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Open Journal of Animation, Film and Interactive Media in Education and Culture [AFIMinEC]

Vol 5, No 1 (2024)

main issue

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doi: 10.12681/afiinmec.35366

To cite this article:

Zenelis, P., & Vasileiou, M. (2024). The increase of International Audiovisual Productions in Greece - Impact on Tourism and the Greek Economy. *Open Journal of Animation, Film and Interactive Media in Education and Culture [AFIMinEC]*, *5*(1). https://doi.org/10.12681/afiinmec.35366

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The increase of International Audiovisual Productions in Greece: Impact on Tourism and the Greek Economy

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Abstract

In this paper is being examined the growth of international audiovisual productions being partially or entirely developed in Greece and the central role of the Greek public authorities in assisting this tourism-generating industry grow even more. This study tries to pinpoint the most common impediments that the audiovisual media industry confronts when deciding to select Greece as the location for an audiovisual project. Sustainable practices that are proposed aim to further attract and develop analogous initiatives in the Greek territory. Some of the most important benefits of the realization of such projects for the local communities are pointed out such as the increase in income, the creation of new jobs and the general boost of the local economy. The impact of audiovisual productions on tourism is also related to the "film effect" and the contributory role of audiovisual productions to promote a location's attractions. This paper focuses on the international audiovisual productions industry's expansion with an emphasis on the positive effects that the cultural-economic audiovisual productions have in strengthening both local economies and the Greek audiovisual sector.

Keywords: cash rebate, international audiovisual productions, local economies, revenue generation, tourism

1. Introduction

Greece's rich culture and long history is a combination that attracts high volumes of visitors making these characteristics the main reasons behind the considerable growth of international audiovisual productions filmed in Greece. This trend has been supported by the country's diverse and well-preserved heritage, its experienced and skilled audiovisual professionals and, since 2018, its competitive economic incentives. The impact of the increase of international audiovisual production in Greece on the country's tourism sector and economy in general, remains largely unchartered. This paper seeks to evaluate the positive effects that seem to be generated by the activity of the audiovisual producers both on the Greek tourism industry and the Greek economy in general given the contribution of the tourism

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industry to the Greek GDP. The motivation behind this work was the related increasing interest of the Greek government which has invested in the development of the "Cash Rebate", the "Tax Relief" and the "Film Offices" programmes, to assess the multiplier effects both in the Greek economy in general and in the Greek audiovisual sector in particular. The aim of this paper is to provide constructive findings to those involved in policy making in order to further support the growth of the robust audiovisual production industry in Greece in order to produce positive results for the country both economically and culturally.

2. Objectives of the study and research questions

The main purpose of this study is to try to evaluate the increase of international audiovisual productions that selected Greece as the filming location for their films and TV-series together with the positive economic effects that this trend has on the local economies. It is also being examined the role of the Greek public authorities in supporting and promoting the audiovisual industry within the Greek boundaries. In addition this paper tries to identify the challenges faced by the audiovisual industry in Greece and evaluates potential solutions to overcome them. The identification and evaluation of the advantages and disadvantages of the existing framework as well as the intended further increase in the audiovisual activity is considered important as the most important goal is to enable the Greek tourism industry to integrate into its promotional activities the positive results that spring from the international audiovisual productions happening in Greece in order to give a further boost to the Greek tourism product. Through the presentation of the positive results of the sector in question in Greece and the formulation of policy proposals, a satisfactory argument for the need for further support and stimulation of the audiovisual industry in Greece emerges.

Tourism industry is considered to be a sector that is significantly affected by the growth of international audiovisual activity. This positive consequence is translated into unemployment reduction concerning jobs directly or indirectly related to the tourism sector and, as a result, into a moderate acceleration of the local economic activity.

Despite the positive interactivity described above, the Greek audiovisual sector faces several challenges in terms of attracting and supporting international audiovisual productions' activity. The Greek government has developed initiatives that mainly focus on providing financial and tax incentives to companies, Greek or foreign, that choose to film part or all of the production in Greece. Greece's rich historical and cultural background seems to be one of the most important reasons for attracting international producers, a fact that challenges the Greek authorities to continue to promote these aspects of the country if they want to further strengthen this growing trend.

The launch of international audiovisual productions in Greece positively affected the local audiovisual industry as, in addition to participation in secondary and auxiliary tasks, it created new opportunities for cooperation and training for domestic professionals while new distribution channels for Greek productions were introduced.

Finally, the perception of the Greek population towards international audiovisual productions in Greece has been generally positive with the majority of the population recognizing the positive impact that these productions have on the country's image and reputation as well as broadening the dynamics of the development of the two interrelated industries, tourism and audiovisual productions. However, it would be important the concerns or negatives perceptions that may come up to be addressed so

as to avoid any impediments that may hold back further development of the industry in question.

Through this paper we make a first step towards bridging the gap in the literature concerning updated data and the theoretical framework of the interlinkage between Greek tourism industry and international audiovisual productions.

3. Overview of international audiovisual productions

The evolution of the technology used in modern productions has undoubtedly created a total different and novel landscape for the overall production of high quality audiovisual content, content that significantly influences several other aspects of everyday life such as education and culture (Butler, 1990; UNWTO, 2018).

The evolution of the audiovisual industry has significantly improved the ease of access for a vast audience to audiovisual content of diverse cultures, origins or languages (UNWTO, 2018). Online platforms such as Netflix and YouTube have made easier and economical the distribution of content globally (Blackburn, et al, 2019). This has also boosted the development of a more inclusive and diverse media landscape and the cooperation between international production companies (Andersen, 1996; Hoskins et al. 1997; Wayne, 2002; Jäckel, 2003; Cucco, 2018).

As far as the content is concerned, today's international audiovisual productions are more sophisticated and diverse, reflecting the modern expectations of global audiences (Mayer et al., 2009; Connell, 2012). The contemporary trend concerning the audiovisual content is expressed through a rise in the popularity of dramas and films that explore social, cultural and political issues and deal with essential issues such as race, gender and inequality (Olson, 2000; Lavarone, 2020). In addition, there has been an increasing demand for productions of Asian animation films, films that are extremely popular to audiences of all ages and cultures (Jin, 2006).

The impact of international audiovisual productions extends beyond entertainment and culture and into the realm of education and communication (Bathelt, 2005; Gjorgievsk & Trpkova, 2011). Films and documentaries are quite often used as educational tools so as to make more appealing and better understood history, environment or social lectures while audiovisual content is also brought into play when complex issues need to be communicated or wide audiences need to be reached (Miller et al., 2005).

The enriched landscape of international audiovisual productions reflects the changing needs and expectations of audiences and the growth of technology and the digital age (Wong et al., 2007). It provides the potential to create and distribute diverse and inclusive content while positively and significantly impacts education, extroversion and cultural interaction.

4. The impact of audiovisual productions on the economy

The audiovisual industry, in recent years, through the multi million dollars production budgets is considered to be a major player in the international economic activity (Jin, 2006; Wong et al., 2007). This industry includes a wide range of media such as films, television, video games and digital content. At the same time, it significantly affects the economic activity through the creation of jobs, the increase of incomes, the stimulation of local economies and the extroversion of the local cultural product (Kokkosis & Tsartas, 2001; Scott, 2004; Lagos, 2005; UNESCO, 2006; UNCTAD, 2008; Ashley et al., 2007; Varvaresos, 2013).

Job creation is one of the most significant benefits of the audiovisual industry (Christopherson & Rightor, 2009). The production, distribution and promotion of audiovisual productions create employment opportunities for thousands of people worldwide with a stable income in most cases and employment opportunities in the professional field of their choice.

The growth of the audiovisual industry turned out to be a major contributor to unemployment decrease, especially in regions or countries with developing or well established audiovisual production activity (Tannenwald, 2010; Goldsmith, 2015).

Revenue generation is another crucial economic benefit of the audiovisual productions with significantly high receipts of billions of dollars that spring from ticket sales, copyright and licensing fees. In addition, audiovisual production companies contribute to the economy by paying taxes and further stimulating local and national economies (Christopherson & Rightor, 2009).

The stimulation of local economies is another important benefit of audiovisual productions. These productions often take place in specific locations, providing an economic boost to the area (Lukinbeal & Sommerlad, 2022). For instance, the film industry frequently utilizes local businesses and services such as restaurants, hotels, and transportation companies, leading to increased demand and economic growth in the area (Lickorish & Jenkins, 2004).

Audiovisual productions play a significant role in promoting cultural exports. By showcasing the culture and heritage of a specific country, audiovisual productions can increase cultural exports, resulting in increased tourism and growth of cultural industries, further contributing to the economy (Ashworth & Voogd, 1994; Kotler, et al., 1999; Arostegui & Rius-Ulldemolins, 2018).

To sum up, there is a noteworthy impact of the audiovisual activity on the economy by reducing unemployment, augmenting revenue generation, boosting local economies and supporting cultural extroversion. Further research could lead to better understanding of the degree of the economic growth generated by the industry's activity and improved implementations practices so as to maximize yields in the future. With the expected progressive growth of the industry in question these economic benefits will continue to be realized and integrated throughout the local and national economy.

5. The impact of international audiovisual productions on tourism

Tourism industry is considered to be a vital factor of revenue generation for many countries around the world (Zenelis et al., 2011), a role that became far more important after the economic activity decline as a result of the Covid-19 pandemic and the relevant lockdowns that were decided by many governments. In Greece, for decades it is considered to be one of the key factors of economic development while the challenge for the country remains as to become a successful player in the global tourism market and provide solutions to long lasting structural problems within the context of sustainable tourism development (Tsartas, Papatheodorou & Vasileiou, 2014). The promotion of several destinations to potential tourists has a significant impact on their travel decisions, making it a crucial area of research. The constantly evolving modern technologies combined to the increasing appeal of the content of the audiovisual productions, an appeal which due to the extraordinary conditions during the lockdown period increased significantly, resulted in the noteworthy development of new productions such as films, TV series and documentaries. The impact of these productions on tourism is diachronically considered to be an important topic for further research (UNWTO, 2021).

Through the audiovisual productions where shots and/or references to specific locations are included, it is possible to significantly promote the tourism product of a place. (Butler, 1990; Busby & Klug, 2001; Niziol, 2020). The latter is known as the "film effect" where a popular audiovisual project that was filmed and/or includes images and references from a specific geographic area contributes to increasing demand and ultimately visitors to that place. (Tooke & Baker, 1996; Riley, et al., 1998; Iwashita, 2003; Macionis, 2004; Beeton, 2005; Di Cesare, et al., 2009; Roesch, 2009; Croy & Heitmann, 2011). Different types of audiovisual productions affect in a dissimilar way different types of tourists, for example documentaries and travel shows catch the attention of more culturally oriented visitors while action movies and TV series may attract tourists interested in adventure or activities themed holidays (Tooke & Baker, 1996; O´Connor et al., 2008; Connell, 2012).

The image of a destination plays a crucial role in the tourism development of an area. Although the promotion of a destination through an audiovisual production can be significantly enhanced, the planning of relevant initiatives and incentives must be put into action carefully, taking into account the characteristics of a destination, as overpromotion in relation to the existing carrying capacity may have contrary to the desired results in the medium-long term. In addition, the positive presentation of a destination in a popular audiovisual project could contribute positively to the attraction of visitors while an unfortunate or negative presentation of a destination can negatively reverse even the existing tourist volumes of a region (Anholt, 2006; Morgan, et al., 2007).

Audiovisual media can also play a significant role in destination promotion and marketing (Macionis, 2004). Both through the international film festivals and the extroversive activities of public and private administration bodies involved in the tourism product, the use of audiovisual productions could be an excellent means of promoting a destination. Through these projects it is possible to reach a wide audience who, under different circumstances, would not have known or would not have included the destination in question in its travel plans (Hudson & Ritchie, 2005).

Audiovisual industry can have a considerable impact on tourism and be the shaping factor in promoting tourism destinations. These results are not always easy to assess and quantify, since tourist volumes depend mainly and significantly on other factors such as the type of media and the particular characteristics of a destination. Further research could help researchers and decision-makers on how to evaluate the repercussions of audiovisual media on tourism and to develop aggressive strategies for better promoting destinations through the audiovisual content.

6. Descriptive analysis and results

The data presented in the following figures offers a comprehensive analysis of international productions and co-productions that have chosen Greece as a filming site[2]. These figures present the current situation regarding the selection of Greece as a filming location, the countries of origin of the production or co-production companies, the types of productions that were partially or fully carried out in Greece as well as the locations that were the most popular filming spots. According to the data presented below, Greece is a popular filming location for audiovisual productions

[2] The Transparency Program Initiative, available online (in Greek) at: https://diavgeia.gov.gr/f/N.C.A.M.C. (last accessed on 20 January 2023)

with companies from the United States, France and the United Kingdom being the main representatives of the international audiovisual industry.

The data indicates that Greece primarily serves as a location for feature films with Athens/Attica being the most popular filming location. According to the analysis of the data above, it appears that Greece could benefit even more from attracting a greater number of international productions that have to do with TV series or short films.

Figure 1 illustrates the number of international productions and co-productions that have chosen Greece as a filming site from 1979 to the current time. The data indicates that this trend has risen over the last decades. During the period up to 1979 there were only 45 international productions, while in the decade that followed, i.e. 1980-1989, the corresponding number reached only 23, a decrease of 49%. This downward trend continued in the following decade (1990-1999) but not with the same intensity as the international productions realized in Greece reached the number of 19. The downward trend at the end of the century was reversed during the first decade of the 21st century with the international productions doubling to 38, a trend that continued incrementally in the following decade (2010-2019) with 90 international productions. Finally, the most recent data shows a continued increase, with 78 international productions in the period from 2020 until early 2023[3]. According to the data presented above it is clear that there is a positive trend in selecting Greece as a filming location for international productions.

Figure 1. Number of international (Co-) Productions with filming locations in Greece

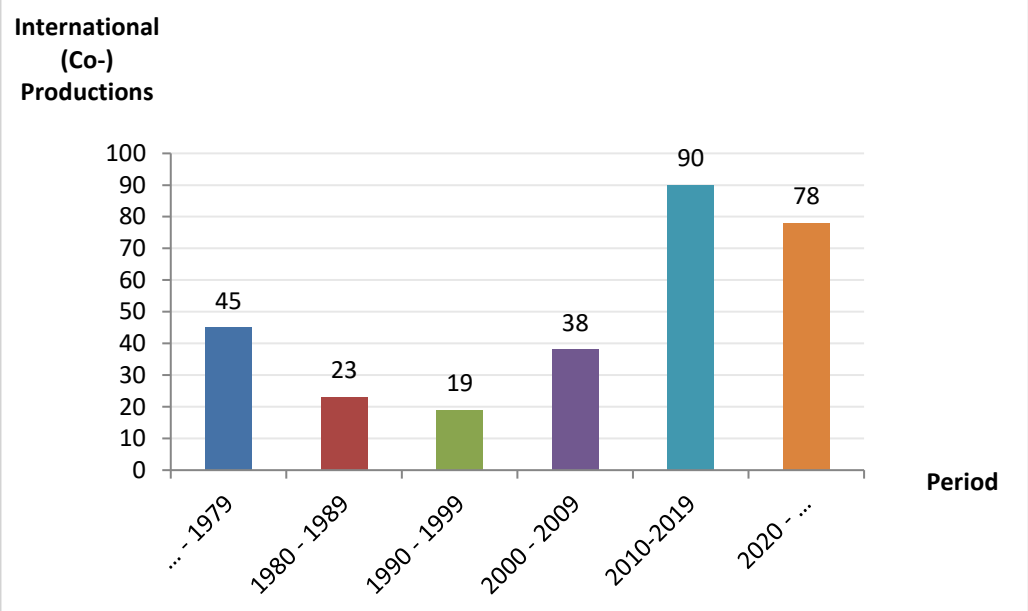
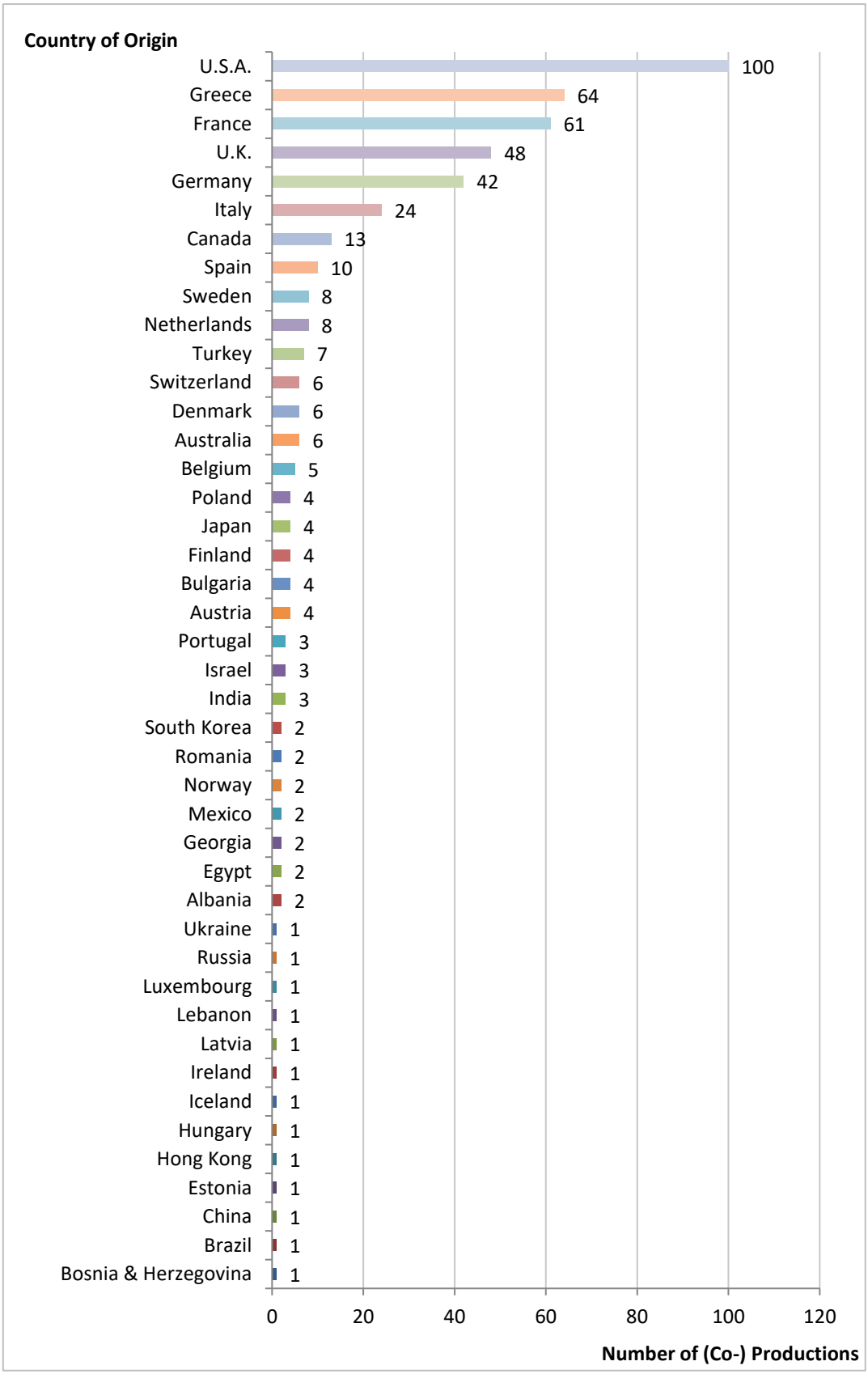


Figure 2 presents the origin countries of international productions or co-productions that have partially or entirely been filmed in Greece. 14 countries have filmed at least 6 productions somewhere in Greece with the United States topping the list with 100 productions followed by Greece with 64 co-productions and France with 61 productions. The United Kingdom, Germany, and Italy also have a significant number of productions with 48, 42 and 24 respectively.

[3] The data refers to the period from 2020 to 2023, including the productions that have been realized or have announced filming in Greece up until the end of 2023.

Figure 2. Origin of the Film Production Companies that have chosen Greece as a filming location



The number of international co-productions filmed in Greece, categorized by type of production, is presented in Figure 3. The analysis indicates that Greece primarily serves as a location for feature films. The presence of documentaries and TV series-documentary productions highlights Greece's unique landscapes and cultural heritage which serve as attractive locations for film shoots. Short films and TV series- reality account for a small percentage of the total audiovisual productions in Greece, situation that reveals there is space for growth for such projects. These types of productions usually target different audiences generating new revenue sources, hence Greece should strive for enhancing its reputation as an ideal location for such projects.

Figure 3. Breakdown by type of international (co-) productions that have chosen Greece as a filming location

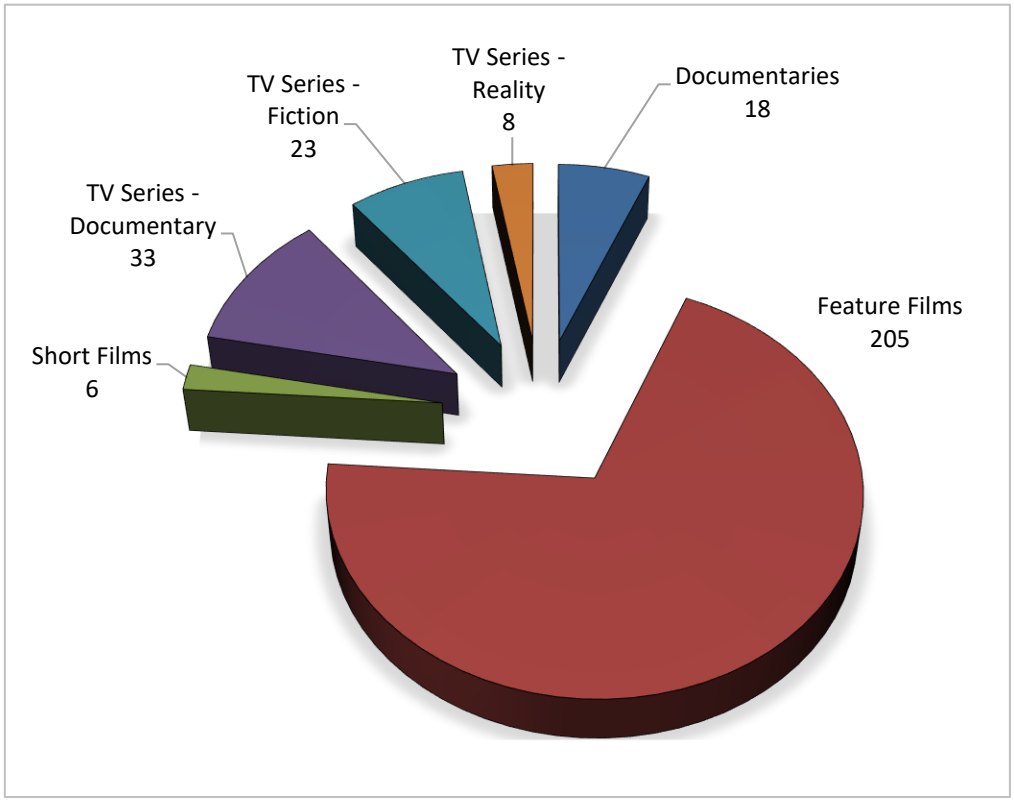
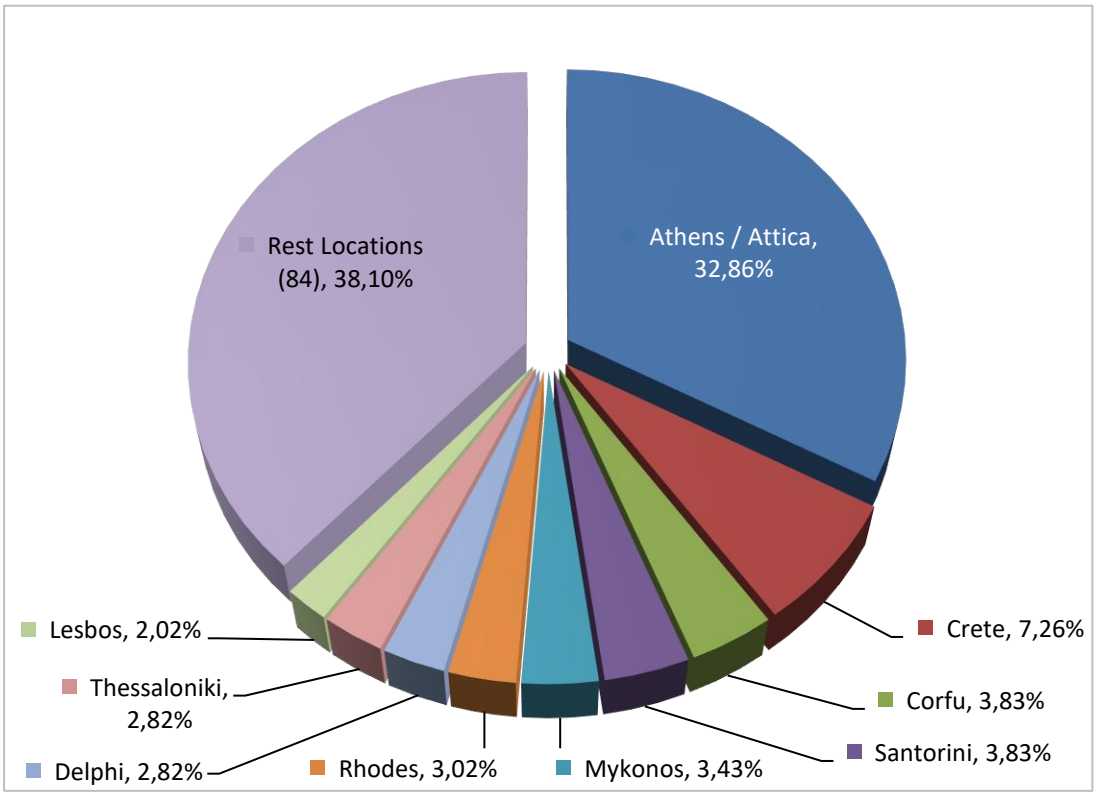


Figure 4 presents data on the filming locations of international productions in Greece. It shows that Athens, Attica is the most popular location with a 32.86% share of all filming locations. Crete, Corfu and Santorini are also relatively popular with 7.26%, 3.83% and 3.83% shares respectively. Mykonos, Rhodes, Delphi, Thessaloniki and Lesbos form a smaller part of the filming locations with the respective cuts ranging from 2.02% to 3.43%. The "Rest Locations (84)" category, which includes several locations accounts for the remaining 38.10% of the filming locations presented in the figure. Taking into account the data presented above, it turns out that Athens and Attica in general is the most popular location for international audiovisual productions in Greece, while Crete, Corfu and Santorini hold a smaller but rather respectable share.The rest of the locations presented in the figure are comparatively used less frequently for filming purposes accounting for a smaller proportion of the total filming locations. The "Rest Locations (84)" category suggests that numerous locations around Greece have been utilized for filming purposes,

however, due to their geospatial attributes or the absence of specialized personnel and/or infrastructure, they have not achieved widespread popularity.

Figure 4. Filming locations of international (co-) productions in Greece[4]



6.1 Greek cash rebate programme

The Greek National Centre of Audiovisual Media and Communication (EKOME) has implemented investment incentives such as the cash rebate and tax relief initiatives to support eligible expenses for both domestic and international audiovisual projects including fiction films, documentaries, television series, animations and digital games. While the cash rebate incentive has been in full operation since 2019 the tax relief incentive has received limited attention and has not proven to be as effective as the cash rebate one.

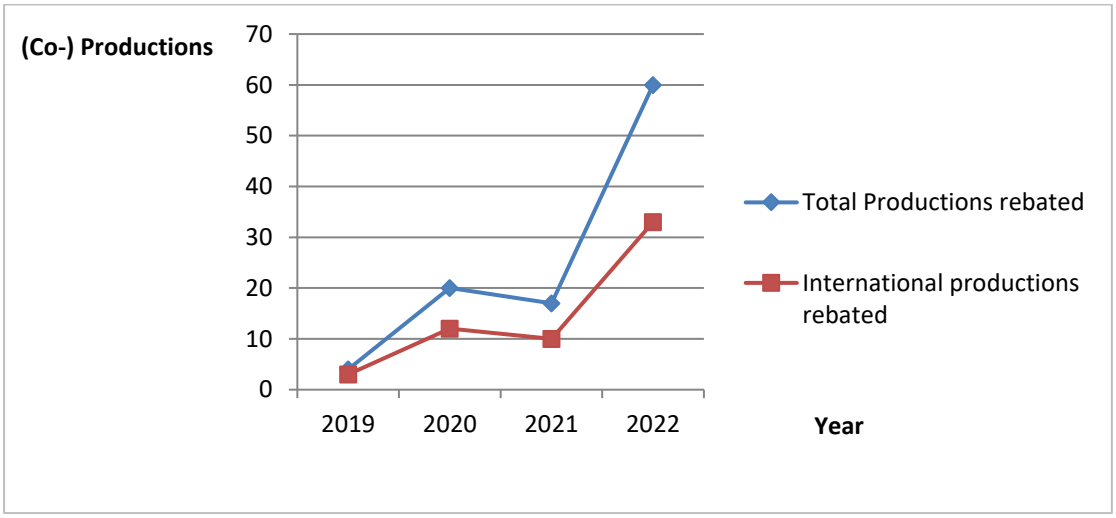
The cash rebate mechanism in Greece has been introduced as a policy measure to attract investment into the media industry. Current legislation has raised the rebate to 40% and reduced the minimum requirements making it more accessible for media companies. From April 2018 to October 2022, the program received 298 applications resulting in a total investment of €545 million in the media industry (EKOME, 2023).

The said policy measure proved effective in increasing the implementation of investment schemes of audiovisual producers while the positive initiative may activate corresponding initiatives in competing countries interested in attracting corresponding productions. The relaxed minimum requirements and the non-complexity of filing and application through the EKOME system have also made it easier and appealing for smaller companies to consider doing business in Greece.

[4] Source: Greek Film Centre and National Centre of Audiovisual Media and Communication

In the figure below (Figure 5) is presented the evolution in the total number of audiovisual productions realized in Greece and being rebated by EKOME during the period 2019-2022. In the same figure there is a separate presentation of the international investment schemes as a fraction of the total productions (local and international). As can be understood from the presented figures, there is a significant increase in subsidized productions during the period in question, so from only 4 productions in 2019 there were 60 in 2022. The corresponding individual data concerning international productions showed a respectively impressive increase as from 3 international productions in 2019 there were 33 in 2022, confirming the position that the Greek Cash Rebate Programme is becoming more and more attractive for foreign film productions. Therefore, it is obvious that there is a favorable trend in the production of audiovisual projects in Greece due to these incentives, a situation which is quite likely to have multiplying effects both for the Greek economy in general and for the country's tourism sector.

Figure 5. International and total (co-) productions that have been rebated by EKOME



In Figure 6 there is an analysis of the total cash rebate given by EKOME to international productions that were partially or completely filmed in Greece from 2019 to 2022. There is a clear increase in the overall cash rebate disbursements from €967.648,91 in 2019 to €33.885.500,40 in 2022, situation that shows a substantial growth in the popularity of Greece as audiovisual media productions' location.

According to the data of the cash rebate for international productions of the period 2019-2022 presented in the figure below, it appears that there is an ever-increasing interest in the implementation of international productions in Greece (from €834,237.45 in 2019 to €23,943,785.64 in 2022). The observed increase may be due to a significant extent to the cash rebate program of the Greek government through EKOME which is proving to be an attractive incentive for international production companies.

However, there was a slight decrease in the total cash rebate in 2021 which can be attributed to the Covid-19 lockdown and the relevant restrictions. Despite the observed temporary reduction during the second year of the covid-19 pandemic, there was a rebound of the increasing demand for inclusion in the Cash Rebate program and the implementation of international producers within the Greek territory.

Figure 6. Cash rebate to international productions and total cash rebate given by EKOME (in €m).

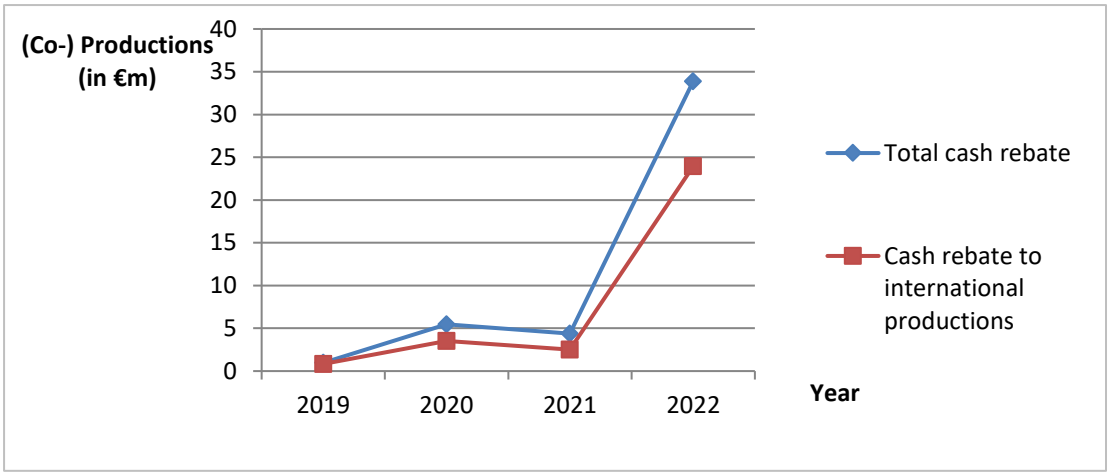
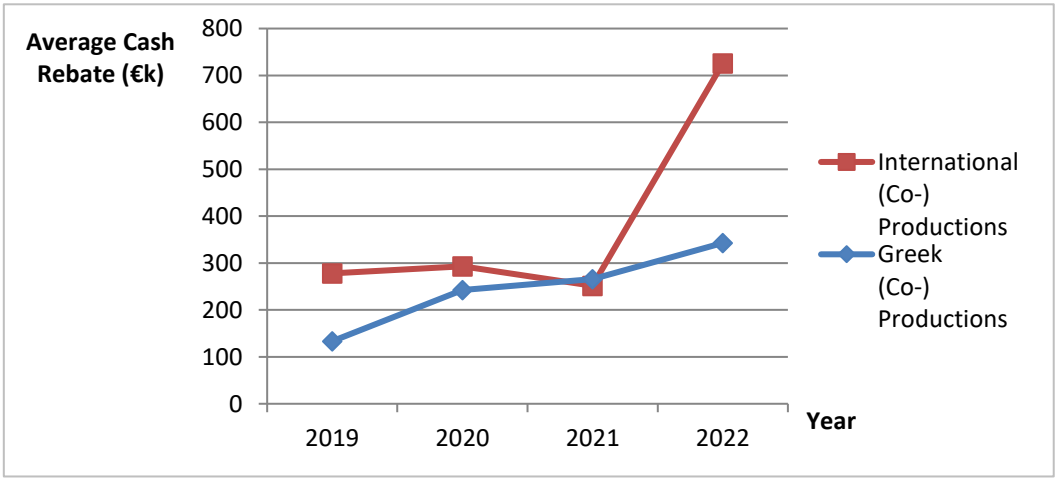


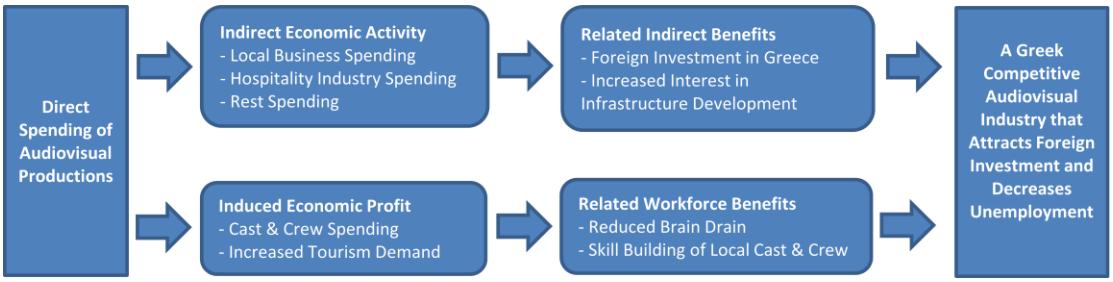
Figure 7 depicts the average cash rebate amount provided by EKOME to Greek and international (co-) productions that were partly or wholly filmed in Greece. The figure displays an increasing trend in the average cash rebate amount for both Greek and international projects with a conspicuous peak in 2022. It is noted, however, that despite the fact that the number of international productions remains below 75% of the total productions within the Greek territory, the respective average cash rebate is significantly higher than that of the Greek ones. For example, in 2019, the average cash rebate amount for an international production was over than two times higher than that of a Greek production. Despite the increasing trend in the average cash rebate amount over time, the cash rebate amount for international productions has consistently exceeded that of Greek productions, except in 2021. The observed rise in the average cash rebate amounts given by EKOME to international productions in 2022 could be attributed to several factors such as the rise of the financial resources allocated to the Greek cash rebate scheme, the streamlining of the respective audit procedures and the growing interest for filming in Greece. Nevertheless, the most prominent driver of this trend appears to be the substantially increased budgets available to international productions.

Figure 7. Average cash rebate amounts given by EKOME to Greek and International (co-) productions (in €k)



The impact of international audiovisual productions in a region and more specifically in Greece is presented in the figure below.

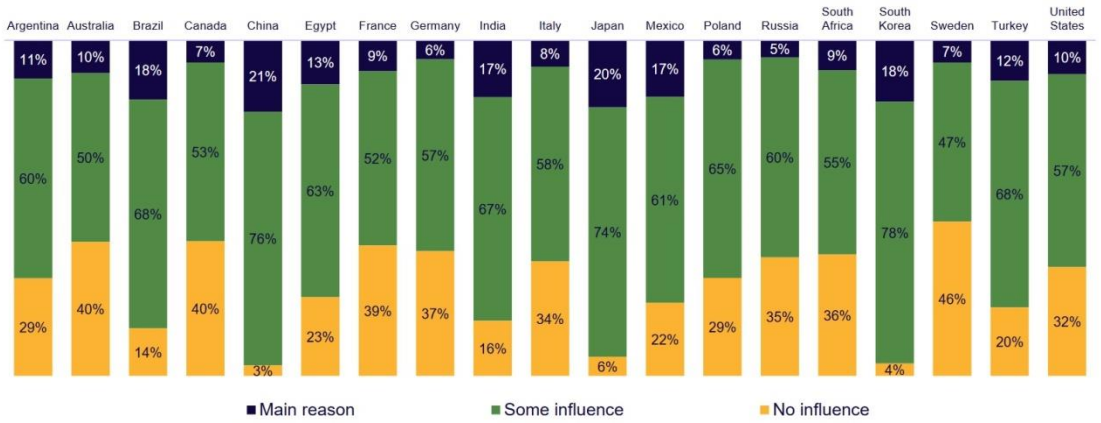
Figure 8. Impact of international audiovisual productions in Greece



The attraction of international production companies could positively affect the local economy since international audiovisual activity often brings high-standard productions that require the employment of technical and artistic professionals, a vital way to support the local workforce.

In Figure 9 is illustrated the variability of future interest in visiting film or TV locations among individuals who had not done so on their previous vacations, across different markets. The figure reveals that at least 50% of respondents in all markets expressed that such locations could influence their choice of holiday destination to some extent. Notably, the markets with the highest levels of agreement that film and TV locations could be a primary factor in their destination selection are China, Japan, South Korea, Brazil, India, and Mexico (VisitBritain, 2018).

Figure 9. Possible impact of a film or TV location on future destination choice[5].



Source: VisitBritain, 2018

The film industry need and should incorporate various technological types of infrastructure the use of which undoubtedly would have significant positive spillover economic effects. This can, in turn, generate additional economic activity along the supply chain such as in the transportation fuels, the food industry, the catering services etc.

[5] The question answered for this Figure was "To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?" (VisitBritain, 2018)

An important benefit from foreign film productions that is not considered as minor is the increased demand for services and consumer goods during filming processes. Acquiring equipment, transportation to and from the filming locations, catering for the production's people and other services can create a boost in the local economy. In addition, international audiovisual productions often choose to film in picturesque or unique locations, which can result in an increase in tourism demand for the region or country.

The Greek Foundation for Economic & Industrial Research (IOBE, 2014) has found that a million euros spent on film production in Greece result in an average increase of €1,4 million in domestic added value. This is broken down into a direct effect of €350k, an indirect effect of €300k from industries that supply film production with products and services and an induced effect of €750k from the consumption of a part of the additional income created in the economy. In terms of GDP, a million euros spent on film production works could have an impact of approximately €1,6 million with a direct effect of €372k, an indirect effect of €316k and an induced effect of €912k. The direct effect of a million euros spent on cinema is the creation of 9 jobs while the indirect effect translates into 7 additional jobs and the induced effect results in the creation of 14 additional jobs. It is estimated that around 30 jobs are created for every million Euros directly or indirectly spent on an audiovisual production. The radio-television and image & sound production sectors have the largest direct impact on employment followed by the hotel & restaurant sector and the employment agencies. The administrative services, planning, and agriculture sectors have the greatest indirect effect on employment while the largest induced effect on employment is found in agriculture, retail trade, and catering. The Greek state is estimated to collect revenues of €338.6k from tax revenues and other contributions for every million euro spent on film production.

EKOME has established the National Network of Audiovisual Production Facilitation Offices, also known as Film Offices, across the country's 13 regions and two major municipalities (Athens and Thessaloniki) aiming to upgrade the services and decentralize the audiovisual production activity so as to support audiovisual works throughout Greece. EKOME's proposal for the establishment and operation of the National Network of Film Offices is part of the Public Investment Program. As of now, EKOME has completed the plan and technical specifications for the network's implementation, initiated collaborations with regions and municipalities to establish local Film Offices and launched coordinated campaigns to promote the National Network of Film Offices in Greece and abroad.

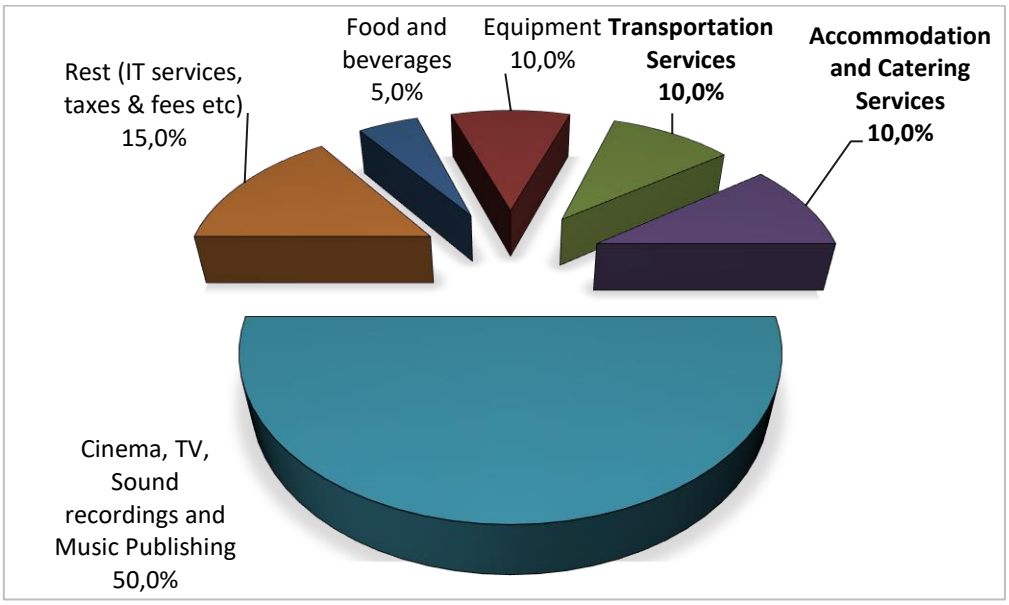
6.2 International Audiovisual Productions and Greek Tourism

The impact assessment of different types of international audiovisual projects on the tourism industry could be carried out in several ways. One such perspective is the use of incentives as a stimulus for film and television productions to choose a filming location in a country offering a rebate incentive. This often works as a promotional tool which is used quite often by the public and private authorities in charge of the host country so as to advertise its unique landscapes and cultural attractions to a global audience.

The economic benefits that spring from the development of film and TV productions have to do mainly with job creation and a relevant advancement of the local economic activity. The development of the audiovisual productions within the boundaries of a country could boost improvements both in the local infrastructures network and the necessary services such as accommodation and transportation, a

situation that undoubtedly could, among others, benefit visitors. Based on the data presented in Figure 10 it can be assumed that the aggregate cost for Accommodation & Catering Services and Transportation services could reach up to 20% of the overall cost of an audiovisual project.

Figure 10. Descriptive breakdown of the costs associated with the production of an audiovisual production



Source: IOBE (2014)

Successful communication strategies for promoting Greece as a tourism destination are considered to be of high importance in the era of social media. Greece has been benefited implementing relevant strategies, as demonstrated by the positive reception of foreign productions sets in regions such as Crete, Corfu, Hydra, and Rhodes.

While it is currently difficult to quantify the impact of international audiovisual productions on tourism arrivals and receipts in Greece between 2019 and 2022 due to the exceptional circumstances of the Covid-19 pandemic, the increase in such productions in recent years suggests a favorable and dynamic relationship between this sector and the Greek tourism industry.

An analysis of tourist traffic in Greek prefectures reveals a positive correlation between the attraction of foreign films and an increase in hotel accommodations for foreigners. Foreign films such as “Lara Croft: Tomb Raider” in Santorini and “Captain Corelli’s Mandolin” in Kefalonia have led to significant boosts in tourist arrivals to these areas. In the Cyclades prefecture, there has been a 12,3% increase in the number of foreign visitors staying in hotels in the region compared to the expected performance if the filming of "Lara Croft: Tomb Raider" had not occurred (IOBE, 2014). The release of "Mamma Mia!" in 2008 which was filmed in Skopelos, Skiathos, and Pelion is estimated to have resulted in a tourism increase of over 5% compared to the previous year.

Additionally, past film productions such as "Boy on a Dolphin," filmed in Hydra in 1957, "The Guns of Navarone," and "Zorbas the Greek" brought international attention to the Greek islands of Rhodes and Crete, respectively. In 1989, the film "Le Grand Bleu" was filmed in Amorgos, leaving approximately 13m drachmas (~€40k)

of additional revenue for the island. This amount corresponds to about 7,5% of Amorgos' gross annual income of 180m drachmas (~€530k) at that time, indicating a significant impact from the production of a single film.

In conclusion, despite the fact that it is not easy to collect statistically significant estimates for the effect of international audiovisual productions on specific Greek destinations, at a national level there is an apparent positive correlation between the increase in productions realized in Greece and the tourism demand.

7. Discussion

The figures presented above include a comprehensive analysis of the international audiovisual productions that have chosen Greece as a filming location. These figures confirm that in recent years an increasing tendency of choosing Greece as a filming location for both domestic and international productions is observed. The United States of America ranks first among the origin countries of international productions in Greece, while the region of Attica and Athens in particular turns out to be the most popular filming location for feature films. From the data available to date it appears that there is room for growth as far as the production of short films and television series or reality shows is concerned.

Further development of initiatives related to international audiovisual productions in Greece could be a starting point of new employment opportunities both in the specialized sector of audiovisual media and in sectors directly or indirectly related to the former. Furthermore, experienced professionals of the audiovisual media industry could help the respective local industry to further blossom through the skills advancement of the local professionals and the creation of new business opportunities.

The enhanced international promotion of Greece through several audiovisual productions had positive effects of varying intensity for different sectors of the Greek economy through the increase in tourist flows, the employment of specialized professionals and the increased consumption of products and services in the regions where the production company was active. Cash rebate incentives essentially contributed to the attraction of audiovisual productions which subsequently contributed to the abovementioned positive results.

The prudential and systematic development and implementation of communication and promotion strategies related to the attraction of international producers and the promotion of Greek landscapes through international productions of films and TV series could help Greece to remain and even further ascend in the ranking of the world’s top tourist destinations. Through the analysis of tourist flows in areas of Greece where popular audiovisual productions were realized it emerges that in the years following the release of the audiovisual products, an increase in visitors was observed in the filming areas. From what is presented above, it occurs that the implementation of cash rebate incentives combined with effective communication strategies to attract foreign producers could prove to be significantly beneficial for the development and growth of the Greek tourism product.

8. Conclusions

This paper examines the outgrowths from the increased number of international audiovisual productions across the Greek territory with emphasis on the tourism product. In addition, the development of the sector in Greece is estimated to lead to the creation of a significant number of new jobs which may reduce the unemployment rates in certain semi-urban or remote areas of the country. The positive results from

the development of international productions focus mainly on the hospitality, catering and mass media sectors. The above analysis also shows that the increase in audiovisual productions that took place in Greece and aimed at an international audience has a positive impact on the Greek tourism as Greek landscapes become attractive leisure destinations for foreign tourists as well as candidate filming locations for new international productions.

The findings presented above could be rather useful for policymakers. Firstly, according to the data presented there is a clear positive trend in the use of Greece as a filming location proven by the significant increase in the number of international productions over the years. To take advantage of this growth opportunity EKOME has implemented investment incentives such as the cash rebate and tax relief initiatives to support eligible expenses for both domestic and international audiovisual projects. Furthermore, the expansion of short films and TV productions could be proved crucial in attracting more audiovisual projects. Secondly, the research reveals that for every million euros spent on motion picture production approximately 30 jobs are created in the economy with the radio-television and image & sound production sectors having the largest direct impact on employment. Therefore, policymakers could prioritize the development and implementation of education and training programs so as to have skilled workforce to meet the growing employment needs of current and new audiovisual projects. Furthermore, according to this study it is evident that international audiovisual productions may significantly and positively support the growth of the Greek tourism industry by stirring up increased visitor flows while policymakers, to further boost countrywide tourism activity, should include in their operational plans promotional tools that focus on Greece's diverse landscapes, historic attractions and cultural heritage.

Greece should continue developing and implementing policies that aim to further boost both local and international audiovisual activity across the country. EKOME and other related key factors such as the Greek Film Centre (GFC) should continue their efforts in promoting Greece as an attractive location for expanding audiovisual production types by enhancing the country's reputation through coordinated marketing campaigns developed in collaboration and synergies with key tourism factors such as the Greek National Tourism Organization etc. and working closely with local film offices in the regions and municipalities. The effectiveness of the current incentives granted by the Greek public authorities could be the subject matter of further research, especially if is combined with the effects to the related employment rates. Finally, the different types of tourists that could be attracted by the audiovisual productions promoting the Greek landscape and how this trend could be productively combined to sustainable tourism practices could be a research topic of increased interest.

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