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SECTORAL STUDY

AGRO / RURAL TOURISM

Project Leader: Emmanouilidou Maria
Researchers: Toufengopoulou Anastasia & Milonas Sotirios

PLANNING AND IMPLEMENTATION: **AMERICAN FARM SCHOOL**

The program **NEW AGRICULTURE FOR A NEW GENERATION** is

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Agriculture · Environment · Life Sciences

New Agriculture for a New Generation:

Recharging Greek Youth to Revitalize the Agriculture and Food Sector of the Greek Economy

AGRO/RURAL TOURISM

Project Leader: Emmanouilidou Maria

Researcher(s): Toufengopoulou Anastasia & Milonas Sotirios

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List of Abbreviations

ASTEK: Higher School of Tourism Education of Crete

ASTER: Higher School of Tourism Education of Rhodes

ATM: Automated Teller Machine

B&B: Bed and Breakfast

COFRAT: Comite de Formation des Ruraux aux Activities du Tourisme in France

CR: Concentration Ratio

CRM: Customer Relationship Management

DMO: Destination Management Organization

EAFRD: European Agricultural Fund for Rural Development

ECEAT: European Centre for Ecological and Agricultural Tourism

e.g.: for example

EOPPEP: National Organization for the Certification of Qualifications and Vocational Guidance

EPAnEK: Operational Programme "Competitiveness, Entrepren eurship & Innovation" etc: and other things

EU: European Union

EUR: euro

GDP: Gross Domestic Product

GNTO: Greek National Tourism Organization (EOT)

HACCP: Hazard Analysis Critical Control Point

HATTA: Hellenic Association of Travel and Tourist Agencies

HCH: Hellenic Chamber of Hotels

ICT: Information & Communication Technologies

i.e. : it is

IEK: Private Institutes of Professional Training

IOBE: Foundation for Economic and Industrial Research

ISO: International Organization for Standardization

IT: Information Technology

ITEP: Institute for Tourism Research and Forecasts

KEK: Vocational Training Centers

LEADER: "Liaison Entre Actions de Développement de l' Économie Rurale", meaning Links between the rural economy and development actions

MICE: Meetings, Incentives, Conferences, and Exhibitions/Events

n.d.: no date

No: Number

NSRF: National Strategic Reference Framework (ESPA)

NUTS: Nomenclature of Territorial Units for Statistics

OECD: Organisation for Economic Co-operation and Development

OPAAX: Integrated Rural Development Programs

PDO: Protected Destination of Origin

PSR: Piani di Sviluppo Rurale

SEAGE: Hellenic Agrotourism Federation

SETE: Greek Tourism Confederation

SMEs: Small and Medium-sized Enterprises

SMTEs: Small and Medium-sized Tourism Enterprises

trn: trinity industries Inc

TTCI: Travel & Tourism Competitiveness Index

UK: United Kingdom

UNTWO: United Nations World Tourism Organization

USA: United States of America

vs: versus

WWF: World Wide Fund for Nature

WYSE: World Youth Student and Educational Travel Confederation

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Executive summary in Greek & English

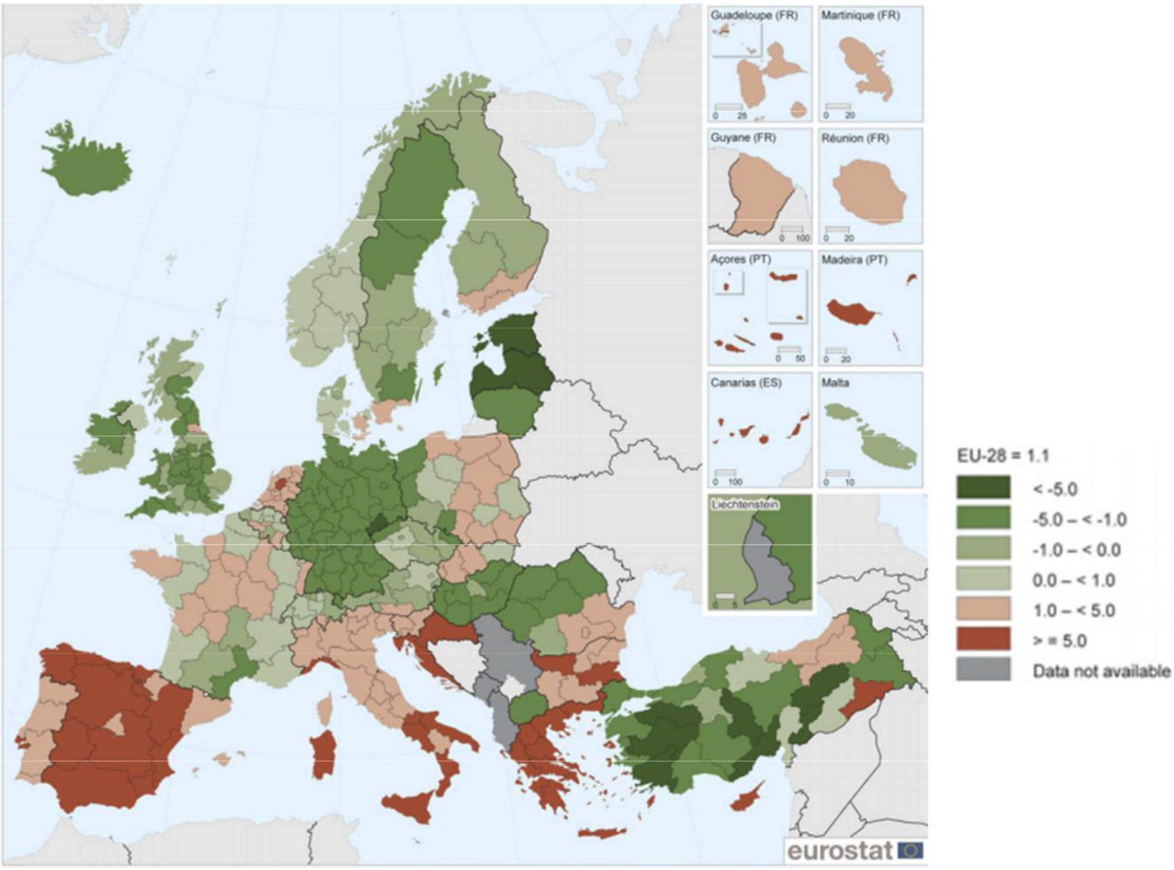
Στόχος της έρευνας ήταν η διερεύνηση των δυνατοτήτων που υπάρχουν στην Ελλάδα για την ανάπτυξη του αγροτικού τουρισμού και ο προσδιορισμός των βασικών προϋποθέσεων και κρίσιμων παραγόντων επιτυχίας, προκειμένου η αγροτουριστική επιχείρηση να είναι βιώσιμη. Η μεθοδολογία περιελάμβανε βιβλιογραφική έρευνα και έρευνα πεδίου, σχετικά με το μέγεθος του τομέα (συμπεριλαμβανομένων των χαρακτηριστικών των επισκεπτών και των ανερχόμενων τάσεων), τα εμπόδια εισόδου, τα νομικά θέματα, τις δεξιότητες που απαιτούνται, καθώς και τις ευκαιρίες χρηματοδότησης. 27 συνεντεύξεις με επιχειρηματίες και εκπροσώπους ενδιαφερόμενων μερών πραγματοποιήθηκαν. Όλοι οι επιχειρηματίες πιστεύουν ότι ο τομέας θα αναπτυχθεί στην Ελλάδα, αναφέροντας ως ανερχόμενες τάσεις τις υπαίθριες δραστηριότητες αναψυχής και τις δραστηριότητες που σχετίζονται με τη γαστρονομία, τον πολιτισμό και τη σωματική και ψυχική υγεία. Αυτή η άποψη υποστηρίχθηκε από το γεγονός ότι όλοι οι επιχειρηματίες περιλαμβάνουν την επέκταση της επιχείρησης στα μελλοντικά τους σχέδια, είτε ως υποδομές ή ως προσφερόμενες υπηρεσίες. Ωστόσο, οι επιχειρηματίες θεωρούν ότι πρέπει να επενδύσουν σε δράσεις ηλεκτρονικού εμπορίου και δικτύωσης, με τρόπο ώστε οι επιχειρήσεις τους να γίνουν μέρος ενός τοπικού ή εθνικού αγροτουριστικού προορισμού, ενώ πιστεύουν ακράδαντα ότι θα πρέπει να εκπαιδευτούν σε διάφορα επιχειρηματικά θέματα, δεδομένου ότι στις περισσότερες περιπτώσεις, είναι υπεύθυνοι για όλες τις αποφάσεις που λαμβάνονται στην επιχείρηση.

The objective of this research was to investigate the potential that exists in Greece for the development of agro/rural tourism and to identify the basic pre-conditions and critical success factors in order for an enterprise to be viable. The methodology included desk and field research on sector's size (including visitors' features and trends arisen), as well as on entry barriers, legal issues, skills required, and funding opportunities. A total of 27 interviews with entrepreneurs and representatives of stakeholders took place. All entrepreneurs believe that the agro/rural tourism sector will grow in Greece, suggesting that market trends concern leisure/outdoor activities and activities related to gastronomy, culture, and physical and mental health. This point of view was supported by the fact that all entrepreneurs include expansion of enterprise in their future operational plans, either regarding the infrastructure or the offered services. However, entrepreneurs consider that they must invest on e-marketing and networking actions, in a way that they will be become part of a local or national agro/rural tourism destination, as well on training on entrepreneurial aspects, since in most cases, they are responsible of all the decisions taken.

1. Introduction and aims and/or objectives

At the onset of the financial and economic crisis in 2008 there were 16.8 million unemployed persons in EU-28. Five years later – in 2013 – this figure had risen to 26.1 million, an overall increase of 9.3 million persons (or an increase of 55.5%); the latest data available shows that the number of unemployed persons in the EU-28 fell by 1.5 million in 2014. The highest unemployment rates in 2014 among the EU Member States were recorded in Greece (26.5%), Spain (24.4%), Croatia (17.3%) and Cyprus (16.1%) (European Union, 2015). The unemployment rate increased by at least 10 percentage points between 2009 and 2014 in all but one of the Greek regions; the exception being South Aegean region (Figure 1).

Figure 1: Change in unemployment rate, persons aged 15-74, by NUTS level 2 region (2009-2014) (percentage points difference between 2014 and 2009)

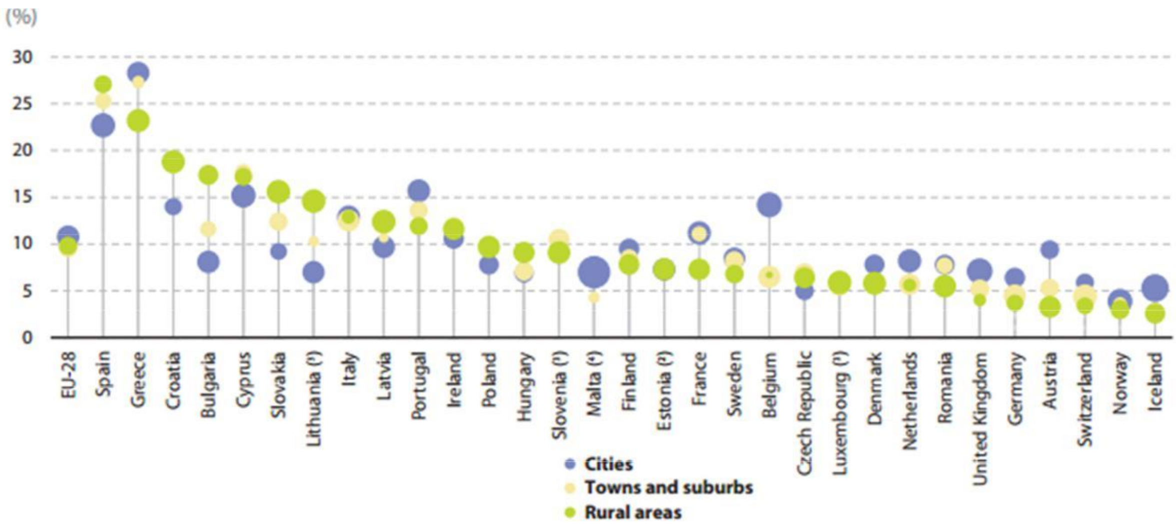


Source: European Union (2015), Eurostat regional yearbook 2015

In recent years, young people aged 15-24 were disproportionately affected by the downturn in economic fortunes and the shrinking labor market, as the financial and economic crisis made it harder for young persons to enter or stay in labor market. The overall number of youths in the EU-28 who were unemployed rose from 4.2 million in 2008 to peak at 5.1 million in 2014, accounting for approximately one fifth (20.7%) of the total number of unemployed persons. Regarding the youth unemployment rate, meaning the number of unemployed persons aged 15-24 divided by the economically, active population for the same age group, among the EU Member States, the highest youth unemployment rates in 2014 were recorded in Spain (53.2%), Greece (52.4%), Croatia (45.5%) and Italy (42.7%) (European Union, 2015).

However, according to Figure 2 which presents information on the unemployment rates, by degree of urbanization, it seems that in 2014 there was a relatively small difference in unemployment rates according to this classification for the EU-28 as a whole, with the highest rate recorded for densely populated areas (cities) at 10.8%, while the rate for thinly populated areas (rural areas) was approximately a single percentage point lower. In Greece, the difference between these two rates was just over 5 percentage points (European Union, 2015).

Figure 2: Unemployment rate, persons aged 15-74, by degree of urbanization (2014)



Source: European Union (2015), Eurostat regional yearbook 2015

According to European Commission (December, 2015a), many rural areas have used the magnetic pull of nature, peace and quiet and improved amenities to achieve a net influx of population from towns and cities. Employment rates are pulling out of the trough of 2009-2011 (the employment rate in EU rural areas rose from 62.5% in 2011 to 64.3% in 2014). And social ties are often stronger in the countryside, which in some cases makes it easier to launch common initiatives and shared endeavors.

Agro/rural tourism has a potential to play a significant role in the development of European Union regions, contributing to employment and wealth creation, sustainable development, and enhanced cultural heritage, since it cuts across many economic activities: services to tourists include the provision of accommodation, gastronomy (for example, restaurants or cafes), transport, and a wide range of cultural and recreational facilities (theatres, museums, leisure parks). Indeed, agro/rural tourism can be particularly important in remote, mountainous, peripheral regions, especially since declining agricultural incomes and changes to agricultural support systems place pressure on farmers and rural dwellers to diversify activities. Moreover, the market for agro/rural tourism has been changing, with a greater interest in health and activity holidays and more concern for the environment.

Greece with the great construction of the dispersion of the Polynesian setting, the changing landscape and diverse climatic conditions, the rich historical, architectural and cultural heritage satisfies the conditions for a more wide-scale development of rural tourism. Additionally, nowadays in Greece young people are looking for a way out in the countryside by developing small business in rural areas. Furthermore, the signs of saturation of the classic tourism model are becoming obvious and the benefits began to balance problems, so it is clearer that new outlets and tourism development models must be pursued.

The need for implementing this study raised from two main factors: first, the lack of reliable entrepreneurial tools for the development of viable agro/rural tourism enterprises; and secondly to empowerment of business initiatives oriented to agro/rural tourism activities. More specifically, the objectives of the research were: a) the increase of agro/rural tourism existing enterprises efficiency; b) the encouragement of young people to deal with agro/rural tourism; c) the impression of sector’s profile in Greece (positive and negative criteria) and the reshaping of its approach by stakeholders; d) the use of results as guidance tool by potential entrepreneurs and public or private authorities responsible for rural development; and e) the dynamic integration of new technologies to strengthen existing enterprises and enhance the establishment of new ones.

2. Methodology

The project was conducted with a methodological approach aimed at identifying and analyzing the growth potential of the sector as well as the prerequisites to entrepreneurial success (critical success factors).

Desk research took place for evaluating the demand for agro/rural tourism activities in Greece as well as for the investigation of entry barriers and legal issues and for assessing the knowledge and skills required for starting and operating an agro/rural tourism enterprise. Sources used, in print and/or electronic format, include:

- Books / Book chapters
- Articles in scientific journals such as International Journal of Tourism Research, TOURISMOS, Tourism Management, Tourism and Hospitality Management, Tourism Management Perspectives etc.
- Reports / studies by organizations / institutions of the public and private sector, professional organizations of tourism and non-governmental environmental organizations at national and global level (World Tourism Organization, official institutions of the European Union, Greek Ministry of Tourism, European Federation of Rural Tourism, Greek Tourism Confederation-SETE, Institute for Tourism Research and Forecasts-ITEP, World Wide Fund for Nature-WWF etc.)
- Presentations in conferences
- Inventories of the Hellenic Statistical Authority and the Eurostat.
- Doctoral theses, graduate and undergraduate work concerning alternative forms of tourism, with emphasis on agro/rural tourism.

However, lack of statistical data and poor records regarding demand and number of businesses specializing in agro/rural tourism, exists, due mostly to the absence of national agro/rural tourism institutional framework in Greece (including both Hellenic Tourism Organization-GNTO and the Hellenic Chamber of Hotels-HCH, the Hellenic Association of Travel and Tourist Agencies-HATTA, and other relevant with tourism organizations, as well as to the nature of agro/rural tourism and visitation, the integration of many parts of the sector within other sectors, but. A number of tourists take part in more than one form of tourism on any given trip, and often on any given day. A family might visit a church in the morning, enjoy culinary tourism in the village at lunchtime, ride a heritage tourism railway in the afternoon, include a visit to a nineteenth century woolen mill as part of that ride, and then spend the night in a small lodge, which is however registered in the official authorities as a hotel enterprise. Additionally, visitor purchases in village and small town shops are not differentiated form local people's purchases while in terms of jobs, the prevalence of pluriactivity in the agro/rural tourism sector – (o ne person working in more than one job, and often in jobs in more than one sector) – m akes accurate assessment of job numbers difficult.

For these reasons, field qualitative research took place as well, since this technique focuses on collection of data from a relatively small number of respondents by asking questions and observing behavior. Personal in-enterprise interview was used as a survey method, in order to deal with complex questions which required clarifications through discussion and instant feedback. The interviews were semi-structured, since they provided both flexibility and direction, and consisted in the existence of open-ended questions (Appendix 1) mainly, which formed the core of each topic and allowed recording relevant but not provided answers, which helps in-depth approach to the issues under investigation (Tsartas et. al., 2001).

The questions concerned a) enterprise data; b) evaluation of demand and trends; c) assess of critical entrepreneurial factors; d) evaluation of entry barriers; e) assess of knowledge and skills needed; f) potential of synergies with other sectors; and g) tools of marketing and e-marketing.

As regards the selection of rural regions for the primary research, in order to investigate the study objectives, two sub-criteria were considered: a) their morphology, and b) the level of development of sectors of tourism generally and agro/rural tourism.

Based on these criteria, the following regions were selected:

- mainland-mountainous region close to cities, with low level tourism development (i.e., agro/rural tourism features): Leukochori (Central Macedonia)

- mainland-mountainous region, with low level tourism development (i.e., agro/rural tourism features): Ano Poroia (Central Macedonia)
- mainland-tableland region, with high level tourism development (i.e., mass tourism features): Lake Plastira (Thessaly)
- mainland-tableland region, with developing tourism (i.e., mass and agro/rural tourism features): Messinia (Peloponnese)
- mainland-tableland region, with low level tourism development (i.e., agro/rural tourism features): Lake Vegoritida (Western Macedonia)
- island region, with high level tourism development (i.e., mass tourism features): Crete

Interviewees were selected according to the type of their agro/rural tourism enterprise/service (e.g. (accommodation; catering; leisure activities; winery; farm) and according to researchers' belief that they will meet the requirements of the study, sampling technique that tends to be used in industrial markets quite regularly, even though judgement (purposive) sampling technique incorporates the risk of sampling error (Shukla, 2008). 21 interviews with entrepreneurs active or interested in the agro/rural tourism sector took place during October 2015, while in order to evaluate prospects/potential that exists for agro/rural tourism sector in Greece, representatives of 6 different stakeholders (bank organization, agrotourism federation-private body, funding programmes managing authority, Ministry of tourism, Municipality, and non-profit organization) were interviewed during the same period (Figure 3, Appendices 2 & 3).

Figure 3: Geospatial distribution of interviews for agro/rural tourism study

Source: Field research (October, 2015)

At this point, it should be mentioned that the research team included one more member, Mrs. Vlachou Charisia, who participated in research design (selection of interviews and development of field research questionnaire) and in the realization of interviews with entrepreneurs but she resigned for personal reasons.

3. Desk research & analysis of results obtained from field research

3.1 Evaluation of prospects/potential that exist for agro/rural tourism sector

3.1.1 Tourism in the Greek Economy and Policy

Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure (World Tourism Organization, n.d.). Tourism is composed of a multitude of different products and services, which all have in common the fact that they are used by visitors and tourists during their trip. It differs noticeably from other industries since tourism is defined by visitor demand while other activities are mostly determined by the supply side.

Encouraging the development of the travel and tourism sector is all the more important today given its important role in job creation, at a time when many countries are suffering from high unemployment. The sector already accounts for 9% of global GDP, a total of EUR5.64trn, and it provides 120 million direct jobs and another 125 million indirect jobs in related industries. This means that the industry now accounts for 1 in 11 jobs on the planet, a number that could even rise to 1 in 10 jobs by 2022 (World Economic Forum, 2013).

Greece is a Mediterranean country on the archipelago with a rich economic, religious and intellectual activity that takes place in this area for more than three and a half millennia (Buhalis, 2001). Greece has been an attraction for international visitors since antiquity for its rich and long history, Mediterranean coastline and beaches (Gerrard, 2014). Greece launched its tourism in the international arena, which started flourishing in the early 1970s and in a slow but stable pace, Greece has today managed to become one of the most favorite tourism destinations among Europeans, Asians and Americans.

According to the 2015 Travel & Tourism Competitiveness Index (World Economic Forum, 2015), taking into account 14 pillars of competitiveness (e.g. policy rules and regulations; environmental sustainability; transport, tourism and ICT infrastructure; human, natural and cultural resources), Greece ranked at 31st position among 141 countries (32nd in 2013, 29th in 2011 and 24th in 2009) while in European level, Greece ranked at 18th position (22nd in 2013) since it has a strong national affection towards tourism in comparison to other European countries and generally open and positive attitude towards tourists. Even though TTCI indicators between 2013 and 2015 are not absolutely comparable, Greece in 2013 ranked at the 3rd place in regard to its tourism infrastructure (hotels per population; presence of major car rental; ATMs accepting Visa cards), at the 25th position on the basis of cultural resources (e.g. No. of World Heritage cultural sites; and No. of int'l fairs and exhibitions) and at the 40th place on the basis of natural resources (e.g. No. of World Heritage natural sites; and quality of the natural environment) while in 2015, Greece ranks at the 32th position on the basis of cultural resources and at the 46th place on the basis of natural resources (World Economic Forum, 2015, 2013) (Table 1 and Figure 4).

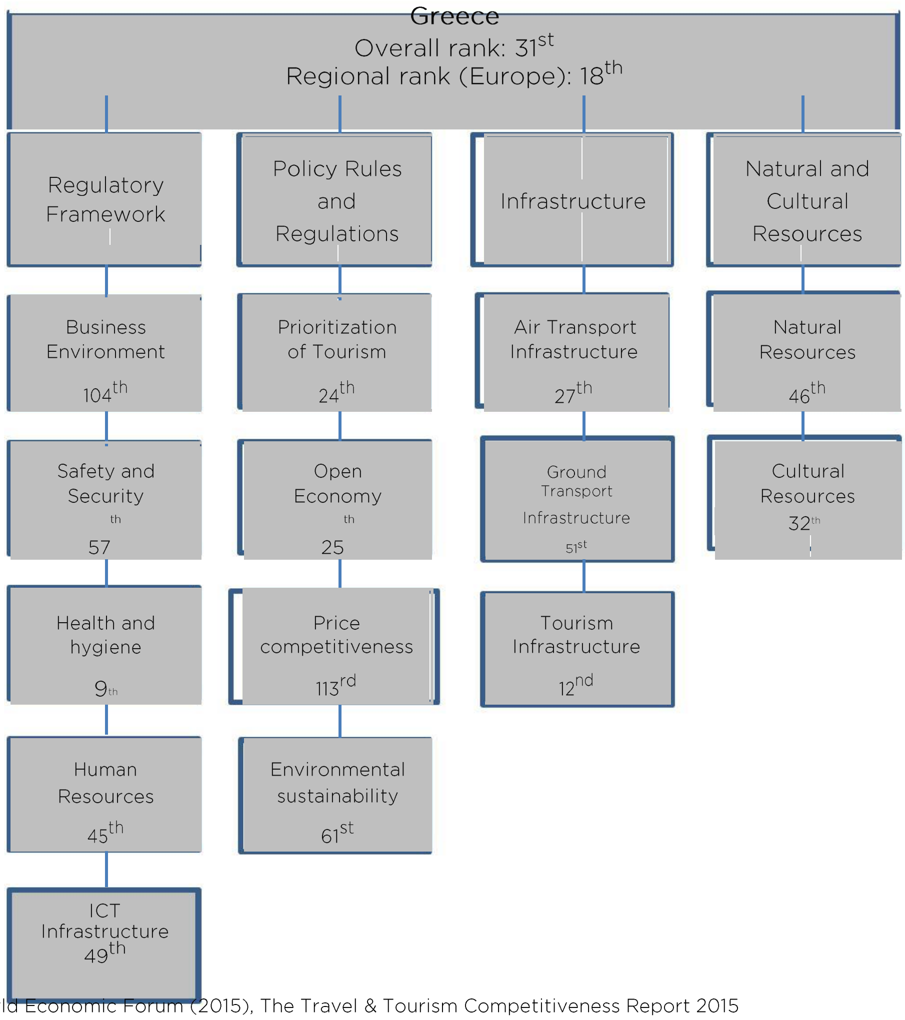
Table 1: The Travel & Tourism Competitiveness Index 2013: Europe

	OVERALL INDEX			SUBINDEXES: T&T regulatory framework		SUBINDEXES: Business environment and infrastructure		SUBINDEXES: T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	1	5.66	1	5.94	1	5.42	2	5.63
Germany	2	2	5.39	8	5.57	6	5.29	7	5.31
Austria	3	3	5.39	2	5.80	11	5.11	9	5.24
Spain	4	4	5.38	14	5.48	5	5.30	6	5.36
United Kingdom	5	5	5.38	17	5.44	10	5.13	3	5.57
France	6	7	5.31	9	5.56	7	5.18	11	5.20
Sweden	7	9	5.24	12	5.54	23	4.89	8	5.30
Netherlands	8	13	5.14	16	5.45	15	5.01	16	4.97
Iceland	9	16	5.10	3	5.77	13	5.06	36	4.47
Finland	10	17	5.10	5	5.74	22	4.89	24	4.65
Belgium	11	18	5.04	18	5.43	26	4.78	18	4.90
Ireland	12	19	5.01	7	5.68	19	4.96	40	4.41
Portugal	13	20	5.01	20	5.42	27	4.78	19	4.84
Denmark	14	21	4.98	25	5.31	16	4.98	26	4.64
Norway	15	22	4.95	11	5.55	28	4.77	33	4.53
Luxembourg	16	23	4.93	21	5.41	20	4.96	39	4.42
Malta	17	24	4.92	15	5.47	14	5.06	49	4.22
Italy	18	26	4.90	50	4.90	29	4.76	14	5.05
Cyprus	19	29	4.84	22	5.35	21	4.89	46	4.27
Estonia	20	30	4.82	10	5.55	30	4.72	51	4.19
Czech Republic	21	31	4.78	28	5.24	37	4.49	28	4.61
Greece	22	32	4.75	39	5.02	33	4.65	30	4.58
Croatia	23	35	4.59	42	4.99	39	4.43	42	4.37
Slovenia	24	36	4.58	33	5.12	35	4.52	52	4.11
Hungary	25	39	4.51	26	5.29	49	4.16	54	4.08
Montenegro	26	40	4.50	34	5.09	50	4.14	47	4.26
Poland	27	42	4.47	49	4.92	58	3.94	32	4.56
Turkey	28	46	4.44	64	4.62	52	4.08	27	4.63
Latvia	29	48	4.43	35	5.08	40	4.40	77	3.81
Lithuania	30	49	4.39	41	4.99	48	4.19	61	3.98

Source: World Economic Forum (2013), The Travel & Tourism Competitiveness Report 2013

* 1st column shows the rank within the region of Europe and 2nd column shows the overall rank out of all 140 economies included in the Index this year. The 4th, 5th and 6th columns show the 3 broad categories of variables (subindexes) that facilitate or drive travel and tourism competitiveness.

Figure 4: The Travel & Tourism Competitiveness Index 2015: Greece



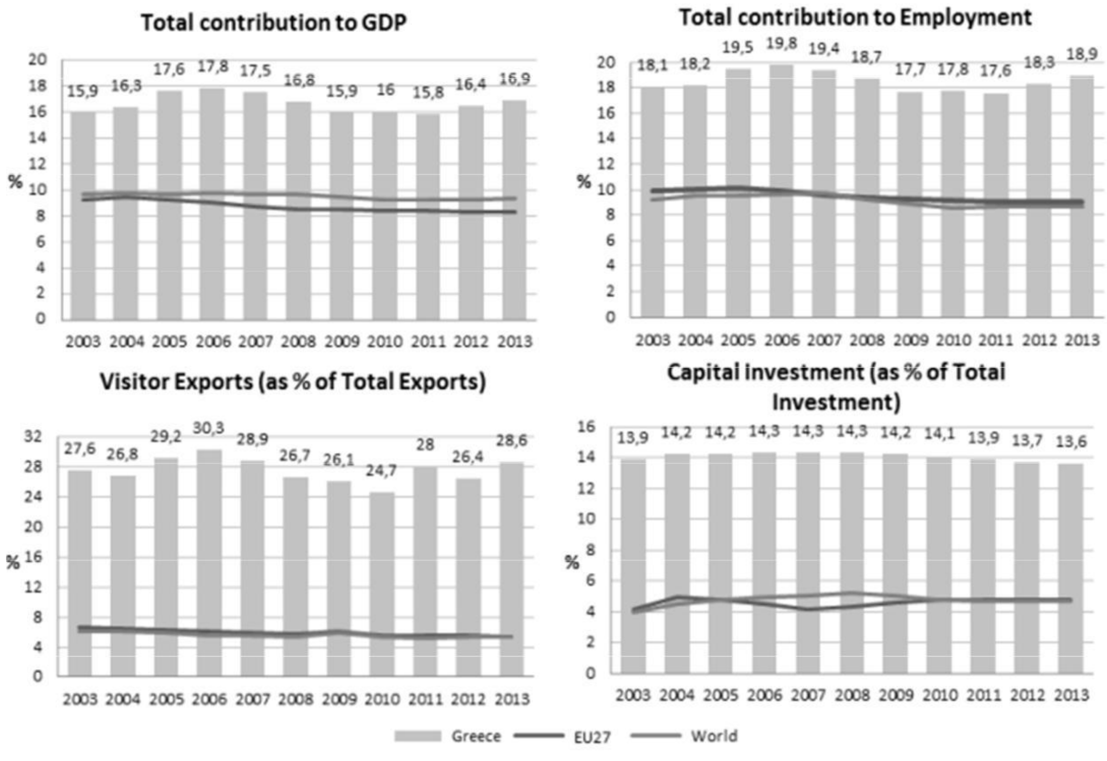
Source: World Economic Forum (2015), The Travel & Tourism Competitiveness Report 2015

Although Greece slipped down for ten positions since 2008, when it ranked 22nd among 130 countries, generally it remains competitive in certain areas. While it faced a decline on the field of rich cultural resources (from 15th position in 2007 to 25th in 2013), Greece has improved its tourism infrastructure (from 9th place in 2008 to 3rd in 2013) (Guduraš, 2014).

Tourism sector, in relative terms, represents an important part of the Greek economy since it has direct, indirect and induced impacts on different economic activities, thus spreading through entire economy. According to World Travel & Tourism Council (2015), in 2014, the total contribution of tourism to GDP (including wider effects from investment, the supply chain and induced income impacts) amounted to EUR29.4bn (or 17.3% of national GDP; World 10.0%), showing a decline in terms of the total amount but a raise in terms of percentage of GDP in relation to 2012, when the entire contribution of tourism to GDP amounted to EUR 30.3bn (or 16.4%). Greece ranked 41st among 184 countries taking into consideration tourism's contribution to economy (40th during 2012). The total contribution of tourism to employment in 2014 accounted for 700.000 jobs (689.000 jobs in 2012) or 19.4% of total employment (18.3% in 2012), including jobs indirectly supported by the industry. The share of receipts from international tourism arrivals in total exports in 2014 was 24.5%, which is equal to EUR 12.2bn (26.4% and EUR 11.4bn in 2012). The share of capital investments in tourism amounted to 13.7% of total investment, showing no difference as a percentage in relation to 2012 but a small decline in terms of money, since in 2014 it was EUR2.8bn while in 2012 it was EUR3.1bn.

However, it is worth to mention, that the share of capital investment in tourism is the only indicator which has been declining for the fifth consecutive year, from the occurrence of the economic crisis in Greece - the other indicators have otherwise declined after 2008 (Figure 5), but they eventually improved in 2014, as mention above.

Figure 5: Main indicators of Tourism's contribution in Greek economy (%) for the period 2003–2013



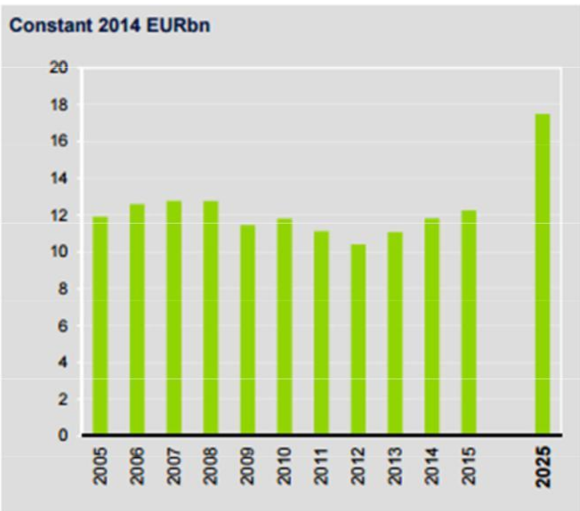
Source Guduraš D. (2014), Economic crisis and touri sm: Case of the Greek tourism sector

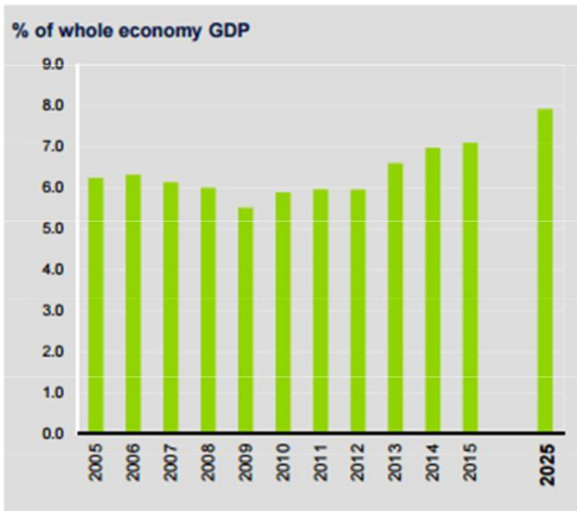
According to Alpha Bank (2015), the strong performance of the tourism sector continues in the first seven month period of 2015, as tourist arrivals increased by 14.2% against 20.8% in the corresponding period of the previous year while, over the same period, travel receipts increased by 6.2%, albeit at a slower pace than in the corresponding period of 2014 (+12.1%). However, despite the decelerating increase registered in January-July 2015, especially in July 2015 as a result of the capital controls imposition, travel receipts in absolute terms, reached the highest level of the past years, standing at EUR7.0bn from EUR 6.6bn in the corresponding period of 2014, respectively.

Moreover, according to the business expectations of Foundation for Economic and Industrial Research-IOBE (Alpha Bank, 2015), even though the Index of Business expectations in hotels and restaurants was on a declining trend since April 2015, recording a significant decrease in July 2015, to 86.3 units from 98.4 units in June 2015 and 108 units in July 2014, this downward trend was significantly reversed, reaching 101.5 in September 2015.

And it seems that travel and tourism's impact on the economic and social development of Greece will be significant, since World Travel & Tourism Council (2015) forecasts that total contribution of industry to GDP will rise by 3.7% pa to EUR43.8bn (19.8% of GDP) in 2025 (Figure 6) while the total contribution of travel and tourism to employment will rise by 2.7% pa to 951.000 jobs in 2025 (22.2% of total) (Figure 7).

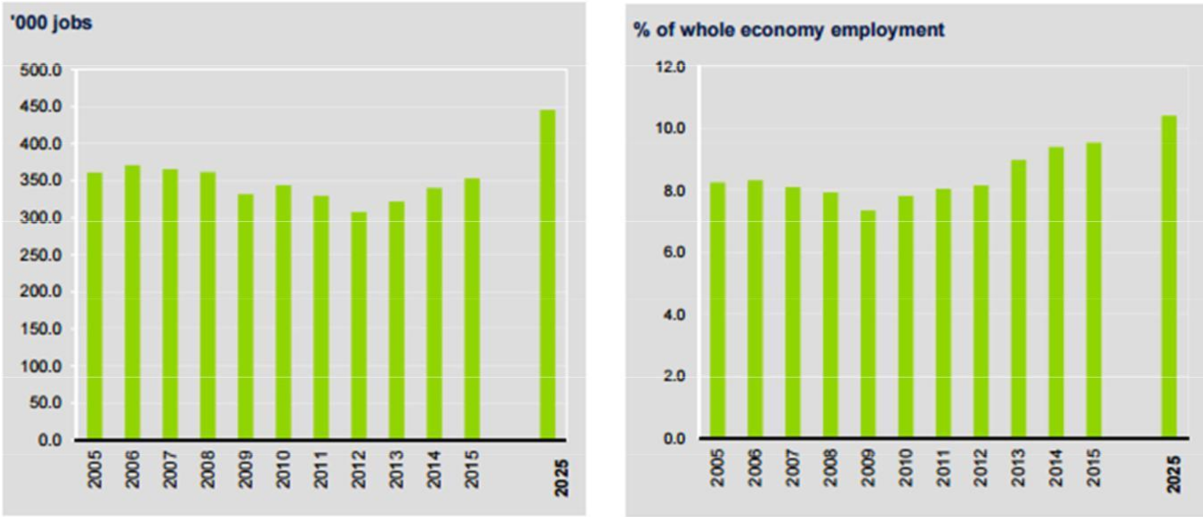
Figure 6: Direct contribution of Travel & Tourism to GDP





Source: World Travel & Tourism Council (2015), Travel & Tourism Economic Impact 2015 - Greece

Figure 7: Direct contribution of Travel & Tourism to employment



Source: World Travel & Tourism Council (2015), Travel & Tourism Economic Impact 2015 - Greece

Depending on the purpose of travel in 2014, 94.1% of the direct contribution of tourism to GDP (EUR20.7bn) resulted from leisure travel spending, while spending on business travel accounted for 5.9% or EUR1.3bn of tourism's contribution. Leisure travel spending is expected to grow by 3.8% pa to EUR31.3bn while business travel spending by 6.7% pa to EUR2.6bn in 2025.

In terms of country of origin, 57.0% represented foreign tourist expenditure in 2014, while domestic tourist expenditure accounted for 43.0%, which is not a negligible share, and both size expect to grow in 2025, by 2.2% and 3.0% (or EUR11.3bn and EUR16.7bn) respectively (World Travel & Tourism Council, 2015). As for tourists from different European countries, the Germans still have the largest share as a percentage of inbound tourism (11.2%) with second British (9.5%). The shares, however, of both nationalities had significant decrease in 2014 compared to 2013, as was the case in 2013/12 (Table 2). The biggest decrease (-11.8%) recorded the Germans followed the British with a decrease of 8%. A significant decrease was observed in 2014 in the share of Russians (-24.8%), while growing dynamic show shares of Chinese tourists (61%) and Brazilians (55%) (Research Institute for Tourism, 2015).

Table 2: Non-resident arrivals in Greece (inbound tourism) by country of origin (2012, 2013, and 2014)

Countries	2012	2013	2014	% 2013/12	% 2014/13	Share 2013	Share 2014
I. Europe	13.867.164	15.788.397	19.477.049	13.9%	23.4%	88.1%	88.4%
European Union	9.792.910	10.525.226	13.249.459	7.5%	25.9%	58.7%	60.1%
Austria	236.416	236.476	285.132	0.0%	20.6%	1.3%	1.3%
France	977.376	1.152.217	1.463.157	17.9%	27.0%	6.4%	6.6%
Germany	2.108.787	2.267.546	2.459.228	7.5%	8.5%	12.7%	11.2%
UK	1.920.794	1.846.333	2.089.529	-3.9%	13.2%	10.3%	9.5%
Spain	155.722	91.988	136.232	-40.9%	48.1%	0.5%	0.6%
Italy	848.073	964.314	1.117.712	13.7%	15.9%	5.4%	5.1%
Netherlands	478.483	580.867	657.339	21.4%	13.2%	3.2%	3.0%
Poland	254.682	385.474	588.712	51.4%	52.7%	2.2%	2.7%
Portugal	20.483	13.304	14.206	-35.0%	6.8%	0.1%	0.1%
Romania	230.396	278.873	543.360	21.0%	94.8%	1.6%	2.5%
Sweden	319.756	368.834	337.771	15.3%	-8.4%	2.1%	1.5%
Czech Republic	289.034	286.974	347.624	-0.7%	21.1%	1.6%	1.6%
Finland	154.134	139.341	166.251	-9.6%	19.3%	0.8%	0.8%
Switzerland	*299.619*	*346.518*	*377.077*	15.7%	8.8%	1.9%	1.7%
Norway	*294.114*	*264.816*	*246.136*	-10.0%	-7.1%	1.5%	1.1%
Russia	*874.787*	*1.352.901*	*1.250.174*	54.7%	-7.6%	7.5%	5.7%
II. Asia	937.050	1.213.148	1.411.665	29.5%	16.4%	6.8%	6.4%
Japan	8.841	13.141	18.698	48.6%	42.3%	0.1%	0.1%
China	12.203	28.328	47.482	132.1%	67.6%	0.2%	0.2%
Israel	207.711	212.466	197.009	2.3%	-7.3%	1.2%	0.9%
Turkey	602.306	831.113	976.758	38.0%	17.5%	4.6%	4.4%
III. Africa	37.411	30.905	49.043	-17.4%	58.7%	0.2%	0.2%
Egypt-Soudan	4.724	4.038	9.063	-14.5%	124.4%	0.0%	0.0%
South Africa	19.686	17.644	24.980	-10.4%	41.6%	0.1%	0.1%
IV. America	558.728	754.488	890.318	35.0%	18.0%	4.2%	4.0%
Brazil	31.125	27.355	52.217	-12.1%	90.9%	0.2%	0.2%
U.S.A.	373.831	466.520	591.853	24.8%	26.9%	2.6%	2.7%
Canada	102.694	186.701	145.720	81.8%	-22.0%	1.0%	0.7%
V. Oceania	133.368	142.642	205.387	7.0%	44.0%	0.8%	0.9%
Australia	117.852	129.112	183.080	9.6%	41.8%	0.7%	0.8%
VI. Total Non-resident arrivals (*)	15.517.622	17.919.580	22.033.463	15.5%	23.0%	100.0%	100.0%

Source: Research Institute for Tourism (2015), Development in Tourism and Greek Hoteliers 2014

*without cruises

Regarding the average spending per foreign tourist's travel, this fell by 8.7% in 2014 compared to 2013 and by 10.5% compared to 2012 and reached EUR551.8. This reduction in average spending per trip resulted in travel receipts increased at a lower rate (10.2%) compared with the increase in arrivals (Table 3).

Table 3: Average travel receipts of non-resident arrivals in Greece (inbound tourism) (2012, 2013, and 2014)

Year	Trimester	Spending per trip (€)	Change (%) in expenses when traveling in relation to the equivalent of trimester of last year	Expenditure per night	Average length of stay
2012		616.2		73.3	8.4
2013		604.2		74.6	8.1
2014		551.8		71.6	7.7
2012	I	413.4	-1.8%	60.5	6.8
	II	593.6	-5.0%	73.2	8.1
	III	687.2	-1.8%	74.2	9.3
	IV	461.7	-13.4%	74.3	6.2
2013	I	368.3	-10.9%	60.0	6.1
	II	613.6	3.4%	74.8	8.2
	III	657.7	-4.3%	75.5	8.7
	IV	468.7	1.5%	74.9	6.3
2014	I	374.2	1.6%	60.7	6.2
	II	577.6	-5.9%	73.7	7.8
	III	598.9	-8.9%	72.4	8.3
	IV	391.5	-16.5%	67.2	5.8

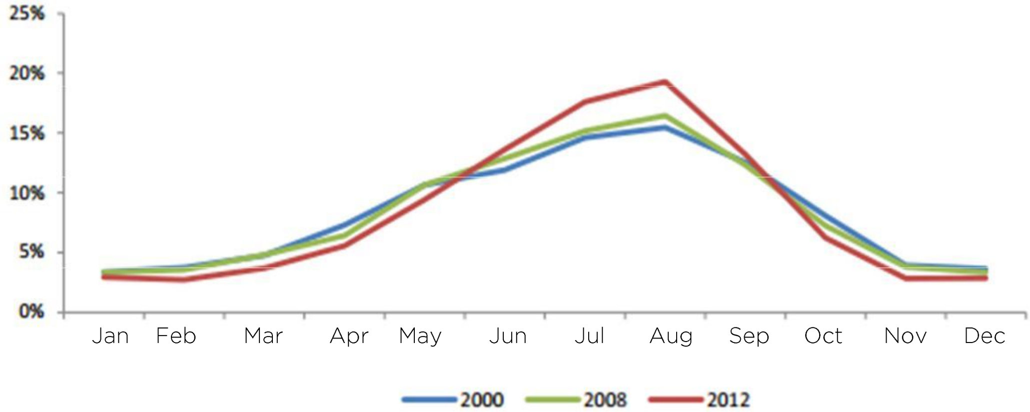
Source: Research Institute for Tourism (2015), Development in Tourism and Greek Hoteliers 2014

3.1.2 The phenomenon of Greek tourism seasonality

However, according to McKinsey&Company (2012) study on the definition of Greece's new growth model and strategy for the next 10 years, the tourist season in Greece is too concentrated in the summer months and tourist spend relatively less money in Greece that tourists visiting competing destinations (EUR146/day versus EUR200/day in Italy and EUR162/day in Turkey during 2009).

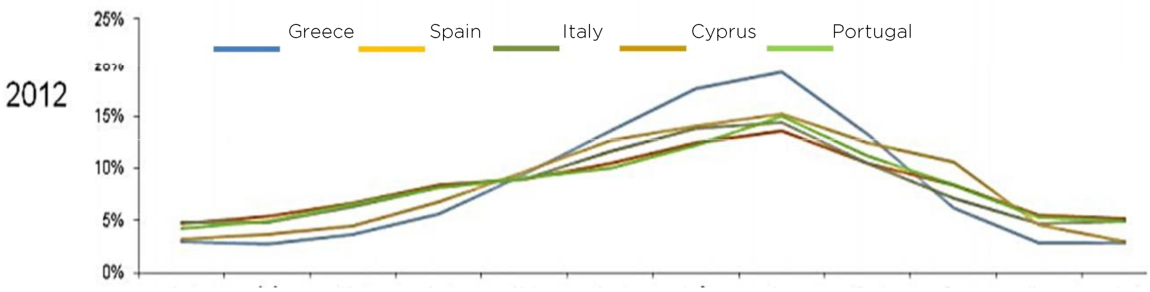
The phenomenon of seasonality is recognized as the most prominent feature of the tourism industry in Greece, while at the same time is considered as the most important problem that the industry faces. Indicatively during 2012 (Research Institute for Tourism, 2014), 63.72% of arrivals in tourist accommodations in Greece took place from June to September (Figure 8). Moreover, regarding competing countries of Greece, this percentage rises to 49.44% for Italy, 48.8% for Cyprus, 48.38% for Portugal and 46.91% for Spain and it appears that the seasonality of tourism in Greece is more pronounced than in other Mediterranean countries (Figure 9).

Figure 8: Monthly distribution of arrivals at accommodation in Greece (total arrivals)[23] (2000, 2008, 2012)



Source: Research Institute for Tourism (2014), Seasonality of Tourism in Greece

Figure 9: Monthly distribution of arrivals at accommodation in selected Mediterranean countries (total arrivals) (2012)



Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Source: Research Institute for Tourism (2014), Seasonality of Tourism in Greece

Regarding the regional dimension of the seasonality of tourism in Greece, and namely the seasonality of spending of foreign tourists, it is observed that regions/prefectures with higher seasonality, according to the concentration ratio CR4 (the share of tourism spending for months June-September to the total spending for the whole year) and CR6 (the share of tourism spending for months May-October to the total spending for the whole year), is the Ionian Islands, Crete and the South Aegean. Indeed, according to the index CR6, the share of foreign tourist spending in these regions amounts more than 95% of total annual expenditure. The region with the lowest indexes CR4 and CR6 are Attica, followed by the prefecture of Epirus (Table 4).

Table 4: Seasonality of spending of foreign tourists per prefecture in Greece (2013)

Prefecture	CR4 (June-September)	CR6 (May-October)
Eastern Macedonia and Thrace	73.11%	84.22%
Central Macedonia	73.19%	87.04%
Western Macedonia	73.81%	90.14%
Epirus	59.56%	73.74%
Thessaly	72.81%	86.30%
Ionian Islands	86.01%	96.72%
Western Greece	66.36%	84.50%
Central Greece	65.50%	86.97%
Peloponnese	67.37%	86.25%
Attica	52.46%	75.53%
North Aegean	70.57%	89.84%
South Aegean	80.33%	95.60%
Crete	77.99%	96.23%
Greece	75.04%	91.24%

Source: Research Institute for Tourism (2014), Seasonality of Tourism in Greece

3.1.3 The challenges addressed and strategic policies

Despite the growth of tourism, the significant contribution and the relative high attractiveness, the Greek tourism industry has reached a stage where both its potential and competitiveness have become unsustainable. Tourism development in almost all areas took place without any development plan, respect of the landscape and environment and demand analysis (Varvaressos et al., 2013). From the point of view of competitiveness, the Greek tourism is not anymore 'good value for money' (Varvaressos & Sotiriadis, 2008). The leisure tourism market doesn't perceive the country as cheap in relation to comparable destinations in the Mediterranean. Further, much of the country's tourism infrastructure does not meet the needs of a market less sensitive to price and more concerned with quality and value for money, endangering the future of Greek tourism industry. The gradual deterioration of tourism offering, the image of cheap and undifferentiated 4Ss destination, the increase of tourism arrivals but decrease of expenditure per capita, the development of tourism as a single regional development option, the inability of SMTEs to cooperate and collaborate, the deterioration of natural, social and cultural resources, and the negligence with regard to new tourism demand trends are included in the main challenges addressed.

And maybe these challenges have emerged the Deputy Minister of Economy, Development and Tourism, Mrs. Elena Kountoura, to declare recently (01.12.2015) that the lengthening of the touristic season is one of the top priorities of the Ministry as well as one of the fundamentals of tourism policies that will be applied, during her speech in an event regarding the all-year round touristic development of Santorini island (www.tornosnews.gr). Among other, the Minister referred to the national strategy for tourism, which is characterized as dynamic and multi-faceted, and will apply in the 6 following axes:

1. Lengthening of the touristic season,
2. Penetration into new markets,
3. Development of special and alternative forms of tourism,
4. United promotion of tourism in cooperation with regions and private sector,
5. Consolidation of tourism legislation and strengthening of official structures of the Ministry, and
6. Empowering entrepreneurship and investments.

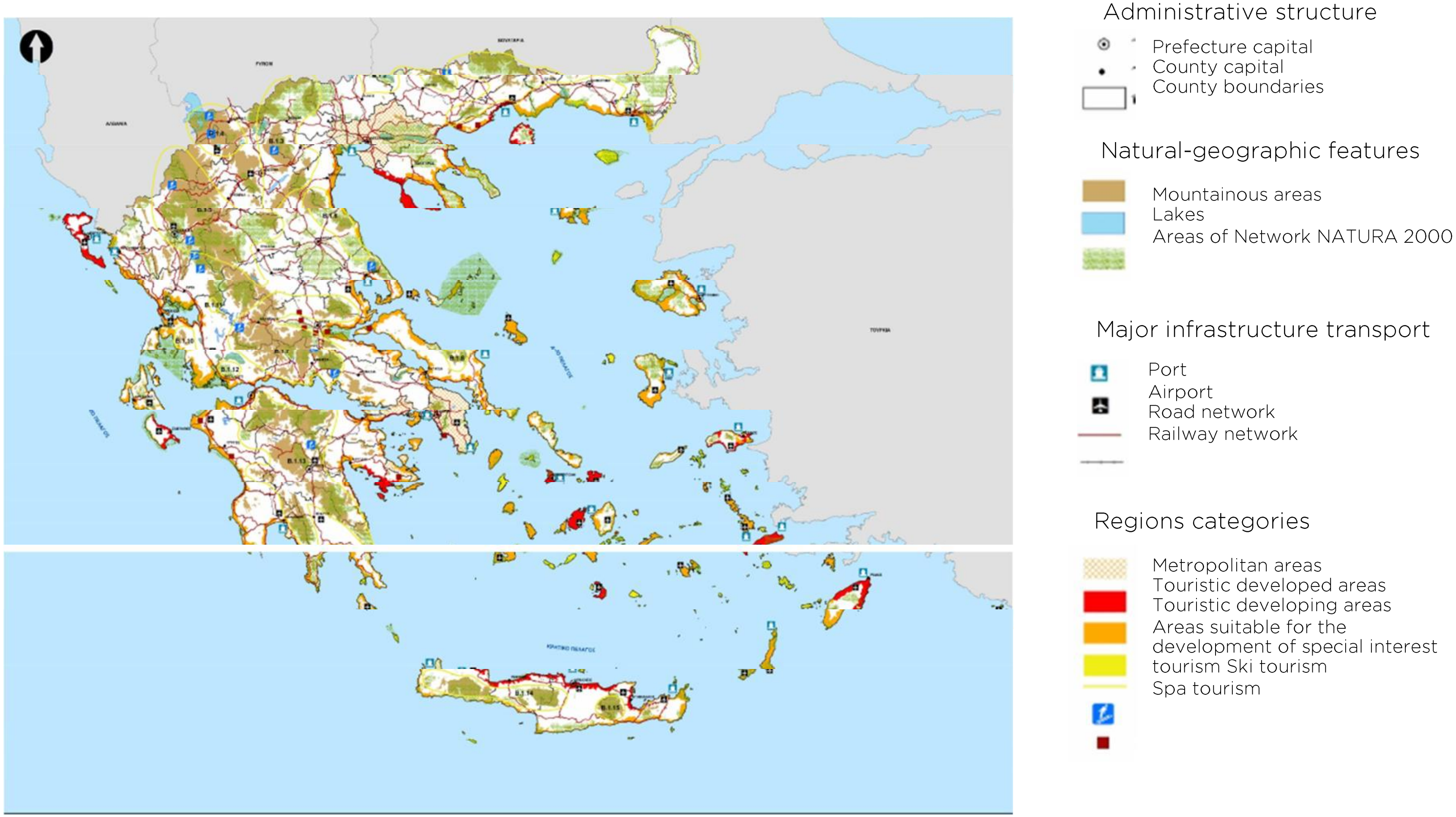
Besides, the set of comparative advantages of Greece (cultural capital, climate, Polynesian nature, length and quality of the coast, natural environment, variety and high turnover form and the type of resources, density and diversity of areas of outstanding natural beauty), make Greece unique in the world tourist map as to development potential of more than modern forms of tourism and even high specifications. Additionally, according to Mrs. Kountoura (01.12.2015), the 12-month tourism is an integrated tourist product, since it ensures ongoing business operation, helps to reduce seasonal unemployment, increases revenue and jobs, attracts quality level tourists, mobilizes new investments, and leads to upgrading of tourist and general infrastructure.

This strategy is in straight line with the new Special Framework for Spatial Planning and Sustainable Development of Tourism and Strategic Environmental Impact Assessments, which was approved on December 2013 (Official Government Gazette No. 3155/B'/12.12.2013) and aims to create conditions for the transition from mass, undifferentiated, monothematic and low economic performance tourism to quality, diversified and multidisciplinary tourism, which is cost-effective, targeted at audiences with higher requirements, not depended on the established tourism model
"sun-sea", and utilizes tourism resources, natural and manmade.

(http://www.ypeka.gr/LinkClick.aspx?fileticket=ZX3O%2FZgi4pU%3D&tabid=513&language=el-GR), including rural tourism (agrotourism, hiking, cultural tourism, wine tourism, culinary tourism).

According to the Plan, the strategic directions for spatial organization and development of rural tourism in Greece includes the development of the sector in rural areas which have touristic interest, including areas of National System of Protected Areas (Figure 10), except few areas like national parks, where specific forms of tourism are accepted (e.g. geotourism); the maintenance and enhancement of traditional production lifestyle elements; and the establishment of local networks and routes of multidisciplinary character. Especially for the promotion of agrotourism and wine tourism, the strategic directions include the development and strengthening of a distinctive and integrated agrotourism product which contains accommodation, food-catering, production and distribution of agricultural products and processed agri-food; the interconnection of local production with agrotourism consumption/demand (e.g. local quality trademarks); the development of gastronomic/culinary tourism through actions that promote Greek cuisine and other individual versions (e.g. Cretan and Messinian cuisine) as a unique touristic resource; and promotion of trade of value-added agricultural and locally processed products.

Figure 10: Map of basic orientations of spatial organization of tourism in Greece (2013)



Source: Ministry of Environment and Energy (2034), Official Government Gazette No. 3155/B'/12.12.2013

At this point, it is worth to note that the private sector as well supports that the future of Greek tourism stands on the development of a diversified and multidisciplinary tourism product, since according to the "Tourism St rategic Planning 2021: The Road Map Implementation" that the Greek Tourism Confeder ation (SETE, 2014) presented, the main priority is to establish a strong and diversified portfolio of tourism products. Specifically, the confederation of Greek tourism enterprises supports that besides the "main tourism products" (sun & beach; nautical tour ism; city break; medical tourism; cultural/religious tourism; and MICE tourism), three "complementary and specialized products" should be developed and promoted, including agrotourism, ecotourism, and culinary tourism. For each of these products, a niche strategy that includes appropriate market strategy, customer segmentation, infrastructure development and promotion strategy should be developed.

3.2 Concept of Agro/Rural Tourism

The European Parliament (2011) underscored that " *rural tourism and agri-tourism should improve the quality of life, bring economic and income-source diversity to rural areas, create jobs in these regions, keep people there – even by preventing depopulation – and establish a direct link with the promotion of traditional, ecological and natural food products*".

Agro/rural tourism is niche market tourism area, part of a global expansion of special interest tourism, usually taken to mean alternative forms of tourism which give emphasis on the contact and understanding of inhabitants' way of living and the local natural environment, in contrast to mass tourism, characterized by large numbers of people seeking relevant to their culture holidays in popular resort destinations (Smith and Eadington, 1992).

Agro/rural tourism exists in many parts of Alpine Europe for over a century, has grown rapidly, and in a unique way across most of Europe (and worldwide). It is unique because it is the first type of tourism that is not – as yet – resort based. It is extremely broad in content, encompassing nature tourism, ecotourism, adventure tourism, food/culinary tourism, and many other emergent developments.

Typical characteristics of agro/rural tourist destinations are:

- small, scattered enterprises, which may benefit from co-operative marketing and assistance;
- numerous small municipalities which may need to work together to create a viable destination;
- a preponderance of family businesses providing a natural welcome but sometimes inconsistent standards;
- the lack of a clear tourism identity for many rural areas;
- considerable scope for tourism to support the traditional rural economy, especially through the provision of accommodation and facilities on farms and through the promotion of local produce and crafts to visitors;
- sensitive environments, sometimes requiring management of visitor pressure;
- fragile communities, susceptible to intrusion; and
- sensitivity to large scale and inappropriate development, but with opportunities to use the local rural vernacular in building projects and conversions.

(European Commission, 1999):

The concept of agro/rural tourism in Greece refers to tourist activities, which are carried out in non-urban regions by individuals mainly employed in the primary or secondary sector of the economy. Such activities involve small tourist units of family or cooperative type, which offer goods and/or services and furnish complementary revenue. Also they stimulate the local and regional economy and make the rural population remain at place. It is useful to mention that the terms agrotourism, farm tourism or agritourism and rural tourism are used interchangeably in Greece (Iakovidou et al., 2001).

In comparison with other European countries, a considerable delay is observed in the development of agro/rural tourism in Greece. The first stage of its development, back to the 60's, was associated with its development in coastal areas, consisting of farmers' effort to offer hospitality and promote local produce. This effort did not bear fruit and was soon abandoned mostly due to the dramatic increase of mass tourism in these areas (Tsartas and Thanopoulou, 1994). The second stage in the development of agro/rural tourism dates back to the 80's, but was intensified in the 90's, since during this period agro/rural tourism became widely known in Greece as the tourism of the three "phi"s ("physi-philia-philoxenia"= nature, f riendship, hospitality) and many of the country's rural areas that had hither to be unknown to the tourist market were put on the alternative tourism map as agro/rural tourism destinations (Iakovidou, 1992) and additionally, the creation of a multitude of units was financially assisted through European funding programs (Anthopoulou et al., 1999)

Agro/rural tourism today is entering a new phase of concentrating on organization of destinations and shaping a specific image and profile vis-à-vis tourists so as to be competitive both against the established coastal tourist destinations and against other agro/rural tourist destinations in neighboring regions. Thus, the model of agro/rural; tourism prevalent in Greece concerns tourist services -lodging, entertainment activities, production and distribution of small-scale, local products by family or co-operative units functioning within the framework of the village. In this form the resulting agro/rural tourism product incorporates the whole "image" of the area as it is recorded in the natural and agricultural landscape, the way of life and the local civilization.

Agro/rural tourism cannot be defines solely by tourism type: intensity of use, location, style of management, integration and acceptance by the community play important part. However, a tentative classification of tourist activities which are usually specifically rural is given below (Table 5).

Table 5: Tourist activities which are usually specifically rural

1. Walking	2. Climbing/Rock climbing
3. Adventure holidays/wilderness holidays	4. Canoeing
5. Rafting	6. Cross country skiing
7. Snow shoe tours	8. Low intensity downhill skiing
9. Nature study in outdoor settings, including bird watching, photography, etc.	10. Ecotourism / safaris
11. Hunting	12. River, lake and canal angling
13. Cycling / cycle touring	14. Mountain biking
15. Horse riding	16. Landscape appreciation
17. Rural heritage studies	18. Small town / village touring
19. Relaxation holidays requiring a rural milieu	20. Small scale conventions/conferences
21. Rural festivals	22. Sports requiring natural settings, e.g. orienteering
23. Farm holidays	24. Farm holidays using farms as a base for rural touring

Source: European Parliament (2013), Industrial Heritage and Agri/Rural Tourism in Europe

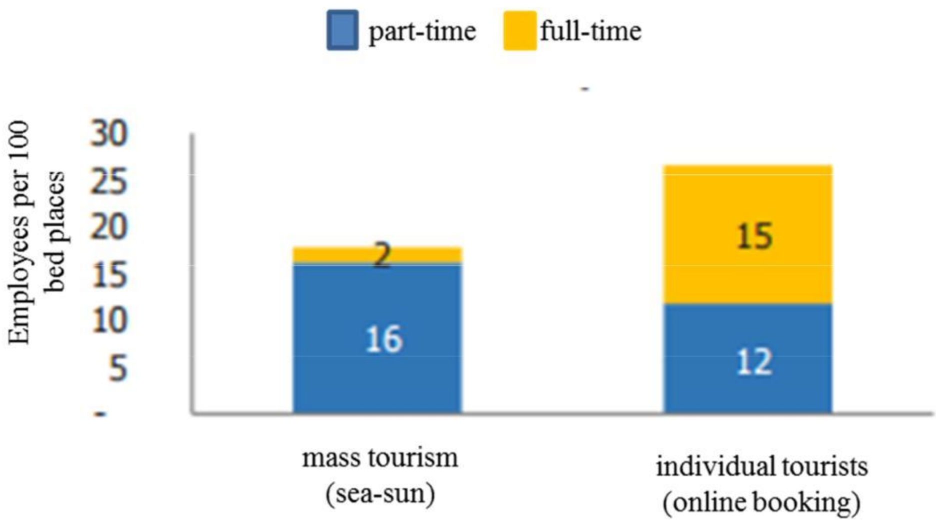
Agro/rural tourism claims to offer benefits to the economy, to heritage protection, to local communities where they operate and to the wider society, however lack of statistical data and integration of many parts of the sector within other sectors, does not permit to fully appreciate how strong the agro/rural tourism sector can be.

Indicatively, the importance of agro/rural tourism in the UK realized in 2001, since the government found that national rural tourism revenues in 2000 were estimated to be around €14bn, compared to €18bn from the agricul tural sector, while rural and farm tourism employed over 380.000 people in 25.000 businesses (Sharpley & Craven, 2001). EuroGites suggested that in 2008, agro/rural tourism supported 900.000 direct and indirect jobs in Europe, and generated €150bn in gross income each year (EuroGites, 2009). Barbieri (European Parliament, 2013) surveyed 873 US farms with a diversified entrepreneurial portfolio, and found agri-tourism farms approach sustainability to a greater extent than their counterparts, producing multiple environmental, socio-cultural and economic benefits for their farms, households and society. Results suggest that agri-tourism, compared with other farm entrepreneurial ventures, is more successful in increasing farm profits, creating jobs and conserving the natural and cultural heritage. For example, 52.4% of agri-tourism farms have been within the same family for at least two generations and 73.3% are willing to pass the farm on to their children, proportions that are significantly higher than other types of entrepreneurial farms.

According to Research Institute's for Tourism study (2013), the variable that explains the largest proportion of the variation of employment in tourism sector in Greece is the number of each hotel room that is the size of the unit. The elasticity of employment during 2012 was estimated at 0.84. This means that an accommodation unit that has 10% more rooms will employ 8.5% more employees than another unit of the same class with similar technical characteristics. This practically means that smaller accommodation units of the same class contribute proportionally to the creation of more jobs. The price elasticity of the room in 2012 regarding employment was estimated at 0.37. This means that, taking out the effects of other factors, a hotel that charges the room by 10% more than another one is employing 3.7% more employees. Therefore the rising of prices means more jobs.

And agro/rural tourism sector can generate job places in the countryside, since according a recent study of National Bank of Greece on SMEs and the accommodation services (hotels), the medium-sized hotels in Greece that rely more on mass tourism, operate under heavy influence of travel agents regarding pricing (56%), thus keeping prices relatively low (meaning less job places as Research Institute's for Tourism study revealed). Specifically, the average price for a double room for mass tourism (sea-sun) was estimated to €7 7 in 2014 while the corresponding value for individual tourists (through online booking), which is usually the main market of agro/rural tourism, was estimated at €140 (National Bank of Greece, 2015). Moreover, the study confirmed, as already mention previously, that hotels which are based more on mass tourism model show higher seasonality (high occupancy during the summer months and almost no occupancy during winter), have less employees in comparison with the hotels that attract tourists through online booking (2 vs. 15 full-time employees per 100 bed places correspondingly) (Figure 11).

Figure 11: Number of employees in Greek hotels according to hotels strategy (2014)



Source: National Bank of Greece (2015), SMEs: research juncture. Special topic: Hotels

Additionally, individual tourists and alternative/special interest tourism seems to led to higher operating profit margin (26.4% vs. 18.5% of hotels limited to sea-sun tourism packages) while hotels with frequent transactions with travel agencies confront more late payments (around 2 months, in contrast with hotels that attract individual tourists through online booking and the time needed was estimated to 1 month) (National Bank of Greece, 2015).

Field research revealed that most agro/rural tourism enterprises in Greece are small/family companies, owner-operated businesses led by entrepreneurs with a drive to share their favorite places and passions with others. Almost all of the agro/rural tourism enterprises that participated in field research declared that they occupy no more than 10 employees annually, mostly not full-time, besides the family members that support (average number of full-time employees is 4-5 while according to the activities offered by enterprise per season, the number of part-time employees can reach up to 10-15), implying that agro/rural tourism is a labor intensive sector.

17 out of 21 agro/rural tourism enterprises that were interviewed had annually turnover less than €200.000 in 2014, regardless the type of enterprise (e.g. accommodation or catering services) or the place of establishment (e.g. mountainous region close to cities or island region, with high level tourism development).

However, field research results showed that agro/rural tourism enterprises that either started to operate in 80's and early 90's, without taking advantage of European and national funding or managed to enrich the tourism product they offer with different and seasonal leisure activities (e.g. accommodation and nature leisure activities like birdwatching or catering services with leisure and educational farm activities), had annual turnover over €200.000 in 2014. Moreover, ag ro/rural tourism activities, even if they don't constitute the main object of an enterprise, they seem to support the total company's revenues, as for example in the case of wineries/estates which organize events like distillation event, wine tasting events in the winery or welcome guests during specific dates (e.g. on European Day of Wine Tourism), the revenues gained through sales during these events constitute even 25-30% of total company's revenues, including revenues due to exports.

3.3 Supply of Agro/Rural Tourism Services

Agri-tourism is a well-established reality in Italy, the only member country of the European Union that has specific provisions which regulate agri-tourism; in 2013, there were 20.897 Agritouristic farms authorized by type (accommodation, catering, tasting, and other activities), 423 more than the previous year (+2.1%) and 7.878 more than 10 years before in 2003 (+60.5%) (Italian National Institute of Statistics, n.d.). In Poland it is estimated that 10.000 farms out of 2 million totally receive guests.

Based on EuroGites data regarding rural tourism enterprises in Europe (Ehrlich, 2014), it is estimated that rural tourism stands for 15% of bed capacity in Europe. The total offer in 2014 was estimated above 500.000 rural accommodation units, including 5-6.5 million beds, with 20% of these units concern agrotourism (working farms), while less than 20% offered bed and breakfast (B&B) services, since 80% preferred self-catering services. According to European Parliament (2013), in 2009 there were 400.000 rural accommodation units in Europe, with 3.6 million bed spaces (twice the total bed capacity of Spain, the second most important tourism destination country in Europe), showing a growth rate of 25% regarding the number of rural accommodation units and almost 40% regarding the number of beds.

Accommodation is a central theme of all agro/rural tourism since it has more enterprises than any other part of agro/rural tourism and is so different to resort accommodation, as it attracts a special type of agro/rural tourism business – the *life style entrepreneur*.

According to available statistics by Eurostat (2015), in European Union of 28 countries, 16.659.108 bed-places were established in non-coastal areas (coastal areas include municipalities LAU-2 bordering the sea or having half of their territory within 10km from the coastline) in 2014, representing 53.83% of the total number of bed-places in EU-28 (Table 6). This figure showed a slight decrease comparing to 2013 (54.00% when the number of bed-places counted for 16.557.440) but a slight increase comparing to 2012 (53.66% when the number of bed-places counted for 15.978.896). The highest percentage of bed-places in non-coastal areas in EU-28 during 2014 is presented in Czech Republic (100%), Luxembourg (100%), Hungary (100%), Austria (100%), Slovakia (100%), Former Yugoslav Republic of Macedonia (100%), and Serbia (100%) while the lowest percentage, besides the islands, existed in Croatia (5.39%), in Greece (6.82%) and in Denmark (7.65%).

In Greece during 2014, 84.468 bed-places in Greece (6.82% out of total number of bed-places in Greece) were established in non-coastal areas, representing only 0.51% of the total number of bed-places in EU-28. However, by taking into consideration the corresponding size in 2013 (6.65% or 80.285 bed-places) and in 2012 (6.61% or 79.684 bed places), it is revealed that a very slow but stable growth exists in Greece regarding the sector of accommodation services in non-coastal areas (Table 6).

Table 6: Number of bed-places by non-coastal and coastal area (2012, 2013, 2014)
(: not available)

Time	2012			2013			2014		
Geo	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal
European Union - 28	29.780.650	15.978.896	13.847.285	30.659.381	16.557.440	14.095.352	30.947.307	16.659.108	14.287.921
European Union - 27	28.981.722	15.954.301	13.096.016	29.792.271	16.509.602	13.276.080	30.053.480	16.610.900	13.442.302
Belgium	371.731	301.766	69.965	372.867	303.827	69.040	366.166	298.680	67.486
Bulgaria	301.140	98.055	203.085	302.433	100.141	202.292	314.257	104.274	209.983
Czech Republic	748.337	748.337	0	740.671	740.671	0	710.381	710.381	0
Denmark	440.410	32.342	408.067	417.594	31.920	385.674	420.031	32.112	387.919
Germany	3.326.576	2.742.664	578.987	3.326.821	2.742.527	577.709	3.318.592	2.746.990	571.328
Estonia	52.979	18.450	34.529	55.482	19.599	35.883	58.095	21.098	36.997
Ireland	219.874	:	:	211.0334	79.143	131.891	205.860	75.799	130.061
Greece	1.204.845	79.684	1.125.158	1.207.394	80.285	1.127.108	1.238.586	84.468	1.154.117
Spain	3.414.798	1.015.001	2.399.797	3.437.362	1.027.688	2.409.674	3.482.983	1.060.469	2.422.514
France	5.013.188	3.020.559	1.992.629	5.049.726	3.020.755	2.028.971	5.109.884	3.070.118	2.039.766
Croatia	798.928	40.901	758.027	867.110	47.838	819.272	893.827	48.208	845.619
Italy	4.762.601	2.090.548	2.672.053	4.728.180	2.090.613	2.637.567	4.849.432	2.120.404	2.729.028
Cyprus	86.645	0	86.646	87.143	0	87.143	87.578	0	87.578
Latvia	36.901	12.098	24.803	38.400	12.677	25.723	39.074	13.312	25.762
Lithuania	67.250	48.787	18.463	69.287	50.106	19.181	72.926	52.604	20.322
Luxembourg	68.159	68.159	0	66.747	66.747	0	64.858	64.858	0
Hungary	382.819	382.819	0	422.039	422.039	0	435.620	435.620	0
Malta	40.463	0	40.463	43.360	0	43.360	41.873	0	41.873
Netherlands	1.213.412	828.744	384.668	1.404.852	984.702	420.150	1.373.588	955.378	418.210
Austria	979.329	979.329	0	981.070	981.070	0	993.554	993.554	0
Poland	675.433	499.359	176.074	679.445	502.008	177.437	694.023	512.868	181.155
Portugal	486.512	118.956	367.556	491.099	101.894	389.205	519.871	110.749	409.122
Romania	285.488	204.505	80.983	303.236	215.877	87.359	308.997	219.852	89.145
Slovenia	105.500	85.085	20.415	105.559	85.326	20.233	106.557	86.398	20.159
Slovakia	193.369	193.369	0	190.306	190.306	0	183.404	183.404	0
Finland	246.676	173.581	73.095	254.112	179.286	74.826	250.984	177.323	73.661
Sweden	792.864	369.101	423.763	805.033	371.696	433.337	805.287	371.488	433.799
United Kingdom	3.464.423	1.681.870	1.782.553	4.001.019	2.108.699	1.892.317	:	:	:
Iceland	:	:	:	:	:	:	:	:	:
Liechtenstein	:	:	:	:	:	:	2.011	2.011	0
Norway	516.243	191.846	324.397	573.070	206.269	366.801	575.295	213.848	361.447
Switzerland	:	:	:	:	:	:	:	:	:
Montenegro	149.348	6.688	142.660	:	:	:	:	:	:
Former Yugoslav Republic of Macedonia	42.119	:	:	42.542	:	:	43.432	43.432	0
Serbia	107.962	107.962	:	101.729	101.729	:	102.420	102.420	0

Source: Eurostat, 2015 (http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tin00183)

Table 7: Number of accommodation establishments (hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks) by NUTS2 (NUTS2010) regions in Greece (2012-2014)
(*: not available*)

Time ➡	2012			2013			2014		
Geo ⬇	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal
European Union - 28	552.960	293.072	256.703	562.279	298.048	264.124	570.268	299.790	270.472
European Union - 27	495.152	291.044	200.908	500.253	295.459	204.687	502.544	296.894	205.644
Greece	33.540	2.606	30.932	33.657	2.621	31.034	34.522	2.728	31.795
Northern Greece	8.378	1.278	7.099	8.376	1.267	7.108	8.504	1.307	7.197
Eastern Macedonia and Thrace	*1.122*	*93*	*1.028*	*1.121*	*92*	*1.028*	*1.141*	*97*	*1.044*
Central Macedonia	*4.762*	*357*	*4.405*	*4.764*	*356*	*4.408*	*4.843*	*373*	*4.470*
Western Macedonia	*241*	*241*	*0*	*238*	*238*	*0*	*248*	*248*	*0*
Thessaly	*2.253*	*587*	*1.666*	*2.253*	*581*	*1.672*	*2.272*	*589*	*1.683*
Central Greece	9.322	1.234	8.087	9.382	1.261	8.120	9.575	1.321	8.254
Epirus	*1.599*	*581*	*1.018*	*1.611*	*591*	*1.020*	*1.678*	*617*	*1.061*
Ionian Islands	*3.773*	*0*	*3.773*	*3.780*	*0*	*3.780*	*3.779*	*0*	*3.779*
Western Greece	*501*	*148*	*353*	*506*	*149*	*357*	*534*	*156*	*378*
Continental Greece	*1.754*	*295*	*1.459*	*1.760*	*298*	*1.462*	*1.803*	*308*	*1.495*
Peloponnese	*1.695*	*210*	*1.484*	*1.725*	*223*	*1.501*	*1.781*	*240*	*1.541*
Attica	1.316	66	1.250	1.310	65	1.245	1.369	71	1.298
Aegean Islands, Crete	14.524	28	14.496	14.589	28	14.561	15.075	29	15.046
North Aegean	*1.368*	*0*	*1.368*	*1.368*	*0*	*1.368*	*1.375*	*0*	*1.375*
South Aegean	*8.955*	*0*	*8.955*	*8.993*	*0*	*8.993*	*9.046*	*0*	*9.046*
Crete	*4.201*	*28*	*4.173*	*4.228*	*28*	*4.200*	*4.654*	*29*	*4.625*

Source: Eurostat, 2015

Table 8: Number of bed-places (hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks) by NUTS2 (NUTS2010) regions in Greece (2012-2014)
(*: not available*)

Time	2012			2013			2014		
Geo	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal
European Union - 28	29.780.650	15.978.896	13.847.285	30.659.381	16.557.440	14.095.352	30.947.307	16.659.108	14.287.921
European Union - 27	28.981.722	15.954.301	13.096.016	29.792.271	16.509.602	13.276.080	30.053.480	16.610.900	13.442.302
Greece	1.204.845	79.684	1.125.168	1.207.394	82.285	1.127.108	1.238.586	84.468	1.154.117
Northern Greece	267.026	40.801	226.224	265.096	40.570	224.527	272.923	42.334	230.589
EasternMacedonia and Thrace	*38.413*	*5.107*	*33.306*	*38.186*	*5.041*	*33.145*	*38.710*	*5.193*	*33.517*
Central Macedonia	*167.419*	*11.970*	*155.449*	*165.933*	*11.949*	*153.985*	*170.856*	*12.582*	*158.274*
Western Macedonia	*7.623*	*7.623*	*0*	*7.650*	*7.650*	*0*	*8.009*	*8.009*	*0*
Thessaly	*53.571*	*16.101*	*37.469*	*53.327*	*15.930*	*37.397*	*55.348*	*16.550*	*38.798*
Central Greece	317.424	33.691	283.731	319.354	34.608	284.744	328.453	36.794	291.658
Epirus	*34.422*	*13.152*	*21.269*	*34.297*	*13.493*	*20.803*	*35.833*	*14.115*	*21.718*
Ionian Islands	*137.893*	*0*	*137.894*	*138.856*	*0*	*138.857*	*139.752*	*0*	*139.752*
Western Greece	*27.123*	*5.998*	*21.124*	*27.438*	*6.036*	*21.401*	*29.567*	*6.853*	*22.714*
Continental Greece	*52.872*	*7.446*	*45.425*	*52.837*	*7.557*	*45.279*	*54.662*	*7.791*	*46.871*
Peloponnese	*65.114*	*7.095*	*58.019*	*65.926*	*7.522*	*58.404*	*68.639*	*8.035*	*60.603*
Attica	73.949	4.375	69.574	73.400	4.290	69.110	76.493	4.512	71.981
Aegean Islands, Crete	546.446	817	545.629	549.544	817	548.727	560.717	828	559.889
North Aegean	*35.536*	*0*	*35.536*	*35.561*	*0*	*35.561*	*36.005*	*0*	*36.005*
South Aegean	*302.067*	*0*	*302.067*	*304.247*	*0*	*304.247*	*309.495*	*0*	*309.495*
Crete	*208.843*	*817*	*208.026*	*209.736*	*817*	*208.919*	*215.217*	*828*	*214.389*

Source: Eurostat, 2015

As it is presented in Table 7 above, in Greece during 2014, the highest percentage of accommodation establishments (hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks) were in prefectures of Western Macedonia (100%), Epirus (36.77%), and Western Greece (29.21%), while the lowest percentage in prefectures of Attica (5.19%), Central Macedonia (7.7%), and Eastern Macedonia and Thrace (8.5%), besides Greek islands.

Regarding the regional considerations of bed-places in non-coastal areas of Greece in 2014, the highest percentage existed in prefecture of Thessaly (19.59%), even though the corresponding percentage of accommodation establishments in correlation with the total number of bed-places in Greek non-coastal areas was not the highest (25.92%), indicating that tourism in that area presents features of "mass-tourism" (big-scale accommodation establishments). Other prefectures with high percentage of bed-places in non-coastal areas are Epirus (16.71%) and Central Macedonia (14.90%) (Table 8).

Field research regarding the supply of agro/rural tourism enterprises revealed that despite the ongoing economic crisis in Greece, all entrepreneurs include in their future operation plans the expansion of their enterprise, either their facilities or their services. Indicatively:

- an enterprise with catering and leisure activities, even though close to the city of Thessaloniki, plans to create a hostel, in order to "defeat" weekend seasonality;
- an enterprise that offers horse-riding activities plans to enrich its product with activities related to apiculture;
- a hostel in Crete island plans to increase the number of bed spaces and create a room for gastronomy events;
- a hostel in Lake Plastira plans to build a swimming pool, in order to "address" summer seasonality; and
- a farm in mountainous Florina plans to offer tasting activities…

3.4 Demand for Agro/Rural Tourism & Trends of Agro/Rural Tourists

The changing scenario of the tourism sector has encouraged the demand for agro/rural tourism at national and international level. Driven by the need to escape from the hustle and bustle of city life, tourists express a high appreciation for the quietness of countryside and small villages, as well as for a more direct contact with the natural environment and the rediscovery of folklore and ancient traditions (Debailleul, 2001).

The agro/rural tourism market has another additional feature. Exercise, largely walking, but increasingly leisure cycling, and to some extent more extreme activity sports such as climbing, orienteering and similar pastimes, have become very popular. Britain, Germany, Austria, Switzerland and France for example, have dense networks of footpaths and other routes, typically well mapped and signed, with relatively clear legal rights of access (European Parliament, 2013).

The growth of agro/rural tourism market also reflects increased levels of public education and the interest and endorsement of activity by the mass media. Agro/rural tourism has also benefited from changes in the school curricula in many countries which now require knowledge of the recent past, of geography and environmental issues, and for many, some knowledge of the countryside.

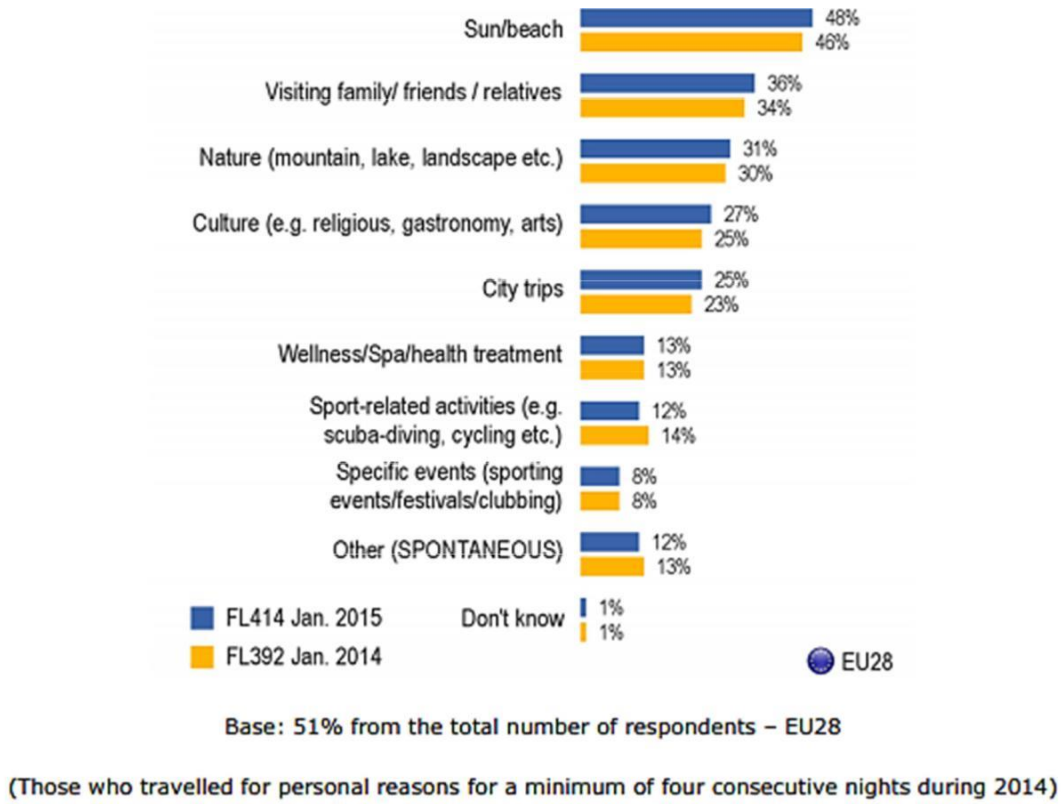
The potential demand for agro/rural tourism can be seen in the impacts of visitor numbers and tourism spending in Europe's protected areas. For example, UK statistics showed that the percentage of tourism related business and employment in National Parks was double that of rural England as a whole (27.5% of businesses and 21.2% of rural employment are tourism related). Similar figures have been reported for other parts of Europe (Getzner et al, 2010) while Mayer et al. (2010), comparing visitor expenditure across six German National Parks, found that national average overnight visitor expenditure in German as a whole was €120 per person.

The agritourism in Italy confirms those trends. During the decade 2000-2010, the number of foreigner visitors in Italy had increased by 200%. Indeed, more than one third of tourists hosted by Italian farmhouses were of foreign nationality and their number had considerably grown. The 300.000 visitors registered in 2000 are small considering that the foreign customers of Italian agritourism have been more than 800.000 in 2010. The sector attracts visitors from all over the world, although the main partners (Germany, United Kingdom, USA, Netherlands, France, and

Switzerland) account for 80% of total international demand of agritourism in Italy. German tourists are the most numerous: they accounts for 50% percent of the total international demand.

According to European Commission's report (2015) on preferences of Europeans towards tourism in 2014, besides sun or beach which was the most popular reason for going on holiday, almost a third (31%) of respondents who travelled at least once for a minimum of 4 nights during 2014, mention nature (landscapes, mountains, etc.) as one of their main reasons, up from 30% who gave this answer in January 2014 for travels in 2013. More than a quarter of respondents (27%) mention culture as one of their main reasons for taking a holiday, up from 25% in 2013, while around one person in eight (13%) went for wellness or spa or health treatment, and a similar proportion (12%) went for a sport-related activity (Figure 12).

Figure 12: Main reasons for Europeans going on holiday in 2014 & 2013



Source: European Commission (2015), Preference of Europeans Towards Tourism

As illustrated in the Figure 13 below, in 4 European countries – Belgium (55%), the Czech Republic (52%), Lithuania (48%) and the Netherlands (43%) – enjoying nature was the main reason for taking a holiday during 2014, a touristic resource that is consistent with agro/rural tourism, encompassing nature tourism and ecotourism. Culture (e.g. religion, gastronomy, the arts, etc.), a touristic resource that relies with agro/rural tourism, incorporating food/culinary tourism and wine tourism leisure services, was the main reason for going on holiday on 2014 in Malta (34%), and it was also mentioned by a relatively large proportion of respondents in Belgium (42%), Austria (38%), Estonia (37%), Luxembourg (36%) and the Netherlands (35%). Sport-related activities (adventure tourism) seems to be a less common reason, compared with other reasons, since for that reason relatively high proportions of people only in Czech Republic (29%) and Austria (25%) went on holiday, which stands as well for wellness or spa, since only in the Former Yugoslav Republic of Macedonia (45%) and in Iceland (35%) went on holiday during 2014 for that main reason (European Commission, 2015).

Figure 13: Main reasons for Europeans going on holiday during 2014 (firstly and then) (per European country)

	Sun/beach	Visiting family/ friends/ relatives	Nature (mountain, lake, landscape etc.)	Culture (e.g. religious, gastronomy, arts)	City trips	Wellness/ Spa/health treatment	Sport-related activities (e.g. scuba-diving, cycling etc.)	Specific events (sporting events/ festivals/ clubbing)
EU28	48%	36%	31%	27%	25%	13%	12%	8%
BE	50%	38%	55%	42%	35%	12%	21%	7%
BG	53%	28%	33%	14%	10%	15%	4%	8%
CZ	47%	24%	52%	26%	18%	15%	29%	10%
DK	44%	31%	33%	34%	25%	6%	9%	9%
DE	45%	32%	33%	26%	24%	19%	17%	4%
EE	49%	48%	37%	37%	18%	5%	11%	9%
IE	50%	39%	14%	23%	16%	7%	11%	14%
EL	54%	48%	23%	12%	18%	11%	6%	8%
ES	47%	37%	18%	30%	25%	5%	4%	6%
FR	48%	48%	37%	28%	23%	16%	12%	7%
HR	61%	43%	29%	27%	39%	8%	11%	8%
IT	46%	30%	21%	29%	31%	13%	3%	5%
CY	43%	39%	19%	17%	26%	4%	2%	19%
LV	32%	49%	38%	29%	41%	22%	11%	16%
LT	40%	37%	48%	17%	36%	10%	6%	2%
LU	58%	45%	40%	36%	32%	24%	19%	7%
HU	51%	38%	39%	22%	38%	22%	8%	6%
MT	10%	20%	27%	34%	17%	17%	10%	13%
NL	42%	30%	43%	35%	24%	5%	16%	6%
AT	49%	29%	37%	38%	33%	20%	25%	9%
PL	41%	40%	40%	15%	38%	11%	19%	7%
PT	57%	39%	21%	22%	9%	23%	3%	11%
RO	42%	37%	29%	16%	17%	12%	5%	7%
SI	73%	10%	37%	13%	23%	12%	15%	10%
SK	49%	23%	28%	25%	21%	26%	16%	10%
FI	31%	41%	28%	29%	30%	16%	22%	13%
SE	45%	39%	25%	27%	22%	27%	18%	10%
UK	55%	37%	24%	27%	20%	7%	10%	13%
MK	70%	35%	47%	21%	14%	45%	7%	4%
IS	26%	39%	19%	18%	24%	35%	11%	12%
ME	37%	46%	36%	24%	27%	14%	10%	6%
TR	42%	43%	24%	17%	19%	10%	5%	12%
MD	58%	42%	17%	14%	41%	13%	3%	10%

Highest percentage per country *Lowest percentage per country*

Highest percentage per item | Lowest percentage per item

Base: 51% from the total number of respondents – all surveyed countries

(Those who travelled for personal reasons for a minimum of four consecutive nights during 2014)

Source: European Commission (2015), Preference of Europeans Towards Tourism

However, not all the Europeans tourists are "suppor ters" of agro/rural tourism and the special interest tourism types that this sector encompasses, since in Ireland and in Moldova only 14% and 17% of respondents respectively mentioned nature as the main reason for going on holidays during 2014, while regarding culture, low proportions were seen in Greece (12%), Slovenia (13%), Bulgaria (14%), and Moldova (14%) (European Commission, 2015).

A review of the socio-demographic data (Figure 14) shows that older people are more likely to mention nature as their main reason (35% of those aged 55 or over, falling to 21% of 15-24 year-olds) as well as culture (30% of those aged 55 or over, falling slightly to 26% of 15-24 and 40-54 year-olds). Younger (15-24 year-olds) and middle-aged (40-54 year-olds) respondents are more likely to go on holiday for sport-related activities. Additionally, respondents who completed their education at the age of 20 or over are the most likely to mention nature (36% vs. 21% of those who left school at 15 or under) and culture (31% vs. 18%). Conversely, respondents who still studying (15%) are the most likely to mention sport-related activities (European Commission, 2015).

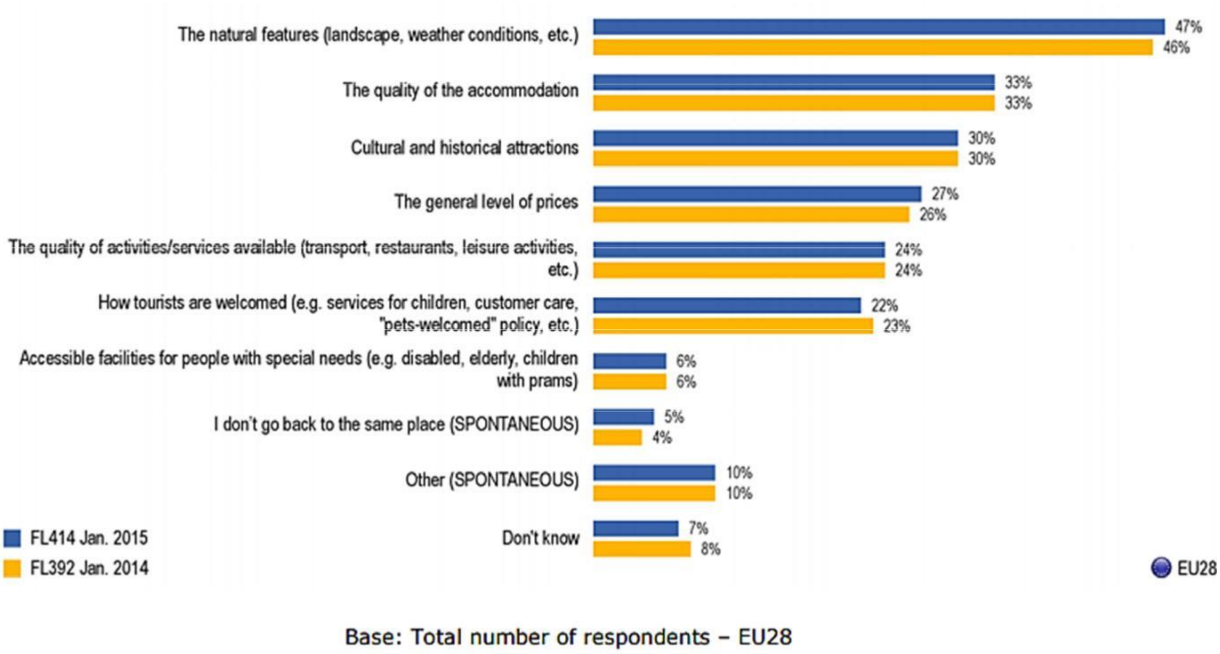
Figure 14: Socio-demographic of Europeans according to the main reasons for going on holidays in 2014

	Sun/beach	Visiting family/ friends/ relatives	Nature (mountain, lake, landscape etc.)	Culture (e.g. religious, gastronomy, arts)	City trips	Wellness/Spa /health treatment	Sport-related activities (e.g. scuba-diving, cycling etc.)	Specific events (sporting events/ festivals/ clubbing)	Other (DO NOT READ OUT)	Don't know
EU28	48%	36%	31%	27%	25%	13%	12%	8%	12%	1%
Sex										
Male	47%	33%	30%	26%	25%	13%	14%	9%	13%	1%
Female	49%	39%	31%	28%	25%	13%	11%	6%	11%	1%
Age										
15-24	54%	46%	21%	26%	27%	9%	14%	15%	6%	1%
25-39	53%	39%	30%	24%	25%	11%	12%	9%	13%	0%
40-54	51%	32%	32%	26%	25%	15%	14%	6%	13%	1%
55 +	38%	33%	35%	30%	24%	15%	10%	4%	14%	1%
Education (End of)										
15-	46%	31%	21%	18%	18%	11%	7%	6%	18%	2%
16-19	51%	33%	29%	22%	23%	16%	10%	6%	14%	0%
20+	45%	37%	36%	31%	27%	12%	14%	7%	11%	0%
Still studying	52%	47%	22%	28%	27%	8%	15%	16%	8%	1%

Source: European Commission (2015), Preference of Europeans Towards Tourism

The natural features of a destination (mountain, lake, landscape, weather, etc.), meaning one of the basic dimensions of agro/rural tourism, seemed to be the main reason for Europeans tourists wanting to return to the same place for holidays during 2014 and 2013, as it showed in Figure 15. When participants were asked to give the main reason for wanting to return to the same destination, and then up to three other from a list of seven likely factors, 47% of the respondents in 2014 (and 46% in 2013) named the natural features would persuade them to go back again, followed by quality of accommodation (33% in 2014 and 2013) and cultural and historical attractions (30% in 2014 and 2013), leaving in a lower position the factor "general level of prices" (27% in 2014 and 26% in 2013), even though these researches took place during a period of financial and economic crisis in Europe.

Figure 15: Main reasons for Europeans to go back to the same place for a holiday during 2015 & 2014 (firstly and then)



Source: European Commission (2015), Preference of Europeans Towards Tourism

Almost in all European countries, except four, natural features are the most important reason to return to the same place for another holiday, which is particularly true for residents in Belgium (61%), France (60%), Luxembourg (59%) and the Netherlands (58%), as it showed in Figure 16 below (European Commission, 2015).

Figure 16: Main reasons for Europeans to go back to the same place for a holiday during 2015 (firstly and then) (per European country)

	The natural features (landscape, weather conditions, etc.)	The quality of the accommo-dation	Cultural and historical attractions	The general level of prices	The quality of activities/ services available (transport, restaurants, leisure activities, etc.)	How tourists are welcomed (e.g. services for children, customer care, "pets-welcomed" policy, etc.)	Accessible facilities for people with special needs (e.g. disabled, elderly, children with prams)
EU28	47%	33%	30%	27%	24%	22%	6%
BE	61%	48%	37%	37%	31%	33%	11%
BG	47%	30%	28%	25%	22%	23%	4%
CZ	60%	34%	38%	16%	29%	22%	8%
DK	44%	28%	38%	27%	23%	22%	6%
DE	49%	36%	28%	23%	19%	19%	4%
EE	45%	21%	33%	26%	18%	9%	4%
IE	43%	35%	32%	35%	41%	25%	7%
EL	40%	34%	30%	32%	25%	14%	6%
ES	36%	32%	30%	27%	26%	18%	6%
FR	60%	30%	31%	30%	21%	26%	7%
HR	44%	27%	35%	28%	26%	21%	6%
IT	44%	19%	29%	21%	18%	27%	3%
CY	34%	31%	38%	32%	15%	10%	2%
LV	53%	20%	38%	27%	24%	28%	4%
LT	42%	25%	31%	31%	17%	16%	7%
LU	59%	41%	36%	25%	33%	30%	8%
HU	46%	35%	37%	27%	26%	23%	3%
MT	37%	20%	38%	18%	14%	22%	5%
NL	58%	38%	36%	20%	19%	14%	5%
AT	55%	46%	35%	28%	31%	30%	7%
PL	49%	29%	25%	32%	20%	23%	9%
PT	39%	28%	23%	28%	16%	18%	3%
RO	41%	28%	25%	25%	23%	18%	5%
SI	47%	35%	23%	26%	18%	14%	4%
SK	47%	35%	31%	18%	26%	13%	6%
FI	40%	25%	39%	37%	38%	20%	4%
SE	41%	25%	34%	19%	25%	20%	4%
UK	42%	46%	33%	32%	37%	26%	11%
MK	41%	43%	18%	40%	9%	28%	1%
IS	42%	17%	31%	24%	27%	22%	2%
ME	45%	27%	34%	26%	17%	25%	4%
TR	42%	33%	27%	33%	18%	13%	9%
MD	37%	25%	31%	24%	16%	15%	5%

Highest percentage per country *Lowest percentage per country*

Highest percentage per item | Lowest percentage per item

Base: Total number of respondents – all surveyed countries

Source: European Commission (2015), Preference of Europeans Towards Tourism

This fact was also revealed through field research and precisely through the interview with a Finnish tourism office with promotes agro/rural tourism activities in Crete Island. The owner of the office mentioned that Finnish tourists prefer to travel to Greece during February due to weather conditions in Greece, stay up to 10 days, and prefer to participate in culinary leisure activities (e.g. taste Cretan cuisine and learn Cretan culture) as well as in leisure activities in nature (e.g. cycling, hiking). She referred to couples without kids or couples with older kids, ranging from 40-45 to 70-80 years old, and persons of upper social class (e.g. administrators, professors, entrepreneurs).

Socio-demographic variations are verified by desk research, since Europeans residents aged 40-54 years old are the most likely to be persuaded to return to the same place for a holiday due to natural features of the place (48%), and the same stands for those with a higher level of education (52%) (Figure 17).

Figure 17: Socio-demographic of Europeans according to the main reasons for going back to the same place for a holiday during 2015

	The natural features (landscape, weather conditions, etc.)	The quality of the accommo-dation	Cultural and historical attractions	The general level of prices	The quality of activities/ services available (transport, restaurants, leisure activities, etc.)	How tourists are welcomed (e.g. services for children, customer care, "pets-welcomed" policy, etc.)	Accessible facilities for people with special needs (e.g. disabled, elderly, children with prams)	I don't go back to the same place (DO NOT READ OUT)	Other (DO NOT READ OUT)
EU28	47%	33%	30%	27%	24%	22%	6%	5%	10%
Age									
15-24	51%	34%	36%	31%	32%	21%	3%	2%	6%
25-39	48%	34%	31%	32%	28%	28%	7%	3%	8%
40-54	48%	36%	30%	29%	24%	24%	7%	5%	8%
55 +	44%	29%	28%	20%	18%	19%	6%	7%	14%
Education (End of)									
15-	35%	26%	19%	21%	16%	20%	7%	8%	14%
16-19	45%	34%	27%	27%	24%	24%	7%	5%	9%
20+	52%	34%	36%	27%	25%	23%	6%	5%	9%
Still studying	53%	34%	36%	32%	32%	20%	3%	2%	7%
Respondent occupation scale									
Self-employed	47%	35%	31%	27%	26%	24%	5%	5%	10%
Employee	51%	38%	34%	30%	28%	25%	6%	5%	7%
Manual workers	48%	28%	26%	30%	21%	25%	5%	3%	10%
Not working	44%	29%	29%	24%	21%	20%	7%	6%	11%

Source: European Commission (2015), Preference of Europeans Towards Tourism

Regarding agro/rural tourism demand in Greece, according to the results of research conducted by the Guest Inn (The Greek Network of Rural Accommodation) (Tsapaki, 2011), visitors to agro/rural tourism lodgings are individual travelers who do not turn to travel agencies and even less to tour operators, but organize themselves a trip. In particular, these visitors use Internet, specialized tourist guides, maps and thematic networks regarding accommodation facilities. Usually they pick regular or low cost flights but not charters, while they prefer to book early enough their vacations.

Agro/rural tourists visit Greece from April to October, while they usually visit at least two different locations/destinations during their stay in Greece and they are constantly on move. The age of travelers ranges from 30 to70 years old (with the highest percentage appearing between 35 and 55 years old).

The profile of Greek agro/rural tourism demand is broadly the same as that recorded in other European destinations. It is characteristic that the specific market is growing rapidly every year. This fact is confirmed by the results of the latest Guest Inn research during 2010, based on which thematic/special interest tourism gains ground in Greece. Specifically, in contrast to the negative results of 2010 regarding the tourism sector generally in Greece, the agro/rural tourism sector recorded a significant increase compared to 2009 (+13.5%) and 2008 (+11%).

France has become the main market of Greek agro/rural tourism (75.41% of international demand), a percentage which has remained stable over recent years (74.65% in 2009, 74.36% in 2008, 73.75% in 2007 and 76.19% in 2005 respectively). Also, an increase was observed in other nationalities, such as Americans, Netherlanders, Italian, Germans, and English. For the Greek market due to the fact that reservations are mainly made by telephone or through Internet, there are no corresponding statistics concerning accommodation preferences.

Regarding regional considerations and spatial distribution of demand, mainland Greece remains the 1st choice with 51.29% of the reservation during 2010, although there was a reduction compared to 2009 and 2008 (58.70% and 55.48% respectively). In the 2nd place Crete Island is found, showing upward trends, reaching 32.11% out of total reservations (23.19% in 2009, 22.84% in 2008 and 12.50% in 2007). All the other islands are continuing to show decline in their reservations (16.59% in 2010, 18.12% in 2009 and 21.68% in 2008).

According to Research Institute's for Tourism study (2013) on performance of Greek Tourism for the period 2011-2012, a significant proportion of visitors from the U.S.A. (3.4%) came for vacation in Greece in March, while Americans also had an increased percentage of total visits during the month of November (7.4%). Additionally, a significant volume of visitors from France (7% of the total French visitors) came to Greece for holidays from April.
Taking into consideration the most recent estimated data by Eurostat (2015), in Greece during 2014, 4.372.405 night spends took place in non-coastal areas which stands for 4.60% of the total number of night spends in Greece during 2014 (95.116.396 night spends) (Table 9). This volume shows an increase by 7.57% comparing to 2013, when the number of night spends in non-coastal areas was 4.064.836 (4.56% of the total number of night spends in Greece) while comparing to 2012, the increase is calculated in 10.22%, when the number of night spends in non-coastal areas was 3.966.934 (4.92% of the total number of night spends in Greece).

Regarding the nationality of tourists spending time at tourist accommodation by non-coastal areas, the available data show a steady increase of inbound tourists (non-residents), since in 2012 they accounted for 18.83% of the total number of tourists in these areas while in 2013 the corresponding figure stood at 22.32% (increase by 3.49%) and in 2014 at 25.99% (increase by 3.67% in relation to 2013 and by 7.16% in relation to 2012) (Table 10).

Table 9: Nights spent at tourist accommodation establishments by non-coastal and coastal area (2012, 2013, 2014)
(: not available)

Time / Geo	2012			2013			2014		
	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal	Total	Non-coastal	Coastal
European Union - 28	2.585.808.714	1.389.760.327	1.190.191.338	2.646.538.048	:	:	:	:	:
European Union - 27	2.523.624.789	1.388.097.183	1.131.736.215	2.582.119.756	:	:	:	:	:
Belgium	31.267.441	24.660.093	6.607.348	31.448.180	24.835.972	6.612.208	:	:	:
Bulgaria	20.252.038	6.459.210	13.792.828	21.617.474	6.911.056	14.706.418	21.698.391	7.483.621	14.214.770
Czech Republic	43.278.457	43.278.457	0	43.308.279	43.308.279	0	42.946.929	42.946.929	0
Denmark	28.040.235	2.576.932	25.463.303	28.500.837	2.597.092	25.903.745	29.646.899	2.619.518	27.027.381
Germany	350.349.425	289.244.719	60.749.736	354.871.005	292.335.778	61.978.647	366.527.398	302.115.614	64.408.483
Estonia	5.544.537	1.147.616	4.396.921	5.734.033	1.221.777	4.512.256	5.809.464	1.225.249	4.584.215
Ireland	28.884.907	:	:	28.286.434	10.491.073	17.795.361	29.166.382	10.558.500	18.607.883
Greece	**80.566.672**	**3.966.934**	**76.599.740**	**89.105.445**	**4.064.836**	**85.040.610**	**95.166.396**	**4.372.405**	**90.743.986**
Spain	382.670.976	79.665.837	303.005.138	389.211.987	79.182.311	310.029.676	403.963.022	86.047.265	317.915.758
France	400.525.558	268.760.343	131.765.215	408.126.035	269.049.439	139.076.596	402.315.167	265.208.790	137.106.376
Croatia	62.183.925	3.086.140	59.097.785	64.418.292	3.482.714	60.935.578	66.124.991	3.805.515	62.319.476
Italy	380.711.483	174.586.436	206.125.047	376.785.615	174.852.479	201.933.136	378.175.767	175.711.147	202.464.620
Cyprus	14.576.573	0	14.576.573	14.048.529	0	14.048.529	13.715.342	0	13.715.342
Latvia	3.546.736	581.993	2.964.743	3.775.192	616.731	3.158.461	4.158.418	715.594	3.442.824
Lithuania	5.741.252	4.354.238	1.387.014	6.089.056	4.654.974	1.434.082	6.465.004	4.927.185	1.537.819
Luxembourg	2.543.830	2.543.830	0	2.637.481	2.637.481	0	2.867.811	2.867.811	0
Hungary	23.169.533	23.169.533	0	24.426.148	24.426.148	0	26.053.873	26.053.873	0
Malta	7.832.229	0	7.832.229	8.501.147	0	5.801.147	8.780.948	0	8.780.948
Netherlands	84.050.408	58.614.669	25.435.740	96.074.132	67.258.741	28.815.391	99.751.562	69.004.106	30.747.456
Austria	109.540.720	109.540.720	0	110.687.373	110.687.373	0	110.440.776	110.440.776	0
Poland	62.014.890	46.852.263	15.162.627	62.959.452	47.412.298	15.547.154	66.579.589	49.952.057	16.627.532
Portugal	46.781.091	6.065.532	40.715.559	49.888.259	6.613.767	43.274.492	54.979.437	7.146.434	47.833.003
Romania	19.091.379	15.289.304	3.802.075	19.301.768	15.853.213	3.448.555	20.230.245	16.601.452	3.628.793
Slovenia	9.406.009	7.400.133	2.005.876	9.471.571	7.487.284	1.984.287	9.470.452	7.455.081	2.015.371
Slovakia	10.770.328	10.770.328	0	11.345.641	11.345.641	0	10.781.015	10.781.015	0
Finland	20.317.582	12.528.981	7.788.601	20.241.057	12.627.735	7.613.322	19.786.022	12.177.609	7.608.413
Sweden	48.585.972	18.758.460	29.827.512	49.710.427	19.263.834	30.446.593	52.280.371	20.055.426	32.224.945
United Kingdom	303.564.528	163.261.300	140.302.228	:	:	:	:	:	:
Iceland	3.719.126	425.559	3.293.567	4.280.685	498.713	3.781.972	:	:	:
Liechtenstein	141.042	141.042	0	135.303	135.303	:	132.272	132.272	0
Norway	29.914.832	8.907.837	21.006.995	29.310.429	8.553.884	0	30.614.057	8.767.586	21.846.471
Switzerland	:	:	:	:	:	20.756.545	:	:	:
Montenegro	9.151.236	293.010	8.858.226	:	:	:	:	:	:
Former Yugoslav Republic of Macedonia	1.459.771	:	:	1.499.076	:	:	1.519.013	1.519.013	0
Serbia	6.359.685	6.359.685	:	6.368.597	6.368.597	:	5.954.322	5.954.322	0

Source: Eurostat, 2015 (http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tin00178)

Table 10: Nights spent at tourist accommodation establishments by non-coastal area, by residents and non-residents (2012, 2013, 2014)
(: not available)

Time	2012			2013			2014		
Geo	Total	Residents	Non-residents	Total	Residents	Non-residents	Total	Residents	Non-residents
European Union - 28	1.389.760.327	844.283.219	545.477.108	:	:	:	:	:	:
European Union - 27	1.388.097.183	844.123.530	543.973.653	:	:	:	:	:	:
Belgium	24.660.093	10.906.374	13.753.719	24.835.972	11.015.046	13.820.926	:	:	:
Bulgaria	6.459.210	4.265.919	2.193.291	6.911.056	4.561.285	2.349.771	7.483.621	4.925.913	2.557.708
Czech Republic	43.278.457	21.484.472	21.793.985	43.308.279	21.163.383	22.144.896	42.946.929	20.836.817	22.110.112
Denmark	2.576.932	1.823.929	753.003	2.597.092	1.804.552	792.540	2.619.518	1.800.896	818.622
Germany	289.244.719	225.917.154	63.327.565	292.335.778	226.390.658	65.945.120	302.115.614	233.018.467	69.097.147
Estonia	1.147.616	773.792	373.824	1.221.777	804.577	417.200	1.225.249	811.651	413.598
Ireland	:	:	:	10.491.073	7.112.033	3.379.041	10.558.500	7.021.150	3.537.350
Greece	**3.966.934**	**3.220.118**	**746.816**	**4.064.836**	**3.157.717**	**907.119**	**4.372.405**	**3.235.895**	**1.136.510**
Spain	79.665.837	54.538.745	25.127.092	79.182.311	53.661.140	25.521.171	86.047.265	57.890.240	28.157.025
France	268.760.343	175.795.290	92.965.052	269.049.439	172.268.107	96.781.332	265.208.790	169.732.195	95.476.595
Croatia	3.086.140	1.032.755	2.053.385	3.482.714	1.093.798	2.388.916	3.805.515	1.111.089	2.694.426
Italy	174.586.436	83.711.989	90.874.447	174.852.479	82.029.645	92.822.834	175.711.147	81.354.491	94.356.656
Cyprus	0	0	0	0	0	0	0	0	0
Latvia	581.993	397.772	184.221	616.731	411.928	204.803	715.594	492.481	223.113
Lithuania	4.354.238	2.060.076	2.294.162	4.654.974	2.160.602	2.494.372	4.927.185	2.318.367	2.608.818
Luxembourg	2.543.830	245.762	2.298.068	2.637.481	324.357	2.313.124	2.867.811	354.226	2.513.585
Hungary	23.169.533	11.777.350	11.392.183	24.426.148	12.443.265	11.982.883	26.053.873	13.702.543	12.351.330
Malta	0	0	0	0	0	0	0	0	0
Netherlands	58.614.669	40.098.267	18.516.402	67.258.741	46.631.454	20.672.287	69.004.106	46.917.217	22.086.889
Austria	109.540.720	32.382.289	77.158.431	110.687.373	32.253.827	78.433.546	110.440.776	32.341.680	78.099.096
Poland	46.852.263	38.051.321	8.800.942	47.412.298	38.251.261	9.161.037	49.952.057	40.519.360	9.432.697
Portugal	6.065.532	4.158.343	1.907.189	6.613.767	4.475.106	2.138.661	7.146.434	4.755.741	2.390.693
Romania	15.289.304	12.198.382	3.090.922	15.853.213	12.578.519	3.274.694	16.601.452	13.074.226	3.527.226
Slovenia	7.400.133	2.818.544	4.581.589	7.487.284	2.723.955	4.763.329	7.455.081	2.612.105	4.842.976
Slovakia	10.770.328	6.730.918	4.039.410	11.345.641	7.068.043	4.277.598	10.781.015	6.928.868	3.852.147
Finland	12.528.981	9.619.373	2.909.608	12.627.735	9.593.010	3.034.725	12.177.609	9.258.633	2.918.976
Sweden	18.758.460	14.767.982	3.990.478	19.263.834	15.174.974	4.088.860	20.055.426	15.823.314	4.232.112
United Kingdom	163.261.300	77.854.000	85.407.300	:	:	:	:	:	:
Iceland	425.559	112.717	312.842	498.713	108.273	390.440	565.065	116.664	448.401
Liechtenstein	141.042	4.766	136.276	135.303	2.812	132.491	132.272	2.070	130.202
Norway	8.907.837	6.799.435	2.108.402	8.553.884	6.546.464	2.007.420	8.767.586	6.702.035	2.065.551
Switzerland	:	:	:	:	:	:	:	:	:
Montenegro	293.010	94.657	198.353	:	:	:	:	:	:
Former Yugoslav Republic of Macedonia	:	:	:	:	:	:	1.519.013	618.865	900.148
Serbia	6.359.685	4.593.058	1.766.627	6.368.597	4.489.389	1.879.208	5.954.322	3.879.642	2.074.680

Source: Eurostat, 2015 (http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tin00178)

Field research revealed that:

- in mainland-mountainous regions close to cities, with low level tourism development (e.g. Lefkochori, close to Thessaloniki and Serres), families and young couples with kids and schools visits is the main market. Visitors aged 10-28 years old prefer outdoor leisure activities (e.g. horse riding; mountain bike; playground; football; archery) while visitors over 40 years old prefer catering services. Local agro/rural tourism entrepreneurs estimate that the increase in visits has reached 30% annually the last 5 years (2010-2015) while the increase in turnover is estimated at 10% annually (more visits but due to economic crisis, visitors spend less money per visit).
- in island region, with high level tourism development (e.g. Crete), middle-aged guests or younger couples with children are the main market, who usually move with a private vehicle. Individual tourists book directly through companies' websites while organized group of visitors prefer booking through travel agents. The visitors make repeated visits, with a frequency of 2-3 years and they prefer to participate in multiple activities. Regarding inbound tourists (non-residents) are coming from Finland, France, Germany, UK, Italy, USA, Netherlands, Russia while concerning residents most of them are coming from prefecture of Macedonia.
- in mainland-tableland region, with developing tourism (e.g. Messinia), families and young couples are the main market which are interested for leisure activities while elder visitors prefer “soft” leisure activiti es (e.g. visit cultural attractions) and to travel in groups. Companies that “exploit” l eisure activities for teambuilding constitute another market as well as international educational institutions for short-run seminars and volunteers who want to participate in agricultural activities, while the cooperation with “sea-sun” hotels that operate in the area is an emerged market by offering common leisure packages. Inbound tourists (non-residents) are coming mostly from UK, Scandinavian countries, Poland and Belgium while internal tourism consists of urban cities residents who prefer “active Sundays”.
- in mainland-tableland region, with high level tourism development (e.g. Lake Plastira in Thessaly), the main market are Greek visitors from nearby cities, families and couples from middle class, who are booking directly themselves

without travel agencies. Even though no inbound tourists were mentioned, however, the internal tourists are considered as repeated visitors.

- in mainland-mountainous region, with low level tourism development (e.g Ano Poroia in Central Macedonia), the main age of visitors are 40-50 years old, couples and families, almost all of them booking directly, however few of the repeated visits are coming through tour operators but only for visit without night spending. School visits is another target market, mostly during spring while weekend visitors are coming from nearby places during the whole year, except August. Inbound tourists are coming from UK, Belgium, Netherlands, Germany, France, and Switzerland.
- in mainland-tableland region, with low level tourism development (e.g. Lake Vegoritida in Western Macedonia), most visitors are between 25 and 50 years old, travelling with their families but not in organized groups while inbound tourists are coming mostly from North US states, Canada and Germany.

Regarding the agro/rural tourism leisure activities that inbound tourists are participating when they visit Greece, visitors from:

- UK prefer bird-watching, cycling and walking;
- Belgium prefer bird-watching, cooking lessons and tasting, as well as participation in agricultural activities, like harvesting;
- France prefer cycling and walking; cooking lessons and tasting, as well as participation in agricultural activities, like gathering and visiting local producers;
- Germany prefer cooking lessons and tasting and participation in agricultural activities, like gathering wild herbs, grapes and olives;
- Scandinavian countries prefer cooking lessons, visiting local producers and tasting, as well as participation in seasonal agricultural activities;
- Netherlands prefer cycling and walking, cooking lessons and tasting, and participation in seasonal agricultural activities.

Accommodation statistics (European Parliament, 2013), show the full extent of seasonality in agro/rural tourism, and the large amount of spare capacity in the sector. Many less sophisticated enterprises, and many remote enterprises, have bed occupancy levels as low as 30%. But others surpass the typical national urban and

rural average hotel occupancy levels of around 65%. There are many reasons for these variations. Seasonality is one of them, but although a complex problem, it often be improved by market knowledge and product development.
Field research revealed that seasonality is recognized as the most important problem of the tourism industry in Greece and agro/rural tourism sector displays similar feature:

- island, with high level tourism development (Crete): peak season: April to October; low season: November to March.
- mountainous area, with low level tourism development (Lake Kerkini): peak season: October to June; low season: June to August.
- mountainous area, with high level tourism development (Lake Plastira): peak season: October to March; low season: May to August.
- tableland region, with medium level tourism development (Messinia): peak season: April to October; low season: January to March.

But will demand for agro/rural tourism be sustainable into the future? According to the Directorate-General for Internal Policies' study on industrial heritage and agro/rural tourism in Europe (European Parliament, 2013), agro/rural tourism seems set for a secure future and there are several features in its favor:

- The growing interest in physical and mental health puts outdoor recreation such as walking, cross country skiing, climbing, and cycling into a potential growth position, although health is rarely used as a selling point.
- The fear of a world outbreak of obesity backs the above point.
- The media industry produces large numbers of nature related TV programmes which act as para-marketing systems.
- Agro/rural tourism is closely linked to the growing area of food/culinary tourism.
- The on-going development of portable personal computing devices makes navigation by car, cycle and on foot, through the countryside and especially through forest and across mountain, much easier.

According to recent articles (www.tornosnews.gr, 2015a), the German specialist tour operators expand and modernize their travel programs, by offering most authentic experiences around the world in order to meet the new trends in demand and the new travel habits of German tourists, since the modern German traveler does not want a simple attraction tour but he is interested in communicating with the local community and experience the destinations visited, for example by tasting the local cuisine.

Additionally, based on a research that took place in 2014 regarding the demand for alternative/sustainable tourism offers in Germany (Marquardt, 2015), 31% of German-speaking population over 14 years old (21,9 million German-speaking residents) would be interest in ecological aspects while 28% (19,4 million German-speaking residents) would be interest in ecological and social aspects, which represents the total potential for sustainable vacation trips.

Moreover, in Birdfair thematic exhibition that was held during August (2015) in Leicester, it was found once again, that Lake Kerkini is included in all the major English agencies' leaflets as one of the top destinations for nature lovers and birdwatchers (www.tornosnews.gr, 2015b).

According to U.S. government's 2012 National Travel & Tourism Strategy, a significant number of international travelers seek out nature- and culture-based experiences, such as visiting historic sites (40% of overseas travelers), cultural sites (23%) and national parks (20%) (Task Force on Travel & Competitiveness, 2012).

Global report on adventure tourism (World Tourism Organization, 2014) refers that cycling tourism is on the rise across the world, with an increasing number of adventure tourists embarking on both road and mountain biking tours, since cycling brings in over EUR 44bn annually to Europe, resulting from 2.3 billion cycling trips with a tourism value, while positive growth has been charted by several U.S. states. Another leisure activities that are on the rise are backpacking, trekking and hiking and according to available data, in North America, 18.1% of Americans and 25.4% of Canadians have taken a day-long hike during 2013-2014 and 4% of Americans and 7% of Canadians took overnight camping trips while Hosteling International has over 4 million members worldwide, and their members are predominantly backpackers.

Additionally, based on World Youth Student and Educational Travel Confederation research upon leisure activities that are currently new or trending, cultural activities tend to be the most popular trend, followed by activities in nature (in 2007, 18.7% of WYSE members indicated that they participated in walking/hiking/trekking activities, increasing to 48% in 2013) (World Tourism Organization, 2014).

Furthermore, the Greek agro/rural tourism entrepreneurs themselves appear to be optimistic about sector's future. Characteristically, the owner of an organic agrotourism farm and guesthouse in the prefecture of Laconia in Peloponnese declares that when he started his enterprise, the strongest seasons were spring and fall as many of farming activities take place, but since 2014, the summer season has showed great strength and partly that is because people do not associate their summer vacation with only sun and sea but with mountains, inland as well as activities that help them grow.

Moreover, entrepreneurs consider that Baby Boomers, Gen-Xers, and Millennials will seek more intensively authentic "green" experiences as an escape from the stress of urban life. Agro/rural tourism entrepreneurs and sector's stakeholders expressed their hope that the sector will expand and demand will increase, since wealthy Europeans have changed their holiday habits, as well as Russian tourists, but as long as the agro/rural tourism product will be spatially organized and promoted through a website on a regional or even national level. Field research also shown that trends regarding agro/rural tourism product include the development of activities related to:

- "hard" or "soft" adventure activities (e.g. cyclin g; hiking; mountain hiking, climbing);
- gastronomy, local cuisine, high quality local products, and traditional recipes (e.g. olive oil, herbs) combined with visits to local producers;
- culture (e.g. mythology, local customs);
- physical and mental health (e.g. yoga sessions in nature);
- "glamorous" camping; and
- congress tourism, in correlation with leisure activities.

3.5 Assess of basic pre-conditions and critical success factors for engaging in agro/rural tourism sector

3.5.1 Investigation of entry barriers in the agro/rural tourism sector

First of all, before the detailed description of the factors that hinder the activity in rural tourism sector, in order to recognize and evaluate them, there should be made a reference to the main problems that the development of agro/rural tourism faces in Greece, focusing on agro/rural tourism businesses (Velissariou, 2009):

- *Failed investments.* The financing of investment was not accompanied by a thorough market research and a business plan, thereby demonstrating the feasibility and viability of the investment. As a result, these investments had uncertain prospects.
- *Improper investors:* For the majority of investments, the investors had no relation or knowledge regarding entrepreneurship in tourism, which leads not only to business mistakes, but also to low-quality services.
- *Lack of resources.* A large percentage of the businesses were based on subsidies but they really did not have the necessary resources for additional investments, or for the operation of the business.
- *Quality Problems.* Soft tourism shouldn't be identified with concepts such as extempore or cheap. Instead, it is a qualitatively upgraded tourism, which should ensure a high level of service.
- *Lack of training,* not only for qualitative service, but also for the business operation, thus resulting additional operational problems.
- *Lack of creating a grid of (supplementary) businesses,* which would offer all the basic and supplementary services to tourists such as accommodation, catering, entertainment and leisure activities.
- *Lack of organized sales promotion.* The main problem is the lack of organized promotion of sales and in particular the cooperation with travel agencies.
- *Lack of promotion and advertising measures*. Most rural accommodations have weakness to have an organized promotion due to lack of resources and expertise.
- *Failure of observance of soft tourism principles.* In most cases it was not taken into account the priorities of the development of soft tourism.

These problems bring out not only the problems that have to overcome in order to introduce young entrepreneurs in this field but also those that need to be addressed to improve the business activity of the already functioning businesses.

In addition to the above, according to Pevets (1990, as Ref. in Apostolopoulos and Sdrali, 2009), the existence of realistic agro/rural tourism growth probabilities requires satisfying a wide range of different kinds of conditions. In this section, the emphasis is to these factors that potentially act as entry barriers in agro/rural tourism sector.

These are:

- *The minimum required general and tourist infrastructure.* As found by the field research, rural tourism in Greece falls short of the European tourism services and infrastructure, particularly in mountainous areas.
- *Comfortable space for visitors,* either the already existing or with an ability to build one with minor investments. However, this period the ability to make an investment is partly limited, due to lack of liquidity and the inability of bank loans.
- *Attractive recreational equipment*, either on farming area or in the wider area. As recorded through the field research in most rural destinations there is not enough recreational equipment (e.g. outdoor activities) to be able to "convince" the visitor-tourist to stay at a destination for more than a weekend.
- *Knowledge:* a) applied mathematics, IT and accounting, b) basic foreign language. The field research also highlights the need for the operator of a agro/rural tourist enterprise to have skills of public relations, management and marketing. Given that the industry is dominated by family businesses where the owner takes over all operations with the help of family members, it is obvious that the requirements in knowledge and skills are great.
- *Professional advice from a well-organized marketing service.*
- *Professional management.*
- *Promotion of the agro/rural tourism product.*
- *Sufficient support from the public sector.*

Additionally, research by Kilipiris (2009), for investigating the behavior and attitudes of small business owners (the majority of agro/rural businesses falls into this category) compared with the principles of sustainable tourism development but also on how the response of these people is limited by their level of education, personal skills and knowledge of the business environment in which they act, show the following[1]:

[1] The field of the research is the area of North Pindos: Valia Kalnta- Pindos National Park. The survey included all SMEs operating in the region: a) hotels-accommodation, b) tour agencies c) food business and d) recreation and selling local products businesses.

- For a large percentage of businesses the target of business growth is not a key priority. The 74.3% of them did not make any changes since they first opened. Those who have made some changes (14.8%), they made just a few interventions such as TV installation in the rooms.
- The majority (75.6%) is unable to find some opportunities for business investment in the future. Only the 16.6% of those who say that there are opportunities consider taking advantage of it, when the rest of them mainly refer to the economic crisis as the main reason for not taking such an initiative.
- The majority of businesses employ members of the family up to 4 people (82.4%).
- A very low rate of education or training in the field of agro/rural tourism is recorded (97.2%) but the percentage of people that wishes to participate in some kind of educational activity related to the sector is very high (95.5%).

Accordingly, the international bibliography on the issue of the barriers in the agro/rural tourism sector (Velnisa Paimin, Modilih, Mogindol, Johnny, Thamburaj, 2014) reveals as main barriers the lack of knowledge and initial capital, as well as the difficulty to communicate well in English (Table 11):

Table 11: Barriers in the agro/rural tourism sector

	N	%
Lack of knowledge about tourism	80	96.4
Lack of capital	72	86.7
Poor command in English	72	86.7
Lack of information about tourism development in their area	71	85.5
Incentives from the government are scarce	60	72.3
Little control over development in their area	49	59.0
Difficult to secure employment	44	53.0
Poor infrastructure and facilities	40	48.2

Source: Paimin V., Mogindol M., Thamburaj J., 2014

Finally, since the female entrepreneurship and especially through the female agro/rural tourism cooperatives has played a key role in the development of the industry , the study considered it necessary, through literature review, mentioning in particular the barriers that a woman meets when she wishes to join on the agro/rural tourism sector. In particular, the main problems that have been recorded are (Gidarakou, 2007, as ref. to Apostolopoulos and Sdrali, 2009):

- *The insufficient training to a large percentage of members of rural cooperatives:* The combination of a low level of education and the old age of the members not only reduce the adaptability of flexible forms of production without external intervention and assistance, but also prevents the participation of young people and most educated members.
- *Organization and management problems:* These problems result from the lack of space workshops and machinery required for the production and standardization of quality products and warehouses. Furthermore, the lack of knowledge of the know-how of the production makes this situation difficult, so there are difficulties to maintain these products on the market and enlarge it. The inadequate administrative and organizational experience of cooperative women often causes problems in the division of labor among members, poor cooperation, difficulty in monitoring accounting, etc.
- *Lack of funds:* Many cooperatives have used various EC programs for their establishment, while many of them received financial assistance from the local authorities at the start of their operation. But the cooperatives themselves are still seeking public financial assistance and they seem to disagree with the view that they should build on their strengths to survive. Of course, to some extent, this is particularly difficult, as the low level of cooperative share leads to low available capital which is too insufficient to support investments. So these women are expecting a public financial assistance, while a small number of women's cooperatives loans from banks. In this context, it becomes very difficult to plan new activities or improve the operation of the existing ones.
- *The inefficient promotion and the weakness of advertising a product or service:* The main causes of the problem are the financial reasons, the lack of relevant expertise and the high cost of advertising. The advertising strategies that determine more easily and efficiently the provision and promotion of the products, such as using the internet, do not meet the technical expertise of the members of a women's cooperative, usually composed of older people -with

difficulty in the use of technical means- and residents of isolated geographic areas.

Moreover, development of agro/rural tourism with a special stress on agri or farm-tourism is the subject of many European countries' policies aimed at fostering global social and economic development of the rural areas which mostly suffer from the negative trends of deagrarisation and depopulation. Hence, the most frequent kinds of measures aimed at agro/rural tourism development enhancement are as follows (Petrić, 2003):

- administrative help that includes cheaper and faster start-up, easier access to necessary information,
- better legislation and regulation,
- availability of skills; training institutions will deliver skills adapted to the needs of potential tourist facilities' providers (a number of organisations worldwide have begun to develop training programmes such as; The United Nations Food and Agricultural Organisation through its Rome Office, COFRAT-Comite de Formation des Ruraux aux Activities du Tourisme in France, in Austria it is the Austrian Association for Regional Development etc.),
- taxation and financial matters; tax systems will need to make life easier for either farm enterprises as well as other enterprises involved with tourist activities in rural areas,
- easier access to finance; subsidies, structural funds, favorable bank loans will need to be improved; special incentives can be given to those regions that suffer from the process of depopulation more than others,
- building of the necessary infrastructure, and
- marketing.

Furthermore, a research (Wilson et al., 2001) made on 6 rural communities in the USA, each of them having important natural and cultural attractions and experience in tourism development for more than 10 years, has shown that there are 10 factors/conditions that are most important for successful tourism development in rural communities. They are as follows:

1. a complete tourism package;
2. good community leadership;
3. support and participation of local government;
4. sufficient funds for tourism development;
5. strategic planning;
6. coordination and cooperation between businesspersons and local leadership;.
7. coordination and cooperation between rural tourism entrepreneurs;
8. information and technical assistance for tourism development and promotion;
9. good convention and visitor bureaus; and
10. widespread community support for tourism.

In summary, the desk research result in three key groups of entry barriers in the agro/rural tourism sector in Greece: a) the economic - developmental obstacles, particularly in the current period of multi-faceted economic recession experienced by the country, b) the lack of knowledge in multiple levels and c) the incomplete planning (management, marketing, networking), which is inevitably a key business barrier to entry in the sector.

As regards the first group of entry barriers, it is important to briefly refer to the historical development of agro/rural tourism. Agro/rural tourism coincided in Greece with two important facts: a) the entry of Greece into the European Union in 1981, followed by the promotion of a program series for local and rural development, and b) the emphasis on issues such as the gender equality and the improvement of living standards in rural communities, especially in mountainous and disadvantaged areas (Tsapaki, 2011). Undeniably, therefore, the development and spatial organization in the Greek territory was affected by the number of funding programs for such entrepreneurs according to criteria such as the area of location of the business and its size (OPAAX for disadvantaged mountainous areas, LEADER for rural areas, development laws, operational programs, etc.). It is a fact that the majority of respondents, in the context of the field research, subsidized by such programs. Apart from funding from European and national sources, another important source of external financing is the bank debt, which has been limited in this period.

However, this barrier will degreased, as the Partnership Agreement for the Development Framework "NSRF 2014-2020" can act as a catalyst rebooting the

Greek economy and the Operational Programme “Compet itiveness, Entrepreneurship & Innovation” (EPAnEK) can be considered as the mea ns for strengthening entrepreneurship. Utilizing a Community Contribution of €3.65 billion (Public Expenditure €4.67 billion) from the New Programming Period budget, EPAnEK aims at creating a new developmental model centred on productive, competitive and extroverted sectors of the economy. The Priority Axis No. 3 “Development of mechanisms to support entrepreneurship” aims at upg rading the country's infrastructure in priority sectors that will help support entrepreneurship, and one of the main priority sectors is “Developing and/or pro moting economic activity based on natural capital and the cultural heritage of Greece, focusing on the Tourism sector” with allocated budget €57.787.428 (Ministry for Dev elopment and Competitiveness, 2014). Indicatively, eligible expenditures include interventions related to enrichment of the offered products with new services (extension in alternative types of tourism), to modernization and upgradation of the quality infrastructure and staff cost of existing or new personnel.

Moreover, on 11 December 2015, European Commission adopted Greece's Rural Development Programme for the 2014-2020 period, with €4.718.219.793 budget from the European Agricultural Fund for Rural Development (EAFRD), which goal is to help Greek rural areas to face the current economic, environmental and social challenges, and take advantage of the opportunities ahead of them (European Commission, 2015b). According to Nivelin (2013), the EAFRD will support activities in relation to agro/rural tourism, by using Community-led Local Development approach (LEADER), related to:

- Training, advice, farm visits
- Investments in businesses (incl. agri-tourism)
- Start-up aid for rural and farm businesses
- Infrastructure (incl. recreational)
- Small capacity accommodation
- Provision and development of services
- Tourist information
- Co-operational activities & marketing of tourism services
- Pilot & demonstration projects
- Clusters & networks

- Cultural heritage (incl. studies & maintenance)
- Natural heritage (incl. studies & maintenance)

The second group of key barriers has to do with education. The business field of agro/rural tourism is a field without special restrictions if someone wants to enter in it, as there was an absence of a specific institutional framework until recently (July 2014). Therefore, this sector attracts people without special training and experience in the field, which is a threat not only for the viability of the business itself but also for the agro/rural tourism in total. This is confirmed by the field research and supplements the basic principle that employees in agro/rural tourism are people without prior experience in the tourist object, especially given the fact that they are employed in another object.

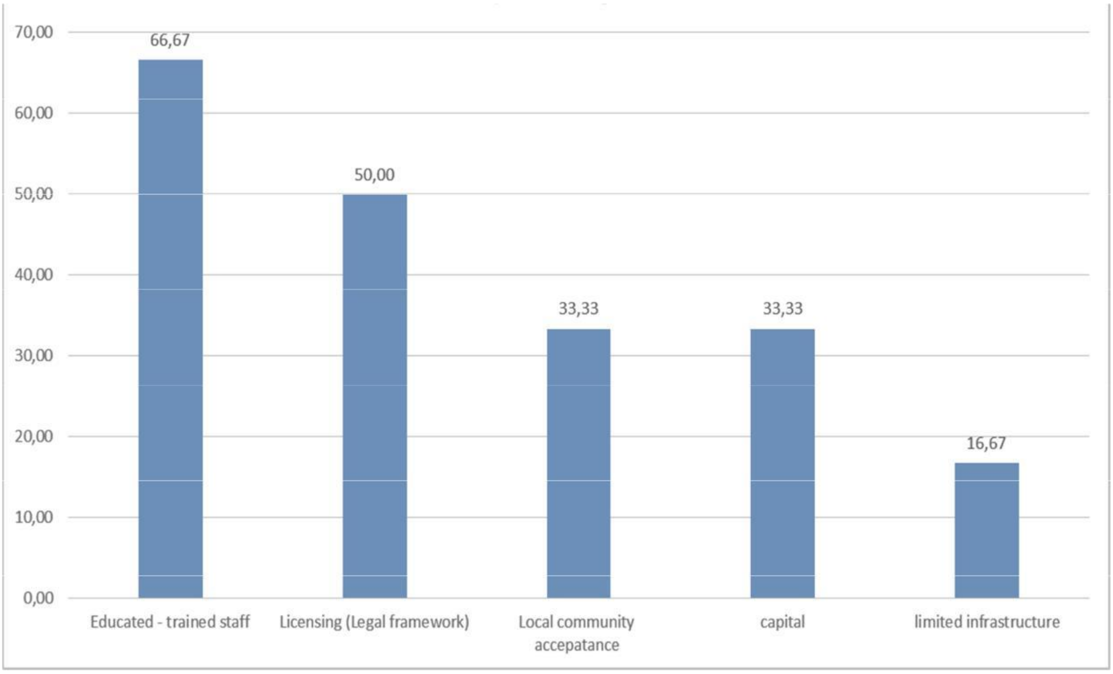
Finally, the main barrier of the lack of planning is multilayered. First, it has to do with the lack of planning at the central level for agro/rural tourism (strategy, objectives, measures, directions, spatial organization, etc.) and leads to a lack of planning at the enterprise level, which is linked to the capacity management, marketing and networking.

According to the results of the field research and specially to the answers that were extracted through the interviews with different stakeholders of agro/rural tourism sector, the representative of a private credit institution mentioned as a main entry barrier the limited access to finance. Even though he stated that European Union funding will be available for the period of 2014-2020, still access to capital remains critical and this stands as a barrier since most of the investment to deliver upgrades to existing business or establishing new businesses in the agro/rural tourism sector, will come from the private sector enterprises. This barrier was also mentioned by the representative of the private company that acts like Management Agency for National and Community Programs, additional of other barriers referred, as licensing issues, low level of business sector and difficulties to enter market places.

What is really interesting is the contradiction between the answers of representatives of public authority related to tourism (Ministry of Tourism) and the private federation of agro/rural tourism enterprises, since the public authority claimed that lack of knowledge of the agro/rural tourism sector is the main entry barrier, and need of consultancy was recognized, while the private sector's representative stated that bureaucracy and licensing issues (related to Municipalities and health services authorities) remain the main entry barrier. It is worth to mention, that the representative of federation of agro/rural tourism enterprises recognized that most of these businesses have started with the use of EU funding or loans, therefore capital has not been documented as a barrier to entry.

The following Figure 18 presents the main barriers to entry in agro/rural tourism sector in % percentage terms, according to the opinion of entrepreneurs and stakeholders interviewed during field research.

Figure 18: Importance of barriers to entry in agro/rural tourism sector, expressed in % percentage terms



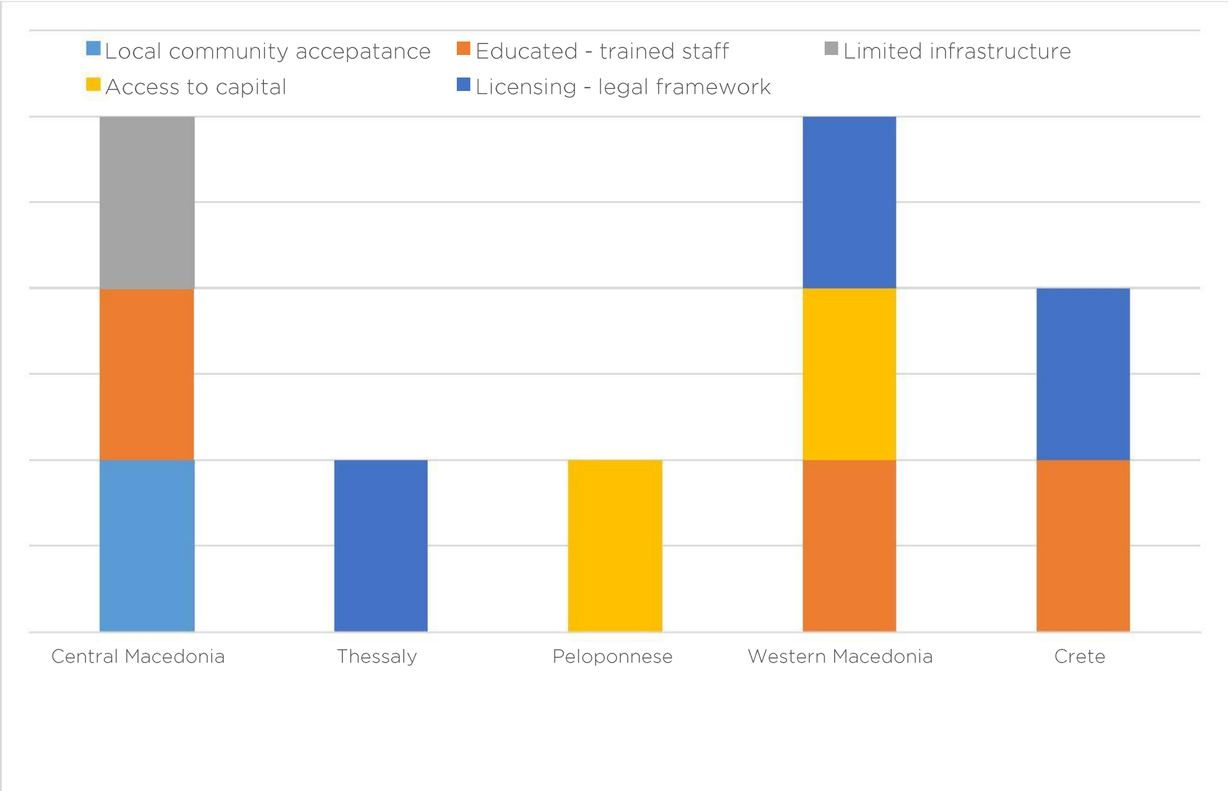
Source: Field research, 2015

Another entry barrier that was mentioned by the agro/rural tourism entrepreneurs was the low level of knowledge of the sector and the low level of professionalism, often referring to the employees of the enterprises (66.7%). This is a critical factor when someone wants to start and run a business. Low quality staff without skills creates bad services, less income and then unemployment. Another barrier to entry that has been recognized was the licensing – legal framework (50%). As a variety of services are provided in agro/rural tourism enterprises (horse riding, leisure activities, catering services, trekking, accommodation, etc.), the legal framework can get really complicated in order to receive all licensed. This requires time and also can be cost demanding depending on the case of enterprise.

Surprisingly enough, another barrier to entry mentioned by interviewees was the local community acceptance of a new business (33.3%). Every tourism business is part of the local community it operates in, contributing to the local economy and benefitting from a strong local appeal. This is not yet understandable in rural areas. Enterprises should be working in partnership with the local communities to improve the community and add value for the customer.

Regarding regional considerations, Figure 19 presents the barriers to entry in various regions of Greece. Central and Western Macedonia seem to have more barriers to entry to agro/rural tourism sector compared to Thessaly and Peloponnese.

Figure 19: Regional considerations regarding barriers to entry in agro/rural tourism sector



Source: Field research, 2015

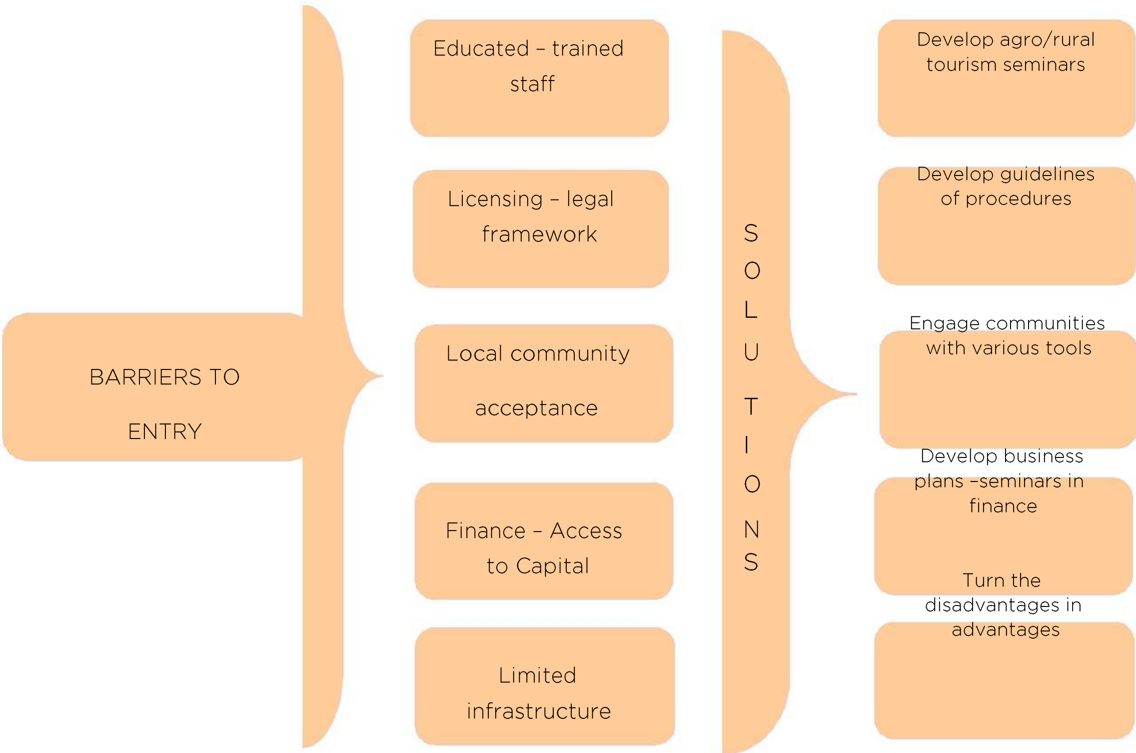
There are various reasons to explain the result below

- Peloponnese is a new tourism entry in Greece. The " Costa Navarino" investment had played an important role for this development.
- Thessaly has received many EU funding for the development of agro/rural tourism enterprises.
- Crete is touristic developed and it is difficult for small non-coastal enterprises to find skilled employees.
- Central Macedonia has high regional diversification. As some areas are not yet well touristic developed, barriers such as limited infrastructure and low local community acceptance are recognized.

In conclusion, as this sector is developed with people without special training and experience in the field, the main barrier to entry seems to be the level of knowledge of the business sector.

The following Figure 20 summarizes the barriers to entry in agro/rural tourism sector identified by the established entrepreneurs and possible solutions for the sector.

Figure 20: Barriers to entry in agro/rural tourism sector and possible solutions

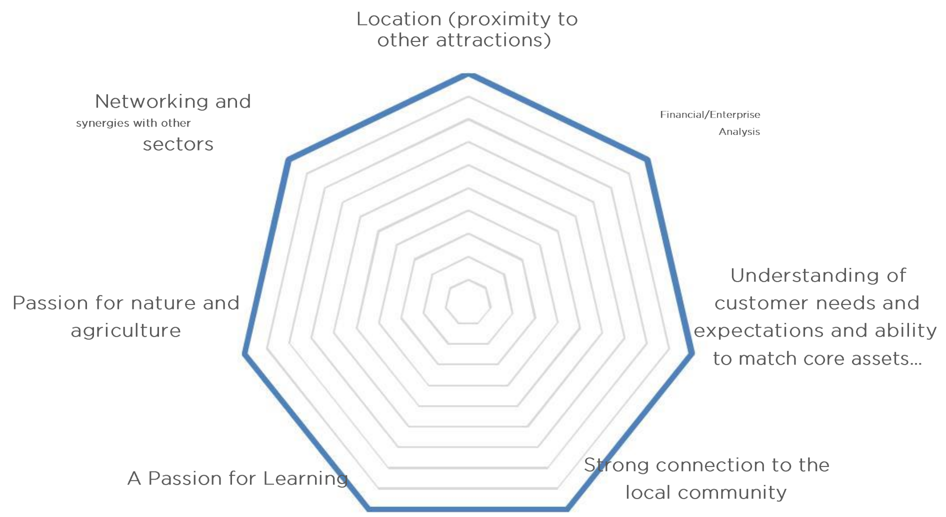


Source: Field research, 2015

3.5.2 Critical success factors for engaging in agro/rural tourism sector

The critical success factors according to desk and field research include various categories of aspects (Figure 21).

Figure 21: The critical success factors for engaging in agro/rural tourism sector



Source: Field research, 2015

3.5.2.1 Location (proximity to other attractions)

Location in tourism is the most critical factor to success and since agro/rural tourism is primarily a subset of tourism, location emerges as the primary factor of success. This fact was revealed through field research, since when entrepreneurs were asked if they were to start their company today, if they would choose the same location or another, 67% of the interviewees answered that they were satisfied with the location and show high commitment while 33% of them would choose a more popular place or even an another working opportunity. Regarding the regional considerations, it is interesting to mention that non satisfaction came from the entrepreneurs that are established close to Lake Plastira.

3.5.2.2 Financial/Enterprise Analysis

Financial/Enterprise Analysis is a factor critical to the success of any enterprise. The core competency required of managers is the ability to effectively manage the financial aspect of an organization, since the enterprise analysis is considered as the backbone of financial management.

The field research conducted the need of costing and financial analysis, as these aspects were identified between the topics that the agro/rural tourism entrepreneurs believe are worth attending and could contribute to the better functioning of their businesses. Due to economic crisis most of the businesses are facing liquidity problems and lower sales. Therefore proper costing and correct financial analysis are critical factors for the success of the business. Key financial skills include:

- Ratio analysis
- Forecasting and budgeting
- Break even analysis
- Profit center management
- Cash flow management
- Analysis of past performance
- Contribution analysis

3.5.2.3 Understanding of customer needs and expectations and ability to match core assets with customer requirements

The critical success factor for tourism is “focus o n the customer”, which results in “quality products and services”. Understanding cust omer requirements is the foundation for developing and delivering high quality products and services.

This fact was also recognized during the interviews with agro/rural tourism entrepreneurs. It was really important that some companies like “Trekking Hellas”, have managed to work with tour operators from Canada, U.S.A. and EU and also with free independent travelers. The success factor is that the company understands customers’ needs and expectations and they are offering custom-made services.

Subsets of this critical success factor discussed include:

- a strong connection to the local community;
- adding visible value to the product/service mix; and
- using core assets and consumer knowledge in product development process.

This need was heavily recognized during the field research, as many entrepreneurs declared that they need to attend training seminars on customer requirements, customer relations and offer of better services.

3.5.2.4 Strong connection to the local community

A strong connection to the local community is important for three reasons:

1. to develop a critical customer base that not only makes purchases, but also markets the enterprise by word-of-mouth;
2. to develop a supportive constituency available for market research; and
3. to enlist the support of local officials and agencies that can develop supportive policy and provide technical assistance when necessary.

Every agro/rural tourism business is part of the community it operates in, contributing to the local economy and benefitting from a strong local appeal. Agro/rural tourism owes much to local businesses working in partnership to improve the community and add value for the customer. However, field research shown that in Greece the connection of agro/rural tourism enterprises with local community is not so strong, although gradually it appeared that entrepreneurs have understand the importance of this connection and they have gradually taken steps to strengthen this bond (e.g. offer to local population job places, purchase of raw and auxiliary materials from local stores, etc.).

3.5.2.5 A Passion for Learning

Another critical factor is the Passion for Learning. Products and services that meet the core requirements of the customer are a direct result of enterprise learning from the customer. This critical success factor is driven by an urge to learn rather than to educate. The desk research demonstrated that successful agro/rural tourism operators in the U.S.A. had conducted extensive research prior to entering the sector.

Learning was noted in numerous forms both in desk and field research, while visiting operations similar whenever the opportunity presented itself, participation in exhibitions and reading association newsletters and trade magazines were mentioned by the entrepreneurs as proper methods of learning, besides the attendance of vocational training seminars.

3.5.2.6 Passion for nature and agriculture

Environmental protection and the passion for nature are critical in agro/rural tourism. Protecting the environment and sustainability is a key requirement and trend in tourism and especially in agro/rural tourism. For successful agro/rural tourism experience, it is critical for the entrepreneurs to provide visitors with:

- Information on local wildlife and the best viewing points, appropriate for the time of year.
- Information on local ranger services and events, like guided walks and talks.
- Information on local wildlife groups that welcome visitors on field excursions.
- A nature diary or notice board where visitors can write what they have seen while visiting.
- Information to engage the whole family, like I-spy self-guided walks.

The Greek Law No. 4276/2014 concerning the hostel/hotel categorization introduces environmental information as a mandatory.

3.5.2.7 Networking and synergies with other sectors

A critical success factor in agro/rural tourism industry is networking. The networking concerns the participation of the enterprise/entrepreneur in networks with similar or complementary activities at the local /regional and national and global levels, which may contribute to exchange of views, to promote knowledge, to help solve problems and generally in the addressing of economic and social needs which are not adequately covered by individual and often fragmentary actions. Moreover, the issue of cooperation is intended to expand beyond the business and to include cooperation between institutions, professional associations, individuals, public sector and local populations. In this way, it is achieved an active and effective dialogue that can lead to a broader consensus on the progress of the industry.

Uniting forces can become a stimulant to agro/rural tourism entrepreneurship in a local community. Failure to show sharing attitude with the potential competitor may lead to unpleasant business opposition hindering the agro/rural tourism enterprise. Chain collaborations with the local factors increases the margin of the agro/rural tourism product in providing synergistic services to the same group of visitors. Creating alliances with established stakeholders can secure synergy in the flow of visitors to the enterprise. Business associations and joint ventures may actuate the expansion of the enterprise through proliferation of outlets. Generation of synergies with competitive or supplementary organizations can create smooth effects in the market, leading to sustainable equilibrium of benefits for the enterprises and the clients.

In a number of European and global countries, efforts have been made to link organic farming to a special type of environmentally friendly agro/rural tourism. At a European level, ECEAT – the European Centre for Eco logical and Agricultural Tourism, holds records of, and publicizes, a number of organic farms that offer organic accommodation and food. At a national level, Austrian Farm Holidays have for a long time produced special marketing materials for organic farm members. In a global level, in Korea and to some extent in Japan, an organization marketing organic farm holidays to the buyers of organic food is working successfully as a two-way marketing synergy (Choo & Jamal, 2009).

Field research revealed that a agro/rural tourism enterprises in Greece have developed collaboration in a satisfactory level, but mostly in a non-typical way, without establishing formal clusters or networks, and commonly in local level but not in national or even regional. However, the importance of synergies with other sectors was emerged through interviews with agro/rural tourism entrepreneurs, since a wide variety of possible types of synergies has been recognized, like:

- development of common packages and clusters;
- development of common web sites and marketing material;

- common representation in touristic fairs managed by private DMO (Destination Management Organization);
- common branding in destination; and
- development of discount cards,

while some entrepreneurs have already moved towards this direction (e.g. a horse-riding enterprise started working with a local beekeeper, in order to enrich enterprise's touristic product and be able to address to different markets).

In conclusion the development of DMO's for agro/rural tourism and common websites/portals offering services and excursions is required as this will help with the development of agro/rural tourism sector and reduce unemployment indirectly.

3.6 Investigation of legal issues and licensing needed for agro/rural tourism sector

It is undeniable -as indicated by many writers- that agro/rural tourism in Greece, is significantly below its theoretical goals and the practice of other European countries, just because it hasn't been developed on the basis of a specific legal framework, whether it deals with the establishment and operation of an agro/rural tourism enterprise or the Greek spatial and development planning framework.

In particular, it is typical that most agro/rural tourism enterprises in Greece operate without elaborate institutional framework. Despite the large number of funding received by the agro/rural tourism businesses by national and European funding programs of the 1980s and especially the 1990s and 2000s onwards, they continued until recently not to be identified institutionally. As characteristically the President of Hellenic Agrotourism Federation stated during field research, " *Private investors in agro/rural tourism are exposed to the interpretations of the institutions implementing legislative Daedalus, while their investments in rural areas operate within the limits of legality, precisely because of lack of legal framework conditions of the agro/rural tourism enterprise*".

Given the fact that just over a year a specific legal framework for agro/rural tourism has enacted "Law No. 4276/2014 simplifying operatin g procedures tourism businesses and tourism, special forms of tourism and other provisions" (Official Government Gazette No. 155/A'/30.7.2014), under which specified

- Definitions (Article 28)
- Forms of rural tourism enterprises (Article 29)
- Exercise rural tourism activities (Article 30)
- Licensing livestock farming facilities involved i n rural tourism (Article 31)
- Distribution of agricultural products from rural tourism enterprises (Article 32)
- Certification of rural tourism enterprises - Special Label (Article 33)
- Control and supervision of rural tourism enterpri ses - Supervision (Article 34)
- Special insurance arrangements (Article 35)
- Existing enterprises (Article 36),

it is commonly believed that in the 30 years of implementation of agro/rural tourism activities leading up to Greece, the private initiative attempted to fill the gap in the institutional framework. However, even though the institutionalization problems seem to have been resolved on a theoretical level nowadays, it remains nonetheless the implementation of the law in practice.

More specifically, the agro/rural tourism enterprises within the meaning of the Greek Law No. 4276/2014 include:

a) Farms.
b) Rural and mixed farms, which must be accompanied by at least one of the following business organized services: 1) Catering services with compulsory use and offer products from the Agricultural Products Cart and/ or cottage industry products, 2) Services of tourist accommodation (hotels, organized tourist camps, youth hostels and non-basic hotel accommodation) with a maximum capacity up to forty (40) beds.

Furthermore, the agro/rural tourism enterprises can provide exhibition services, information, monitoring or participation in actions and activities that promote the contact of visitors and tourists with rural life, sustainable agricultural production, gastronomy, food and wine tasting and the protection of biodiversity.

In relation with the exercise of agro/rural tourism activities, the Law states that a decision of the Minister of Tourism and the appropriate Ministers will determine the identification, organization and implementation of individual or collective exercise of agro/rural tourism activities, the general and specific requirements, specifications and conditions operation and safety to be respected by the organizers of such activities, as well as the necessary documentation, and any other relevant issue. It has to be mention that this decision has not been issued until now.

Moreover, regarding the critical issue of certification of agro/rural tourism enterprises, the Law states that:

- The use of the term agro/rural tourism and its derivatives are reserved for agro/rural tourism enterprises only, as defined by this institutional framework.
- In agro/rural tourism enterprises, if they fulfill the general and specific criteria, the terms and the conditions specified by the decision of the Ministers of Tourism and Agriculture, they are awarded with the Special Label of Agro/Rural Tourism. By the same decision is also determined the way and the procedure of ascertainment subscription terms and conditions for the granting of the Special Label and any other relevant issue.
- A necessary condition for granting the Special Label of Agro/Rural Tourism is the acquisition by the company of all licenses which correspond to the specific activities.
- The Special Label of Agro/Rural Tourism bears a special logo and is granted by the decision of Minister of Tourism or by the authorized Regional Services, at a prior request of the enterprise concerned.

Finally, the Law 4276/ 2014 states that agro/rural tourism enterprises constitute a particular category of tourism enterprises and are recorded as such in the tourism business record book. The Law stipulates, also, that businesses or farms with agro/rural tourism activities, operating at the time of the Law publication, must to have harmonized their operations in accordance with its provisions within five (5) years from the publication.

In summary, the new institutional framework for agro/rural tourism is in the right direction. Now -with the new settings- rules, definitions and guidelines are introduced for the exercise of agro/rural tourism activity and agro/rural tourism is separated from other forms of Countryside Tourism. For the first time agro/rural tourism is defined as a special form of tourism in providing reception services and accommodation and/or focus on functional consolidated areas with rural facilities, which are offered in combination with activities related to agricultural production and enhancement of the rural landscape. However, one year after the adoption of the Law, the decisions about the conditions and standards for the exercise of agro/rural tourism activities have not progressed.

The Hellenic Agrotourism Federation (S.E.AG.E.) attempts to fill the gap above, and since 2010 it has proposed specific legislation to determine the conditions that will govern the lawful exercise of certain activities, such as production, processing and marketing of agricultural and farming products, conducting tours and agricultural activities, etc. (Hellenic Agrotourism Federation, 2010). According to this, key features are (A, B, C, D, etc. refers to different types of enterprises, as listed below):

A. Agritourism Hostel (accommodation facilities which operate in the countryside)

- Settlements or municipal districts with fewer than 3000 residents;
- If the accommodation facility belongs an area with more than 3000 residents, it will be outside the city zone and will be labelled as traditional or listed;
- The small accommodation capacity (up to 40 beds);
- The harmonization with local architectural standards;
- The offer of breakfast/meals made exclusively with local products;
- The distribution of information materials about tourism resources and the related enterprises in the area;
- The ability to communicate with guests in at least one foreign language;
- Mandatory involvement and presence of the owner in the business;
- The owners are mainly farmers, either as a unit or as a synergy ; and
- To be considered fit for agritourism activities, the accommodation facility must include at least one of the below described business activities (B, C, D, E and F).

B. Traditional taverns, cafés

- The activity of these enterprises is characterized by the availability of local products and by the use of traditional techniques and recipes;
- To be considered as an agritourism enterprise, the facility must include at least one of the following business activities among A, C, D, E, and F;
- The entrepreneurs must be mainly farmers committed to rural activities, either as a unit or as synergy; and
- Enterprises operating in licensed restaurants, bars, cafe, etc., can be integrated into agritourism businesses if they meet the above conditions.

C. Units for processing agricultural products

- Self-made bread and pastries;
- They process fruits and vegetables (jams, pickles etc.) in order to make them available for their customers;
- They possess and/or process animal products (cheese, eggs, honey, meat, sausages, etc.) for their customers;
- They must retail these products only in the premises of the enterprise and trade them also wholesale anywhere in Greece and abroad. The products that process and sell the above entities must come from local production;
- The entrepreneurs must be mainly farmers committed to rural activities, either as a unit or as a synergy;
- The respect of the hygiene and safety rules, as determined by the competent bodies; and
- To be considered fit for agritourism operations, the facility must include at least one of the business activity among A, B, D, E, and F.

D. Local products (retail local produce and crafts)

- The entrepreneurs must be mainly farmers committed to rural activities, either as a unit or as synergy;
- To be considered fit for agritourism activities, the facility must include at least one of the following business activity among A, B, C, E, and F.

E. Visit-farms (open to visitors, sell products to their guests and inform them about the production methods in use)

- The farmers rear and/or look after a limited number of animals within the premises of the farm (the number is related to the dimensions of the facilities) for the production and distribution of products;
- Visitors can have a choice among many products from the farm itself and the local produce, provided that the sale take place within the farm facilities;
- The farmers provide their guests with information, education and entertainment (e.g. about horses, birds, etc.);
- Given the limited number of animals, the facilities must be kept updated with sanitary standards as determined by the competent bodies, and ensure the safety of visitors; and
- To be considered fit for agritourism activities, the facility must include at least one of the business activity among A, B, C, E, and F.

F. Agritourism Activities (tours and/or outdoor activities like horseback riding, hiking, rafting etc.)

- A specially trained professional organizes and manages such activities as a self-employment;
- The operator offers the opportunity of tours with private or hired vehicles in the surrounding areas within the services provided by the company;
- Agritourism enterprises also provide visitors with courses related to the field of their activity (e.g. traditional crafts techniques, culture, traditional gastronomy, etc.);
- To be considered fit for agritourism operations the company must include at least one of the business activities among A, B, C, D, and E; and
- The operators must be mainly farmers committed to rural activities, either as a unit or as synergy.

However, since the conditions and standards for the exercise of agro/rural tourism activities have not yet progressed by Ministry of Tourism, a potential entrepreneur has to follow the procedures provided by the current institutional framework, related to each type of enterprise, as these are showed in the Tables 12-17 below.

Table 12: Licenses requirements in the case of agro/rural tourism accommodation establishment

License	Time Frame	Comment
Environmental impact assessment (EIA)	3 months – 1 year depending on size and location	In natural protected areas the EIA may take more time
Approval of Architectural Designs The architectural designs are approved and officially stamped at EOT, Directorate of Tourist Facilities, Technical Services Section	3 months to 1 year	In architectural protected villages this may need extra time
Building permit	3 months	Accessibility for disabled is required
Food preparation license	3 months	Includes HACCP procedures
Fire safety license	Up to 6 months	This is given in two steps (energetic and pathetic fire safety license)
Final GNTO license		
Other licenses like borehole, biological treatment plant, spa, swimming pool	Up to six months depending on the complexity	
Star or key certification	1 month	This procedure according to Law 4276/2014 may increase the final licensing time i.e. Greek breakfast certification

Source: Official Government Gazette No. 155/A'/30.7 .2014 (2014), Field research, 2015

Table 13: Licenses requirements in the case of agro/rural tourism taverns and cafes

License	Time Frame	Comment
Building permit license	Usually exists; may require change of use: 1-3 months	Accessibility for disabled is required
Food preparation license	3 months	Includes HACCP procedures
Fire safety license	3 months	
Operation license	1 month	
Other licenses like license to play music, selling cigarettes, selling products	Few days	

Source: Official Government Gazette No. 155/A'/30.7 .2014 (2014), Field research, 2015

Table 14: Licenses requirements in the case of units of processing agricultural products

License	Time Frame	Comment
Building permit license	Usually exists; may require change of use: 1-3 months	Accessibility for disabled is required
Food preparation license	3 months – 8 months	Includes HACCP procedures or ISO 22000 certification or agro certification
Environmental impact license	1-3 months	Depending on the production capacity
Fire safety license	3-6 months	
Other license may include trade mark, PDO, etc.	Up to 1 year	Depending on the requirement.

Source: Official Government Gazette No. 155/A'/30.7 .2014 (2014), Field research, 2015

Table 15: Licenses requirements in the case of units of local products (retail)

License	Time Frame	Comment
Building permit license	Usually exists; may require change of use: 1-3 months	Accessibility for disabled is required
Food preparation license	3 months – 8 months	Includes HACCP procedures or ISO 22000 certification or agro/bio certification
Environmental impact license	1-3 months	Depending on the production capacity
Fire safety license	3-6 months	
Other license may include trade mark, PDO etc.	Up to 1 year	Depending on the requirement.

Source: Official Government Gazette No. 155/A'/30.7 .2014 (2014), Field research, 2015

Table 16: Licenses requirements in the case of units of visit farms

License	Time Frame	Comment
Building permit license	Usually exists; may require change of use: 1-3 months	Accessibility for disabled is required
Environmental impact license	3 months	Includes HACCP procedures
Hygiene license	3 months	
Stable license	3 months	Depending on the size and number of animals
Fire safety license	3 months	

Source: Official Government Gazette No. 155/A'/30.7 .2014 (2014), Field research, 2015

Table 17: Licenses requirements in the case of units with leisure activities

License	Time Frame	Comment
GNTO license	1-3 months	
Licensed tour guide is required		HATTA requirement
Other license i.e. special activities		

Source: Official Government Gazette No. 155/A'/30.7 .2014 (2014), Field research, 2015

The fact of the complex licensing process and the time required for the completion of these multiple procedures, as presented in the preceding tables, was described by the agro/rural tourism entrepreneurs through the field research, as not adequate to the scope and size of the activities or even extensive (since they have to wait over a year to get the necessary license), while few of them said some complaints about the collaboration with public authorities during this process, and especially the Greek National Tourism Organization and the archaeological departments of Hellenic Ministry of Culture and Sports.

However it is critical to be mentioned that the licensing maturity of any new project is very important for access to national and European funding opportunities, since mature projects will be eligible for funding in programming period 2014-2020. The project maturity includes the stages presented in the Table 18.

Table 18: Stages of entrepreneurial project maturity

1st stage	Approval of Suitability of Plot of Land Issued by the Regional Offices of Tourism
2nd stage	Approval of Environmental Impact Study Issued by the Directorate of Regional Planning and Environmental Development of Regional authorities
3rd stage	Approval of Architectural Designs The architectural designs are approved and officially stamped at GNTO, Directorate of Tourist Facilities, Technical Services Section
4th stage	Building Permit Issued by the Town Planning Authority of the relevant Municipality
5th stage	Business plan

Source: Official Government Gazette No. 155/A'/30.7.2014 (2014)

3.7 Assess of knowledge and skills required for starting and operating an agro/rural tourism enterprise

Since the role of human resources in every business is crucial to the successful operation of it, let alone in the case of an agro/rural tourism business which is usually personified. Thus, it is absolutely necessary to refer to the knowledge and skills required for starting and running a business in the agro/rural tourism sector.

The conclusions from desk research converge in the following knowledge and skills:

- <u>Management with the use of these tools</u>: 1) *Alliances and partnerships with organizations and companies involved directly and indirectly in tourism* (e.g. companies that are sensitive to environmental issues, promotion of local products, an action plan for managing organic waste, etc.). 2) <u>Networking between companies and organizations</u>. Participation in networks, the knowledge acquisition and the development of relationships with other agencies are crucial to the sustainability of a company in today's competitive environment. This offers a significant advantage for small and medium-sized tourism enterprises, as the sector of the agro/rural tourism dominated by them, since their participation in networks can mitigate the effects of their small size and exploit economies of scale and scope. In terms of agro/rural tourism destination such networks may consist of hotels, restaurants, souvenir shops, and local tourist stakeholders. 3) *Quality assurance models*. In order to ensure the tourism industry has the desired level of quality applied by the so-called Quality Assurance Schemes / Standards, which refer to all organizational structures, responsibilities, procedures and instruments used by an organization to ensure a consistent level of quality the services provided (Dimou and Pitsouli, 2009).
- <u>Marketing Strategies</u>: 1) *Conduct of market research* (what is the target market, what are the needs, etc.) 2) *Development of a strategy* (analysis of current situation in the market, formulation of objectives, market segmentation), selection of the parts that will be the target markets, positioning of the destination in the consciousness of agro/rural tourism customer and development of a strong brand name for this purpose. 3) *Action plan* (product, price, promotion, distribution) (Koutoulas, 2009). In most cases the economic conditions do not allow the entrepreneur of an agro/rural tourism enterprise to assign these tasks to special / third person outside the business.

- Marketing relations: which means, developing, maintaining and increasing long-term relationships with individual customers. The ultimate goal of marketing relations is to make the individual guest loyal in business. The main result of all efforts is to make customers feel special and to believe that the enterprise has chosen to offer excellent care (personalization/adaptation to customer needs) (Glinia, 2009).
- Knowledge: 1) *About agro/rural tourism and responsible tourism* as it is important to understand the principles, as they are the cornerstone on which the entrepreneurs then will create solid entrepreneurial initiatives. 2) *Applied mathematics, IT and accounting*. 3) *Foreign languages*. 4) *Knowledge of the area of the enterprise is located, its environmental-cultural value and its identity.*
- Reliability and Empathy (refers to the friendliness and caring attitude manifested towards guests) (Glinia, 2009).

These results strengthen from the findings of field research, since all the entrepreneurs mentioned that they believe that they need training related to their business, regardless the operating years of their enterprises. Moreover, they stated that multi-task knowledge is required but access to knowledge could be complicated. The main sources of access to knowledge and skills required for starting and operating an agro/rural tourism enterprise found to be Internet or other entrepreneurs. The fact that the legal framework of agro/rural tourism has been recently developed proved that there is a gap in official training material and guidelines. However, other countries like UK provide special guidance to SMEs with the use of toolkits and a series of easy-to-follow guides to help new and existing tourism operators to make the most of their offering and develop robust business processes. Those guidelines have been specially designed to help agro/rural tourism with business evaluation, market identification and effective communication and marketing, as well as inspire business to create great visitor experiences.

Regarding the knowledge and skills that an entrepreneur of the agro/rural tourism sector must possess, according to entrepreneurs and stakeholders opinion, and which if there were offered, they believe that are worth attending, were:

- Wine testing

- HACCP procedures
- Marketing
- Human Resources management
- Business administration
- Costing of services/products
- Working with the local community
- Food and beverage security
- Organizing events
- New technologies in agro/rural tourism
- Accounting techniques and finance
- Guest experience
- Who is your quest – understanding guest needs
- Environmental protection

The variety of skills needed, as stated by the entrepreneurs themselves, proves the fact that was mentioned partly as an obstacle regarding the operation of the agro/rural tourism enterprises and relates to the difficulty to find skilled personnel, especially in rural areas, as well as the fact that agro/rural tourism entrepreneurs are considered as *life-style entrepreneurs*.

Finally, it is chosen to make a special reference to the most dynamic part of marketing, which concerns the communication policy, in particular the contribution of information and communication technologies (ICT) in agro/rural tourism.

Current generation ICT focus on mobility and social media integration and advances made in GSM availability of 3G and 4G technologies have made portability and real-time communication affordable and available among many agritourism value chain actors. These advancements have enhanced the competitiveness and sustainability of agritourism firms and played a key role in the revitalization of rural economies, employment generation and the promotion of local economy (Maumbe 2012).

We found that these technologies offer a multitude of benefits among different actors in the tourism value chain, which include (Baggio 2014): i) faster and more versatile cooperation, ii) increased information accuracy , iii) increase in efficiency by sharing and reusing of data and v) improved overall service delivery. The advantages these technologies provide, have led to their application in many agro/rural tourism aspects (Aivalis 2009), for dissemination of information through web applications, the systems of, special offers and booking services, the design and construction of informative portals, systems for electronic commerce, and online systems for CRM.

Furthermore, the importance of ICT in agro/rural tourism is highlighted as a revenue method of untapped potential and according to estimations from the National Bank of Greece, an increase from current levels to the average of Mediterranean EU countries, that is from eleven to twenty five percent, would lead to an increase of tourism revenue by almost one billion annually. The key factor to this finding is the fact that it refers to operation costs, thus it won't require an increase in bed places or related infrastructure. Increased profits stem from cutting down costs by reducing the role of intermediates role since services will be sold to the final customer directly, through the company's website, platform or mobile application (National Bank of Greece, 2015).

On this topic we found during field research an indicative case where the representative of a Finnish tourism office noted that he strongly believes Finnish tourists who travel to Crete Island for agro/rural tourism activities, would use a website or a mobile application regarding hiking, theme routs, mythology, plants and herbs, if it provided information for excursions, attractions, maps, accommodation, catering establishments, pharmacies and taxi telephones.

Regarding Greek oriented field research, in the following Table 19, we present our findings for e-commerce from our field research:

Table 19: Entrepreneurs' perception for e-commerce services

E-commerce and questionnaire	
1. Regarding company web site	
a. We don't have a company web site	10,00%
b. We have a website and we use it for (you can select more than one) :	
1. Information regarding products and services	90,00%
2. Customer feedback	30,00%
3. It offers options for online sales	50,00%
c. It is optimized for mobile browsing	70,00%
d. It is multilingual (more than three languages)	70,00%
2. Do you use a Smartphone or tablet?	90,00%
3. Select the e-marketing tools you use if any (you can use more than one) :	
a. Email marketing (Newsletters)	50,00%
b. Video marketing (YouTube promotion)	40,00%
c. SMS marketing	10,00%
d. Social media marketing	80,00%
e. PPC advertising (Search engine advertising)	60,00%
f. None of the above	20,00%
4. Have you developed a mobile application (you can select more than one)?	
a. No	57,14%
b. No but we are planning to develop one	28,57%
5. Would you use a web based platform to sell products directly to the customers?	
a. No	20%
b. Would use one	70%
c. Already use one	10%
6. Would you use a mobile application to sell products directly to the customers?	
a. No	20%
b. Would use one	70%
c. Already use one	10%

Source: Field research, 2015

Our first finding is that ninety percent of the survees own a web site, which is mainly used for products and services information and that half of them use e-commerce option. While mediocre customer support was found with only one out three utilizing web technologies, we found that all aspects of digital marketing are used; social media promotion was prominent with eighty percent, followed by SEO campaigns for better placement in search results with sixty percent.

From these findings we conclude, that there is a segment of the agro/rural tourism industry which is acquainted with such marketing tools and uses them extensively while others don't, which in turns point to an opportunity for extension of their operational model. This trend is also encountered in the fact that most are optimized for mobile viewing and offer multilanguage support, which points to the fact they have invested in web technologies; but also in the seventy percent we found, regarding future usage intentions for sales on an online platform.

For the mobile aspect of sales, we found that most of the survees use a smartphone and that almost one out of three plans to develop a mobile application, which is further solidified by the fact that seventy percent would use one, to direct sales to the customers.

3.8 List of institutions providing courses / vocational training on agro/rural tourism

Regarding the institutions that provide academic courses or vocational training on tourism generally, the desk research revealed the followings:

a. Public education and training bodies:

- Business Administration Department, Division: Hospitality and tourism management, Technological Education Institute of Athens.
- Department of Tourism Management, Technological Education Institute of Thessaloniki.
- Department of Tourism Management, Technological Education Institute of Patras.
- Department of Business Administration, Division: Tourism management, Technological Education Institute of Piraeus.
- Higher School of Tourism Education of Crete (ASTEK).
- Higher School of Tourism Education of Rhodes (ASTER).
- Department of Business Administration of the University of Aegean, Division: Tourism.

However, the above mentioned studies programs do not include courses for the development of agro/rural tourism. Courses related to agro/rural tourism can be found in the following study programs:

- Faculties of Physical Education and Sport Science: The courses related to agro/rural tourism are: Outdoor Sports Activities, Sports Recreation in Tourist Centres, Basic Principles of Leisure & Recreation, Organizing Cultural & Recreation Events, Sport Tourism & Recreation, Technical Climbing, Organization & Administration Sports - Cultural Events, and Experiential Activities.
- Departments of Agriculture, Forestry and Natural Environment: Some of courses related to agro/rural tourism are: Rural Tourism and Special forms of tourism.

b. <u>Private education and training institutions</u>

- American Farm School- Perrotis College: The courses in the Agrotourism Specialization include the following: E-Commerce, Food Science Technology, Creating the Agrotourism Experience, Sustainable Rural Development, Food & Accommodation, Current Issues, Principles of Quality Control, Work Experience II, Dissertation or Enterprise Project.
- Private Institutes of Professional Training (IEK): Professional technician in rural tourism, National Parks and Recreation Areas Guide, Mountain Guide.
- Vocational Training Centers (KEK).

c. <u>Consulting and guidance</u>

- National Organization for the Certification of Qualifications and Vocational Guidance (EOPPEP).

From the above, it is concluded that in Greece there are institutions that offer academic training in tourism in general but not specifically for agro/rural tourism, while the only provider of comprehensive curriculum on agro/rural tourism is Perrotis College of American Farm School.

3.9 Agro/rural tourism sector SWOT Analysis

The SWOT analysis was constructed as a matrix and was populated with a correlation analysis of each internal factor (strength or weakness) with the external factors (opportunities and threats). This was determined with the following method. When examining the correlation of a strength with an opportunity, if the strength enhanced the ability to take advantage of the opportunity, a (+) score was assigned, while if it had a negligible correlation with the opportunity a (0) score was assigned. In examining the correlation of a strength with a threat, if the strength protected against the threat, a (+) score was assigned, while if it had a negligible correlation with the threat a (0) score was assigned. Similarly, when examining the correlation of a weakness with an opportunity, if the weakness compromised the ability to take advantage of the opportunity, a (-) score was assigned, while if it had a negligible correlation with the opportunity a (0) score was assigned. In examining the correlation of a weakness with a threat, if the weakness made the sector more susceptible to the threat, a (-) score was assigned, while if it had a negligible correlation with the threat a (0) score was assigned.

After populating the cells of the matrix with the scores (0, - or +), the sum of each factor is obtained (horizontally for the internal factors and vertically for the external factors) by adding all (+)'s and subtracting all (–)'s. The total obtained horizontally gives an indication of the relative importance of each strength or weakness for a given sector.

The total obtained vertically for each opportunity, gave an indication on how well the sector was poised to take advantage of available opportunities, and for each threat, how susceptible was the sector to existing threats.

The analysis of the scores was used as a tool for deciding which of the internal factors (weaknesses) were good candidates for developing actions that would minimize these weaknesses. In addition, the effect of each action on increasing the score of the opportunities and reducing the threats was determined. Similarly, significant strengths were identified for utilization.

STRENGHTS

- Unique nature landscapes and biodiversity suitable for the development of soft – hard agro/rural tourism activities . In terms of biodiversity, Greece is one of the richest countries of the European Union. Its diverse features, ranging from high mountains to the deepest waters of the Mediterranean - including a 16,000-km-long coastline and some 10,000 islands - combine with a variable climate generating a great range of habitat niches and a spectacular flora and fauna. Greece hosts some 6,600 taxa of vascular plants with the highest number of endemics in Europe (approximately 1,450 taxa, which are 22% of the total indigenous flora). The fauna comprises 115 mammal species, 12 of which are marine, 446 bird, 22 amphibian and 64 reptile species. Moreover, 162 freshwater and 476 marine fish species are hosted in Greece's waters. Some 30,000-50,000 invertebrates are also present, exhibiting a very high degree of endemism, exceeding 50% in some groups. At present, the Natura 2000 network consists of 425 sites, covering around 4,200,000 hectares, which represent 27.2% of the total land and 6.1% of the total marine area of the country.
- Great history, archeological and cultural heritage. To visit Greece is to join an (at least) 5,000-year-old story. The boundaries between myth and history become blurred in this land. The ‘300’ is not just a movie ; the Odyssey is not just a book. They are instead milestones on the course of human history and the development of civilisation.
- Good climate. The climate in Greece is typical of the Mediterranean climate: mild and rainy winters, relatively warm and dry summers and, generally, extended periods of sunshine throughout most of the year. A great variety of climate subtypes, always within the Mediterranean climate frame, are encountered in several regions of Greece. This is due to the influence of topography (great mountain chains along the central part and other mountainous bodies) on the air masses coming from the moisture sources of the central Mediterranean Sea.
- Local products (food and culinary). Greece is producing a variety of local products. From olive oil, feta, mastiha of Chios, honey, raki, wine, herbs, crocus of Kozani, koum kouat and many more. Traditional Greek cuisine is based on the pure products from Greek Mother Nature to form a balanced nutritional model

that can ensure a better quality of life and physical health. Products with unique quality and unsurpassable nutritional value are offered in most areas in Greece. These have blended together and created a noble cuisine rich in nutritional ingredients, which can satisfy the high gustatory and nutritional needs of modern man.

- Sufficient air transportation and port infrastructure. Greece has plenty of airports and ports. Greece has 45 airports -15 international state airports, 26 domestic state airports, and 4 municipal airports and many of these airports, especially on the islands, primarily serve tourists and handle charter flights while Greece has more than 140 ports that serve passengers and cargo.
- Safe destination. Security in traveling is becoming an important aspect. In 2015 the world faced various terrorists' attacks. Greece remains a safe country. The immigrant problem is not a risk for the tourism sector at the moment. The destination risk is considered to be really low.
- Multi – interest established enterprises . In Greece we can find a multi - interest established enterprises, including farms, wineries, lodges, catering and leisure activities. These offer unique experiences to guests, in combination with the natural and man-made attractions.
- Family bonds stronger in economic crisis – family i nvolvement into business. "*In Greece the family is everything, thank God, because right now it's all there is*", said Themis's wife Maria in guardian few years ago (http://www.theguardian.com/world/2011/aug/02/greece-family-ties-debt-crisis).

  The family involvement strengths the smaller companies and is a great asset for agro/rural tourism. The proprietor's family is normally directly involved with every aspect of the business, reacting efficiently and promptly to any problem arising. Their involvement in running the enterprise provides considerable benefits, especially in having a very flexible and dedicated workforce which tolerates unsociable working schedules. Family members feel committed to the long-term prosperity of the enterprise and often do not distinguish between their professional and family life.
- Emergence of a positive sectoral culture. Strong social or even professional ties start to emerge in rural areas, in some case studies, maybe as economic impact of economic crisis.

WEAKNESS

- Insufficient ground transport, mostly road networks in rural areas. There are areas in Greece where the transportation road network is insufficient. The long distance rail network in Greece is limited. This increases transportation but reduces sustainability and brings supply problems. During the winter period some areas cannot be reached easily.
- Insufficient guidance signs across road network. Signage across road network is critical for agro/rural tourism. Most enterprises are not located in central places or villages and it is really hard for traveler to find appropriate signage and road names, especially for cycling and biking tourism. Good transport links destinations, because even attractive regions can be almost unsuitable for tourism market if they are not easily accessible from the population centers.
- State of cluster development. The cluster development in agro/rural tourism is limited in offering common tourism "packages" and o ther services. At the moment, only Regional Agrotourism Unions exists in specific Greek prefectures and the Hellenic Agrotourism Federation, which promotes its members and their affiliated companies, but not in a common manner (e.g. route).
- Difficulty in establishing a relationship with the local communities. Field research identified difficulties in establishing a relationship with the local communities. Networking is essentially about building contacts and establishing long-term relationships with people who can help businesses.
- Untrained / inexperienced staff. Field research revealed that the sector has enormous needs for trained – experienced staff, whi le the sector has many requirements regarding skills of staff. According to SETE Intelligence (2014), trained employees will be able to find jobs in areas with demand while untrained staff will phase challenges and unemployment. 33% of Europeans and 45% of Greeks entrepreneurs said that the skills shortage poses serious problems of cost, quality or time on their business. Therefore, employers, if they are not able to find skilled staff, they prefer not to hire instead of investing time and resources for the training of young people.
- Seasonality. Seasonality is a "congenital" characteristic of a gro/rural tourism in Greece which consists of temporal and spatial variations of demand during the

year. Causes of seasonality depend on natural and " institutionalized" factors, causing ecological, social and economic impacts.

- Limited participation in international specialized networks. Greek agro/rural tourism enterprises have limited participation in specialized networks. Specialized networks have been developed recently and are an important asset for sectors such as agro/rural tourism enterprises.
- Limited web presence. Agro/rural tourism enterprises have limited presence to Internet with static websites. Internet nowadays has positive impacts to tourism industry.

OPPORTUNITIES

- European and national funding. Greece has a great opportunity. Funding programs (e.g. NSRF 2014-2020, Greece's Rural Development Programme for the 2014-2020) can boost tourism industry and agro/rural tourism sector in the coming years.
- Political willingness to extent the touristic season with exploitation of alternative and special interest tourism. According to an announcement by the Hellenic Tourism Ministry, the strategy that Greece will follow in 2016 will include a series of actions that will focus on the international promotion of the tourism brand name *"Greece"* , along with the showcasing of new Greek destinations and alternative forms of tourism.
- Growth of tourism sector in general and many expectations. Greek tourism is on track during 2015 with a record of 26 million international arrivals. International air arrivals increased by 5.7% to over 15 million during January-November 2015 period, which corresponds to nearly 820.000 additional arrivals compared to the same period of 2014.
- Shift of demand to alternative forms of tourism / special interest tourism. Global tourism trends show that there is a shift to alternative forms of tourism / special interest tourism. Field research revealed that most of the established enterprises have increased sales and they are looking for expansion.
- Increasing establishment of alternative tourism travel agents, domestic and abroad. Through Europe and through the world, alternative tourism travel agents

are becoming a trend and this is a great opportunity of the Greek agro/rural tourism sector.

- Application of new technologies. Change and disruptive technology are taking place and consumers consider this fact as attractive. Businesses can grow lot faster with the use of new technologies. Social media and Internet are a game changer to the industry.
- Trend shift of consumers towards traditional products of high certified products. Traditional certified agricultural products are really successful in Greece and abroad. Certification brings recognition and maturity to a product. Feta for example is a PDO and is known globally. Same could happen with olive oil, wine, honey, etc.
- Development of tourist packages, i.e. connection of “sea and sun” with agro/ rural tourism. The “sea and sun” touristic product is the most d eveloped at the moment in Greece. Linking the “sea and sun” tourism product with agro/rural tourism could bring enormous advantages to both products; a) further develop the “sea and sun” product with unique experiences and b) boost the agro/rural tourism sector.
- Low cost of living in periphery. The periphery of Greece has much lower cost of living than the cost of living in cities. This could be an opportunity of young people and young families to move to countryside and start their own agro/rural tourism business.
- Incentives for farmers to protect the environmental and sustainable use of natural resources. Protecting the environment and increasing the sustainable use of natural resources is a must for local communities and EU policy. Farmers can play an important role. Carefully planned agro/rural tourism can make a contribution to conservation of animal and plant genetic resources.

THREATS

- Bureaucracy – High number of days to start a busine ss and get all the licenses. Greece has one of the most complicated licensing systems in Europe. All investors have to deal with licensing and it’s more difficult to get a license in special areas such as Natura 2000 protected areas. Depending on the business establishment, opening a new business could take from 6 months to 1.5 year. This is a threat for “new” capital as delays revenues an d extents payback period.

- Complexity of tax legislation. Tax legislation is always a puzzle in Greece. Taxation is pretty high (26%) and VAT is 23% in services and 13% in tourism accommodation. The complexity of tax legislation is one of the most important barriers of investment this period.
- Young unemployment. As unemployment continues to grow in Greece, young capital is moving from rural areas to developed areas in order to find more job opportunities.
- Lack of experience of life-style entrepreneur. The life style entrepreneur, who moves from the cities to develop a small life style agro/rural tourism business usually lacks of experience and has little connection with nature.
- Necessary skills are not supported by the educational systems. In Greece agro/rural tourism studies are not supported by educational institutions. Limited specialized knowledge develops uncompetitive business.

Table 20: SWOT Analysis matrix for agro/rural tourism sector

	Total opportunities										Total threats						
	3	-1	0	1	1	4	5	3	2	3	3	4	2	3	4		
Unique nature landscapes and biodiversity	+	+	+	+	+	+	+	+	0	+	+	+	0	0	+	12	Total strengths
History, archeological and cultural heritage	0	+	+	+	+	+	+	+	0	0	+	+	0	0	+	10	
Good climate	0	+	+	+	0	0	+	+	0	+	0	0	0	0	0	6	
Local products	+	+	0	+	+	+	+	+	0	+	+	+	+	+	+	13	
Sufficient air transportation and port infrastructure	0	+	+	+	+	+	0	+	0	0	0	0	0	0	0	6	
Safe destination	0	0	+	+	+	0	0	+	0	0	0	0	0	0	0	4	
Multi – interest established enterprises	+	0	0	+	+	+	+	+	+	0	+	+	0	+	+	11	
Family involvement into business	0	0	0	+	+	0	+	+	+	+	+	+	+	0	0	9	
Emergence of a positive sectoral culture	0	0	+	+	+	+	0	+	0	0	+	+	+	+	+	10	
Insufficient ground transport	0	0	-	-	-	0	0	0	0	0	0	0	0	0	0	-3	Total weaknesses
Insufficient guidance signs across road network	0	0	-	-	-	0	0	-	0	0	0	0	0	0	0	-4	
State of cluster development	0	-	0	-	-	0	-	-	0	0	-	0	0	0	0	-6	
Difficulty in establishing a relationship with the local communities	0	-	0	-	0	0	0	-	0	0	-	-	0	0	0	-5	
Untrained / inexperienced staff	0	-	-	-	-	-	0	-	0	-	-	-	-	0	-	-11	
Seasonality	0	-	-	-	-	0	0	0	0	0	0	0	0	0	0	-4	
Limited participation in international specialized networks	0	-	-	-	-	0	0	-	0	0	0	0	0	0	0	-5	
Limited web presence	0	-	-	-	-	-	0	-	0	0	0	0	0	0	0	-6	
	European and national funding	Political willingness to extent the touristic season with exploitation of alternative and special interest tourism	Growth of tourism sector in general and many expectations	Shift of demand to alternative forms of tourism / special interest tourism	Increasing establishment of alternative tourism travel agents, domestic and abroad	Application of new technologies	Trend shift of consumers towards traditional products of high certified products	Development of tourist packages, i.e. connection of "sea and sun" with agro/ rural tourism	Low cost of living in periphery	Incentives for farmers to protect the environmental and sustainable use of natural resources	Necessary skills are not supported by the educational systems	Lack of experience of life-style entrepreneur	Young unemployment	Complexity of tax legislation	Bureaucracy – High number of days to start a business and get all the licenses	37	Total

4. Conclusions and Recommendations

Agro/rural tourism exists in many parts of Alpine Europe for over a century, has grown rapidly, and in a unique way across most of Europe (and worldwide). It is unique because it is the first type of tourism that is not – as yet – resort based. It is extremely broad in content, encompassing nature tourism, ecotourism, adventure tourism, food/culinary tourism, and many other emergent developments.

Agro/rural tourism claims to offer benefits to the economy with many job opportunities, to heritage protection, to local communities where they operate and to the wider society, however lack of statistical data and integration of many parts of the sector within other sectors, does not permit to fully appreciate how strong the agro/rural tourism sector can be.

It seems to set for a secure future since people will seek more intensively authentic "sustainable" experiences as an escape from the str ess of urban life while the growing interest in physical and mental health puts outdoor recreation into a potential growth position.

But businesses need to consider very carefully how they pitch their enterprises, to take maximum advantage of the marketing opportunities afforded by rural images. They also need to understand how to understand "perceive d rurality" so that their activities do not damage the reality or image of the countryside. In order to boost agro/rural tourism sector and market niche development, integrated approaches (agriculture, tourism, culture, local infrastructure) are needed, local products integration into tourism development concepts, and knowledge how to know what is needed and where.

The situation can be improved, by developing branded rural agro/tourism regions, created as partnerships between providers and stakeholders, increasing stakeholders' knowledge, using more effective marketing, and putting to use the ideas of slow tourism, food tourism, synergy with high margin agricultural production, and the use of tourism as a tool for rural regeneration, rather than just as an end in itself.

TOURISM SECTOR PROPOSALS

A) Opportunities for easy victories:

1. Trend shift of consumers towards traditional products of high certified products
2. Application of new technologies
3. Incentives for farmers to protect the environmental and sustainable use of natural resources
4. Development of tourist packages, i.e. connection of "sea and sun" with agro/ rural tourism
5. European and national funding

Strengths to rely on, in order to take advantage of these opportunities

- Local products (food and culinary).
- Unique nature landscapes and biodiversity suitable for the development of soft – hard agro/rural tourism activities
- Multi – interest established enterprises
- Great history, archeological and cultural heritage
- Emergence of a positive sectoral culture

B) Opportunities that can be taken advantage of only after redressing balance of strengths/weaknesses

1. Low cost of living in periphery
2. Shift of demand to alternative forms of tourism / special interest tourism.
3. Increasing establishment of alternative tourism travel agents, domestic and abroad

Weaknesses to alleviate in order to take advantage of such opportunities

1. Untrained / inexperienced staff
2. Limited web presence
3. State of cluster development
4. Limited participation in international specialized networks
5. Difficulty in establishing a relationship with the local communities.
6. Insufficient guidance signs across road network

Proposals for Part B of the Project:

Relevant to A) Opportunities for easy victories:

1. Honey! I lost the route (short term)

This proposal refers to the development of a “culin ary route” based on honey; bee and other products derived from apicultural production, mostly through networking beekeepers and rural tourism businesses. The tourist product created will consist of activities related to culinary tourism, to ecotourism, and to “experience-based”.

Actions include identification of skills needed and development of training material; training (beekeepers; tourism entrepreneurs; local authorities), and networking (identification of honey culinary route’s quality standards). The project can be organized and executed by AFS in collaboration with the Apiculture Department of AUA. In its full development, the trail will operate synergetically with other existing or emerging trails, for instance dairy, wine, oleo etc.

2. Food guide of rural Greece (medium term)

This proposal refers to the development of curriculum of Food Guide Programme and to establishment of National Framework Qualification Award. Graduates Food Guides will be ready to “connect” the culinary experience with the place of the production (farm) and the history and culture of the way of the production (tradition). The need for this very specialized aspect of this profession has been identified by the Greek Tourism Confederation (SETE) and communicated to AFS. Initial research on the part of AFS has identified the Harokopio University of Athens as a promising partner for developing the syllabus and delivering the training.

3. Development of informative portal “agro/rural touri sm” (medium term)

This proposal refers to the development of an informative portal which includes locale information with meta information (e.g. natural resources; tourism enterprises and farms; festivals, etc.); interactive access; search radius capabilities; booking options; and contact forms with involved parties. Special emphasis will be given on filter options to narrow down search, including calendar, thematic, age and accessibility issues, product or services and other features. For customized thematic packages, map integration incorporating the fore mentioned features should be included while the portal will be accompanied by mobile application.

4. Experience the liminal places of Greece: Messolonghi, a town by the lagoon - a pilot project (medium – long term)

This proposal refers to the development of synergies between maritime tourism (boating; yachting) and agro and culinary tourism based on the local products (e.g. bottarga; fleur de sel; olive oil; sun-dried tomatoes), environmental interest tourism along its lagoon, as well as its historical heritage (death place of Lord Byron) for "high-profile" and "niche" markets, in order to loc ally capture value of maritime tourism.

Messolonghi is a perfect real life laboratory for the development of alternative tourism; it combines a rich bundle of resources that have largely been under-utilized to date. At the same time, it benefits from investment (Dutch investor) in a modern marina that connects it to the well-established maritime tourism sector (http://messolonghimarina.com/wordpress/?page_id=66). Both the Dutch investor and extrovert local entrepreneurs (http://www.messolongifields.com/) are stakeholders of this project.

Relevant to B) Opportunities that can be taken advantage of only after redressing balance of strengths/weaknesses:

1. Training courses for high school & university graduates – potential employees - on the following subjects (short term)

This proposal refers to the development of a training programme regarding Alternative Tourism Management. The courses (table below) can be offered on a modular basis; core courses involve 36 instruction hours and specialist courses 42 hours each. Specialist courses involve both on-campus and off-campus delivery. Work-based Experience involves eight weeks placement. Individual courses can build up into a Certificate/ Diploma.

Core courses
Introduction to Alternative & Sustainable Tourism Trends
Visitor Psychology & Behavior
Leadership & Communication skills
Legislation and Ethics in the Travel and Tourism Sector
Destination Network and Cooperation
Creating Visitor Experiences
Incident & crisis management
Finance, Costing & Pricing
Specialist courses
Heritage, Religious and Cultural Tourism Management
Special Interest Tourism (aged, children, special needs people etc)
Wilderness travel, Hiking
Wellness & Health Tourism
Water environment sports
Mountain environment sports
Culinary Tourism
Agrotourism. Principles & Practices
Urban Tourism
Work-based Experience

2. How to develop your agro/rural tourism business? Agro/rural tourism business toolkit (short - medium term)

The proposal refers to the development of an easy-to-follow guide to help new and existing agro/rural tourism operators to make the most of their offering and develop robust business processes. The guide will be focused to young entrepreneurs and include 5 business guides (marketing plan; how to work with suppliers and other businesses; make the most for your visitors; sustainability and climate change; and sharing economy guidelines) and training material. The need has been identified by the Hellenic Agrotourism Federation and communicated to AFS.

3. Cycling networking routes with agro lodges stops (medium term)

The proposal refers to the development of cyclingtourism product, by the establishment of service guidelines and standards for the lodges and the destination, the development of a guide of cycling tourism with the use of GIS and interactive internet maps and the certification of all cycling stops (lodges, farms, restaurants etc.) based on specific quality and sustainability criteria.

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6. Appendix 1: Field research questionnaire

I. INFORMATION ABOUT THE ENTREPRENEUR/ENTERPRISE

1. Enterprise's Capacity
2. Number of employees, skills/knowledge, full-time/part-time
3. Place of origin (entrepreneur)
4. Level of education (entrepreneur)
5. Knowledge of foreign languages (entrepreneur)
6. Level of IT skills

II. EVALUATION OF DEMAND AND DEVELOPMENT PROSPECTS

7. Which is the low and peak season of touristic demand?
8. Describe the rate of change of your company (e.g. turnover; number of visitors) in the last 5 years (2010-2015, during economic crisis!!)
9. Describe the profile of your customers or those who visit the broader area (e.g. demographic, ethnographic characteristics, habits, individual/organized, way of booking: agency or Internet)
10. How do you expect/evaluate the changes of rural tourism sector within the next 5 years (e.g. shrinkage, expansion, stability, tourists' countries of origin, etc.) (industry growth rate according to the demand of tourists and not supply)
11. According to your beliefs, which are the current market trends (e.g. type of packages / activities).
12. Do you believe that there are opportunities for new comers to the sector?

III. ASSESSMENT OF SUPPLY

13. Do you know which or what kind of companies are operating in the surrounding area?
14. Do you know any other rural tourism businesses that are operating in Greece?
15. Please explain the future plans for your business? (e.g expansion, modernization)
16. Are there any other services or products that you plan to add to your existing activities offered?

IV. OVERVIEW OF THE CRITICAL FACTORS

17. Basic infrastructure needed during the establishment and operation of your business (e.g. connection to water supply, sanitation, road network, waste bins etc)
18. Please evaluate the service that are or are not available at the area and how are they affecting the operation of your business (e.g banks or ATM, airport, port, railway station).
19. Which was the main reason/factor that led you to establish the business in this specific area (e.g mountain, private land, your origin)?
20. If you were to start your company today, would you choose the same location or another? If it is another location, which one? Please explain why.
21. Please explain the advantages of establishing your company in this area?
22. Please explain the disadvantages of establishing your company in this area?
23. Did you have any advisory/consulting support during the establishment as well as during the operation of your company?
24. To what extent are the family members engaged in the everyday operation of the business? Please evaluate their engagement (important/ necessary/ suspensive).
25. Does the local community support your business? If yes, please explain how.
26. Do local authorities support your business? If yes, please explain how.
27. Are you part of any associations related to your business (SEAGE)? Please evaluate their involvement in the sector.
28. Do you believe that being part of such associations has an impact to the sustainability of your business?
29. Which are the critical factors / preconditions for the sustainable operation of your business? (knowledge, IT skills, easy access to partners/supliers)
30. If you were to start your company today, what modifications would you make to your initial business plan (including all the stages until its operation, e.g less rooms)?
31. What would you advise/ highlight to a new comer in the rural tourism sector?

V. INVESTIGATION OF ENTRY BARRIERS TO THE SECTOR

32. Which are the major problems that you faced during the beginning of the operation?
33. Which are the major issues that you faced during the operation of your business?
34. Which are the major growth obstacles that the rural tourism sector is facing?

VI. INVESTIGATION OF LEGAL ISSUES/ LICENCING

35. Which is the legal form of your business and why did you choose? If you were to start now, what would be your choice?
36. Which public authorities did you contact during the establishment of the business and which ones during the operation?
37. How would you evaluate this collaboration? Can you estimate the time needed from the establishment of your business till the licensing?
38. Is there any quality assurance certificates that you possess, are aware of or that you could acquire for your business?

VII. KNOWLEDGE AND SKILLS OVERVIEW

39. Which are the sources that you use in order to get information related to the sector?
40. Have you attended any seminar related to your business? If yes, to what extend was it helpful for establishing or running your business?
41. Do you believe that you need training related to your business?
42. What seminars (topics) do you believe are worth attending and would contribute to the better functioning of your business?
43. Do you keep contact (telephone, face to face) with businesses of the sector in order to enrich your knowledge (e.g problem solving, licensing issues)?
44. Which knowledge and skills must possess an entrepreneur of the sector (eg financial knowledge, communication skills)?

VIII. SYNERGIES WITH OTHER SECTORS

45. In the overall operation of the business, have you developed or do you want to develop synergies with other companies/businesses (eg farms, handcrafts / cottage industries, leisure activities, lodging)?
46. In the overall operation of the business have you developed or do you want to develop synergies with public institutions (eg municipal enterprise, municipality, etc.)?
47. If you have already created any kind of synergies, did you follow any specific "model" (e.g discount cards, common promotion in we bsites or exhibitions etc)?
48. If you are cooperating with other businesses, did you sign any contract of cooperation with specific terms? Do you believe that such contracts should be signed in these cases?

IX. ESTABLISHMENT/INSTALLATION COST, OPERATIONAL COST & FINANCING

49. Establishment/ installation cost (by category of expenditure, eg buildings, equipment, research, etc.).
50. Estimated operating costs by category (operating, supplies, salaries, promotion).
51. How did you raise funds for establishing your business?
52. If funded by any program, what costs did the investment include and would you do it again? Was the disbursement process easy?
53. If you were loaned by any banking institution, were the disbursement process and the cooperation easy? Would you do it again?
54. What other investments did you make in your business till today besides the initial establishment (eg modernization of equipment, extension, etc.)?

X. WEBPAGES & PROMOTION

55. In what ways is your company promotes?
56. In which websites / social networks is your business registered?
57. How does you company benefit from these websites/ social networks?
58. Which of the methods used is considered to be the most effective?

Part A: Web tools, mobile applications and e-marketing current usage

The following questions are about your web site, on how you use it, update it and its features and also about mobile applications and e-marketing

1. Circle the answers which hold for your company web site (you can select more than one)
   a. We don't have a company web site
   b. We have a website and we use it for (you can select more than one) :
      1. Information regarding products and services
      2. Customer feedback
      3. Online sales options
   c. Who updates the content (you can select more than one)?
      1. I update the content myself
      2. An employee updates the content
      3. An external collaborator updates the content
   d. It is optimized for mobile browsing? Yes No
   e. It is multilingual (more than three languages) Yes No
   f. It offers options for online sales Yes No

2. Do you use a Smartphone or tablet?

a. Yes b. No

3. Select the e-marketing tools you use if any (you can use more than one) :

   a. Email marketing (Newsletters)
   b. Video marketing (YouTube promotion)
   c. SMS marketing
   d. Social media marketing
   e. PPC advertising (Search engine advertising)
   f. None of the above

Part B: e-trading, e-services and e-marketing needs

4. Would you use a web based platform to sell products directly to the

customers? a. No b. Would use one c. Already use one a. No b. Would use one

c. Already use one

7. Appendix 2: Field research interviews list

A/A	BUSINESS/ ORGANIZATION	TYPE	DATE	ENTREPRENEUR	GIS COORDINATES
1	Avaton	Business/Educational Farm	8/10/2015	Grigoriou Chryssa	N 4463220 E 499284
2	Agnati	Business/Horse riding-Restaurant-Hotel	10/10/2015	Georgakopoulos Giannis	N 4531788 E 422050
3	Ktima Likno	Business/Restaurant-Café-Sport Activities	10/10/2015	Granouzis Ioannis	N 4531194 E 421602
4	Piraeus Bank	Organization/Bank	13/10/2015	Papaioannou Vasileios	N 4497693 E 411061
5	Ano-Kato Café	Business/Café	16/10/2015	KontodimasDimitris	N 3918130 E 517834
6	Villa Kynthia	Business/Hotel	16/10/2015	Miliaraki Korina	N 3919284 E 562621
7	Carob Mill Cultural Center	Business/Cultural Activities	16/10/2015	Miliaraki Korina	N 3919274 E 562432
8	Fabrica Houses	Business/Hotel and Farm-Culinary Activities	17/10/2015	Frantzeskakis Nikolaos	N 3917826 E 518389
9	Agroxenia	Organization/ Union	17/10/2015	Frantzeskakis Nikolaos	
10	Kreetan Keittio ABC	Business/Travel Agency in Finland	17/10/2015	Merja Tuominen-Gialikaki	
11	KEPA-ANEM S.A.	Organization/Managing Authority	19/10/2015	Kessanidou Galateia	N 4490654 E 415163
12	Trekking Hellas	Business/Alternative Tourism Services	19/10/2015	George Benardis	N 4211156 E 483175
13	Greek Ministry of Tourism	Organization/Public Authority	20/10/2015	Tricha Persephone	N 4497657 E 411124
14	Captain Vassilis Foundation	Organization/Non-Profit Private Foundation	22/10/2015	Papadatos Dionysis	N 4086762 E 295669
15	Explore Messinia	Business/Alternative Tourism Services (Hiking Tours, River Activities)	23/10/2015	Kontoargyris Georgios	N 4101027 E 331675
16	Art Farm Marini	Business/Farm and Events	23/10/2015	Marinis Sotirios	N 4092336 E 337379
17	Tourism Dept. Municipality of Thessaloniki	Organization/Public Authority	27/10/2015	Pengas Spiros	N 4497203 E 411351
18	Xatzivaritis Estate/Winery	Business/Estate & Winery	27/10/2015	Iakovidou Olga	N 4527311 E 371550
19	Oreiades Suites	Business/Hotel	29/10/2015	Palmou Eleni	N 4354896 E 301671

20	Fagopoti	Business/Restaurant	29/10/2015	Psifi Xenia	N 4353350 E 302750
21	Aiolides	Business/Hotel	28/10/2015	Zevgara Georgia	N 4353173 E 303034
22	Oikoperiigitis	Business/Alternative Tourism Services	29/10/2015	Reklos Ioannis	N 4562804 E 423438
23	Pestrofes	Business/Restaurant	29/10/2015	Theodorakelis Georgios	N 4571770 E 419290
24	Viglatoras	Business/Hotel	29/10/2015	Kallesis Stelios	N 4570663 E 419011
25	Farm Naoumidis	Business/Farm & Restaurant	30/10/2015	Naoumidis Petros	Farm: N 4511041 E 309007 Restaurant no.2: N 309709 E 4509896 Museum/restaurant: N 309975 E 4510477
26	Alfa Estate	Business/Estate & Winery	30/10/2015	Iatridis Aggelos	N 4507090 E 306069
27	Aquaculture Olympiada	Business/Fish Farm	17/11/2015	Georgiadis Sotiris / 6977206511 / Olympiada-Stratoni	N 4488904 E 489871

8. Appendix 3: Field research interviews coverpages

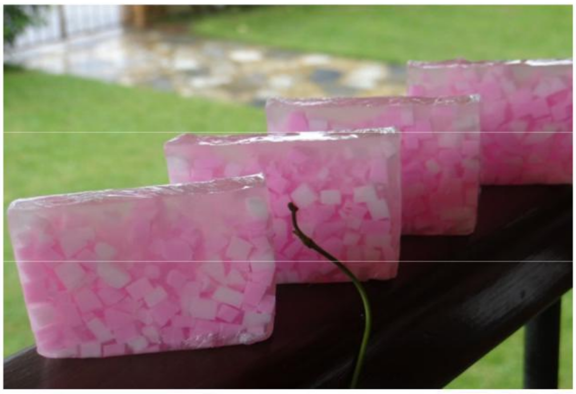
1)

<table>
<tr><td>Study No & title: No. 5 Agro/Rural Tourism</td><td>Researcher/s:
Emmanouilidou Maria</td><td>Date: 8/10/2015</td></tr>
<tr><td colspan="2">Company title: Avaton</td><td>Business Type:
Educational and experimental farm</td></tr>
<tr><td colspan="2">Address: Ouranoupoli, Chalkidiki 63075 Greece (400m. far from Mount Athos)</td><td>Website: N/A</td></tr>
<tr><td>Contact person: Grigoriou Chryssa</td><td>Mobile: +30 6974 106878
e-mail: info@avatonfarm.gr</td><td>GPS location
N 4463220
E 499284</td></tr>
<tr><td colspan="2">Main activity sector:
B2B B2CB2G</td><td>Other activities: Accommodation, Camping, Activities (cooking, mountain bike, canoe & boat, diving photo tour, mountain walking, stargazing)</td></tr>
<tr><td>Year of establishment: 2016</td><td colspan="2">Management & ownership: Grigoriou Chryssa</td></tr>
<tr><td colspan="3">Annual turnover: has not started yet
o Up to 200.000
o 201.000 – 400.000
o 401.000 – 600.000
o 601.000 – 800.000
o 801.000 – 1.000.000
o 1.000.001 and over</td></tr>
<tr><td colspan="3">No of employees (TF equivalent): not yet [(1)]
o Up to 10
o 11 – 20
o 21 - 30
o 31 - 40
o 41 - 50
o 51 & over</td></tr>
<tr><td colspan="3">Level of activity: local/ regionalnationalexporter importer</td></tr>
<tr><td colspan="3">If exporter, main markets:
According to the owner’s meetings with visitors of the broader region, that noticed her farm, she expects that visitors mostly from France; Germany, Northern Europe.

If importer, national origin of main imports: N/A</td></tr>
<tr><td colspan="3">In Greece, main geographical markets:</td></tr>
<tr><td colspan="3">The owner will mostly rely to thematic organizations/associations that are established in the city of Thessaloniki.

Short company history/ researcher notes:
Chrysa had participate in the educational programme “Agrotourism Certification” in American Farm</td></tr>
<tr><td colspan="3">School during (February 2013), where she received training on the professional skills required to initiate an agrotouristic enterprise and following an examination received the Certification developed by the project, and that seminar gave her the inspiration to deal with agro/rural tourism. Then, she followed the theoretical entrepreneurship seminars (2013) "Start-up and management of Small Medium Entrepreneurship” and "Development of Entrepreneurial Thinking”, as well as the experiential seminars “Cultivation of Aromatic Plants”, “Greek Herbs and usage in Cosmetology” and “Ecological Agriculture”, in order to organize an experimental educational visiting farm in Ouranoupolis (Chalkidiki), in the 10 acres family owned farm. At this moment, she has to deal with licensing and she has to decide what kind of license she will go for (e.g. tourist office).
(1) According to the owner, when the farm will start to operate, besides the owner and the 2 members of the family, the farm will occupy 2 part-time employees (1 for territory cleaning and 1 for taking care of the farm).</td></tr>
<tr><td colspan="3"></td></tr>
</table>


avaton
ΕΚΠΑΙΔΕΥΤΙΚΟ
ΠΕΙΡΑΜΑΤΙΚΟ
ΑΓΡΟΚΤΗΜΑ



2)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Vlachou Charisia & Emmanouilidou Maria	Date: 10/10/2015
Company title: Agnanti		Business Type: Accommodation & Restaurant & Activities
Address: Leukochori Thessaloniki 57017 Greece		Website: www.aloga.gr
Contact person: Georgakopoulos Ioannis	Mobile: +30 6944 776258 e-mail: info@aloga.gr	GPS location N 4531788 E 422050
Main activity sector: B2B ☐ B2C ☐ B2G ☐		Other activities: horse riding; archery; motorization; canoe; basketball; mountain bike; playground
Year of establishment: 1996 (horse riding) 1999 (accommodation) 2001 (restaurant+rest activities)	Management & ownership: Georgakopoulos Ioannis & Kotelli Vasiliki (wife – owner of the accommodation enterprise)	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional national ☐ exporter ☐ importer ☐

If exporter, main markets:

~~If importer, national origin of main imports:~~

~~In Greece, main geographical markets:~~

Mostly from the cities of Thessaloniki; Kilkis; and Serres and occasionally from Athens and Greek islands.

Short company history/ researcher notes:

Giannis and his wife were searching for a place away from the city (of Thessaloniki), to live peacefully, to raise their children, but most of all to be close to the nature and to the horses that they adore. So, they found Leukochori, 40km away from the city of Thessaloniki, and since they adore horses, they establish initially the horse riding center. By taking in mind the emerging needs of visitors (for horses) for hosting and catering, they establish later the accommodation enterprise (in 1999) and then the restaurant/café and the different activities playgrounds (in 2001), by having as a target market the residents of nearby cities.

3)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Vlachou Charisia & Emmanouilidou Maria	Date: 10/10/2015
Company title: Ktima Likno		Business Type: Restaurant/Café; Activities & Social Events
Address: Leukochori Thessaloniki 57017 Greece		Website: www.ktimalikno.gr
Contact person: Granouzis Ioannis & Georgiadou Chryssa	Mobile: +30 6942 409410 e-mail: info@ktimalikno.gr	GPS location N 4531194 E 421602
Main activity sector: B2B ☐ B2C ☐ B2G ☐		Other activities: basketball; mountain bike; playground; swimming; football; laser guns; archery; BBQ
Year of establishment: 2006	Management & ownership: Granouzis Ioannis & Georgiadou Chryssa / Georgiadou Chryssa	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- o Up to 10
- X 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional national exporter ☐ importer ☐

If exporter, main markets:

If importer, main markets:

In Greece, main geographical markets:

Mostly from the cities of Thessaloniki (70%); Kilkis (15%); and Serres (15%). 2014: 100.000 visitors.

Short company history/ researcher notes:

The entrepreneur (with her place of origin coming from Leukochori) found that while in region since the late 90s, 2 horse riding tourism businesses existed, the region was not recognized to the public as an agrotourism destination, mainly because of the quality of services, since the local environment is considered appropriate for the development of alternative types of tourism. So, in 2004 she and her family started with the establishment of an integrated multi-services recreational park in Leukochori, 40km away from Thessaloniki, with the establishment initially of a traditional Macedonian tavern which hosts traditional cuisine restaurant and cafe (completed in December 2005). In 2007, Ms. Georgiadou proceeded in the establishment of a sports and recreational park, by creating a mountain bike track, a fully equipped basketball field, a football field 5X5 according to UEFA specifications, a bungee-jumping system and outdoor ping-pong field. In 2008, the company also has created an adventure park and a paintball field, to complete sports and leisure activities in the existing agrotourism farm.

4)

Study No & title: 5 Agro/Rural Tourism	Researcher/s: Maria Emmanouilidou	Date: 13/10/2015
Company title: Piraeus Bank Group		Business Type: Private Credit Institution
Address: Tsimiski 132 & Ethnikis Aminis, Thessaloniki, 54621		Website: www.piraeusbank.gr
Contact person: Papaioannou Vasileios	Mobile: +30 2310 293581 e-mail: papaioannouvas@piraeusbank.gr	GPS location N 4497693 E 411061
Main activity sector: B2BB2CB2G ☐ ☐		Other activities:
Year of establishment: 1916	Management & ownership: Michael Sallas, Chairman of the Board of Directors	

No of employees (TF equivalent):

- o Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- 51 & over

Level of activity: local/ regionalnational ☐ exporterimporter ☐
In Greece, main geographical Markets: the whole country

Short company history/ researcher notes:
Piraeus Bank today leads a group of companies covering all financial activities in the Greek market (universal bank). Piraeus Bank possesses particular know-how in the areas of medium-sized and small enterprises, in agricultural banking, in consumer and mortgage credit and green banking, capital markets and investment banking, as well as leasing and factoring. These services are offered through the Group's nation-wide network of 778 branches and 1,849 ATMs, and also through its innovative electronic banking network of winbank. Headquartered in Athens, Greece, with more than 20th employees in offices in 9 countries mainly in South East Europe and Eastern Mediterranean, Piraeus Bank Group offers a full range of financial products and services to approximately 6mn customers. Total assets of the Group amounted to €86bn, net loans to €52bn and customer deposits to €38bn on September 30, 2015.

5)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Emmanouilidou Maria	Date: 16/10/2015
Company title: Ano-Kato Café		Business Type: Café / jazz café bar
Address: Vamos, Chania, 73008 Crete island, Greece		Facebook page: https://www.facebook.com/%CE%91%CE%9D%CE%A9-%CE%9A%CE%91%CE%A4%CE%A9-CAFE-372737372843233/?fref=ts
Contact person: Kontodimas Dimitrios	Mobile: +30 28254 00208 e-mail: d.kontodimas@gmail.com	GPS location N 3918130 E 517834
Main activity sector: B2B ☐ ☐ B2C B2G ☐		Other activities:
Year of establishment: 2013	Management & ownership: : Kontodimas Dimitrios	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional nationalexporter importer ☐

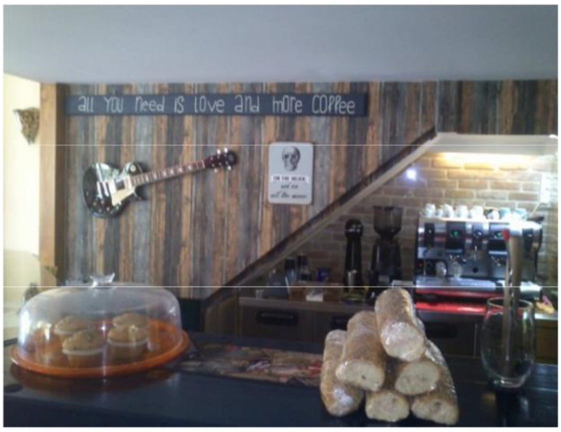
If exporter, main markets: tourists from UK, France, Germany, Scandinavian countries (mostly from early morning for coffee and breakfast until early noon).

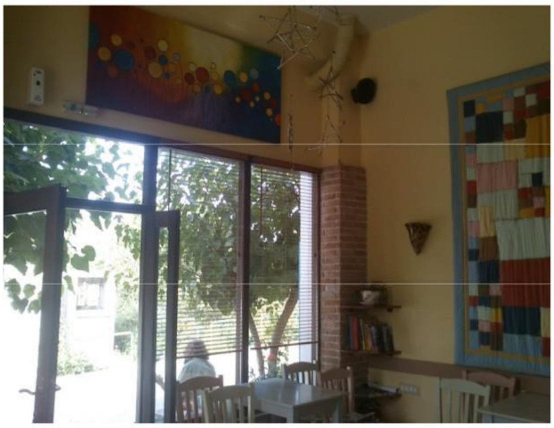
If importer, national origin of main imports:

In Greece, main geographical markets:
Mostly from Athens city.

Short company history/ researcher notes:

Initially, he started the business in partnership with someone else, but now he operates it alone. He took the decision in 2013 to leave Athens, in order to escape from the city, and he came to Vamos village. An important factor for this decision was the meeting with his current wife. He preferred to create a jazz café because he likes to communicate with the people but also because he had a small experience in the field. He has chosen the specific type of café, in order to feel good while he has to work, but also due to his personal aesthetics. His second thought about the specific type of café was that there was not a similar enterprise in the broader region.


all you need is love and more coffee



6)

Study No & title: No. 5 Agro/Rural Tourism

Researcher/s: Emmanouiilidou Maria

Date: 15/10/2015

Company title: Villa Kynthia

Business Type: Accommodation

Address: Panormos, 74052 Rethymno, Crete island, Greece

Website: www.villakynthia.gr

Contact person: Miliaraki Korina

Mobile: +30 6974 920998
e-mail: epimenides.panormo@gmail.com

GPS location
N 3919284
E 562621

Main activity sector:
B2B ☐ B2C☐B2G ☐

Other activities:

Year of establishment:
1991

Management & ownership: Miliaraki Korina (and her brother)

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional national exporter importer ☐

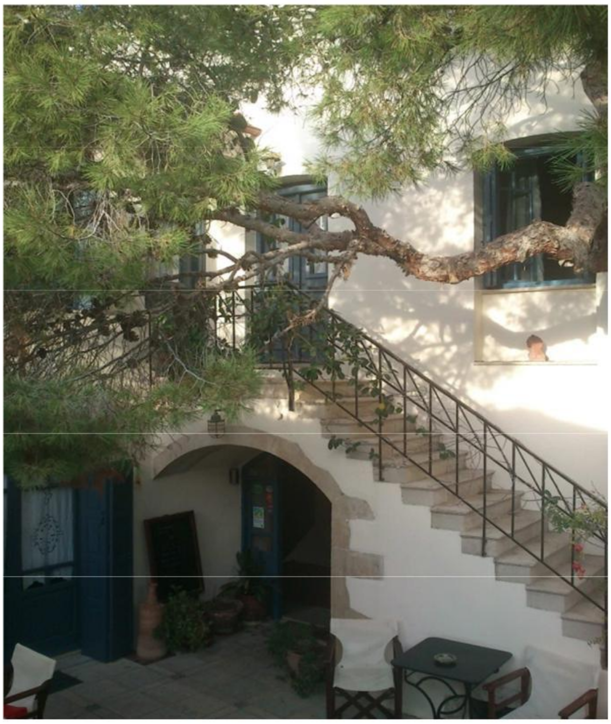
If exporter, main markets:
Mostly tourists from UK and Germany. The hotel has only foreign tourists (no Greek ones).

If importer, national origin of main imports:

In Greece, main geographical markets:

Short company history/ researcher notes:

Corina was in charge of exports in her family business in Heraklion, but she was looking for her personal life balance between the city and the countryside and she found village Panormo, with many abandoned houses and without infrastructure, and she rented a house there. The owners of the house, after few years, decided to sell that house (in order to establish a supermarket), meaning that the new owners would destroy the house and cut down the tree. For that reason, Corina decided to buy the house in order to save it as well as to move her daily life from Heraklion to Panormo. So, the 1st hostel in the village was established while she persuaded the owners of the only tavern of the village to stay open too. And since there was no other way to attract tourists in the village, she decided to visit the international exhibition ITB and after appointments during the exhibition, she managed to enter her enterprise into the list of TUI. At the beginning she worked with "mass tourism" and she actually managed to recoup her investment. By working with small tourism offices from Switzerland and UK, she managed to address to another tourism "segment" and came out of the list of TUI. Then, by using mouth to mouth promotion and with the help of Internet, she managed to consolidate enterprise's customer base and today visitors of the enterprise are only foreign tourists.



7)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Emmanouilidou Maria	Date: 15/10/2015
Company title: Carob Mill Cultural Center (HAROUPOMYLOS)		Business Type: Cultural and Art Centre
Address: Panormos, 74052 Rethymno, Crete island, Greece		Website: www.panormo.com
Contact person: Miliaraki Korina	Mobile: +30 6974 920998 e-mail: epimenides.panormo@gmail.com	GPS location N 3919274 E 562432
Main activity sector: B2B ☐ ☐B2CB2G☐		Other activities:
Year of establishment: 1998	Management & ownership: Miliaraki Korina / Cultural Society of Panormos "EPIMENIDES" (nonprofit)	

Annual turnover:

- o Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10 (**volunteers**)
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional national exporter importer ☐

If exporter, main markets:
Mostly tourists from UK and Germany.

If importer, national origin of main imports:

In Greece, main geographical markets:
Different groups, both from urban centers and rural areas, according to the cultural event (e.g. permaculture seminar: Greek participants; theatre: Greek and foreign).

Short company history/ researcher notes:

HAROUPOMYLOS (The mill of locust beans) was built around 1930 and belongs to the Agricultural Cooperative of Panormos. Here, locust beans, found in abundance in the area, were processed. Some of the processed products were distributed in the Greek market, such as locust bean flour, and others were exported abroad, such as the grains of the locust tree which were necessary for the manufacturing of every kind of film -for photographs or the cinema- as well as the production of cosmetics. A place full of memories for the older generation who lived to see it working, it reminds us of a period with different moral and aesthetic values. HAROUPOMYLOS was characterized as an industrial monument by the Ministry of Culture and has hosted various art events since 1996, although it was almost in ruins. In 1998, it was financed by the Regional Operational Programme (PEP) of Crete with 100 million drachmas. The implementation agent for its restoration and conversion into a Cultural Exhibition and Convention Centre was the Development Organization of Western Crete (OADYK). Moreover, 80 million drachmas have been additionally approved for its equipment by the Special Programme for Local Authorities (EPTA). In effort to contribute to the preservation and enrichment of local cultural tradition as well as introduction to other cultural traditions, Corina and other local people founded 'EPIMENIDES', the cultural society of Panormos, which has jurisdiction over the use of HAROUPOMYLOS as a 'Cultural Exhibition and Convention Centre'.


ΧΑΡΟΥΠΟΜΥΛΟΣ
Χωρος τεχνης & Πολιτισμου
ΕΠΙΜΕΝΙΔΗΣ
Πολιτιστική Εταιρεία Πανόρμου
CAROB-MILL
(HAROUPOMYLOS)
MANAGEMENT
EPIMENIDES


ΣΥΝΑΥΛΙΑ
CONCERT
ΚΟΥΑΡΤΕΤΟ ΕΓΧΟΡΔΩΝ
"Evenos"
"EVENOS" STRING QUARTET
Violin: Ivan Knezevic - Σερβία
Jannis Petrakis (Γιάννης Πετράκης)
Viola: Odysseus Lavaris (Οδυσσέας Λάβαρης)
Cello: Mathieu Jocque - Βέλγιο
Με έργα των: With works of:
N. Σκαλκώτα – N.Skalkotas,
Arvo Pärt, Astor Piazzolla,
F. Mendelssohn, D. Despic
23 ΙΟΥΛΙΟΥ / JULY 21:00
ΤΕΤΑΡΤΗ / WEDNESDAY
ΧΑΡΟΥΠΟΜΥΛΟΣ
ΠΑΝΟΡΜΟ
PANORMO
ΕΠΙΜΕΝΙΔΗΣ

8)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Emmanouilidou Maria	Date: 16/10/2015
Company title: Fabrica Houses & Fabrica Farm		Business Type: Accommodation & Activities
Address: Vamos, Apokoronou, 73008 Chania, Crete island, Greece		Website: www.fabricahouses.gr www.agroculture.gr
Contact person: Frantzeskakis Nikolaos	Mobile: +30 6936 500670 e-mail: info@vamosvillage.gr	GPS location N 3917826 E 518389
Main activity sector: B2B ☐ B2CB2G ☐ ☐		Other activities: cooking lessons; walks in the area; visiting local producers of bread, cheese, olive oil and Cretan food; wine tasting; gathering wild herbs; raki distillation; olive and grape harvest
Year of establishment: 1998	Management & ownership: Frantzeskakis Nikolaos and Frantzeskakis Dimitrios (son) / Frantzeskakis Dimitrios	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional nationalexporter importer ☐

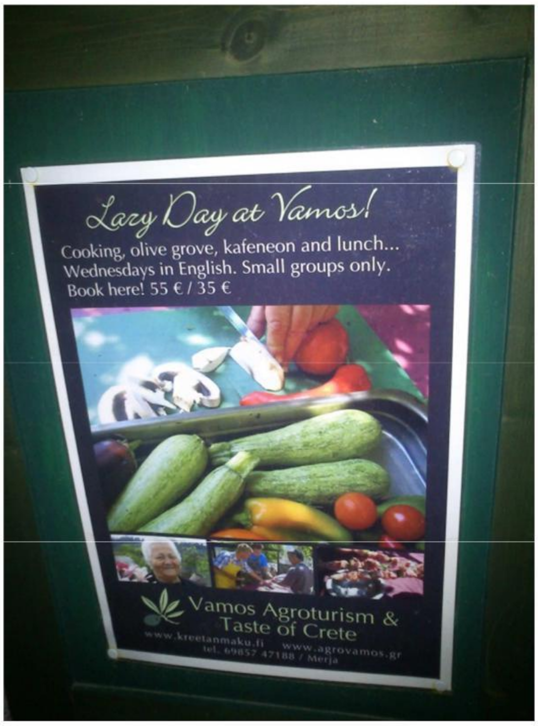
If exporter, main markets:
Tourists from Finland; France; Germany; and UK. Lately, from Netherlands; Israel; Russia; USA.

If importer, national origin of main imports:

In Greece, main geographical markets:
Mostly from Makedonia prefecture and especially from Thessaloniki as well as from Heraklion (Crete).

Short company history/ researcher notes:

The idea started by a group of people (Vamos SA) who returned to the village Vamos, for different reasons (after living in Athens or finished their studies, etc.) in order to develop the village. 5 teachers, 3 unemployed, 1 musician, 1 kindergarten teacher, 1 public officer, 1 doctor, who know each other, started to operate the restaurant in this historic village, which had closed because the owner had died. But the property of the restaurant symbolized important memories from the time that the group members were kids, so they transformed the cafe into a restaurant first of all in order to have a place to gather their friends, to eat and to discuss the evolution of their effort. The idea was embraced by the public since it was promoted enough by the media, mainly because in the building on the opposite site of the tavern, many exhibitions (painting, music evenings; Greek and foreign artists) were hosted. Later, the establishment of hostels and accommodation facilities started, mostly by Vamos SA members, which was responsible for the management and promotion of the area. In 1996 there were 2 hotels; in 1997 there were 5 and currently more than 80, with 300 beds, while 100 more are established in the surrounding villages.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Wednesdays in English. Small groups only.
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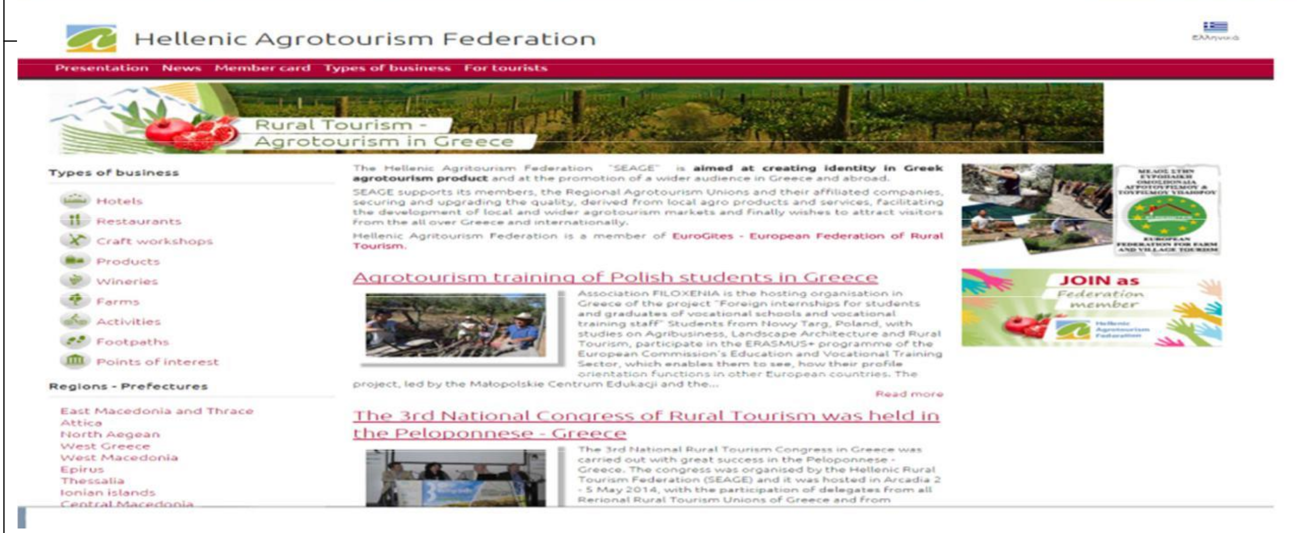
Βάμος | Vamos
Γεύσεις & Φιλοξενία Κρήτης Συν. Π.Ε.
AgroCultural Cretan Coop

9)

Study No & title: 5 Agro/Rural Tourism	Researcher/s: Maria Emmanouilidou	Date: 17/10/2015
Company title: Hellenic Agrotourism Federation – SEAGE		Business Type: non-profit company/federation
Address: Vamos, Apokoronou, 73008 Chania, Crete island, Greece		Website: www.agroxenia.net
Contact person: Nikos Frantzeskakis & Panos Poulos	Mobile: +30 6936 500670 e-mail: info@agroxenia.net	GPS location N E
Main activity sector: B2B B2C B2G		Other activities: joint activities aimed at an overall development of individual agrotourism & ecotourism sites
Year of establishment: 2008	Management & ownership: Nikos Frantzeskakis, President of the Board	
No of employees (TF equivalent): X Up to 10 o 11 – 20 o 21 - 30		o 31 - 40 o 41 – 50 o 51 & over
Level of activity: local/ regionalnational exporter importer In Greece, main geographical markets:		

Short company history/ researcher notes:

The establishment of the Hellenic Agritourism Federation (SEAGE) was a decision of the Regional Agritourism Unions during the meeting of Rural Enterprises, on April 9, 2008 in Crete, in MAICh (Mediterranean Agronomic Institute of Chania). The Hellenic Agrotourism Federation aims to create an identity within the Greek tourism product, and to promote these aims within both the wider audience of Greece and the International community. SEAGE ensures and upgrades the quality derived from local agro products and services; supports the development of local and wider markets. This, in addition, attracts and facilitates visitors from the Greek as well as the International arena within this network of the Regional Agritourism Unions and Agro-business members. The members of SEAGE are the Regional Agritourism Unions of Greece. SEAGE provides its members with the services like the award of special label to those companies meeting with the requirements and specifications of Agritourism in Greece and The raising of awareness amongst the local population and public bodies about the of quality in Agritourism enterprises in the regions.



10)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Emmanouilidou Maria	Date: 17/10/2015
Company title: Kreetan Keittiö ABC		Business Type: Tourism office in Finland
Address: Finland		Website: http://www.kreetanmaku.fi
Contact person: Merja Tuominen-Gialitaki	Mobile: +30 698 0060 933 / +358 50 3888 381 e-mail: merja@kreetanmaku.fi	GPS location N E *(the interview took place in Vamos)*
Main activity sector: B2B ☐ B2C ☐ B2G ☐		Other activities: Website for agro/rural tourism products/packages in Vamos, Crete
Year of establishment: 1996	Management & ownership: Merja Tuominen-Gialitaki	

Annual turnover:

X Up to 200.000	o 601.000 – 800.000
o 201.000 – 400.000	o 801.000 – 1.000.000
o 401.000 – 600.000	o 1.000.001 and over

No of employees (TF equivalent):

X Up to 10	o 31 - 40
o 11 – 20	o 41 - 50
o 21 - 30	o 51 & over

Level of activity: local/ regional ☐ national ☐ exporter ☐ importer ☐

If exporter, main markets:
Finnish tourists (and Scandinavian in general).

If importer, national origin of main imports:

In Greece, main geographical markets:

Short company history/ researcher notes:

In the beginning (1996), she dealt with the publication of books and materials for restaurants concerning the Cretan cuisine. The company changed into a tourist office in 2011. Through the website, she sells tourism products and books for Crete and she is addressing to the Finnish market. The books on the Cretan cuisine made her famous in Finland (she owned 2 restaurants in Finland with Cretan cuisine and she was importing products from Crete, so they called her “Madame Crete”). After shutting down the restaurants due to entrepreneurial mistakes, she continued to write books for Crete and in 2010 she started catering business with Cretan food products, but damage in building that housed the enterprise forced the local Health Service to shut down the company. It was her dream to create a web page for Crete. She came in Crete during March 2011 and she stayed for 1 month, and the last night while she was staying in Rethymno, she woke up and went to Vamos village and she took the phone of Mr. Frantzeskakis (Fabrica Farm) and returned to Crete after 2 weeks. Beginning of June (2011), she returned, as her 2 daughters had gone to study and she was alone, and began to deal with the promotion of alternative tourism in Vamos village. Of course, through her books, she had already promoted Crete and the mainland, as well as the destination of Crete during winter.


www.kreetanmaku.fi/cretan101/
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Kurssit
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Matkat
Kummipuut

11)

Study No & title: 5 Agro/Rural Tourism	Researcher/s: Maria Emmanouilidou	Date: 19/10/2015
Company title: Business and Cultural Development Centre (KEPA)		Business Type: Intermediate Management Agency for National and Community Programs / Private Company
Address: Leda-Maria Block Hermes building, 57001 Thermi, Thessaloniki, Greece		Website: www.e-kepa.gr
Contact person: Kesanidou Galateia	Mobile: +30 2310 480000 e-mail: info@e-kepa.gr	GPS location N 4490654 E 415163
Main activity sector: B2B ☐ B2C ☐ B2G ☐		Other activities:
Year of establishment: 1997	Management & ownership: Nikolaos Efthymiadis, Chairman/President of KEPA's Managing Committee / Federation of Industries of Northern Greece (FING); Greek International Business Association (SEVE); Central and Western Macedonia Chambers of Industry, Commerce and craft Industry; and Western Macedonia Development Company.	
No of employees (TF equivalent): o Up to 10 o 11 – 20 o 21 - 30		o 31 - 40 o 41 - 50 51 & over
Level of activity: local/ regional ☐ national ☐ exporter ☐ importer ☐ In Greece, main geographical markets: Central and Western Macedonia		
Short company history/ researcher notes: It was formed in March 1991 by the Federation of Industries of Northern Greece (FING) and Greek International Business Association (SEVE). Since 1993, KEPA is an Intermediate Management Agency for National and Community Programs at regional and national level. In 1997 KEPA with Central and Western Macedonia Chambers of Industry, Commerce and craft Industry, and Western Macedonia Development Company ANKO formed the Union Development of Macedonia (ANEM) Agency. In November 2002 KEPA and ANEM formed the consortium KEPA-ANEM in order to undertake project management in the context of Operational Programme 'Competitiveness' 2000-2006 (OPC I 2000-2006). Nowadays, KEPA-ANEM is a partner of the Intermediary Managing Agency of Operational Competitiveness Programme "Competitiveness and Entrepreneurship" 2007-2013 (OPCII) that comes under the National Strategic Reference Framework (NSRF) geographically responsible of the regions of Central and Western Macedonia, including the Programme "Alternative Tourism".		

12)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Toufengopoulou Anastasia	Date: 19/10/2015
Company title: Trekking Hellas (Group of Companies)		Business Type: Tour operator, in the sector of outdoor holidays
Address: Dim. Gounari 96Str., 15125 Marousi, Attiki Greece		Website: www.trekking.gr
Contact person: George Benardis Operations Manager	Mobile: +30 210 3310323 e-mail: info@trekking.gr	GPS location N 4211156 E 483175
Main activity sector: B2BB2CB2G		Other activities:
Year of establishment: 1986	Management & ownership: Michael Tsoukias CEO (legal type: Lead Sustainable Development S.A.)	

Annual turnover:

- o Up to 200.000
- o 201.000 - 400.000
- o 401.000 - 600.000
- o 601.000 - 800.000
- o 801.000 - 1.000.000
- X 1.000.001 and over

No of employees (TF equivalent): [1]

- o Up to 10
- o 11 - 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- X 51 & over

Level of activity: local/ regional nationalexporterimporter

If exporter, main markets:

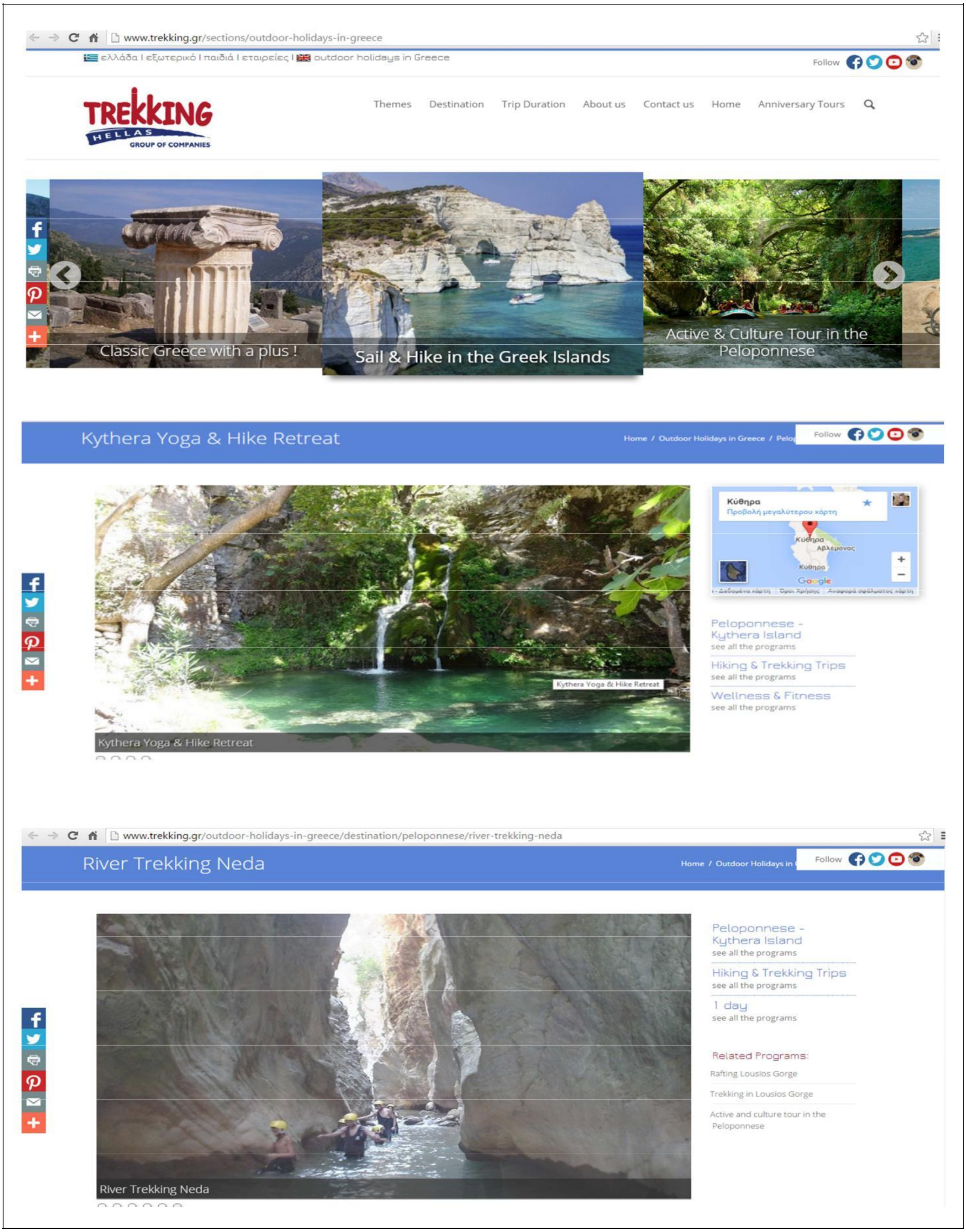
If importer, national origin of main imports:

~~In Greece, main geographical markets:~~
Mostly Athens and Thessaloniki

Short company history/ researcher notes:

Trekking Hellas was founded in 1986, by 2 Greek mountain guides, Michael Tsoukias and Christos Lambris, who decided to give up their occupations and invest in their love for nature and adventure. Trekking Hellas was the first Greek company that specialized in adventure and sports tourism.

(1) Trekking Hellas group consists now of 11 companies and employs more than 70 people all over Greece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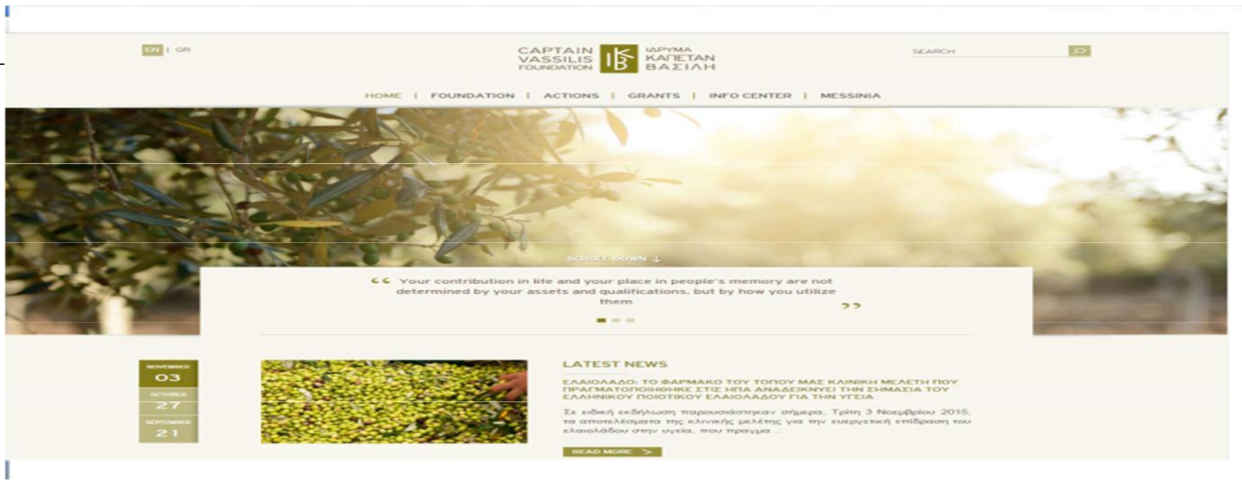
Trekking in Lousios Gorge
Active and culture tour in the Peloponnese
River Trekking Neda

13)

Study No & title: 5 Agro/Rural Tourism	Researcher/s: Maria Emmanouilidou	Date: 20/10/2015
Company title: Central Macedonia Tourism Directorate / Ministry of Tourism / Greek National Tourism Organisation		Business Type: Regional Tourism Organization / Public Authority
Address: 136, Tsimiski Street YMCA New Bulding 54621, Thessaloniki, Greece		Website: www.visitgreece.gr www.mintour.gov.gr
Contact person: Tricha Persephone	Mobile: +30 2310 252170 e-mail: tricha_p@mintour.gr	GPS location N 4497657 E 411124
Main activity sector: B2B B2C B2G		Other activities: Tourism policy and development / business inspection / research / promotion
Year of establishment: 1997	Management & ownership: Ministry of Economy, Development and Tourism / Kountoura Elena (Deputy Minister of Tourism)	
No of employees (TF equivalent): o Up to 10 o 11 - 20 X 21 - 30	o 31 - 40 o 41 - 50 o 51 & over	
Level of activity: local/ regional national ☐ exporter ☐ importer ☐ In Greece, main geographical markets: Central Macedonia		
Short company history/ researcher notes: The Greek National Tourism Organisation (GNTO) is a Public Entity (PE) supervised by the Ministry of Tourism. The GNTO was first established in 1927 and re-established in 1950 by Emergency Act 1565/50, ratified by law 1624/51); in the meantime, tourism fell under the competence of various ministries. Since 1950, the GNTO constitutes the ruling state agency for the tourism sector. According to law 3270/04 (Government Gazette 187/A/11.10.2004), GNTO consists of the Head Office located in Athens and the Regional Departments of Tourism (as of 01.01.2005). The structure of the GNTO's services and the competences of each unit are included in Presidential Decree 343/2001 (Gov. Gazette no 231 A).		

14)

Study No & title: 5 Agro/Rural Tourism	Researcher/s: Maria Emmanouilidou	Date: 22/10/2015
Company title: “Captain Vassilis” Foundation		Business Type: Non-profit private foundation
Address: Pylos-Kalamata National road, Mitikas, 24001, Messinia, Greece		Website: www.cvf.gr
Contact person: Papadatos Dionysis	Mobile: +30 6974 366287 e-mail: dpapadatos@cvf.gr	GPS location N 4086762 E 295669
Main activity sector: B2BB2CB2G ☐ ☐		Other activities: Research; workshops-seminars; plan for sustainable development
Year of establishment: 2011	Management & ownership: Achilleas Constantakopoulos, President of the Board of Directors	
No of employees (TF equivalent): X Up to 10 o 11 – 20 o 21 - 30		o 31 - 40 o 41 – 50 o 51 & over
Level of activity: local/ regionalnational ☐ exporter ☐ importer ☐		
In Greece, main geographical markets: Messinia		
Short company history/ researcher notes: The "Captain Vassilis" Foundation is a non-profit private foundation, founded in 2011 to honor Captain Vassilis Constantakopoulos. Its aim is to establish Messinia as a model for sustainable agricultural development, by supporting and promoting related projects. So far it has supported a series of activities, varying from research on local seed varieties to seminars on local gastronomy and products, as well as the promotion of local products' export. "Captain Vassilis" Foundation supports a wider sense of the Messinian product associating that with sustainability and quality. To achieve that, "Captain Vassilis" Foundation set goals and actions that will leverage the strengths of the region, and will promote the new trends in the rural area of Messinia (e.g. interactive Messinian Diet Food Museum). Also, the foundation provides grants to promote sustainable agricultural development in Messinia.		



15)

<table>
<tr><td>Study No & title: No. 5
Agro/Rural Tourism</td><td>Researcher/s: Emmanouilidou Maria</td><td>Date: 23/10/2015</td></tr>
<tr><td colspan="2">Company title: Explore Messinia</td><td>Business Type:
Alternative Tourism Services</td></tr>
<tr><td colspan="2">Address: 26 Bouloukou Str, Kalamata
Messinia, 24100 Greece</td><td>WEBISTE:
www.exploremessinia.com</td></tr>
<tr><td>Contact person: Kontoargyris Georgios</td><td>Mobile: +30 6971 897640
e-mail:
exploremessinia@gmail.com</td><td>GPS location
N 4101027
E 331675</td></tr>
<tr><td colspan="2">Main activity sector:
B2B B2CB2G
☐ ☐ ☐</td><td>Other activities: Guided Sightseeing,
Sea Kayaking Tours; Guided Hiking Tours; River Trekking; River Rafting with inflatable boats.</td></tr>
<tr><td>Year of establishment: 2014</td><td colspan="2">Management & ownership:
Kontoargyris Georgios + Kontoargyri Katerina (sister) + Kontoargyri Fotis
(cousin) + Kontoargyris Tryfon (cousin) / Kontoargyris Georgios</td></tr>
<tr><td colspan="3">Annual turnover:
X Up to 200.000 — o 601.000 – 800.000
o 201.000 – 400.000 — o 801.000 – 1.000.000
o 401.000 – 600.000 — o 1.000.001 and over</td></tr>
<tr><td colspan="3">No of employees (TF equivalent):
X Up to 10 — o 31 - 40
o 11 – 20 — o 41 - 50
o 21 - 30 — o 51 & over</td></tr>
<tr><td colspan="3">Level of activity: local/ regional nationalexporter ☐ ☐ importer ☐
If exporter, main markets: Scandinavian, Belgium, Northern Europe, UK (foreigners consist 80% of company's clients).</td></tr>
<tr><td colspan="3">If importer, national origin of main imports:</td></tr>
<tr><td colspan="3">In Greece, main geographical markets:
Broader region of Messinia, thematic groups from Athens, and mostly weekends or daily trips (e.g. preference for "active Sundays").</td></tr>
<tr><td colspan="3">Short company history/ researcher notes:
In their place of origin, they discovered a way to make their hobby (alternative tourism activities) with love, by taking advantage their previous experience as guides for other similar companies, as well as the fact that they brought a new sport (sea kayaking) in the region. They create touristic packages of activities, based on their customer needs. This new sport enables the promotion and "exploitation" of several seaside attractions that exist in Messinia (e.g. castles, caves, historical places) but also the protection of the environment (Messinia has several areas characterized as NATURA 2000) and the offer of family friendly activities, including people who have a moderate physical fitness (not so athletic). The objective of Explore Messinia is to offer alternative tourism services to anyone motivated by love for the natural environment seeking a little bit of adventure and action, but also to those looking for just the beneficial contact with nature. The philosophy of the company is interwoven with the principles of ecotourism and operates under the following guidelines:
-Supports and contributes to the protection of the natural environment
-Creates environmental awareness and sensitize visitors to environmental issues -Minimizes negative impacts on the natural environment
-Contributes to education and knowledge of visitors to the local culture, customs and other local traditions.</td></tr>
<tr><td colspan="3"></td></tr>
</table>


ullmoon weekend
ea Kayak & Camping
-5/7/2015
avarino Bay
expl
mess

16)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Emmanouilidou Maria	Date: 23/10/2015
Company title: Art Farm Marini		Business Type: Alternative Tourism Services / Art Farm
Address: Kriskios, Megali Mantineia 24100 Messinia, Greece		Website: www.artfarm.gr (under construction) https://www.facebook.com/agroktima.artfarm/
Contact person: Marinis Sotiris	Mobile: +30 6932 483630 e-mail: agroktima-marini@hotmail.com	GPS location N 4092336 E 337379
Main activity sector: B2B ☐ B2CB2G ☐ ☐		Other activities: Entertainment Events; Creative Events (hospitality of groups/foreign students-ERASMUS+), Cooking lessons, Agrotourism activities
Year of establishment: 2015	Management & ownership: Marinis Sotiris / Marinis and partners CO	

Annual turnover: (1)

- o Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent): (1)

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regionalnational ☐ exporter importer ☐

If exporter, main markets: Poland; Belgium, volunteers from several European countries.

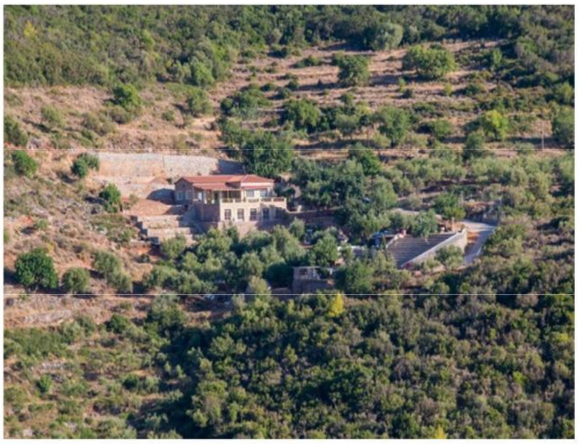
If importer, national origin of main imports:

In Greece, main geographical markets: Athens' citizens and thematic groups (e.g. yoga seminar).

Short company history/ researcher notes:

Sotiris wanted to develop his alternative tourism farm (he don't use the word "enterprise") or better his "cultural farm" away from over-consumption, entertainment, events, creativity, just 500 meters from the village Kriskios. And he was looking for something different, like tree houses tucked among olive trees and teaching how to respect nature and human environment by cultivating and cooking with these products (with the use of a stone oven). He considers "Art Farm" as his 3rd "child", since it is his new project after finished the other two (Duende, a shop with handmade accessories and the Open Theater as well as a small shop with local products in one of the main squares of Kalamata). The "Art Farm" project includes an open theater with 500 seats; a convention center for 120-150 participants; facilities for social events (e.g. weddings); 5 rooms for creating and tasting local products; tree houses; huts made by olive trees for 15-20 persons; and scenes.

(1) Officially, the company will start to operate by the end of the year, so the entrepreneur was not able to provide us with financial statements (annual income). Unofficially, the enterprise occupies from 2 to 8 employees (cooking; farm activities; teachers working with kinds).



17)

Study No & title: 5 Agro/Rural Tourism	Researcher/s: Maria Emmanouilidou	Date: 27/10/2015
Company title: Municipality of Thessaloniki / Department of Tourism & International Relations		Business Type: Public Authority
Address: 1, Vas. Georgiou str., Thessaloniki, 54640 Greece		Website: www.thessaloniki.gr
Contact person: Pengas Spiros	Mobile: +30 2313 317149 e-mail: s.pengas@thessaloniki.gr	GPS location N 4497203 E 411351
Main activity sector: B2BB2C ☐ B2G☐		Other activities:
Year of establishment: 1869	Management & ownership: Boutaris Ioannis, Mayor	
No of employees (TF equivalent): o Up to 10 o 11 – 20 o 21 - 30	o 31 - 40 o 41 - 50 51 & over	
Level of activity: local/ regionalnational	☐exporter ☐ importer	
In Greece, main geographical Markets: Thessaloniki		

Short company history/ researcher notes:

The Municipality of Thessaloniki was founded in 1869, one year after the foundation of the Municipality of Istanbul. The first mayor of the city was the Ottoman Suleiman Sundi. The first Greek mayor of Thessaloniki was Konstantinos Angelakis while the current mayor is Yiannis Boutaris, who is in office since 2010. The Municipality of Thessaloniki is the second largest municipality by population in Greece after the Municipality of Athens. According to the 2011 Greek census, it has a population of 324,766 inhabitants. The municipality includes the main area of the city of Thessaloniki, the historical centre (including the majority of city's monuments) and the regions around it. Municipality of Thessaloniki owns one television channel (TV 100) and three radio stations (FM 100, FM 100,6 και FM 101). The Municipality of Thessaloniki owns the management of several culture sites. The Municipal Art Gallery, the Municipal Theatre Aneton, the History Center of Thessaloniki, Vafopouleion, the Culture Centre of Western Thessaloniki, Alaca Imaret, Yeni Cami, Villa Petridi and also several local libraries are under the administration of the municipality.

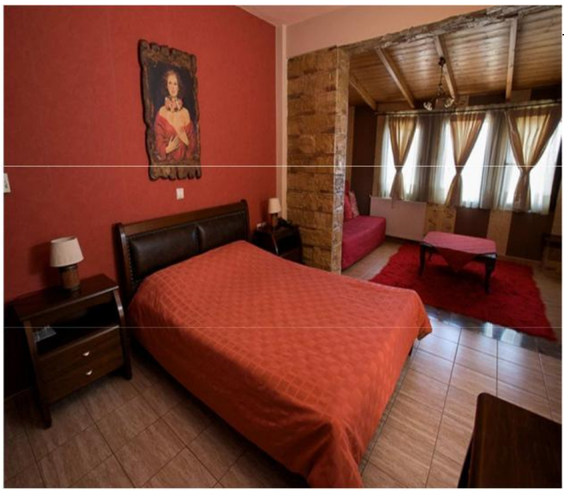
THESSALONIKI Food Festival

18)

<table>
<tr><td>Study No & title: No. 5
Agro/Rural Tourism</td><td>Researcher/s:
Emmanouilidou Maria</td><td>Date: 27/10/2015</td></tr>
<tr><td colspan="2">Company title: Chatzivariti Estate</td><td>Business Type:
Estate (Vineyard & Winery)</td></tr>
<tr><td colspan="2">Address: 6th Km of Goumenissa-Kilkis Road, 61300, Goumenissa, Kilkis, Greece</td><td>Website:
www.chatzivaritis.gr</td></tr>
<tr><td>Contact person: Chatzivaritis Evaggelos & Iakovidou Olga</td><td>Mobile: +30 6972 200102 (winery manager)
e-mail: info@chatzivaritis.gr</td><td>GPS location
N 4527311
E 371550</td></tr>
<tr><td colspan="2">Main activity sector:
B2B ☐ B2C ☐ B2G ☐</td><td>Other activities:
organized visits and events (e.g. European Day of Winetourism)</td></tr>
<tr><td>Year of establishment: 2007</td><td colspan="2">Management & ownership:
Ampelourgiki-Oinopoiitiki-Agrotouristiki Chatzivaritis S.A.</td></tr>
<tr><td colspan="3">Annual turnover:
X Up to 200.000   o 601.000 – 800.000
o 201.000 – 400.000   o 801.000 – 1.000.000
o 401.000 – 600.000   o 1.000.001 and over</td></tr>
<tr><td colspan="3">No of employees (TF equivalent):
X Up to 10   o 31 - 40
o 11 – 20   o 41 - 50
o 21 - 30   o 51 & over</td></tr>
<tr><td colspan="3">Level of activity: local/ regional nationalexporterimporter ☐</td></tr>
<tr><td colspan="3">If exporter, main markets:
USA, Canada, Germany, UK, and Belgium (for wine exports)</td></tr>
<tr><td colspan="3">If importer, national origin of main imports:</td></tr>
<tr><td colspan="3">In Greece, main geographical markets:
Athens, Thessaloniki, islands, and from other smaller Greek cities (Komotini, Xanthi, Trikala, Larissa)</td></tr>
<tr><td colspan="3">Short company history/ researcher notes:
It all started with love when Vaggelis Chatzivaritis met his soon to be wife Olga Iakovidou in 1981. She was from Goumenissa, a place with a long tradition in winemaking. Little did he know that this was the place where he would, later on in life, dedicate himself into the creation of a very unique and widely undiscovered Greek wine. Being a wine lover himself, and a man who also appreciated fine food and the simple pleasures of life, he started making his own wine to enjoy with the company of his good friends and close relatives. For Vaggelis, wine making was simply a hobby and time-out from his demanding career as a mechanical engineer. In 1994 he planted the first 50 acres vineyard in Bindabla area. Expansion of the vineyard was inevitable and it was done gradually in the area of Filyria. Today the vineyard of Domaine Chatzivariti consists of 120 acres. Emphasizing the quality of the grapes, soil fertility and environmental protection organic farming was chosen. Chatzivaristis estate focuses on the Greek varieties of Xinomavro, Negoska, Roditis and Assyrtico, and also cultures the popular Sauvignon Blanc, Merlot, Chardonnay and Cabernet Sauvignon in smaller surfaces. In 2007, a wonderful “boutique” winery was built in the vineyard of Filyria. Local storytelling says that the indigenous Greek varieties of the Xinomavro and the Negroska from which the P.D.O. Goumenissa Chatzivaritis is produced, was the wine of choice of Philip, the King of Macedonia, father of Alexander the Great. Further to this, legend also has it that great quantities of wine from the region were transferred during the 1st World War to France because it was so exquisite.</td></tr>
<tr><td colspan="3"></td></tr>
</table>

19)

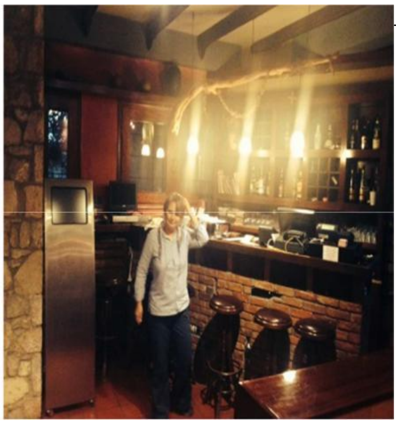
<table>
<tr><td>Study No & title: No. 5
Agro/Rural Tourism</td><td>Researcher/s: Toufengopoulou
Anastasia</td><td>Date: 29/10/2015</td></tr>
<tr><td colspan="2">Company title: Oreiades Suites</td><td>Business Type:
Traditional Guesthouse</td></tr>
<tr><td colspan="2">Address: Koutsodimos village, Kryoneri (lake Plastira), 43067 Karditsa Greece</td><td>Website:
www.limni-plastira.gr</td></tr>
<tr><td>Contact person:
Palmou Eleni</td><td>Mobile: +30 6944 399541
e-mail: : info@oreiades-resort.gr</td><td>GPS location
N 4354896
E 301671</td></tr>
<tr><td colspan="2">Main activity sector:
B2B ☐ B2CB2G ☐ ☐</td><td>Other activities:</td></tr>
<tr><td>Year of establishment:
2006</td><td colspan="2">Management & ownership:
Palmos Dimitrios</td></tr>
<tr><td colspan="3">Annual turnover:
X Up to 200.000
o 201.000 – 400.000
o 401.000 – 600.000
o 601.000 – 800.000
o 801.000 – 1.000.000
o 1.000.001 and over</td></tr>
<tr><td colspan="3">No of employees (TF equivalent):
X Up to 10
o 11 – 20
o 21 - 30
o 31 - 40
o 41 - 50
o 51 & over</td></tr>
<tr><td colspan="3">Level of activity: local/ regional nationalexporter ☐ importer ☐</td></tr>
<tr><td colspan="3">If exporter, main markets:</td></tr>
<tr><td colspan="3">If importer, national origin of main imports:</td></tr>
<tr><td colspan="3">In Greece, main geographical markets:
Mostly from the cities of Athens and Thessaloniki.
Short company history/ researcher notes:</td></tr>
<tr><td colspan="3">“Suites Oreiades”, have been constructed with artistry and taste by two young people who left the life in the city to live in a peaceful and quiet environment and that is the exact experience that they want to share with their visitors.</td></tr>
</table>



20)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Toufengopoulou Anastasia	Date: 29/10/2015
Company title: Fagopoti		Business Type: Traditional gourmet restaurant
Address: Kalivia Pezoulas (lake Plastira), 43067 Karditsa Greece		Webiste: www.fagotopi.gr
Contact person: Xenia Psifi	Mobile: +30 24410 92998 e-mail: info@fagopoti.gr	GPS location N 4353350 E 302750
Main activity sector: B2B ☐ B2CB2G ☐ ☐		Other activities:
Year of establishment: 2000	Management & ownership: Polyxeni (Xenia) & Stergios Psifis (legal type: GP Company)	
Annual turnover: X Up to 200.000 o 201.000 – 400.000 o 401.000 – 600.000	o 601.000 – 800.000 o 801.000 – 1.000.000 o 1.000.001 and over	
No of employees (TF equivalent): X Up to 10 o 11 – 20 o 21 - 30	o 31 - 40 o 41 - 50 o 51 & over	
Level of activity: local/ regional nationalexporter ☐importer ☐		
If exporter, main markets:		
If importer, national origin of main imports:		
In Greece, main geographical markets: Mostly from the cities of Athens and Thessaloniki		
Short company history/ researcher notes:		
From the area lacked a more "sophisticated" restaurant. They are implementing and enhancing the local gastronomy, which until recently any restaurant did not offer.		





21)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Toufengopoulou Anastasia	Date: 28/10/2015
Company title: Aiolides- Plastiras Lake		Business Type: Traditional Guesthouse
Address: Kalivia Pezoulas (lake Plastira), 43067 Karditsa Greece		Webiste: www.aiolides.gr
Contact person: Zevgara Georgia	Mobile: +30 6947 007342 e-mail: aiolides@yahoo.gr	GPS location N 4353173 E 303034
Main activity sector: B2B ☐ B2CB2G ☐ ☐		Other activities: facilities for conferences and social events
Year of establishment: 2005	Management & ownership: Georgia Zevgara (legal type: SA Company)	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional nationalexporter ☐importer ☐

If exporter, main markets:

If importer, national origin of main imports:

In Greece, main geographical markets:

Athens, Thessaloniki and mainly nowadays, due to the financial crisis, the main market is tourists/ visitors from Thessaly.

Short company history/ researcher notes:

The company was founded by Georgia's father. His origin is from the area of Plastiras lake and because he liked the area wanted to take action there. So he founded the company more than inner need without prior a business plan.

22)

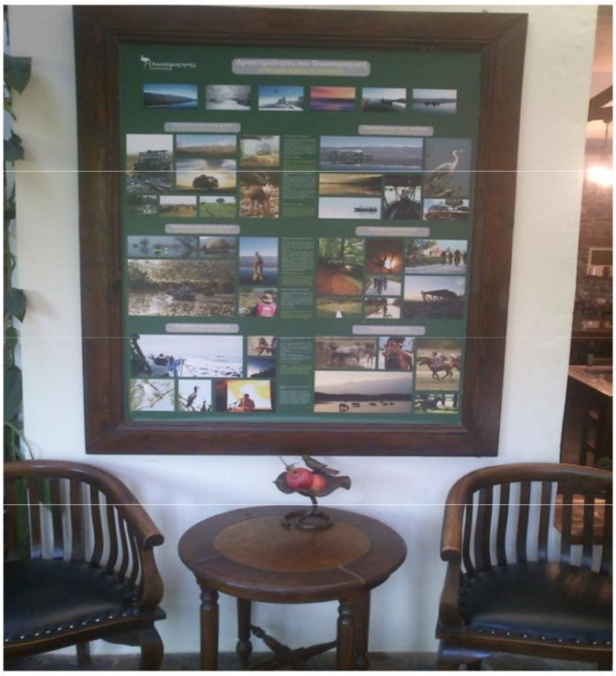
<table>
<tr><td>Study No & title: No. 5
Agro/Rural Tourism</td><td>Researcher/s:
Vlachou Charisia & Emmanouilidou Maria</td><td>Date: 29/10/2015</td></tr>
<tr><td colspan="2">Company title: Oikoperiigitis</td><td>Business Type:
Accommodation & Restaurant & Activities</td></tr>
<tr><td colspan="2">Address: Kerkini Lake Serres 620 55 Greece</td><td>Website:
www.oikoperiigitis.gr</td></tr>
<tr><td>Contact person: Reklos Ioannis</td><td>Mobile: +30 6947 152240
e-mail: info@oikoperiigitis.gr</td><td>GPS location
N 4562804
E 423438</td></tr>
<tr><td colspan="2">Main activity sector:
B2B ☐ B2CB2G ☐ ☐</td><td>Other activities:
Camping; Birdwatching; Trekking - Hiking; 4x4 Tour; Canoe Tour; Bike Tour; Environmental Programs for School and Groups</td></tr>
<tr><td>Year of establishment: 1995</td><td colspan="2">Management & ownership:
Reklos Ioannis</td></tr>
<tr><td colspan="3">Annual turnover:
o Up to 200.000   o 601.000 – 800.000
X 201.000 – 400.000   o 801.000 – 1.000.000
o 401.000 – 600.000   o 1.000.001 and over</td></tr>
<tr><td colspan="3">No of employees (TF equivalent):
X Up to 10   o 31 - 40
o 11 – 20   o 41 - 50
o 21 - 30   o 51 & over</td></tr>
<tr><td colspan="3">Level of activity: local/ regional nationalexporter importer ☐</td></tr>
<tr><td colspan="3">If exporter, main markets:
UK (birdwatchers), Belgium (mostly the ones that visit Chalkidiki), Netherlands, Germany, Switzerland, Italy, France

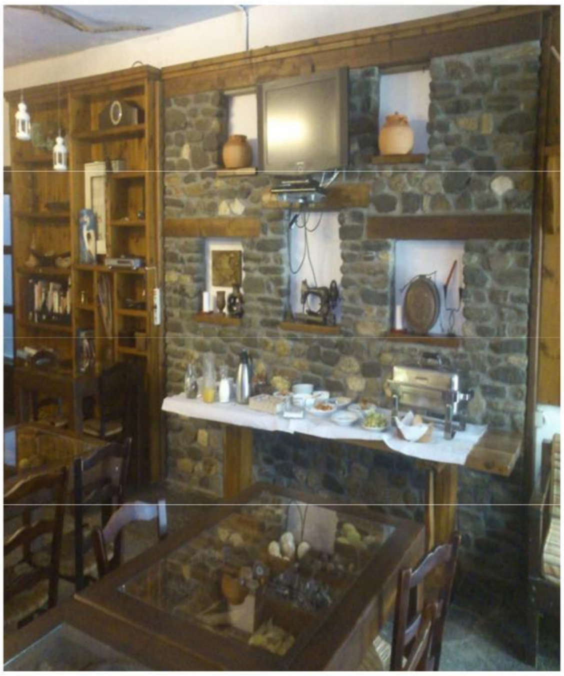
If importer, national origin of main imports:</td></tr>
<tr><td colspan="3">
In Greece, main geographical Markets:</td></tr>
<tr><td colspan="3">90% mostly from Northern Greece, during economic crisis (Thessaloniki, Kavala, Evros), mostly for 4 days. From Athens, during Christmas vacations and national holidays and since they have to travel more kilometres, they spend 6 days in region of Kerkini.

Short company history/ researcher notes:
The "Tour and Ecology Center Kerkini -Mpelles-" known as "Oikoperiigitis" is a private initiative to</td></tr>
<tr><td colspan="3">develop environmental awareness through activities, accommodation and hospitality taking place in the ecological park of lake Kerkini (Northern Serres). The hotel can accommodate 60 people, schools, associations, individuals, in two establishments in the village Kerkini, in rooms equipped with heating and fireplace. Activities in the lake Kerkini, such as road tour, tour in lake by canoe or boat, mobile camp for children, and many others are supported by modern equipment and drivers/instructors. And all started and supported by Mr. Reklos' love for nature and the environment and his will to meet visitors and safely guide them in the Kerkini wetland. Oikoperiigitis has developed environmental awareness programs for schools and clubs as well as ecotourism and agritourism tours for both individuals and organizations and companies.</td></tr>
<tr><td colspan="3"></td></tr>
</table>


ΟΙΚΟΠΕΡΙΗΓΗΤΗΣ
ΞΕΝΩΝΑΣ
ΕΣΤΙΑΤΟΡΙΟ
ΚΑΦΕ
ΠΕΡΙΗΓΗΣΕΙΣ


Οικοπεριηγητής





23)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Vlachou Charisia & Emmanouilidou Maria	Date: 29/10/2015
Company title: Pestrofes		Business Type: Restaurant
Address: Ano Poroia Serres 620 55 Greece		Website: www.pestrofes.gr
Contact person: Theodorakelis George	Mobile: +30 6978 896910 e-mail: info@pestrofes.gr	GPS location N 4571770 E 419290
Main activity sector: B2B ☐ B2C ☐ B2G ☐		Other activities: Hospitality of social events
Year of establishment: 1987 (by their father)	Management & ownership: : Isidora Theodorakeli and partners CO / for management, Theodorakelis George and 2 ladies are responsible (George's wife and George's sister)	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional national exporter importer ☐

If exporter, main markets:
Very few groups, mostly from UK and Germany.

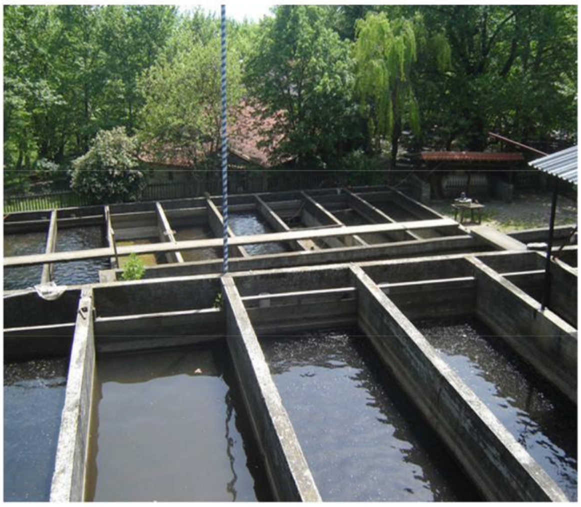
If importer, national origin of main imports:

In Greece, main geographical markets:

Mostly from Greek cities (Thessaloniki, Serres, Kilkis) and from Athens, during Christmas vacations and national holidays.

Short company history/ researcher notes:

In 1980 Dimitris Theodorakelis (father) decided to return with his family from Germany to his place of origin and deal with trout breeding. And the place of Ano Poroia with the gurgling waters was the most appropriate one. The task was difficult, as there was no previous experience; however he manages to operate the enterprise in 1981. The restaurant started derived by the need to sell the trout he was breeding through catering services, as the trout farm was not competitive by itself and it could not survive in the market, so the idea of a trout-restaurant suited best for this purpose. By 2008, that the father passed away, his 2 kids (owner and her bother) took control of the enterprise (both farm and restaurant), while they are supported by their husband and wife respectively.



24)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Vlachou Charisia & Emmanouilidou Maria	Date: 29/10/2015
Company title: Viglatoras		Business Type: Accommodation
Address: Ano Poroia, Serres 620 55 Greece		Website: www.viglatoras.gr
Contact person: Kallesis Stergios	Mobile: +30 6944 455234 e-mail: info@viglatorashotel.com	GPS location N 4570663 E 419011
Main activity sector: B2B ☐ B2CB2G ☐ ☐		Other activities:
Year of establishment: 2001	Management & ownership: Kallesis Stergios	

Annual turnover:

- X Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- o 1.000.001 and over

No of employees (TF equivalent):

- X Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- o 41 - 50
- o 51 & over

Level of activity: local/ regional nationalexporter importer ☐

If exporter, main markets:

UK and Belgium (birdwatchers), who now that they are able to eat homemade food in the enterprise, they usually stay up to 7 days (7 out of 100 visitors are women)

If importer, national origin of main imports:

In Greece, main geographical markets:

90% mostly from Northern Greece (Thessaloniki, Ioannina). From Athens, during Christmas vacations and national holidays, since they have to travel more kilometers.

Short company history/ researcher notes:

The company began in 2001 with 6 apartments and in 2005 another 2 apartments were added. Particular emphasis is given on homemade breakfast with products from the family farm and since 2011 the company is able to serve dinner and meals to small groups.

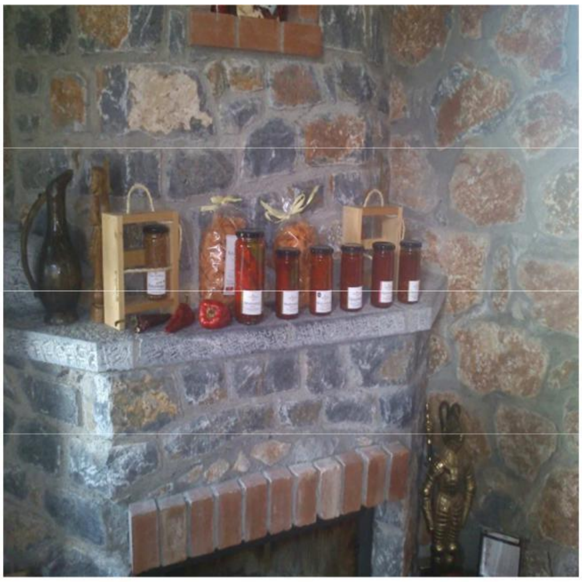
25)

<table>
<tr><td>Study No & title: No. 5
Agro/Rural Tourism</td><td>Researcher/s: Vlachou Charisia & Emmanouilidou Maria</td><td>Date: 30/10/2015</td></tr>
<tr><td colspan="2">Company title: Naoumidis Peppers & Naoumidis Restaurant</td><td>Business Type: Farm / Process Factory / Restaurant / Culinary Museum</td></tr>
<tr><td colspan="2">Address: Agios Panteleimonas, Florina, 53200 Greece</td><td>Website:
www.piperiesflorinis.gr &
http://naoumidis.gr</td></tr>
<tr><td>Contact person:
Naoumidis Petros</td><td>Mobile: +30 6947 020454
e-mail:
piperiesflorinis@gmail.com
naoumidis@gmail.com</td><td>GPS location
Farm:
N 4511041
E 309007
Museum/restaurant:
N 309975
E 4510477
Restaurant no.2:
N 309709
E 4509896</td></tr>
<tr><td colspan="2">Main activity sector:
B2BB2C ☐ ☐B2G ☐</td><td>Other activities:
organized visits and social events</td></tr>
<tr><td>Year of establishment:
1972 (restaurant)
1985 (restaurant & museum)
2008 (process factory)</td><td colspan="2">Management & ownership:
Naoumidis Petros</td></tr>
<tr><td colspan="3">Annual turnover:
o Up to 200.000 — o 601.000 – 800.000
o 201.000 – 400.000 — o 801.000 – 1.000.000
X 401.000 – 600.000 — o 1.000.001 and over</td></tr>
<tr><td colspan="3">No of employees (TF equivalent):
o Up to 10 — o 31 – 40
X 11 – 20 — o 41 - 50
o 21 - 30 — o 51 & over</td></tr>
<tr><td colspan="3">Level of activity: local/ regional nationalexporterimporter ☐</td></tr>
<tr><td colspan="3">If exporter, main markets:
Europe (Italy, France, Belgium, Netherlands, and UK) & USA (New York, Chicago).

If importer, national origin of main imports:</td></tr>
<tr><td colspan="3">In Greece, main geographical markets:</td></tr>
<tr><td colspan="3">Whole country in deli shops.

Short company history/ researcher notes:</td></tr>
<tr><td colspan="3">From garden of 5ha. The farm grow up to a farm of 50ha. following specific standards, as the consumption had begun to increase. Naoumidis family having in mind the promotion of original Florina pepper, produces handmade innovative products, based on the rep pepper, and by using exclusively local varieties of red pepper. Initially, the family was operating the 1st restaurant which is established next to Vegoritida lake and since the demand was increasing, as well as the family members, the family started a second restaurant just a few meters away for the first one, but “enriched” with a culinary museum based on the food that they used to keep in cellars for the long winter (died vegetables, sun-dried fish, pork preserved in the other aged wines). Finally, in 2008, the family established the processing factory of red peppers, in a facility which has the opportunity to accept visitors, in order to supply the restaurants with</td></tr>
<tr><td colspan="3"></td></tr>
</table>

products, while in order to ensure the quality and authenticity of the products, the enterprise retains the seeds from previous seasons.



26)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Vlachou Charisia & Emmanouilidou Maria	Date: 30/10/2015
Company title: Alpha Estate		Business Type: Estate (Vineyard & Winery)
Address: 2nd km Amyndeo – Agios Panteleimonas, Florina, 53200 Greece		Webiste: www.alpha-estate.com
Contact person: Iatridis Aggelo s	Mobile: +30 23860 20111 e-mail: info@alpha-estate.com	GPS location N 4507090 E 306069
Main activity sector: B2BB2C B2G		Other activities: organized visits and events (e.g. European Day of Winetourism)
Year of establishment: 1987	Management & ownership: Mavridis Makis & Iatridis Aggelos	

Annual turnover: (1)

- o Up to 200.000
- o 201.000 – 400.000
- o 401.000 – 600.000
- o 601.000 – 800.000
- o 801.000 – 1.000.000
- X 1.000.001 and over

No of employees (TF equivalent):

- o Up to 10
- o 11 – 20
- o 21 - 30
- o 31 - 40
- X 41 - 50
- o 51 & over

Level of activity: local/ regionalnationalexporterimporter

If exporter, main markets:

Germany, Cyprus, Belgium, Netherlands, Russia, Belarus, Canada, USA, Japan, China, Australia, and Switzerland (for wine exports).
Visitors: 80% Greek and 20% Foreign tourists.

If importer, national origin of main imports:

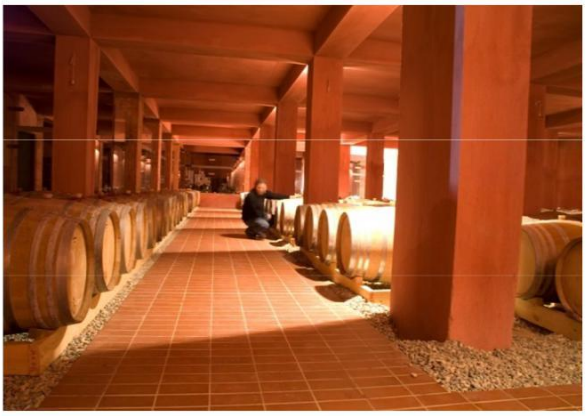
In Greece, main geographical markets:
Athens, Aegean islands, prefecture of Makedonia.

Short company history/ researcher notes:

ALPHA ESTATE is located at the northwest part of Greece, the Amyndeon, Florina region. Alpha Estate was founded in 1997 by the experienced viticulturist Makis Mavridis and chemist-oenologist Angelos Iatridis, who, after years of experience in various locations of Greece, chose the Amyndeon region to create his own wine. The wedding of an ancient local variety with a noble international one arose not only by the demands of modern markets, but also by the spirit of progress that distinguishes Angelos Iatridis' winemaking. Alpha Estate's vineyard consists of the following varieties: Xinomavro, Mavrodapnhe, Syrah, Merlot, Pinot Noir, Tannat, Montepulciano, Negro Amaro, Barbera, Malagouzia, Sauvigon Blanc, and Chardonnay & Gewürztraminer.

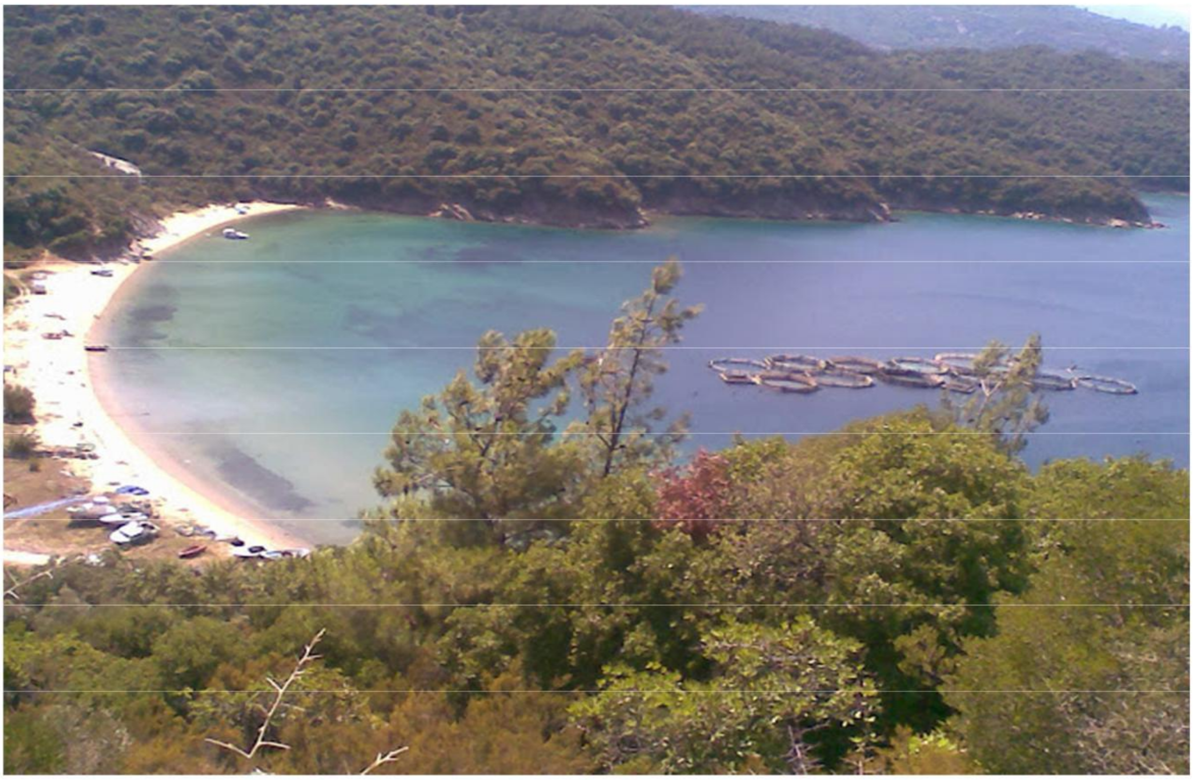
(1) 150.000.00€ through sales during touristic visits in winery.


ALPHA
ESTATE
WINE



27)

Study No & title: No. 5 Agro/Rural Tourism	Researcher/s: Emmanouilidou Maria	Date: 17/11/2015
Company title: Aquaculture Olympiados		Business Type: Aquaculture Farm
Address: Marmari cape, Olympiada, Chalkidiki, 57014, Greece		Website: N/A
Contact person: Georgiadis Sotirios	Mobile: +30 6977 206511 e-mail: papagiosfish@gmail.com	GPS location N 4488904 E 489871
Main activity sector: B2BB2C ☐ ☐ B2G☐		Other activities:
Year of establishment: 2008	Management & ownership: Georgiadis Sotirios / Nikou Maria – Mallios Vasileios & CO	
Annual turnover: o Up to 200.000 o 201.000 – 400.000 X 401.000 – 600.000	o 601.000 – 800.000 o 801.000 – 1.000.000 o 1.000.001 and over	
No of employees (TF equivalent): X Up to 10 o 11 – 20 o 21 - 30	o 31 - 40 o 41 - 50 o 51 & over	
Level of activity: local/ regionalnational ☐ exporter ☐ importer☐ If exporter, main markets:		
If importer, national origin of main imports:		
In Greece, main geographical markets: The farm distributes its products through another company (wholesaler) that Mr. Georgiadis operates in Michaniona.		
Short company history/ researcher notes: The initial company existed since 1980, but the owner got retired and sold the company to its current owners (Nikou Maria – Mallios Vasileios & CO) (basically, the deal involved the acquisition of the permission to use the specific site/place). The nowadays owners moved on to modernize the facilities of the company. The idea for this enterprise came up due to the fact that Mr. Georgiadis was already active in the wholesale sector in Michaniona, Thessaloniki and thus the interest in expanding his activities to the sector of aquaculture industry was born.		



9. Appendix 4: Business plans

a. Business/Financial plan for horseback riding (leisure activities)

The specific business/financial plan refers to a horseback riding facility which will provide horse boarding, horse training, and riding instruction services as leisure activities.

The horseback riding will be located at a mountainous village, 20km from the city of Thessaloniki and in the horse stable, 5 boarder horses are plan to taken. The property consists of 17.000 square meters. The facilities will include a 600 square meters horse stable, an outdoor lighted arena (dimensions 60X30 meters), and a parking space while the necessary infrastructure also includes roadworks in the property and fence of the arena.

- Startup costs

1. Facility and Buildings

This category of startup costs include the expenses related to facilities and buildings of the horseback riding such as design and construction of buildings and needed infrastructure. On average, the total cost of the design and construction is estimated as follows:

Table 1: Indicative Design/Construction cost for a small horseback riding business

No	Description	Expense (in €)
1	Fence of arena	4.000,00
2	Road network in the property	1.500,00
3	Construction of outdoor arena	55.105,00
4	Electrical Installation (lighting arena)	15.887,00
5	Plant and irrigation system installation	1.881,90
6	Construction of horse stable	50.000,00
7	Permits and Licenses	4.320,00
Total Expense		132.693,90

2. Equipment

The costs of the necessary equipment for the delivery of horseback riding leisure activities include the purchase of livestock, horse caring equipment and riders' safety equipment. On average, the total cost of the necessary equipment is estimated as follows:

Table 2: Indicative Equipment cost for a small horseback riding business

No	Description	Expense (in €)
1	Purchase of 5 horses	15.000,00
2	Purchase of horse caring equipment (blankets, brushes, etc.)	577,00
3	Purchase of riders' safety equipment	10.077,00
4	Purchase of equipment for preparing coffee and sandwiches	6.224,20
5	Purchase of leisure and communication equipment (e.g. TV; notebook)	2.600,00
Total Expense		34.478,20

Total expense of investment for a small horseback riding business:

132.693,90€ + 34.478,20€ = 167.172,10€

- Sales of goods/services and business revenue analysis

The product/service portfolio of a small horseback riding can be divided into three broad categories: stabling services, recreational services, and education services. The table below exhibit sales projection for each product sold for the first five years of its operation.

Sales projections were based on the following assumptions:

a) 20 people per day for equestrian tour for 100 days
b) 15 people per day for training for 100 days
c) 30 people per day for coffee for 100 days

Table 3: Sales of goods/services for a small horseback riding business

Category of products/services	Unit	1st year	2nd year	3rd year	4th year	5th year
Equestrian Navigation services	persons	2.000,00	2.100,00	2.205,00	2.315,25	2.431,01
Riding education services	persons	1.500,00	1.575,00	1.653,75	1.736,44	1.823,26
Horse stabling	persons	20,00	20,00	20,00	20,00	20,00
Horse training services	persons	10,00	10,00	10,00	10,00	10,00
Coffee/beverages	persons	3.000,00	3.150,00	3.307,50	3.472,88	3.646,52

Table 4: Business revenue analysis (turnover) for a small horseback riding business (in €)

Category of products/services	Unit price	1st year	2nd year	3rd year	4th year	5th year
Equestrian Navigation services	15,00	12.000,00	12.600,00	13.230,00	13.891,50	14.586,08
Riding education services	500,00	8.000,00	8.400,00	8.820,00	9.261,00	9.724,05
Horse stabling	350,00	42.000,00	44.100,00	46.305,00	48.620,25	51.051,26
Horse training services	20,00	40.000,00	42.000,00	44.100,00	46.305,00	48.620,25
Coffee/beverages	5,00	20.000,00	21.000,00	22.050,00	23.152,50	24.310,13
Total Revenue		122.000,00	128.100,00	134.505,00	141.230,25	148.291,76

- Operation expenses

In this category are included expenses such as the cost for personnel/staff, raw materials, and overhead expenses. The table below depicts some of the most frequent operation expenses on average:

Table 5: Cost of personnel/staff during the 1st operating year for a small horseback riding business (in €)

No	Job description	Months	Cost per month	Annual cost
1	Stableman	12	1.000,00	12.000,00
2	Services assistant	12	1.000,00	12.000,00
	Total Cost			24.000,00

Table 6: Cost analysis – raw and auxiliary material s for a small horseback riding business (in €)

Category of cost	Unit price	1st year	2nd year	3rd year	4th year	5th year
Horse feeding	1.000,00	12.000,00	12.600,00	13.230,00	13.891,50	14.586,08
Refreshments expenses	3.000,00	36.000,00	37.800,00	39.690,00	41.674,50	43.758,23
Total Cost		48.000,00	50.400,00	52.920,00	55.566,00	58.344,30

Table 7: Business expenses for a small horseback riding business (in €)

Category of expense	1st year	2nd year	3rd year	4th year	5th year
1. Staff costs (fees and charges)	24.000,00	24.000,00	24.000,00	24.000,00	24.000,00
2. Raw material costs and cost of services offered	48.000,00	50.400,00	52.920,00	55.566,00	58.344,30
Raw material	48.000,00	50.400,00	52.920,00	55.566,00	58.344,30
3. Overheads	5.960,00	6.658,00	7.390,90	8.160,45	8.968,47
Facilities (electricity, etc.)	1.000,00	1.050,00	1.102,50	1.157,63	1.215,51
Maintenance costs	1.000,00	1.050,00	1.102,50	1.157,63	1.215,51
Taxes - Fees	1260	1.723,00	2.209,15	2.719,61	3.255,59
Printed Forms & Stationery	200,00	210,00	220,50	231,53	243,10
Cleaning Materials, Clothing	500,00	525,00	551,25	578,81	607,75
Other expenses	1.000,00	1.050,00	1.102,50	1.157,63	1.215,51
Other consumables	500,00	525,00	551,25	578,81	607,75
Rents					
Veterinarian - farrier	500,00	525,00	551,25	578,81	607,75
4. Advertising and Promotion Costs					
Total Business Expenses	77.960,00	81.058,00	84.310,90	87.726,45	91.312,77

- Operating income and results

Table 8: Operating income and results for a small horseback riding business (in €)

Results	1st year	2nd year	3rd year	4th year	5th year
Total Revenue	122.000,00	128.100,00	134.505,00	141.230,25	148.291,76
Total Expenses	77.960,00	81.058,00	84.310,90	87.726,45	91.312,77
Earnings before Interest, Tax, Depreciation, and Amortization	44.040,00	47.042,00	50.194,10	53.503,81	56.979,00
Less :					
Interest of long / term loans					
Interest on short / term loans					
Earnings before Tax	44.040,00	47.042,00	50.194,10	53.503,81	56.979,00
Less retained earnings income tax	8.808,00	9,408,40	10.038,82	10.700,76	11.395,80
Net Result	35.232,00	37.633,60	40.155,28	42.803,05	45.583,20

Table 9: Present value at discount rate 5% annually for a small horseback riding business (in €)

Years of operation	Net result	Discount rate	Present value
1st year	35.232,00	1.000	35.232,00
2nd year	37.633,60	.9524	35.842,24
3rd year	40.155,28	.9070	36.420,84
4th year	42.803,05	.8638	36.973,27
5th year	45.583,20	.8227	37.501,30
		Total	181.969,65

Net present value for a small horseback riding business:

181.969,65€ - 167.172,10€ = 14.797,55€

Payback period of amount invested (at discount rate 5% annually): 5 years

b. Business/Financial plan for accommodation establishment

The specific business/financial plan refers to an accommodation establishment/guest house of 200,00 square meters in a property of 4.000 square meters. The facilities will include 4 double rooms, a single bedroom for people with special needs and a small apartment which can accommodate up to three people. The reception, the lounge area, the restaurant and the snack-bar will be built in the ground floor while the utility rooms, the restrooms (common restrooms and for people with special needs), the boiler room, storage rooms, laundry and underground parking will be built in the basement. In the surrounding area a pool will be constructed as well as a system of biologically cleaning of building's waste.

- Startup costs

1. <u>Facility and Buildings</u>

This category of startup costs include the expenses related to facilities and buildings of the accommodation establishment such as design and construction of buildings and needed infrastructure. On average, the total cost of the design and construction is estimated as follows:

Table 1: Indicative Design/Construction cost for accommodation establishment

No	Description	Expense (in €)
1	Connection to utility networks (electricity, water, etc.)	4.950,00
2	Construction in the surrounding area (e.g. fence of property; internal road network; tree planting; pool construction)	35.140,00
3	Construction of building and necessary installation (frame building, plumbing, heating, lift, fireplace, painting, electrical Installation etc.)	209.751,01
4	Permits and Licenses	7.000,00
Total Expense		256.841,01

2. Equipment

The costs of the necessary equipment for an accommodation establishment include the purchase of furniture, catering equipment, electrical devices, linen, etc. On average, the total cost of the necessary equipment is estimated as follows:

Table 2: Indicative Equipment cost for accommodation establishment

No	Description	Expense (in €)
1	Purchase of furniture	32.060,00
2	Purchase of electrical devices (TV, laundry machine, dryer	19.929,92
3	Linen	2.234,60
4	Furniture (wardrobes-reception)	4.050,00
Total Expense		58.809,99

3. Promotion

The cost of promotion includes the development of website, leaflets, etc. On average, the total cost for the promotion is estimated as follows:

Table 3: Indicative Equipment cost for promotion of accommodation establishment

No	Description	Expense (in €)
1	Promotional leaflets	680,00
2	Logo	1.000,00
3	Promotion in mass media	750,00
4	Online promotion (website)	1.200,00
5	Other (promotion through website)	500,00
6	Business cards (4-colours)	320,00
Total Expense		4.450,00

Total expense of investment for accommodation establishment:

256.841,01€ + 58.809,99€ + 4.450,00 = 320.101,00€

- Revenues through sales of goods/services and business revenue analysis

The product/service portfolio of an accommodation establishment can be divided into three broad categories: accommodation, snack-bar, and events. The table below exhibit sales projection for each product/service sold for the first five years of its operation. Table 4: Business revenue analysis (turnover) for an accommodation establishment (in €)

Revenue category	Sales projection									
	1st year		2nd year		3rd year		4th year		5th year	
	Occupancy %	Revenues	Occupancy %	Revenues	Occupancy %	Revenues	Occupancy %	Revenues	Occupancy %	Revenues
1. ACCOMMODATION										
Peak Season (from 01/08 until 31/10)										
No. of rooms X days of accommodation X average price per room										
Rooms 12X 90 Days X 35€	70%	26.460,0 0	72%	27.216,00	74%	27.972,00	76%	28.728,00	78%	29.484,00
Middle Season (from 01/02 until 31/07)										
No. of rooms X days of accommodation X average price per room										
Rooms 12 X 180 Days X 30€	60%	38.880,00	62%	40.176,00	65%	42.120,00	67%	43.416,00	68%	44.064,00
Low Season (from 01/11 until 31/01)										
No. of rooms X days of accommodation X average price per room										
Rooms 12 X 90 Days X 25€	35%	9.450,00	37%	9.9 90,00	40%	10.800,00	43%	11.610,00	45%	12.150,00
2. RESTAURANT (Breakfast - meals)										
Days/ accommodation X estimated revenue per day										
Days/ accommodation.......X.............Euros										
3. BAR										
Days/ accommodation X estimated revenue per day										
Days/ accommodation X 4€		9.720,00		10.065,60		10.540,80		10.929,60		11.188,80
4. OTHER REVENUES										
Organization of events in the surrounding area		6.000,00		8.000,00		10.000,00		12.000,00		13.000,00
Total Revenues		90.510,00		95.447,60		101.432,80		106.683,60		109.886,80

- Operation expenses

In this category are included expenses such as the cost for personnel/staff, raw materials, and overhead expenses. The table below depicts some of the most frequent operation expenses on average:

Table 5: Cost of personnel/staff during the 1st operating year for an accommodation establishment (in €)

No	Job description	Months	Cost per month	Annual cost
1	Cleaning staff	12	1.200,00	14.400,00
2	Secretary/Front desk	12	1.300,00	15.600,00
	Total Cost			30.000,00

Table 6: Business expenses for an accommodation establishment (in €)

Category of expense	1st year	2nd year	3rd year	4th year	5th year
1. Staff costs (fees and charges)	30.000,00	30.000,00	30.000,00	30.000,00	30.000,00
2. Raw material costs and cost of services offered					
Raw material					
3. Overheads	15.450,00	17.040,00	18.863,00	21.534,90	22.746,77
Facilities (electricity, etc.)	5.500,00	6.050,00	6.655,00	7.320,50	7.686,53
Maintenance costs	2.000,00	2.000,00	2.000,00	3.000,00	3.000,00
Taxes - Fees	1.200,00	1.440,00	1.728,00	1.900,80	2.090,88
Printed Forms & Stationery					
Cleaning Materials, Clothing	1.400,00	1.680,00	2.016,00	2.217,60	2.439,36
Other expenses					
Other consumables	5.350,00	5.870,00	6.464,00	7.096,00	7.530,00
Rents					
4. Advertising and Promotion Costs	2.000,00	2.000,00	2.000,00	1.000,00	1.000,00
Total Business Expenses	47.450,00	49.940,00	53.308,00	56.602,15	58.154,69

- Operating income and results

Table 7: Operating income and results for an accommodation establishment (in €)

Results	1st year	2nd year	3rd year	4th year	5th year
Total Revenue	90.510,00	95.447,60	101.432,80	106.683,60	109.886,80
Total Expenses	47.450,00	49.940,00	53.308,00	56.602,15	58.154,69
Earnings before Interest, Tax, Depreciation, and Amortization	43.060,00	45.507,60	48.124,80	50.081,45	51.732,11
Less :					
Interest of long / term loans					
Interest on short / term loans					
Earnings before Tax	43.060,00	45.507,60	48.124,80	50.081,45	51.732,11
Less retained earnings income tax 20%	8.612,00	9.101,52	9.624,96	10.016,29	10.346,42
Net Result	34.448,00	36.406,08	38.499,84	40.065,16	41.385,69

Table 8: Present value at discount rate 5% annually for an accommodation establishment (in €) (*assumed that after the 5th year net result remains stable*)

Years of operation	Net result	Discount rate	Present value
1st year	34.448,00	1.000	34.448,00
2nd year	36.406,08	.9524	34.673,15
3rd year	38.499,84	.9070	34.919,35
4th year	40.065,16	.8638	34.608,29
5th year	41.385,69	.8227	34.048,01
6th year	41.385,69	.7835	32.425,69
7th year	41.385,69	.7462	30.882,00
8th year	41.385,69	.7107	29.412,81
9th year	41.385,69	.6768	28.009,83
10th year	41.385,69	.6446	26.677,22
		Total	320.104,35

Net present value for an accommodation establishment:

320.104,35€ - 320.101,00€ = 3,35€

Payback period of amount invested (at discount rate 5% annually): 10 years

c. Business/Financial plan for catering services establishment (restaurant)

The specific business/financial plan refers to a catering services establishment/restaurant of 218,64 square meters in an rented old building that will need restoration, both for operational and aesthetic reasons.

- Startup costs

1. Facility and Buildings

This category of startup costs include the expenses related to facilities and buildings of the restaurant such as replacement of existing doors, windows, floor, and roof. The building will be repainted where necessary and decorative stones will be placed in specific outside areas. Electricity, water and sewerage facilities will be considered for replacement where needed in order to meet the prerequisites of the new catering facilities. As far as heating is concerned, the existing fireplace will be modified into a new energy-efficient fireplace. Finally, an air conditioning and ventilation system will be installed.

Table 1: Indicative Design/Construction cost for catering services establishment

No	Description	Expense (in €)
1	Connection to utility networks (electricity, water, etc.)	860,00
2	Construction of building and necessary installation (plumbing, heating, fireplace, painting, electrical installation etc.)	104.529,50
4	Permits and Licenses	7.000,00
Total Expense		112.389,50

2. <u>Equipment</u>

The costs of the necessary equipment for catering services establishment include the purchase of furniture, catering equipment, electrical devices, linen, gas supply system, etc. On average, the total cost of the necessary equipment is estimated as follows:

Table 2: Indicative Equipment cost for catering services establishment

No	Description	Expense (in €)
1	Purchase of electrical devices (refrigerators, cookers, freezers, laundry machine, etc.)	46.364,00
2	Purchase of catering equipment	16.128,50
3	Purchase of furniture	13.091,49
Total Expense		75.583,99

3. <u>Promotion & Quality Assurance System</u>

The cost of promotion includes the development of website, leaflets, etc. On average, the total cost for the promotion is estimated as follows:

Table 3: Indicative Equipment cost for promotion and quality assurance system of catering services establishment

No	Description	Expense (in €)
1	Promotional leaflets	1.200,00
2	Online promotion (website)	800,00
3	Business cards (4-colours)	300,00
4	Quality Assurance System ISO 22000	3.800,00
Total Expense		6.100,00

Total expense of investment for a small horseback riding business:

112.389,50€ + 75.583,99€ + 6.100,00€ = 194.073,49€

- Sales of goods and business revenue analysis

The product portfolio of catering services establishment includes sales of lunches/dinners (e.g. meat; salads; drinks; beverages). The table below exhibit sales projection for each product sold for the first five years of its operation.

Table 4: Sales of goods for catering services establishment (items)

Category of products/services	Unit	1st year	2nd year	3rd year	4th year	5th year
Meat	items	7.500,00	7.800,00	8.100,00	8.400,00	8.700,00
Salads	items	5.000,00	5.250,00	5.500,00	5.750,00	6.000,00
Beverages	items	3.000,00	3.150,00	3.300,00	3.450,00	3.600,00
Drinks	items	5.000,00	5.250,00	5.500,00	5.750,00	6.000,00

Table 5: Business revenue analysis (turnover) for catering services establishment (in €)

	Unit price	1st year	2nd year	3rd year	4th year	5th year
Total Revenue		70.000,00	80.000,00	92.000,00	104.000,00	116.000,00

- Operation expenses

In this category are included expenses such as the cost for personnel/staff, raw materials, and overhead expenses. The table below depicts some of the most frequent operation expenses on average:

Table 6: Cost of personnel/staff during the 1st operating year of catering services establishment (in €)

No	Job description	Months	Cost per month	Annual cost
1	Waiter	12	1.000,00	12.000,00
	Total Cost			12.000,00

Table 7: Cost analysis – raw and auxiliary material s for catering services establishment (in €)

Category of cost	1^{st} year	2^{nd} year	3^{rd} year	4^{th} year	5^{th} year
Meat	9.000,00	10.000,00	11.000,00	12.000,00	13.000,00
Salads	3.500,00	3.800,00	4.100,00	4.400,00	4.700,00
Beverages	2.500,00	2.800,00	3.100,00	3.400,00	3.700,00
Drinks	5.000,00	5.400,00	5.800,00	6.200,00	6.600,00
Total Cost	20.000,00	22.000,00	24.000,00	26.000,00	28.000,00

Table 8: Business expenses for catering services establishment (in €)

Category of expense	1^{st} year	2^{nd} year	3^{rd} year	4^{th} year	5^{th} year
1. Staff costs (fees and charges)	12.000,00	12.000,00	12.000,00	12.000,00	12.000,00
2. Raw material costs and cost of services offered	20.000,00	22.000,00	24.000,00	26.000,00	28.000,00
Raw material	20.000,00	22.000,00	24.000,00	26.000,00	28.000,00
3. Overheads	15.600,00	16.600,00	16.600,00	16.600,00	16.600,00
Facilities (electricity, etc.)	8.000,00	8.000,00	8.000,00	8.000,00	8.000,00
Maintenance costs		1.000,00	1.000,00	1.000,00	1.000,00
Taxes - Fees					
Printed Forms & Stationery	500,00	500,00	500,00	500,00	500,00
Cleaning Materials, Clothing	1.000,00	1.000,00	1.000,00	1.000,00	1.000,00
Other expenses	2.000,00	2.000,00	2.000,00	2.000,00	2.000,00
Other consumables	500,00	500,00	500,00	500,00	500,00
Rents	3.600,00	3.600,00	3.600,00	3.600,00	3.600,00
4. Advertising and Promotion Costs	2.800,00	1.000,00	1.000,00	1.000,00	1.000,00
Total Business Expenses	50.400,00	51.600,00	53.600,00	55.600,00	57.600,00

- Operating income and results

Table 9: Operating income and results for catering services establishment (in €)

Results	1st year	2nd year	3rd year	4th year	5th year
Total Revenue	70.000,00	80.000,00	92.000,00	104.000,00	116.000,00
Total Expenses	50.400,00	51.600,00	53.600,00	55.600,00	57.600,00
Earnings before Interest, Tax, Depreciation, and Amortization	19.600,00	28.400,00	38.400,00	48.400,00	58.400,00
Less :					
Interest of long / term loans					
Interest on short / term loans					
Earnings before Tax	19.600,00	28.400,00	38.400,00	48.400,00	58.400,00
Less retained earnings income tax	3.920,00	5.680,00	7.680,00	9.680,00	11.680,00
Net Result	15.680,00	22.720,00	30.720,00	38.720,00	46.720,00

Table 10: Present value at discount rate 5% annually for catering services establishment (in €)

Years of operation	Net result	Discount rate	Present value
1st year	15.680,00	1.000	15.680,00
2nd year	22.720,00	.9524	21.638,53
3rd year	30.720,00	.9070	27.863,04
4th year	38.720,00	.8638	33.446,34
5th year	46.720,00	.8227	38.436,54
6th year	46.720,00	.7835	36.605,12
7th year	46.720,00	.7462	34.862,46
		Total	

Net present value for catering services establishment:

208.532,03€ - 194.073,49€ = 14.458,54€

Payback period of amount invested (at discount rate 5% annually): 7 years