00	70,36%	2,10%
Sea connection	4,00	49,10%	11,08%
Accessibility of tourist attractions	4,00	63,77%	1,80%
Accommodation	4,00	85,92%	2,69%
Services	4,00	86,82%	1,20%
Price level	3,00	37,73%	2,10%
Locals' friendliness	5,00	86,23%	6,29%

3.2 Tourists' Perceptions of Corfu's Problems

Regarding tourists' perceived problems of Corfu (Table 3), approximately 1 out of 2 participants indicated the road network (53,29%) and the lack of cleanliness (49,10%) across the island. It is interesting to note that the problematic road network and lack of public hygiene may be related to the perceived problems of traffic congestion (21,56%) and environmental protection (38,02%) respectively. Finally, the least reported problems were those relating to water supply (14,37%) and tourist information (9,58%).

Table 3. Perceived Problems of Corfu

Problem	%
Road network	53,29%
Cleanliness	49,10%
Environmental protection	38,02%
Traffic	21,56%
Water supply	14,37%
Provision of tourist information	9,58%
No answer	9,88%

4. SWOT Analysis

The SWOT analysis of Corfu as a tourist destination, conducted in this section, is based on the previously presented literature and secondary information, as well as on the preceding primary data analysis. Through the combination of diverse information sources, the study attempts to highlight the most significant strategic considerations of the case at hand.

4.1 Internal Characteristics: Corfu's Strengths and Weaknesses

Regarding Corfu's internal characteristics (Table 4), primary data analysis indicated that most tourists are satisfied with the island's cultural heritage and natural resources, as well as with the accommodation and services provided by tourism providers. Although results about culture and natural resources were anticipated, results about accommodation and services were surprising and may be attributable to significant efforts observed in recent years. Tourists' experiences on the island are also enhanced by Corfiot hospitality, as locals make visitors feel welcomed and appreciated. Lastly, an important strategic strength of Corfu originates from its strategic maritime location between Greece and Italy (Enterprise Greece 2017), which places it closer to the European mainland and facilitates its accessibility.

On the other hand, every weakness reported by tourists or extracted from readily available information appears to be unrelated to the destination's available natural resources and cultural heritage. The poor road infrastructure and traffic congestion, which hinder accessibility of tourist attractions and undermine the relaxing holiday experiences of tourists respectively, are likely the result of inappropriate planning from the local authorities and lack of financial resources. Additionally, contrary to global trends, Corfu seems to underperform with respect to environmental sustainability. The absence of measures to protect the natural environment also burdens the local authorities and puts scarce natural resources of the island at risk. In the same context, authorities do not seem to ensure public hygiene across the island. Apart from hampering tourists' experiences, such deficiencies are accentuated in view of the Covid-19 pandemic and compromise the health of visitors and residents.

An important weakness identified by the primary data analysis was related to the tourists' perceived cost at the destination. Given the complexity and volume of the factors affecting overall price perceptions of a destination (e.g., travel, accommodation, activities, dining, expectations, prior experience, word of mouth and comparable destinations), as well as the emergence of competing low-cost tourism destinations, Corfu's tourism planners and providers should aim at improving the value equation of their offering.

Table 4. Strengths and Weaknesses

Strengths
Natural resources
Cultural heritage
Accommodation and service quality
Corfiot hospitality
Geographic location
Weaknesses
Road infrastructure and traffic congestion
Environmental sustainability and public hygiene
Perceived cost

4.2 Forces of the External Environment

Notwithstanding the characteristics of a tourist destination, its performance is greatly affected by forces of its external environment (Table 5). Such factors can be largely uncontrolled by tourism planners and destination management organizations, and present imminent threats or opportunities. To negate threats and/or exploit opportunities, destinations ought to employ their strengths and adjust by developing novel capabilities.

The operation of seaplanes in Corfu could enrich and upgrade the island's tourist product, by enabling tourists to visit nearby tourist destinations. Furthermore, exploitation of national and European funding programs, such as ESPA (*i.e.*, Partnership Agreement for the Development Framework in Greece), could facilitate the upgrading of tourism infrastructure on the island. Aegean Airline's decision to upgrade and operate more flights at Corfu airport as well as the ferry connection between Corfu and Italy during the summer months, may increase the number of incoming tourists. To benefit from the projected increase in tourism demand, Corfu ought to enhance its tourism carrying capacity in sustainable ways. Despite the potentially positive factors identified, those responsible with tourism planning on the island should exploit the island's strengths in order to negate the adverse effects of economic contraction and potentially recurring travel restrictions, 'Brexit' and intensifying competitive pressures.

Table 5. Opportunities and Threats

Opportunities
The new legal framework for the operation of waterways.
Funding Programs (e.g., ESPA).
The new air base of Aegean Airlines in Corfu.
The ferry connection between Corfu and Italy during the summer.
Threats
Travel restrictions and economic downturn due to Covid-19
'Brexit'
Emergence of competitive tourist destinations in Greece and abroad

Conclusion

The information deriving from SWOT analyses can be used for developing strategic directions for tourism organizations and businesses (Goranczewski and Puciato 2011). Along with the survey data, SWOT findings may be utilized for improving Corfu's tourism product. The need for strategic planning to facilitate sustainable growth has been highlighted by existing literature (Sotiriadis and Varvaressos 2015) and appears to persist. The dynamism of the global macro environment further pinpoints the requirement for immediate and long-term tourism strategies (Vladi 2014). Considering the five main components of the tourism product (Middleton *et al.* 2009), those responsible with tourism planning are advised to improve accessibility of attractions on the island (*i.e.*, road network), upgrade sights' websites and use new technologies in sightseeing tours, so as to resonate with modern consumers and augment perceived value of the offering. Problems associated with the road network of Corfu have been highlighted in the present study's survey. Therefore, the road network ought to be upgraded, particularly with respect to roads leading to Corfu's primary attractions. An upgrade of the sights' websites could be directed towards the electronic issuing of tickets and acquiring rich information about the point of interest. The use of advanced digital technology could be also employed to provide virtual tours to existing and potential visitors.

Regarding the accessibility aspect, perceived service quality could be enhanced by the creation of sidewalks for people with special needs and the improvement of International Airport of Corfu's infrastructure to better serve visitors particularly during high season. In view of existing traffic issues facing Corfu, the creation of parking areas is hypothesized to be a significant contribution to mitigate problems. The operation of waterways and the improvement of the Port's infrastructure are also factors that could potentially enhance perceived accessibility of the island and attract more cruise ships.

There is also potential to augment the value of services provided on the island with initiatives such as the creation of tourist information points, where visitors can be provided with all available information about places of interest and available options. Tourism providers and organizations may also seek to obtain international certifications for the products and services they provide, with an aim to further improve hospitality and accommodation services.

Corfu's image is expected to significantly benefit from security, which may be cultivated by police surveillance in places of tourist interest and increased tourist activity. It could also be beneficial to introduce a general body or authority responsible for managing customer or tourist complaints. Because destinations are largely their people, individuals employed in the tourism industry should receive professional training in order to acquire critical skills and abilities required by contemporary consumers. Augmenting the island's image to include alternative forms of tourism may also provide partial solutions to increased seasonality. Such an approach would, indicatively, necessitate the organization of gastronomic festivals and music events, operating meditation centers and marking trails in outdoor areas. Similar initiatives have been introduced in certain parts of northern Corfu, with great success (Christou 2017).

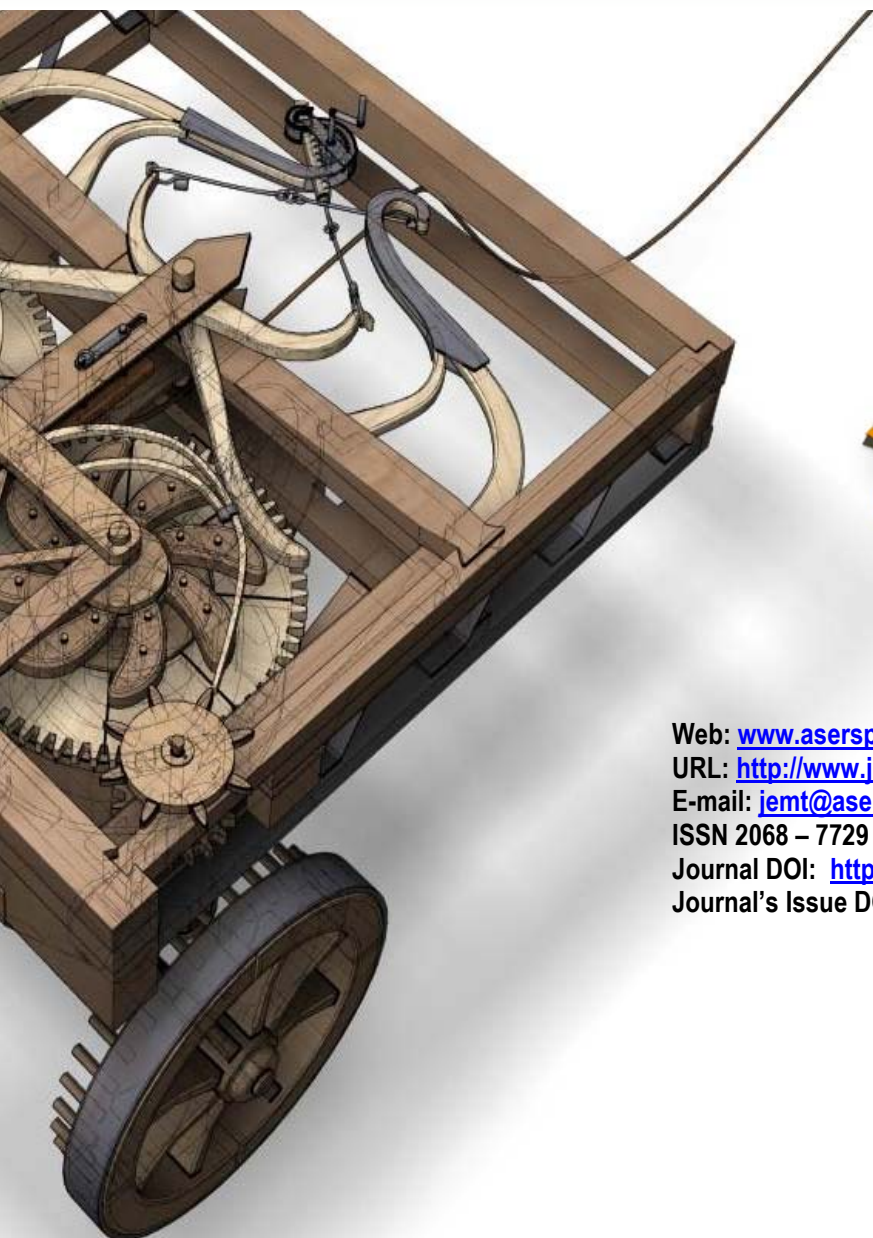
Overall, it should be noted that all the above suggestions may increase the perceived value of Corfu as a tourist destination, and therefore improve the value equation of the island's tourism product. However, in the context of improving Corfu's competitive position and residents' welfare, those responsible with decision-making ought to ensure the implementation of sustainable strategies and tactics. Environmental and socioeconomic sustainability, albeit crucial for establishing lasting competitive advantage, is also necessary in view of novel challenges on a global level.

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