



LEONARDO DA VINCI PROGRAMME

**ECO-ROUTE. – A ROUTE TO SUSTAINABLE RURAL DEVELOPMENT THROUGH  
ECOTOURISM LABELLING**

# **NATIONAL SURVEY REPORT GREECE**

*DRAFT*



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## **1.0 Introduction**

### ***1.1 Aim of the report***

The aim of this report is to provide a record of the natural and cultural resources of the Prefecture of Thesprotia and present the results of the survey of ecotourism activities and businesses in the pilot region, so that the feasibility of introducing a labelling system for selected activities and services can be assessed. The survey investigated the experiences, attitudes and aspirations of entrepreneurs involved in ecotourism activities, in order to draw an action plan for ecotourism labelling, so that a training package may be put together to help entrepreneurs appreciate and apply the criteria for ecotourism certification.

More specifically, the survey conducted in the pilot region aimed at providing the project team with the following information:

- a realistic record/inventory of natural and cultural resources and activities suitable for ecotourism development in the pilot area;
- a record of the businesses involved in their delivery;
- an assessment of current demand and practice of ecotourism in the pilot region as perceived by local businesses and individuals involved in ecotourism (i.e. tour operators, local tourist service providers, professional guides, representatives of NGOs and training organisations that advocate environmental protection and ecotourism development, etc);
- information on designated protected areas within pilot regions that require special environmental studies for the introduction of new (tourist) activities.

### ***1.2 Methodology***

The sources for the report of ecotourism activities and businesses/individuals involved in their delivery were: published material; face-to-face interviews with competent officials of the local authorities and competent government services and other key individuals involved in ecotourism; face-to-face, fax, e-mail and telephone interviews with local entrepreneurs, professionals and individuals involved in ecotourism or with an interest in it, based on the questionnaire prepared for the survey of ECO-ROUTE Work Package 3 (see Annex).

In total, 37 interviews were conducted, involving:

- Discussion with two officials, the first from the General Secretariat of Tourism and the second from the Hellenic Organisation of Certification;
- Face-to-face and telephone interviews with four specialised tour operators, who organise excursions all over Greece;
- Telephone conversations with a WWF expert on alternative, mild forms of tourism;

- Face-to-face interviews with representatives of four collective bodies (Hellenic Federation of Mountaineering and Climbing, a local Club for the Study and Protection of the Environment, the local Sailing Club and members of a Hand Gliding Association in the pilot region);
- Face-to-face interviews with three participants in the training seminars organised by the Prefecture on the theme “Guards for the Environment Protection”;
- Face-to-face interviews with 23 local entrepreneurs and guides involved in ecotourism activities in the pilot area.

Moreover, about 40 questionnaires were distributed via e-mails and faxes to local tour operators in the pilot region, specialised tour operators all over Greece, and other NGOs, collective bodies and tourist associations with a very poor return rate.

### ***1.3 Structure of the report***

The report is divided in three parts, as follows:

1. Part A includes an inventory of the activities that are pursued in the Prefecture of Thesprotia, the resources available for these activities and the businesses involved in their servicing, drawn by secondary and primary sources from desk research and contacts with key individuals who have a good knowledge of ecotourism in the area.
2. Part B includes the analysis of the findings from the questionnaire survey of local businesses and individuals involved in ecotourism (tour operators, guides, accommodation providers etc) through face-to-face, fax, e-mail and telephone interviews. The questionnaire sought to record businesses profiles; current demand for ecotourism; practices of ecotourism that are met in the region and principles and standards applied in service provision; and the service providers’ evaluation of the prospects and potential problems with respect to the application of an ecotourism labelling system; their wish to be certified, the criteria the ecotourism label should include and the interviewees’ recommendations for promoting the area as an ecotourism destination.
3. Part C draws the conclusions of the report, including an assessment of the need for and feasibility of introducing an ecotourism labelling system in the pilot region, in order to provide input for the synthesis report on the implementation of ecotourism labelling in each participating region. A provisional list of the items for consideration in order to prepare the action plans is also included.

**PART A - COMPILATION OF AN INVENTORY OF THE ACTIVITIES THAT ARE PURSUED  
IN THE PILOT AREA, THE RESOURCES AVAILABLE AND THE BUSINESSES  
INVOLVED**

**A.1 Inventory of existing ecotourism activities in the pilot area**

The ecotourism activities offered in the pilot region, at varying degrees of development, take place mainly in the coastal areas, the rivers and the mountains. More specifically:

- The most popular activities along the coastal areas of the Prefecture are: a) swimming, b) amateur fishing, c) marine canoe, offering the opportunity to visit isolated beaches and small caves, d) sea sports and sailing including jet ski, renting of ships/yachts etc. In Parga there is also a licensed Dive Park promoting marine exploration.
- Along the estuaries and fluvial systems of the Kalamas and Acheron rivers that run through the pilot region, visitors can observe the flora (biodiversity) and fauna (ornithology, etc); opportunities for amateur rafting, canoe and kayak throughout the whole year, amateur fishing, hiking and horse riding are offered mainly in the Acheron river.
- The mountains offer opportunities for hiking, trekking, climbing, horse riding and hunting, which is allowed by the Greek authorities between August and February. The mountain close to Filiates is popular among hunters for wild boar game. The sources of Acheron are also offered for climbing. In Paramithia, there is a take off strip for hand gliding and an active Hand Gliding Association which has organised a Pan-Hellenic hand gliding competition a few years ago.
- There are archaeological and cultural monuments of great value in the area and on occasions, cultural clubs or locals with a deep knowledge of the area's history organise ad hoc archaeological and cultural tours.

**A.2 Record of natural and cultural resources in the pilot area – designated protected areas**

The natural assets of the pilot region include:

**A. Coastal areas**

The coastal areas in the Prefecture of Thesprotia are mainly those of Perdika, Igoumenitsa, Sagiada, Syvota and Parga (Parga is actually in the Pref. of Preveza but geographically close to Thesprotia). The coasts have very clean waters and beaches with the EC blue flag. The Municipalities of Parga and Syvota are designated as saturated areas for tourism development, a designation that prevents the construction of tourist accommodation units. The order has failed to prevent the sprawling of unauthorised units in Parga, whereas in Syvota it has been allegedly forced due to a mistake of a previous Municipal Council. Many coastal areas, like Sagiava, Syvota and Parga, have areas designated as “Natura 2000” sites.

### ***B. River estuaries and fluvial systems***

Banks of outstanding natural beauty can be found along the rivers Kalamas and Acheron that run through the pilot region. The rivers and their estuaries create wetlands of very rich biodiversity and are protected under Greek and European laws (Natura 2000). In the Acheron estuary there is the ancient “oracle of the dead” which attracts many visitors and there is a hiking path leading to the breathtaking mountainous area of Souli. There are Environmental Studies which specify and delineate land uses and allowable activities within the protected area’s limits. The Greek law dictates that ecotourism activities should be promoted in protected areas and any proposals must be assessed and approved by the Agencies formed for their protection.

### ***C. The Recreation Park of Perdika***

Spreading from the Karavostasi beach and alongside the Paramithioti river, the Perdika’s recreation park features astonishing natural beauty and offers shelter to wild animals in a 20 Ha area. The park includes four artificial wetlands for the stock farming of fishes, birds and rare kinds of butterflies and there are two observatories. The visitors have the opportunity to walk on the paths alongside the river, crossing picturesque bridges and resting in the numerous kiosks of the park. The park stretches between two mountains which shape a scenic gorge, offering an ideal setting for hiking and trekking.

### ***D. Lakes***

There are three lakes in the pilot region and the most renown one, known as “the lake with lily pads”, is the Kalodiki lake located between Parga and Morfati villages. The lake with its small island and magic scenery is protected by Greek and international conventions and belongs to the Natura 2000 network. The Prefecture has commissioned the conduct of Environmental Studies which specify and delineate protected areas and allowable activities within their limits.

### ***E. Caves***

There are several caves in the pilot area and the most renown one is close to the village Psakas; the cave has been marked as exceptional by the Hellenic Speleological Association, but has not yet been explored and cannot be easily visited. There is another interesting cave in the mountains of Paramithia, also not easily accessible. Some tourist service providers and tour operators organise day excursions to the Perama cave in the adjoining Prefecture of Ioannina.

### ***F. Mountainous hinterland***

In the mountains there is a signed, hiking path starting from the sources of Acheron, which is part of the network of international paths in the Pindos Mountain range; there is another hiking path in Paramithia, linking a Byzantine and a Venetian castle close by the village. There are also two not very well signed and maintained paths in

Syvota, passing through interesting monuments and ancient settlements. In Igoumenitsa, there is a hiking and cycling path that links the town to the nearby Drepanon peninsula.

The cultural resources include:

#### ***A. Archaeological monuments***

There are discoveries of human presence in the pilot area dated back to the Palaeolithic season (200.000-35.000 B.C). Thesprotoi, the first Hellenic-speaking tribe has peacefully settled in around 2.000 B.C. There are several officially declared archaeological sites, some of which have particular archaeological value, but most are not accessible or there are no organised visiting tours offered. The Greek Ministry of Culture is currently implementing a programme to make the most important monuments visitable during summertime, by 2005.

#### ***B. Byzantine, Post Byzantine and Venetian Monuments***

There are many officially declared Byzantine monuments (600-1453 A.C.) and post-Byzantine monuments (1453-1830 A.C.), such as churches, monasteries, castles, etc, most of which can be visited but are not properly developed to offer sightseeing tours. There are also a few Venetian monuments in Parga, Syvota and Paramithia.

#### ***C. Traditional settlements of architectural interest***

There are seven settlements designated by the Ministries of Culture and/or of Environment, Planning and Public Works as traditional in the pilot region, most of them mountainous and some very close to Igoumenitsa (approximately 20 minutes drive).

#### ***D. Bridges***

Due to the morphology of the pilot region with its rivers and river branches there are several old bridges constructed by traditional craftsmen of Epirus, highly admired by engineers and visitors. The most remarkable bridges, however, are located in other Prefectures of the Region of Epirus (i.e. Ioannina and Arta).

#### ***E. Museums***

There is no archaeological museum and many artefacts are exhibited in the Ioannina and Athens museums, or abroad (Metropolitan Museum of New York). There are though a few interesting folk art museums in the pilot region.

#### ***F. Folklore***

There is rich cultural tradition in the pilot region from the different tribes that have settled in. There are plenty of colourful social events and religious celebrations organised throughout the year, which attract many day visitors from neighbouring towns and villages.

### **A.3 Record of businesses involved in the delivery and support of ecotourism activities**

It follows from the earlier discussion that the area is rich in natural and cultural resources that are suitable for the development of ecotourism. However, most entrepreneurs offer accommodation or other tourist services (food, travel agencies etc) and there are very few enterprises that concentrate on ecotourism activities, such as horse riding, rafting and hiking.

More specifically, there are two entrepreneurs in Glyki who organise rafting tours, for up to groups of 50-60 people, in the Acheron river and there is also a professional rafting, monoraft and kayaking guide in the Town of Igoumenitsa who organises excursions for the local sanatorium of drug addicts or other small groups on request. In Glyki, horse riding tours are offered from an entrepreneur who has 10 Hungarian horses and organises also overnight stays in tents, on request. There are also two equestrian clubs in the pilot area (in the villages of Paramithia and Mesovouni) that organise activities and events mainly for their members. In Paramithia, the local Hand gliding association organises lessons on request, but this is a rather unorganised activity targeted mostly to the members of the association. Sailing and a limited range of sea sports are offered by entrepreneurs mainly in Parga, and to a lesser extent in Syvota, where there is also an organised thematic water park with a small marina for tourists day-visiting from the island of Corfu. Some hotel owners in Syvota have mini-buses and organise day hiking tours for their customers on request. Finally, in Parga there is a designated diving park and professional instructors offer scuba-diving lessons and rental of the appropriate gear.

Also, several entrepreneurs, professionals or cultural clubs offer to visitors or their customers some activities, such as participation in farmers/shepherds life, traditional craft courses, archaeological and cultural tours, only on request and they neither market such tourist products properly nor organise them regularly. As discussed above, there are very few qualified guides in rafting, kayaking and diving in the area. Major shortfalls seem to be the lack of basic infrastructure, the short tourist season, the lack of incentives and subsidies by central government for the promotion of ecotourism activities and poor safety standards (it is very difficult to get customers insured against most of these activities).

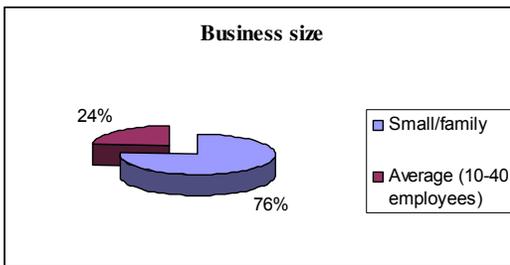
Finally, representatives from the Committee of Countryside Activities of the Hellenic Association of Tourist and Travel Agencies (HATTA), which comprises 12 of the most active tour operators organising “adventure tourism” packages, noted that such activities are pursued in the surrounding Prefectures and mainly Ioannina which is better equipped with infrastructure, is very rich in natural and cultural assets and is more easily accessible. There are no tour operators specialised in ecotourism activities in the Prefecture of Thesprotia (there are a few in the Prefecture of Ioannina only).

**PART B. RESULTS FROM THE SURVEY OF BUSINESSES AND INDIVIDUALS INVOLVED IN ECOTOURISM ACTIVITIES IN THE PILOT AREA**

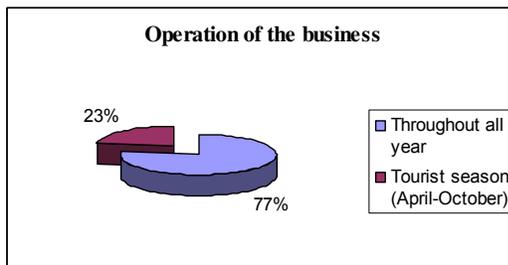
**B.1 Profile of businesses and individuals interviewed**

In the survey conducted in the pilot region, 7 tour operators, 7 accommodation providers, 8 guides and 6 other (restaurant owners, thematic water park owner, representatives of NGOs and training organisations) were interviewed. The majority of the businesses, as shown in the pie charts below (Tables 1 and 2), were small, family-run (76%) and operating throughout the whole year (77%), although it must be stressed that many are open, off summer tourist season, only during weekends and depending on demand. Also, several of those classified as of average size are so, because of the employment of seasonal staff in the tourist season peak.

**Table 1**

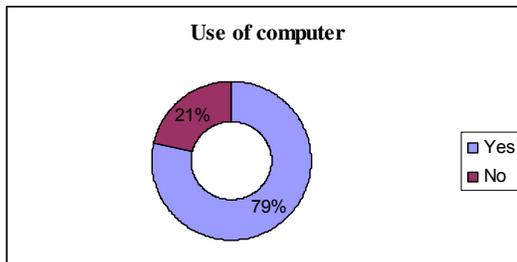


**Table 2**

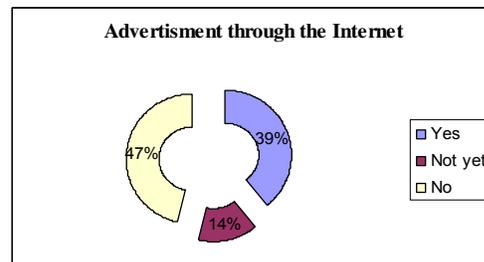


The majority of the interviewees (79%, Table 3) use computers for filing, management and accountancy; it must be noted that some of the interviewees are not very competent with computers but are assisted by others. Only half of those that use computers use the Internet to market their activities. However, the response rate obtained for advertisement in the Internet (39%, Table 4) does not refer exclusively to entrepreneurs who have their own websites but also include a few who are advertised in the Region's/Prefecture's websites or other collective bodies' websites. 14% of the interviewees however, stressed that they are currently creating their own websites or are planning to do so in the near future.

**Table 3**



**Table 4**



Well over half of the interviewees are members of collective bodies, such as the Hellenic Association of Tourist and Travel Agencies (HATTA), other local Associations of Hotel Owners and Rented rooms and apartments’ owners, Chambers of Commerce etc.

## B.2 Current demand for ecotourism activities

Half of the interviewees replied a straight “yes” on the question whether there is ecotourism demand in the area as shown in the pie chart below (Table 5). A considerable proportion (39%) think there is small demand; they consider that the demand is hindered by the poor infrastructure and the lack of promotion of an integrated tourist package in the pilot region. Most entrepreneurs reported that their customers are mainly Greek, Greeks that live abroad or that there is an equal share between foreign and domestic tourists (Table 6). Entrepreneurs in popular coastal resorts like Syvota, noted that they have more foreigner tourists rather than Greeks. Some entrepreneurs explained that, on occasions, tourists inquire about opportunities to participate in farmers’/shepherds’ life, tracing snakes, etc.

Table 5

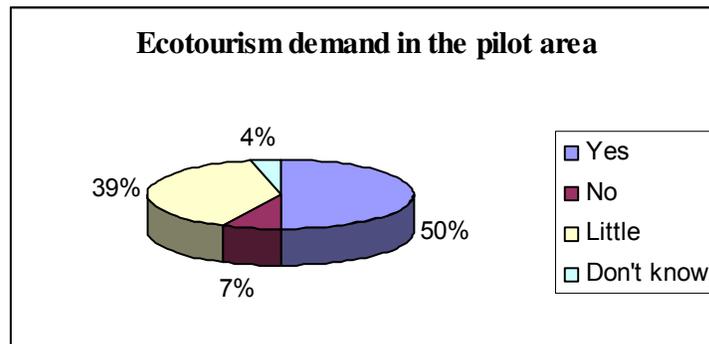
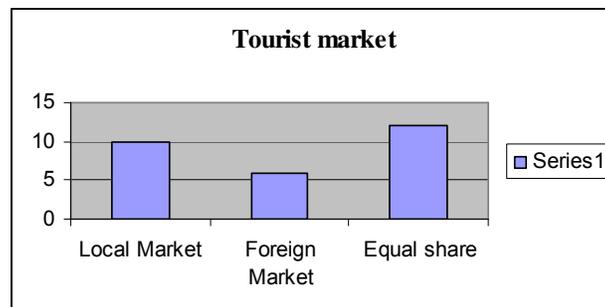


Table 6



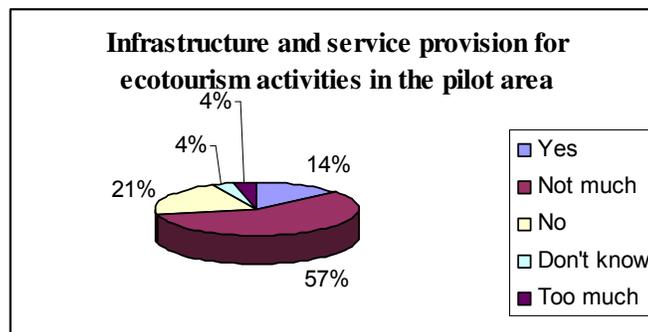
Also, specialised tour operators explained that there is little “retail” demand in the Greek market because of the “sea and sun” mentality on the one hand, and on the

other hand, the high cost of ecotourism activities. They explained that the cost is inevitably high because there is no steady market to justify investment in permanent installations at some popular destinations; as such, equipment and staff must be carried from their warehouses in Athens to wherever the activity takes place, rising costs per individual customer.

### B.3 Infrastructure and service provision for ecotourism activities in the pilot area

As can be seen in the pie chart in Table 7, most of the entrepreneurs and individuals interviewed (78% who responded “no” or “not much”) stressed that there is a gap in the provision of services for ecotourism activities and noted that unless incentives are given for private investment, complemented by major public funding for infrastructural improvements, the situation is bound to remain the same. It must be noted that, only a few of the entrepreneurs interviewed organise day excursions for their customers incorporating ecotourism activities, whereas most just offer information, on demand, and provided of course there are some ecotourism activities offered in the area.

Table 7



It is worth noting, that one of the specialised tour operators interviewed in Athens noted that there is overprovision of ecotourism services considering the relatively low demand of this kind of activities in Greece (there are about 12 specialised tour operators, many of whom have branches all over Greece). Specialised tour operators explained that they work mostly with companies, organising “incentive trips” for their employees (90% of their customers). All interviewees, however, believe that the ecotourism market is a growing one.

#### **B.4 Prospects**

The ecotourism activities that were recurring more often in the interviewees' responses, as offered in the area and having good potential for further development in the pilot region were hiking, cycling, canoeing, rafting and archaeological and cultural routes. They stressed however that better infrastructure (signing of paths, access roads, etc) and maintenance are needed. More than half of the interviewees also suggested that sound development potential exists in other ecotourism activities such as kayaking, horse riding, flora and fauna watching, mountaineering and climbing. Almost one third of the interviewees suggested that diving, hunting, sailing and participation in farmers/shepherds' life should be further promoted. And one fourth of the interviewees proposed that hand gliding and cave exploration could be promoted in the pilot area. A few suggested fishing, sea and winter sports, as well as the organisation and delivery of traditional craft, survival etc courses. Finally, two interviewees were very keen of the idea of offering ecotourism activities targeted to disabled.

#### **B.5 Perceived need for ecotourism certification - wish to be certified and trained - proposed criteria for ecotourism certification**

All interviewees expressed their wish to get trained in ecotourism labelling. As it is explained below, the majority perceived training as a very important criterion for quality in tourist services offered and as a very significant prerequisite for the effective promotion of their area as an ecotourism destination (see discussion in section B.7). The majority also stressed that quality of tourist services is a fundamental prerequisite for the promotion of ecotourism in their area and that central government should actively support the improvement of quality through the introduction of appropriate incentives. Overall, they appreciated the need for a recognised label to safeguard quality and safety in ecotourism activities and seemed keen to make efforts to adopt and implement it; they have highlighted, however, the importance of central government commitment and support (i.e. making available financial resources and special incentives).

The questionnaire (question 10) included a list of the criteria that are used for the ecotourism label "Nature's best" granted by the Swedish Ecotourism Association. These criteria are:

- 1 Respect nature and culture of the area;
- 2 Support the local economy;
- 3 Make all business's operations environmentally sustainable;
- 4 Actively contribute to conservation of the natural environment;
- 5 Promote training of staff and the spirit of exploration;
- 6 Promote quality and safety in all ecotourism activities.

Interviewees were asked to classify these criteria as either “very important” or “of less importance” criterion and/or suggest others not included in the list. The results obtained were analysed and tabulated in the following table (Table 8).

**Table 8: Proposed criteria for an ecotourism label**

Criterion	“Very Important” No of responses	%	“Of less importance” No of responses	%
1. Respect nature and culture of the area	24	86	4	14
2. Support the local economy	20	71	8	29
3. Make all business’s operations environmentally sustainable	26	93	2	7
4. Actively contribute to conservation of the natural environment	23	82	5	18
5. Promote training of staff and the spirit of exploration	18	64	10	36
6. Promote quality and safety in all ecotourism activities	22	79	6	21

As may be seen in the table above the criteria which concern the environment and its sustainability (i.e. criteria 1, 3 and 4), were perceived as very important; more specifically:

- Criterion 1 - respect nature and culture of the area (86% of the interviewees),
- Criterion 3 - make all business’s operations environmentally sustainable (93%),
- Criterion 4 - actively contribute to conservation of the natural environment (82%).

The 6<sup>th</sup> criterion, i.e. promote quality and safety in all ecotourism activities was also considered as very important by a large proportion of the interviewees (79%). Criteria 2 and 5, i.e. support the local economy and promote training of staff and the spirit of exploration were perceived as very important by approximately two thirds of the interviewees (71% and 64% respectively).

It must be noted that a bit more than 40% of the interviewees perceived all six criteria as very important. It is also noteworthy that although all interviewees expressed their wish to participate in the training seminars of ECO-ROUTE, 36% of the sample considered the 5<sup>th</sup> criterion as of less importance; this contradiction might have been the result of the inclusion in this criterion, apart from “promote training of staff”, of the aspect “promote spirit of exploration” too.

## **B.6 Existing ecotourism certification systems in terms of:**

### *i. Skills*

The majority of the interviewees were unaware of certification systems in skills. Out of the sample interviewed, one was a rafting guide (certified in the local school organised by a tour operator in the Voidomatis river in the Prefecture of Ioannina, and the French Federation of Rafting Guides); one, a gym instructor, was certified as a rafting, monoraft and kayaking guide by the German Federation of Kayaking; one,

was unofficially as yet a hand gliding guide (i.e. the last time that the Hellenic Federation of Hand Gliding organised training and granted certifications was in 1997); and a scuba-diving instructor. It must be noted that, as outlined in the report of ECO-ROUTE Work Package 2, there is no certification in rafting or other similar activities officially recognised by the Greek state; certifications are obtained from abroad (mostly France and Germany) or through the recently introduced training courses for rafting guides organised by HATTA. HATTA has so far organised one school for rafting guides, in which about 100 participants from all over Greece have been certified. Finally, the interviewee from the Prefectural Committee of Public Vocational Training in Thesportia, noted that there were recently training courses delivered for mountain escorts in cooperation with a local Mountaineering and Climbing Association; and for guards for the environment protection.

#### *ii. Facilities*

None of the interviewees was aware of a labelling system regarding facilities. Some reported that they have problems with getting insurance companies to insure their customers against accidents in ecotourism activities (because of the high risk of accident in some “adventure sports”, eg. hand gliding). The only one insurance company which agreed to provide insurance to the Paramithia Hand gliding Association, insisted on having the clients names one day in ahead. As such, in most occasions trainers ask their clients to sign a document withdrawing on their own will from claims for damages.

#### *iii. Equipment*

Basic equipment for rafting and other adventure sports is certified with ISO 9000 series. The horse riding enterprise in Glyki has a certificate issued by the Regional tourist police for insurance reasons. All the professional guides interviewed provide certified equipment and training (in case they are certified trainers) to their customers. Several interviewees have noted that under the current legal and regulatory framework in Greece, it is very expensive to obtain a mini-van license which would be the most appropriate means of transport for ecotourism activities in the pilot region.

### **B.7 Interviewees recommendations for promoting the area as an ecotourism destination**

Interviewees were invited to offer recommendations for the promotion of their area as an ecotourism destination. A list of suggestions was presented to them (question 11), including:

- 1 Promotion of an integrated tourist product of the area;
- 2 Better cooperation with tour operators;
- 3 More information to customers of ecotourism;
- 4 Introduce certification of businesses and individuals involved in ecotourism;
- 5 Training offered to businesses and their staff on ecotourism labelling.

Interviewees were asked to recommend which of the above they believe are more significant for the promotion of their area as an ecotourism destination, considering the local circumstances, and offer their own suggestions. The results obtained were analysed and tabulated in the following table (Table 9).

**Table 9 – Recommendations for the promotion of the area as an ecotourism destination**

Recommendation	% of interviewees
1. Promotion of an integrated tourist product of the area	82
2. Better cooperation with tour operators	64
3. More information to customers of ecotourism	75
4. Introduce certification of businesses and individuals involved in ecotourism	75
5. Training offered to businesses and their staff on ecotourism labelling	89

It must be noted that half of the interviewees commented that all the above preconditions/suggestions must be met for the effective promotion of their area as an ecotourism destination. The most popular recommendations were the provision of training in ecotourism labelling and the promotion of an integrated tourist product of the area (89% and 82% respectively). Interviewees noted that the area, like the whole of Greece, is a popular destination among tourists because of the “sea and sun” offer but only for a short season. As such, it is imperative that concerted efforts for the provision of infrastructure and training on quality are needed in order to prolong the tourist season, on the one hand, and promote the area as a destination that offers more than just “sea and sun”, on the other hand. Three quarters of the sample interviewed suggested that the provision of more information to customers of ecotourism (i.e. better marketing) and a recognised certification are prerequisites for the promotion of ecotourism in the pilot region. It must be noted that there seems to be a discrepancy in the responses obtained regarding the need for certification of businesses and the need for training in ecotourism labelling, in order to promote ecotourism in the area (i.e. 75% and 89% of interviewees, respectively). It is assumed that this is due to the reluctance of entrepreneurs to commit themselves in adopting and implementing an ecotourism label, unless public funding to support such a decision is made available; on principle, however, they are pro training to that effect.

Finally, two thirds of the interviewees (64%) recommended that better cooperation among tour operators is needed for promoting ecotourism. It must be noted that there is a bias here, given that 25% of the sample interviewed were tour operators who have largely claimed that there is good cooperation amongst them and with other entrepreneurs and individuals involved in ecotourism. However, other interviewees representing accommodation providers, guides etc stressed that there is indeed need for better cooperation with tour operators. The interviewee representing the Prefectural Committee of Public Vocational Training in Thesportia, noted that there is a Committee in the Prefecture concerned with the tourist promotion of the Prefecture of Thesprotia, to which tour operators are invited to participate and provide input. He stressed that the annual action plan devised by the Committee is disseminated to all interested individuals in the Prefecture but usually very little feedback is obtained by tour operators.

## **PART C. CONCLUSIONS AND ITEMS FOR CONSIDERATION FOR THE ACTION PLANS**

### **C.1 Conclusions - assessment of the need for and feasibility of introducing an ecotourism certification system in the pilot area**

This report aimed to investigate, on the one hand, the ecotourism activities offered in the Prefecture of Thesprotia and the potential of further expansion of the ecotourism product offered; and, on the other hand, assess the need for and the feasibility of introducing an ecotourism certification system (for selected activities) in the pilot region.

According to the discussion in part A, the natural and cultural resources of the pilot region are indisputably adequate for the promotion of ecotourism activities in the Prefecture of Thesprotia. Currently, there are piecemeal activities offered mainly in rivers and at the sea but it seems that they are not properly organised and marketed. Based on the inventory of the natural assets of the area, other ecotourism activities that could be promoted include: flora and fauna observation, participation in farmers/shepherds life, trekking, mountaineering, regulated fishing (perhaps with a “catch and release” mentality promoted) and cycling. Also, other activities already on offer, like rafting, horse riding, hiking, hand gliding, climbing etc could be further expanded, given that there is demand and only a few entrepreneurs are involved in their delivery. Also, as shown in section A.2, there are valuable cultural assets in the Prefecture of Thesprotia that could be explored and incorporated in archaeological and cultural routes, provided that proper access, lighting, signing, leaflets, marketing and other facilities were developed.

Moreover, according to the survey results presented in part B, there is a growing demand by tourists for ecotourism activities but rather limited provision of services and infrastructure. The survey has also shown that tourist service providers recognise the need to introduce new activities in order to prolong the tourist season. It was stressed in the interviews that an effective marketing strategy for the promotion of the area as an ecotourism destination, would further increase demand to accommodate larger service provision, and thus counteract the adverse effects of future competition expected among more entrepreneurs offering ecotourism activities.

There seems to exist however, major restraints in the form of poor infrastructure and limited financial resources. Local tour operators seem reluctant to pay for getting licenses for small vans and hiring qualified guides, a reluctance partially justified by the fear of inadequate demand. To overcome this, there is need to change the Greek’s mentality of holidays by the “sea and sun”, and promote environmental sensitisation and a spirit of nature exploration in customers’ choices and preferences. It is also fundamental that the state actively supports the promotion of ecotourism activities through funding and regulatory mechanisms, together with appropriate incentives to tourist entrepreneurs.

Another major point raised in the discussions with interviewees was that the introduction of a widely-recognised quality label requires big private investments. Consequently, it seems that safeguarding the commitment of entrepreneurs and other stakeholders involved in the label promotion and maintenance is not an easy task. Entrepreneurs and professionals need to be persuaded of the added value of adopting a quality label for skills and facilities. Some interviewees also argued that the Greek customers are not really concerned with quality labels but with the cheapest way to pursue an activity, regardless of safety and quality issues. Therefore, there is an issue of shifting customers' choices and preferences towards quality and safety in ecotourism activities, and this requires a gradual change of mentality that can only be achieved through environmental education at early stages. Also, according to the specialised tour operators interviewed there is limited tourist service provision locally, both in terms of quantity and quality, for large groups of visitors.

Finally, this report verifies the findings of the report of Work Package 2, which has concluded that the legal and regulatory framework for ecotourism development in Greece is vague, and in particular regarding certification there is a big gap. The report has shown that overall there are no skilled and certified guides, apart from a few who get licences or a certification from abroad or from non-formally recognised certification bodies in Greece. However, the interviews with representatives from several competent authorities, such as the General Secretariat of Tourism, the Hellenic Organisation of Certification, WWF, have clearly shown that they recognise the need for a reliable and widely-recognised quality certification system to be introduced and they are very keen in cooperating with ECO-ROUTE and disseminate the project results. It was also stressed by an employee of the Hellenic Organisation of Certification that a major difficulty in introducing a label, is devising quantifiable standards that can be monitored and evaluated against a set of appropriate indicators.

## **C.2 Items for consideration for the preparation of the action plans**

Based on the findings from this report a better understanding of the ecotourism market in the Prefecture of Thespotia has been gained. According to the ECO-ROUTE proposal, the national reports on the surveys conducted in each participating region will be presented in the synthesis report. The synthesis report will sketch the guidelines for the production of action plans for ecotourism labelling in each pilot area, specifying the activities that can be included in the certification system and the targeted companies and/or individuals that need to receive training to that effect. In this section a provisional list of items for consideration for the preparation of the action plans is included.

As discussed in the conclusions of this report, one of the major obstacles in designing the ecotourism label will be to persuade entrepreneurs and individuals involved in ecotourism of the added value from the adoption and implementation of the ecotourism label. Another major issue that must be carefully considered by the project

team is how effective monitoring mechanisms would be determined, in order to safeguard that entrepreneurs would not be “secured” behind the label and would continue to maintain and enhance quality after having been granted the quality label. As was argued by a few members of the Committee of Countryside Activities of HATTA, a quality certificate recognised by the state and granted to an entrepreneur would implicitly result in reduced quality in the longer term, because the entrepreneur, relying on the fact that his/her business has the label, would eventually compromise quality. For this reason, there needs to be revision of the label in regular intervals (say every 3 years or so), against clearly specified and quantifiable indicators.

It seems that the ecotourism activities in the Prefecture of Thesprotia which could be subjected to the pilot run of the training package for a quality and safety label in ecotourism, are those that are already on offer, i.e. rafting, horse riding, hiking, hand gliding, diving etc, given that few entrepreneurs are involved in their delivery. The targeted businesses and individuals who were interviewed recognised the need of a certification that would enhance quality, safety and their business prospects. The project team will invite some of these individuals to participate in the task force. The Swedish Ecotourism Association, using the conclusions and recommendations of the synthesis report, will provide an outline for the actions plans for each pilot area. The task force will be briefed in the findings of the reports of Work packages 2 and 3, will be presented with the guidelines for the preparation of the action plan and will be asked to actively contribute in its preparation. Hence, a training package leading to a recognised certification, in particular regarding skills and facilities related to ecotourism activities, can be put together focusing on the added value from the adoption and implementation of the ecotourism label.

The following table presents a provisional timetable and the tasks that must be fulfilled for the preparation of the action plan in each participating region.

**Time plan**

<b>What</b>	<b>Who</b>	<b>When</b>
National reports from the surveys of ecotourism activities and businesses in the pilot areas	HAS, CDIMM, Skogslandet, PRISMA	Early September 2004
Synthesis report	PRISMA	Early October 2004
Guidelines for the action plans for the training in ecotourism labelling	Swed. Ecotourism Ass.	End October 2004
Set up of local task forces	All partners	October 2004
Co-production with the local task force of each pilot area's action plan	HAS, CDIMM, Skogslandet, PRISMA, and local partners	November 2004
Finalisation of the training material	All partners	December 2004
Training delivery	Task forces with the assistance of local partners in each pilot area	January 2004

**SWOT analysis of the ecotourism sector in Thesprotia**

<b>Strengths</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Rich natural and cultural heritage</li> <li>• Awareness about need for improving quality in tourist services</li> <li>• Some experience in using labels to qualify services</li> <li>• A number of innovative and well equipped service providers</li> <li>• Protected area with rich flora and fauna</li> <li>• A few enthusiastic certified professionals</li> </ul>	<ul style="list-style-type: none"> <li>• Initiate a labelling system in ecotourism</li> <li>• Offer high quality tourist services</li> <li>• Prolong tourist season</li> <li>• Boost effective marketing and collaboration of tour operators</li> <li>• Identify niche markets with high added value</li> <li>• Promote the area as a tourist destination</li> <li>• Promote training in quality and safety of ecotourism activities</li> <li>• Expand tourist activities in the area</li> <li>• Contribute in the efficient operation of the Nature Park of Kalamas and Acheron Rivers in the pilot area</li> </ul>
<b>Weaknesses</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Poor accessibility</li> <li>• Short tourist season</li> <li>• Lack of an integrated tourist package</li> <li>• Defective cooperation among tour operators</li> <li>• Lack of programmes, events, initiatives</li> <li>• Entrepreneurs do not invest in training in an ecotourism labelling system</li> <li>• Local civil organisations are weak</li> </ul>	<ul style="list-style-type: none"> <li>• Unplanned development</li> <li>• Overuse of natural resources</li> <li>• Stagnating market</li> <li>• Weak partnership and collaboration with neighbouring areas to introduce an integrated tourist package</li> <li>• Entrepreneurs do not chase opportunities regarding ecotourism development</li> </ul>

**Annex**

**Questionnaire Survey of ecotourism activities in demand in the pilot area and the businesses involved in their delivery**

Name.....

We take this opportunity to assure you that all responses are strictly confidential. The outcome of this survey will enable the ECO-ROUTE project partners to specify the activities and criteria for an ecotourism certification system so that tourism development of your area can be better planned.

**1. How is your business involved in tourism?**

- |   |                          |
|---|--------------------------|
| Accommodation provider  | <input type="checkbox"/> |
| Tour operator   | <input type="checkbox"/> |
| Organiser of ecotourism or other activities related to alternative forms of tourism | <input type="checkbox"/> |
| Other ( <i>please specify</i> )   | <input type="checkbox"/> |
| .....   |                          |

**2. What are the activities of your business?**

.....

**3. From the list of ecotourism activities below please mark those you are organising or to which you are offering support for your customers?**

- |  |                          |   |                          |
|--|--------------------------|---|--------------------------|
| Flora and/or fauna watching              | <input type="checkbox"/> | Mountaineering                                    | <input type="checkbox"/> |
| Cave exploration                         | <input type="checkbox"/> | Rafting   | <input type="checkbox"/> |
| Bicycle tours                            | <input type="checkbox"/> | Sea sports  | <input type="checkbox"/> |
| Sailing                                  | <input type="checkbox"/> | Diving  | <input type="checkbox"/> |
| Participation in farmers/shepherds' life | <input type="checkbox"/> | Hand gliding                                      | <input type="checkbox"/> |
| Canoeing                                 | <input type="checkbox"/> | Ballooning  | <input type="checkbox"/> |
| Kayaking                                 | <input type="checkbox"/> | Archaeological routes                             | <input type="checkbox"/> |
| Fishing                                  | <input type="checkbox"/> | Cultural routes                                   | <input type="checkbox"/> |
| Hunting                                  | <input type="checkbox"/> | Ecotourism for disabled                           | <input type="checkbox"/> |
| Horseback riding                         | <input type="checkbox"/> | Painting, traditional craft, survival etc courses | <input type="checkbox"/> |
| Winter sports                            | <input type="checkbox"/> | Other ( <i>Please specify</i> )                   | <input type="checkbox"/> |
| Hiking tours                             | <input type="checkbox"/> |   |                          |

**3a. In what way do you offer support to your customers for the above activities?**

- Organising excursions
- Providing equipment
- Providing guide
- Training
- Other (*Please specify*)


**4. In your region, is there demand for ecotourism activities?**

.....

**Which ones?**

.....

**5. Is there satisfactory infrastructure and service provision for the development of this type of activities?**

.....

**From whom?**

.....

**6. Would you be interested in expanding your business to support (other) ecotourism activities?**

.....

**7. The activities you offer or support, are targeted to local or foreign markets, or both?**

- Mainly to local markets
- Mainly to foreign markets
- To both equally


**8. Are there qualified guides in your region for ecotourism activities?**

.....

**9. Do you know if there is any certification of ecotourism activities with respect to:**

- Skills and jobs
- Facilities (eg. accommodation)
- Equipment


*Please specify*,.....

**10. Which of the following criteria for ecotourism labelling do you consider more important (1 – very important, 2 – not so important?)**

- |   | 1                        | 2                        |
|---|--------------------------|--------------------------|
| 1. Respect nature and culture of the area                         | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Support the local economy                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Make all business's operations environmentally sustainable     | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Actively contribute to conservation of the natural environment | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Promote training of staff and the "spirit of exploration"      | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Promote quality and safety in all ecotourism activities        | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Other <i>(Please specify)</i>                                  | <input type="checkbox"/> |                          |

**11. In order to develop your area as an ecotourism destination which of the following do you consider more important?**

- |   |                          |
|---|--------------------------|
| 1. Promotion of an integrated tourist product of the area                       | <input type="checkbox"/> |
| 2. Better cooperation with tour operators                                       | <input type="checkbox"/> |
| 3. More information to customers of ecotourism                                  | <input type="checkbox"/> |
| 4. Introduce certification of businesses and individuals involved in ecotourism | <input type="checkbox"/> |
| 5. Training offered to businesses and their staff on ecotourism labelling       | <input type="checkbox"/> |
| Other <i>(Please specify)</i>   | <input type="checkbox"/> |

**12. Would you, or a member of your staff, be interested to participate in training courses in order to be certified in ecotourism?**

- Yes
- No

**13. Please, freely, write down any issues and comments regarding the promotion of ecotourism in your area.**

**DETAILS OF BUSINESS**

**1a. Do you employ staff in your business?**

Yes

No

**1b. How many? .....**

**2. The operation of your business is:**

	From	Until
Seasonal		
Throughout the year		

**3. Do you participate in any professional or other collective representation body (NGO)?**

Yes  *Please specify.....*

No

**4. Do you use a PC in your business?**

Yes

No

**5. Do you advertise your activities in the Internet;**

Yes

No

*If yes, please specify (own website, advertisement in the region's website, etc).....*