

E.N.T.I. PROGRAMME IN EPIRUS

**REPORT OF THE TOURISM
WORKING GROUP**

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About the Author

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Mr Swarbrooke is the author of seven books on tourism and has worked on tourism projects in Bulgaria, Brazil, Indonesia, Jordan, Palestine, Russia, and Saudi Arabia. He has also worked in Greece for more than 10 years, contributing to projects in Crete, Evia, Halkidiki, Kavala, Lesbos, and Thessalonika.

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Introduction

The project was carried out between March and September 2004 by the project coordinator in cooperation with BIC Epirus.

The main aims of the project were to :

- produce an up-to-date SWOT Analysis of tourism in the Epirus region
- offer a range of case studies which were relevant to the situation of the tourism industry in Epirus
- develop a programme of proposed concrete actions to develop the tourism industry in Epirus
- suggest the format for a business plan competition for both individual enterprises and clusters
- identify areas for the development of new tourism enterprises
- provide a checklist of advice on how to be a successful tourism entrepreneur

Throughout the duration of the project, the Project Coordinator has focused on the whole of Epirus, including all four prefectures.

Methodology

The project has been carried out in accordance with the following methodology:

- visits to the region by the project coordinator in March 2004 for 3 days, from 26-30 April [5 days], 14-18 June [5 days] and 26-29 September [4 days]
- the setting up of a working group which contributed ideas and information to the project. The working group represented the public and private sectors and all four Prefectures, including the four Chambers of Commerce
- the working group met on 5 separate occasions with a set agenda and notes were made of the results of the meetings. These notes then informed the work of the Project Coordinator
- two thematic workshops were held on 30 April and 18 June on the theme of e-commerce in tourism with presentations by representatives of the University of Ioannina and the University of the Aegean
- Data, as required by the Project Coordinator, was collected and provided by BIC Epirus
- Research on case studies was carried out personally by the Project Coordinator

An important part of the methodology was the programme of visits made by the project coordinator to a wide range of tourism organisations and sites, to gather information. These visits were in addition to previous visits made by the Project Coordinator to the whole region between Spring 1999 and Summer 2003.

The visits in April 2004, June 2004, and September 2004, included :

- The Prefectures in – Arta, Ioannina, Preveza, and Thesprotia
- EOT Offices, Ioannina
- The Chambers of Commerce in Arta, Igoumenitsa, Ioannina, Preveza
- The Municipality of Metsovo
- Parga – investigating the product and market and the excursions offered by local travel agents
- Nikopolis archaeological site, Preveza
- Amvrakikos Gulf wetlands including the museum and environmental education centre in Koprena
- The Preveza-Igoumenitsa coast road
- TEI tourism department, Igoumenitsa

- The new and old ports of Igoumenitsa
- Aktio Airport

- Hotel Bourazani and Environmental Park, Konitsa
- Hotel Galaxy, Metsovo
- GHS Female Agrotourism Cooperative, Anatoli, Ioannina
- KEPAVI Silver Crafts Cooperative, Ioannina
- Glinavos Winery, Zitsa
- Zagoria Villages
- Robinson Expeditions, Kipi

The Project Coordinator also attended a meeting of the Cluster which has recently been established, comprising enterprises from Zagoria, Ioannina, and the Municipalities of Konitsa and Metsovo. This meeting provided an opportunity for the Project Coordinator to advise the Cluster and find out more about their plans.

At the same time, the Project Coordinator carried out research on the tour operators who already bring groups to Epirus.

The first step in the process of delivering the outcomes of the project was the SWOT Analysis covering the whole region.

S.W.O.T. ANALYSIS

Introduction

Many positive developments have taken place since the author produced his first SWOT Analysis of Epirus in 2000.

Most importantly, perhaps, of these developments have been infrastructure projects, particularly the building of new roads. However, there have also been other developments such as the work on e-commerce in tourism at the University of Ioannina and the creation of a tourism 'cluster'. However, many of the weaknesses noted in 2000 are still evident today.

Furthermore, in the intervening four years there has also been a growth in competition, most notably from nearby countries such as Croatia and Bulgaria.

Following the visits made by the author around the region in Summer 2003 and Spring 2004, here is the 2004 SWOT Analysis for Epirus as a tourist destination.

Strengths and Weaknesses

(i) Attractions

Strengths

- * Superb natural scenery with unique features such as the Vikos Gorge, which are of European significance
- * Rich flora and fauna with species which are rare or extinct elsewhere in Europe, for example, brown bears and wolves
- * The museums of Ioannina have improved and are getting better all the time
- * Distinctive, aesthetically attractive traditional architecture in the Zagoria villages, and Metsovo
- * The environmental education centres at Bourazani, Koprena, and Salaora are of a good standard
- * Unique bridges and traditional paved paths, which are ideal for walkers
- * Great potential for activities both water-based [rafting, angling, kayaking], and land-based [walking, cycling, climbing]
- * The regional capital Ioannina has an attractive location, and a wide range of attractions for tourists
- * The existence of traditional festivals and events in villages and towns
- * The new centre for the Silversmiths in Ioannina is impressive
- * Superb wetland environments in the coastal areas, with rare birds and plants
- * There is potential for winter sports, particularly skiing

Weaknesses

- * A lack of easily available, detailed information on both natural and man-made attractions
- * In general, most museums are apparently under-funded and do not make use of the latest museum and interpretation techniques
- * The short or irregular opening hours of many museums makes it difficult for tourists or tour operators to plan itineraries around visits to them
- * There is a lack of on-site interpretation [graphic panels, information signs] at heritage sites and natural sites, although the situation is improving
- * The absence of a museum about emigration which has clearly been a major feature of life in the region through the ages, is a weakness
- * The city of Ioannina is not marketed sufficiently as a destination with major attractions and its own identity
- * The lack of publicity about traditional events and festivals in towns and villages, in foreign countries
- * Too little emphasis is placed on traditional crafts as tourist attractions in most of the region
- * The lack of good nature interpretation and wildlife watching guides
- * The infrastructure for winter sports is very weak

(ii) Hospitality Sector

- * Many village inns are relatively new and of a good standard
- * Ioannina has a wide range of serviced accommodation including some high quality establishments
- * The new hotel classification system in Greece will reduce confusion amongst foreign tourists
- * Investment in new hotels is continuing
- * Greek people seem to be aware of accommodation in the region
- * There is a growing stock of accommodation on the coast
- * The region has a distinctive traditional cuisine based largely on organic food
- * There are a growing number of outlets where tourists can buy food products
- * The vineyards of Zitsa are an interesting attraction and producers such as the Glinavos Wineries have great potential as attractions
- * Restaurant / Taverna meals are generally of good quality and at a reasonable price
- * Most hotel personnel are technically competent
- * Most hotels are very clean and well maintained
- * The season is quite short
- * Some areas of the region lack the accommodation stock necessary for developing tourism
- * It is still very difficult for foreign tourists to book accommodation in Epirus via the Internet
- * There continues to be a lack of campsites and youth hostels
- * It is very difficult for foreigners to access information about accommodation in Epirus
- * Much coastal accommodation is dependent on tour operators for business
- * There is no opportunity for visitors to learn how to cook traditional Epirus dishes
- * There is not a coherent gastronomic package on offer for tourists in most parts of the region
- * Greater emphasis could be placed on promoting the Wines / Tsipourg of Epirus
- * There is a lack of education and training provision in the hospitality sector in the region
- * In some larger hotels there can be a lack of hospitality and personal attention
- * Hotel restaurants can be very disappointing and do not offer enough regional cuisine

(iii) Accessibility and Transport

- * Major road improvements have taken, and are taking, place, which are making the region more accessible to tourists
- * The road network is quite extensive
- * The signposting of attractions has improved in recent years
- * The port at Igoumenitsa welcomes many tourists each year, from Corfu and Italy, for example, and facilities are being improved
- * Direct scheduled flights to Athens and Thessalonika from Ioannina
- * Preveza has a good runway, capable of handling major jets, and welcomes charter flights from Western Europe
- * The Aktio tunnel has increased the accessibility of Preveza airport to Epirus as a whole
- * The new border crossing with Albania near Bourazani will help develop tourism in Epirus
- * Car hire is available
- * New roads do affect the aesthetic beauty of the landscape in some places
- * Journey times are still long in many parts of the region
- * There is still a need for more consistency in signposts and more indication of destinations on signs
- * The roads from Igoumenitsa are still inadequate although improvements are taking place
- * The flights from Ioannina suffer from low capacity and unreliability due to weather
- * The charter flights only operate from April – October
- * Car hire is relatively expensive and there is a lack of variety of cars to hire
- * There is a lack of marinas in comparison to other parts of Greece

(iv) Destination Marketing	<ul style="list-style-type: none"> * EOT has an office in Ioannina which is linked to the wider EOT organisation nationally * Substantial funding is available currently for marketing Epirus as a destination, mainly via the European Union * The public and private sectors are becoming increasingly interested in marketing Epirus as a destination * The University of Ioannina has developed an e-booking systems for hotels * Some areas of the region eg. Zagoria and Metsovo have a growing reputation with foreign tourists although they are still relatively little known outside Greece * The area as yet untouched by tourism could be very attractive to tourists in future, if tourism development is controlled 	<ul style="list-style-type: none"> * There is a lack of a coherent marketing organisation to market the region as a whole and spend the money which is available for destination marketing * There is a lack of effective cooperation between the public and private sectors in destination marketing * Much marketing tends to be poorly targeted so that it does not meet the needs of the market * The area lacks a single marketing organisation that could develop a clear brand identity for the region * Little effective use is made of the Internet to market Epirus to tour operators and tourists * Public sector involvement in destination marketing is fragmented and not as effective as it could be * Not enough effort is spent on packaging the Epirus product for tour operators * Some areas of Epirus are hardly known outside the region, even by Greek tourists * The areas which are currently most popular with tourists are showing signs that they may be approaching their carrying capacity in the peak season * More could be done to extend the season and / or increase visitor spending * The lack of public sector tourist information centres like those in France, UK is a real weakness
(v) The Local Tourism Industry	<ul style="list-style-type: none"> * A new 'tourist cluster', the first of its kind in the region has recently been established * Some local entrepreneurs are already doing business with foreign tour operators and attracting foreign tourists * There are several successful adventure tourism organisers based in the region 	<ul style="list-style-type: none"> * There seems to be little evidence of commitment to developing clusters in the region as a whole at the moment * Many entrepreneurs are inexperienced at working with foreign tour operators * Many entrepreneurs seem to lack expertise in marketing * There is a lack of qualified, trained adventure tourism guides * There is a general lack of flexible training and education opportunities, for both tourism officials and entrepreneurs

The Situation in the Four Prefectures

While the SWOT Analysis covers the region as a whole, it is important to recognise there are differences between the four Prefectures in terms of strengths and weaknesses. At this stage, therefore, the author would like to say a few words about tourism in each of the four Prefectures, today :

ARTA. Arta has great potential to develop 'alternative' tourism but it is impeded by infrastructure problems, particularly transport. However, the Amvrakikos Gulf is an outstanding attraction of European significance and the environment centres at Koprena and Salaora are high quality. There is also potential for mountain tourism and there is now a union of traditional accommodation operators. There is also scope to develop specialist tourism based on its Byzantine monuments. There is a need to develop education and training for entrepreneurs to help them market their products and services. At the same time, there needs to be encouragement for entrepreneurs to work together to promote the area.

IOANNINA. This Prefecture contains many of the well know attractions of the region, notably the villages of Zagoria and Metsovo. Both have a strong reputation in Greece and are becoming increasingly known by foreigners. However, there is a risk that both areas are suffering from overcrowding at certain times of the year. The City of Ioannina is getting better and better as a destination in reality, but it will lack a clear brand identity in the international market. The new centre for the silversmiths could become a major attraction if it is well promoted. The lack of international flights and the limited domestic services to Ioannina airport is still an obstacle to tourism development in the region.

PREVEZA. Preveza has the only airport in the region – Aktio - which attracts international flights, albeit seasonal charter flights only. The new tunnel has made the airport more accessible to the rest of the region. Preveza also has a good reputation for its seafood restaurants. However, it lacks a clear brand identity. On the other hand, it has the Nikopolis archaeological site which is one of the most important in Greece. However, the site is not well interpreted for visitors, lacks opportunities for souvenir buying and is not well promoted.

THESPROTIA. The coast contains a number of pleasant, small resorts that have not been over-developed. However, it is important to ensure that they do not become over-dependent on high volume, low price foreign tour operators. Igoumenitsa is very important as a gateway to Epirus with its ferry services to Italy. It is also important because of the ferries to Corfu which can be used by day visitors to Epirus. However, the old port needs better facilities for tourists and information to help develop tourism in the region like those at the new port. Perhaps more could be done to encourage people to spend some time in Igoumenitsa rather than simply passing through to and from the ferries.

It is now time to look at the tourism world in which Epirus exists to see what opportunities and threats it faces, now and in the future.

Opportunities and Threats

Opportunities

Threats

(i) Competition	<ul style="list-style-type: none"> * Epirus has more potential appeal to tourists than virtually any other region in Greece * The road improvements including those planned will make Epirus more accessible to Greek tourists * Epirus has natural and cultural attractions which are, potentially, as good as those in other European countries 	<ul style="list-style-type: none"> * Rural / Agro Tourism is less developed in Epirus than in regions such as the Peloponnese and Pilio * Epirus is very inconveniently located for tourists from Athens * Many other European countries have developed their rural tourism much more than Greece, such as France, Italy, Spain, Portugal * Some of the new EU countries such as Cyprus, Slovenia, and Poland already have well developed rural tourism industries * The countries near to Greece such as Bulgaria and Croatia are rapidly developing their rural tourism potential * In the longer term Albania will become an attractive destination for adventure tourists
(ii) Market Trends	<ul style="list-style-type: none"> * The region can exploit a range of market trends in Europe, including : <ul style="list-style-type: none"> - the desire to visit destinations which are "off the beaten track" - the growing interest in special interest holidays such as botany, photography, painting, cooking, art appreciation - the increasing demand for activity and adventure holidays such as rafting, kayaking, bungee-jumping, cycling, horse-riding, and walking - the concern of Northern Europeans with healthy eating and organic food - the rise of 2nd and 3rd holiday-taking in Northern Europe - the growing interest in heritage and particularly the heritage of ordinary people and local communities - the growing interest of tourists in industrial or workplace tourism ie. visiting places of work or craft enterprises 	<ul style="list-style-type: none"> * The demand of today's cultural tourists for high quality interpretation of heritage sites, which is currently rather lacking in the region * The general lack of packaging of the product for tourists and tour operators to make it easy for them to buy, compared to some other destinations
(iii) Environmental Issues	<ul style="list-style-type: none"> * The region is well placed to benefit from the current increase in concern over environmental issues and environmental quality Europe-wide * The region could exploit the growing interest in organically produced food 	<ul style="list-style-type: none"> * Failure to adequately plan tourism development and protect the natural environment would make the region less attractive to foreign tourists
(iv) European Union Funding	<ul style="list-style-type: none"> * European Union funding is available for a range of types of projects that could help develop eco-tourism in the region 	<ul style="list-style-type: none"> * An over-reliance on European Union funding could lead to the development of projects which are not economically viable or sustainable in the longer term * The enlargement of the European Union will reduce the level of funding available for projects in Greece, and will lead to competitor countries receiving funding to exploit their potential

(v) Technological Developments	<ul style="list-style-type: none"> * Developments such as Internet could offer a cost-effective means of marketing the region to the appropriate niche markets in Europe * Technologies such as Virtual Reality and interactive computer programmes could be used to interpret local heritage 	<ul style="list-style-type: none"> * Many other competitor destinations are already using the Internet effectively as a marketing tool and others are starting to do so * Other destinations are already making use of new technologies to interpret their local heritage, and others are starting to do so
(vi) Government Policy	<ul style="list-style-type: none"> * The Greek government and EOT are committed to developing alternative forms of tourism, such as eco-tourism, and developing less seasonal forms of tourism like eco-tourism * Eco-tourism could be seen as a way of helping sustain rural communities and diversifying the rural economy 	<ul style="list-style-type: none"> * A lack of resources may inhibit the role of the government and EOT in the development of eco-tourism * More needs to be done to involve young people and women in rural tourism, as it is on these people that the future of rural communities depends

The Potential Impact of the Egnatia Highway Project

The Egnatia Highway is an exciting project that will have a major impact on tourism in Epirus.

On the positive side, it could make the region much more accessible for foreign tourists and for Greek tourists from Thessaloniki. It will also make it easier for tourists to travel around the region once they have arrived.

However, it could have a negative impact as well if it is not well managed. For example, it could :

- make it easier for tourists to cross the region from east to west or vice versa without needing to stop
- bypass many villages so that there will be a 'corridor' of development, but little or no development beyond the corridor
- discourage visits by tourists who feel the new road has damaged the peace, tranquillity, and beauty of the region

The impact of the road will only be positive if action is taken to :

- develop 'local tourism clusters' of attractions and hotels to tempt travellers to leave the highway
- provide information for travellers to encourage them to explore areas away from the highway

Summary

We can end this SWOT Analysis of Epirus as a tourist destination in 2004, with a few, general conclusions, as follows :

- (i) Epirus still has great potential as a rural / agro / ecotourism destination
- (ii) The marketing of Epirus is still under-developed and there is a lack of effective public-private sector partnership
- (iii) The regions' first tourism 'cluster' has been set up but it is still the only one

- (iv) The Internet could help Epirus compete but its use is still little developed
- (v) Major infrastructure projects, particularly roads, are underway but the region still lacks good air links with the outside world
- (vi) Competition has increased greatly in recent years, particularly from countries in Eastern Europe and the Balkans, as well as Cyprus, particularly in agro / eco / rural tourism

In general, Epirus has become an even better destination in recent years but it is still not marketed effectively enough while its competitors in Greece, and abroad, are getting better and better at marketing.

COMPETITOR ANALYSIS FOR EPIRUS IN INTERNATIONAL TOURISM MARKETS

The international tourism market is a very competitive one, particularly for the types of tourism – ecotourism, adventure tourism, cultural tourism – which Epirus wishes to attract.

If Epirus is to be successful, therefore, it needs to have a clear understanding of who its competitors are, together with their strengths and weaknesses, so that the tourism industry in Epirus can decide how it can gain a competitive advantage over them.

The author therefore presents below a brief analysis of some of the key competitors for Epirus within Greece, elsewhere in Europe, and elsewhere in the world. It is important to look at the situation globally because the tourists of Northern Europe are increasingly able, and enthusiastic, to travel to places all over the world in search of high quality tourist experiences.

The case studies which follow this section also help identify areas of good practice in competitor destinations which Epirus needs to take into account when planning its marketing.

1. Competitor Destinations Within Greece

- a. *The Peloponnese*. This area is popular with foreign tourists because it is accessible to Athens and has great natural beauty and one of the greatest concentrations of historic sites in the world. Epirus cannot compete with this region in terms of cultural and archaeological products or accessibility.
- b. *Pilio*. This area is rapidly growing in popularity with foreigners and is now a very 'trendy' fashionable destination. It is close to Volar and is renowned for its green, verdant, landscape and its lovely beaches. Epirus is also able to combine beach and rural attractions in the same vacation.

- c. *Crete*. Perhaps the market leader in ecotourism in Greece, with a strong reputation for trekking and organic food production in foreign markets. However, it is difficult to travel on scheduled air services
- d. *Lesvos*. An island with a distinctive landscape, and high quality gastronomy, with locally produced Olive Oil and Ouzo of a particularly high standard. However, it is not very accessible for foreigners

However, Greece also contains a large number of established mass market destinations which are all starting to look at the development of ecotourism such as Corfu. At the same time, less developed destinations are seeing ecotourism as a good opportunity to grow their tourism industry, including Evia, for example.

Furthermore, there are a number of islands which are beginning to be discovered by foreigners in search of tranquil, unspoilt destinations, such as Lefkada for example. However, it has to be said that Greece does not yet have a reputation for ecotourism / adventure tourism in foreign markets. This makes it difficult for regions like Epirus to promote themselves as destinations.

2. Competitor Destinations in the Rest of Europe

Epirus faces competition from a number of European destinations in the markets for different forms of tourism in which there is potential for Epirus, notably ecotourism, agro-tourism, cultural tourism, and adventure tourism. The author will now highlight some of these competitor countries.

1. *Cyprus*. Cyprus has developed 'agro-tourism' to a high level due to the action of its national tourist organisation, the C.T.O. and the dynamism of entrepreneurs such as Cyprus Villages Traditional Houses [see case study in next section]. Conversion of old buildings to tourist accommodation has been a key factor in their success, together with good marketing and cooperation with foreign tour operators.
2. *Bulgaria*. Bulgaria has well established rural tourism, particularly in terms of small hotels and guest houses. It also has a huge price advantage with very low costs for tourists. There is already considerable foreign investment in holiday homes in Bulgaria. There has also been the creation of a national tourism 'cluster', the Bulgarian Association for Alternative Tourism, which has encouraged cooperation between entrepreneurs [see case study in next section].
3. *France*. The public sector has taken the lead in developing rural tourism with the re-use of agricultural buildings [gîte accommodation – see Gîtes de France case study in next section]. They have also set up Loisirs Accueil organisations which help tourists book rural tourism properties. They have also encouraged the growth of rural hotels offering local cuisine through the 'Logis de France' initiative.
4. *Portugal*. The emphasis has been on converting large rural properties into 'Manor House' accommodation for tourists. In Northern Portugal we have also seen the use of traditional local gastronomy as a means of trying to attract tourists.

5. *Majorca, Spain.* While busy with mass market coastal tourists in the summer, Majorca has developed a good Spring and Autumn market by promoting walking holidays in the interior of the island.
6. *Austria and Switzerland.* These Alpine countries attract tourists all year round by promoting nature holidays in Spring, walking in summer and snowsports [skiing and snowboarding] in winter. Prices are high but product quality is also high and there is integrated coordination between trains / buses / air services to meet the needs of tourists.
7. *Scandinavia.* The countries of Iceland and Finland, particularly in Scandinavia, offer great adventure and eco-tourism products for which they charge very high prices. These include whale-watching, bathing in hot mud, hotels made of ice, and snowmobile tours.

At the same time, many relatively low cost European destinations are seeking to develop eco-tourism, adventure tourism, and cultural tourism. As well as low prices, they often have the advantage of being unspoilt and having a well educated workforce. In many of them, there is a real entrepreneurial spirit and a desire to set up dynamic new businesses. Such centres include Croatia, Estonia, Hungary, Poland, Romania, and Slovenia for example.

In future these countries will be tough competitors for Epirus and Greece in general.

3. Competitor Destinations Outside Europe

There are many excellent eco-tourism destinations outside Europe; indeed the growth of eco-tourism is really taking place in destinations outside Europe. Here are a few examples of non-European eco-tourism destinations :

1. *Jordan.* Jordan is just beginning to exploit its eco-tourism potential in terms of well organised nature reserves, culture, archaeological sites and some of the world's best diving sites in the Red Sea. See the case study on the Royal Society for the Conservation of Nature in Jordan for more details.
2. *Morocco.* The deserts and mountains of Morocco have become very fashionable with Northern Europeans due to the high quality traditional accommodation and gastronomy, together with excursions such as ballooning over the desert, and visiting Berber villages.
3. *Belize and Costa Rica.* Both countries have developed a global reputation for eco-tourism, based on stringent conservation of their natural resources, the development of eco-friendly accommodation, and careful control of tourism development.
4. *Malaysia and Thailand.* Both countries have combined beaches with nature and culture, with opportunities to meet local tribes people. They have also marketed themselves as health destinations with hotels with luxurious spas using traditional massage techniques.

At the same time, many other non-European countries are increasingly looking to exploit what they have to offer to become eco-tourism destinations, including Turkey.

It is now time to explore some Case Studies that offer lessons that are relevant for the future development of the tourism industry in Epirus.

CASE STUDIES

It is always helpful to look at examples of practice in other countries to see if they offer potential lessons for a destination, such as Epirus. We need to note that case studies :

- may illustrate good practice or bad practice as both are helpful for a destination to learn from
- relate to a particular period in time and may well change over time
- relate to particular locations, and allowances for local conditions will need to be made if the lessons from them are to be applied to other places, such as Epirus

The author has endeavoured to collect case studies that may offer valuable lessons for Epirus specifically.

In general, the cases are taken from Europe, including other parts of Greece, but there are examples from outside Europe to prove that Epirus is involved in a competitive global market.

Rather than simply being descriptive, the cases include analysis identifying the key points and lessons that arise from them for Epirus.

The case studies are, as follows :

- 1. Greece cases** : Dadia Ecotourist Centre, Evros
: Amorgos Nature Package Holiday –
an example of Responsible Tour
Operations
: Milia Traditional Settlement, Crete
- 2. Foreign cases** : Bulgarian Association for Alternative
Tourism

Second day

8.00 – 9.00	Breakfast
9.00 – 13.00	Visit the town of Soufli, traditional centre of the silk trade, with an interesting silk museum. Then visit the church of Saint George and admire the wooden temple. Shopping at the market of Soufli
13.00 – 14.30	Lunch
16.30 – 18.00	Visit the monastery of Dadia
20.00	Dinner

Third day

8.00 – 9.00	Breakfast
9.00 – 13.00	Visit the Byzantine castle of Didimoticho
13.00 – 14.30	Lunch
16.30 – 18.00	A visit to the church of Panagia Kosmosotira in Ferres and then you can visit the information centre of the Evros River Delta
20.00	Dinner

Prices are moderate, in fact quite low by European standards, as can be seen below :

Accommodation Type (Rates per Room per night)	Low Season	High Season
	Euros	Euros
Single	25	30
Double	36	40
Triple	43	45
Rates include : Breakfast, Taxes		
Ecotours	Adult	Child
	Euros	Euros
Guided Visit to Dadia Forest Reserve – 1 hour	3	1.5
Visit includes : Bus Transfer, Guide, Use of binoculars, Use of telescope, Use of bird guides		

Responsible Tour Operators' Nature Package to Amorgos

This is one example of a nature package to a Greek destination, offered by a specialist UK company, called 'Responsible Travel'. This company only sells packages which are environmentally friendly and provide social and economic benefit for the local communities.

This extract from the Responsible Travel.com website shows the nature of the package :

"

"Greek Holiday : Nature Trail Amorgos"

Amorgos is quiet and remote. It is a spectacular island with rugged mountains, carpets of flowers, long sandy beaches and clear blue sea. Through various special interest programmes, clients get right to the heart of the island and its people.

The location provides opportunities for peaceful exploration.

The variety of sites and experiences are endless with excellent walking tracks available in the mountains and valleys that also provide a haven for anyone interested in either; photography, botany, painting or ornithology, giving them the opportunity to make the most out of their stay. Staying at this delightful hotel ensures you can

discover the Greece of old, and at the same time enjoy the comforts of life. The variety of activities and the charming hotel with its own unique taverna make these programmes an ideal holiday for those who enjoy the outdoor life. Island highlights include : an ancient working olive press, rare flowers and herbs, hidden coves, 5th Century BC ruins, magnificent mountains and long sandy beaches lined with tamarisk trees. Very few visitors to Amorgos get to see the most remarkable sites here, as they have to be visited by donkey, or on foot. It is quite extraordinary walking terrain but a local guide is essential. We take you where only the goat herds tread, and beyond.

The respected archaeologist, Dr Graham George, will be present in the mountains with us every day.

Itinerary

Day 1	Friday – Evening flight London to Athens
Day 2	Saturday – Transfer to the ferry for Amorgos, arrive at sunset
Day 3	Sunday – An introduction to the island and its people. The history of farming and the local communities
Day 4	Monday – A gentle walk at the other end of the island through valleys with springs and flowering oleanders. A guided tour of the 5 th BC ruined city of Minoa accompanied by an archaeologist. A visit to the picturesque port of Katapola
Day 5	Tuesday – A short walk with spectacular views along the spine of the island. An opportunity for the more intrepid to drop down to the uninhabited south side of the island and snorkel in the deep blue water famous for the film ‘The Big Blue’. Caves and arches house many kinds of fish and colourful plant life
Day 6	Wednesday – Free
Day 7	Thursday – Explore the slopes of the highest mountain in this alpinistic area of Amorgos. Visit a remote 4 AD monastery with Spectacular frescos from the period. With the help of a geologist Search for bauxite and crystal deposits and study the cliff structures
Day 8/9	Friday / Saturday – Free
Day 10	Sunday – Visit the renovated ancient village of Stroumbos. Hear how the three only residents live without water, electricity, phones or a road. See how this programme is run from an office there!
Day 11	Monday – Drive to the famous monastery of Hozoviotissa that hangs from a cliff. Enjoy the monk’s hospitality. Tour the capital city of Hora and have a guided tour of the archaeological collection
Day 12	Tuesday – Go down to a hidden cove where a WW11 British commando vessel hid during the war. Hear how the islanders managed during the occupation and visit ruined farmsteads that enabled them to be self-sufficient at that time
Day 13	Wednesday – Free
Day 14	Thursday – Go on a fascinating short cruise around the islands of the ‘Small Cyclades’ Arrive in Naxos for an afternoon and evening of exploration around this spectacular Venetian city
Day 15	Friday – Leave Naxos on a high-speed ferry to arrive in Athens in time for the evening flight back to London

Our clients are accommodated in a hotel that is **family owned** and one of the very few which supports the local community as a meeting place throughout the whole year. Tourist income gets invested straight back into the community. Clients are introduced to tavernas which are old and traditional but not normally used by visitors who are put off by the language barrier and unusual produce and customs.

We endeavour to employ local people wherever we can, even to the extent of using an interpreter if required. Whenever possible local agents are used for ferry tickets and local transport utilised for travelling around the island.

We are promoting the preservation and **renovation of old houses** rather than building new. Our office is in a renovated house with no water, electricity or road. Rainwater is collected and recycled, donkeys are used for transportation and the office is run by solar power. A new renovation is in progress using the old stone to rebuild and the traditional method of mud in place of mortar. The hotel has a borehole to avoid diminishing the very little water there is on the island. Waste is recycled; in the kitchen is a goat-food bin, a chicken-food bin and a donkey-food in. All animal droppings are put back on to the market garden and so the cycle continues.

Clients are provided with a comprehensive brief upon booking. Included in this is an explanation of **local customs and etiquette**, and visitors are briefed from the very first day on techniques to preserve water once on the island.

This kind of holiday is becoming increasingly popular in the UK and is a growing market which could be very attractive for Epirus.

The cost of this package which included people staying on the small island of Amorgos for 2 weeks, including flights, was around 1500 Euros in 2004, so this was not a cheap holiday.

Epirus could develop packages like this providing it ensured they were based on hotels that were environmentally friendly.

Milia Traditional Settlement, Crete

The Milia Traditional Settlement in Crete combines traditional architecture with environmental good practice to attract foreign tourists. Its website, which is excellent, describes it as "a cross between a Crete village, an ecological farm, and a mountain hostel.

It was created by two local young people using EU funds and private capital. There are now 12 rooms in beautifully restored stone cottages, with an emphasis on simplicity not luxury.

The website is very honest about both the good and bad points about the establishment as follows :

"Highs"

The seclusion, high in a wooded Valley. The views, flora and fauna of the surrounding hills. The serenity: no cars or telephones, just the wind in the trees and the mewing of buzzards. The delicious, organic creature home-grown food

"Lows"

The rooms are simple, especially the bathrooms. There is no phone line, limited electricity and unreliable mobile signal. The wood-burning stoves [for heating and hot water] are tiresome, but hopefully you're not here for the comforts. It's best in summer, as an escape from the heat and crowds – from Oct to April it can be rather cold and dark"

Great emphasis is made of the dining experience and its distinctiveness as can be seen from the following extract from the website :

You'll probably spend more time in the communal sitting-dining-room than in your bedroom – partly because it's brighter and more spacious than the bedrooms, and partly because of the excellent home-made food and drink on offer.

First off, the **drink** : sage tea, camomile infusion, mountain *Tsai* [an eastern Mediterranean herb of the siderites family, If you're interested] and good ol' Liptons and Nes are all freely available from a DIY honesty bar. Too healthy by half? Try a shot of *raki* [local gralppa] clinked with the true Cretan hospitality against the glasses of your hosts, and subsequently struck off your bill.

Now for the **food**. Seasonal vegetables, free-range eggs, healthy meat ... everything is grown on site, without pesticides or fertiliser, and served fresh.

A word of warning: as everything is grown locally or brought in from Chania, you should give plenty of warning about any special dietary requirements you may have.

..

A wide range of activities are available for guests including all kinds of walks.

Milia is open all year round with similar prices charged in all seasons.

People who work at Milia speak Greek, English, Russian, Serbian, and Bulgarian.

The price, including breakfast, per room is between 50 and 59 Euros, which is again low by European standards.

Milia is a high quality product which is in tune with the desire in the European market for simple, environmentally friendly experiences in rural areas.

The Bulgarian Association of Alternative Tourism [BAAT]

This voluntary organisation was created in 1998 and has become very successful and influential. It offers some interesting potential lessons for Epirus in a number of ways. For example, it :

- is a non-governmental organisation that brings together tour operators and the public sector, tourism and environmental interests, transport and accommodation operators, the food industry and the media
- encourages cooperation rather than competition
- has run training courses for mountain guides, local government officials, and entrepreneurs
- has participated in EU funded programmes on rural tourism, cultural tourism, and biodiversity
- was consulted by central government on the formulation of a new Tourism Law
- created a quality standard for Bulgaria providing good houses [B&B] accommodation, to ensure product quality
- developed a trail to promote traditional crafts in the Rhodopian Mountains
- made an inventory of the rural tourism product in the Bulgarian mountains
- undertakes consultancy products
- produces promotional material to promote 'alternative' tourism

The BAAT shows what can be achieved by a partnership of interests in a relatively short time.

Understandably, it is led by dynamic, enthusiastic people, and it has a permanent office in the capital, Sofia.

Bulgaria is an interesting comparison with Greece because :

- amongst foreigners it is best known for its coastal, beach tourism even though it has mountains and agro-tourism potential, like Epirus
- traditionally its international tourism has been dominated by high volume, low spending tourism, dominated by foreign tour operators

It is only just beginning, unlike Greece, to benefit from EU funding prior to its accession to the EU in 2007.

However, it has already attracted significant foreign investment in the purchase of holiday homes and self-catering accommodation for rent, in the rural areas and mountains. Since the end of communism, there is a new generation of dynamic, younger entrepreneurs who are still keen to exploit the market economy.

With political stability, rural tourism in Bulgaria is doing well at the moment, and for the foreseeable future, Bulgaria will offer interesting rural / mountain tourism experiences at very reasonable prices.

Bulgaria is starting to attract more and more Greek tourists who may increasingly find rural Bulgaria an attractive destination with its low prices, good traditional food, monasteries etc. It is already proving very successful at attracting German and British 'alternative tourists', people who might otherwise be coming to Epirus.

In Bulgaria, they use the term 'alternative tourism' in the way we might talk about 'ecotourism' in Greece.

Cyprus Villages Traditional Houses

Established by a dynamic, visionary individual entrepreneur, an economist by profession, in 1987, this company is now one of the leading players in agro-tourism in Europe.

The basic concept was refurbishing traditional houses in inland Cypriot villages and then renting them to tourists. However, the company has now expanded and broadened its activities and is an excellent example of 'sustainable tourism' / 'eco-tourism'.

Today, the company offers a broad range of products that offer great potential lessons for Epirus, including :

- a range of types of accommodation aimed at different levels of the market from 'simple, clean' village apartments to 'villas' with swimming pools, but all in traditional buildings, in villages

Here are some examples of the type of accommodation offered by the company :

1. **SIMPLE**
Simple, clean and inexpensive accommodation

CYPRUS VILLAGES offers you a choice of studios, 1 and 2-bedroom apartments with self-catering facilities, a well-equipped kitchenette, and central heating / air-conditioning upon request.

2. **VILLAGE APARTMENTS**

The lodgings are dispersed in different villages across the island. Each one of these villages has its distinct attractions and atmosphere, yet they all offer a heartfelt welcome to a lifestyle closely linked to nature and tradition. CYPRUS VILLAGES offers you a choice of studios, 1 and 2-bedroom apartments with self-catering facilities in a well-equipped kitchenette, and central heating / air-conditioning upon request. Notice the thick walls, small windows, stone or wooden staircases so typical of our island's architecture of yesteryear. On your veranda, patio or garden you can relax with a drink or a book any time of the day. In every village a swimming pool with sun beds is always within reach and reserved for our guests.

3. **VILLAS** **Villa Houses**

Our villa houses provide upgraded accommodation without relinquishing rural tranquillity and hospitality. The strikingly attractive restored traditional houses, furnished with comfort in mind, and decorated with charming Cypriot antiques and artefacts. CYPRUS VILLAGES gives you a choice of 2 to 4 bedrooms houses with or without swimming pool. All have either a balcony or a patio where you can relax in the sun. "

- a taverna in Tochni which also houses the office of the enterprise
- organised leisure activities such as horse-riding at a stables owned by the company, and bicycling. The following extract from the website illustrates these activities, as follows :

Horse-riding

Drapia Farm, a horse farm run by Marisa Potamini, is located in a valley about 2 km outside the village of Kalavassos. Surrounded by the lush greenery of orange groves, the farm is home to a total of 10 well groomed Arabians, Appaloosas, and Thoroughbreds that can be ridden in western and English style. Whether you are a novice or an experienced rider, Drapia Farm offers you the unique opportunity to enjoy the Cypriot countryside on horseback.

Riding lessons and 1 to 2 – hour trails for beginners will introduce you to the wonderful experience of horse riding, in a most inspiring environment.

More experienced riders can join us for half or full day tours as we ramble through a peaceful landscape dominated by fields and hills.

Rides and lessons can be booked in advance or upon arrival.

Drapia Ride

- Seven nights accommodation on half board basis
- Approximately 2 hours flexible riding daily for six days
- Transfers from and to Larnaka airport included
- Car required. See car prices on price list. Pre-booked taxi services to and from farm also possible for persons who do not wish to have a rental car
- Available all year round
- Activities [Optional]
- Multilingual guide [English-German-French]

Adventures on a mountain bike

Discover Mountain Biking – This half day adventure is customised to the riders' ability. Includes half day MTB hire, Helmet and Trail-kit and personal tuition from our guide. A great morning or afternoon to learn about the bikes, techniques and amazing fun that can be had on a mountain bike ride. Half day minimum 1 rider – max 6 riders.

Sunset Rider – This is a 2½ hour gentle late afternoon ride to a stunning viewpoint where our group will watch the sun sink behind the mountains; they then ride back to Tochni where dinner awaits at the tavern. Our support vehicle is on hand in case of any mishap that risks extending the ride into darkness. 2 to 3 hours minimum 2 riders – max 6 per guide

The Gutbuster – for those wanting the complete experience all in a day. Includes guided tour, MTB Hire, Trail Kit and Helmet. This ride has hard climbing, rattling descents and grins-a-plenty. Only one question – can you hack it. "

- providing opportunities for tourists to take part in various activities ranging from going out with fishermen to sea, to spending a day with a shepherd, and helping with archaeological excavations
- the company focuses on different products at different times of the year to meet the needs of different markets, so that seasonality is much less of a problem than for many other organisations
- the company works with specialised tour operators, and group organisers from Northern Europe, particularly in the off-peak season to attract special interest tourists

For example, Cypris Villages runs 'health and beauty being' programmes that incorporate holistic healing therapies. The 2004 programme included :

- Creating the Life you Desire – March – 8 days : 788 Euros
- Holistic beauty - March - 8 days : 1088 Euros
- Angel Healing - November - 8 days : 788 Euros

These workshops cover topics which are popular in the UK market

- the entrepreneur supervises the restoration of the houses to ensure the quality standards and maintains close contact with the owners of the properties they market but do not own, also to ensure quality
- the entrepreneur is extremely skilled at relationship marketing and this helps him achieve high levels of repeat business
- the company works closely with the government tourism organisation, the Cyprus Tourism Organisation [CTO], and is regularly visited by tour operators, and media people visiting the island as guests of the C.T.O.
- the entrepreneur understands the importance of 'memorable gestures' so guests can take oranges from the company's own orange grove free of charge whenever they like. They can also attend frequent Halloumi cheese making demonstrations
- the company uses experienced foreigners, as well as local people, to manage a business where most clients are foreign, as fellow foreigners understand their needs best

- the owner works extremely hard and is always thinking of new things to try, and keeps a close eye on the business every day
- The Company has its own website with separate pages for tourists and travel agents. Bookings can be made online, including packages with flights and car hire

This organisation illustrates the importance of entrepreneurs who have a good idea, put it into practice, understand their market, but are always looking to improve.

Gîtes de France

France is the pioneer of rural / agro-tourism worldwide and a major element of their strategy has been the 'gîte'. Created in the 1950s the 'gîte' is a rural building which is converted to private accommodation for tourists in the rural areas of France.

Some key points about gîtes in France, are that :

- They were the result of a central government initiative and the scheme is still managed by the public sector
- Public funding is available for the conversion of the properties but there are standards to ensure that the traditional nature of the building is conserved
- Gîtes are very popular; there are around 55,000 across France and, for the peak summer season, they are usually fully booked by the preceding Christmas
- Sales of gîtes amount to some 150 million Euros per annum
- Average stay is 1.5 weeks
- Gîtes are easy to book via local government agencies, by phone, fax, post or Internet; each department [like the Prefectures in Greece] has its own agency
- There is a well established quality classification system based on a potent rural symbol, an 'ear' of corn
- Over time, the standard of the gîtes has had to rise to meet the changing expectations of the market. Many now feature dishwashers and satellite television, and even swimming pools. They have needed to make this change to ensure they do not lose customers to the many privately owned cottages and villas in rural France
- Having originally been targeted at French people, gîtes have now become popular with people in the UK, Netherlands, and Germany
- Normally, a key aspect of gîtes is that they are owned by local people rather than absentee owners, and that tourists are welcomed by the owners not by a paid caretaker
- Clients tend to be families who are relatively affluent; around three-quarters of customers use gîtes for their holidays every year

- In recent years, the gîte concept has responded to the growth of niche markets so there are now different types of gîtes aimed at different markets, such as horse-riders, fishermen, and wildlife watchers. There are even gîtes for children who holiday there, separate from their parents, and learn more about farming and rural life
- The 'Gîtes de France' logo is very well known in France and is becoming increasingly well known in Northern Europe
- Client can be booked through central booking agencies run by local government organisations

Gîtes offer a very popular form of accommodation – self catering in old rural buildings with character – that is very popular in Northern Europe, at a reasonable price. The cost of a gîte for a family in the peak season will range from around 300 to 1200 Euros, generally.

However, for such rural self-catering to be successful as it is in the case of gîtes in France, the country needs to have :

- Good, interesting food shops and markets where tourists can enjoy buying the food they will cook for themselves
- A supply of older buildings which are no longer required for permanent residents / farming

Finally, the gîte season has traditionally been short, reflecting the situation in the French holiday market. However, to extend the season, many gîtes offer special weekend breaks to attract out of season tourists.

Royal Society for the Conservation of Nature, Jordan

There are also excellent examples of ecotourism that are relevant to Epirus outside Greece.

For example, in Jordan, there is the Royal Society for the Conservation of Nature [RSCN], a non-governmental organisation dedicated to managing nature reserves in Jordan. It also acts as a lobby group on environmental issues and provides environmental education for young people.

At the same time it tries to bring social and economic benefits for local people, who are trained to operate tourist accommodation, produce souvenirs, and act as guides for tourists.

The RSCN runs its own simple but distinctive accommodation in its nature reserves such as the excellent Wadi Dana Reserve, which has the following 3 units run by th RSCN :

"

Rummana Campsite. There is an entrance fee [3 to 5 JD] and tents, mattresses and blankets are available for hire [additional 5 JD for up to four persons]. There are toilets and [cold] showers, and camp meals can be arranged [eg. breakfast 2 JD, evening meal 5 JD]. The area is open from 1 March to 31 October, except noon.

Feinan Campsite. A more basic camp is located close to the ancient copper mines at Feinan, in Wadi Araba. Tents, water and a kitchen are available. Access is from Qurayqira farm on a rough track suitable for 4WD vehicles only. The camp is open all year, but is closed on Tuesdays. Prices are the same as Rummana.

The **Dana Guest House** is perched on the edge of Wadi Dana next to Dana village. It offers accommodation for up to 20 people in nine rooms, most of which have private terraces overlooking the wadi. Bed and breakfast prices range from 10 to 35 JD per person, dependant on season and occupancy per room. Other meals are available by arrangement. The Dana Centre, adjacent to the Guest House, sells organically produced foods and highly original gifts made by the villagers.

Please note that 1 JD [Jordanian Dinar] is equivalent to just over 1 Euro]

The RSCN also recently opened a luxury tented camp accommodation operation at its Mujib Reserve, by the Dead Sea, with the following features :

Mujib Reserve Campside – The Dead Sea Retreat

Situated on the shore of the Dead Sea, this campsite offers stunning scenery and the chance to experience the unique sensation of floating in the saltiest sea on Earth. There are 15 deluxe four-person tents sitting among shrubs of tamarisk, insulated from the extremes of heat and naturally ventilated through their special design. They have simple beds over polished concrete floors and bed linen is provided, as well as moveable curtains inside. Above each tent there is a large sunshield made of cloth, giving the whole camp a special feel. The tents, which are spread along the shore, have individual terraces giving each a direct access to and view of the sea.

Toilets and showers are in a separate complex and there are additional free-standing showers on the shore to wash off the salt after swimming in the camp's private beach.

The restaurant which is near the tents on the shore of the Dead Sea serves traditional light food inspired by Gallayeh [baked tomato dishes]. It also serves grilled fresh fish with salads and stir fries.

RCSN Brochure

Guests at this accommodation and all other visitors to the Reserve are encouraged to follow a code of practice which includes the following features, according to the RSCN brochure for the site :

Code of Ethics

Protect all nature, no hunting or collecting of plants, animals, rocks or artefacts or firewood

Camp and climb only in the official sites

Avoid damaging trees and shrubs, and do not add graffiti

Take your litter away, keep the area clean

Respect the lifestyle of the local people and ask before taking pictures

Water is a scarce resource, please use it efficiently

Swim only in approved areas, accompanied by an RSCN guide. Children under the age of 16 are not allowed to swim in the rivers and pools. Inexperienced swimmers over 16 must use a life-vest

The RSCN employs travel industry experts and works with both local travel agencies and foreign tour operators to promote the RSCN nature reserves and tourist enterprises.

British Tourist for Conservation Volunteers Conservation Holidays

The British Tourist for Conservation Volunteers [BTCV] in the UK organises holidays where tourists pay money to take holidays on which they take part in conservation work.

In 2004, the BTCV organised such holidays to some 25 international destinations. These conservation holidays were promoted with suggestions that the main reason to take these holidays was to gain a real insight into local culture by working alongside local volunteers to help them improve their environment.

One of the BTCV projects and destinations for BTCV holiday clients was Gömörszölös – a 'sustainable village' in Hungary.

Their website offers the experiences of the BTCV leader for a conservation holiday to this village, Lara Herbolzheimer, who describes her experience as follows :

"

Being, for the first time, the leader of an International Conservation Holiday, I was obviously a little apprehensive about leading the Gömörszölös project in north-eastern Hungary this summer, but was also very excited to lead a holiday which I felt fitted my principles on tourism. I was looking forward to seeing at first hand the concepts of rural sustainable development being put into practice.

Little did I know that the Gömörszölös project was going to be such a success! A great, enthusiastic group made it a fun, interesting and easy project to lead. One participant had even come all the way from Japan. We all learnt a lot about Hungarians; their traditional food, how to eat well from fresh organic local food, Hungary's economic and social situation [especially a year before joining the European Union] its history, traditions, and music. We learnt why a sustainable village like Gömörszölös was an important success project that could help the poor regions of Hungary and also how to live in a community where stress is not needed. I think we all felt like different people.

It was wonderful to share 10 days with the villagers, who made us feel very welcome. It is such a different lifestyle from our usual urban pace of life. There was a general peace among the village and the hills that I had never experienced before. The church clock's time had been painted in to symbolise that time was not as exact there; it comes with the seasons, not as minutes. The strong community life was very special too.

The actual work was also an experience. Scything was very satisfying and almost addictive! The whole group worked so well. Tamas, the Hungarian leader, could go and do other little jobs he normally didn't have time to do on the orchard.

Managing the grass under the orchard was necessary to revive the richness of the flora since the orchard had been abandoned. Extra income would be provided for the villagers thanks to our work making hay barrels and picking plums to make their lethal plum brandy – even though we must have eaten at least a couple of kilos between us all! The work was for all a really social experience – without the effort of each and every one of us it wouldn't have been possible. It also felt like going back in time, all we needed was a horse rather than a tractor.

The extra bonus of the holiday was that after a lovely Hungarian lunch, we would have more creative activities to take part in like felt-making, honeycake-making, honey

tasting, archery and so on to complete the day, making it a fully relaxing and fulfilling holiday for everyone.

Tamas and his colleague Imbre were great and loved by everyone. Gömörszölös was a very special place. It felt like being at the end of the world in another time. It was inspirational and made me open my eyes to a lot of things that I don't notice back at home. I am sure all the others felt the same and had a wonderful time. We were all sad to go home. "

More and more Europeans, particularly Britons, like to take these conservation holidays.

There is great scope in Epirus for such conservation projects, including volunteers paying to help to :

- Clear footpaths and establish walking routes
- Restore traditional buildings
- Carry out surveys of wildlife
- Restore or create wildlife habitats
- Clear garbage from beauty spots

Carpathian Large Carnivore Project, Romania

This project, created in 1993, is a major conservation project for large carnivores – wolves, bears, lynx – in the Carpathian mountains. It has tried to improve relations between these animals and the local farming population.

However, it has also tried to help bring economic benefits to the local community by developing ecotourism based on these creatures and their attraction for tourists. The project website gives details of the ecotourism programme, as follows :

"

The Programme

In 1997 we decided to develop the ecotourism programme "Wolves, Bears and Lynx in Transylvania". This programme is based on organised group travel in cooperation with western travel agencies and local services. Between 1997 and 2003, over 3,000 visitors have visited the area through the programme. Currently, the offer consists of hiking and riding holidays, typically between one and two weeks. Groups are based in local, private and clean guesthouses with double or single rooms, owned and ran by Zarnesti families. They serve local food and Romanian specialities. Specific wishes [eg. vegetarian] are no problem. Groups are transported from and to Bucharest with new mini-buses, much of the local transport is done via horse-carts or with bikes from a local bike rental.

The travel agencies pay a donation for each visitor to the "Community Conservation and Development Fund". This Fund helps to improve the local infrastructure and financially assist conservation measures.

"

Some elements of the product are described below :

"

Nature

See the spectacular mountains of Piatra Craiului and Bucegi
Experience the wild ancient forests of Transylvania
Hike through deep canyons and see rare flowers and birds

Wildlife

Find signs of brown bears, wolves, lynx, red deer, and wild boar

Observe wild brown bears
See and experience our hand-raised solves

People

Meet with shepherds and farmers
Go the old way with horses and carts
Enjoy a roasted lamb over a traditional campfire "

Project Website

It appears that the project is popular with tourists based on this letter from a travel agent quoted on the project website :

" ...and all our clients came back with excellent experiences and a very positive image of Romania. Many of them would have never found the way to Romania if it would not have been for the large carnivores, but once being there, they saw the beauty of Romania and the friendliness of the Romanians. So they keep coming back and are regular repeaters..." "

Again, projects like this could be developed in many parts of Epirus from the mountains to the coastal wetlands.

UK Specialist Tour Operators

As Epirus needs to attract foreign specialist tour operators if it is to fully develop its tourism industry, the author felt it would be valuable to include a case study of UK specialist tour operators. This should help the tourism industry in Epirus understand the product these tour operators offer and what their market wants.

We will begin by looking at the members of the Association of Independent Tour Operators [AITO], the organisation which represents most specialist tour operators in the UK.

Firstly, its 2004 membership directory noted that :

- Of the 149 member tour operators featured, no fewer than 31 or 21% offered holidays in Greece
- Fifteen AITO members specialised wholly or partly in holidays to Greece
- Most of the Greece specialists featured island destinations rather than mainland destinations
- Of the 31 operators who featured Greece, around a half specialised in beach holidays
- Operators offered a wide range of special interest holidays to Greece, including the following special interests –
 - archaeology [10 operators]
 - walking [14 operators]
 - cycling [2 operators]
 - Byzantine culture [2 operators]
 - Architecture [7 operators]
 - Sailing and boating [5 operators]
 - Photography [4 operators]
 - Butterflies [5 operators]
 - Bird-watching [5 operators]
 - Military history [1 operator]
 - Painting [4 operators]

- Gastronomy [2 operators]
- Health and beauty [2 operators]

Of the 15 operators who specialised in Greece, only 1 claimed in the editorial in the brochure to feature Epirus, and that was restricted to Zagoria.

Consumers in the UK, particularly in the higher price, higher quality end of the market are increasingly demanding higher standards of practice from tour operators. The Association of Independent Tour Operators sets out a series of standards which its members are required to maintain, as follows :

"

THE ASSOCIATION OF INDEPENDENT TOUR OPERATORS

AITO is the Association for independent and specialist holiday companies. Our member companies usually owner-managed, strive to create overseas holidays with high levels of professionalism and a shared concern for quality and personal service. The Association encourages the highest standards in all aspects of tour operating.

EXCLUSIVE MEMBERSHIP

AITO sets criteria regarding ownership, finance and quality which must be satisfied before new companies are admitted to membership. All members are required to adhere to a Code of Business Practice which encourages high operational standards and conduct.

FINANCIAL SECURITY

AITO members are required to protect money paid by customers to the member for any holiday sold under the AITO logo and to comply with UK Government Regulations in this respect. Members submit details of their bonding and guarantee arrangements to the Association on a regular basis.

ACCURATE BROCHURES AND WEB SITES

All members do their utmost to ensure that all their brochures and other publications, print or electronic, clearly and accurately describe the holidays and services offered.

PROFESSIONAL SERVICE AND CONTINUAL IMPROVEMENTS

All members are committed to high standards of service and believe in regular and thorough training of employees. Members continually seek to review and improve their holidays. They listen to their customers and always welcome suggestions for improving standards.

MONITORING STANDARDS

AITO endeavours to monitor quality standards regularly. All customers should receive a post-holiday questionnaire, the results of which are scrutinised by the Association.

RESPONSIBLE TOURISM

All members acknowledge the importance of AITO's Responsible Tourism guidelines, which recognise the social, economic and environmental responsibilities of tour operating. Those demonstrating their achievements beyond the pure acceptance of this principle are recognised by the award of 2 or 3 star status.

CUSTOMER RELATIONS

All members endeavour to deal swiftly and fairly with any issues their customers may raise. In the unlikely event that a dispute between an AITO member and a customer cannot be settled amicably, AITO's low-cost Independent Dispute Settlement Service may be called Upon by either side to bring the matter to a speedy and acceptable conclusion.

"

Entrepreneurs in Epirus who want to do business with foreign specialist tour operators need to recognise that these operators are dealing with demanding clients and have to meet the standards outlined above.

The author believes it might be helpful to say a little about the programme offered by the one AITO member specialist Travelux, which featured Epirus in its brochure.

In 2003, Travelux published a 64-page glossy colour brochure which featured just 2 Greek destinations, Lefkada and Zagoria. The company specialises in villas with pools, and described itself as “the exclusive villa specialist for Greece”.

Sixteen pages of the brochure featured Zagoria specifically, including beautiful photographs and lots of information for their company’s discerning clientele.

The only accommodation in Epirus offered by Travelux, was as follows :

- Saxonia Hotel, Megalo Papingo
- Orestes House, Ano Pedina
- Papaevangelou Hotel, Megalo Papingo

For these hotels, they offer a lot of detail about the properties and the people who own them. They also stress their small size and human service.

The company offers painting, photography, and walking holidays in Epirus and provides fly-drive packages for clients. Sample prices in 2003 were as follows :

- 7 nights fly-drive at a hotel in Zagoria including accommodation, flight and car, for 2 adults sharing a room ranged from £563 to £594 [780 – 830 Euros]
- 7 nights walking holiday, £817 [1140 Euros]
- 7 nights photography holiday £923 [1300 Euros]

Interestingly, the season for these holidays ran from 7 May to 15 October, and the flights were based on charter flights to Preveza [Aktio] airport.

Destination Marketing ‘Clusters’ in the UK

The concept of ‘clusters’ is highly developed in the UK in the field of tourist destination marketing. It takes different forms including the following :

- public-private sector partnerships between local government and entrepreneurs in an area, to market the destination
- entrepreneur clusters of tourism businesses in an area including hotels, restaurants, visitor attractions, inbound tour operators
- entrepreneur clusters where all the businesses are in the same sector of tourism such as hotels or museums or outdoor activity organisations
- thematic clusters including both tourism and non-tourism entrepreneurs such as a gastronomy cluster

However, whatever the nature of the cluster, the aim is the same, namely, to share expertise and resources for mutual benefit.

Most clusters have a marketing focus but they can also concern themselves with training, purchasing, and quality standards.

The cluster can be an informal grouping or it may be a legal entity as a private company limited by guarantee.

The funding of clusters and their activities can come from a variety of sources, namely :

- annual subscription fees paid by members
- annual grants provided by local or central government
- commission on bookings generated for members by the cluster organisation
- other trading activities in which the cluster takes part

Staff may be seconded from local government to work for 'clusters' or they may be employed and paid for by the cluster members directly.

Most clusters have a management structure with representation from all members.

The turnover of 'clusters' can range from a few thousand to several million Euros.

Clusters may become involved in a wide range of projects including :

- joint packaging of the product for tour operators
- attendance at trade fairs
- production of brochures
- provision of information for tourists
- marketing research
- familiarisation visits
- mailshots to tourists, tour operators, and journalists
- joint sales promotions

Clusters are a vital ingredient in successful destination marketing but they are difficult to set up and manage.

WWF [Worldwide Fund for Nature] Guidelines for Community Based Ecotourism Development

This respected international organisation has developed guidelines for ecotourism development in tourist destinations.

These were published in a report in 2001 produced on behalf of WWF by UK consultants The Tourism Company.

As well as putting forward some general guidelines for successful ecotourism, the report offered some interesting non-European examples of ecotourism projects around the world, that were designed to benefit local communities.

Details of three of these projects are highlighted below, taken from WWF International 'Guidelines for Community-Based Ecotourism Development' 2001 :

"

Brazil is witnessing an explosion of interest in and international funding for ecotourism. Although this may promote conservation in a country where environmental awareness is still very low, it also poses a threat of uncontrolled tourism with serious impact on natural habitats. WWF-Brazil has therefore instigated a programme of capacity building and awareness raising at a local and national level, to promote a form of ecotourism that is community-based and well regulated.

Components of the programme include :

- proposing and testing a training methodology for community-based ecotourism, based on eight pilot projects which are diversified in terms of ecoregion and type of ecotourism;
- producing a training manual and preparing trainers to multiply the methodology in different regions of the country; and
- working towards the development of a certification system for ecotourism at a national level.

Training has been aimed at the conservation and business sectors. A modular Approach has been adopted, involving workshops every six months and, in the time Between them, direct technical assistance to projects in the field. The workshops Are participatory and the practical experience of the trainees is used to improve the Methodology. Lessons learnt include the need for technical staff and not just a manual to help grass-roots organisations, and the need for sufficient time [two years] for consultation and research when initiating ecotourism with a community.

In **Sabab**, WWF-Malaysia, with assistance from WWF-Norway and the Norwegian government, has been working with the local community in the village of Batu Putih, on the lower Kinabatangan river, on a model ecologically sustainable community tourism project [MESCOT].

This area has seen considerable loss of natural habitat through the expansion of oil palm plantations and logging. MESCOT aims to create an alternative sustainable source of income. The villagers themselves recognised the potential for ecotourism and approached WWF for guidance.

The model has sought to achieve a broad involvement of villagers in ecotourism, so spreading benefits and awareness of conservation issues. An initial period of close consultation led to identification within the community of the skills they would need to develop a successful project. These skills, which include hospitality, finance, marketing, computer skills and basic English, have been developed over time.

The first element of the tourist offer to be established was homestay accommodation. Over 800 bednights were achieved in the first six months, which is a small but significant beginning, with a high proportion of income retained in the community. Care has been taken to record feedback from visitors and tour operators and to build on this.

Marketing will remain a challenge. Forging external links with tour operators and others has been important here. Stimulated by MESCOT, a State Ministry of Tourism Homestay Development Unit has become more active in the development and promotion of the product.

MESCOT has led to heightened concern about the dwindling forest resources in the area. The development of interpretative trails by the local community has raised their interest and awareness of the richness of the biodiversity. Participation in tourism has encouraged clearance of rubbish, local landscape improvements and a forest rehabilitation programme, sometimes involving visitors themselves.

The **Arctic's** large wilderness areas and unique communities are attracting increasing numbers of tourists. More than a million people visited the Arctic in 2000. While the increase in Arctic tourism poses threats to the region's sensitive environment, it also presents opportunities to educate visitors about the Arctic, create greater global awareness of the region, and increase the share of tourism revenue that goes to Arctic communities.

WWF's Arctic Programme started an Arctic tourism project in 1995, hoping to influence the development of tourism in the region. WWF assembled a broad group of tour operators, conservation organisations, nature managers, researchers and community representatives. Together the group drafted Ten Principles for Arctic Tourism and practical codes of conduct for tour operators and tourists.

The codes cover issues such as minimising resource use and other impacts, awareness-raising, support of conservation, relationships with communities and safety guidance. They have been translated into a variety of languages and widely distributed.

In order to publicise and encourage adherence to the codes, WWF gives an annual award to the individual, business or organisation working in tourism whose innovative and successful efforts result in the most benefit to the Arctic. The 10 principles are used as criteria for the award. Recently, WWF, the State of Alaska and the Alaska Wilderness Recreation and Tourism Association [AWRTA] initiated an Arctic tour operator accreditation programme, also based on the 10 principles and codes of conduct.

”

While these examples come from places distinct and very different from Epirus, they are relevant and could offer lessons for Epirus.

Conclusions to the Case Studies

We have looked at a range of case studies that is varied and diverse but some general conclusions can be drawn about the lessons they may offer for Epirus.

They seem to indicate that successful ecotourism depends on the following factors :

- The need for innovation, for offering something different for the tourist and being creative
- The importance of partnerships between the public and private sector in the destination and between the local tourism industry and foreign tour operators
- The existence of a body of dynamic local entrepreneurs and community leaders prepared to try new ideas, take risks, and operate professionally
- The exploitation of trends in the international tourism market such as conservation holidays, health and well being and wildlife watching
- The use of the Internet with both websites and online booking facilities
- The active involvement and support of the local communities so that tourists receive a warm welcome from local people
- The importance of offering consistently high quality standards in all aspects of the product
- The creation of unusual, rural, environmentally friendly forms of accommodation. Tourists will pay a high price for a product that is unusual or unique
- Successful ecotourism is an all year round phenomenon, involving different products for different markets in each different season
- Foreign specialist tour operators, notably those from the UK, currently do not really focus on the Greek mainland, and Epirus specifically
- Successful ecotourism must involve, and benefit, the local community as a whole

STRATEGY FOR DEVELOPING TOURISM IN EPIRUS including pilot actions and potential regional initiatives

Introduction

We have now :

- Analysed the current situation of tourism in Epirus
- Identified and evaluated the competitors for Epirus
- Examined a wide range of case studies which offer lessons which are relevant to Epirus

It is now time, therefore, for the author to put forward concrete proposals for tourism in Epirus.

Throughout these proposals, the emphasis will be upon Innovation which is crucial if Epirus is going to succeed in the very competitive international tourism market.

It is also important to see these proposals as interrelated rather than separate.

These proposals should be seen as the first steps in a process, not as an end in themselves.

The proposals cover the outcomes identified in the terms of reference of the project, but have been interpreted by the Project Coordinator as follows :

- the need for the creation of some form of regional tourism organisation which now seems to have been accepted by most people and organisations in Epirus
- a five year outline marketing strategy for Epirus
- the development and support of tourism 'clusters'
- e-commerce in tourism
- education and training
- the potential for new tourism business
- the specification for a business plan competition
- regional support mechanisms for tourism enterprises
- guidelines for successful tourism enterprises

Before we outline the proposals in detail, we should begin by identifying the main goals for tourism development in Epirus, as follows :

- (i) to attract relatively high spending foreign and Greek tourists who respect the local environment and culture
- (ii) to ensure that the benefits of tourism are spread as widely around the local population as possible
- (iii) to manage the tourism effectively so it does not damage the physical environment or the local society
- (iv) to maintain local control of the tourism product and how it is marketed rather than letting externally-based organisations take control
- (v) to encourage cooperation between local enterprises and between the public and private sectors to ensure that the region is marketed as effectively as possible
- (vi) to offer the tourist a good quality experience at a price which is fair and represents good value for money
- (vii) to encourage tourists to become regular visitors to the region
- (viii) to allow tourists the opportunity to experience new things and learn about the uniqueness of the region
- (ix) to recognise and meet the different needs of different types of tourists

- (x) to involve as many local people as possible in welcoming the tourists
- (xi) to use specialist forms of tourism to extend the season and bring business in the quieter months
- (xii) to use tourism to help conserve traditional ways of life, such as craft products and traditional food and drink
- (xiii) to protect the uniqueness of the region and resist the trend towards homogenisation that has affected some rural regions

The Prognosis if these Proposals are not Implemented

We will shortly begin to outline the proposals and recommendations of this project report. However, before that, the author believes it is important to look at what will happen with tourism in Epirus if these proposals are not implemented effectively. The author believes that if the recommendations are not implemented the following will happen :

- tourism will grow in the best known areas of Epirus such as Zagoria and Metsovo, perhaps too rapidly so they become overcrowded
- the majority of the region will continue to under-perform against its potential, in tourism
- the region will lose out to competition in Greece and South-East Europe in the markets of ecotourism, adventure tourism, and cultural tourism
- investment in the tourism product will decline as EU funding is reduced
- per head tourist spending will continue to be relatively low
- length of stay will remain relatively short
- the tourist season will continue to be quite short
- there will be a lack of coordination in marketing between the public and private sectors that will reduce the effectiveness of marketing activity
- successful tourism clusters will not develop and survive
- while individual, dynamic enterprises will flourish, most will under-perform. This will mean a lack of 'critical mass' in most parts of the region as there will not be enough attractions to tempt tourists to visit most areas of the region
- people will rely on the Egnatia Highway to solve all the problems of Epirus on its own, which it will not.

So let us assume action will be taken and start with the first, and in many ways, most important proposal.

The Creation of a Regional Tourism Organisation

Tourism management and marketing is very fragmented in Epirus which means that the region lacks effective marketing and a clear identity in the market.

The four Prefectures are all working hard on tourism promotion but there is not enough cooperation and coordination between the Prefectures.

No individual Prefecture has enough attractions or a strong enough brand identity to attract foreign tour operators and tourists.

On the other hand the region of Epirus as a whole does have enough attractions to be a successful destination in the international market.

There is a need, therefore, for an organisation to coordinate the marketing of Epirus at the regional level. Such organisations exist in most other countries around the world.

The organisation could take a number of forms, notably :

- an informal organisation which meets several times a year to agree a marketing strategy for the region, or
- a formal organisation with its own office and budget

The author's view is that the latter is the best option but it is for the people of the region to decide which model best meets their needs.

The organisation would not conflict with the marketing activities already undertaken by the Prefectures. They would still continue to undertake promotional work for their Prefectures.

However, hopefully, they would find that in terms of marketing to international tour operators and tourists each Prefecture would benefit from a joint regional campaign, with money from all 4 Prefectures.

Whatever its form, the regional tourism organisation / committee should include representatives of :

- the regional authority, which is the only body which could take responsibility for setting up such an organisation / committee
 - the 4 Prefectures
 - the 4 Chambers of Commerce
 - EOT
 - hotel representatives
 - restaurant representatives
 - activity organisers
 - museums
 - inbound tour operators
 - car hire companies
-
- airlines
 - ferry companies
 - KTEL bus company
 - retailer representatives
 - the media

It remains the author's view that such an organisation / Committee is a vital pre-requisite to the successful future marketing of Epirus as a tourist destination.

In the longer term, it remains the view that Epirus will need a strong regional tourism organisation to help develop tourism.

This organisation would complement rather than replace or compete with the work of the 4 Prefectures.

If the region did want, in the future, to develop such an organisation, here are some ideas concerning how it might operate.

The regional tourism organisation would be responsible for the following :

- preparing a five year marketing strategy, and one year tactical marketing plan, for Epirus as a tourist destination. The Region and Prefectures would put all or some of the money from their marketing budgets into the implementation of these strategies
- creating a single brand identity and logo for the Epirus region as a whole
- operating a network of professional tourist information centres like those in France and the UK, in tourist 'gateways' such as ports and airports and in popular tourist destinations such as Ioannina and Metsovo
- operating a website for the whole region
- coordinating a programme of press and public relations for the region
- coordinating familiarisation visits by tour operators and journalists
- developing quality standard for tourist enterprises in the region
- taking a lead in education and training for the tourism industry
- providing advice and support services for tourist enterprises

At the beginning, the organisation would need to be funded by the public sector. However, by the end of the first five year strategy, it should have aimed to achieve financial self-sufficiency. Its income should ultimately be based on its activities rather than on public sector subventions.

Its income could come from :

- membership fees paid annually by members
- sponsorship from 'partners'
- commission generated from bookings made through the organisation
- funding from enterprises to take part in specific major promotional activities such as attending trade fairs in foreign countries
- income from the sale of souvenirs and publications in tourist information centres
- consultancy work carried out for other destinations

It would then have its own staff and offices and be quite autonomous on a day to day basis, although still responsible to a management committee made up of representatives of its members. The new regional tourism organisation's main task

would, of course, be the development and implementation of a five year tourism marketing strategy for Epirus.

A Five Year Marketing Strategy for Epirus

The effective development of tourism in Epirus in the future requires a five year strategy that can guide everyday marketing in both the public and private sectors. This strategy should be elaborated and coordinated by the regional tourism organisation recommended in the last section of this report. Here is the author's recommended strategy for Epirus for the next five years :

1. A single clear brand identity and logo should be created for Epirus as a region. The design of the logo should allow for sub-titles to be added to it, under the main logo, for different geographical areas or types of tourism, eg. Epirus – Metsovo or Epirus – Gastronomy, for example.
2. The ecotourism / travel trade manual produced by BIC Epirus and John Swarbrooke in 2000 should be updated and expanded, to help attract tour operators to Epirus. It should be updated annually and should be translated into English, French, Dutch, German, and Italian.
3. The development of an Epirus Tourism website with links to the websites of Prefectures, Chambers of Commerce, and individual entrepreneurs. This website should have an e-booking facility by the end of the five year strategy period.
4. The creation of a central database of Greek and foreign tour operators and travel journalists. This would then be used for regular mailshots announcing new products or packages, infrastructure developments, and so on.
5. The development of a press and public relations unit charged with sending out press releases to the travel media promoting Epirus.
6. The creation of a programme of familiarisation visits for selected travel journalists.
7. The development of a programme of familiarisation for selected foreign specialist tour operators, starting with those from the UK and Germany, and then the Netherlands and France, and finally Italy and Scandinavia.
8. The generation of new products and packages to exploit market opportunities. These opportunities include the following :
 - fly-drive packages for independent travellers arriving via Ioannina and Preveza [Aktio] airports
 - one-day 'adventures' [white water rafting, climbing, trekking, paragliding etc] for those staying in the coastal resorts such as Parga and Sivota, as well as Corfu
 - two centre beach and mountain packages covering the coastal resorts and the mountain villages
 - packages designed for those using the Egnatia highway

9. The creation of a network of tourist information centres, coordinated centrally, providing information and offering an accommodation booking service for tourists. These centres should be located in the old port of Igoumentsa, Aktio Airport, Ioannina Airport, and Metsovo, for example
10. The development of tourist information points, with displays, giving details of local town businesses, at key points on main roads through the region.
11. The opening of 'Epirus Shops' in Athens and Thessalonika, providing tourist information on the region and selling local products.
12. The representation of Epirus at major specialist tourism trade fairs and exhibitions around Europe. However, the Epirus stand will need to have concrete products to sell and should be staffed by specialist staff skilled in sales and marketing. The focus should be on specialist trade fairs not the large mass-market trade fairs.
13. The development and encouragement of tourism clusters of businesses in local areas and with particular themes such as adventure or gastronomy. These clusters could then be represented at the trade fairs.
14. The promotion of existing traditional events and festivals together with the creation of new events designed to attract special interest tourists in the off-peak season, such as a walking festival, food and drink festival, and an adrenaline sports week'.
15. The creation of a cultural tourism strategy designed to improve the quality of the culture and heritage product in the region. This strategy should cover :
 - better interpretation and visitor facilities at sites such as Dodoni and Nikopolis
 - a new living history museum telling the story of emigration and the lives of the emigrants
 - a 'museum passport' for Epirus offering discounts to tourists who visit a number of museums
 - a series of thematic trails, by car, cycle, or foot, on themes such as food and drink, crafts, Byzantine monuments, and nature
16. The development of an education and training strategy to support the tourism industry and enhance customer service. This needs to encompass public officials involved in tourism marketing, entrepreneurs, as well as young people wanting to develop a career in tourism. It needs to be designed to be continuous and to affect as many people as possible.
17. The creation of an ecotourism quality label or standard for Epirus, together with a mechanism for implementation and ensuring compliance.
18. The introduction, by the end of the five year strategy period, of an 'Epirus Card' a scheme offering discounts on attractions and tourist facilities. This encourages higher spending by tourists.
19. The generation of an 'Epirus First' scheme for first time visitors to Epirus, offering them a little gift to encourage them to visit again.

20. The creation of an 'Epirus Friend' scheme offering incentives for tourists to recommend a vacation in Epirus to their friends and relatives.
21. The development and packaging of three product areas where Epirus has great potential, namely :
 - Gastronomy, including retail outlets, visits to producers, cookery classes
 - Nature including nature reserves, visitor centres, specialist guides, and guidebooks
 - Health and wellbeing, with spas, treatment centres, organic food, and the creation of natural health products for sale
22. The elaboration of an 'Epirus in Winter' campaign covering winter sports and romantic short breaks in the mountains.
23. The further development of a network of footpaths and the production of accurate maps and guidebooks for them.
24. The creation of a marketing research unit for the region which would :
 - collect and disseminate data on the tourism market in Epirus
 - coordinate a customer satisfaction initiative with a standard questionnaire for all tourists covering all aspects of their visit to Epirus
 - research potential future markets for Epirus such as Asian markets and Eastern European markets
25. The promotion of particular areas of the region which are currently under-marketed, including :
 - Ioannina, as the capital of the region, which is now a good quality destination that needs a stronger brand identity of its own
 - The mountains and wetlands of the Arta Prefecture which are of a very high standard
 - The coastal resorts and beaches of both Thesprotia and Preveza
26. The elaboration of a strategy for attracting the domestic market to Epirus, all year round, focusing upon :
 - Business travel, particularly small conferences and incentive travel
 - Environmental education trips for school children and college students
 - Romantic, ecotourism, and adventure weekend breaks

The domestic market should be targeted through advertising and brochures, as well as attendance at tourism trade fairs in Thessaloniki and Athens. It could also be encouraged through the activities of the 'Epirus Shops' in Thessaloniki and Athens suggested in point 11 above.

27. The creation of a forum of experts to meet regularly and look into the future and suggest how Epirus should be marketed in the future.
28. The development of a system for monitoring the implementation of the strategy and evaluating the performance of the marketing of the region.

If this strategy is accepted, then detailed technical marketing plans will need to be drawn up each year.

Priorities for the First Year of the Strategy

It is important in the first year of the strategy to take actions which lay the foundations for the future marketing of Epirus. These priority actions should include :

- the creation of a regional tourism organisation as outlined in the previous section of this report
 - the creation of the Epirus brand identity and logo
 - the updating of the ecotourism / travel trade manual and its translation into English and German
 - the development of an Epirus Tourism website and the investigation of e-booking systems that could be adopted in Epirus
 - the first steps to setting up the central database with the details of leading European specialist tour operators and travel journalists
 - the establishment of a press and public relations team for tourism in Epirus
 - the development of the first tourist information centre, probably in Ioannina
 - the carrying out of feasibility studies for 'Epirus Shops' in Athens and Thessaloniki
 - the representation of Epirus at 2 specialist trade fairs, 1 each in the UK and Germany
 - the creation of a strategy for the improvement of the cultural and heritage products in the region, with concrete actions
 - the development of an education and training strategy, with concrete actions, covering entrepreneurs and public officials as well as young people, together with improvements to the provision at the TEI in Igoumenitsa
 - the elaboration of a quality label and standard for tourism in Epirus that can then be promoted
 - the planning for the introduction for the 'Epirus Card'; 'Epirus First'; and 'Epirus Friend' schemes
-
- the identification of simple packages for gastronomic tourism, health tourism, and nature tourism in Epirus
 - support for the recently created tourism 'cluster' in the region and the encouragement of thematic clusters in gastronomy / nature / health to support the packaging initiatives in the first year
 - the establishment of the marketing research unit for the region
 - the development of a promotional campaign for Ioannina, as the regional capital, including a brand identity and logo
 - the generation of a strategy for attracting the domestic market to visit Epirus
 - the creation of a system for monitoring the implementation of the strategy

The Development and Support of Tourism 'Clusters'

An excellent recent development in the region is the creation of the first tourism 'cluster' involving 35 local enterprises, including hotels, restaurants, activity organisers, and producers of local products. It is now established as a cooperative organisation, recognised by the law, with each enterprise contributing money, and

an elected management board. The 'cluster' is developing its marketing strategy currently and is setting its priorities.

It encompasses a large proportion of the Ioannina Prefecture from Konitsa to Metsovo via Zagoria and Ioannina.

Other enterprises have expressed a desire to join the cluster and the cluster, therefore, has to decide the extent to which it wishes to expand.

The region should now encourage and support this cluster because it will set a useful example for others and because these entrepreneurs deserve support for having the courage to be the first one.

There is still scope for the development of further tourism clusters that could work with the proposed regional tourism organisation to implement the regional tourism marketing strategy for Epirus.

There is scope for the development of different types of clusters, namely :

- area-based clusters, bringing together all the enterprises with an interest in tourism that are based in a particular geographical area. The priorities for such clusters could be Ioannina city, Preveza, Igoumenitsa, and the mountains of the Arta Prefecture
- sector-focused clusters, on a regional basis covering sectors such as transport, travel agencies, outdoor activity organisers, and restaurants
- thematic clusters, involving different types of enterprises with an interest in particular themes. The priorities for these themed clusters should be gastronomy, nature, health and adventure activities. These thematic clusters should be region-wide and draw their members widely. For example, the gastronomy cluster could include restaurants, food shops, food cooperatives, distilleries and wineries, and fishermen. The nature one could incorporate environmental education centres, nature reserves, expert guides, and the Bourazani environmental park, for example

An individual enterprise could belong to one, two, or all three different types of cluster simultaneously.

The clusters should also be given a formal role in the management of the regional tourism organisation and in the implementation of the regional tourism marketing strategy.

However, creating and sustaining tourism clusters is a difficult task because of the potential for conflict and disagreements over priorities and how to spend the marketing budgets.

The regional tourism organisation should put in place a range of initiatives to encourage and support new clusters, including the following :

- providing examples of how clusters work in tourism in other countries
- offering advice on different models for how to set up, organise, and manage clusters
- creating a simple manual, which can be updated, offering advice on the activities that should be undertaken by clusters and how best to do them
- bringing in outside experts to help the clusters develop their marketing plans
- running workshops on how to set up a cluster

- offering a limited amount of financial assistance for new clusters, providing that they produce a professional, sound business plan

To receive official recognition with the regional tourism organisation, any new clusters should :

- have a written set of objectives
- have at least six members
- include a commitment from all members to make a financial contribution to help fund the cluster
- have a central point of contact and named contact person
- have an outline business plan
- have some form of legal status as a cooperative or company

Clusters should endeavour to develop their own sources of revenue but they could also apply for funding such as the EU Leader Plus programme.

The clusters should undertake some or all of the following activities :

- setting up a website, featuring all the members which could then be linked into the proposed Epirus website proposed in the last section of the report
- developing packages and products to sell to foreign specialist tour operators via mailshots, familiarisation visits, and attendance or representation at trade fairs
- joint promotions promoting the products of all members of the cluster
- cooperating with the regional tourism organisation on the implementation of the regional tourism marketing strategy

New clusters will need the support of specialist organisations in the region which focus on entrepreneurship and innovation such as BIC Epirus and Epirus SA.

These organisations can also try to encourage the most dynamic entrepreneurs across the region to set up new clusters but, ultimately, the entrepreneurs themselves have to want to set up clusters and be committed to supporting and funding them.

E-Commerce in Tourism

E-commerce is now a vital element in the marketing of tourism products. It is particularly valuable for small and medium sized enterprises and newly emerging destinations trying to compete in the global tourism market with big companies and large, well established destinations.

E-commerce in tourism can take a number of forms including the following :

- e-booking, where clients can make reservations for all kinds of tourism products online without the need for faxes, letters, and telephone calls
- e-information and promotion, where websites are used to provide dynamic, permanently updated promotional material on enterprises and destinations
- e-management where computers are used to manage an enterprise, including financial transactions, stock control, staff records, purchasing and so on

- e-marketing where computer databases are used as a base for direct marketing campaigns by post or e-mail, to past, present, and prospective customers

In Epirus today, e-commerce is very little developed. Its weaknesses include :

- the lack of an up-and-running system allowing e-booking of accommodation including online payment
- the absence of an up-to-date region-wide tourism website promoting the whole of Epirus
- the generally poor quality of websites of those enterprises who have them and the lack of regular up-dating on most of them
- the time taken to reply to e-mails and the fact that sometimes e-mails are not answered at all
- the lack of knowledge about e-commerce of entrepreneurs and public officials in tourism in Epirus

There is a great need to develop the e-commerce capacity of the region's tourism industry through the following actions :

- exploring whether the prototype e-booking system which has been developed at the University of Ioannina has the potential to be developed into a practical working system. At the same time, e-booking systems elsewhere in Europe should be investigated to see if they could meet the needs of the Epirus tourism industry. Further discussions could also take place with the University of the Aegean to see if they could develop a workable e-booking system. However, it is important that a clear specification is developed for any system by tourism experts who know what works from the point of view of tourist and tourism enterprises, rather than being dictated by computer experts who do not understand tourism
- producing a simple manual helping entrepreneurs to understand e-commerce in tourism, including how to set up and run a website
- trying to increase the representation of Epirus on well established online e-booking sites such as Expedia and Dilos World
- encouraging IT students at the University of Ioannina to undertake work placements or vacation work, helping entrepreneurs develop and update their websites
- organising regular workshops on e-commerce for entrepreneurs and public officials
- appointing, in each Prefecture or area of the region, an e-commerce 'champion', an IT specialist, to help develop e-commerce in tourism in the area

Furthermore, it is important that tourism is included in IT initiatives taking place in the region which cover all industries. Tourism lends itself to the development of e-commerce and foreign tourists are increasingly using the Internet as their preferred method of buying tourism products. Epirus needs to ensure that it is in a position to exploit this market trend.

Education and Training

There is a well recognised need for education and training in Epirus to support the development of the tourism industry.

The regional authorities need to draw up an integrated strategy for tourism education and training in the region which addresses the needs of the following groups :

- public officials involved in tourism
- entrepreneurs
- managers
- employees

There needs to be an emphasis on education and training throughout careers, not just at the beginning.

In the first place, it is unfortunate that the University of Ioannina, which is a dynamic institution, does not have a department of tourism. This means a lack of university level education and research facilities in the region. This is in contrast with the University of the Northern Aegean, for example, which has an excellent reputation in the field of tourism education and research.

It is suggested, therefore, that consideration be given to establishing either a tourism department at the University of Ioannina, or at least, a network of staff with an interest in tourism research.

The only institution currently offering tourism and hospitality education in the region is the TEI Epirus at Igoumenitsa. Here staff are working hard to offer diploma courses for the industry. However, the institution is clearly under-funded with poor teaching accommodation and limited learning resources in terms of its library.

A substantial investment needs to be made to make this a major regional centre for practical, vocational tourism and hospitality training and education, or else a separate institution needs to be created to perform this task.

It is very important that young people wishing to enter the tourism industry are able to be educated locally or they will leave the region to study and never return.

Likewise, an attractive tourism education institution in Ioannina or Igoumenitsa could, potentially, attract students from elsewhere in Greece, who may then choose to stay on and work in the region.

However, perhaps the greatest area of education and training needed for the Epirus tourism industry is with the entrepreneurs. A number of actions should be taken to develop training for entrepreneurs, including the following :

- The production of a simple, practical, easy to update, good practice manual for tourism entrepreneurs, providing advice on all aspects of running a successful, innovative tourism enterprise, together with sources of further information
- The organisation of short courses and workshops, with certificates for those who attend, on aspects of managing a tourist enterprise. These could include e-commerce, producing a brochure, quality and customer satisfaction, market research, and so on. These courses could be developed and then taken around the towns and villages of the region as a 'roadshow'

- The introduction of a mentoring system for newly established entrepreneurs whereby experts could provide support during their early days
- The creation of an advice service for entrepreneurs in tourism, provided at regional level
- The organisation of annual conferences for tourism entrepreneurs on topical issues in tourism, again with those attending receiving a Certificate
- Providing opportunities for some entrepreneurs to travel to other regions of Greece and nearby countries to see good practice. They would then be required to disseminate their experiences to others in the region

There is also a need to develop the skills of employed managers in tourism enterprises, through a regional management development programme. This could be run via a foreign university with Greek education institutions, through e-learning and paper-based teaching materials.

Employers in the industry need to have access to training facilities, particularly in technical areas such as cuisine and in relation to customer care. There is also a need for programmes to help employers identified for promotion to develop their supervisory and management skills.

All education and training for the tourism industry needs to follow the following clear principles :

- it should be practical rather than mainly theoretical
- it needs to be interactive rather than passive. People learn best by doing things for themselves not simply being given information
- it has to be international in focus
- it must be continuous and based on the idea of lifelong learning and personal development
- it needs to be sensitive to the seasonality of tourism and the workload of entrepreneurs
- it ought to be focused on the needs of different sectors of tourism such as hotels, restaurants, travel agencies, activity organisers, and local product producers

There is also clearly a need for education and training for public officials in the region and prefectures who are involved in tourism mainly and are spending substantial amounts of money on tourism promotion. These people need courses designed to help them develop their expertise. They also need an opportunity to travel to other regions and countries to see examples of good practice in destination marketing.

The development of successful tourism education and training in Epirus also requires some other actions be taken, notably :

- the creation of a regional education and training committee for tourism, with representatives of the public and private sector to oversee a coordinated approach to tourism education and training in the region
- the provision of training for selected bright young people who may wish to develop a career in tourism. This could start at school with programmes

designed to give school students an opportunity to gain work experience in the tourism industry

- the operation of special programmes for women, either individually or in cooperatives, given that in most communities in Europe, rural tourism is a sector where women play a very important role
- areas of skills shortages should be recognised and courses set up to meet these deficiencies. For example, there is clearly a need for the training of more specialist tour leaders and guides in the fields of adventure, nature, and history tourism

At the same time, in future, perhaps, the granting of public and EU funds to tourism projects should be conditional on the submission of a business plan, which details what training managers and employers will receive.

It would be worthwhile for the regional authorities to conduct a Training Needs Analysis of the tourism industry to identify existing skills gaps. They will then be able to devise a strategy to meet these needs.

To make training cost effective, and to encourage entrepreneurs to join clusters, training and education provision could be restricted, in the first instance, to cluster members. Courses could then be developed specifically for a cluster and training and education could be seen as one of the aspects of the activities of a cluster, along with marketing.

Finally, tourism education and training is an area where Greece is relatively weak. Provision tends to be over-theoretical or non-existent. The region will, therefore need to make use of the expertise of foreign education institutions to develop tourism education and training in Epirus.

An early priority should be to work with these foreign institutions to create a body of qualified tourism educators and trainers within the region.

Tourism education and training is a major priority if Epirus is to achieve its potential as a tourist destination.

Business Plan Competition

Traditionally, formal business planning has not played a big role in the tourism industry in Epirus. However, business plans play an important part in giving enterprises a good chance of success.

To encourage the use of business plans, therefore, in tourism in Epirus it is proposed to run a competition for business plans in the region.

There should be three competitions, each with their own prize, as follows :

- A. a competition for existing enterprises with a prize of money
- B. a competition for any entrepreneur or prospective entrepreneur wishing to develop a new business in tourism. The prize here should be a mixture of money and business advice to help them realise their ambitions
- C. a competition for clusters, with a prize of money and further support and advice

The three separate competitions should have a different form, as follows :

- A. This should require the entrepreneur to produce a five year development strategy for the enterprise. The strategy should focus on how customer satisfaction will be increased and what new product development will be required and how it will be funded.
- B. Here the emphasis should be on a feasibility study for the proposed new enterprise, focusing on who the target markets are, how the enterprise will be differentiated from other enterprises in the same sector, and again how the new enterprise will be funded.
- C. The cluster business plan should concentrate on how the cluster will be funded and organised, and on its activities. It should identify what the cluster hopes to achieve that the individual enterprises could not achieve on their own. It should also explain how the cluster proposes to earn income to pay for its activities.

The competition should also be guided by several principles, namely :

- they should be realistic but ambitious
- they should not rely too heavily for their implementation on outside funding from the government or European Commission
- they should be judged in terms of innovation and creativity

The evaluation panel should be made up of experts without any commercial interest in the tourism industry in Epirus.

The competitions should be publicised widely in the media to encourage entrants but also to promote the importance of business planning to the local business community.

Rather than just 3 main winners, other awards could be offered such as 'Best business plan' from, for example :

- a young entrepreneur
- a women's cooperative

Other awards could also be offered based on where entrants are from such as the best plan from an entrant in Arta, Ioannina, Preveza, and Thesprotia, for instance.

These 'secondary' awards would allow most entrants to win something and therefore feel positive about participating in the competition.

If successful, the competition could become an annual event. Ideally it could become part of an annual set of 'Epirus Tourism Awards', covering business planning, quality [best hotels etc] and education and training.

Finally, the business plan competition could be sponsored by the local media, a bank or local government, for example.

The Potential for New Tourism Enterprises

In order for Epirus to become an even more successful tourist destination, there is a need to develop some new enterprises to fill gaps in the local tourism industry.

Support measures should be put in place in the region to encourage the development of these enterprises.

The most urgently required new enterprises in Epirus appear to include :

- specialist tour leaders and guides in the fields of trekking, adventure sports, gastronomy, nature and wildlife-watching, archaeology and history. These are crucial if high quality specialist tour operators and upmarket independent tourists are to be attracted to the region. While a few such guides already exist in the region there are not enough to support new initiatives in the Epirus tourism industry
- specialist advisers and consultants in crucial areas of tourism such as e-commerce, brochure production, and training
- high quality retail outlets marketing, both through shops and online, the products of the region
- specialist inbound tour operators / travel agents offering special interest holiday packages such as gastronomy, archaeology, Byzantine monuments, and nature, for example
- event organisers to develop arts and cultural events and festivals to attract tourists to the region, particularly outside the summer season
- transport operators able to offer bus and private car tours of the region particularly the Zagoria villages, for those tourists without their own car
- translators who can translate brochures into other European languages. These people would be of interest to many sectors in Epirus, not just tourism
- suppliers of local products for the hotel and restaurant industry such as butter and preserves in small single portion packs to prevent the need to import foreign brands like Lurpak and President
- suppliers of local health products based on natural ingredients such as wild plants

These enterprises would strengthen the attraction of Epirus for tourists while ensuring that as much of the tourist's expenditure as possible stays within the region. Indeed they will also increase visitor expenditure by providing more opportunities for tourists to spend money in the region.

However, these enterprises will not grow naturally for some time, unless they are encouraged and nurtured by the regional authorities. They will also require specialist business advice and training.

It is important that local people develop such enterprises or outsiders, Greek or foreigners, will recognise the potential and move in themselves to exploit the opportunities.

Regional Support Mechanisms for Tourism Enterprises

The regional authority and regional development and enterprise agencies could do a lot to create or supportive environment for tourism enterprises. Already in this report we have identified some of these actions, including :

- the creation of a regional tourism organisation that would take a strategic approach to the marketing of Epirus as a tourist destination. This would help entrepreneurs plan their own tactical marketing activities
- the development of a good practice manual for tourism enterprises covering all aspects of the management of a successful tourism enterprise
- the introduction of a series of initiatives on tourism education and training for entrepreneurs, as outlined in the education and training section
- the implementation of actions to facilitate entrepreneurs getting involved in e-commerce
- a business plan competition to encourage a more professional approach to business planning
- introduce 'Regional Tourism Innovation Awards' to encourage entrepreneurs to find innovative ways of developing their business. Different categories of awards could be offered for different sections [hotels, travel agencies, women's cooperatives, and so on]
- the creation of a tourism enterprise advice service in the region which would offer confidential advice to any entrepreneur. This service would need to be staffed by people with recent business experience in tourism, preferably also by people with tourism management qualifications
- the establishment of a tourism entrepreneurs networking club where entrepreneurs can get together, informally, to share experiences and learn from each other
- the development of a programme, whereby an entrepreneur can have their enterprise evaluated by an external specialist in tourism, on a confidential basis, to identify areas for improvement
- the introduction of a programme of bringing foreign specialist tour operators to talk to entrepreneurs and tell them about how they work and what foreign tourists want

Given the lack of experience in entrepreneurship in tourism in the region, in general, there is a need for 'demonstration projects' whereby a number of dynamic enterprises are given the opportunity to receive a package of assistance measures [advice, limited funding etc] in return for which they agree to take some innovative actions. Their experience then provides a 'demonstration effect' for other entrepreneurs in the region, who can then learn from their experiences and modify their own business accordingly. Of course, lessons can be learned from both successful and unsuccessful 'demonstration projects'. As far as possible, 'demonstration projects' should be drawn from all 4 prefectures and from the different sectors of tourism. Furthermore, in order to be effective there has to be effective dissemination of the results of the 'demonstration projects'.

It seems likely that over the coming decade, there will be a reduction in European Union funding for tourism and entrepreneurship programmes. This will mean a greater need to prioritise spending. The author believes the top three priorities in terms of funding for tourism entrepreneurship should be :

- support for the 'demonstration projects' highlighted above
- the development of 'clusters' which aim for financial self-sufficiency
- programmes designed to encourage women and young people to set up new tourism enterprises to inject new dynamism into the regional tourism industry and to encourage these groups to stay in the region rather than leaving

Finally, tourism only develops successfully where there is a critical mass of attractions and enterprises. To facilitate this process the region should ideally prioritise 'Tourism Development Poles' where the majority of effort and funding will then be directed. These 'poles' could be either existing destinations with potential for future growth, or, preferably, undeveloped 'new destinations' with great potential for growth.

Guidelines for Successful Tourism Enterprises

Clearly, there are no golden rules that guarantee the success of a tourism enterprise.

However, there are a number of principles that maximise the potential for success of any tourism enterprise. There are also steps which any successful tourism enterprise needs to take.

The author believes that a manual of good practice for entrepreneurs should be developed, as outlined in the proposals in the education and training section of this report, to act as a guide for all tourism entrepreneurs.

In this section, the author sets out, briefly, and in outline only, the key points that should be covered in greater detail in such a manual.

The manual should also contain detailed case studies of good practice from elsewhere in Greece and the rest of the world to encourage local entrepreneurs to emulate this good practice. It would also include a section on sources of further information and advice.

Furthermore, the manual could also be available online, with updating to take account of changes.

The manual could be divided up into the following chapters, and it is these 'chapter headings' that will be used for the suggestions which follow :

1. Concept, strategy and vision
2. Launching the enterprise
3. Funding and financial management
4. Human resources management
5. Understanding the customer
6. Working with foreign and Greek tour operators
7. Product development
8. Pricing
9. Promotion
10. Distribution

11. Quality and customer satisfaction
12. Key issues for different sectors of tourism – hotels, activity organisers, travel agents

Strategy and Vision

An enterprise, whether well established or new, needs to have a strategy to give it a sense of purpose and direction.

Furthermore, entrepreneurs have to ask – and find answers to – the following questions –

- what are their objectives for their enterprise?
- where do they want their enterprise to be in five or ten years time?
- what is unique or different about their enterprise?

At the same time, an entrepreneur needs to be clear about whether they want to aim for profit maximisation or if they want to achieve a situation where they can earn just enough to give their family a satisfactory quality of life.

Launching a New Enterprise

Before any new enterprise is launched, a feasibility study should be conducted to see if the business will be viable. This feasibility study should focus on the potential market for the enterprise and its product. This may involve undertaking test marketing with potential customers to see if they would buy the enterprise product for service if it were available.

Then, it is important to produce a business plan including cashflow forecasts, together with details of funding, staffing, and marketing.

Once the decision is taken to start a new enterprise, the marketing effort needs to be undertaken to ensure that when the enterprise starts to offer its products or service, the market already knows about it, and is ready to buy it.

Funding and Financial Management

Clearly, any new enterprise will require funding to get started. Wherever possible, this money should come from the entrepreneurs existing resources or from financial institutions such as a bank.

Of course, many entrepreneurs in Greece have made heavy use of European Union money when opening new tourism enterprises such as hotels. However, this source of funding is likely to decline in future years with the continuing enlargement of the European Union.

Once the enterprise is open, financial management becomes the key issue, including :

- management of the cashflow, which is particularly important in a highly seasonal business like tourism
- credit control, so that the enterprise chases money it is owed by its customers as quickly as possible
- consistently looking around for new suppliers offering a similar product at a lower cost

- the use of leased or rented equipment, instead of purchasing outright, to reduce expenditure
- the purchase of supplies, wherever possible, on a 'sale or return' basis eg. souvenirs sold in hotels, so that if they are not sold, the hotel will not pay for them
- obtaining the longest possible credit periods from suppliers so that they can pay their bills as late as possible

Human Resources Management

The success of any enterprise in a service industry such as tourism depends on the quality of staff and the service they offer. The key issues in human resources management in tourism include the following :

- professional approaches to recruitment including preparing proper job descriptions and person specifications identifying what skills and experience is required of the postholder, together with formal interviews and the taking up of references on all candidates
- ensuring that the best person is appointed and not just a member of the entrepreneurs family or the family of a friend or acquaintance. Jobs must go to the best person
- giving each member of staff who joins the enterprise an induction to help them see how they fit into the enterprise and what is expected of them
- providing incentives for staff to perform well including cash bonuses and 'employee of the month' awards for example
- measures to maintain motivation and job satisfaction such as letting people get experience of different jobs and asking their opinions on issues affecting the satisfaction of customers
- offering training to staff to help them perform their tasks more effectively; this can also help make staff feel their work contribution is valued by the entrepreneur
- multi-skilling so that staff can do more than one task within the enterprise which helps if other staff go off sick or on holiday
- the identification and encouragement of good workers who may take on supervisory / management roles in the future

Poor human resources management causes high staff turnover which is costly to enterprises in terms of having to keep recruiting and training new staff, and in terms of poor customer service.

Finally, it is important to recognise that while training is very important it cannot turn the 'wrong' employee into a great worker, in other words, it cannot compensate for poor recruitment practice.

Understanding the Customer

Any tourism enterprise only succeeds by meeting the needs of its customers which means any entrepreneur needs to understand customers. However, they do not need just to understand their existing customers. They must also understand potential customers so that they can encourage them to buy their products and services.

Tourism enterprises in Epirus know the domestic Greek market well, but they are much less knowledgeable about foreign tourists, who are important potential clients for the tourism industry in Epirus.

Understanding the tourism market involves entrepreneurs undertaking the following actions :

- informal discussions with existing customers when they are in the hotel or restaurant, for example, to find out about their desires
- using intermediaries such as foreign tour operators and travel agents to find out about changes in tourist behaviour
- looking at reports about the tourism market such as those published by Mintel in the UK
- reading the professional journals of the foreign tourism industry such as Travel Trade Gazette, in the UK and Ireland, for example
- making use of the data collected in Greece by EOT and by its offices abroad, particularly London

Working with Tour Operators

Many tourism enterprises in Epirus rely on tour operators, both Greek and foreign, for a lot of their business. They therefore need to understand how these tour operators work, particularly the foreign ones, if they are to develop effective relationships with them. They need to understand the following points if they are to develop successful tour operator relationships :

- mass market operators are almost wholly concerned with price while for specialist tour operators, it is the product quality and uniqueness which is most important, although price still matters
- for many specialist tour operators, the season is all year round. Indeed for destinations in Greece, summer may not be their peak season as many special interest tourists – walkers, nature watching etc. – may avoid the summer because it is perceived to be too hot or busy
- many foreign operators work increasingly via e-mail and the Internet and prefer to deal with suppliers who are able to communicate by e-mail and have good websites
- it is essential to develop a trusting relationship and to convince the tour operators that enterprises will honour contracts and not overbook or try to change prices once they are agreed

- when considering offering holiday packages to a new destination, such as Epirus, operators would welcome help from local enterprises with itinerary planning ideas. However, sample packages and itineraries offered by enterprises must be practical and realistic in terms of timings and costs, for example

Product Development

No enterprise can afford to stand still in terms of its product and service. Today's tourist is always looking for new products and experiences while their expectations are constantly increasing. Therefore, product development is an important activity for all tourism enterprises. It can encompass physical product development eg. the building of a swimming pool at a hotel, or development in service levels.

Obviously, product development has to be financially viable, bringing more financial gains than it costs, so some form of cost-benefit analysis is necessary when considering any new product development.

Because it can often take time for a product innovation to pay back it is important to take a long-term view, so that the entrepreneur has a view of how the product will be developed over a period of time.

No product development should take place without some research including :

- seeing if it would be well received by existing customers
- investigating if it would attract new customers for the enterprise
- looking at what product development competitors are undertaking

Pricing

Pricing must be based on logical principles, notably the costs of production. However, an entrepreneur has to also consider other issues, notably :

- discounts for regular customers, group bookings, and off-peak season customers. However, the discount should help attract new business rather than simply allowing people who would have bought the product anyway to buy it at a lower price
- the prices charged by competitors, although it is better to differentiate the product from that of ones competitors so that competition will not just be based on price
- value for money is often more important for customers than price; in other words, people will pay more if they feel they will receive a better parcel of benefits in return for the price they pay

Customers also like to see prices which are transparent with no 'hidden extras' such as taxes, service charges, parking charges etc.

Promotion

Tourists will not buy a product unless they know it exists and feel positive about it; promotion is how we inform and entice potential customers.

For a destination like Epirus, and its entrepreneurs, there are four major ways of promoting their services, as follows :

- (i) *The Internet*. A website is a cost-effective way of promoting an enterprise, providing that it is well designed and regularly updated. It allows you to present information and product images to the customer and these can be changed frequently. However, in order for the website to be viewed sufficiently by potential clients, it needs to have the right links to other sites, and has to be accessible through the most popular search engines
- (ii) *Direct Marketing* where databases of tour operators and independent tourist are used for direct mailshots by entrepreneurs. Such mailshots should focus on new product development and special offers. However, the mailshots have to be well written and professionally produced
- (iii) *Brochures*, which should be glossy, colourful, and professionally produced. Wherever possible, they should also include prices
- (iv) *Trade Fairs*, but entrepreneurs should only attend these if they have products to sell directly to trade fair visitors and they can do deals on the spot

When targeting foreign markets, it is important that promotional material is available in foreign languages. It is better to have such material written by foreigners in their first language than translated from Greek.

Distribution

For many small and medium sized entrepreneurs in the Epirus tourism industry, distribution is the real challenge, in other words, how tourists, particularly in foreign countries, can actually buy their products and services.

Again, the Internet is one answer if the enterprise website can accept online bookings, either directly, or via online travel agencies such as Expedia or Dilos World, for instance.

Otherwise, the entrepreneur can :

- sell via externally based tour operators, and / or
- sell directly to tourists

The latter is very time-consuming and risky, although it does mean the entrepreneur will get a higher price for their product.

Whatever distribution system is selected, it must be efficient or else business will be lost.

Quality and Customer Satisfaction

Successful businesses are those which offer quality and satisfy their customers. It is vital, therefore, that entrepreneurs continually research the satisfaction levels of their customers, through :

- customer satisfaction questionnaires, given to every customer, and with incentives – such as entry in a free prize draw – for them to complete and return the questionnaire
- observation, in other words watching how customers behave and getting staff to report back on customer comments they overhear
- regular analysis of customer complaints and comments

It is also very important that if customers do complete questionnaires or make complaints, that something is done and the customers are told what has been done.

Finally, it is essential that we offer customers a level of quality which reflects the price they pay. We cannot afford to offer luxury quality to people paying an economy price, but, at the same time, we cannot offer a modest level of quality to someone paying a high price.

Key Issues for Different Sectors of Tourism

So far we have concentrated on general advice for entrepreneurs; there are however, some issues which are specific to particular sectors of tourism, notably :

- *Hotels.* It is important, given the large number of small hotels in Epirus, to offer something which is different from one's competitors. This could be : an indoor swimming pool or Jacuzzi; a panoramic view restaurant; mountain bikes for hire; or, a patio for al fresco breakfast service, for example
- *Restaurants.* As far as foreign tourists are concerned, most will look for restaurants which offer traditional simple local cuisine rather than those which offer 'international' dishes. They will also want to know that the dishes are being made using locally produced ingredients. Finally, offering some truly vegetarian dishes which are more imaginative than salads or omelettes will also help attract Northern European clients
- *Activity Organisers.* Because of the publicity given to accidents worldwide in the past, the main selling point for activity organisers is convincing clients that safety is their first priority. However, it is also important for them to offer products which are innovative and unique as adventure tourists and special interest tourists are always searching for new experiences
- *Local product producers.* Here the need is for unique products, high quality packaging, a stylish brand image and logo, and a good distribution network. Tourists will also buy more if they can visit the production site, see the production process for themselves, and buy directly from the production site

Implementation, Priorities, Timescales, and Monitoring

In this report, the author has offered a marketing strategy for Epirus, as well as a whole range of related recommendations for developing Epirus as a tourism destination, and encouraging the growth of entrepreneurship in tourism, in the region.

However, it is important that particular attention is paid to the implementation of these ideas. This means that :

- (i) An implementation plan needs to be drawn up which states who should be responsible for implementing each of the actions recommended in this report
- (ii) An organisation should be given the task of overseeing the implementation process; this role should be taken by the regional tourism organisation proposed earlier in the report
- (iii) Certain priority actions should be identified that will help create an environment in which all the proposals in the report can be implemented. These also could include the :
 - creation of the regional tourism organisation and its development of a detailed five year strategy for the marketing of Epirus as a tourist destination
 - production of a detailed manual of good practice for entrepreneurs to help them run their business as well as possible
 - development of an integrated training and education plan for entrepreneurs, employees, and public officials involved in the tourism industry in Epirus
 - creation of tourism 'clusters' in the region
- (iv) The regional authorities need to draw up a plan to ensure that over time the development of tourism in Epirus becomes less dependant on public funding, particularly from the European Union, or it will never become sustainable
- (v) A realistic timetable needs to be established for implementing the actions contained in this report
- (vi) Wherever possible, measurable targets should be set against which performance of the region can be evaluated. These targets could cover issues such as :
 - the number of tourists attracted and their expenditure
 - the number of new tourism enterprises established
 - the number of staff and entrepreneurs undertaking training
 - the number of enterprises owned by women or young people
 - the number of new clusters established
- (vii) A monitoring system is established, at regional level, to monitor the implementation of the various actions recommended in this report

Conclusions

Epirus has the natural resources and cultural attractions to make it one of the leading ecotourism destinations in Europe. The local tourism product has some real strengths and significant improvements are being made in the infrastructure of the region.

However, there are still several major obstacles which are stopping Epirus realising its true potential as a tourist destination. Firstly, there is the lack of a regional tourism organisation, with representatives of local tourism interests, to coordinate the development of tourism in Epirus. Secondly, there is the under-developed

entrepreneurial culture, with many enterprises under-performing, a lack of experience of attracting foreign tourists, and a lack of enterprises in some areas of tourism.

This report has offered a large number of recommendations and suggestions to help Epirus achieve its full potential as an ecotourism destination.

However, this is just a first step and the implementation will require coordinated action over a long period of time. Much work needs to be done, and it can only be done by the public and private sectors in Epirus.

If the recommendations in this report are fully implemented, there is no reason at all why Epirus should not become a leading ecotourism destination in Europe.