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REGIONAL NEEDS ASSESSMENT: GREECE

COMMON BORDERS. COMMON SOLUTIONS.

Regional Needs Assessment: Greece

Partner: Aristotle University of Thessaloniki

ARISTOTLE UNIVERSITY OF THESSALONIKI

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Content

Introduction

This Report is part of the work package GAT1 Setting Strategic Goals for the Heritage- and Culture-based Experiential Tourism of the EU Project ProExTour (Promoting Heritage- and Culture-based Experiential Tourism in the Black Sea Basin) and concerns the Greek region which belongs to Black Sea Basin (for now on BSB-GR). The BSB-GR region consists of two administrative regions in the north of the country, the Region of Central Macedonia and the Region of Eastern Macedonia and Thrace (NUTS codes EL52 and EL51 respectively). With an entire area of 33,352 km^2 these two regions cover the largest part of Northern Greece. The total population of BSB-GR is almost 2,5 million people, 23% of the national population.

The Region of Central Macedonia is the second largest region in Greece after Attica. To a large extent it is an urban region with the city of Thessaloniki, the second largest metropolitan area in the country, being its main urban centre. It occupies 19,168 km^2 and has a population of 1.882.108 people, 17% of the entire Greek population, 58.7% of which live in the Regional Unit of Thessaloniki. Administratively speaking the region is divided into 7 Regional Units, by order of size the Regional Units of Thessaloniki, Serres, Imathia, Pella, Pieria, Halkidiki and Kilkis. The Regional Units of Thessaloniki, Halkidiki and Pieria assemble the highest tourist activity in the Central Macedonia.

The Region of Eastern Macedonia and Thrace is one of the smallest regions in Greece based on area and population. It occupies 14.184 km^2 with a population of 608.182 people, 5,6% of the country's total population. The region's population is more evenly distributed amongst 5 of its 6 Regional Units. The Regional Unit of Evros with 147,947 inhabitants assembles the largest share, 24.3% of the region's population, followed by the regions of Kavala, Rodopi, Xanthi, Drama, all of which are holding a percentage of the region's population fluctuating between 20.54% and 16.16%. The Regional Unit of Thasos, which coincides with the island of Thasos, is the smallest one, with just 2.3% of the region's population. The Regional Units of Kavala and Thasos assemble the highest tourist activity in Eastern Macedonia and Thrace.

Both BSB-GR regions, as well as the entire country, have a well-developed touristic profile, especially regarding their coastal areas, that is comprised predominately of mass summer vacation tourism and to a lesser extent of other, "alternative" forms of tourism including experiential tourism. The latter has only recently been into the agenda of tourism in Greece either through local initiatives, especially of the private sector, or through the government policy and the 365-days tourism campaign.

Regarding heritage and cultural resources, the entire BSB-GR region has very rich tangible cultural resources, relating to various periods in history, a heritage that serves as a major tourist attraction for domestic and international tourism. They also have very rich intangible cultural resources related to the very rich variety of customs and traditions that construct a remarkable and diverse local culture.

The following report aims to assess the main problems, needs and potential for the development of heritage- and culture-based tourism in the entire BSB-GR region. The report is based on a survey of national and regional statistical data, semi-structured interviews with various stakeholders, such tourist companies or culture and heritage providers, which operate in the BSB-GR region, local, regional and national agents, and a questionnaire on consumers' attitudes and perspectives.

1. Economic profile, share of tourism sector and the development of cultural sectors in the BSB-GR region

1.1. Economic profile of the BSB-GR region

In 2018 (year with the most recent available data) the Gross Domestic Product (GDP) in Greece was 179.727 mil €. During the period 2010-2018, the national GDP decreased by an annual rate of change of 2.7% as a result of the economic crisis and recession following the year 2009. Regarding the regional market size, in 2018 Central Macedonia produced 13,7% of the country's total GDP (24,607 mil. €, making it the second region in the country, after Attica, in terms of GDP. The focal point of growth within the region is the Regional Unit of Thessaloniki, concentrating 64.1% of the region's GDP (15,774 mil. €). The contribution of the other Regional Units in the regional market size ranges between 7% (Serres) and 3.7% (Kilkis). Throughout the period 2010-2018 the regional GDP performed a decrease with an annual rate of 2.5%, approximately at the same level with that of the country's average.

The Region of Eastern Macedonia and Thrace, on the other hand, produced in 2018 only 3.8% of the country's total GDP, which was equal to 6,873 mil. €. The Regional Units of Kavala-Thasos and Evros contributed to the largest share of the region's total GDP, 26.8% and 26.1% respectively. During 2010-2018 the regional GDP decreased by an annual average of 3.5%, much higher than the country's average, with the Regional Unit of Xanthi performing the highest rate of decrease (-4,5%).

Gross Domestic Product			
BSB-GR	2018 (€ mil.)	Share in Country	Average Annual Rate of Change, 2010-2018
Central Macedonia	24,607	13.69%	-2,50%
Eastern Macedonia & Thrace	6,795	3.78%	-3,53%
Greece	179,727	100.00%	-2,72%
Data Source: EL.STAT, 2021			

In 2018 the national GDP per capita was 16,745€. In the 2010-2018 period, its annual percentage, fell in average by 4.5% annually, as from 2010 to 2016 it decreased steadily and only in the last two years 2017-18 exhibited a slight increase. Central Macedonia's GDP Per Capita (13,125€), is lower than the country's average and accounts for 54% of the EU28 average. As expected, the Regional Unit of Thessaloniki has a higher GDP Per Capita (14,273€), followed by Halkidiki

(13,806€), Pella (11,968€), Imathia (11,221€), Kilkis (11,193€), Pieria (11,015€), and Serres (10,251€). The region's GDP Per Capita also decreased during the period 2010-2018, at a slightly lower rate (-4.3%) than the national average.

The Region of Eastern Macedonia and Thrace exhibited, in 2018, the second lowest GDP Per Capita in the country at 11,446€, making it one of the poorest regions in Europe (standing at 47% of the EU28 average). The Regional Unit of Kavala-Thasos is the richest amongst the region's regional units averaging a GDP Per Capita of 13,770€, followed by Evros (12,154€), Rodopi (10,416€), Drama (10,340€) and Xanthi (9,713€). The region showed a marked decline (-6.85%) in 2010-2018.

GDP Per Capita		
BSB-GR	**2018 (€)**	**Average Annual Rate of Change, 2010-2018**
Central Macedonia	13,125	-4.33%
Eastern Macedonia & Thrace	11,446	-6,53%
Greece	16,745	-4,52%
Data Source: EL.STAT, 2021		

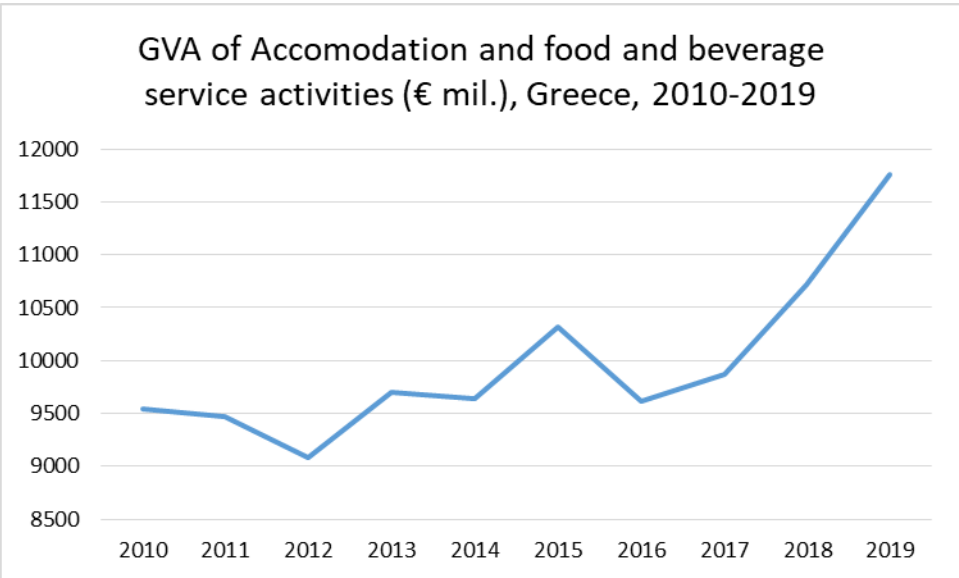
Regarding the overall structure of the main economic sectors, in 2018 the tertiary sector accounted for 80.5% of the total Gross Value Added (GVA) in Greece, while the primary sector was less than 5%. During the period 2010-2018, the GVA of all sectors declined, with the secondary sector performing the highest decline (-28.82%), followed by the tertiary and the primary sector (-20.43% and -1.82%, respectively). The Region of Eastern Macedonia and Thrace is amongst the more rural regions in Greece with a share of the primary sector of more than 8%. Central Macedonia, despite the significance of Thessaloniki's urban economy in the region, also has a higher share of the primary sector compared to the country' average.

Gross Value Added per sector (in € mil.), 2018				
BSB-GR	**primary sector**	**secondary sector**	**tertiary sector**	**Total**
Central Macedonia	1,343	3,510	16,476	21,329
	6,30%	16,46%	77,25%	100,00%
Eastern Macedonia & Thrace	493	1,143	4,320	5,957
	8,28%	19,19%	72,54%	100,00%
Greece	**6,576**	**23,771**	**125,434**	**155,780**

	4,22%	15,26%	80,52%	100,00%
Data Source: EL.STAT, 2021				

In Central Macedonia, the share of the tertiary sector accounts for 77.2% of the regional GVA of the region (and 13.1% of the country) while the secondary sector accounts for 16.6% of the regional GVA. During 2010-2018, the secondary sector fell by 30.28%. The tertiary sector, also, declined in the same period by 18.42%. The regional unit of Halkidiki, whose economy is based primarily on tourism performed the lowest decrease (-8.76%). In Eastern Macedonia and Thrace the tertiary sector accounts for the 72.52% of the total GVA of the region (and only the 3.4% of the country) and the secondary sector for the 19.2% (4.8% of the country). During 2010-2018 the secondary sector fell by 26.5% and the tertiary sector by 28.01%.

Focusing on branches related to tourism industry, in 2019 accommodation and food and beverage service activities (the branch of tourism industry that is recorded by statistical data on GVA) held a share of 7.8% of the total GVA in the country, exhibiting an almost steady increase throughout 2010-2019.



Data Source: EL.STAT., 2020

Employment in Greece declined by 4.2% during 2010-2018. In 2018 more than ¾ of the employees are working in the tertiary sector (75.5%) and significantly fewer in the secondary and primary sector (13.3% and 11.2%, respectively). Employment in the secondary sector exhibited a high decline rate (-20.5%) followed by that of the primary sector (-6.9%), while employment in the tertiary sector remained almost steady (-0.2%) partly due to tourism industry. Employment in the tourism industry increased by 60% during the period 2010-2019.

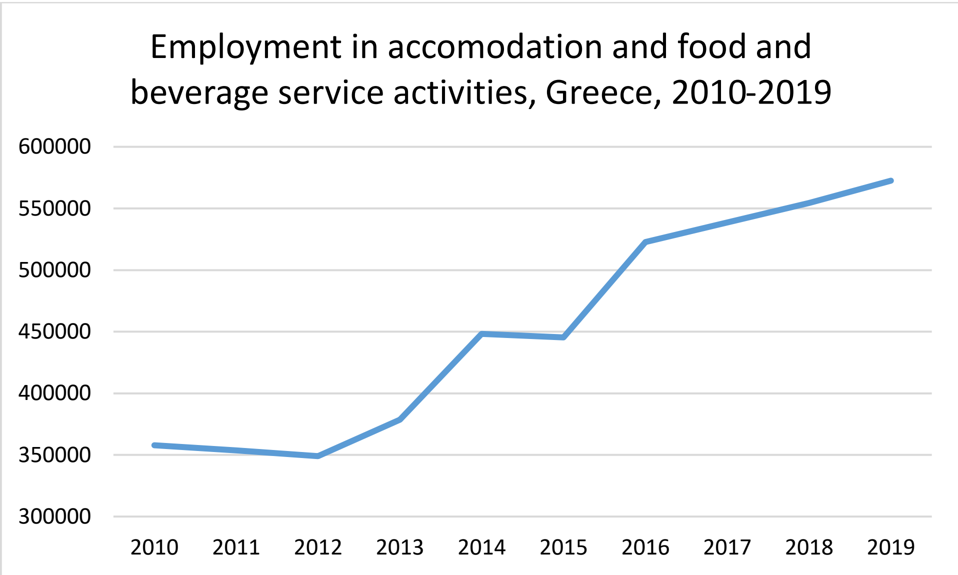
Employment per sector						
BSB-GR	2018					Average Annual Rate of Change, 2010-2018
	primary sector	secondary sector	tertiary sector	Total	Share in Country	
Central Macedonia	94,487	101,800	534,392	730,679	16.20%	-0.65%
Eastern Macedonia & Thrace	59,450	27,077	144,829	231,356	5.13%	-0.39%
Greece	**506,641**	**598,301**	**3,404,164**	**4,509,106**	**100.00%**	**-0.53%**
Data Source: EL.STAT., 2021						

Employment in Central Macedonia represented 16.2% of the total employment in the country in 2018. The region showed a similar employment pattern to that of the country, as 73.1% are employed in the tertiary sector (15.7% of the country's employment in this sector), 13.4% in the secondary sector (17% of the country's) and 12.9% in the primary sector (18.6% of the country's). Eastern Macedonia and Thrace accounts for 5.1% of the employment in the country. Employment in the primary sector is significantly higher (25.7%) compared to the national average and to Central Macedonia and represented the 11.73% of the country's total employment in this sector in 2018. Of course, the tertiary sector had the largest share in the total employment of the region (62.6%, contributing only by 4.2% to the country's total employment in this sector). During the period 2010-2018, employment in the tertiary sector increased by 2.3%, an indicator that could be attributed to tourism industry.

In 2019 a total of 572.518 people was employed in the sector of accommodation and food and beverage service activity in Greece. Employment in this sector increased by 60% during the entire 2010-2019 period and by 27,8% during 2014-2019. In the BSB region employment in the same sector accounts for 11,7% of the country's total, with the share of Central Macedonia being 8,5% of the country's total. In both regions, employment in this sector increased throughout the period 2014-19, especially in Eastern Macedonia and Thrace.

Employment in the sector of accommodation & food and beverage service activities		
BSB-GR	2019	

	Accommodation	Food and beverage service activities	Total	Share in Country's employment in the sector	Rate of Change, 2014-2019
Central Macedonia	8,187	40,255	48,442	8.46%	6.39%
Eastern Macedonia & Thrace	2,479	15,845	18,324	3.20%	49.10%
Data Source: INSETE Intelligence, 2020					



Data Source: EL.STAT., 2020

1.2. Tourism activity in the BSB-GR region

Historically, the development of tourism in Greece has followed a dynamic course in the post-World War II period but intensified after the mid-1970s. The dramatic increase of tourism flows to Greece was facilitated by the extensive ancient historical attractions, rich cultural, natural, environmental resources and good climate (Buhalis, 2001). Indicatively, a long coastline covering about 1/3 of the Mediterranean’s coasts (due to its large family of islands), a unique fauna and flora, climatic superiority with mild winters and warm summers, many high quality beaches and cultural and historical sites are some of the distinct characteristics of Greece (Mylonas P., Voumvaki F., Savva M. & Koutouzou A. , 2014).

The first organized attempts to promote tourism were by the adoption of mass tourism model. Thus, Greece has relied heavily on a “sun-sea-antiquities” tourism product, which is characterized by seasonal and geographical concentrations of tourists mainly during summer, at seaside resorts (Kouri, 2012) and especially at island destinations that receive the majority of incoming tourist arrivals (Buhalis D. & Deimezi O, 2004). Multiple coastal and insular locations have become well-known destinations for leisure tourism and recreation. In these locations, the tourism and recreation sector represent a diverse group of enterprises ranging from travel agencies, hotel businesses, restaurants and car rental companies to retail shops, agricultural goods suppliers and other goods and services providers (Polyzos S. & Minetos D., 2011). As the Greek coastal areas and islands concentrate a large part of national population and economic activity, pressures on coastal resources are also being observed, some of which constitute the very basis of tourist developments (Coccossis H. & Constantoglou M., 2005).

Mass tourism has caused a rise in pollution, a depletion of water supplies, desertification, rural emigration to urban centers, erosion of coastal areas and a drop in hygienic standards, all of which have had serious economic costs (Smith, 2011). The negative effects of mass tourism on destination areas, as well as the development of alternative forms of tourism in many parts of the world, have created the basis for the development of alternative types of tourism in Greece. Hence, during the last decades, Greece expanded its tourism identity by developing rural (ecotourism, agrotourism, wine tourism), sports, cultural, gastronomy, religious - pilgrimage, thermal - therapeutic waters and sea tourism. However, it is worth mentioning that alternative types of tourism are still underdeveloped in Greece compared to other countries, due to a number of reasons, such as the unsuccessful cooperation between public and private agents and the absence of systematic planning processes of targeted, consistent, and long-term policies (Kouri, 2012). The relevant research indicates that Greece is still perceived as a summer sea-and-sun destination, whereas alternative types of tourism have not yet developed into a primary tourism motivator (Kouri, 2012). So, the Greek tourism product, composed of infrastructure and services, is still primarily addressed to mass tourism model (Coccossis H. & Constantoglou M., 2005).)

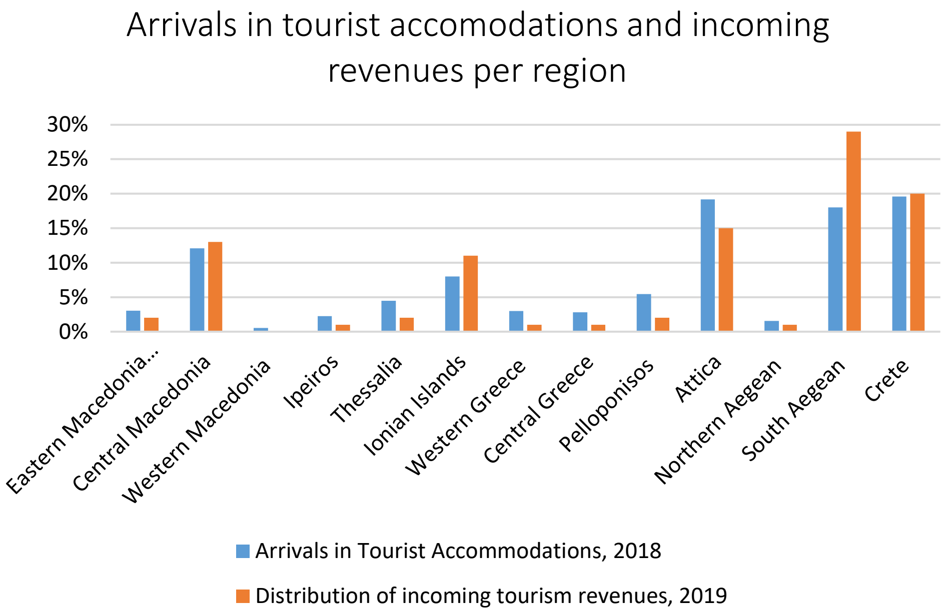
Regarding the overall tourism indicators, it is estimated that tourism, through its various sectors and branches, has a very crucial contribution to the national economy which reached in 2018 an estimated figure of more than 30% to the GDP and more than 25% to the total employment.

Basic figures on Greek Tourism, 2018	
Total contribution to GDP	30,9%
Total contribution to employment	25,9% of total employment
Total employment	986,600
International tourism receipts	15.6 bn €
International tourism arrivals	30.1 ml (cruise passengers not included)
Seasonality	54,8% in July – August – September

Top 5 airports	Athens, Heraclion, Rhodes, Thessaloniki, Corfu
Source: https://sete.gr/en/strategy-for-tourism/basic-figures-repository/	

As expected, two island regions, the regions of South Aegean and Crete, concentrate the highest share of incoming tourism revenues amongst the Greek regions, almost half of the total incoming revenues, as they include some of the more popular tourist destinations internationally. Attica Region and the Region of Central Macedonia record the third and fourth highest share in the incoming tourism revenues 15% and 13% followed by the region of the Ionian Islands. The Region of Eastern Macedonia & Thrace along with the Regions of Pelloponisos and Thessalia contribute for only 2% in the incoming tourism revenues, while the Regions of Ipeiros, Western Greece and Northern Aegean contribute for 1% and, finally, Western Macedonia for less than 1%. Therefore, the share of the BSB region in the incoming tourism revenues is 15% on the whole, a figure that represents 13% contribution to their total GDP.

Incoming tourism revenues and contribution to GDP		
BSB-GR	**Distribution of incoming tourism revenues, 2019**	**Direct contribution of tourism to the GDP of the Region, 2019**
Central Macedonia	13%	12%
Eastern Macedonia & Thrace	2%	8%
Greece	**100%**	**13%**
Data Source: INSETE (2020a & b)		



The arrivals in tourist accommodations in Greece, for the period 2012-2018, increased by 50.8% (with an average annual rate of 7.1%). In 2018, regarding arrivals, the Region of Central Macedonia contributed to Greece's tourism scene by a share of 12.1%. The Regional Units of Thessaloniki (to a large extent due to its airport) and Halkidiki are the two principal tourist destinations in the region. In 2018, Thessaloniki was leading the charts, recording a 49.2% share of the region's total arrivals in tourist accommodations followed by Halkidiki (33.5%), Pieria (9.5%), Serres (3.2%), Imathia (2.1%), Pella (1.79%) and Kilkis (0.5%). Throughout the 2012-2018 period the region performed a considerable increase in arrivals by 37.7%, though lower compared to the country, with the Regional Unit of Pieria performing the highest increase (57.37%) followed by Thessaloniki (47.89%).

The Region of Eastern Macedonia and Thrace plays a rather limited role in the country's tourism scene as it concentrates just 3% of the county's total arrivals in tourist accommodations. In 2018, almost half of the arrivals were recorded in the Regional Units of Kavala-Thasos (48.9%), followed by Evros (22.7%), Xanthi (12%), Rodopi (10.8%) and Drama (5.6%). However, the region achieved a significant increase of more than 50% in arrivals in the 2012-2018 period, an increase slightly higher than the respective national average increase. The regional unit of Xanthi recorded the highest increase at a percentage of more than 110%.

Arrivals in Tourist Accommodations (2012-2018)

BSB-GR	2012	2018	Share in the country, 2018	Average Annual Rate of Change
Central Macedonia	1,954,631	2,691,440	12.07%	7.13%
Eastern Macedonia & Thrace	446,384	674,734	3.02%	5.48%
Greece	**14,790,696**	**21,304,135**	**100.00%**	**7.09%**
Data Source: EL.STAT., 2019				

During the period 2012-2018, overnight stays in tourist accommodation in Greece were steadily increasing (by a total of 42.2%). Overnight stays in the Region of Central Macedonia represent more than 10% of the total in the county. The Region exhibited an increase in overnight stays but with a lower rate (23.8%) than that of the country. The overnight stays increased in all of its Regional Units, ranging from 85.7% (Kilkis) to 1.1% (Serres). Eastern Macedonia & Thrace concentrates only 2.3% of the total overnight stays in the country. Overnight stays were increased by a higher rate (37.2%) than that of Central Macedonia, but lower than the country's average. Apart from the Regional Unit of Evros that performed a decrease (-11.6%) in the overnight stays, in all other Regional Units overnight stays increased, in rates fluctuating between 81.1% (Xanthi) and 18.3% (Drama).

Overnight Stays in Tourist Accommodation (2012-2018)				
BSB-GR	2012	2018	Share in the country, 2018	Average Annual Rate of Change
Central Macedonia	7,707,423	9,538,709	10.42%	3.62%
Eastern Macedonia & Thrace	1,532,316	2,101,808	2.30%	5.41%
Greece	**64,384,415**	**91,569,437**	**100.00%**	**6.05%**
Data Source: EL.STAT., 2019				

In 2018, the national average in the indicator 'tourist accommodations' plentitude' was 52.7% and performed a gradual increase (total 22%) in the period 2012-2018. In Central Macedonia tourist accommodations' plentitude was 47.1% lower than than the national average and it had performed a lower rate of increase in 2010-2018 (11.6%). All the Regional Units exhibited an increase in this indicator, ranging from 44.1% (Kilkis) to 11% (Serres), except from Chalkidiki where tourist accommodations' plentitude was slightly decreased (-1.1%). Eastern Macedonia & Thrace's tourist accommodations' plentitude is significantly lower (36.2%) than the country's average. However, during 2012-2018, the rate of increase (21.5%) was similar to that recorded in the country. The Regional Unit of Kavala marked the highest increase in the 'tourist accommodations' plentitude' indicator (98%) followed by Xanthi (83,4%) whereas much lower rates were marked in Thasos (17.4%) and Rodopi (16.3%). On the contrary, tourist accommodations' plentitude in the Regional Units of Drama and Evros decreased by 34.3% and 6.3%, respectively.

Tourist accommodation plentitude (%) (2012-2018)			
BSB-GR	**2012**	**2018**	**Average Annual Rate of Change**
Central Macedonia	42.2	47.1	1.85%
Eastern Macedonia & Thrace	29.8	36.8	3.30%
Greece	**43.2**	**52.7**	**3.37%**
Data Source: EL.STAT., 2019			

1.3. The cultural sectors in BSB-GR and its links to tourism

The BSB-GR regions have a rich and diverse stock of both tangible and intangible heritage related to their long history and human presence in their territory from the pre-historic era to the modern years. Both BSB-GR regions also have a well-developed touristic profile, especially in the famous coastal areas, that is comprised predominately of mass tourism from other parts of Greece and abroad and - to a lesser extent - from "alternative" forms of tourism.

Regarding the tangible cultural resources, being the cradle of the ancient Macedonian civilisation, boasts a very rich cultural heritage that serves as a major tourist attraction. Both BSB-GR regions incorporate the majority of the territories of ancient Macedonia. The region is home to 4 out of 18 UNESCO World Heritage sites encountered in Greece, including Aigai (modern Vergina), the first capital of the Macedonian kingdom, where a world-famous museum with high historical and archaeological impact is located. Pella, which replaced Aigai as the capital of Macedon in the fourth century BC, best known as the historical capital of the ancient kingdom of Macedon and birthplace of Alexander the Great, is another important historical site with archaeological interest. Additional points of interest are the ancient city of Stagira located in Halkidiki, which is the birthplace of Aristotle and Dion, in Pieria which used to be the most important sacred city of the Macedonians, while other important archaeological areas include Amphipolis and Philippi (another UNESCO World Heritage site), located in eastern Macedonia.

The BSB-GR regions have been under the political, cultural and linguistic influence of the Greek world since the classical era; Philippi Greeks extensively colonised the region (especially the coastal part) and built prosperous cities including, among others, Abdera (home of Democritus and of Protagoras) and Maroneia (the largest and most important of the ancient Greek colonies of Western Thrace). During the Byzantine Empire era, Western Thrace benefited from its strategic location close to the imperial heartland and became a centre of medieval Greek commerce and culture; later, during the Ottoman Empire era, a number of Muslims settled there, marking the birth of the Muslim minority of Greece.

Thessaloniki, the capital of the region, is an important pole of attraction with specific potential for growth of experiential tourism, as the locus of the byzantine heritage with a great number of tangible cultural resources. Historically, Thessaloniki has been playing an important role in the formation of the Greek and the Balkan area culture. The city has been for several centuries the second-most important city of the Byzantine Empire and also played an important role for Christianity during the Middle Ages and the Ottoman years. A great number of buildings with significant architectural interest of all historical periods and architectural types, are located at the city centre. Fifteen monuments in Thessaloniki (especially from the Byzantine period) are listed as UNESCO World Heritage Sites (UNESCO, 2020), among which the Rotonda (or Rotunda), one of the most archaeologically important monuments of the Roman times in the city. The city also hosted the largest community of Jewish people in Europe of Sephardic origin that were persecuted by Nazis during the Holocaust. Apart from the historical monuments and important museums, including the Archaeological museum, the Museum of the Byzantine culture, and the Macedonian museum of Modern Art, Thessaloniki hosts regular fairs of international appeal. The "International Trade Fair" organized every September/ October is the largest trade fair in the Balkans. The city hosts the "International Film Festival", the "Thessaloniki Documentary Festival", the "VideoDance Festival" annually, and "Dimitria", an annual cultural festival. Thessaloniki is also an important hub for urban tourism and gastronomy. Veroia, another important city of the BSB-GR region, has a significant number of monuments from the Byzantine era, including numerous churches.

With regards to residences, local architecture in the BSB-GR region is characterised by features quite similar to the ones of the ancient Greek and Byzantine architectural period. The most important ones are the same orientation (south) and the yard, which along with the buildings defines the internal court and has a deeper symbolic and functional importance beyond the safety one. In addition, a common feature and essential place of the traditional northern Greek residence is the veranda with a roof known as "*hagiati*", where a great part of the everyday family activities takes place. The main building materials were earth blocks for the plain villages and stone from the sub-mountainous or mountainous regions. These characteristics are found in several traditional settlements of Central Macedonia and Eastern Macedonia and Thrace. It is worth mentioning that the Old Town of Xanthi (which is located in the centre of the modern city of Xanthi, in the region of Thrace) is known for its distinctive architecture, including many Byzantine Greek churches, neoclassical mansions from the 18th and 19th centuries and Ottoman-Era mosques.

Furthermore, Mount Olympus, Greece's tallest mountain, known worldwide as the home of the Greek gods, is also noted for its exceptional biodiversity and rich flora and is on the UNESCO's tentative list for nomination. It has been the first designated National Park in Greece, since 1938. Mount Athos, also known as "Agion Oros" is an important centre of religious tourism. Mount Athos is a mountain and peninsula in Halkidiki and an important centre of Eastern Orthodox monasticism. Due to the architectural value of the great number of monasteries which are located there and the unique landscape of the peninsula, it constitutes the third UNESCO heritage site of the BSB-GR region.

The "Wine Roads of Northern Greece" is an initiative of the wine producers' association to support the vine-growing and wine-making tradition and give the opportunity to Greek and foreign visitors to discover the vineyards of Northern Greece. Overall, 33 wineries participate in this association offering a wine tourism proposal to visitors and supporting cultural heritage, focusing on grape growing, wine and on local cultural activities.

Regarding the intangible resources, both BSB-GR regions have a very rich variety of customs and traditions that construct a remarkable and diverse local culture. These customs and rituals of the regions have been further enriched by those brought in by the arriving refugees as a result of the treaties of Neuilly (1919) and Lausanne (1923) that mandated a forceful exchange of Greek population with Bulgaria and Turkey, respectively. The descendants of these people continued following their traditions creating a palimpsest, prosperous, and varied cultural profile. Most of the customs in the region are often linked to religion and practiced in the celebrations called "*Panigiri*". The "*Panigiri*" custom is a celebration to pay tribute to a Saint, who is worshiped locally. The festival includes chanting and praying, as well as traditional music, plenty of local food and locally produced wine.

"*Anastenaria*" and "Pechlivanides" are two additional local customs of the BSB-GR region. The "*Anastenaria*" is a traditional barefoot fire-walking ritual with ecstatic dance performed in some villages of Northern Greece. The rituals survive in the original form in five villages of the BSB-GR region (Ayia Eleni, Langadas, Melike, Mavrolefke and Kerkine). The communities which celebrate this ritual are descendants of refugees who came to Greece from Eastern Thrace after the Balkan Wars in 1911–12 and the population exchange between Greece and Turkey in 1923. It is worth mentioning that the same ritual survives in areas of Bulgaria, too. The "*Pechlivanides*" is a tournament of traditional wrestling. The wrestlers, who called "*Pechlivanides*", fight covered with olive oil and wearing the "*kiouspeti*", a pair of knee-length pants made of goat skins. The tournament lasts until the evening, and the reward for the winners is gathered by the village community throughout the whole year. The tournament is still maintained in some areas of the BSB-GR region.

The BSB-GR region is well known for its cuisine and it could definitely become a gastronomic destination. Local cuisine includes a mosaic of tastes, influenced by the Greek and wider Balkan and Mediterranean cuisine, including dishes from the byzantine and ottoman past. These influences are met in dishes from the Cappadocian, Pontic, Arvanide's, Jewish population and the local Macedonian and refugees from Asia Minor and Istanbul.

In summary, the BSB-GR region combines a strong history and a high number of various historical monuments while hosts people with a deep cultural background. Considering the rich natural recourses, the region could play an important role in the development of experiential tourism both in the country and in the wider area. Overall, the region has an important stock of both tangible and intangible resources that can be further mobilized in order to offer remarkable alternative tourist experiences.

2. Specifics of the products and enterprises: main problems and needs raised by the field research

2.1. Profile of the field research

Our methodology consisted of a mixed methodological approach, utilizing both qualitative (in-depth interviews with the use of an interview guide) and quantitative methods (survey with the use of a questionnaire). These two different strands of research allowed us to collect rich inputs on the topic of our interests while at the same time complement each-other. In terms of the time-period of the research, both our surveys, the qualitative and quantitative were conducted in the period from October 2020 to January 2021[1].

Qualitative research – in-depth interviews

As a first step, the research team performed an extensive desktop research aiming to better understand the historical background and map the cultural heritage (both tangible and intangible) of the BSB-GR region. In preparation of the quantitative phase of the research the research team constructed a list of 100 potentially relevant interviewees representing all the categories[2] that we had identified. The list was further enriched in the course of the research.

The interview guide, common to all the participating countries of the project, was translated into Greek to further assist the interview process. In order to select the most relevant informants

[1] During the period of the research Greece was under a lockdown as a result of the Covid-19 pandemic.
[2] see Appendix II

for the purposes of our research we communicated using emails that included a description of the project, the questions to be used during the interview for the better preparation of the informants and the invitation for the interview. Subsequently, appointments were booked for the interviews / discussions. Due to the restrictive measures for the Covid-19 pandemic all the interviews took place over phone or skype. In total, a number of 25 in-depth interviews were conducted. The interviews lasted between half an hour to an hour depending on the informant and the pace of the interview.

Categories and organizations represented in the questionnaire survey	
Category	**Organization represented**
Government	Region of Central Macedonia, Tourism Directorate
	Tourism Office of the Regional District of Imathia
	National Organization for Tourism (EOT)
Public Organizations	Folklife & Ethnological Museum of Macedonia - Thrace
	Ephorate of Antiquities of Halkidiki and Mount Athos
	Ephorate of Antiquities of Drama
	Archaeological Museum of Thessaloniki
	Rodopi Mountain Range Management Body
Destination management organizations	Hellenic Hoteliers Federation
	Greek Tourism Confederation (SETE)
Accommodation	Kapsali Farm
	Traditional guesthouse of Demosthenes
	Alexandrou Traditional Guesthouse
	Hotel Nemesis
Experience	Ziogas Western city
	Workshop "Playing on Traditional Paths"
	Veria - Volta
	The estate in Bairi
	Tsipeli Estate
Bike tours	Trigiro
Tourist office	Miltos Kesoglou
Thematic Tours	Dot2Dot

	Epiculiar tours
Restaurants / gastronomy	Ktima Gerovasiliou
	Ktima Kyr Giannis

At the same time, throughout the course of the survey the members of the research team kept having weekly and additional ad hoc meetings with the purpose to debrief each other of the achievement and the weekly progress, discuss the challenges faced and also any interesting information that might have emerged from the interviews.

Quantitative research – survey questionnaire

The structured questionnaire on consumers attitudes, common to all the members of consortium was translated into Greek, in order to be easily accessible to the public to which it was addressed in Greece. The questionnaire was then moved online and remained open for reply from the 22nd of December 2020 to 11th of January 2021. Both versions, were used simultaneously, both the Greek and English, for the non-Greek speakers. The questionnaire was further promoted by the members of the research team through both their personal and professional social media networks, via email but also through personal messages. During the period that the questionnaire remained online, a total number of 554 questionnaires were completed (117 in the English version and 437 in the Greek version). After collecting the data retrieved, the two datasets were combined into one and a statistical analysis was carried out. For the purpose of our analysis, we used mostly descriptive statistics in order to present the results of the close-end questions while further analysis was performed in order to capture the replies of the participants in the open-ended questions.

Our analysis and the results collected from the two different strands of our empirical inquiry aim to feed into our work in preparing a regional needs assessment report for the development of experiential tourism in the Greek regions of the Black Sea basin.

2.2. Specifics of the offered tourist products/services: main problems and needs

Selective forms of tourism are gaining importance in the tourist market of both BSB-GR regions, Central and Eastern Macedonia and Thrace. In particular, the new competitive environment and the dynamic character of tourism impose a transition from the conventional understanding of a destination from the aspect “sun and sea” model toward the concept of destination as an overall and integrated experience. It is worth mentioning that mass tourism seemingly has, and will continue to have, an indubitably great importance for the development of Greece’s tourism industry. However, the current tourist demand is undergoing a great transformation, with experience becoming an essential part of a journey, by integrating multidimensional parameters such as the environment, culture, gastronomy and overall sustainability. Despite the worldwide development of experiential tourism, in Greece, and especially in the regions of Central and Eastern Macedonia and Thrace, in the context of culture and heritage, it has begun to develop only in recent years. So, this part of the filed research aimed at exploring the specifics of the offered experiential tourist products/services, the main problems and the needs raised by the semi structured interviews with experts and stakeholders and the desk research conducted in the BSB-GR regions.

In general, the experiential touristic product in Greece is a dynamic combination of various complex elements. So, it is crucial to identify in this context those dimensions that diversify the experiential touristic product from the traditional one. First, the basis of the product is the anthropocentric approach. This means that the product development is customer- and local community based oriented, by focusing on the visitor's value and needs. For instance, some of the already developed experiential activities in the BSB-GR region are designed based on the interests and specifics of the visitor. In addition, it is characterized by the active and true connection with the local community. It is worth mentioning that the personalized encounter between the local people and visitors, as provided in some themed walks, alternative routes and experiences, plays a central role in the quality of the tourist product and experience. Furthermore, according to the most expertized on experiential tourism stakeholders, hospitality and friendliness of Greek people are key elements in the creation of unique, "authentic", and memorable tourist experiences.

In addition, the existing experiential activities provide the stimulation of senses, the generation of emotions, as well as the physical activation. In other words, the tourist experience product can be defined as a way to stimulate the senses, heart, mind and body. Another key element in the experience economy of both the BSB-GR regions is memory. The interviewed tourism experts support that linking memory with local culture, through culinary ways, for example, enhances the visitor's experience and influences the ability to recollect past travel experiences or to retrieve vivid information about them.

In order to achieve a memorable experience, the outstanding role of active participation is underlined in contrast to the passive entertainment. To achieve this, the fewer the participants, the more authentic the experience is perceived. So, most of the developed activities are in small groups.

The findings from the stakeholders' questionnaire indicated that in both BSB-GR regions, <u>experiential tourism</u> is confronted as a 'general term' that encompasses <u>culture</u>, <u>gastronomy</u>, <u>rural</u> and <u>adventurous experiences</u>.

For instance, in the <u>cultural field</u>, there are alternative guided tours, themed walks and routes in the city and nearby archaeological sites. In some cases, these activities combine physical activities such as biking, wine and food tasting and local cooking lessons. It is worth mentioning that the selected sites are not necessarily historical landmarks or basic historical places of the city, but points with a hidden history. In such experiences, the enrichment of the touristic product is achieved by raising issues such as fantasy, and play. Visitors are invited to uncover mysteries or solve enigmas and many times historical information is given through a small minute performance by actors.

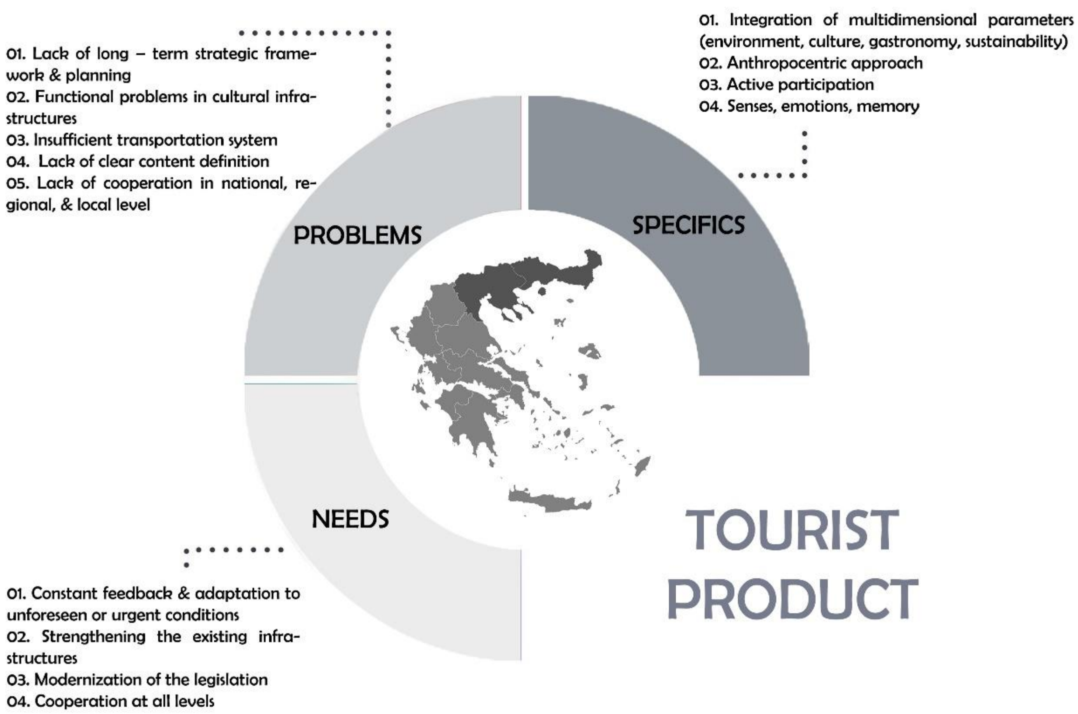
In the context of gastronomic tourism there are wine trails and wineries that introduce visitors to local culture and tradition through winetasting, but also with their active participation in the wine production process, depending on the season (for example vine – harvest). Sometimes, cooking workshops are organized for the visitors by using not only ingredients by the vineyard, but also local ones.

In the field of agricultural tourism, in both BSB-GR regions, it is observed that activities related to tourism experiences have been developed mostly in rural, remote areas. This is justified by the fact that, on one hand, these areas need to be competitive, and on the other hand, rural territories often present a rich set of unique natural resources that allow an "authentic", and memorable tourist experience. The experiential activities related to this field are essential oils distillery, visits in farms and olive groves and participation in the agriculture and beekeeping process, and also tours about the agriculture way of life. It is worth mentioning here that most of these experiences cannot be categorized in the basic, existing touristic sectors such as accommodations, restaurants, tour agents, tour guides etc. This can be translated as a need for the revision of the existing touristic model and context in Greece. In conclusion, in the rural areas there are many physical and adventurous activities such as trekking, horse riding, river trip with canoe-kayak, rafting and mountain biking. Some of them are connected with cultural activities, such as mushroom and traditional herb hunting.

The aforesaid facts and dimensions highlight that the existing experiential tourism product should be characterized by high quality. However, the quality dimension derives, except for the basic tourist product and services, from factors and related services such as infrastructures, public transport, banking, insurance (safety and security) and accessibility. The research has shown that both BSB-GR regions lack a strategic planning of cultural infrastructures. This means that some of the main archaeological and historical monuments and especially those in distant areas are closed on weekends or, even worse, completely closed. Furthermore, sometimes in these sites there are functional problems such as poor maintenance and damaged ticket offices. In addition, integrated public transport system is an important precondition for travelling. Of special importance are the problems related to the transportation system. In particular, there is insufficient interoperability between different modes of transport and poor connection between distant geographical areas with the central ones, due to the fact that some areas have remained underdeveloped in public transports. Regarding accessibility, it is important to mention that in some of the existing activities, especially related with alternative tours, particular attention is given by specifically designed tours for the disabled, the elderly and people with less opportunities by well qualified specialists. However, all these actions comprise private initiatives.

Practice shows a lack of long – term strategic framework and planning for managing experiences and a lack of clear content definition by government. Therefore, all geographical areas are approached in the same way, without paying attention to several distinctive particularities and specific characteristics of minority areas. Furthermore, the anachronistic legislative framework acts as experiential tourism growth inhibitor. The deficiency of a strategic framework for the implementation of strategies for cultural experiential tourism at all levels is intensified by the lack of cooperation at a national, regional, and local level. The findings of the survey highlight the fact that it is necessary, firstly, to invest a lot of effort and mobilize several players in order to achieve an efficient cooperation between essential participants in the sector and build an attractive, high quality experiential tourist product. Secondly, an alternative operational body may be required, such as a Destination Management Organization (DMO), with deep knowledge on the advantages and special features of each destination. In this way, areas and destinations that may not have been so interesting, would develop their comparative advantages and create a high-quality experiential product.

In the graph below we summarize the specifics of the tourist product and the main problems and needs raised by the present research.



All the aforementioned findings prove that the experiential touristic product is dynamic and multidimensional and requires a constant feedback and adaptation to unforeseen or urgent conditions, such as the Covid -19 pandemic, in order to become sustainable and face all the challenges. However, it is necessary to strengthen the existing infrastructures and modernize the legislation related to tourism and its alternative forms, under a climate of cooperation and solidarity at all levels. Finally, considering that traditional tourists still look for the "sun and sea" vacation model, the experiential tourism product will grow in slower rates.

2.3. Specifics of the tourism enterprises: main problems and needs

As tourism is growing rapidly worldwide, alternative types of tourism have been introduced at both a local and a regional level. Therefore, for some time now, increased interest in alternative forms of tourism has been observed in tourism businesses in Greece, in general, as well as in both BSB-GR regions. Despite the growing attention to experiential tourism internationally, only a small percentage of enterprises related to tourism have developed experiential activities in both BSB-GR regions, Central Macedonia and Eastern Macedonia and Thrace. This part of the report presents the specifics of the tourism enterprises, the main problems and needs of businesses which operate in field of experience, as they were raised from the findings of desk research and the semi-structured interviews with stakeholders from the public and private sector in both BSB-GR regions.

It is worth mentioning in advance that among the interviewed enterprises only a few have a deep understanding of the definition and dimensions of experiential tourism. These were newly established businesses related to alternative tours and experiences and focus their activities exclusively in the experiential sector. In other words, their philosophy is to create unforgettable memories to visitors related to the local history and way of life. All the other interviewed tourism businesses are existing accommodations or tourism enterprises that have shifted from offering mass tourism services to services which incorporate physical activities such as horse riding, hiking and walks in nature. Furthermore, the survey revealed a gap between the existing and conventional categorization of tourism enterprises as some of the existing businesses in the experiential sector could not be classified in the existing tourism categories (accommodation, restaurants, tour agents, tour guides, public institutions etc.). In addition, it has been observed that some businesses (tour guides and accommodations) misunderstand the term ‘experiential tourism’. This proves that experiential tourism is still also a new research field in Greece.

Regarding the existing businesses, the most experiential-oriented ones with a fully designed tourism product are related to alternative tours, agricultural and wine activities and are located mainly in the Region of Central Macedonia. While, in the rural and remote areas of the BSB-GR region, appealing and distinctive experiential offerings have been developed by accommodation enterprises, in order to survive in the competitive international context. It should be noted that gastronomy experiential activities, such as food and wine tasting and traditional cook lessons, are organized by wineries, agricultural businesses and traditional cooperative organizations. This reflects a lack of involvement in this sector of the restaurant industry, in both BSB-GR regions.

Tourism enterprises related to experiential tours, walks and activities pointed out that their activities have to appeal to the tourist’s fond desires and imaginative associations. To do so they have to draw on myths, histories, and fantasies, mainly associated with the local culture and history of the region. However, considering that visitors are on a “quest for authenticity” on their trips and experiences, tourism enterprises offer “staged authenticity” to promote locality through storytelling techniques. Also, in order to offer a high-quality experiential product, they highlighted the need for a strategically designed scenario, with an emphasis given on the surroundings and the triggering of senses, feelings, emotions and thoughts. It is worth mentioning the absence of co-creation process between businesses and visitors, but most of the times, their active participation is observed.

The survey has revealed a huge gap between the philosophy and pricing policy within experiential tourism businesses and travel agencies. Well organized experiential businesses acknowledge that a high-quality product (fully designed with a qualified personnel) requires higher pricing policies compared to mass tourism services. At the same time, travel agencies in Greece, in contrast to international travel agencies, regard the offered experiential product as overpriced. This proves a lack of cooperation between these sectors and a low level of knowledge of the experiential's product high quality importance.

It is also necessary to mention the basic skills of the employees in the tourism experiential sector. A successful experiential tourist offer requires deep and specific knowledge and skills of the particular activity, history and culture of the place and the dimensions of experiential tourism. However, an interdisciplinary approach seems to be a key element in order to design, package, and deliver the resulting experiential content. Constant passion, inspiration and creativity about the activity's subject are basic features for an employee in an experiential tourism business. Crucial requirements also include very good knowledge of foreign languages, as well as social and communication skills (such as storytelling) for shaping a friendly and interesting cultural contact, and promoting Greek hospitality, which comprises a major asset of Greek culture. Finally, a sustainable tourism product should adapt in the global competitive environment. Therefore, employees should constantly be trained and educated in the new tourism trends and challenges. All these factors are crucial in the production of a high quality experiential tourism product.

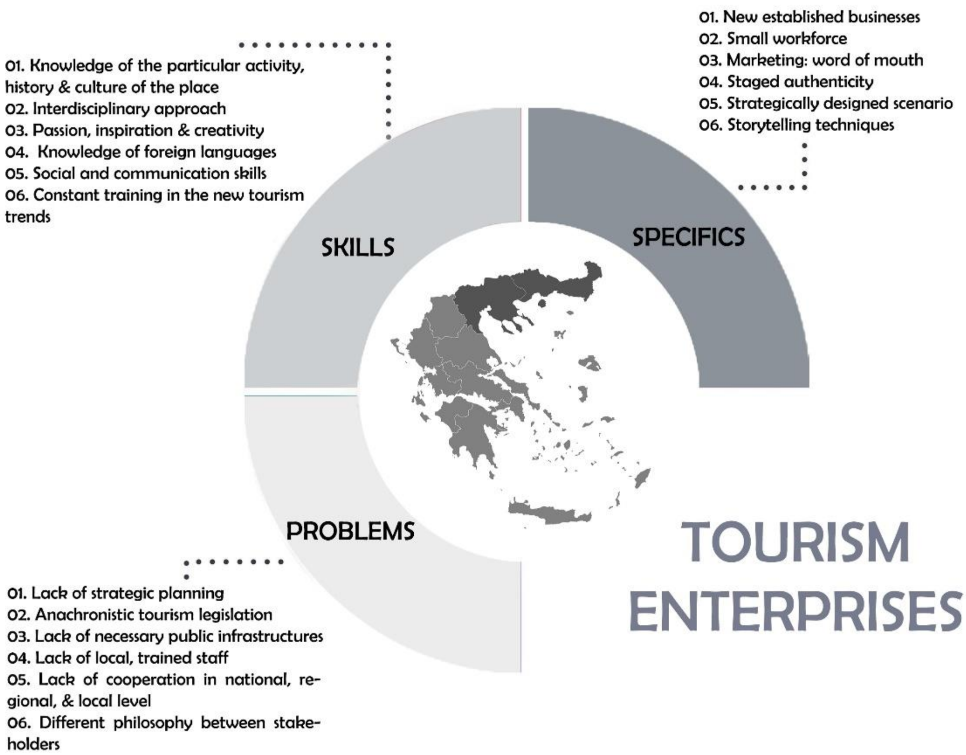
The concept of an experiential product has been implemented mainly by newly established businesses with a small workforce that, most of the times, comprises family businesses. The promotion techniques of experiential products focus on digital marketing through social media, websites and web platforms. However, according to the enterprises surveyed, the "word of mouth" communication is the most important and efficient marketing practice. All the aforementioned facts clearly manifest that, today, internet enables the traveler to socialize the experience during the whole process. This socialization of the travelling experience entails an opportunity to promote the company when it has met or exceeded the expectations of its clients, but at the same time there is the risk of defamation, in the case of an experiential product that does not fulfil its visitors' expectations.

From the marketing and management perspective, the aspects of interaction and network creation are important. Until today, only the well-organized businesses have developed strategic partnership networks with large companies, local enterprises and institutions of the region. However, in general, research has shown a lack of cooperation in the field of experiential tourism at all levels (national, regional and local). A high quality experiential product and service, through information sharing and synergies, requires an efficient cooperation of all stakeholders involved in tourism. In particular, collaborations between the public and the private sector would maximize the touristic benefit.

Despite the fact that experiential tourism feedbacks to the community welfare, the dominance of mass tourism, and therefore the easy economic benefit, prevent locals to realize the importance of this tourism model. So, most of the locals are positive but not supportive to the existing experiential tourism businesses.

A major problem pointed out by the interviewees is the lack of a clear legal framework for the creation and implementation of strategies for experiential cultural tourism at all levels. Especially, the anachronistic tourism legislation in combination with the lack of strategic planning and clear content definition inhibits the development of experiential tourism activities and businesses. This implies bureaucratic delays and tax problems, especially to small tourism enterprises. This is partly due to the fact that mass tourism is still dominant in the tourism sector, so, the government has yet to develop a complete action plan for alternative forms of tourism, such as experiential tourism. The lack of necessary public infrastructures further complicates the planning and organizing practices for a tourism enterprise. Last but not least, in rural and remote areas, there is a lack of local, trained staff, so it is difficult for the businesses to develop.

In the graph below we summarize the specifics of the tourism enterprises and the main problems and needs raised by the present research.



The field study has shed light not only on the specifics of the experiential tourism enterprises, but also on the risks related to such activities. Firstly, all the aforementioned facts clearly manifest that experiential tourism is still a new field in the tourism industry in Greece. This means that the development of a new activity, where there is not even enough knowledge about it, requires a careful plan and combination of many factors and dimensions. Secondly, the absence of a strategical framework that defines responsibilities, management and marketing practices, cooperation between public and private sector poses the risk of an unequal development of the experiential product with negative results for the local community. For instance, unequal distribution of financial benefits to members of the community, local life disturbances and increase in the living costs of locals are some of these negative results. Thirdly, unpredictable, unforeseen or urgent conditions, such as the Covid -19 pandemic, always increase the risk of developing tourism businesses, and especially when there is not a complete strategic plan. In order to reduce business defamation risk due to low quality, it is necessary to impose a quality control or quality certification of the offered product in tourism enterprises.

3. Consumers' attitudes and perceptions related to culture- and heritage-based experiential tourism

3.1. Profile of the consumers' survey

The consumers' survey was based on an on-line questionnaire and aimed at assessing the consumer attitudes, perceptions, behaviour patterns and decision-making factors related to participation in this type of experiential tourism activities. The purpose of this survey was to shed light on the expectations that consumers have from the culture and heritage-based experiential tourism and thus allow policy makers and tourism managers to use these insights in order to further improve the characteristics of tourism product/services that would in return allow the consumers to receive surveys of improved value and furthermore have memorable and meaningful travel experiences.

The questionnaire consisted of two main parts. The first included three multiple choice questions allowing the option for more than one answers. The purpose of this part was to capture insights to the purpose of travelling, on the resources that people prefer to use when planning a trip; and on which heritage-based and cultural-based activities they choose to participate in during their visit. Most of the participants chose at least two answers for each question of this type thus allowing us to receive a rich corpus of answers, useful for getting a better understanding of their perceptions and preferences. The second part included eleven 5-point Likert scale questions where the participants were asked to reply on their preferences regarding the organization of their travelling and their preferred destinations and activities during the staying at the destination.

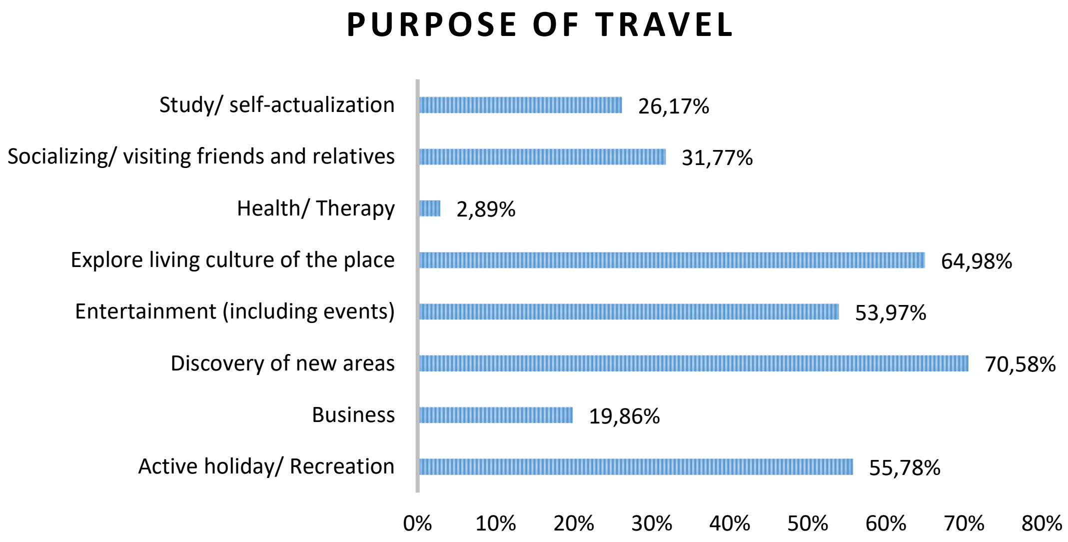
The questionnaire was distributed in parallel both into Greek and English language thus allowing also non-Greek speakers to participate. The questionnaire was disseminated from the members of the research through social media, via email but also through personal messages. The survey was conducted electronically using google forms from the 22nd of December 2020 to the 11th of January 2021. A total of 554 questionnaires were completed (117 in English and 437 in Greek). In terms of the demographics of the sample, over two-thirds of people surveyed were women (about 70%). The majority of the participants aged between 19 - 35 years (about 60%). In the table below we summarize the demographics of the sample of the survey in terms of the place of origin. Out of 346 replies coming from the BSB region of Central Macedonia and Eastern Macedonia and Thrace, 297 of them come from participants coming from the regions' largest city, Thessaloniki.

Demographics of the survey: Place of origin

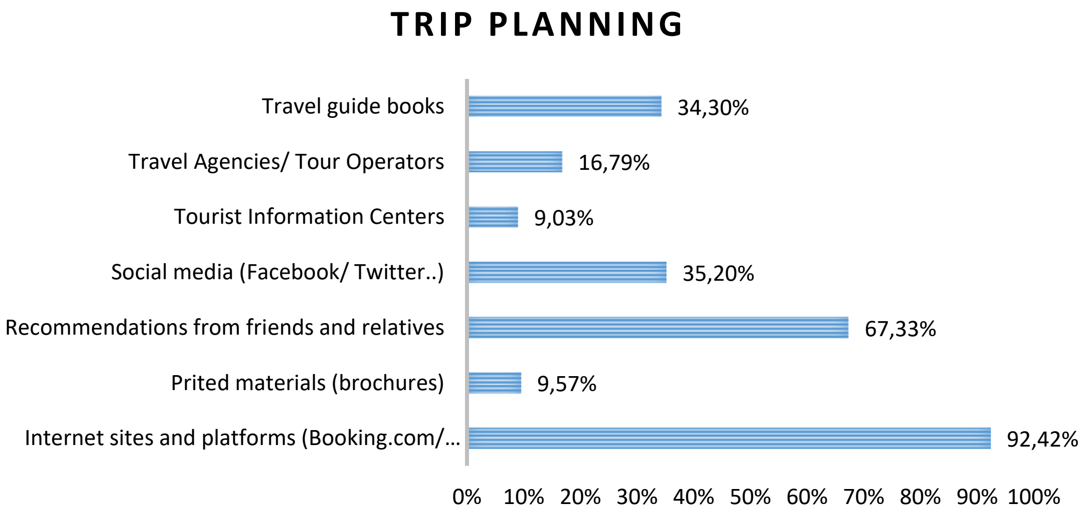
	BSB Region	Rest of Greece	Greece / not specified	Other countries	Total
Responses	346	146	44	18	549
Percentage	63%	21%	8%	3%	100%

3.2. Main findings and issues raised

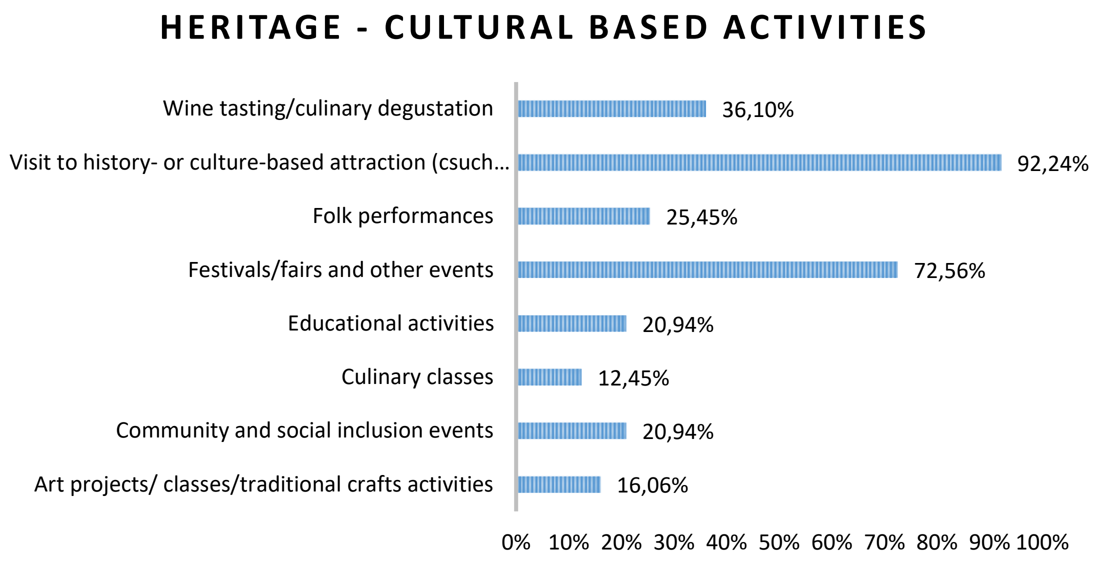
Regarding the question "What is usually your purpose of travelling?", over two-thirds of the participants mainly travel to discover new areas and to explore the living culture of a place. More than half prefer active holidays – recreation and entertainment. A significant number of the responders like travelling for socialising or visiting friends and relatives and for studying and self-actualisation (over 30% and about 26% respectively). About 20% said that the purpose of travelling is, among others, for business, while only a small number (only 16 of total – give percentage) travel for health or therapy reasons.



On the second question "What resources do you use when planning a trip?" the vast majority of the participants (about 93%) uses internet sites when planning a trip while about two-thirds ask for recommendations from friends and relatives. Nearly a third uses social media and travel guidebooks for planning. Only a few rely on travel agencies or tour operators, and even fewer, use tourist information centres or printed materials, brochures, etc. (around 9% each).



In response to the third question, regarding the heritage and cultural-based activities that consumers would like to participate in during their visit, more than 92% of the responders during their journey, visit galleries, historic parks and / or ancient monuments in order to experience the culture of the place. Almost three-quarters of the survey participants take part in festivals, fairs and other similar events and a quarter participates in folk performances. More than a third are interested in wine tasting and culinary degustation, while 12% take part in culinary classes. About a hundred responders (21%) participate in community and social inclusion events. Finally, a significant number (16%) prefer educational activities and art projects, classes, or traditional craft activities. It is worth noting that five people added local architecture and old city centres with traditional architecture as part of their cultural-based activities.



At the second section of the questionnaire, the answers of the 5-point Likert scale questions are briefly as follows:

More than one third (35%) of the responders said that they always plan every aspect of their trip, while 20% does that sometimes. On the contrary, about 40% does not often organise their holidays in advance, while only 6% never plans their journey. The vast majority of the survey participants prefer to travel seldom, rarely, or never with an organised group (77% combined). Only 8% visits new destinations as members of an organised group to minimise possible risks.

Nearly two-thirds of the responders like adventures and would always or sometimes experience something new every time they travel. Only a small number of the participants (11% in total) stated that they rarely or never do something new during their journey.

During travelling, over half of the survey participants enjoys experiencing new tastes and traditional local cuisine. A quarter said that sometimes, they like tasting new flavours. Only two persons said that they never experiment with new food in the places they visit. 80% of the participants consider that it is important to communicate with locals and become part of their routine in order to meet the culture of a new place. A small number (4%) said they never meet local people to experience any aspects of their everyday life.

Regarding the responder's preference to participate in various invigorating/stimulating activities during their stay, nearly a quarter always takes part in these, 28% of them sometimes like to participate in this kind of activities, while over a third replied that they rarely or seldom follow. Only a very small percentage (3%) of responders avoids participating in stimulating activities during their journey.

Regarding the traveller's interest in visiting heritage and cultural sites almost half of the responders expressed considerable interest in visiting such places. Moreover, a 30% of the participants sometimes visits a historical or cultural place during their travel, while only four people (1%) show no interest. Although nearly 80% of the people questioned are keen on visiting heritage and cultural sites, the majority (57%) does not enjoy taking part in a traditional event during their journey. Only a 17% is willing to participate in such events. Over half of the responders are sceptical on whether technologies and innovations (such as digital tours) can bring value to their experience.

Finally, regarding the willingness of the travellers to pay more for meaningful and enriching touristic experiences and to sacrifice their comfort or convenience in order to acquire memorable and enriching experiences, half of the participants would accept an additional charge and would lose their comfort in exchange for unforgettable travel experiences, whereas the other half would not proceed with that idea.

The survey results presented above highlight some important aspects that allow to further improve our understanding regarding the consumers' attitudes and perceptions related to culture- and heritage-based experiential tourism:

- In terms of the purpose for travelling, most people travel to discover new areas, explore the living culture of a place but also engage in active holidays and recreation. This signifies the importance of having a "winning mix" in the touristic offering of a destination / experience by combining three factors: a) new places, b) living culture and c) recreation.
- Travellers prefer to plan their trip online and also based on recommendations from their inner trusted cycle. Given the high number of people using the web, it becomes clear that any destination, in order to be visible to potential tourists, needs to have an online presence capable of attracting visitors. Although touristic info centres and brochures are the least favourable ways to attract visitors we see that these remain to be often the choice especially from the state or local organizations. Besides the web, people do not see much value in using technologies for improving a visitor's experience (eg. digital tours). Here, we could presume that technology is not, (yet) part of the travel experience itself and that a digital tour cannot replace a live visit.
- People seem to prefer visits to the traditional (and "typical") places of cultural heritage interest like monuments, museums and galleries and to festivals and fairs instead of participating in culinary or arts and crafts classes. Although most of them are interested

in visiting heritage and cultural sites they are not necessarily interested in participating in local / traditional events.

- When travelling, most of the visitors do not organize all the exact aspects of their travel and holidays in advance; neither they prefer to travel as members of a touristic group. On the contrary, they do like adventures and would like to experience something new every time they travel. They are also open in tasting new food, in meeting local people and in participating in various invigorating/stimulating activities during their stay in the place of their destination.
- Overall, the participants seem to be willing to pay more to have a meaningful and enriching touristic experience and also willing to sacrifice their comfort and convenience in order to acquire memorable and enriching memories. Finally, we need to underline the fact that, based on our descriptive analysis, the results do not seem to differ based on the sex of the respondents or based on the age group to which they belong. Especially for the second dimension, although the numbers of the replies are different their order interestingly, remains the same across all the different age groups.

4. Sustainability and Innovation

In general, alternative types of tourism are perceived as a response to the exploitation of the resources associated with mass tourism, which provide greater opportunities for destinations' sustainable development.

Regarding the BSB-GR region, the research highlighted the dominance of small tourism enterprises (STEs) in the experiential tourism sector. Therefore, concerning environmental sustainability, it can be assumed that STEs have the potential to play a major role in helping destinations progress towards sustainability objectives. This is justified by the fact that small – scale and locally owned tourism businesses do not exert excess pressure on the environment by diverting resources, such as water, away from the local community, by being massive pollutants or destroy natural vegetation and disrupt wildlife. However, such a one-way assumption that small-scale, locally owned businesses are equivalent to sustainable development has been stridently questioned, as a poorly operated small-scale tourism business in a wrong location could be just as harmful and non-sustainable as a single large one.

In the context of environmental sustainability, during the last years, accommodations in the BSB-GR region have adopted environmentally friendly policies and strategies in their activities in order to achieve low carbon footprint. Furthermore, many of the developed experiential activities are related with rural and agricultural experiences and therefore potentially can be considered that contribute to a sustainable or balanced development and promotion of local agricultural, social and economic resources. In addition, incorporating environmental awareness and management in the experiential tourism industry would be a step towards ensuring the implementation of environmental policies and legislation in, also, mass tourism enterprises.

The experiential tourism activities that are being developed in non-basic historical landmarks and places of the BSB-GR region could channel visitor flow to areas that may not independently interest visitors, thus alleviating pressure on “mass tourism” sites; motivating heritage conservation and reducing intraregional inequalities by providing socio-economic, cultural, and environmental benefits to disadvantaged localities.

In an economic sense, the term sustainability is, also, associated with business’ sustainability. More specifically, the majority of the interviewees indicated that the shift in experiential activities and, generally, in alternative forms of tourism is the only way for tourism diversification and survival in the global competitive tourism market.

A strategy of competitiveness of the BSB-GR region, requires an innovation management. Innovation as described by interviewees is a unique mix of resources, emphasizing in the unknown, attractive distinctiveness of the BSB-GR region, that can be used for the development of an innovative tourist product, which will have a form of module consisting of activities that originally belong to various tourism types: rural, gastronomic, cultural, etc. Such a product should offer unexpected pleasures to tourists meet their excitement needs and induce emotions that will tie them to the destination and motivate them to come again and/or prolong their stay.

Innovation is perceived by BSB-GR region stakeholders as “*a different road than the one followed by competitors*”. The field research highlighted that in order to create such a tourist product, it is necessary to build trust among different public and private players that deliver different parts of the innovative tourist module. In other words, such a complex product requires a plethora of ingredients experienced over time, and it is therefore impossible to have a single player who has the control over everything. Furthermore, the research indicates that tourism businesses need creativity in order to enhance the tourism experience and provide tourist destinations with a unique atmosphere. Hence, implementing creative ideas, ultimately leads to innovation. According to the interviewees, new technologies, also offer opportunities for developing innovative tourism products.

Finally, among the existing experiential tourism enterprises in the BSB – GR region, some of them have been awarded for their innovative activities, while others have been implementing innovative technological practices. However, the innovative behavior of tourism companies remains limited.

5. Conclusions: Opportunities and implications for action

The Regions of Central Macedonia and Eastern Macedonia and Thrace (BSB-GR regions) are two regions with rich history, wealth of natural resources, many important historical monuments, and population with vivid and diverse cultural background. Thus, the BSB-GR region possesses all the ingredients, both tangible and intangible, that could be utilised to create and offer remarkable experiences for the visitors and many opportunities for the development of experiential tourism. The BSB-GR region already has a well-established touristic profile based primarily on mass tourism. However, as the filed survey of the present research project has shown, an alternative form of sustainable tourism could further support the economic, social, and environmental development not only of the regions themselves, but for the broader area and the country itself as well. As an interviewee stated:

> *"The economic and social conditions of the pandemic create the need of an alternative form of tourism, the need of offering "the experiences". You cannot survive otherwise. Sustainable development is essential, otherwise you become a commodity. In order to have returning visitors, it is necessary to adapt to the new form of tourism. Experiential tourism could be the new trend for any place."*

The majority of the interviewees indicated that the COVID-19 pandemic, although typically seen as a problem, can also turn into an opportunity for development. They also mentioned that after the pandemic, the criteria for selecting a destination might change. As the issue of social distancing will be essential and given that health protocols are expected to change, less touristic destinations might be preferable to visitors. The effects of the pandemic are expected to impact severely to mass tourism, to such extent that the existing modus operandi might not be effective anymore. The tourism structure would thus need to be reconstructed, following the rules the "new normality" will impose. To this end, a review of the legislative framework to facilitate the development of experiential tourism appears as a necessity. It is important that, after the pandemic crisis, tourism is expected to offer higher quality products of that will provide added value to all stakeholders, including visitors and the local community. However, reshaping the tourism model will definitely be time consuming and will cause periods of uncertainty, especially short term.

An important factor that would also create an opportunity for the experiential tourism development is the cross-border cooperation. Regarding the intangible resources, the regions of Macedonia and Thrace have a very rich variety of customs and traditions and it is worth mentioning that some of them survive in the wider area too. The experiential tourism would also assist in collaboration between touristic companies and local producers in order to support the local community.

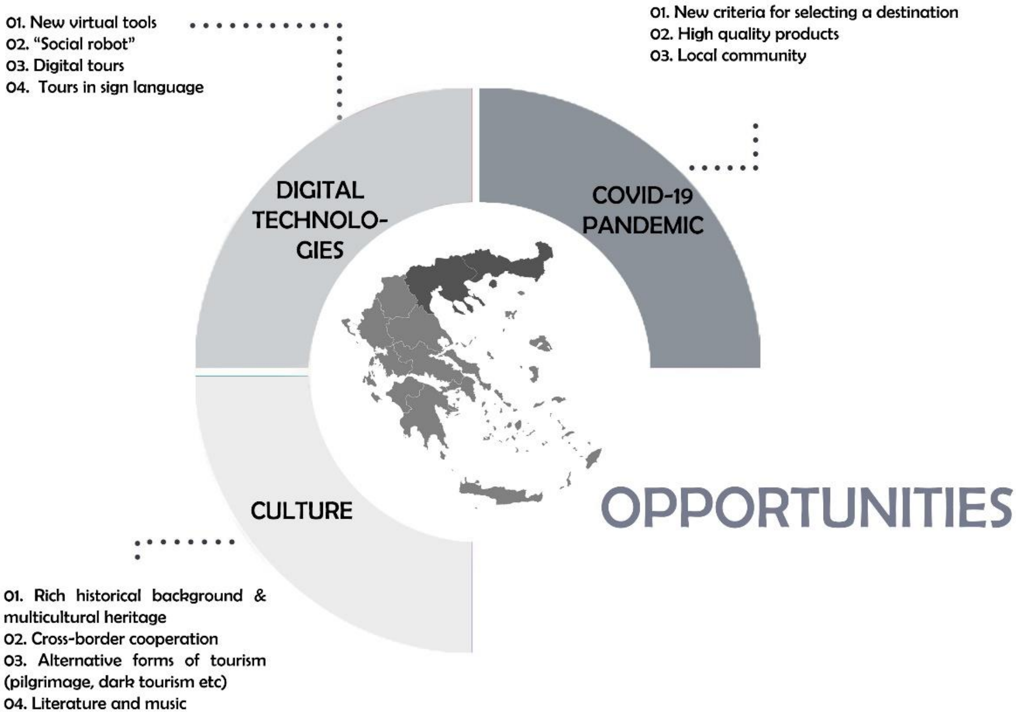
Regarding digital technologies, a great number of the participants in the survey report that digital technologies enable a new area of development for the experiential tourism. Digital technologies seem to allow the offering of differentiation and also enrich the visitors' experience using virtual tools. Some of the examples reported in the interviews are the following:

- "Social robot" that talks to visitors through artificial intelligence and gives personalised information.
- Digital tours in the modern city and virtual tours in the ancient city e.g., walking in the streets of the ancient or Byzantine Thessaloniki.
- Tours in sign language for people with hearing problems.

A great number of opportunities and implications for action are created as a result of the rich culture and heritage of the BSB-GR regions. Through discussions with the various public institutions (ex. Ephorate of Antiquities and the Archaeological Museum of Thessaloniki), a number of proposals have been made regarding the development of the experiential tourism, such as the simulation of an excavation, role-playing games, a "night at the Museum", revivals of ancient practices and so on.

The rich historical background and multicultural heritage in the multiple places of the BSB region offers opportunities attractive to many types of visitors. Special opportunities for experiential tourism are traced in the urban settings, where an interesting approach would be the organisation of themed walks in the city adjusted to the participant's interests. For example, in Thessaloniki (or Veroia), these could include walks of pilgrimage tourism for visitors from Israel, who would like to experience the history of the Jewish community in of the city, or city walks highlighting the ancient, byzantine or ottoman past. Other alternative forms of tourism could be developed, like dark tourism, utilising the historical cemeteries of the cities or a famous historical prison (like Yedi Koule in Thessaloniki which has been turned into a museum, etc.) Most cities and towns have a rich impact in the literature and music, forms of literary or musical tourism could be further developed. For example, touristic products for book lovers could include tours in city paths that a book hero has walked in. In a similar way, musical tourism in Thessaloniki, for example could include ideas for a "rebetiko" (which has now been described as an intangible resource protected by UNESCO) walk in the city where participants would visit places with a historical significance for the flourishment of this music genre.

All the above indicate the wide range of opportunities in heritage- and culture- based experiential tourism in the entire Black Sea Basin region in Greece. The graph below summarizes the opportunities for the development of experiential tourism in the BSB-GR region.


01. New virtual tools
02. "Social robot"
03. Digital tours
04. Tours in sign language
01. New criteria for selecting a destination
02. High quality products
03. Local community
DIGITAL TECHNOLO-GIES
COVID-19 PANDEMIC
CULTURE
OPPORTUNITIES
01. Rich historical background & multicultural heritage
02. Cross-border cooperation
03. Alternative forms of tourism (pilgrimage, dark tourism etc)
04. Literature and music

Project funded by EUROPEAN UNION

PRO EXTOUR

Black Sea CROSS BORDER COOPERATION

ACKNOWLEDGMENTS

We are thankful to the following public and private bodies and companies for their participation in the qualitative questionnaire research and their substantial contribution to the understanding of the needs and prospects for the promotion of Heritage- and Culture-based Experiential Tourism in the Greek Black Sea region (Regions of Central Macedonia and Eastern Macedonia and Thrace).

GOVERNMENT - PUBLIC ORGANIZATIONS		
1. Ministry of Tourism	Dionisopoulou Panayiota, *Head of the General Directorate of Tourism Policy*	Athens
2. National Organization for Tourism (EOT)	Lazaridou Sophia, *Head of General Directorate of Administration, Organization and Promotion*	Athens
3. Region of Central Macedonia, Tourism Directorate	Kiskinis Andreas, Rapporteur	Thessaloniki
4. Archaeological Museum of Thessaloniki	Tsougaris Charis, *Department of Exhibitions, Communication and Education AMTH, Head of educational programs*	Thessaloniki
5. Folklife & Ethnological Museum of Macedonia - Thrace	Bintsi Eleni, *Head of Management*	Thessaloniki
6. Ephorate of Antiquities of Halkidiki and Mount Athos	Polyzoudi Archontia, Mertzimekis Nikolaos, *Archaeologists*	Poligiros, Chalkidiki
7. Ephorate of Antiquities of Drama	Poulioudi Vasiliki, *Deputy Head of the Ephorate of Antiquities of Drama, Head of the Department of Prehistoric and Classical Antiquities and Museums of EFA Drama*	Drama
8. Rodopi Mountain Range Management Body	Psaltopoulos Paschalis, *Environmentalist-Cartographer*	Mesochori
9. Tourism Office of the Regional District of Imathia	Andreadou Maria, *Rapporteur*	Veria

PRIVATE BODIES AND ENTERPRISES		
10. Greek Tourism Confederation (SETE)	Karagkouni Aggeliki, *Content Manager*	Athens
11. Helenic Hoteliers Federation	Tasios Grigoris, *Chairman*	Halkidiki
12. Dot2dot	Kartsiakli Vasiliki, *Founder - Research and design of tours*, Vraka Christina, *founder - business administration, organization and marketing*	Thessaloniki
13. "Paizontas se paradosiaka monopatia", Workshop "Playing on Traditional Paths"	Pikoula Varvara, *Founder*	Thessaloniki

14. Ziogas Western City	Ziogas Christos, Owner - *Riding instructor*	Leukochori, Thessaloniki
15. Veroia Volta – discover Veria	Nazlidou Mary, *Co- Founder*	Veria
16. Ktima Kyr Gianni	Palamida Elpida, *Visitors Executive*	Naousa
17. Wine Museum Gerovassiliou	Leivadioti Magdalini, *Museologist, Event Executive*	Thessaloniki
18. TRIGIRO	Amanatidou Niovi, *Co-founder*	Naousa
19. Epiculiar Tours	Makris Thanasis, *Executive Consultant*	Thessaloniki, Athens
20. Travel agent Miltos Kesoglou	Kesoglou Miltos, *Travel Agent*	Thessaloniki
21. The estate in Bairi	Konstantinos Giantsis, *Owner*	Kilkis
22. Kapsali Farm	Kapsali Maria, *Owner*	Veroia
23. Traditional guesthouse of Demosthenes	Mouzouris Dimitris, *Owner*	Kilkis
24. Alexandrou Traditional Guesthouse	Alexandrou Dimitris, *Owner*	Halkidiki
25. Hotel Nemesis	Tseggelidis Ioannis, *Owner*	Xanthi
26. Karaiskos Farm	Andrinos Meletios, *Reservation Manager*	Pelion

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Appendix I. Economic indicators and tourist activity

Gross Domestic Product per Regional Unit		
BSB-GR	2018 (€ mil.)	Share in the Region's GDP
Eastern Macedonia & Thrace	**6,873**	**100.00%**
Evros	1,791	26.06%
Xanthi	1,085	15.79%
Rodopi	1,155	16.81%
Drama	1,001	14.56%
Thasos, Kavala	1,840	26.77%
Central Macedonia	**24,607**	**100.00%**
Imathia	1,588	6.45%
Thessaloniki	15,774	64.10%
Kilkis	901	3.66%
Pella	1,646	6.69%
Pieria	1,451	5.90%
Serres	1,720	6.99%
Chalkidiki	1,527	6.20%
Data Source: EL.STAT., 2021		

Gross Domestic Product Per Capita in Eur.	
BSB-GR	2018 (€)
Eastern Macedonia & Thrace	**11,446**
Evros	12,154
Xanthi	9,713
Rodopi	10,416
Drama	10,340
Thasos, Kavala	13,770
Central Macedonia	**13,125**
Imathia	11,221
Thessaloniki	14,273
Kilkis	11,193
Pella	11,968
Pieria	11,015
Serres	10,251
Chalkidiki	13,806
Greece	**16,745**
Data Source: EL.STAT., 2021	

Gross Value Added									
BSB-GR	2018 (€ mil.)			Share (%)			Rate of Change 2010-2018		
	primary sector	secondary sector	tertiary sector	primary sector	secondary sector	tertiary sector	primary sector	secondary sector	tertiary sector
Eastern Macedonia & Thrace	**493**	**1.143**	**4.320**	**7,50%**	**4,81%**	**3,44%**	**-5,74%**	**-26,55%**	**-28,01%**
Evros	112	176	1.265	1,70%	0,74%	1,01%	-12,76%	-29,48%	-26,46%
Xanthi	78	182	681	1,18%	0,77%	0,54%	-4,56%	-37,32%	-32,75%
Rodopi	89	290	622	1,35%	1,22%	0,50%	-5,45%	-0,81%	-35,56%
Drama	93	211	563	1,42%	0,89%	0,45%	-7,70%	-18,80%	-26,14%
Thasos, Kavala	121	284	1.189	1,85%	1,20%	0,95%	2,49%	-38,79%	-22,82%
Central Macedonia	**1.343**	**3.510**	**16.476**	**20,43%**	**14,76%**	**13,14%**	**-0,95%**	**-30,28%**	**-18,42%**
Imathia	250	270	856	3,80%	1,14%	0,68%	-15,79%	-27,96%	-22,67%
Thessaloniki	269	2.331	11.072	4,10%	9,80%	8,83%	8,58%	-29,20%	-19,63%
Kilkis	80	188	514	1,21%	0,79%	0,41%	-6,55%	-38,42%	-14,65%
Pella	323	229	874	4,92%	0,97%	0,70%	8,64%	-33,70%	-18,06%
Pieria	118	144	996	1,79%	0,61%	0,79%	-6,48%	-35,61%	-15,02%
Serres	201	197	1.093	3,06%	0,83%	0,87%	-5,76%	-25,90%	-15,88%
Chalkidiki	102	152	1.070	1,55%	0,64%	0,85%	14,75%	-33,55%	-8,76%
Greece	**6.576**	**23.771**	**125.434**	**100,00%**	**100,00%**	**100,00%**	**-1,82%**	**-28,82%**	**-20,43%**
Data Source: EL.STAT., 2021									

Employment									
BSB-GR	2018			Share, 2018			Rate of Change, 2010-2018		
	primary sector	secondary sector	tertiary sector	primary sector	secondary sector	tertiary sector	primary sector	secondary sector	tertiary sector
Central Macedonia	94.487	101.800	534.392	18,65%	17,01%	15,70%	-2,40%	-20,10%	-2,02%
Eastern Macedonia and Thrace	59.450	27.077	144.829	11,73%	4,53%	4,25%	-5,10%	-21,39%	2,28%
Greece	**506.641**	**598.301**	**3.404.164**	**100,00%**	**100,00%**	**100,00%**	**-6,90%**	**-20,48%**	**-0,17%**
Data Source: EL.STAT., 2021									

Arrivals in Tourist Accommodations (2012-2018)					
BSB-GR	2012	2018	Average Annual Rate of Change	Rate of Change	Average
Eastern Macedonia and Thrace	**446.384**	**674.734**	**7,13%**	**51,16%**	**595.247**
Drama	30.064	37.883	3,93%	26,01%	33.376
Thasos, Kavala	181.907	329.671	10,42%	81,23%	278.259
Evros	137.453	153.439	1,85%	11,63%	145.816
Xanthi	37.823	81.144	13,57%	114,54%	66.989
Rodopi	59.137	72.597	3,48%	22,76%	70.807
Central Macedonia	**1.954.631**	**2.691.440**	**5,48%**	**37,70%**	**2.387.653**
Imathia	43.899	46.477	0,96%	5,87%	47.782
Thessaloniki	894.738	1.323.263	6,74%	47,89%	1.168.161
Kilkis	11.499	12.381	1,24%	7,67%	13.636
Pella	44.575	46.349	0,65%	3,98%	45.735
Pieria	160.274	252.221	7,85%	57,37%	213.357
Serres	73.402	83.468	2,16%	13,71%	80.291
Chalkidiki	726.244	927.281	4,16%	27,68%	818.692
Greece	**14.790.696**	**22.307.735**	**7,09%**	**50,82%**	**18.660.228**
Data Source: EL.STAT., 2019					

Overnight Stays in Tourist Accommodation (2012-2018)					
	2012	2018	Average Annual Rate of Change	Rate of Change	Average
Eastern Macedonia and Thrace	**1.532.316**	**2.101.808**	**5,41%**	**37,17%**	**1.876.711**
Drama	17.8	81.822	2,84%	18,32%	72.255
Kavala, Thasos	788.742	1.271.909	8,29%	61,26%	1.081.435
Evros	416.498	368.120	-2,04%	-11,62%	393.183
Xanthi	92.525	167.553	10,40%	81,09%	134.198
Rodopi	165.399	212.404	4,26%	28,42%	195.640
Central Macedonia	**7.707.423**	**9.538.709**	**3,62%**	**23,76%**	**8.766.431**
Imathia	90.391	115.797	4,21%	28,11%	101.183
Thessaloniki	2.002.431	2.736.541	5,34%	36,66%	2.440.547
Kilkis	22.594	41.964	10,87%	85,73%	33.556
Pella	86.101	110.072	4,18%	27,84%	90.786
Pieria	860.630	1.287.624	6,95%	49,61%	1.104.478
Serres	146.451	148.052	0,18%	1,09%	164.689
Chalkidiki	4.498.825	5.098.659	2,11%	13,33%	4.831.192
Greece	**64.384.415**	**91.569.437**	**6,05%**	**42,22%**	**78.737.974**
Data Source: EL.STAT., 2019					

Tourist accommodation plentitude (%) (2012-2018)					
	2012	2018	Average Annual Rate of Change	Rate of Change	Average
Eastern Macedonia & Thrace	**29.8**	**36.2**	**3,30%**	**21,48%**	**33,8**
Drama	17.8	11.7	-6,75%	-34,27%	15,7
Kavala	20.1	39.8	12,06%	98,01%	33,8
Thasos	43.8	51.4	2,70%	17,35%	50,6
Evros	30.0	28.1	-1,08%	-6,33%	26,9
Xanthi	17.5	32.1	10,64%	83,43%	25,9
Rodopi	31.9	37.1	2,55%	16,30%	33,8
Central Macedonia	**42.2**	**47.1**	**1,85%**	**11,61%**	**45,5**
Imathia	20.8	25.8	3,66%	24,04%	22,3
Thessaloniki	42.2	54.4	4,32%	28,91%	49,4
Kilkis	9.3	13.4	6,28%	44,09%	12,9
Pella	16.8	22.7	5,14%	35,12%	17,9
Pieria	29.1	36.3	3,75%	24,74%	33,2
Serres	19.1	21.2	1,75%	10,99%	21,9
Chalkidiki	53.2	52.6	-0,19%	-1,13%	53,9
Greece	**43.2**	**52.7**	**3,37%**	**21,99%**	**48,6**
Data Source: EL.STAT., 2019					

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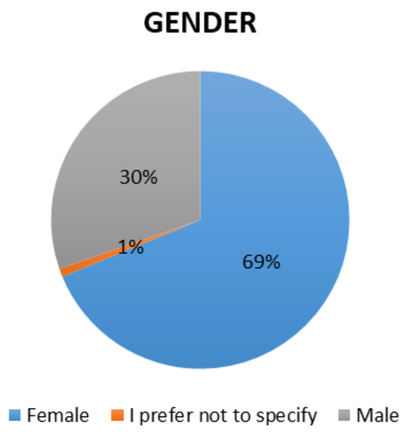
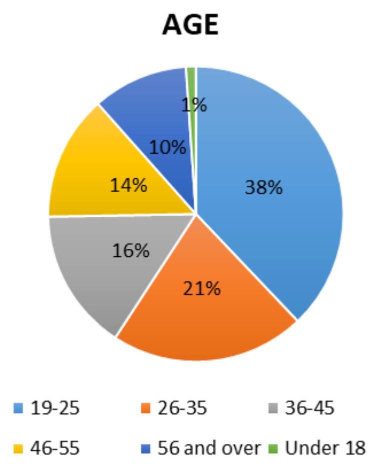
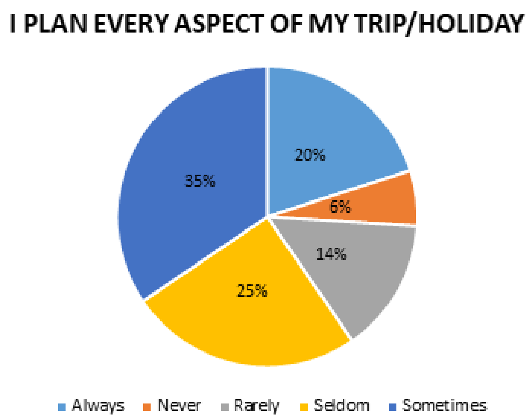
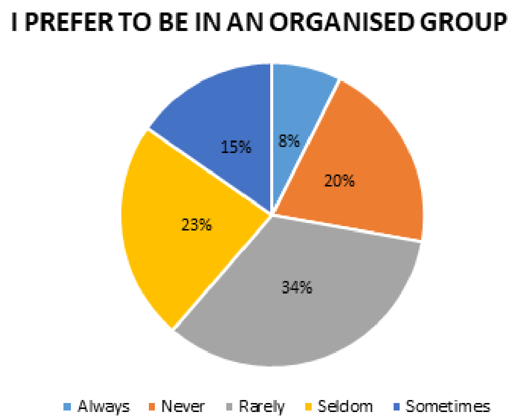
Distribution of incoming tourism revenues per Region		
Region	Distribution of incoming tourism revenues, 2019	Direct contribution of tourism to the GDP of the Region, 2019
South Aegean	29%	107%
Crete	20%	50%
Attica	15%	4%
Central Macedonia	**13%**	**12%**
Ionian Islands	11%	77%
Eastern Macedonia & Thrace	**2%**	**8%**
Pelloponisos	2%	7%
Thessalia	2%	5%
Ipeiros	1%	8%
Western Greece	1%	4%
Central Greece	1%	3%
Northern Aegean	1%	8%
Western Macedonia	0%	2%
Greece	**100%**	**13%**
Data Source: (INSETE, 2020a) (INSETE, 2020b)		

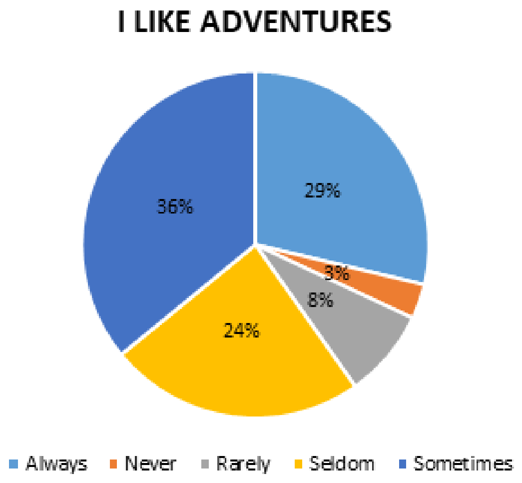
Appendix II. Analytical results of the consumers' survey

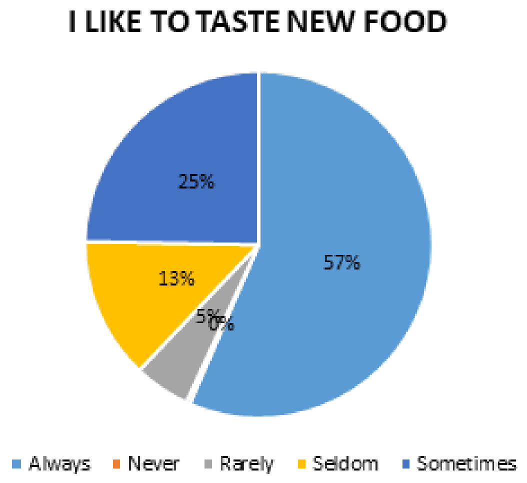


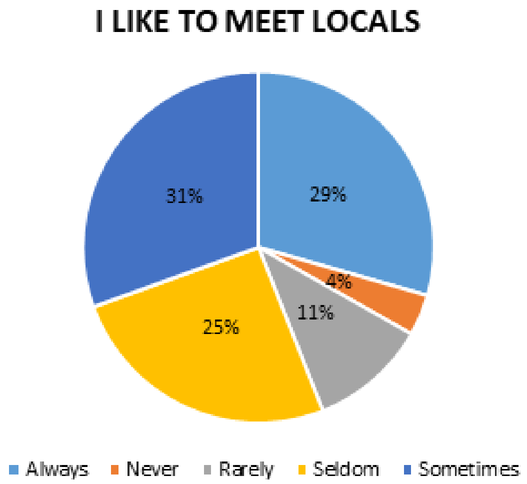


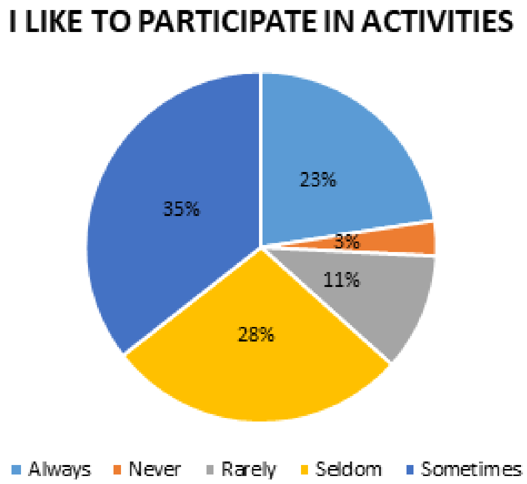




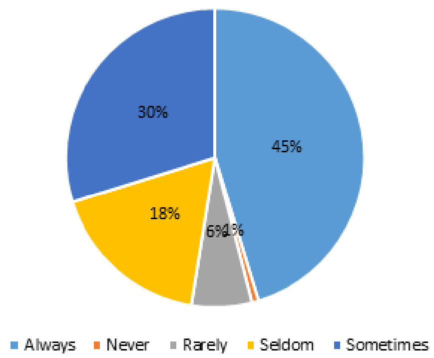

I LIKE ADVENTURES
29%
3%
8%
24%
36%
Always
Never
Rarely
Seldom
Sometimes


I LIKE TO TASTE NEW FOOD
57%
0%
5%
13%
25%
Always
Never
Rarely
Seldom
Sometimes

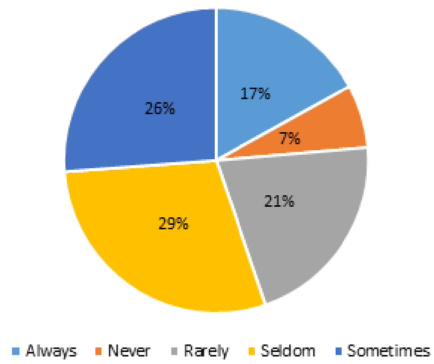

I LIKE TO MEET LOCALS
29%
4%
11%
25%
31%
Always
Never
Rarely
Seldom
Sometimes


I LIKE TO PARTICIPATE IN ACTIVITIES
23%
3%
11%
28%
35%
Always
Never
Rarely
Seldom
Sometimes

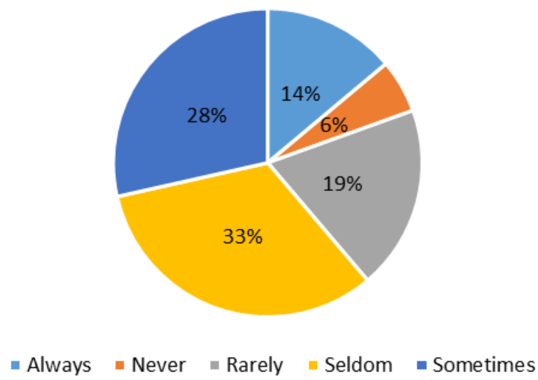
I AM INTERESTED IN VISITING HERITAGE AND CULTURAL SITES

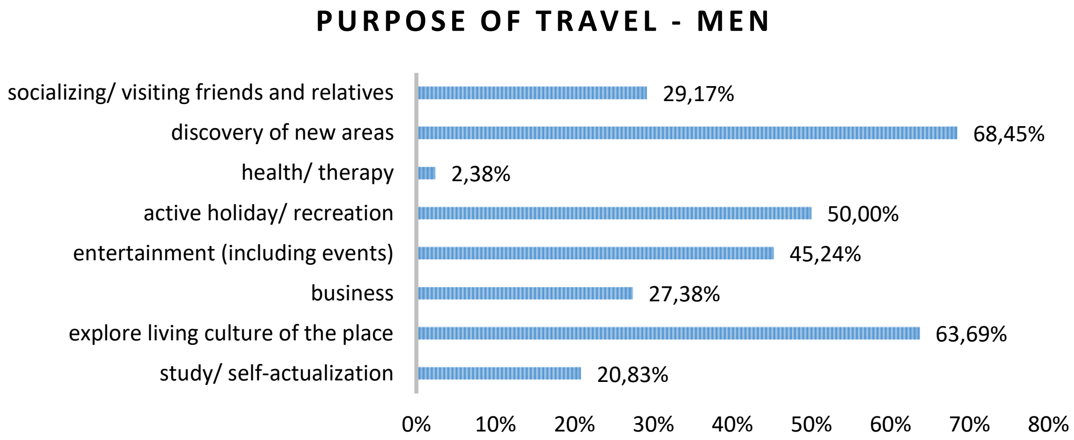


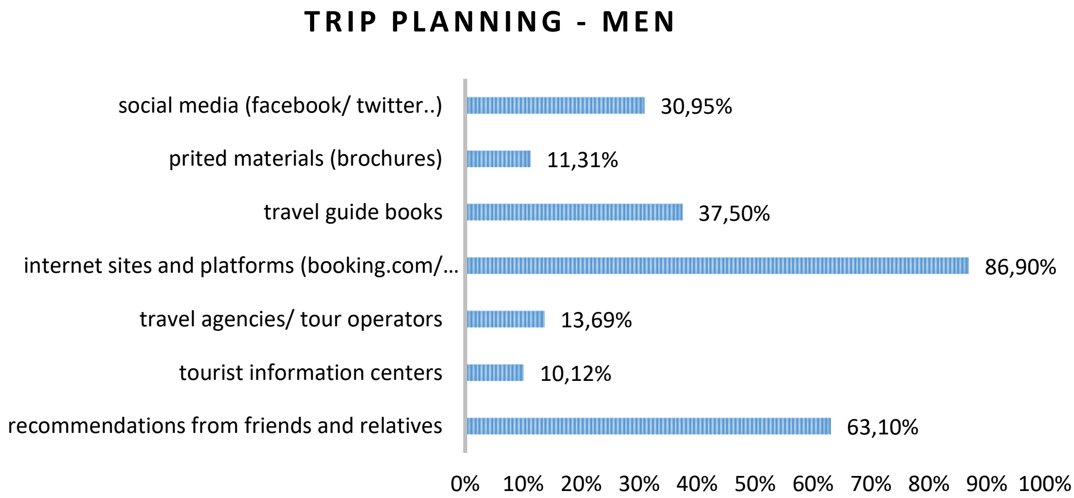
I LIKE TO TAKE PART IN A TRADITIONAL EVENT

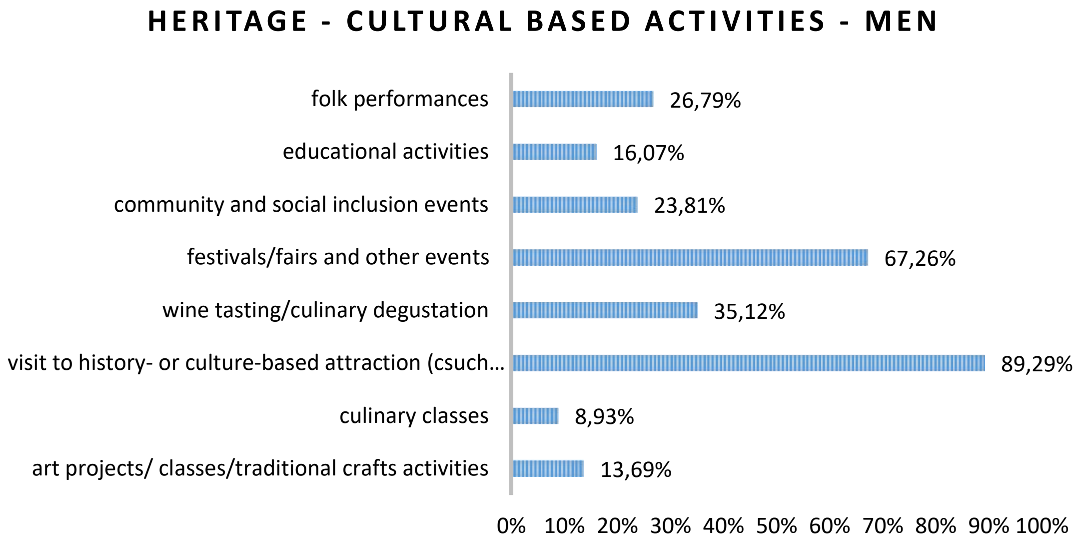


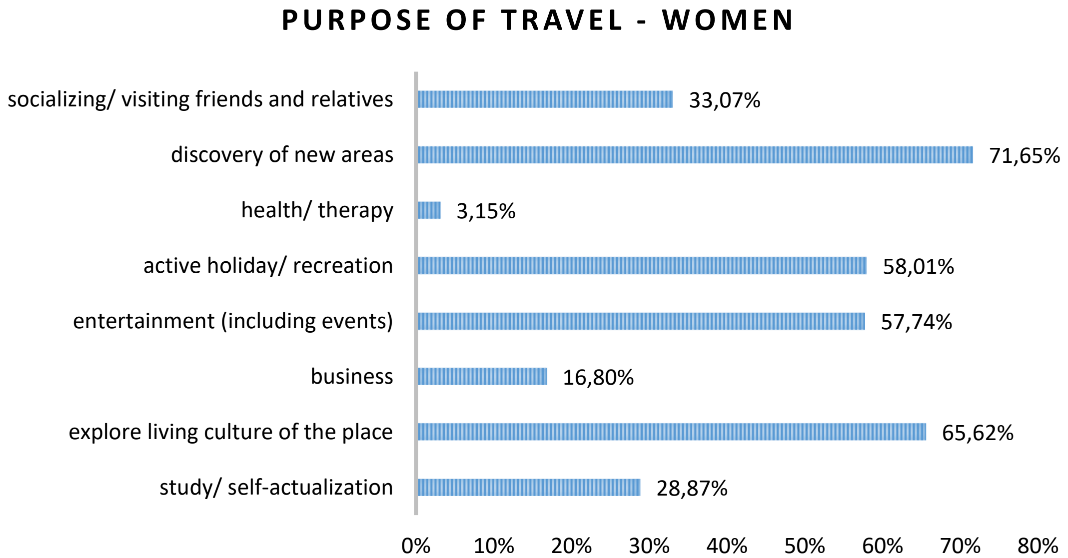
TECHNOLOGIES BRING VALUE TO A VISITOR'S EXPERIENCE

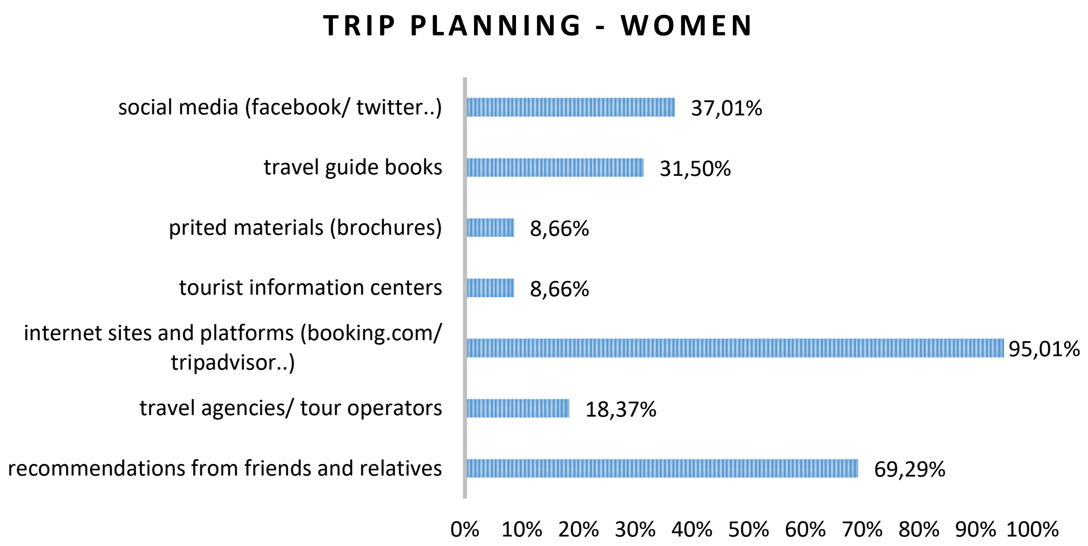


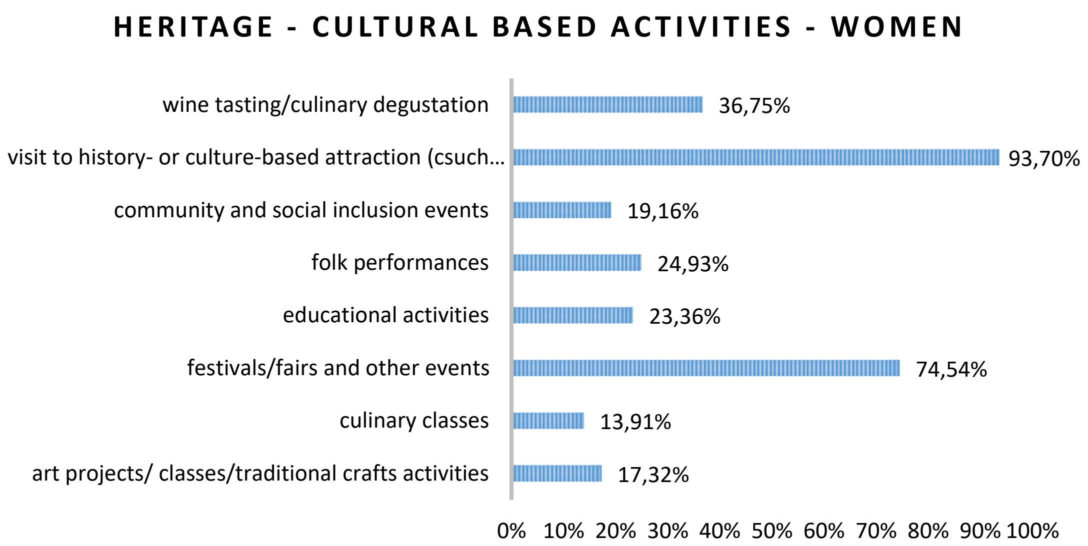

PURPOSE OF TRAVEL - MEN
socializing/ visiting friends and relatives
discovery of new areas
health/ therapy
active holiday/ recreation
entertainment (including events)
business
explore living culture of the place
study/ self-actualization
29,17%
68,45%
2,38%
50,00%
45,24%
27,38%
63,69%
20,83%
0%
10%
20%
30%
40%
50%
60%
70%
80%


TRIP PLANNING - MEN
social media (facebook/ twitter..)
prited materials (brochures)
travel guide books
internet sites and platforms (booking.com/...
travel agencies/ tour operators
tourist information centers
recommendations from friends and relatives
30,95%
11,31%
37,50%
86,90%
13,69%
10,12%
63,10%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

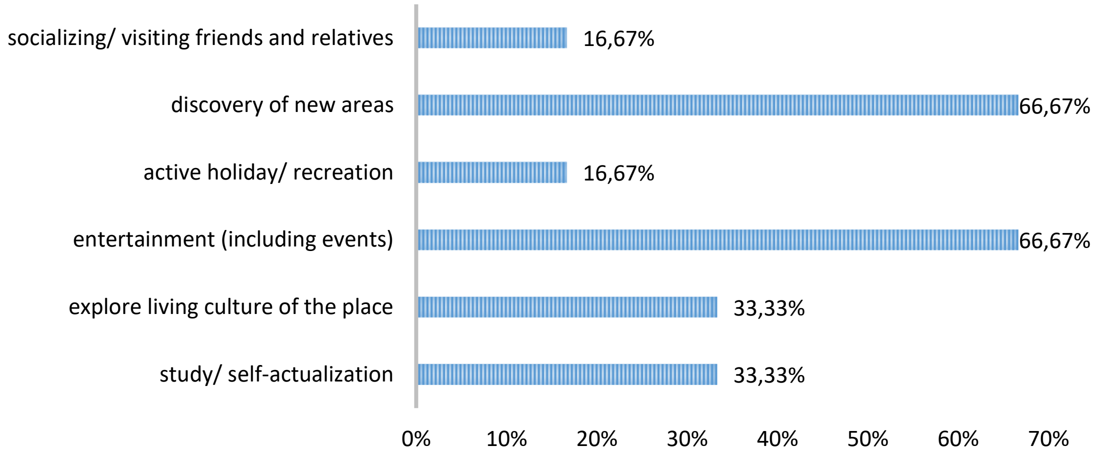

HERITAGE - CULTURAL BASED ACTIVITIES - MEN
folk performances
26,79%
educational activities
16,07%
community and social inclusion events
23,81%
festivals/fairs and other events
67,26%
wine tasting/culinary degustation
35,12%
visit to history- or culture-based attraction (csuch...
89,29%
culinary classes
8,93%
art projects/ classes/traditional crafts activities
13,69%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%


PURPOSE OF TRAVEL - WOMEN
socializing/ visiting friends and relatives
33,07%
discovery of new areas
71,65%
health/ therapy
3,15%
active holiday/ recreation
58,01%
entertainment (including events)
57,74%
business
16,80%
explore living culture of the place
65,62%
study/ self-actualization
28,87%
0% 10% 20% 30% 40% 50% 60% 70% 80%

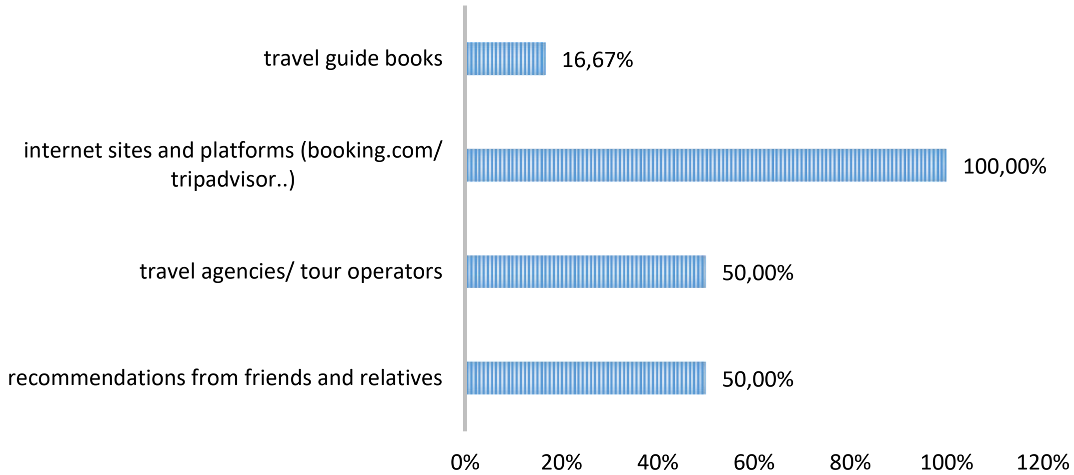

TRIP PLANNING - WOMEN
social media (facebook/ twitter..) 37,01%
travel guide books 31,50%
prited materials (brochures) 8,66%
tourist information centers 8,66%
internet sites and platforms (booking.com/ tripadvisor..) 95,01%
travel agencies/ tour operators 18,37%
recommendations from friends and relatives 69,29%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%


HERITAGE - CULTURAL BASED ACTIVITIES - WOMEN
wine tasting/culinary degustation 36,75%
visit to history- or culture-based attraction (csuch... 93,70%
community and social inclusion events 19,16%
folk performances 24,93%
educational activities 23,36%
festivals/fairs and other events 74,54%
culinary classes 13,91%
art projects/ classes/traditional crafts activities 17,32%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

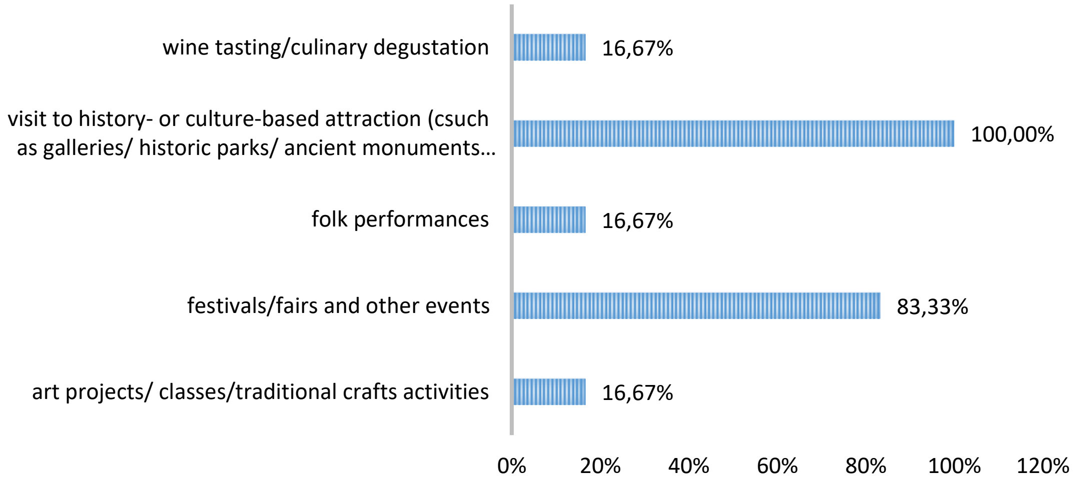
PURPOSE OF TRAVEL - UNDER 18



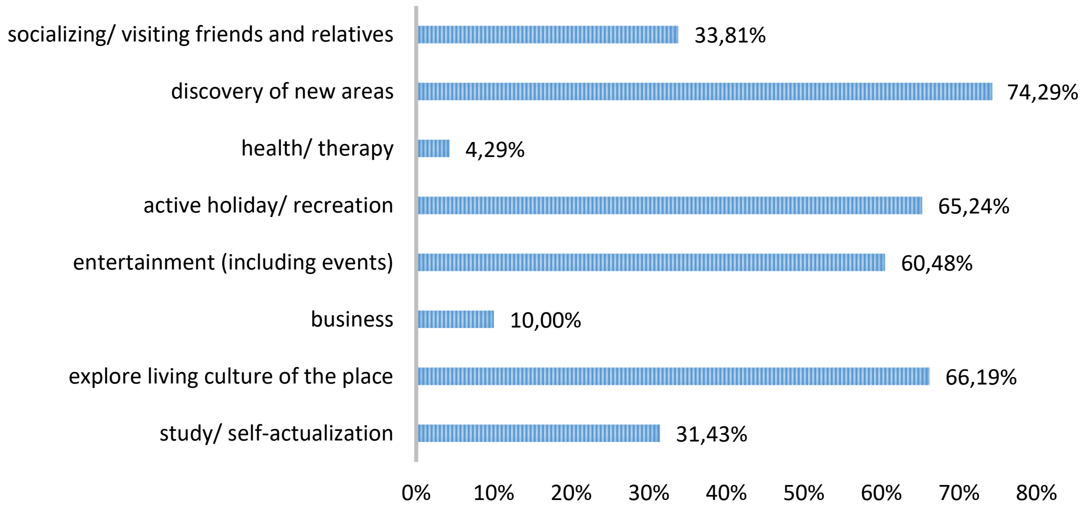
TRIP PLANNING - UNDER 18

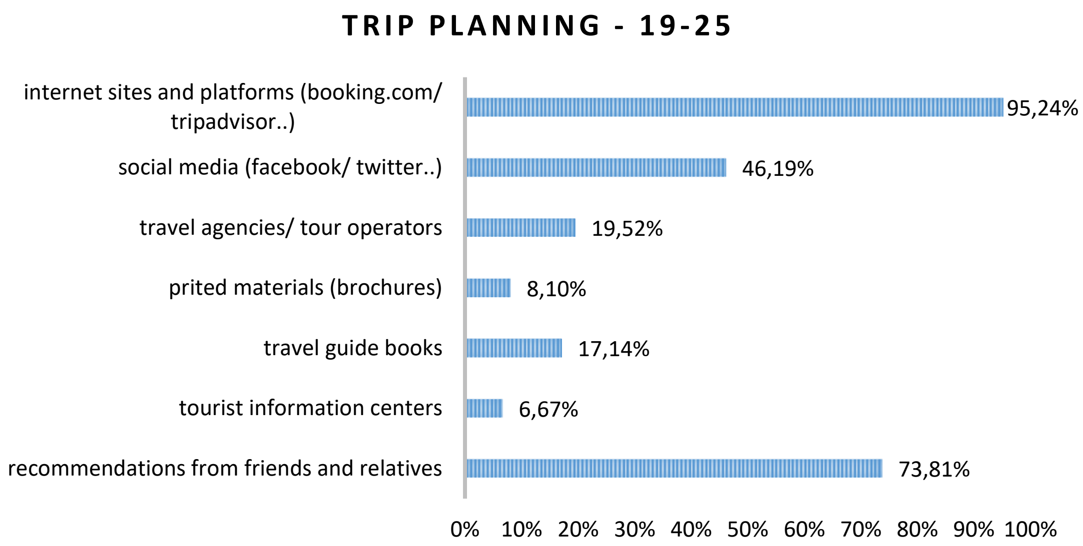


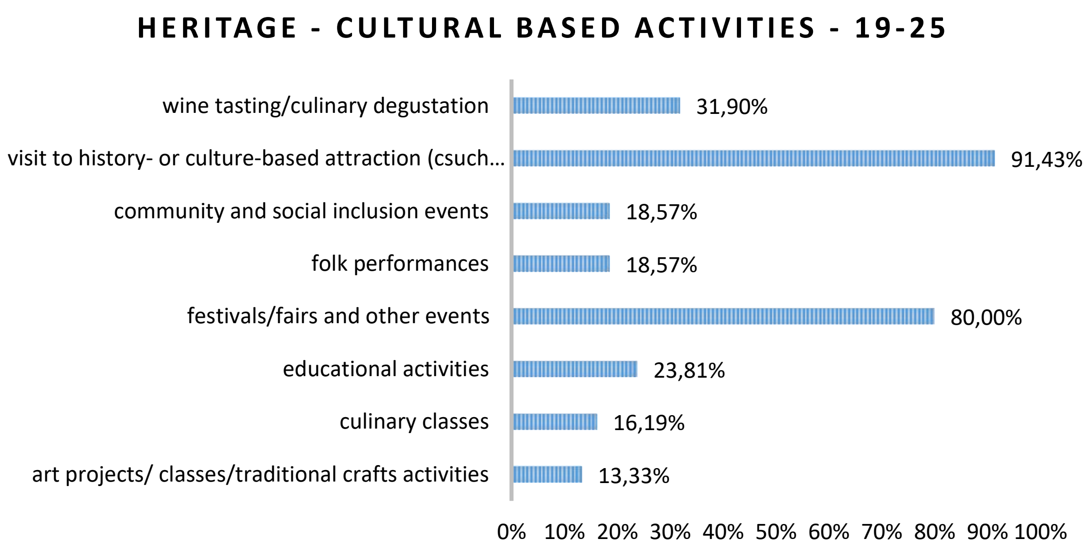
HERITAGE - CULTURAL BASED ACTIVITIES- UNDER 18



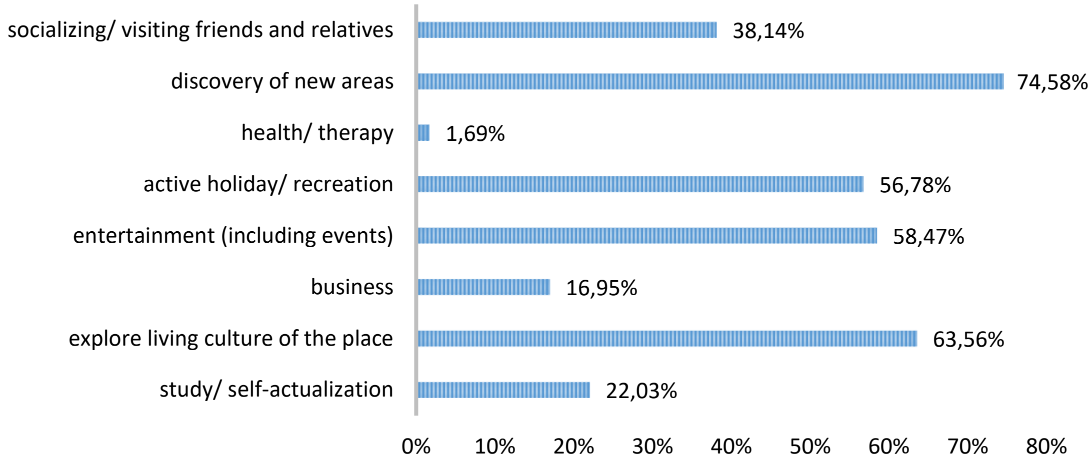
PURPOSE OF TRAVEL - 19-25



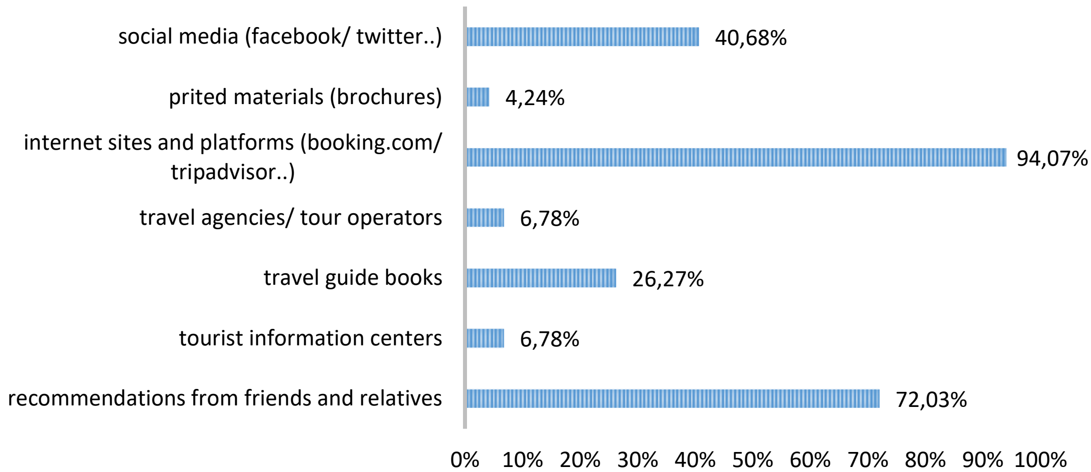

TRIP PLANNING - 19-25
internet sites and platforms (booking.com/ tripadvisor..)
social media (facebook/ twitter..)
travel agencies/ tour operators
prited materials (brochures)
travel guide books
tourist information centers
recommendations from friends and relatives
95,24%
46,19%
19,52%
8,10%
17,14%
6,67%
73,81%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

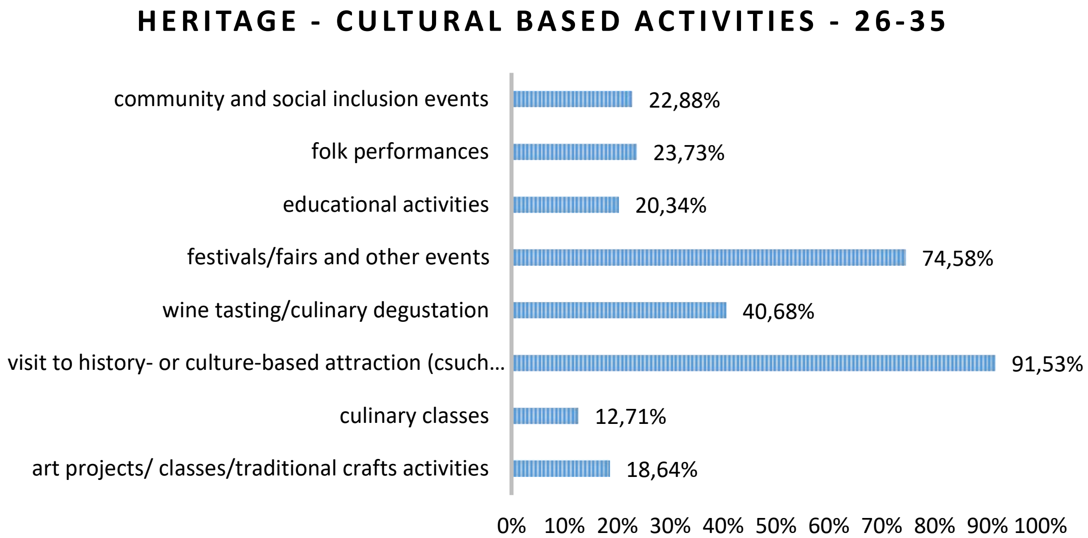

HERITAGE - CULTURAL BASED ACTIVITIES - 19-25
wine tasting/culinary degustation
visit to history- or culture-based attraction (csuch...
community and social inclusion events
folk performances
festivals/fairs and other events
educational activities
culinary classes
art projects/ classes/traditional crafts activities
31,90%
91,43%
18,57%
18,57%
80,00%
23,81%
16,19%
13,33%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

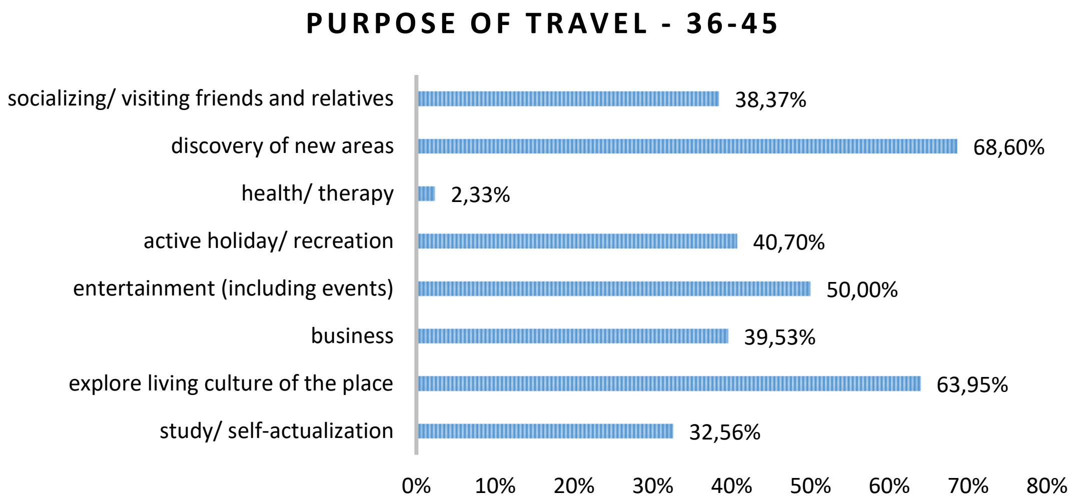
PURPOSE OF TRAVEL - 26-35



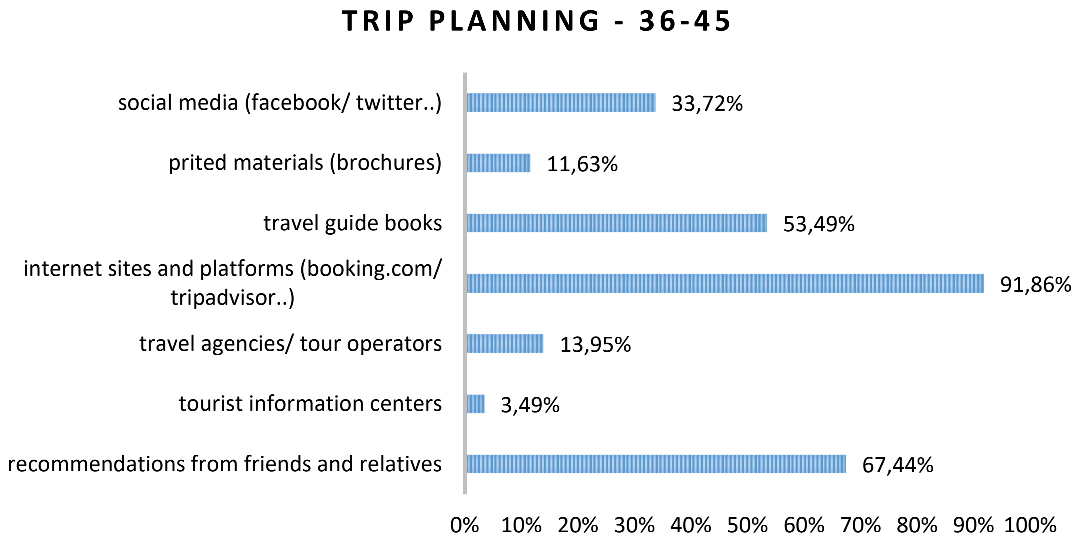
TRIP PLANNING - 26-35

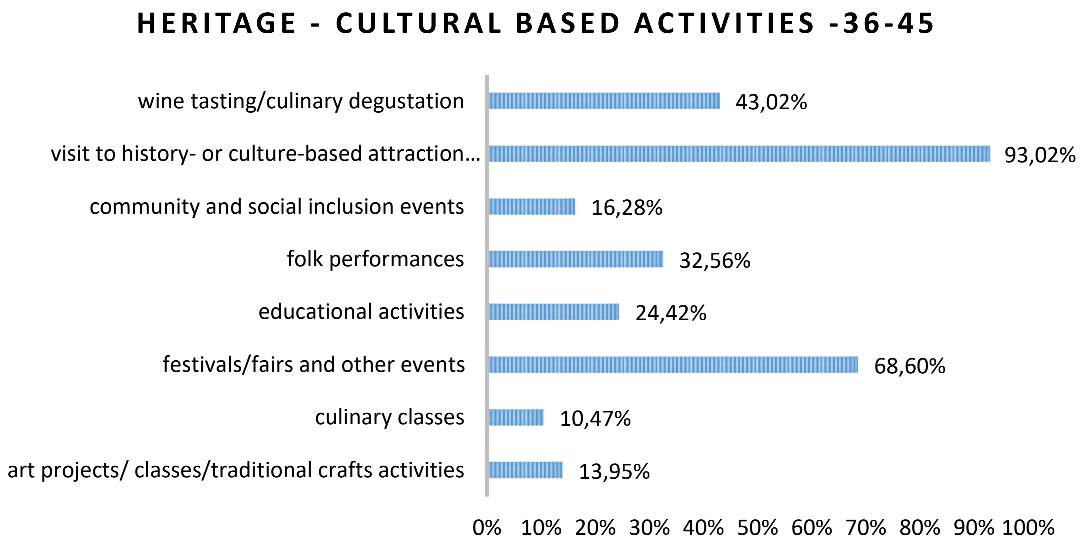



HERITAGE - CULTURAL BASED ACTIVITIES - 26-35
community and social inclusion events
22,88%
folk performances
23,73%
educational activities
20,34%
festivals/fairs and other events
74,58%
wine tasting/culinary degustation
40,68%
visit to history- or culture-based attraction (csuch…
91,53%
culinary classes
12,71%
art projects/ classes/traditional crafts activities
18,64%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

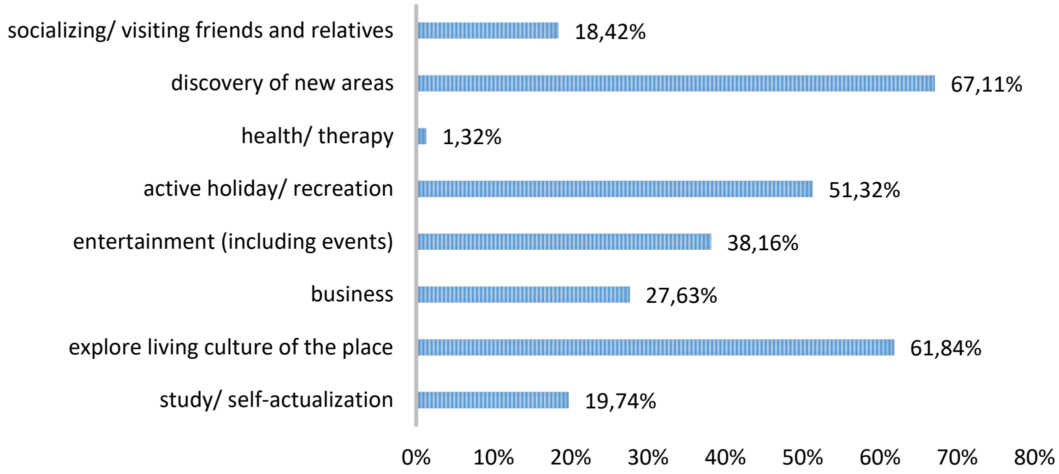

PURPOSE OF TRAVEL - 36-45
socializing/ visiting friends and relatives
38,37%
discovery of new areas
68,60%
health/ therapy
2,33%
active holiday/ recreation
40,70%
entertainment (including events)
50,00%
business
39,53%
explore living culture of the place
63,95%
study/ self-actualization
32,56%
0% 10% 20% 30% 40% 50% 60% 70% 80%

Project funded by
EUROPEAN UNION

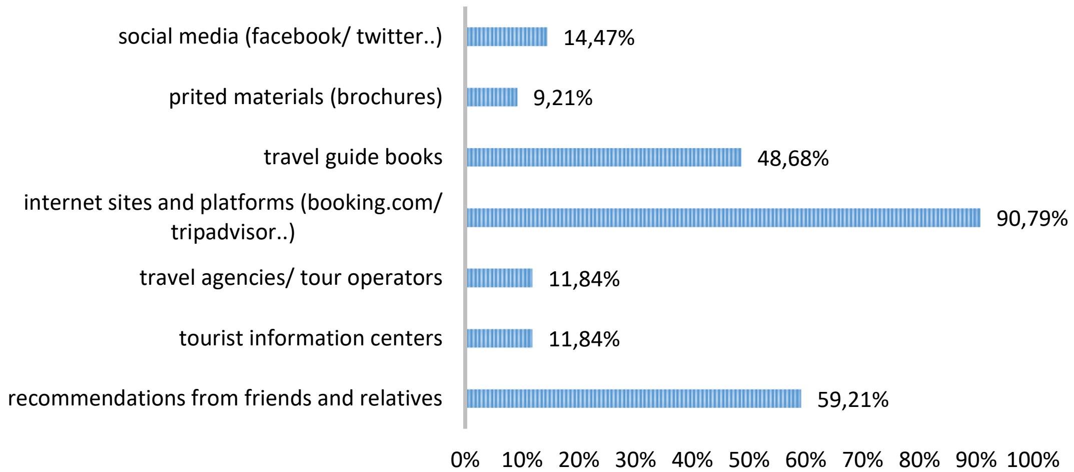




PURPOSE OF TRAVEL - 46-55



TRIP PLANNING - 46-55

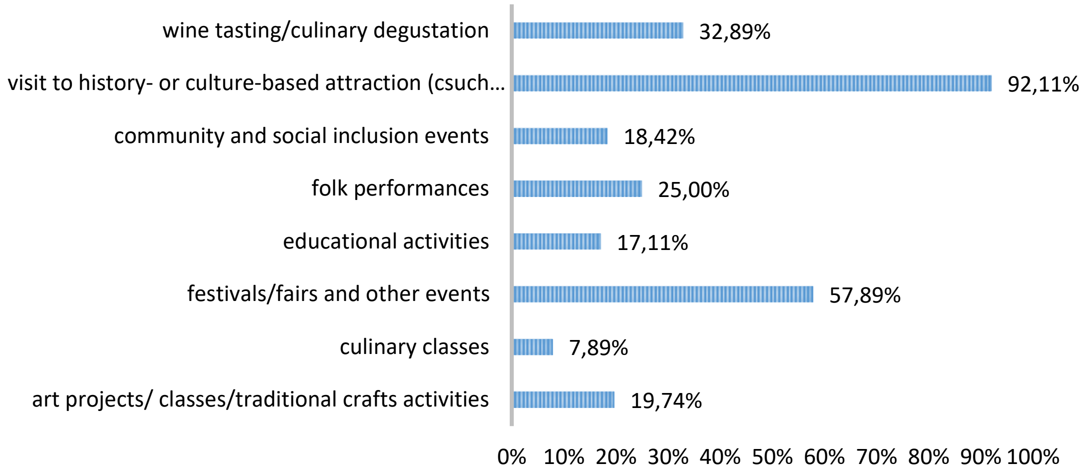


Project funded by EUROPEAN UNION

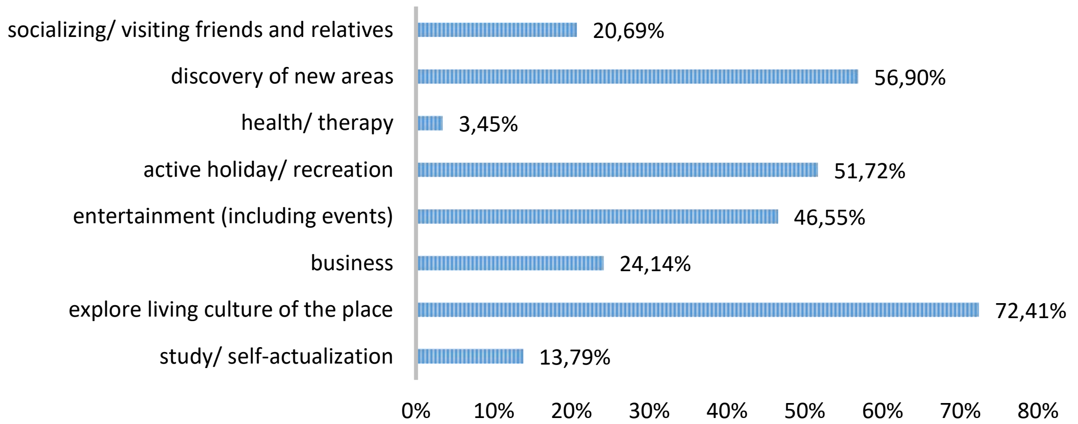
PRO EXTOUR

Black Sea CROSS BORDER COOPERATION

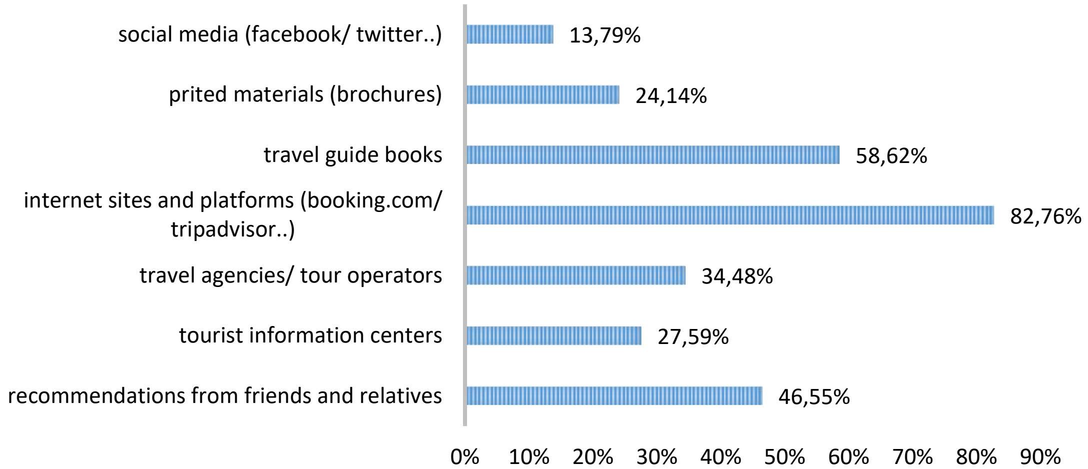
HERITAGE - CULTURAL BASED ACTIVITIES -46-55



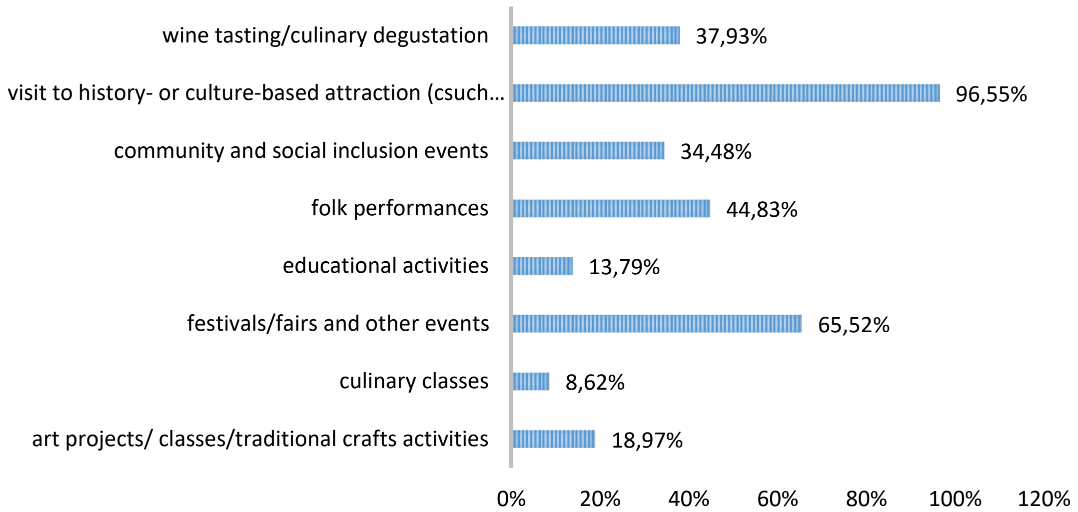
PURPOSE OF TRAVEL OVER 56



TRIP PLANNING - OVER 56



HERITAGE - CULTURAL BASED ACTIVITIES -OVER 56



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