

Tourism Destination Development, a Situation Analysis of a Greek Region



Eirini Triarchi, Paraskevi Pappa, and Efstratios Kypriotelis

Abstract Tourism is acknowledged to contribute to job and wealth creation, economic growth, environmental protection, and poverty reduction. Therefore, the excellent performance of the tourism sector globally implies the prospects of a significant revenue stream. Tourism beneficial influence is evident in improving the quality of social life, in intercultural understanding and the sustainable development of cities and communities. Tourism success in building sustainable destinations is a contemporary challenge that the globalization, technology, innovation, climate, and demographic change produced. Well-Balanced tourism management must incorporate all the new trends and supports policies towards sustainability and competitiveness of destinations. However, tourism growth has also unfolded its negative side, especially on the environment, society, and the local economy, shaking the balance between tourists, locals and destinations, and the organizations and businesses of the sector. Thereby, the role of policy planners and developers in tourism should be to maximize destinations communities' welfare by eliminating any other costs. They should be in the position to identify and promote those types of tourism—mass versus alternative—that locals are in favour, ensuring the success of sustainable tourism development. To this context, a challenging issue is how a remote, poor and low performing tourism region, can be developed as a tourism destination and ensure sustainable growth? What type of tourism should be evolved in the area increasing tourists' arrivals, extending their stay and at the same time respecting local society's welfare? These questions are answered through the case study of Epirus development as a tourism destination. Epirus, a region located in Northwestern Greece has the potential to be developed as a favourite tourism destination and establish a distinct tourism destination image. The region holds a wide range of heritage monuments, natural

E. Triarchi (✉) · P. Pappa · E. Kypriotelis
Department of Accounting and Finance, University of Ioannina, Ioannina, Greece
e-mail: etiarhi@uoi.gr

P. Pappa
e-mail: pvpappa@teiep.gr

E. Kypriotelis
e-mail: kypriot@teiep.gr

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and cultural resources. However, inadequate infrastructure, inefficient governmental policies, ineffective promotion, lack of collaboration of the region's stakeholders, especially when existing in combination, hinder the sustainable tourism development. The central part of the case study is the S.W.O.T. analysis of Epirus as a tourism destination. This situation analysis discovers the significant advantages and the weak spots of the region as well as the potential opportunities and threats. Further, the stakeholders involved in the destination development are recorded, and the development vision is presented. This analysis will be useful in assessing the region's competitiveness as a tourism destination and in planning effective policies for the further development and delivery of tourism experiences following the current market trends of the tourism industry.

Keywords Tourism destination development · Alternative tourism · Mass tourism · SWOT analysis · Sustainable development · Stakeholders

JEL Classification Z3 tourism economics

1 Introduction

The tourism sector has become one of the rapidly growing services sectors of the world, recording a growth above average at around 4% per year, since 2008, involving an amount of 300 million more of international travelers for the period 2008–2016 (UNWTO 2017a, p. 11). This excellent performance implies prospects of a significant revenue stream, and indeed tourism is acknowledged to contribute significantly to job and wealth creation, economic growth, environmental protection and poverty reduction (UNWTO 2017b, p. 12). Further, beneficial tourism influence is found in war conflict situations generating peace, in gender equality and others discrimination issues, in improving quality of social life, in intercultural understanding and the sustainable development of cities and communities. Tourism success in building sustainable destinations is a contemporary challenge that the globalization, technology, innovation, climate, and demographic change produced. Well-Balanced tourism management must incorporate all these changes that reshape the world, respond effectively to, by increasing the sustainability and competitiveness of destinations (UNWTO 2017a, p. 35). However, tourism development is not costless. During the years, it has unfolded its negative side especially on the environment, society, and the local economy; it is shaking the balance between tourists, locals and destinations, and the organizations of the sector. Destinations communities estimate to what extent the benefits of tourism outweigh the social and environmental costs so that when prospects are favourable to enforce a destination's tourism development (Sharpley 2014, p. 37). Thereby, the role of policy planners and developers in tourism should be to maximize destinations communities' welfare by eliminating any other costs. Hence, they are called to identify and to promote those types of

tourism—mass versus alternative—that locals are in favour, ensuring the success of sustainable tourism development.

To this context, a challenging issue is how a remote, poor and low performing tourism region can be developed as a tourism destination and ensure sustainable growth? What type of tourism should be evolved in the area increasing tourist arrivals, extending their stay and at the same time respecting local society's welfare? Hence, a case study of Epirus, a region in Northwestern Greece is constructed for answering this question. Epirus has the potential to be a favourite tourism destination and establish a distinct tourism destination image. The region holds a wide range of heritage monuments, natural and cultural resources. However, inadequate infrastructure, inefficient governmental policies, ineffective promotion, lack of collaboration of the region's stakeholders, especially when existing in combination, hinder the sustainable tourism development in the region. The main point of the case study is the S.W.O.T. analysis of Epirus development as a tourism destination. This situation analysis discovers the significant advantages and the weak spots of the region as well as the potential opportunities and threats. The stakeholders involved in destination development are also recorded, and the development vision is presented. This analysis will be useful in assessing the region's competitiveness as a tourism destination and in establishing effective policies for the further development and delivery of tourism experiences following the market trends of the tourism industry. A brief analysis of the dispute mass tourism versus alternative is presented in the next section, followed by the case study while the last section concludes.

2 Mass Tourism Versus Alternative Tourism

Although mass tourism supports economic growth through its “big” numbers in revenue, visitors, jobs creation, entrepreneurs, investors, it generates negative effects on the destination economy. These are the overvaluation and speculation on land values, the outflows of money and the rise of social, cultural and ecological dilemmas. All these turn the interest to a different approach in tourism, an alternative to large numbers of visitors, to clumsy and unregulated development, to environmental destruction, social alienation, and homogenization. Furthermore, a more sensitive approach giving priority to natural and cultural resources at the front line of planning and development, it is required. Thereby, alternative tourism has been emerging in the last decades to cope with the “inconveniences” caused by “mass tourism” and to increase the satisfaction of locals. Alternative tourism involves small-scale projects, requiring low-level of investments, being low-key, independent and self-sustaining, and embolden the high participation of the local inhabitants. When locals as hosts of visitors involved in the process the outcome are also satisfactory for the foreign guests that enjoy a more authentic, meaningful and interacting experience. After all, alternative tourism aims at establishing direct personal and cultural intercommunication and understanding between host and visitor (Dernoi 1988).

The use of the term “alternative tourism” turns to be problematic, as the forms of alternative tourism are closely related to the principle of sustainable development, making the term “sustainable tourism” more accurate in describing the “new” forms of tourism. In nowadays, according to UNWTO “sustainable tourism development guidelines and management practices apply to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability” (UNWTO 2005a). Weaver (2012, 2014), criticizing both mass and alternative tourism, argues that all types of tourism entail a cost. In this context, the focus must be on the ability of sustainability—strategic management nexus to eliminate costs (direct and indirect) of a given activity while at the same time maximize the associated benefits, both locally and globally (Weaver 2012, p. 1030).

3 A Case Study of Epirus Tourism Destination Development

Epirus until recently was a rather remote and impoverished region in Greece mainly receiving domestic tourists. Region most known areas have been the coastal ones for attracting foreign visitors during the summer, following the traditional tourism model of “Sea-Sun-Sand tourism.” However, due to the underdevelopment of transport infrastructure and to inadequate accommodation facilities could not become the recipient of a large volume of tourists. The last decade the completion of major infrastructure works generated prospects of Region’s openness to new resources markets. Epirus now can and should follow a successful path and take a competitive position in the tourism market. For this, the creation of a destination image delineated and appealing to visitors is prerequisite. This is the concept in which our analysis is based.

3.1 Region’s Profile

Epirus is located in the north-western part of Greece, and it is the most mountainous region. In its western part, the Ionian Islands are found (Map 1). Epirus is divided into four Regional Units. These are (a) the Regional Unit of Arta, with four municipalities, (b) the Regional Unit of Preveza, with three municipalities, (c) the Regional Unit of Thesprotia, with three municipalities and (d) the Regional Unit of Ioannina, with eight municipalities. The capital of the Region is the city of Ioannina, located in the fourth regional unit.

Map 1 Epirus Region.

Source <http://www.maps-of-greece.com/epirus-map.htm>



Epirus is the crossroad of Balkans and Western European countries. The key feature of the region is its geomorphological variety including:

- the coastal zone of the regional units of Preveza and Thesprotia,
- the zone of mountain ranges which extends along the eastern boundary of Ioannina's regional unit,
- the agricultural land area in the southwestern part of Epirus.

Epirus is sparsely populated as its density is 36.6 inches/km², accounting for only 3.1% of the country's population. This region, for the longest part of its history and until recently has been the least developed and the most remote region not only of Greece but of Europe as well. It has suffered from emigration, and there are still significant disparities between rural and urban areas. The main demographic problem that area is facing up is the ageing of the population.

In terms of Gross Domestic Product (GDP), Epirus is classified as the poorest Greek region. According to ELSTAT, Regional Accounts, (Time series 2012) in 2012, the region of Epirus accounted for 2.18% of the national Gross Domestic Product (GDP). In terms of GDP per capita was positioned last among the Greek regions with a regional GDP per capita of €12.207, and it is classified in the less developed region of Europe (GDP per inhabitant in PPS < 75). In 2015, the average GDP per capita decreased further to €11.500 (ELSTAT 2018). According to Kolasa-Sikiaridi (2017) "Three of Greece's 13 regions—Eastern Macedonia-Thrace, Epirus and Western Greece—were among the 20 poorest regions in the European Union in terms of per capita GDP in 2015, according to figures released by Eurostat. For 11 of the 13, their per capita GDP was less than 75 pct of the EU average".

3.2 Tourism in Epirus

As Epirus includes coastal areas the main reason to travel in the region is the same of this existing in the rest Greek coastal areas and islands and is based on the model of “Sea-Sun-Sand tourism” (Table 1). The clean coasts of the region (11 blue flags in 2017) enhance this reason for visitation. In accordance with this, water-sport activities are established with success. The most popular period to visit these areas is from the end of spring until early autumn. However, there is a slight increase in tourists that are nature and culture lovers, and visit the mainland mostly during winter and autumn. This type of tourists are far away from the “traditional” ones, and if communities are willing to discover their needs and satisfy them on their arrival, then there will be in the position to acquire alternative sources of revenue. Until now, the average length of visitors stay is 5.1 days in Epirus, lower than 6.8 days country’s average (SETE 2018, p. 33).

Table 1 Reason of travel to Epirus

Activity (%)	spring	summer	autumn	winter	annual average
mountainous tourism	7%	8%	11%	12%	10%
mountainous sport	6%	5%	8%	13%	8%
tourism on the coast - traditional	30%	35%	14%	6%	21%
water sport (sea)	18%	30%	24%	16%	22%
water sport (lakes and rivers)	12%	4%	9%	8%	8%
observation of nature	6%	4%	8%	6%	6%
visiting famous places	7%	4%	11%	20%	11%
taking place in events	9%	6%	11%	11%	9%
combination of few various types of activities	5%	4%	4%	8%	5%

Source Regional Job Markets 2012, pp. 79–84 cited in Social Network for Tourism Operators (2012)

The amount of visitors that approach the Epirus Region for the year 2013 according to the Research on Regional Tourist Expenditure is 519.242, accounting for 2.9% of the total arrivals in the country. Comparing this number to the corresponding figure in 2006 which was 369.555 visitors in the region there is a significant increase of 71.2% (ELSTAT 2013). The effort of Epirus state to promote and establish a more competitive tourism destination profile combined with the provision of better infrastructure (such as transport infrastructure) supports the development of the tourism sector. Nevertheless, there are still many things to be done since in 2017, the number of arrivals in the region reached the amount of 713.000 visitors, reflecting a 2.3% in the total arrivals in Greece and ranking Epirus at the eighth position out of the 13 Greek regions (SETE 2018, p. 19).

Although, the presentation of tourism contribution to GDP by region (Table 2), is based more on approximation, is rather indicative of the reality.

Epirus tourism contribution to regional GDP is only 4%, that is higher than the corresponding of Western Greece, Sterea Ellada, Western Macedonia, and Attiki, much lower than Crete, South Aegean, Ionian Islands, and South Aegean. The revenues from tourism in 2017 were 216 million euros accounting for 1.5% of the total revenues in Greece, ranking Epirus at the 9th position out of the 13 Greek regions (SETE 2018, p. 27).

3.3 Situation Analysis

In situation analysis, the S.W.O.T. analysis is included as a key instrument in assessing tourism destination competitiveness. It is based on specific knowledge of the present situation and trends, including the factors of the internal situation such as existing strengths and weaknesses in elements of destination, in marketing and in region's tourism sector and factors of the external environment such as future opportunities and threats in competition, market, environmental issues and governmental policies.

3.3.1 Analysis

The following S.W.O.T. Analysis, referring to Epirus region is based on previous official S.W.O.T. analysis, studies made by researchers under E.U. programmes (Swarbrooke 2004; Toureg, Innovation & Tourism Knowledge 2009; South East Europe Transnational Cooperation Programme 2013; Epirus Regional Government 2015) and on other secondary data. This analysis aims to identify the weakness of the existing tourist model and to build a new one, more competitive—following the current market trends—for establishing the region of Epirus as a tourism destination.

Table 2 Measurement of tourism contribution to the basic economic figures

Region	% Allocation of the overnight stay in hotels 2013	Ratio of direct tourism expenditure 2013 in mn €	GDP by region 2012-in mn €	The contribution of tourism to GDP by region, data 2012	GDP per capita, 2012, in mn €
Crete	28.7%	4.372	9.067	48%	14.398
South Aegean	24.7%	3.767	6.240	60%	18.064
Ionian Islands	11.0%	1.680	3.402	49%	16.100
Central Macedonia	10.7%	1.626	26.109	6%	13.645
Attiki	9.2%	1.403	94.964	1%	24.099
Peloponnese	3.2%	481	8.241	6%	13.870
Thessaly	2.6%	394	9.505	4%	12.757
Eastern Macedonia & Thrace	2.4%	369	7.653	5%	12.270
North Aegean	2.1%	325	2.784	12%	13.394
Western Greece	2.1%	317	9.150	3%	13.431
Stereia Ellada	1.7%	257	8.543	3%	15.075
Epirus	1.2%	185	4.242	4%	12.207
Western Macedonia	0.5%	69	4.304	2%	15.050
Total	100.0%	15.242	194.204	8%	17.507

Source SETE Intelligence (2015)

<p>Attractions and Events: Natural-Cultural Resources, Museums & Art Galleries, Activities, Events</p>	<p>Strengths</p> <ul style="list-style-type: none"> • The existence of important ecological wealth and exceptional natural ecosystems • Superb wetland environments in the coastal areas, with rare birds and plants • Clean coasts and awards of “blue flags” • Numerous traditional settlements • The variety and uniqueness of archaeological sites and monuments, locating in the four regional units • The existence of modern and various forms of museums and galleries in Epirus • Establishments of natural and cultural routes in the Region, funded by European programmes • The long tradition in the art of silversmith in the Region’s capital of Epirus • Great potential for activities both water-based (rafting, angling, kayaking, swimming, sailing, water-skiing), and mountain-based (mushroom hunting, hiking, running, cycling, climbing, parapente flying skiing, skiing) • The long tradition in athletic events such as rowing races carrying out in Pamvotis Lake • New establishments of athletic events for the participation of everyone regardless of age, origin, and others • The existence of traditional festivals and events in villages and towns, being open to everyone
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(continued)

(continued)	<p data-bbox="185 795 209 883">Strengths</p> <ul data-bbox="224 144 636 883" style="list-style-type: none"> <li data-bbox="224 144 298 883">• The transformation of Epirus as a central hub of trans-European networks in the Western and Eastern Mediterranean due to the integration of projects in transport infrastructure. Adriatiki–Ionio–Albania <li data-bbox="303 144 377 883">• The completion of construction of “Egnatia Odos” highway, the “Aktion” undersea tunnel and “Ionia Odos” highway, have significantly improved Epirus’ accessibility <li data-bbox="382 144 432 883">• The road signposts due to the completion of construction of major projects have been improved significantly <li data-bbox="437 144 488 883">• Igoumenitsa’s port is an important transport hub in Western Greece, welcoming an essential number of tourists annually <li data-bbox="492 144 589 883">• Two airports serve the region, Ioannina and Aktion (Preveza). Aktion airport is turning to be an international one, attracting recently low-cost air carries and increasing its connections to other European cities. (E.g. the British low-cost airline carrier “Easy Jet” started flights connecting London to Preveza) <li data-bbox="593 144 636 883">• The Undersea Tunnel of Preveza-Aktion has increased the accessibility of Preveza airport to Epirus
Accommodation supply, food & beverage, conference centres	<ul data-bbox="656 144 777 883" style="list-style-type: none"> <li data-bbox="656 296 679 883">• A significant increase in tourist accommodation establishments <li data-bbox="684 144 735 883">• Many accommodation establishments are relatively new in construction, some of them offering wellness amenities <li data-bbox="739 144 777 883">• High-quality establishments found in the capital of Epirus (5 stars and 4 stars hotels) <p data-bbox="782 144 859 883">There are distinctive vineyards in the region, like those of Zitisa’s village where visitors can enjoy the high quality of Epirus wines and the hospitality of local Wineries</p> <ul data-bbox="864 296 938 883" style="list-style-type: none"> <li data-bbox="864 319 887 883">• There are many stores for tourists to buy local food products <li data-bbox="892 296 938 883">• Restaurants provision of good food quality at a reasonable price <p data-bbox="918 666 938 883">New conference centers</p>

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Marketing	<p>Strengths</p> <ul style="list-style-type: none"> • The rise of private and public stakeholders' awareness of the importance of marketing in Epirus' promotion as a tourism destination • Specific areas of the mainland start to build an international image as Zagoria and Metsovo. The coastal area of Parga is the most Known in the foreign visitors followed by Syvota and Preveza • Epirus Regional authority participates in tourism exhibitions inside and outside the country for strengthening the region's position "in traditional markets" where Epirus and its products are particularly famous • E.U. programmes and the Greek National Tourism Organisation "EOT" provide funds for the promotion of Epirus as a tourism destination • In the city of Ioannina recently established a tourist public information office • The University of Ioannina has developed an e-booking system for Epirus hotels
Local tourism sector	<ul style="list-style-type: none"> • Increase in hospitality operations • Prediction for the growth of the Epirus tourism sector • Local entrepreneurs are in business cooperation with foreign tour operators to attract more foreign visitors • Many successful adventure tourism organizers are based in the region • Provision of motives for the establishment of alternative forms of tourism • Presence of Academic Institutions supporting through their graduates and their researches the regional development of tourism • Integration of E.U. Programmes aiming at the development of a sustainable tourism model in the region

<p>Attractions & Events: Natural-cultural resources, museums & art galleries, activities, events</p>	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of Epirus attractions awareness abroad • Lack of efficient management of attractions • No well-signed heritage and natural sites, lack of on-site interpretation, graphic panels, and information signs • Delays in the integration of many European programmes, enhancing the natural and cultural heritage of the region • The absence of contemporary interpretation techniques in the museums • Insufficient working hours are preventing the planning of itineraries visits to them • Limited awareness of traditional crafts as a tourist attraction • Non-established athletic events regularly as well as major athletic events • Lack of awareness of traditional festivals • Disability of organizing events in which tourists can interact
<p>Transport infrastructure</p>	<ul style="list-style-type: none"> • The provincial roads are bad, and the inadequate signposting is making difficult the accessibility to mountain areas. The result is long lasting, dangerous and tiring journeys • The performance of Igoumenitsa's port lags behind the others port of Greece (7th rank, accounting for 7%, of the total maritime transport in Greece). Severe delays in its infrastructure work • The airfare Ioannina to Athens is particularly expensive • The flights from Ioannina airport suffer from low capacity and unreliability due to the region's weather conditions • There is a lack of marinas with adequate capacity in comparison to other parts of Greece
<p>Accommodation supply, food & beverage, conference centres</p>	<ul style="list-style-type: none"> • Short stay of visitor's as (average length of stay is 4.4 days) • Only 20.4% of hotel capacity reflects the highest hotel categories (5 and 4 stars hotels), as the majority are the lowest categories (3, 2 and 1-star hotels) • Lack of adequate campsites and youth hostels • Severe dependence of coastal accommodation on tour operators for doing business • Inadequate education and training in hospitality services

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Marketing	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • An absence of a coherent marketing strategic plan coordinated by public and private DMOs to market the region as a whole and build its brand name • The public sector's involvement in destination marketing is fragmented and not effective • The contribution of the participation of regional authorities to tourism exhibitions is never estimated • Limited tourist information offices in the region comparing to other European Countries • Rarely use of inbound marketing of accommodation establishments in promoting their business to tour operators and tourists • Insufficient packaging of the tourism product
Local tourism sector	<ul style="list-style-type: none"> • Only 8.3% of the Epirus workforce is employed in the tourism sector • Lack of flexible training and education opportunities, for both tourism officials and entrepreneurs • Many entrepreneurs are inexperienced in establishing cooperation with foreign tour operators • Lack of collaboration in culture between stakeholders, leadership, strategy destination • Lack of destination management • There are no developing tourism clusters in the region as a whole

	Opportunities
Competition	<ul style="list-style-type: none"> • European and national programmes enhance region rural tourism development and the delivery of quality vacation experience • Competitive cost of vacation compared to other Greek Regions
Market trends	<ul style="list-style-type: none"> • The region has the potential to follow a range of market trends existing in Europe, including: <ul style="list-style-type: none"> – the fast growth of demand for trips to various cultural attractions and amenities (cultural tourism) – the desire to visit not traditional tourism destinations rejecting the “mass model of tourism holidays” – the increasing demand for activities and adventure holidays such as rafting, kayaking, bungee-jumping, cycling, horse-riding, and hiking – The desire of visitors to engage in more interactive and intangible experiences, to develop their creative potential (creative tourism) through active participation in courses and learning experiences, associated to local culture (languages, gastronomy, and art) – The growing interest of tourists in industrial or workplace tourism, i.e. Visiting places of work or craft enterprises • The creative innovations in tourism are repositioning the travel system, shifting from a traditional value chain towards a “value web” that includes travel suppliers, consumers, residents, other non-travel actors in the process of travel experience co-creation • Alternative forms of tourism represent a steadily growing market segment growing faster than any other does
Environmental issues	<ul style="list-style-type: none"> • Epirus is well placed to benefit from the rise of concern over environmental issues and environmental quality Europe-wide • Epirus can exploit the growing interest in organically produced food
Government policy	<ul style="list-style-type: none"> • The aim of the Greek government and “EOT” are to support the sustainable development of rural communities by developing alternative forms of tourism and less seasonal ones • Public authorities are dedicated to the development of sustainable tourism • State funding tourism’s sector transformation

	Threats
Competition	<ul style="list-style-type: none"> • Epirus' Rural Tourism is lagging to other competitive Greek regions such as Peloponnese and Thessaly (Pilio) • Strong European competitors in rural tourism such as France, Italy, Spain, Portugal • Rural tourism is rapidly developing in neighboring countries like Bulgaria and Croatia • Domestic economic recession and uncertainty • High taxation reduces the Greek tourism industry competitiveness
Market trends	<ul style="list-style-type: none"> • The lack of unambiguous framework, knowledge, and experience in the development of sustainable tourism • Creative Industries in Greece are not yet activated in providing creative tourism experiences, supporting innovative approaches to tourism development and marketing, and recreating the image of destinations • Lack of contemporary tourism packages
Environmental Issues	<ul style="list-style-type: none"> • The lack of strategic planning in tourism development can provoke excessive and unregulated tourist exploitation, destroying the natural beauty of the region
Government policy	<ul style="list-style-type: none"> • Non-operational and low funded public DMOs • The absence of an institutionalized framework for the development of a sustainable tourism model • The absence of an appropriate control mechanism to prevent delinquent behaviour in the industry that distorts the market and hinder competition • The Greek bureaucracy

Epirus for developing as a tourist destination it should decide first which model of tourism to follow, thus, the traditional or the alternative (sustainable) one. Throughout the above analysis, it is evident that besides the coastal areas, the mainland also has the potential to receive revenues from tourism since it is qualified with resources adequate and proper for the development of alternative forms of tourism. The region should no longer be considered as four different regional units but as one, forming a tourism destination with a strong identity. The estimated benefits of this will be:

- Expanding the region's visitation all over the year.
- Differentiation of tourism activities (i.e., of the tourism product).
- Awareness of destination and established a unique character.
- The attraction of high-income, educated and sophisticated tourists with high respect for the natural and cultural resources of the territory.
- Minimizing environmental impacts.
- A rewarding experience for visitors and locals.
- Creation of sustainable and high-quality jobs.
- Increasing the contribution of tourism to the local economy.

3.4 *Current Alternative Forms of Tourism in Epirus*

Table 3 presents the alternative forms of tourism that are evolving in the Region and identifies ecotourism, educational-cultural tourism, and religious tourism as the dominant forms.

3.5 *Stakeholders Involved in Region*

The UNWTO (2005b) survey on the implementation of the Global Code of Ethics for Tourism, identifies as stakeholders in the tourism sector, the following:

- national governments,
- local governments with specific competence in tourism matters,
- tourism establishments and tourism enterprises, including their associations,
- trade unions of tourism employees,
- tourism education and training centers,
- travelers, including business travelers, and visitors to tourism destinations, sites, and attractions,
- local populations and host communities at tourism destinations through their representatives,
- other juridical and natural persons are having stakes in tourism development including non-governmental organizations specializing in tourism and directly involved in tourism projects as well as in the supply of tourism services.

Among others, the role of the following national, regional and local tourism stakeholders in Epirus is reported briefly. Their contribution is crucial to the implementation of sustainable tourism development.

- Governmental agencies and institutions such as the Ministry of Tourism and the Greek National Tourism Organisation. Their role is to establish the general institutional background and provide the policies required for tourism development. Further, they are engaging in the provision of funds, as well as technical knowledge and expertise to the local community for the successful implementation of tourism projects (Nastase et al. 2010).
- The office of WWF in Greece although it is operating on the national level, it serves the tourism development focusing on the ecotourism in the region through its local office in Western Zagori. Its purpose is to raise environmental awareness both within the local community and among the visitors. Moreover to provide guidance, education and training, technical expertise and sometimes even financial support (Nastase et al. 2010).
- On the regional level, the most significant stakeholders are the regional authorities and development agencies (Nastase et al. 2010).

Table 3.3 Forms of alternative tourism in the Epirus Region

Form of Alternative Tourism	Komitisa	Zagori	Metsovo	Tzoumerka-Arachthos	Amvrakikos	Acherontas	Kalamas	Ioannina
Rural tourism	♦	♦	♦					
Ecotourism	♦	♦	♦	♦	♦	♦	♦	
Special Sea Tourism					♦	♦		
Winter tourism (Skiing)	♦		♦					
Adventure tourism	♦	♦	♦			♦	♦	
Inherent tourism		♦			♦	♦		♦
Spa tourism	♦				♦			
Sport tourism								♦
Educational-Cultural Tourism	♦	♦	♦	♦	♦	♦		♦
Religious tourism	♦	♦	♦	♦	♦	♦	♦	♦
Congress tourism			♦					♦
Exhibition tourism								♦
City tourism					♦			♦

Source: Information Leaflets of EOT – LRAs of Region cited in the Region of Epirus' (2015) operational programme

- Finally, the educational institutions conducting relevant research, providing new technologies and cultivating qualifying workforce supports the future evolution of tourism in the region.

3.6 Epirus' Vision

Epirus can be developed as one of the first three continental Greek destinations, providing to its visitors unique and authentic experiences from its wide range of heritage monuments, natural and cultural resources. The wild, awe-inspiring but also relaxed and sunny features of the Region result to a destination that is fascinating to visit during all seasons.

Epirus' main mottos

- Epirus for all seasons. Keeps you alive.
- My Epirus destination for every season.
- Epirus: Breathtaking Greece.

Goals

- The four regional units to be integrated as one destination.
- Established destination's unique character. Destination of 4 seasons.
- Grow destination awareness through integrated marketing activities.
- Ensure that the growth of tourism is in harmony with the community, the environment and the commitment to support sustainable tourism.
- Minimizing environmental impact.
- New resources markets (outside the national borders).
- The region's seasonality to be extended.

Target markets

- Domestic market.
- Neighboring countries, such as Balkan and other eastern countries, Turkey and Italy.
- Other European countries.
- Israel.

3.7 Strategic Direction

The current market trends and the intense competition insist on

- The rejuvenation and diversification of tourism product.
- Targeting segmented markets.
- Positioning in the international market.

- Develop effective marketing communication.

Region's aim to evolve as a tourism destination for all seasons is not easy to be achieved. The SWOT analysis revealed many weak spots of Epirus and potential threats of its external environment. The region should implement destination management in which the collaboration of all stakeholders is prerequisite. The initial step is universal acceptance by every one of the same vision. Then, the region increases the possibility to become a visitor's destination for every season. The evolution of alternative forms of tourism in Epirus is serving this goal. Although Stakeholders' agreement is crucial, it is not sufficient in turning the destination one of the top Greek mainland destinations.

The critical factor in planning tourist strategies, especially for attracting "alternative" visitors is the policymakers to reveal their needs (usually psychological ones like inspiration) and satisfy them through the co-creation of tailor-made tourist products, services, and experiences. The designing of an unforgettable experience is significant in becoming "instant" tourists more "permanent" (Chang et al. 2014). The satisfied visitors can be the region's evangelists promoting more efficiently the destination (WOM) than other means (media travel). The region should provide tourist packages that trigger the visitors' interests. Objects of supply could be found in sports and cultural facilities, encouraging visitors into driving, walking or visiting traditional towns and making journeys for experience and discovery. Key to tourism supply is the growing awareness that tourists participate in the production of their product, by their cultural capital, expertise, emotions, experience (Prentice and Andersen 2007). This interaction will act as supportive to visitor's decisions to travel again to the destination. If Epirus succeeds in implementing these strategies, then it will raise the numbers of visitors. Therefore, the region will maximize the tourism sector's contribution to the regional economy.

4 Concluding Remarks

Epirus as the most Greek Regions has not yet established a Tourism Destination Image. This fact, constraints its tourism development in the sense that Epirus being unable to maximize the economic benefits of tourism, it retains low the contribution of the sector to the total of its economy. An increase in tourism revenue would also serve as a way of confronting the negative impact of the prolonged domestic recession. Therefore, it is substantial for the region to elaborate a destination development plan for improving its position in the domestic tourism market and acquire for the first time a market share in the international one.

In the SWOT analysis, on the one hand, the main issues that hinder Epirus tourism destination development were identified, on the other hand, region's strengths and opportunities giving birth to a destination vision and strategy recommendations were recorded. The planning of the destination development is a serious, painful and tricky process as many stakeholders of the region are involved interesting in serving only

their interests. The leading and coordinating DMO should be able to negotiate, to claim, to persuade or to make concessions, providing an adequate level of satisfaction to all involved members. This ability is crucial for proceeding to the actual development of a sustainable plan. Well-structured, incorporating marketing strategies, detailed and efficient budgeted plan, aiming at the well-being of society will provide the framework under which Epirus will become a tourism destination with a distinct tourism destination image.

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