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INTERREG IPA CBC GREECE-ALBANIA 2014-2020

Deliverable 3.2.1 Mapping and Assessment of Thermal Springs in the Cross-Border Area of Greece

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1. Introduction

In the context of the ALTTOUR project, the current document aims to present the mapping and assessment of healing springs on the Greek side of the Greece-Albania border. The report follows the methodology developed by the Ministry of the Environment of Albania for the thermal springs located in the cross-border area of Albania.

The report aims to cover the following areas:

- The mapping of the current situation of the thermal tourism areas of the Greek cross-border area at the level of tourist supply and demand.
- The identification of the special characteristics (infrastructure, attractions, historic and religious significance, cultural events) of the Greek cross-border region. This is presented at the levels of regions, regional units, municipalities and specifically at the level of each spring.
- The cataloguing of the stakeholders with direct and indirect interest in the project and the expansion of tourism development and proposing relevant engagement strategies following an individual assessment. The individual assessment is going to be conducted through the employment of influence and importance matrix.
- The evaluation of tourist supply of the regions of Epirus and Western Macedonia. This includes an analysis of each thermal spring's location, their connection to nearby cities, and the existing supporting and complementary tourism offerings in the Greek area of implementation of ALTTOUR
- The evaluation of tourist demand examining tourism inflows in the region through all available routes and its comparison with other national destinations.
- The effects of the tourist activity on the local economy including but not limited to social, environmental and economic ones.

The report opens, in the following section, with an overview of the methods employed in the preparation of this report, followed by chapter 3 which describes the reasoning behind the selection of the healing springs in the Greek area of ALTTOUR. Chapter 4 introduces the healing spring assets of the Greek cross border area and continues with the examination of the individual characteristics of each spring. The following chapter then proceeds to present the touristic supply that is not directly related with healing springs in the 2 regions of Greece. This is then followed by the analysis of tourist demand, and in the next chapter by the identification and assessment of the relevant stakeholders. After that, the results from the analysis of data for the primary analysis are presented. In chapter 9 we conduct a PESTLE analysis that aims to identify the main factors in play that will affect the

further development of the healing springs. Finally, the last chapter provides some concluding remarks based on the synthesis of the findings of the whole report.

2. Methodological Overview

The methodology of the current report involves primary and secondary research methods that inform the assessment centered in the regions of Western Macedonia and Epirus.

Secondary research methods were a vital component of the report's research methodology and involved gathering information from existing sources such as websites, articles, reports and online databases. Our efforts, leveraged readily available information to gain insights, support decision-making and building a strong research foundation for the project. The first step followed during the secondary research or desk research was to clearly define the effort's objectives, which in our case are:

- The assessment of the capacities of the healing springs
- The assessment of the tourist offering and demand in the Greek cross border area
- The mapping of the tourist offering in the Greek cross border area
- The economic and social impacts of the selected healing springs

Subsequently, important sources of information were identified and employed in our analysis. The websites of all healing springs and management authorities were consulted, along with relevant news articles, legislation and reports regarding tourism in the Region. Previous research conducted on behalf of the Ministry of Tourism was also examined, along with Greek and International academic literature. Data sources were also identified and employed in our analysis. Those, primarily include the Ministry of Tourism statistical database on Greek Tourism(1), the Bank of Greece's databases on Tourism Services Balance of Payments(2) which are collected through a survey conducted at the country's entry and exit points and INSETE's regional tourism statistics(3).

In addition to the secondary research, primary research has been undertaken through:

- a) the employment of online questionnaires,
- b) interviews
- c) a focus group directed towards local and regional stakeholders

Primary research contributes significantly in the accurate depiction of the local political, economic, social, environmental and legal conditions that may affect the strengthening of tourism in the ALTTOUR region through the direct contact with the spring's managing authorities and relevant stakeholders. The concept of the internal environment includes tourism supply and demand, the characteristics of the thermal springs in terms of infrastructure and the effect of the springs on the local society as well as the views and

opinions of relevant institutions. For this reason, in terms of the two questionnaires, they have been distributed in the wider area of application of the ALTTOUR project to¹:

- a) thermal springs management bodies and
- b) public and private bodies related to the provision of tourism policy or services

The completion of the questionnaires has been achieved through online meetings. In this way, the questionnaires have been completed by managers of the agencies with the assistance of the researcher. The first questionnaire was directed at the management authorities of the healing springs in the project area, while the second questionnaire was completed by a representative from each relevant stakeholder as identified in the stakeholder mapping subchapter of the deliverable. The questionnaires have been hosted on the Google Forms online platform, which provides advanced questionnaire features and ensures the quality of the analysis and extraction of the necessary data.

In addition, the findings of the questionnaire surveys have been enhanced by interviews and a focus group. The interviews and focus group aim to further qualitatively analyze the data that has emerged from the questionnaires, offering participants the opportunity for detailed and unhindered expression of their ideas and suggestions. For this reason, the questions of the focus groups and interviews were informed and updated after analyzing the results of the interviews and questionnaires by the spring's management authority. The 2 questionnaires and questions for the interviews/focused discussions are presented in the appendix of this document.

In order to obtain the necessary information as part of the initial questionnaire, the following steps were undertaken. As a first step, we contacted local municipalities to verify and determine the entities responsible for managing each thermal spring. All municipalities pointed to a person or office within a public organization, while two indicated a privately-run management entity overseeing the healing springs (Chanopoulo, Amarantos). The majority of communication was met with prompt responses highlighting the vested interest in the healing springs of the area. Healing spring management authorities filled the questionnaire and also participated in interviews where a greater elaboration of the specific challenges and opportunities was possible. A complete report on the communication efforts and outcomes as part of the first questionnaire is presented in the appendix.

For the second questionnaire addressing stakeholders the attention was directed towards regional units, chambers of commerce, trade, hotelier, travel agent and restaurant

¹ Questionnaires directed to users/clients of the healing springs have been considered but have not been employed due to the different levels of development in the healing springs of the area and the seasonality aspect which would not allow for comparable and sufficient client data for all the springs currently examined.

associations and regional and local governments. It is important to note that not all of these agencies are present in every region and municipality. Despite the concise nature of the second questionnaire, responses from the agencies that were contacted were not that consistent even though there was always expressed initial interest. This lack of response could potentially be attributed to a diminished level of direct interest in the thermal springs, or as mentioned by responders, the previous failed attempts of reviving the thermal spring tourism which failed to live up to expectations and have reduced buy-in. Most stakeholders were contacted at least four times, but response rates to questionnaires remained relatively low.

As a final step, a focus group discussion was organized where beyond a much more unhinged elaboration of their points, participants from management authorities and stakeholders had the opportunity to interact with each other and collaboratively make points about the future development of alternative tourism centered around the healing springs. The findings from the questionnaires and focus group can be found in chapter 8 of this report.

3. Healing springs classification and selection criteria

Healing springs constitute natural phenomena where groundwater is heated by geothermal energy or enriched by underground mineral deposits, and then emerges at the surface. Even though there is no universally accepted classification methodology for healing springs, the most widely used ones focus on differentiations either on the temperature of the waters or the elemental composition found within them. These classifications are usually employed to identify basic characteristics of a spring and, in most cases, indicate specific ailments that the springs can combat in terms of their curative properties. Such classifications include a framework (4) that disaggregates springs into: Geothermal, Natural Hot, Thermal, Mineral, Thermo-mineral, Artesian, Saline, Geysers and Submarine Hot ones. Other efforts to provide frameworks for geothermal spring classification also focus on criteria such as the geological setting and the usage (heating, power generation, recreational-curative)(5).

In the case of Greece, with its rich geological history (including volcanic and tectonic activity), hundreds of geothermal springs are present and suitable for different use case scenarios. In the common effort to promote and develop medicinal/curative springs, the Ministry of Tourism has established² a process of certification for geothermal springs with standardized criteria and has also developed a mapping tool³, on the Ministry's website that provides information on fluid temperatures, chemical and mineral compositions and use cases. Currently 82⁴ cases of geothermal springs with curative properties have been certified all over Greece with 7 in the region of implementation of the ALTTOUR project. The cross-border area in Greece contains parts of the prefecture of Western Macedonia and Epirus. This includes the regional units of Grevena, Kastoria, Florina, Arta, Thesprotia, Ioannina, Preveza, Zakynth, Corfu, Kefalonia and Lefkada. From the 7 spots for geothermal springs which have been certified from the Ministry of Tourism, 3 are located in Western Macedonia and 4 in the Epirus regions. These include mineral, thermal and thermo-mineral springs. With interest gradually emerging in the development and utilization of the area's healing springs for the enhancement of the tourist offering, other springs have been identified and efforts are being undertaken to certify and establish a tourism offering around them. Some of these are also located in the region's neighboring Ionian Islands with very promising outlooks⁵. Since their further development severely depends upon the increased support

² Law 3498/2006 & Initial Minister Decision in 16655/22.12.2006 updated in 2009,2013,2014 and amended by 2188/20.

³ <https://mintour.gov.gr/meletes-pinakes/stoicheia-iamatikon-pigon/>

⁴ https://drive.google.com/file/d/1qL8tpCjwu3rAGh9_OEGvoVzj8N1DddN-/view?usp=share_link

⁵ E.g. Zakynthos healing spring and Igoumenitsa mud baths.

undertaken by the Ministry of Tourism once certified, such cases are not included in our research nor the ALTTOUR project, but it is worth noting that they could constitute significant additions to the healing springs offering in the future.

4. Healing Springs in the cross-border area of Greece

1. Healing Springs of Preveza (Preveza)



The city of Preveza has a Historical Center with multicultural influence of Roman, Ottoman and Venetian descent. It is home to the Venetian Clock Tower, and St. Charalampos' Cathedral, constructed in the 18th century, as well as Seytan Pazar, a bazaar situated in a part of the city with narrow alleys and small shops. Surrounding areas also include points of interest such as the archeological site and museum of Nikopolis, the Acheron "Nekromanteion" dedicated to Hades, and the Acheron River, one of the five rivers of the underworld in Greek mythology.

The healing springs of Preveza are located just one kilometer away from the city center and 450 meters from the Old City, a preserved world heritage location (RAMSAR). There is also a significant offering of activities in the vicinity which include horseback riding, canoe-kayaking, rafting and maritime activities in numerous nearby beaches. The existence of healing springs this close to the city's center constitutes a rare occasion in Greece. Findings around the premises of the spring indicate that it has been used since the 17th century, by Ali Pasha, and has been available to residents and visitors since the 1920's.

The springs' facilities, which previously consisted of 22 individual baths, are currently undergoing extensive renovations in recent years with the aim of enhancing their capacity, accessibility, and included services. These renovations are being carried out meticulously, taking into account the historic significance of the premises, which has resulted in a longer renovation period. It is anticipated that the springs will be operational again in 2024. For many years, the springs have held a significant place in the community, serving as a prominent landmark, thus promoting the springs is a high priority for local authorities. Moreover, due to its close proximity to the city center, the springs are well connected to

various tourist attractions, hotels, restaurants, and one of the two harbors in the entire region through a robust transportation network. To address the issue of seasonality in thermal tourism, local authorities have identified the development of tourist packages and integration with year-round activities as potential solutions. Visitor data reveals that the majority of visitors were Greek residents from nearby areas who were 55 years old or above. Additionally, visitors from Germany and the United Kingdom accounted for approximately 10% of the total number of visitors. The springs' rich content in HCO_3 , Ca, Mg, K, Cl, Na and B is ideal for patients of arthritis and other chronic rheumatic diseases. Other ailments that can be treated include, but are not limited to, sciatica, back pain, skin and gynecological diseases. The use of the thermal baths should be avoided by those with heart disease, edema of the lower extremities, coronary artery disease, cerebral hemorrhages or blood clots, malignant neoplasms, nervous and mental diseases, active tuberculosis or pregnant women after the sixth month.

2. Thermal healing spring of Amarantos (Konitsa)



The city of Konitsa is known for its architecture, its flora and fauna, and its activity-friendly character. The city's natural beauty with green forests, rivers, waterfalls and the Viko-Aoos Geopark, a UNESCO recognized World Geopark. The cozy lodges and hotels, the rare single-arched bridges, are recognizable among Greek destinations. A place frequently appreciated due to its numerous hiking routes, climbing, canoe-kayak, rafting and even paragliding for the more daring visitors. Nearby monasteries and the house of saint Paisios attract religious visitors in the area. The village of Amarantos can be found at 30 kilometers north of Konitsa city, in the mountain of Grammos. The springs of Amarantos are located just a few minutes' drive away from the village surrounded by the area's rich biodiversity. Amarantos has a one-of-a-kind natural steam bath 1200m above sea level, where the temperature of the steam gushing through the rocks ranges from 33 to 38°C. A so rare, that is one of handful natural steam baths in Europe, fascinating visitors. This peculiar natural

phenomenon of vapors containing chemicals such as N₂, O₂, CO₂, CH₄, CO, H₂, and Helium is known to assist in conditions of the lower respiratory system and nasal and paranasal cavities' diseases. The duration of the inhalation therapy is 20-30 minutes and usually lasts 7-10 days during the summer months.

Facilities, currently under renovation, include individual and double rooms, and a larger room with the capacity of providing services to 25-30 people per hour. Infrastructure upgrades, currently underway, will focus on the modernization of services in an effort to attract younger visitors, with the current average age being over 55 years-old, as well as on bringing accessibility upgrades for physically impaired visitors. This modernization will require more specialized staff, including physiotherapists and other relevant professionals. Despite having a wide range of dining options and ample accommodation capacity, the area is not capitalizing on the potential benefits of offering combined accommodation packages. The existing road network, particularly the last 8 kilometers of the route, is in poor condition and poses a challenge. Additionally, the lack of efficient local transportation, with only one bus per week connecting to urban centers, further hampers accessibility. Moreover, the ineffective utilization of tourist family packages, which could integrate visits to the local biodiversity and natural attractions, leads to shorter average durations of visits.

3. Thermal healing spring of Kavasila (Konitsa)



The thermal springs of Kavasila are also located 16.5km away from Konitsa and 5.5km from the nearest settlement, at a 410meter altitude. Kavasila is a small village with less than one hundred residents, and has been known for its thermal springs since the mid-Byzantine Period (700-1200AD). In the area of the springs there is a large outdoor pool with temperatures of 30.5°C, and facilities which include two small hydrotherapy rooms (one for each gender), as well as five individual baths that were constructed but not utilized. The water's density in sulfur is suitable for the treatment of chronic rheumatic diseases, back pain, and neurological conditions with the main elements present in the water being Ca, HCO₃, K, Sr, B, Li and As. The use of the thermal baths is not indicated for those suffering from heart disease, lower limb edema, coronary artery disease, cerebral hemorrhages or blood vessel thrombosis, malignant neoplasms, nervous and mental diseases, active tuberculosis and for pregnant women after the sixth month of pregnancy.

Facilities are currently under complete renovation and are expected to be operational in 2024. Infrastructure upgrades are indicated as a new hope for attracting visitors in the thermal springs, which consist mostly of Greeks aged 55+, and on small occasions Germans and Israelis. Local authorities specified the lack of professionals in the nearby area as a problem in the development process of thermal tourism in the area. In this context, the management body highlighted the necessity of the connection of Kavasila to other tourist attractions and thermal springs, specifically the well-established healing springs of Amarantos also in Konitsa. This link and development of synergies between other tourist attractions is mentioned as the local authority's biggest priority.

4. Healing springs of Chanopoulo (Arta)



The city of Arta, part of the Epirus Region, is a city known for its architecture and natural beauty. The bridge of Arta, dating back to 300BC, which is of historic significance to all Greeks, the castle of Arta and the Byzantine church of Panagia Parigoritissa, constructed in the 13th century are just a few mentions of the monuments included in the area. Churches, museums and galleries, lagoons of Amvrakikos and Koronisia and ancient structures invite visitors in the area for plenty of activities such as aerotourism, canoe kayaking, cycling, windsurfing and hiking.

The village of Chanopoulo is located just 6 kilometers outside of Arta, in the foothills of mount Marathia. The healing springs are in between pine and olive trees, among beautiful traditional scenery. The premises, which are part of a larger stone-built complex, include 18 individual cabins for partial or total body immersion, 6 modern whirlpool bathtubs, as well as a swimming pool with thermal water. The springs are ideal for physiotherapeutic services, hydro-massage, aromatherapy and a total body rejuvenation treatment cycle ranging usually from 10 to 21 days. The water's chemical composition is suitable for the treatment of musculoskeletal and skin conditions, while it is not indicated for visitors who suffer from thermal water crisis and general stress, exudative dermatoses in acute phase, heavy payment, cardiorespiratory failure, generalized carcinomas, severe heart diseases,

severe psychoneurological diseases, T.B.C., thrombosis, vascular strokes, leukemia-lymphomas, severe hormonal disorders and idiopathic hypertension.

5. Mineral spring of Kivotos (Grevena)



Grevena is a town in Western Macedonia with a population of over 16.000 people. It is home to the national parks of Valia Kalda and North Pindos, the 16th century Zavorda monastery, and the Annitsa memorial to the Fallen. Due to its high altitude, it attracts visitors in the ski center of Vasilitsa, one of the best Greek resorts. Other activities include fishing, cycling, rafting, canoe-kayaking and paragliding in Vounasa. Grevena is also known for its traditional cuisine, with pies, pasta, cheese products and a variety of mushrooms.

Kivotos is a village located in the western part of the region, 21km from the city of Grevena. The village attracts many visitors of Pontian descent due to its monument dedicated to their ancestors. The thermal source is located 4km outside of Kivotos, and consists of meteoric water in temperatures of 14.8°C, high in sulfur density. Spa therapy dates back to early 20th century and is preferred for the treatment of chronic rheumatism, sciatica, back pains and nervous system diseases. The use of the thermal baths of Kivotos should be avoided by those suffering from heart disease, lower limb edema, coronary artery disease, cerebral hemorrhages or blood vessel thrombosis, malignant neoplasms, nervous and mental diseases, active tuberculosis, or women after the 6th month of pregnancy. The current infrastructure around the healing spring essentially renders any use of the waters for healing purposes not viable. More specifically the Municipal authorities invested in 2017 by constructing some basic visitor's infrastructure which consisted of 5 small wooden huts that contained individual baths and the capacity to heat the water from the spring, one external pool as well as 3 external small pools. However, this infrastructure was not properly licensed according to Greek Law and due to lack of repairs it is currently not in use and degraded. The municipal authority also developed a business plan for the establishment of a modern spa center in 2018. The business plan identifies the biggest constraint for its implementation being funding and the municipal authorities have been in search of potential

investors for a public-private partnership. Some promotion efforts in the past have tried to utilize other touristic products of the region, such as the small museum on Mammoth findings in the nearby village of Milia, in order to promote the touristic package of the area in unison but have failed to create traction, especially due to the disruptive pandemic closures of the 2020-2021 era. As such, the spring is primarily used today by locals who have quick access to the waters, while the overall visibility and promotion of the spring, even in the nearby city of Grevena, is quite limited. The surrounding area of the spring of Kivotos currently lacks adequate tourism infrastructure to cater to the influx of tourists. While public transport buses do connect Kivotos with Grevena, their limited frequency of just once a day poses a challenge. Additionally, the existing capacity of hotels and resorts in the vicinity is quite constrained, making accommodation options scarce. Moreover, the dining choices available at the moment are also quite limited. Furthermore, it is important to note that the spring lacks the necessary infrastructure to accommodate individuals with disabilities, posing accessibility concerns.

6. Mineral healing springs of Ammoudara (Argos-Orestiko)



Argos-Orestiko is town in Western Macedonia, near Kastoria, associated with religious, and cultural interest. Ancient Dioklitianoupoli, the museums of Argos-Orestiko, Fossilized Forest and Paleontology and Paleobotany are all within a few minutes' range. Visitors are interested in customs and events taking place every year near the area such as the 3-day carnival of Ragoutsaria, The Kolienta singing of unique traditional Christmas carols, Boubounes: the lighting of fires on city squares on carnival Sundays, Rodani: a wooden cradle built by locals with is set in city squares during the easter season and many other local traditions. Kastoria attracts religious visitors with its plethora of over 70 Byzantine and post-Byzantine churches and monasteries showcasing exceptional architectural designs and exquisite frescoes.

The mineral healing springs of Ammoudara are located in a lush landscape of riverside vegetation, about 625m above sea level. The springs are a 5-minute drive from the airport

of Kastoria, 25 minutes from downtown Kastoria, and 4km from Argos Orestiko. Argos-Orestiko is home to alternative tourism, water sports and canoe activities in lake Orestiada. The diversity of possible activities in the region, makes Ammoudara attractive to visitors of different age groups.

The accommodation, hydrotherapy and spa facilities are right next to the springs, which include 15 individual baths, and a swimming pool. Waters at an average temperature of 18oC containing U, H₂S, Ca, Mg, Cl, and HCO₃, are suitable for rheumatic diseases, back pain, sciatica, nervous system diseases and others. Exposure to thermal baths should be avoided by those suffering from heart disease, edema of the lower extremities, coronary artery disease, cerebral hemorrhages or blood vessel thrombosis, malignant neoplasms, nervous and mental diseases, active tuberculosis, as well as for pregnant women after the sixth month. The springs are also employed for inhalation therapy known to assist in rhinitis and nasal conditions.

The official recording of visitors' flows has been implemented during the past two years, with local authorities indicating that the vast majority of the springs' visitors are Greeks, aged 55 or older. The accommodation and restaurant options of the area are sufficient and pose no risk of being fully booked, however transport problems exclude most visitors not owning a car. Local authorities consistently work towards promoting the healing springs, in favor of the economic benefits they bring to the local community. Local authorities are also interested in the importance of expanding the range of services offered within the facilities to encourage visitors to extend their visit duration and facilitate future growth.

7. Thermal healing springs of Agrapidia-Limnoxori (Florina)

Florina is a town of Western Macedonia with over 17.000 habitants, located just over 650m above sea level. It is a town known for its architectural, cultural and activity-based interest. Archeological, modern art, and the Captain Kottas museum of the Macedonian struggle are all located in Florina. Nearby Destinations include The Prespes National Park as well as the Post-Byzantine monuments of Prespa (45km from city center), Vigla - Pisoderi ski resort (19km from city center) and the bear sanctuary "Arcturus" (40km from city center). Cultural events include the Fires of Florina before Christmas, concerts during the summer such as the celebration of Prophet Elias on July 20th and Pepper Festival in late August.

The thermal healing spring of Agrapidies is located approximately 40-minutes from the center of Florina, and 55km from the airport of Kastoria, by lake Zazaris, in the town of Amyntaio. The lake attracts visitors interested in various activities such as canoeing, fishing, horseback riding, and hiking Water temperatures of about 28oC, streamed into two group

pools containing Na, HCO₃, S, K, and F can assist in the treatment of musculoskeletal and nervous system diseases, as well as skin conditions, while they are contraindicated for those suffering from liver, kidney, heart failure and malignant diseases.

A significant investment has been conducted before 2010 establishing spa facilities that included 1 Olympic sized external pool accompanied by 2 smaller ones. Individual baths are also available along with rooms available for physiotherapy and massage. However due to administrative issues and problems with issuing the environmental impact licenses on time has rendered the facilities inoperable since their establishment. Moreso, even the population of the surrounding areas is not aware of the existence of the baths. The area offers accommodation to cater to tourists, and there are ongoing plans for a model settlement under the KEFIAP Amyntaio Center for Natural Medicine and Rehabilitation, which caters to people with kinetic disabilities. Public authorities have considered several synergies a cooperation between the two can bring. However, a hindrance to this project is the shortage of specialized workers. Despite its proximity to Florina, there is no urban or interurban transportation available to access the springs. The surrounding area boasts excellent dining services, including award-winning restaurants. Currently, the springs in Agrapidia are not operational and in need of some minor renovation that will constitute them operational once again. In terms of Xino Nero there is minimal promotion of the springs for tourism, and there is limited connection with other tourist attractions, as the area's geothermal potential remains untapped. The local authorities have made the promotion and support of the thermal springs a significant political priority, evident in the funding of a corresponding strategic study. The most crucial intervention named has been the outreach and promotion of the potential benefits of the baths among the municipalities, along with the development of expertise and skills among locals, in order to further develop the healing spring offering of the area.

8. Healing Springs of Xino Nero (Florina)



The Local Community of Xino Nero belongs to the Municipality of Amyntaio and is a modern settlement with 1,300 inhabitants. It is located in the northwestern part of Macedonia, at an altitude of 650 meters, 30 kilometers away from Florina, and 5 kilometers from Amyntaio. The main characteristic of the settlement is already indicated by its name

(translates to "Sour Water"), which, whether in its current form or in the form it had during the Ottoman rule (Exi Sou), refers to the existence of sources of natural mineral water of exceptional quality.

Amyntaio is also connected with wine tourism, as it includes the PDO viticultural zone with the dominant variety being "xinomavro", which is part of the Wine Routes. In addition to wine tourism, which is supported by numerous wineries recognized by the Ministry of Tourism as visitable within the broader area, Xino Nero has been renowned since ancient times for the healing properties of its springs. Aristotle referred to the springs of Xino Nero when speaking of a healing spring in Lynkestis. According to legend and folk tradition, it was here that the mother of Alexander the Great brought him when he was young, to quench his thirst and gain the strength of the water for the fierce battles the great strategist would undertake. During the Byzantine era and the Ottoman rule, the springs of Xino Nero were well-known for the therapeutic properties of the natural mineral water, effective against stomach ailments, kidney disorders, and other diseases.

The first bottling plant in Xino Nero was constructed by the French soldiers of the Eastern Army during World War I. General d'Esperey had described Xino Nero's water as equivalent to, if not superior to, the famous French mineral waters, and therefore, he hastened to utilize it for the French troops.

The cold and acidic healing water that originates from the springs of Xino Nero has been bottled in an automated bottling plant since 1958. The region of Xino Nero is rich in water resources with natural mineral water. In 1992, it came under the ownership of the then Xino Nero community as a pure community enterprise. With the incorporation of the Xino Nero community into the expanded Municipality of Amyntaio, it became a municipal enterprise. The enterprise bottles and trades the natural mineral acidic water as well as carbonated beverages.

This healing water with an average temperature of 15°C is used year-round for hydrotherapy and is deemed suitable for balneotherapy according to Government Gazette 3182/2023. It is indicated for treating gastrointestinal, cardiovascular, and urinary tract issues. Simultaneously, it is contraindicated for cases of hypertension, skin ulcers, recent myocardial infarction, and mitral valve stenosis.

Healing Spring	Public Managing Authority	Region	Temperature	Use	Chemical composition	Ailments	Contraindications	Individual Baths	Individual Hydromassage	Group Baths	Group bath and Pool Capacity	Group Hydromassage Capacity	Outdoor Pools	Natural Reservoirs
Preveza	Municipality of Preveza	Epirus	19.7	Bath Therapy	Ph: 6.99 Rn, Cl, Na, HCO ₃ , Ca, Mg, K, B	rheumatic diseases chronic rheumatism, sciatica, back pain, nervous system diseases	heart disease, swelling of lower limbs, coronary heart disease, cerebral hemorrhages or blood clots, malignant neoplasms, nervous and mental diseases, active tuberculosis, pregnancy after the sixth month	22 ⁶	0	0	0	0	0	0
Amarantos	Municipality of Konitsa	Epirus	32.6-38.1	Λουτροθεραπεία, Εισπνοθεραπεία	Ph: 5.4-20oC Ph: 8.16-25oC N ₂ , O ₂ , CO ₂ , CH ₄ , CO, H ₂ , He	inhalation therapy for obstructive conditions of the lower respiratory system and diseases of the nose and sinuses	-	4	0	3	25	4	0	1
Kavasila	Municipality of Konitsa	Epirus	30.5	Bath Therapy	Ph: 7.42 Ca, HCO ₃ , K, Sr, B, Li, As	rheumatic diseases, chronic rheumatism, sciatica, back pain, nervous system diseases	heart disease, swelling of lower limbs, coronary heart disease, cerebral hemorrhages or blood clots, malignant neoplasms, nervous and mental diseases, active tuberculosis, pregnancy after the sixth month	0	2	1	30	2	1	0
Chanopoulo	Municipality of Arta	Epirus	17	Bath Therapy	Ph: 7.3 H ₂ S, Cl, Na	skin diseases, musculoskeletal diseases	Crisis from thermal water and general stress, exudative dermatoses in acute phase, fatigue, cardiorespiratory failure, generalized carcinomas, severe heart diseases, severe psychoneurological diseases, T.B.C., thrombosis, cerebrovascular attacks, leukemia-lymphomas, severe hormonal disorders, idiopathic hypertension.	14	6 ⁷	0	0	0	0	0

⁶ The final capacities of the Thermal Springs of Preveza are not available as the facility is undergoing extensive renovation. The numbers shown are for previous capacity.

⁷ Direct extraction of exact capacities was not possible and therefore literature references have been used(6).

Healing Spring	Public Managing Authority	Region	Temperature	Use	Chemical composition	Ailments	Contraindications	Individual Baths	Individual Hydromassage	Group Baths	Group bath and Pool Capacity	Group Hydromassage Capacity	Outdoor Pools	Natural Reservoirs
Kivotos	Δήμος Γρεβενών	Western Macedonia	14.8	Bath Therapy	Ph: 7.3 : Ca, Mg, HCO ₃ , Cl, H ₂ S, CO ₂	rheumatic diseases, chronic rheumatism, sciatica, back pain, nervous system diseases	heart disease, swelling of lower limbs, coronary heart disease, cerebral hemorrhages or blood clots, malignant neoplasms, nervous and mental diseases, active tuberculosis, pregnancy after the sixth month	6	0	0	40	0	1	0
Ammoudara	Δήμος Άγους Ορεστικού	Western Macedonia	18	Bath, Steam bath, Inhalation Therapy	Ph: 7.4 Rn, HCO ₃ , Ca, Na, Mg, Cl, H ₂ S	rheumatic diseases, chronic rheumatism, sciatica, back pain, nervous system diseases, chronic sinusitis, acute rhinitis, allergic rhinitis.	heart disease, swelling of lower limbs, coronary heart disease, cerebral hemorrhages or blood clots, malignant neoplasms, nervous and mental diseases, active tuberculosis, pregnancy after the sixth month	5	0	4	13	0	0	0
Agrapidia	Municipality of Amynteo	Western Macedonia	28.5	Bath Therapy	Ph: 7.41 Rn, Ra, HCO ₃ , Na, SO ₄ , K, F	musculoskeletal, nervous, skin diseases	liver, kidney, heart failure and malignant diseases	0	0	3	300+ ⁸	0	3	0
Xino Nero	Municipality of Amynteo	Western Macedonia	15	Bath Therapy	Ph: 6.3 Ra, U, Ca ²⁺ , HCO ₃ , CO ₂ . H	gastrointestinal system, cardiovascular system, urinary system	high blood pressure, skin ulcers, recent myocardial infarction, mitral valve stenosis, respiratory system disorders accompanied by heavy smoking, and cases of cerebrovascular diseases	0	0	0	0	0	0	0

⁸Facilities include an Olympic size swimming pool. Capacity may be subject to restrictions based on Health and Safety protocols.

5. Tourism Supply

5.1 Epirus Region:

The region of Epirus lies along the western coast of mainland Greece between the Ionian Sea and the Pindos Mountain range. The region possesses a remarkable tourism potential by virtue of its abundant and diverse resources scattered across its geographical expanse. Its advantageous positioning and rich resources make it an ideal destination for alternative forms of tourism with significant untapped potential. This potential can be found in the realms of Cultural and Religious tourism, the captivating thematic allure of "Sun & Sea" which is characteristic of Greek tourism, the alluring appeal of yachting and the excitement of City break visits. With its plethora of offerings, the region of Epirus can deliver a comprehensive and enriching tourist experience across its various captivating destination, encompassing the enchanting city of Ioannina, the adjacent picturesque mountainous regions and the mesmerizing Epirus coastline. Some of the numerous and diverse touristic offerings of the region are:

- Extensive coastline with numerous accessible beaches including secluded and picturesque beaches where mass tourism is absent
- Operation of maritime-tourism businesses including diving schools, rental of pleasure boats, rental of sports equipment for marine activities, as well as businesses of daily cruises, sea excursions, etc. offering a multitude of choices to visitors.
- Rich natural and environmental resources of incomparable beauty and high value that can form the basis for the development of thematic forms of tourism (eg Agrotourism, Ecotourism, Outdoor tourism leisure activities). The fact that the Region did not have significant tourist flows in the past helped to preserve the region's natural resources.
- Rich stock of cultural, historical, religious and archaeological monuments, as well as the cultural route in the Ancient Theaters of Epirus that can form the basis for the development of Cultural & Religious Tourism. The Region has important archaeological museums (Ioannina, Preveza, Thesprotia) and a significant number of archaeological sites that testify its centuries-old history and cultural tradition, including the ancient Theater of Dodoni, which is one of the largest and best preserved ancient Greek theaters, and the Early Christian Nicopolis. Despite the increase observed in Archaeological site and Museumvisitation of the Region, the room for improvement is significant

- Existence of facilities for the development of MICE tourism in the hotel potential of the city of Ioannina (with a capacity of up to 2,000 people / delegates)
- Important urban centers (e.g. Ioannina, Preveza and Arta), of which Ioannina could have City Break tourism as a supporting product, especially after the recent significant improvement of their accessibility and connectivity
- Culinary wealth, in Ioannina and in nearby mountainous traditional settlements, such as Zagorochoria, Tzoumerka, Kastanochoria, which includes recipes from the local traditional cuisine but also a significant number of PDO and PGI products (e.g. metsovone, galotiri) as well as traditional products.
- A large number of traditional settlements in Zagoria, Tzoumerka, Kastanochoria etc. with a separate and distinct identity
- The Region of Epirus stands out in terms of activities related to winter sports and outdoor soft sports and leisure activities, as it has the newest ski center in Greece, and a significant number of mountain refuges, concentrated in the Pindos Mountain range, creating fertile ground for the further development of winter tourism. In addition, it has climbing fields, hiking / trekking routes, as well as rivers, where kayaking and rafting activities take place, favoring the development of adventure tourism

5.1.1. Cultural and Religious Tourism

Museums

Epirus has a large number of museums of various topics, through which its history, cultural and folklore wealth is highlighted:

- Arta: Archaeological Museum of Arta, Museum of Classical Antiquities, Folklore Museum "Skoufa", Historic Museum "Skoufa", Folklore Museum "Athamaniou"
- Thesprotia: Epigraphic Museum, Archaeological Museum of Igoumenitsa, Folklore Museum of Tsamandas, Folklore Museum of Phoenicia
- Ioannina: Archaeological Museum of Ioannina, Byzantine Museum of Ioannina, Municipal Museum of Ioannina, Folklore Museum of Ioannina, Museum of National Resistance, War Museum, "Kostas Frontzos" Epirotian Folk Art Museum, Museum of Greek History (wax effigies) of Pavlos Vrellis, Mansion Misios Exhibition Center in Ioannina, Museum of Silversmithing in the Castle of Ioannina
- Preveza: New Archaeological Museum of Nicopolis, Archaeological Museum of Nicopolis, Naval Battle Museum of Actium, Folklore Museum of Zalogos

Archeological sites

The archaeological sites mentioned below serve as evidence of the region's historical importance:

- Arta: Temple of Pythian Apollo, Amvrakia, Castle of Arta, Mosque of Faik Pasha in Imaret, Orraon (Ammotopos), Cemetery
- Thesprotia: Pyrgos Ragiou, Dymokastro, Gitana, Fanoti-Doliani, Elea, Agios Donatos, Igoumenitsa Castle, Ladochori, Lygia, Mastilitza, Polineri (Koutsi), Mazarakia Cemetery, Raveni
- Ioannina: Dodoni, Acropolis of Dodoni, Ancient Theater of Dodoni, Ancient Stadium of Dodoni, Temple of Dodoni, Temple of Areio Dia in Rodotopi, Temple of Aphrodite in Dodoni, Temple of Dione in Dodoni, Temple of Themis, Temple of Herakles, Castle Ioannina, Acropolis of Kastritsa, Acropolis of Megalo Gardiki, Vitsa Zagori
- Preveza Region: Vouchetion, Asprochaliko Cave, Zalogos, Ephyra, Ancient Batia, Roman Palace of Rizon, Pantokrator Castle, Castle of the Five Wells, Castle of Agios Georgios, Castle of Agios Andreas, Castle of Rinias, Lygia, Anthousa Castle, Parga Castle, Necromanteion of Acheron, Early Christian Nikopolis, Kossopi, Necropolises, Nikopolis

Cultural routes and guided tours

Additionally, in the region of Epirus many monuments of rural countryside and folklore are preserved, such as stone bridges, water mills, wineries, which, in combination with the folklore museums, historical buildings and folklore events, the manners and customs of the region could form the basis for drawing thematic cultural itineraries. The basic cultural route and path that has been created in the region and functions as a link between elements from the culture, social structure, natural environment and customs of the place is the "Cultural Route to the Ancient Theaters of Epirus". The cultural route spans 4 Regional Units and includes: 5 archaeological sites (Dodoni, Nikopolis, Kassopi, Amvrakia and Gitana), 8 ancient viewing and listening areas (including the theaters of Nikopolis, Dodoni, Kassopi, Amvrakia and Gitana), 344 kilometers of route and 2,300 years of history. In fact, this project is the first NSRF (2014-2020) project of the country.

Cultural events

The variety of events and cultural activities throughout the year highlights the cultural wealth of the region and strengthens its attractiveness as a Cultural & Religious Tourism destination by improving local entrepreneurship, the quality of life of local residents and contributing significantly to the extension of the tourist season. Some of the most important cultural events are:

- *Ioannina*: Tjamales Carnival, Rounds of the Lake, Vovoussa, Honey Festival, Vitsa Bream Festival, Motor Festival, Dodoni Festival, Zagori Mountain Running, Street Food Festival
- *Thesprotia*: Souli Festivals, Olive oil & Olive Festival in Perdika, River Party Festival in Kalamas River, Sea Bream Festival in Sayada, International Polyphonic Song Festival, Acheron River Festival, Traditional Dance Festival in Katavothra Margaritiou, Carnival Events and Koulouma, Trade Fair (Lambovo),
- *Arta*: Dance Marathon, Tzoumerka Arachthion Theater Festival, Ski Festival, Nuts and Tsipouro Festival, Women's Carnival, "Apeiros Gi" - Celebrations for the liberation of Arta, Battle of Gribovo, Skoufaika, Karaiskakia, Arachthia,
- *Preveza*: Zero festival, Preveza Jazz festival, Aktia, Christmas village of Preveza, International Choir Festival, Zalongia, Diogenia, Sardine festival.

5.1.2. Agrotourism-Gastronomy

In the Region of Epirus there is a sufficient number of traditional agro-tourism guesthouses while excellent quality raw materials and agricultural products are the main ingredients of the local gastronomy. Many of these are PDO "protected designation of origin" or PGI "protected geographical indication" products. Agrotourism enterprises are certified by Greek public authorities while upcoming developments from the Ministry of Tourism are aiming to further boost the incentives and expansion of this alternative form of tourism over the coming years⁹. Additionally, a special certification for breweries, cheese making facilities and olive processing facilities has been implemented highlighting agrotourism visitable structures.

5.1.3. Wine Tourism

Wine making in Epirus dates back to the 15th century. Although quantitatively the production falls short of the other geographical divisions of the country, the same is not the case in terms of quality. Epirus produces, in terms of style, expressive wines from native

⁹ More specifically, undergoing EU funded projects are aiming to increase entrepreneurship and investments in agrotourism and further diversify the agro-tourist product and services of Greece

and international varieties. The natural beauty, the cultural heritage of Epirus, as well as the many areas with a friendly climate for viticulture, are strong cards for highlighting and promoting a small but dynamic wine industry. In the Region of Epirus wine tourism is currently being developed, in the area of Ioannina (Zitsa, Metsovo, North Tzoumerka) as well as in Thesprotia where 2 small wineries exist (in the municipality of Filiaton & Parapotamos Igoumenitsa), in Preveza there is one & in Arta there are 2 that have been operating for a few years. According to the wine zoning established by the National Interprofessional Organization of Vine and Wine (EDOAO), Epirus is the western part of the wine-growing Northern Greece, in the area of responsibility of the Wines of Northern Greece. Consequently, wine tourism in Epirus is included in the "Wine Routes of Northern Greece". In the wine map of Greece, the vineyards of Epirus with 1.1% of the country share is in the 8th place among the 9 wine-growing regions. The Wine Route of Epirus, which is one of the 8 routes of the Wine Routes of Northern Greece, also develops in the area of Ioannina.

In the wineries of Zitsa, the tasting is a special experience since it can include the whole range of winemaking, from sparkling and semi-sparkling wines, dry whites, rosés and reds, spirits, aged spirits as well as other different styles of wine. The "god bridge", a natural bridge with rocks in Kalamas is a rare monument of nature, an ornament for the entire region, while nearby the famous Holy Monastery of Pateros as well as the Holy Monastery of Paliouri can be visited. The Route goes up towards the Zagori area, in the Vikos-Aoos National Park with the most characteristic feature being the unique beauty of the Vikos ravine as well as the natural pools of Papigo and the Drakolimni of Gamila. In the wider area, there are villages and traditional settlements with guesthouses, restaurants and workshops of local products. The last stop of the Wine Route of Epirus is the region of Konitsa with its unique natural beauties formed in the mountains of Grammos, Smolikas, Tymfi and in the passage of the rivers Sarantaporos, Aou, Voidomatis. The area also offers alternative forms of recreation, entertainment and tourism (hiking, rafting, kayaking, paragliding, winter skiing in Vasilitsa, etc.). In Zitsa of Ioannina there is a tradition of producing wine with strong dioxide. This tradition has been exploited and the region is one of very few in Greece that produces semi-sparkling and sparkling wines. Epirus, and especially Ioannina and Arta, there is a great tradition of tsipouro making. 6 wineries operate on the production of the spirit while 5 also bottle it. Since December 2011 (B 3211/2011) Tsipouro Epirus (or Tsipouro Ipirotiko) is a PGI (Protected Geographical Indication).

5.1.4 Sea Tourism

In the Region of Epirus, a marina in Preveza with 297 berths is recorded. 2 shelters for tourist boats have also been planned in Thesprotia with 216 berths. The Igoumenitsa Port

Organization promotes, as part of its strategic planning, the development of a network of marinas and tourist boat shelters, which is planned for the areas of Igoumenitsa, Plataria, Sayada and Sivota.

5.1.5 Sports Tourism: Climbing

The Region of Epirus has climbing fields, hiking/trekking routes, as well as rivers, where kayaking and rafting activities take place. Several climbing fields are in operation in Epirus while as of 2022¹⁰ the Ministry of Tourism has established a working-group for the further promotion of climbing tourism in Greece. As of the moment, the following climbing fields can be found in:

Ioannina:

- Mount Kastritsa: routes of a training nature, as the rocks do not exceed 35-40 m. with secured routes of difficulty from III to VI
- Islet of Lake Pamvotida: climbing of a training nature as there are secured routes where the degree of difficulty does not exceed VI
- Terovo: rocks of high-quality limestone, the height of which exceeds 85 m., for experienced climbers, as the degree of difficulty is from IV to VII

Arta:

- Peranthi: educational climbing field, at a distance of 10 minutes from Arta with a degree of difficulty of the field routes from V- to VI+.
- Artificial track at the Plaka Bridge
- Kryopigi Waterfall in Tzoumerka with routes of difficulty from 5b to 7a, located essentially at the point where the water falls from the falls

5.1.6. Diving Tourism

Recreational diving is an ideal model for the development of coastal areas that offer nature and sea, and Epirus is considered an ideal place for the development of this specific form of tourism. The diving parks in Sivota and Parga are already in the licensing process according to data from the Ministry of the Interior. A characteristic feature of the marine area at Cape Mytika is a rich flora of macroalgae and posidonia meadows, while from Parga to Mytika there is a large number of sea turtles that forage or breed on the shores as well as

¹⁰ Decision 3248/28.02.2022 and subsequent decision 10718/27.05.2022

seals and bottlenose dolphins. Legislative efforts¹¹ at the national level are aiming to further boost diving tourism for the country.

5.1.7. Eco Tourism

The geomorphology of the Region of Epirus is characterized by the mountainous ranges that covers 77% of its total area (Mountain of Pindos) and the abundance of surface waters, such as rivers (Arachthos, Louros, Kalamas, Acheronts, Aaos, & Acheloos), lakes / wetlands (Lake Ioannina, the small lakes Zaravina, Ziros and Mavri, as well as the artificial lakes of Pigon Aaos, Pournario, Arta and Louros river, created for hydroelectric purposes), and lagoons (lagoon Tsoukaliou and Logarou in the Amvrakiko gulf and the lagoon of Sayadas in Thesprotia). As such the region of Epirus presents valuable opportunities for the further development of Eco-Tourism which are also highlighted by the rich protected resources that it has:

- National Parks (Pindos and Vikos-Aaos),
- National Parks (Northern Pindos, Wetlands of Amvrakikos gulf and Tzoumerka, Peristeri and Arachthos ravine)
- 1 Ecodevelopment Area (Lake Pamvotida)
- 1 Wetland of International Importance (Ramsar) (Gulf of Amvrakikos)
- 28 areas which are part of the European Ecological Network NATURA 2000
- Specially Protected Areas according to protocol 4 of the Barcelona Convention (Aesthetic forest of Nikopolis - Mytika at Preveza and Amvrakikos gulf)
- Aesthetic Forests (Periastian forest of Ioannina and coastal forest of Nikopoleos-Mytika Prevezi)
- Preserved Natural Monuments (the Platanos of Arta and the Platanos in Elia Thesprotia)
- 34 Wildlife Refuges Additional natural resources
- Landscapes of particular natural beauty, which are concentrated mainly in the coastal area that stretches from the Acheron estuary to Sayada and in the central mountain massif
- Caves: Pramanton Cave, Perama Cave

¹¹ Law nr4688/2020 established a Diving Tourism Council which is a permanent tool that aims to further enhance diving tourism in Greece.

5.2 Region of Western Macedonia

The Region of Western Macedonia is located in northern Greece and borders to the north with Albania and North Macedonia, to the east with Central Macedonia, west with Epirus and Albania and south with Thessaly. Its area is 9,451km² and is equivalent to 7.2% of the total Greek area. Situated in the northern part of the country, this region offers a unique blend of cultural heritage, outdoor adventures, and serene landscapes. For history enthusiasts, the region boasts a rich cultural heritage that can be explored through its ancient sites and museums. Nature lovers will be delighted by the region's diverse landscapes and outdoor activities. Western Macedonia's culinary landscape is a delightful exploration of flavors, blending Greek and Balkan influences. The region is also proud to host exquisite wine makers renowned for their unique flavors and aromas.

Western Macedonia is well-positioned to meet this demand and provide appealing opportunities for travelers. The key tourism offerings of the region are as follows:

5.2.1 Cultural Tourism

Museums

Western Macedonia showcases its rich history, culture, and folklore through a diverse array of museums, offering visitors numerous opportunities to explore different topics and research into its abundant heritage.

Florina: Archeological Museum of Florina, Modern Art Museum, Museum of the Macedonian Struggle Captain Kottas (at the Kottas settlement in the community of Krystalopigi), as well as various Folklore Collections

Grevena: The Assumption of Virgin Mary, Museum of Natural History in Milias, Museum of Mushrooms in Lavda, and various Folklore Collections in Kydonies, Kyparissi, Deskati, Agios Kosmas

Kastoria: Museum of Argos Orestiko, Museum of Costumology, Museum of the Macedonian Struggle, Folklore Museum of Kastoria, Byzantine Museum, Tsiatsiapas Mansion, Paleontology and Palaiobotany, Pavlos Melas Museum in Statista, Museum of wax figures

Kozani: Historical Folklore Museum, Archeological Museum of Aiani, Museum of Contemporary Topical History, Archeological Museum of Kozani, Museum of the Macedonian Struggle, Lassanis Mansion, Vourkas Mansion, Anthropological and Folklore Museum of Ptolemais, Kovedarios Public Library, Gallery of Ptolemais

Cultural events

Western Macedonia also provides significant cultural events on a yearly basis as part of their efforts to highlight local culture, cuisine and religious events. Some of the most important cultural events in the region include:

Florina: Kourmpani- (Agios Panteleimonas Amyntaion (Florina) 26-27/7, Foties- 23/12, Cinema Festival November, Barbaria- New Year's Eve carnival events, Celebration of prophet Elias- series of summer cultural events on July 20, "the Varikiotika"- traditional events 13-15 August, Pepper Festival 2-day event in late August, Prespeia- Pan-European simultaneous cultural events in Prespes and other communities

Kastoria: Ragoutsaria- A 3-day carnival at the beginning of every year in Argos-Orestiko Mavrochori and Lithia, Boubounes- lighting of fires in city centers on carnival Sundays, Rodani- Easter tradition, Cultural August Event, Celebration of Klidonas- 24/6, Orestia choral festival of Argos Orestiko, River Party- Musical event on Aliakmonas River in Nestorio on the 1st weekend of August, Tsipouro Festival in Lithia, Bean Festival in Lakkoma and Chestnut Festival in Kastanofyto

Grevena: Lake Festivals during the summer and carnival seasons, Panhellenic mushroom festival

5.2.2. Archeological sites and Monuments

Florina: Archeological site of Petron, Hellenistic city of Florina, Prehistoric settlement of Florina, Prehistoric settlement of Armenochori, Nikios School (Nymfaio), Prespes National Park with Saint Achilios church.

Kastoria: Ancient Dioklitianoupolis, Lake settlement of Dispilio, Doltso Neighborhood, Archeological site of Argos-Orestiko

Kozani: Archeological site of Necropolis Aianis, Castle of Velventos, Castle of Ktenio, Servia, Towers of Eordeas, Old castles of Velventos, Gratsanis and Kaisaria, Byzantine and post-Byzantine monuments of Velventos and Aianis, Holy Church of the Transfiguration of the Saviour

Grevena: Fortress of Grevena, Acropolis of Elimia and Kastri, Castles of Grevena and Spilaio, Koulia of Lochmi, Holy church of saint Nikanoros

5.2.3. Religious Sites

The region of Western Macedonia is also rich in religious sites that have endured the test of time and now consist ideal tourism attractions for visitors seeking to immerse in the

rich religious history and customs. At the moment, there are hundreds of churches in western Macedonia and over 30 unique monasteries spread out around its countryside. Hardcore religious visitors can visit those, while some more well-known sites offer interesting destinations for tourists that are not primarily visiting the region for religious purposes. These sites include:

Kastoria: More than 70 Byzantine and post-Byzantine churches and monasteries in and around the city, indicatively (church of Panagia Mavriotissa, church of Panagia Kastriotissa, church of Saint Stefanos, church of saint Nicholas, Kasnitzis, church of Panagia of Tsiatsiapa, church of Agios Georgios Omorfokklisias).

Grevena: Monastery of the Holy Transfiguration of the Saviour built in 1544. The holy church of Megali Panagia, in Samarina, draws thousands of visitors during the 15th of August. The Holy Church of the Assumption of the Mother of God in Tourniki.

Kozani: The church of Agios Nikolaos, constructed in 1721, which is also the Cathedral. It was built on the site of an older church, and that's the reason there is a wood-carved iconostasis inside it of a unique style and an embroidered epitaph from 1672. In 1855, the seven-story bell tower was built, which is still a reference point of the city.

5.2.4. Sports and Adventure Tourism

The Region of Western Macedonia presents great potential when it comes to sports tourism due to its geomorphic diversity. An area filled with mountains, lakes, and rivers and home of three ski resorts, hiking, trekking, climbing routes and many more activities.

There are 6 mountain refuges in the region, ideal for hiking and/or climbing:

- Vounasa (1.415m), near Deskati, with a capacity of 70 sheltering people
- Mpara (1.945m) near the Flampouro summit, with a capacity of sheltering 80 people
- Lagomana (1.450m), in Pieria through Palaiogratsano (Velvento), with a capacity of sheltering 40 people
- Giaourtia (1.450m), in Pieria through Katafygi (Velvento), with a capacity of sheltering 30 people
- Tsilimigkas (1.000m), in Askio, with a capacity of sheltering 60 people
- Tsiamia (1.360m), in Vourino, with a capacity of sheltering 100 people.

Grevena also offers organized tours to visitors in activities such as rafting in Aliakmonas, canyoning in the canyons of Kleftis and Portitsa, and even zip lining at Venetiko Western Macedonia is home of three ski resorts in Florina (Pisoderi), Grevena (Vasilitsa), and Kastoria (Vitsi) which attract visitors during the winter.

Kastoria is known for its archery, cycling and pedal boat activities, whereas Grevena combines hiking with rafting, canoe-kayaking and even paragliding in Vounasa (Grevena).

There are numerous documented hiking trails in Western Macedonia of varying difficulty and duration. Due to the region's altimeter, hikers can enjoy great views and waters along the routes.

Ptolemaida, a town in Kozani provides dozens of horseback riding trips.

5.2.5. Wine and Gastronomy Tourism

The Region of Western Macedonia is an area with a rich viticultural tradition, which is in transition towards a model of sustainable development, capable of developing its own model of tourism development. The Amyntaio PDO (Protected Designation of Origin) viticultural zone has been recognized since 1972, while the Amyntaio EAS (Association of Agricultural Cooperatives) with its characteristic concrete tanks was the first organized winery, created in 1959. The zone today has many wineries¹², hundreds of winegrowers and grows on an area of 8,000 acres, with increasing trends. Florina: Famous local products such as beans, peppers, mushrooms, strawberries and plums.

Amyntaio: Three restaurants awarded with a golden cap in the area

Grevena: Pies, local pasta, cheese products, varieties of mushrooms

Kozani: Visiting the production of Kozani Saffron, a protected designation of origin (PDO) product which is almost 100% exported to other countries, known to be one of the most expensive herbs worldwide.

5.2.6 Eco Tourism

Western Macedonia's terrain exhibits significant variations in its morphology with multiple mountain masses like Pindos, Vora, Vermio, Pieria, Askio, Grammos, Vourinos, and others. Around 82% of the region's territory is characterized by mountains and semi-mountainous landscapes, while the remaining 18% comprises lowland areas. Flat and highly productive agricultural lands are scarce. However, notable exceptions include Grevena, where forests cover approximately 50% of the area, and Florina, which has a significant proportion of water areas due to its water resources including lakes and rivers ideal for eco-tourism. Aliakmonas river is 285 km long, and originates from Voio and its lake Kastoria and empties into Thermaikos gulf. Its main tributaries are Drabutiotikos, Grevenitis, and Venetikos. Lakes include the artificial Lake Servia in Kozani, Lake Orestia in the Division of Kastoria, Lake Vegoritida, Lake Petron and large small Prespa lakes located in the border region of Greece and Albania.

¹² 7 of them are certified for visitation under the recently introduced "Visitable Winery" Ministry of Tourism badge.

The presence of abundant protected areas in the region of Western Macedonia highlights valuable opportunities for the expansion of eco-tourism. Indicatively, these areas in the region are designated and governed by both national and international legislation:

- 10 Special Management Zones,
- 6 Special Protection Zones,
- 2 Protected areas of Law 3937/2011 (National Forest Park, Prespa and Kastoria Lake Nature Protection Area),
- 1 National Park (Prespa National Park),
- 1 Preserved Natural Monument (The Mixed Forest of Grammos),
- 1 Wetland of International Importance (Lake Mikri Prespa) and,
- 7 Traditional settlements

5.2.7. Geo Tourism

The international Network of UNESCO Geoparks has, as its main purpose, the inclusion as its members of all geographical areas of the Earth where the geological heritage is at the center of actions for environmental protection, education and local development. It was founded in June 2004 and today includes 111 locations in 32 countries. In western Macedonia, part of the network is the Grevena-Kozani geopark which is characterized by:

- The oldest rocks of Greece
- Important sites showing the birth of Europe
- Critical site locations for the development and proof of the theory of plate tectonics
- Geomorphological areas of natural beauty that resulted from the ancient action of tectonic plates and the most recent ice age
- The basis for the past environment that was home to rare mastodons and prehistoric creatures.

6. Tourism Demand

6.1. Flight Arrivals:

Tourist arrivals in the Regions of Epirus and Western Macedonia seem to be rebounding after the negative impact of the Covid-19 closures but still remain below their 2019 levels. More specifically passengers' arrivals in the regions' 4 airports (Kastoria, Ioannina, Kozani and Aktion¹³) have reached a combined 31.953 for the year 2021 which represents 0.6% of total domestic travels for the whole country. The majority of those arrivals (75,6%) concern the airport of Ioannina which seems to handle the bulk of domestic passengers for the region.

Passenger Arrivals from Domestic Flights	2016	2017	2018	2019	2020	2021
Kastoria	2.885	2.294	1.960	1.605	661	1.093
Ioannina	48.083	43.775	44.009	50.552	17.521	24.155
Kozani	1.777	1.674	1.955	1.886	714	1.090
Aktion	9.440	6.427	4.393	4.096	2.667	5.615
Total Domestic arrivals in Airports of Focus	62.185	54.170	52.317	58.139	21.563	31.953
Total Domestic arrivals in Greece	7.812.566	8.182.823	8.458.709	8.512.489	3.434.370	5.205.793
No. of Domestic Arrivals in Epirus	57.523	50.202	48.402	54.648	20.188	29.770
# of Domestic Arrivals in Western Macedonia	4.662	3.968	3.915	3.491	1.375	2.183
Pct of Total Domestic Arrivals	0,80%	0,66%	0,62%	0,68%	0,63%	0,61%

Source: Ministry of Tourism: Statistical Data of Greek Tourism¹⁴, own calculations

Concerning international passenger arrival, the airport of Aktion is undoubtedly the most frequent destination, hosting more than 95% of the total international passengers arriving in the region via plane connections. Compared to domestic passengers, the region seems to hold a greater percentage of the national total in international arrivals at 1.47% with 186.950 arrivals for 2021 down from 307.263 in its peak in 2019.

Passenger Arrivals from International Flights	2016	2017	2018	2019	2020	2021
Kastoria	109	47	125	258	-	-
Ioannina	3	3.213	9.780	14.703	4	6.570
Kozani	-	-	-	-	-	-
Aktion	226.308	270.825	273.307	292.302	77.192	180.380
Total International arrivals in Airports of Focus	226.420	274.085	283.212	307.263	77.196	186.950
Total International arrivals in Greece	18.634.235	20.822.013	22.752.820	23.606.801	6.431.907	12.748.718
No. of International arrivals in Epirus	226.311	274.038	283.087	307.005	77.196	186.950
No. of International arrivals in West Macedonia	109	47	125	258	-	-

¹³ Aktion airport is not officially part of the Epirus region but due to its geographical proximity to Preveza in Epirus it makes its inclusion in our analysis significant.

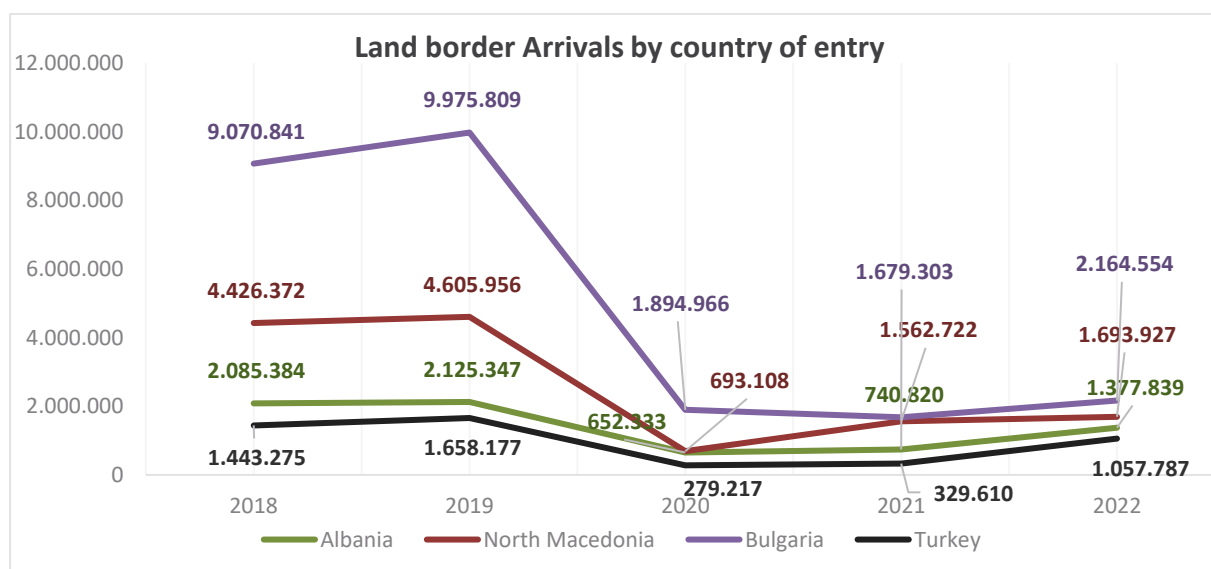
¹⁴ https://public.tableau.com/views/Final_GR/-?%3AshowVizHome=no

Pct of Total International arrivals	1,22%	1,32%	1,24%	1,30%	1,20%	1,47%
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Source: Ministry of Tourism: Statistical Data of Greek Tourism¹⁵, own calculations

6.2. Land Border Crossings

Greece shares land borders with Albania, North Macedonia, Bulgaria and Turkey. The 4 land border crossings in the ALTTOUR area exhibited decreasing trends in the pandemic period. More specifically from the peak of 2.125.347 arrivals in 2019 only 652.333 and 740.820 crossings were registered for 2020 and 2021 respectively with the total number rebounding at 1.377.839 in 2022. This rebound in border crossings of the ALTTOUR area is not characteristic of the other land borders of the country and as a result even with lower arrivals during 2022 the region has a share of 21.89% of all land border arrivals in the country. The same number was 11.57% for 2019 the year the land borders of Greece and Albania reached their peak total number (2.125.347 arrivals). This highlights the resilience of the land border crossing between Albania and Greece which constitutes of a significant number of Albanian populations that are living in Greece and regularly commute to their home country - Albania. These populations use the border crossings more often as compared to tourists that are more prevalent in the Bulgarian border which have been significantly reduced from their long run levels after the pandemic and the war in Ukraine. As such they constitute a special target group whose size warrants tailor made approaches to attract them as tourists during their yearly homeland visitation trips.



Source: Ministry of Tourism: Statistical Data of Greek Tourism¹⁶, own calculations

6.3. Sea Arrivals:

¹⁵ https://public.tableau.com/views/Final_GR/-?%3AshowVizHome=no

¹⁶ https://public.tableau.com/views/Final_GR/sheet45_1?%3AshowVizHome=no

Sea arrivals in the ALTTOUR region are only limited to the ports of Epirus as Western Macedonia is the only Greek Region without sea exposure, and therefore registers no sea arrivals. In Epirus the only commercial and passenger harbor is located in the north-eastern city of Igoumenitsa which connects Greece with destinations in Italy. A smaller port also exists in Preveza but it is specialized in hosting small boats and yachts, primarily, during the summer season. The statistics of sea arrivals are presented in the following table:

Sea Arrivals by Region	2020	2021	2022
Epirus	404.844	574.112	315.402
Greece	20.082.761	25.420.069	12.292.333
Percentage of Greece	2,02%	2,26%	2,57%

Source: Ministry of Tourism: Statistical Data of Greek Tourism¹⁷, own calculations

There were 315.402 sea arrivals in the region of Epirus during the first half of 2022, while recording an increase in its share of sea arrivals compared to the nation's total, with percentages of 2.02% in 2020, 2,26% in 2021 and 2,57% during the first semester of 2022. As such, it is clear that the region receives only a minor portion of sea tourists compared with the rest of Greece perhaps indicating untapped potential for further expansion. A similar image emerges from the examination of cruise ship arrivals, where the percentage of 0,26% (of total cruise ships arrivals in Greece) in 2018, dropped to 0,04% in 2021 with some variation in the intermittent years as presented on the table below.

Sea Arrivals by Cruise Ships	2016	2017	2018	2019	2020	2021
Igoumenitsa	7623	9088	12650	1053	102	558
Parga	0	0	0	1084	0	0
Preveza	556	0	0	0	0	0
Greece Total	5204231	465363	4788642	552384	67528	1418315
Pct of Total Greek	0,16%	0,21%	0,26%	0,04%	0,15%	0,04%

Source: Ministry of Tourism: Statistical Data of Greek Tourism¹⁸, own calculations

6.4. Duration and expenditures of visits

Epirus recorded 1.46%-1.95% of total national overnight stays during 2016-2022, with its peak performance (1.95%) during the pandemic in 2020. Accordingly, Western Macedonia documented 0.41%-1% of total national overnight stays, with its peak performance in 2020. 2022 had poor results for both regions, seeing a 21% decrease for Epirus and a 36% for Western Macedonia compared to 2019, the last year before Covid-19 measures were implemented.

¹⁷ https://public.tableau.com/views/Final_GR/sheet43?%3AshowVizHome=no

¹⁸ https://public.tableau.com/views/Final_GR/sheet41?%3AshowVizHome=no

Number of overnight stays (in thousands)	2016	2017	2018	2019	2020	2021	2022
<i>West Macedonia</i>	1.475	858	1.315	1.519	643	1.002	971
<i>% of total</i>	0,77%	0,41%	0,58%	0,65%	1,00%	0,76%	0,45%
<i>Epirus</i>	3.621	3.643	3.362	4.002	1.247	1.971	3.178
<i>% of total</i>	1,90%	1,74%	1,48%	1,72%	1,95%	1,50%	1,46%
<i>Greece</i>	190.401	209.855	227.012	232.463	64.053	131.357	216.948

Source: Bank of Greece, Tourism Services Balance of Payments¹⁹, own calculations

Despite the decrease in visits, Epirus performs well compared to the national average on money spent per overnight stay. When regions containing islands are excluded, Epirus leads the nation in money spent per overnight stay for 2022. In the same year, Epirus outperformed the national average of money spent per overnight stay by 3%. Western Macedonia, on the other hand, underperformed by as much as 50% in the same category.

Money (€) spent per overnight visit	2016	2017	2018	2019	2020	2021	2022
<i>West Macedonia</i>	45,9	52,3	46,0	49,7	41,7	37,8	50,2
<i>% of National Avg</i>	68,57%	88,07%	69,72%	76,19%	63,49%	58,58%	61,24%
<i>Epirus</i>	60,1	59,4	66,0	65,3	65,7	64,5	81,9
<i>% of National Avg</i>	89,82%	87,76%	95,72%	85,85%	97,70%	82,00%	102,94%
<i>National Avg</i>	67,0	67,7	69,0	76,1	67,3	78,6	79,5

Source: Bank of Greece, Tourism Services Balance of Payments²⁰, own calculations

As concerns the average nights spent during visits, Epirus records a decreasing trend, with the average nights stayed dropping every year from 2016 to 2022 reaching 2.9 and always performing lower than the national average in this metric. In contrast, Western Macedonia surpassed the national average by 3 days per visit during 2021, and documented almost double the amount of Epirus in 2022 with 5.6 nights per visit which is, however still lower than the national average.

Average number of nights stayed	2016	2017	2018	2019	2020	2021	2022
<i>West Macedonia</i>	4,5	3,9	3,8	5,0	8,9	11,3	5,6
<i>Epirus</i>	5,1	5,1	4,1	3,9	4,7	4,6	2,9
<i>National Avg</i>	6,7	6,8	6,5	6,3	7,7	8,0	6,9

Source: Bank of Greece, Tourism Services Balance of Payments²¹, own calculations

6.5 Annual hotel occupancy

¹⁹ <https://www.bankofgreece.gr/statistika/ekswterikos-tomeas/isozygio-plhrwmwn/taksidiwtikes-yphresies>

²⁰ <https://www.bankofgreece.gr/statistika/ekswterikos-tomeas/isozygio-plhrwmwn/taksidiwtikes-yphresies>

²¹ <https://www.bankofgreece.gr/statistika/ekswterikos-tomeas/isozygio-plhrwmwn/taksidiwtikes-yphresies>

The number of overnight stays in hotels varies between the two regions, with Epirus averaging up to 4.5 times more annual overnight stays in many cases. The main difference appears to be Western Macedonia's reliance on domestic tourism and weakened attraction of foreign visitors. As a part of the nation's total overnight stays in hotels, both regions constitute a small portion of national totals, with Epirus accounting for approximately 1.4% and Western Macedonia for 0,3% of total overnight visits in the country.

Hotel occupancy, measured according to the number of beds, is underperforming in both regions compared to the national average, with Western Macedonia averaging approximately 1/6 of beds occupied annually while Epirus documents just over 1/4.

Hotel occupancy and visitation		2016	2017	2018	2019	2020	2021
Western Macedonia	Foreign visitors overnight stays in hotels	32.502	50.945	71.371	54.593	18.207	22.027
	Domestic Visitors overnight stays in hotels	237.401	243.503	268.788	258.210	121.843	145.642
	Total hotel overnight stays in hotels	269.903	294.448	340.159	312.803	140.050	167.669
	% of National overnight stays in hotels in	0,34%	0,34%	0,31%	0,29%	0,46%	0,29%
	Hotel occupancy rate	15,9%	17,2%	17,8%	15,3%	12,8%	15,8%
Epirus	Foreign Visitors overnight stays in hotels	327.724	420.220	665.317	707.084	155.309	276.790
	Domestic Visitors overnight stays in hotels in	628.900	678.982	885.153	851.901	483.319	526.341
	Total hotel overnight stays in hotels	956.624	1.099.202	1.550.470	1.558.985	638.628	803.131
	% of National overnight stays in hotels	1,20%	1,25%	1,42%	1,43%	2,10%	1,38%
	Hotel occupancy rate	27,9%	30,6%	30,4%	29,8%	20,6%	26,4%
Greece	Total overnight stays in hotels	79.885.024	87.628.373	109.458.724	109.206.980	30.376.164	58.344.644
	Hotel occupancy rate	50,1%	51,9%	50,6%	48,7%	29,6%	42,9%

Source: ELSTAT, INSETE Intelligence²², occupancy measured by number of available beds in hotels

6.6 Museum and Archeological Site Visits

Museums in Western Macedonia saw a steady rise in visits from 2016 to 2019, but experienced a decline in 2020 before showing some improvement in 2021. In contrast, the Epirus region

²² <https://insete.gr/perifereies/>

consistently had higher museum visitation, reaching its peak in 2018, and then witnessing a significant drop in 2020 due to Covid-19, followed by a notable recovery in 2021.

Museum Visits per Region	2016	2017	2018	2019	2020	2021
Grevena (Church of the Assumption of the Virgin Mary)	188	200	261	180	81	155
Kastoria	2.013	3.906	5.942	7.039	1.757	3.199
Kozani	4.473	5.744	6.438	7.670	2.359	3.131
Florina	1.853	1.486	1.691	1.693	434	1.076
Total Western Macedonia	8.527	11.336	14.332	16.582	4.631	7.561
Arta	7.392	10.304	9.963	12.080	3.908	5.200
Thesprotia	5.420	4.274	4.803	2.992	1.089	1.306
Ioannina	34.194	37.024	42.740	35.414	9.147	18.800
Preveza (Nikopolis)	7.247	6.775	7.770	8.570	2.020	3.940
Total Epirus	54.253	58.377	65.276	59.056	16.164	29.246

Source: Ministry of Tourism: Statistical Data of Greek Tourism²³, own calculations

While Western Macedonia has a well-established presence in terms of museum visits, the region seems to have relatively fewer visitors exploring its archaeological sites. In contrast, Epirus stands out as a popular destination for tourists, particularly due to the significant number of visitors to the archaeological sites in Ioannina and Preveza.

Archeological Sites Visits per Region	2016	2017	2018	2019	2020	2021
Kastoria (Argos Orestiko)	1.335	627	1.338	1.175	122	768
Kozani	-	-	42	18	181	32
Florina	983	636	630	743	265	183
Total Western Macedonia	2.318	1.263	2.010	1.936	568	983
Thesprotia	674	1.299	686	1.679	381	1.542
Ioannina (Dodoni)	42.512	37.106	44.638	45.069	10.985	18.570
Preveza (Acheron "Nekromanteion", Nikopolis, Kassopi)	38.010	41.281	45.727	41.723	18.273	26.620
Total Epirus	81.196	79.686	91.051	88.471	29.639	46.732

Source: Ministry of Tourism: Statistical Data of Greek Tourism²⁴, own calculations.

²³ https://public.tableau.com/views/Final_GR/sheet48?%3AshowVizHome=no

²⁴ https://public.tableau.com/views/Final_GR/sheet50?%3AshowVizHome=no

7. Mapping of stakeholders in the ALTTOUR region

The ALTTOUR project's stakeholder mapping in the context of Greece aims to shed light on the various organizations—public, private, academic, and civil society—that hold significant connections to the project and possess the potential to influence future endeavors and policies associated with it. This mapping process involves two key stages: a) the identification of potential stakeholders and b) the subsequent evaluation using a stakeholder analysis matrix.

The stakeholder analysis matrix employs a comprehensive approach by considering both the actions and statutory position of each organization under scrutiny. By utilizing preselected criteria, it assesses the organization's relationship with the ALTTOUR program. In our case, the two main criteria employed are the importance of the organization and its influence.

The importance of an organization, in the context of this project, can be examined by evaluating the degree of alignment between its statutory mission and the goals of the project. Such alignment indicates a shared interest in the successful implementation of the project. On the other hand, influence refers to the stakeholder's ability to impact project outcomes and promote policies or actions that align with the project's objectives.

Through the evaluation of each stakeholder's importance and influence, we can comprehend their overall value to the project and devise strategies to approach, engage, and inform them effectively. This comprehensive stakeholder mapping includes organizations from the quadruple helix, which encompass academia-research, businesses, public bodies, and civil society entities. Each stakeholder is assessed based on the following factors for each criterion:

1) Influence:

- a) Does the organization have the tools and incentives to exert political influence and pressure in favor of the project?
- b) Does the organization implement policies of promoting Tourist areas/products/services?
- c) Does the Organization collect and record or analyze quantitative statistics on Tourist flows in the region, including data on Spa Tourism?
- d) Does the organization have the ability and competence to design or propose and implement new Tourism policies and programs?
- e) The organization manages/implements/coordinates Regional and Sectoral Operational Programs of the NSRF that include actions related to tourism, the

promotion and promotion of culture, the competitiveness of tourism businesses, the diversification of the tourism product, etc.

2) Importance:

- a) Does the organization have the authority to make decisions that can affect balneary/spa tourism?
- b) Does the organization understand, by statute, the general strategic framework of balneary/spa tourism outside the narrow local boundaries?
- c) Does the organization specialize in the local context of utilization/management and promotion of balneary/spa tourism?
- d) Has the organization formulated and implemented cross-border cooperation programs with Albania?
- e) Does the organization have members that provide tourism, catering or hospitality services in Epirus or Western Macedonia?

The type of engagement that will be selected for each stakeholders needs to follow the assessment based on the two axes of influence and importance. However, the following principles should always be taken under consideration when it comes to engaging with any stakeholder, particularly priority ones.

- Build relationships based on the stakeholder analysis; while it is important to be practical, do not just engage with those with whom relationships already exist.
- Aim to involve stakeholders throughout the project - but do not overwhelm them with information, requests, etc.
- Understand stakeholders (beyond influence and importance): what motivates them, what incentives do they have and what are their constraints?
- Ensure that communications are tailored to a particular stakeholder audience and are well-timed.
- Follow stakeholder engagement plans and also be prepared to exploit opportunities that suddenly present themselves.
- Provide adequate resources for stakeholder engagement and monitor, adapt and evaluate engagement activities.
- Always think about how unequal power relations affect stakeholders and beware of co-option and conflict of interests.

The table below lists the main stakeholders within the ALTTOUR project, their evaluation in the criteria of influence and importance as well as appropriate communication/engagement policies and ways of cooperation.

Stakeholder Category	Stakeholder Type	Stakeholder	Influence	Importance	Score	Engagement
Central Government	Ministries	Ministry of Tourism	a, b, d, e	a, b, d	4,3	Actively Engage in decision making
		Ministry of Culture				
Regional and Local Governments	Regional Governments	Region of Western Macedonia	a, b, c, d, e	a, c, d	5,3	Actively Engage in decision making, Keep satisfied and fully and timely informed
		Region of Epirus				
	Regional Units Governments	Regional Unit of Kastoria	a, b, c, d, e	a, b, d	5,3	Actively Engage in decision making, Keep satisfied and fully informed
		Regional Unit of Ioannina				
		Regional Unit of Preveza				
		Regional Unit of Florina				
		Regional Unit of Arta				
		Regional Unit of Thesprotia				
	Municipalities	Argos-Orestiko	a, b, c, d, e	b, e	5,2	Actively Engage in decision making, Fully and timely inform.
		Konitsa				
		Preveza				
		Aminteo				
Arta						
Igoumenitsa						
Private Sector	Chambers of Commerce	Kastoria	a, c, e	b, e	3,2	Keep Informed and monitor initiatives.
		Ioannina				
		Preveza				
		Florina				
		Arta				
		Thesprotia				
	Tourist Operators Associations	Kastoriatours	b, c	b, c, d, e	2,4	Inform and manage closely
		Tourist Enterprises of Ioannina				
		Alfadakis Travel				
		Gaiganis Travel				
		Houliaras Tours				
		Barkabas Travel				
	Catering Associations	Association of Pamvotis	b	e	1,1	Monitor
Academia	Universities	University of Ioannina	a, c, e	b, c, d	3,3	Inform and Monitor

Stakeholder Category	Stakeholder Type	Stakeholder	Influence	Importance	Score	Engagement
Civil Society	Development Agencies	Development agency of Epirus	a, b, d, e	b, c, d, e	4,4	Actively Engage in decision making, Keep satisfied and fully informed
		Hellenic Association of Municipalities with Thermal Springs				
		New Municipal Kinofelis Enterprise of Preveza				
		Development Agency of Kastoria				

8. Internal assessment of the healing springs

Under this section, we discuss the findings derived through primary research methods (questionnaires, interviews and focus group) as regards the existing situation around the healing springs of the Greek ALTTOUR area. These findings are of great importance to the project as they reflect the opinions, knowledge and judgements of the local actors and stakeholders who are in daily contact with the opportunities/issues that are present in the region. In total 15 complete questionnaires were collected from local stakeholders while 6 interviews were conducted with management authorities of healing springs. As a final stage one focus group was conducted with the participation of regional authorities, the Hellenic association of municipalities with thermal springs and representatives of the tourism industry.

8.1 Primary research findings:

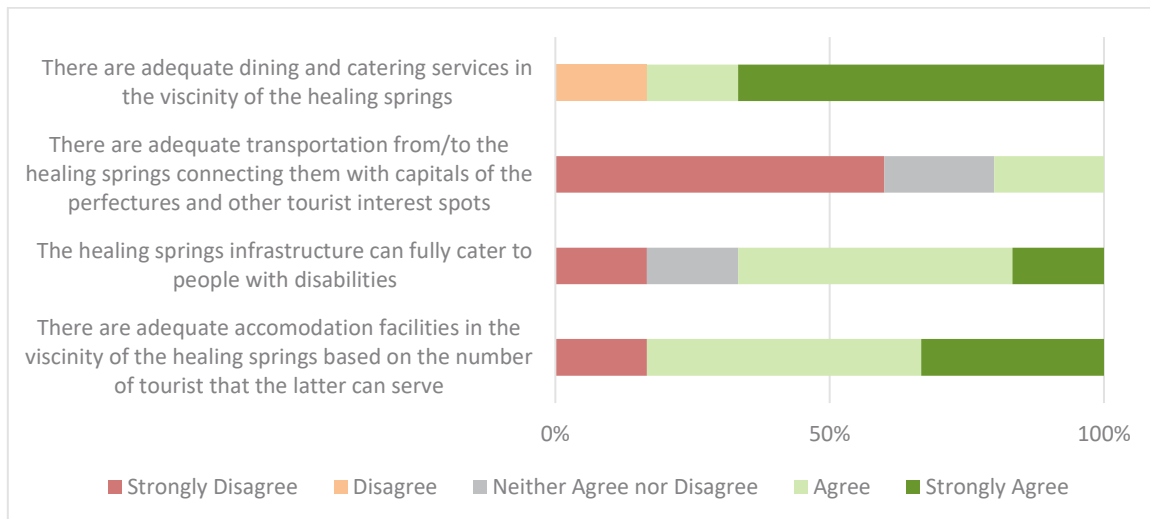
As previously discussed, two questionnaires with great similarities were collected with the first one targeting healing springs' management authorities and the second targeting stakeholders. The management authorities' questionnaire inquired with a focus on the side of infrastructure capacities and customer visitation patterns while also probing for opinions, on the overall state of the spring, through 5-scale Likert questions. The questionnaire targeting stakeholders contains primarily 5-scale Likert questions designed while the stakeholders' questionnaire

Tourist visitors throughout all the springs are predominantly Greek and over the age of 55:
The demographics of visitors to all the selected springs seem to be identical with the majority of their customers being older Greeks. All springs responded that non-Greek visitors are less than 10% of the total with the healing springs of Kivotos indicating no foreign visitors at all. After inquiries during the interviews conducted this was primarily blamed in the very low visibility and promotion of the specific spring abroad but also in Greece, with even nearby cities and villages not being aware of the spring's existence. Among the few foreign visitors to the springs, the primary origin countries are Germany, the UK and Israel. When asked whether they register and catalog visitation data, the responses indicate that this does not happen for 3 of the springs while it does for Amarandos, Preveza and Ammoudara. The difference can be explained by the open nature of the facilities of the 3 springs that don't record visits where visitors can come and go based on their own schedule without requiring admission or any other check. During the focus group discussion, participants strongly commended on the fact that the healing springs tourist product of Greece, has to be

redesigned and re-promoted in a completely different way from what has been done so far. More specifically, participants allude to the fact that almost all healing springs in Greece have based their success on their Greek clientele which consists, historically, of older Greek individuals traveling to the springs on the government's medical insurance benefits which include cost free visitation to the springs paid by social security funds. This phenomenon reached its peak in the 60s-70s and 80s but has since consistently been reduced, based on the progressive cuts on the fund allocation from the government to cover healing spring bathing through social insurance. Following the substantial budget cuts of following the Global and Greek Financial crises of 2008 and 2009, the remaining Greek tourism struggles to keep the healing springs operational and sustainable, a fact more relevant to the "isolated" springs of the ALTTOUR region, than the ones closer to major metropolitan centers (e.g. Aidipsos in Evoia).

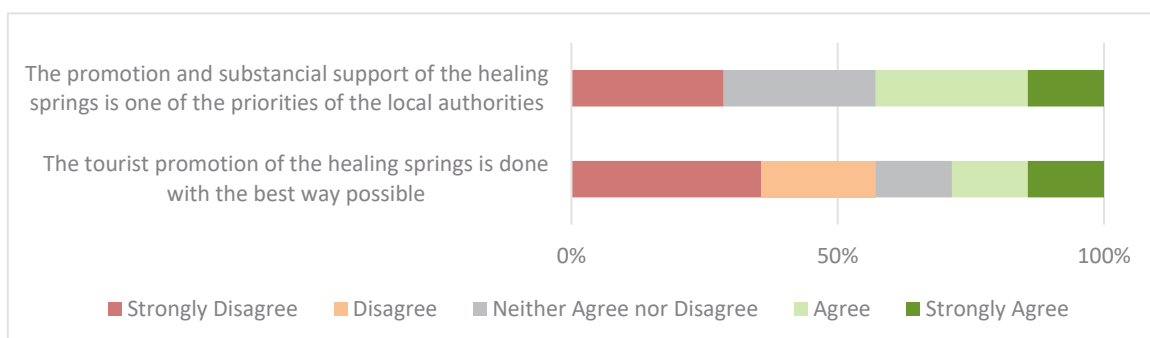
Supporting services and infrastructure could be further improved in certain springs, if the region is to further develop its healing springs tourist product: Perhaps the most abundant supporting industry, as indicated through the questionnaire is dining and catering followed by accommodation. Only the spring of Kivotos has identified the need for further accommodation options which are, at the moment, very limited in the vicinity of the springs. The same image is encountered when dining and catering is concerned, with all the springs besides Kivotos indicating sufficient number of restaurants around their springs. At the same time, the need to improve the accessibility of the infrastructure for visits by people with special needs is evident. Major needs for improvement in terms of transportation have been identified in all cases besides Preveza (whose springs lie inside the city limits) and Kavasila. Another concerning point is that in their majority (all besides Ammoudara), healing springs managing authorities consider that there is very limited personnel in the adjacent area that could be employed in the provision of supplementary tourist services in the springs²⁵, should the opportunity arise.

²⁵ Examples of those would be, physiotherapists, massagers, yoga instructors etc.



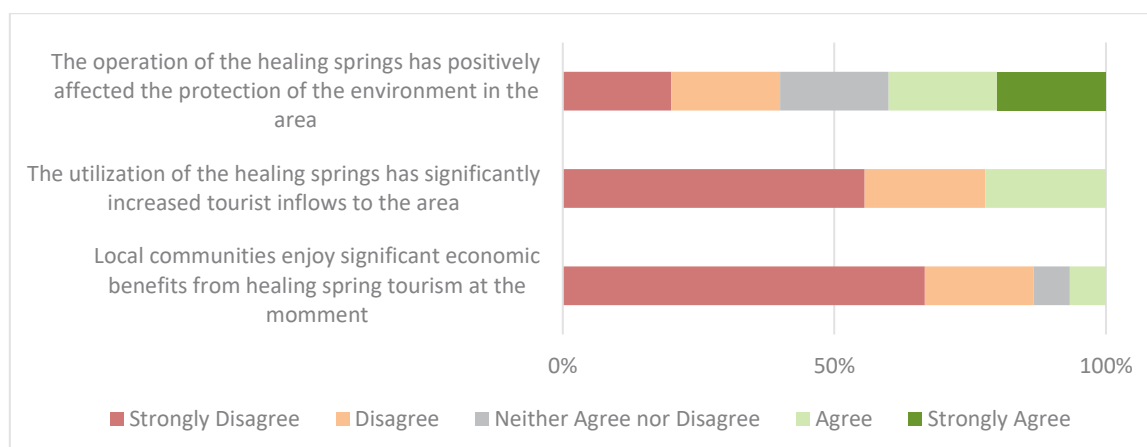
Furthermore, on this topic, focus group participants indicated that even in the case of accommodation and catering, the past 2 years have seen significant closures in quality hotels and restaurants which if not reversed could create problems in the near future. In overall, even if current supporting services are present and adequate, participants noted that any substantial increase in tourist inflows will require the expansion of providers of accommodation, dining and especially transportation which is already quite lacking.

The promotion of the springs seems to be done in a fragmented way with very few efforts to combine them with other tourist offerings of the area: In most cases (4/6) the respondents indicated that the promotion efforts are very limited while besides Kivotos Spring, no other managing authority indicated efforts to combine the springs to other tourist attractions. Even in Kivotos the experience was that of an ad-hoc effort to promote them with the opening of a nearby museum (Museum of natural history of Milia) that even the good impressions it left, was never replicated in any way. Despite this however, 4 out of 6 managing authorities agreed that the promotion of the healing springs is in the priority of local and regional governments with Kivotos and Amarandos indicating a neutral opinion on this topic.



The focus group discussion also focused on this point by commenting on the recent governmental efforts to introduce DMOs (Destination Management Organisations) to the Greek Tourism Industry. Currently, small and medium sized municipalities and prefectures, as was claimed, do not have the personnel capacity to lead destination management efforts and establish DMOs at the ALTTOUR region. Alternatively, all participants agreed that the formation of DMOs can change this and is the ideal way for Greek Tourism in general to evolve. However, they noted difficulties observed with the formation of the first Greek DMOs in Epirus and Sterea Ellada and the diverging approaches that were taken. All participants commended on the need to enshrine a “collaborative” attitude both in the municipal and the peripheral level in any efforts that concern the further promotion of the tourist product including the healing springs.

Local communities are currently failing to reap any tangible benefits from the presence and operation of the healing springs: There is very limited support from current interviewees to the notion that positive economic spillover effects are experienced in the local community from the operation of the springs. The answer to this question presents the most homogenized response than any other questions with over 65% stating that they strongly disagree with the existence of such benefits for local communities. Additionally, there is only very limited support towards the idea that the operation of the healing springs, as it has been so far, has attracted tourists to the area. The only supporters of this notion are institutions from Preveza perhaps indicating a better integration of the Healing springs in the tourism strategy of the city.



Infrastructure upgrade and creation of new tourist offerings which combines the healing springs with other types of tourism in the area have been identified as the most significant interventions: More specifically from the answers collected there is correlation between the

level of current infrastructure and what managing authorities consider as a more pressing need. Springs that offer self-perceived -adequate infrastructure- (Ammoudara, Kavasila, and Amarantos) wish for better integration in tourist offerings while those that face critical infrastructure shortages (Preveza, Agrapidia, Kivotos) prioritize their development. During the focus group discussions however, much more emphasis was given to the infrastructure upgrades that are needed in some springs while also pointing out the consistent collaborative promotion through, ideally, the formation of DMOs as the second more important element for the industry. This is not so much in contrast with the questionnaire findings as focus group participants also failed to remember and provide examples of integrated tourist offerings in the past, a process that, as they claim, lies at the core of the operational goals of DMOs.

9. PESTLE Analysis

Following the collection of data and insights from regional and local stakeholders as well as the secondary research conducted, we employ a PESTLE analysis in order to provide a comprehensive understanding of the political, economic, social, technological, legal and environmental factors that shape the business environment in which the healing springs operate.

Political Factors:

- There is increased interest and central government support in the development of the healing springs of the area of the ALTTOUR region. Sustainable tourism is the focus of the Ministry of Tourism which seeks to achieve it through the promotion of alternative forms of Tourism like wellness tourism.
- Regional authorities in Epirus have managed to incorporate EU and Greek funds in order to facilitate infrastructural upgrades to the healing springs which are currently undergoing and are expected to raise the quality of the tourist product offered.
- In the local level, municipalities are expressing vested interest in the further development of the healing springs but point to significant efforts needed that are currently beyond their capabilities in terms of personnel.

Economic Factors:

- Tourism in the two regions under consideration has struggled to attract visitors in the magnitude that other regions in Greece have.
- Average daily expenditures of tourists are much lower in Western Macedonia at just 61.2% of the Greek average. On the contrary Epirus which is able to combine "Sun and Sea" services and attracts a higher number of visitors performs better by surpassing the average daily expenditures of Greece in total by 3%. This finding for 2022 highlights the impact of tourism development in Epirus which in previous years consistently recorded lower daily expenditures than the national average.
- Infrastructure around and in the healing springs presents variation. Healing springs such as Preveza, Chanopoulo and Amarandos and Kavasila are undergoing renovations that are funded through EU co-funded programmes (Interreg). However due to the impact of Covid-19 a lot of supporting services (accommodation, dining, transportation) which have seen business closures, might struggle to keep up with

increased tourist inflows. However, the expected rise in the tourist appeal of the region can provide more potential local and international investors.

- The operation of the healing springs so far has had a mediocre to negligible impact to local communities in terms of employment. The integration of more services such as massages, health check ups and other recreational activities connected to wellness can change this by offering more opportunities of employment in the area. A significant aspect of this will be the attraction of specialized and skilled workers who are currently lacking in the region.

Social Factors:

- Health and Wellness global trends indicate an emerging tourism industry while the Greek ALTTOUR region has a comparative advantage in wellness sights and activities with the natural wealth endowed in the region. This wealth has gradually started to be developed and better promoted but currently has limited connections with the healing springs.
- Local communities are supportive of the endeavors around healing spring tourism. Yet this support stems more from the fact that they can also enjoy the healing spring product rather than the negligible positive economic impact they currently experience.
- The healing springs of the area vary in the level of cultural significance they hold for local societies. Older springs discovered and developed during previous centuries, like Preveza, are an integral part of the cultural history of the areas around them and can be employed to attract visitors to traditional practices and beliefs. However other, newer and less developed springs might not possess a "cultural" relevance and could benefit greatly through integrated promotion along with other cultural points of interest in their vicinity.

Technological Factors:

- There is very limited digital presence of the springs. Their digital footprint is restricted to news articles about their development while visiting tourists can get limited information through online sources which primarily contains their address, contact telephone numbers and operational season. No information on working hours or the ability to make online reservations is available.
- Infrastructure technology used inside or in direct support of the springs is outdated but improvements are expected at least in Epirus due to the renovation efforts currently undertaken. Most of the springs also suffer from the lack of modern 4 star

and beyond accommodation options which usually accompany such structures in other country cases. However due to the overall tourist development of adjacent cities and destinations, such options do exist if tourists are willing to commute for more than 1 hour to and from the springs. The same stands for dining services which, in the case of more isolated healing springs can be lacking.

- Data management is still in its infancy amongst the healing springs. About half of the springs reported not recording any type of visitation data. This data has not been analyzed or employed in any way that would allow a deeper understanding of visitor preferences in order to improve services. Additionally, no feedback is possible from customers through available forms or digital ratings in all cases of the healing springs. In the case of the healing springs that do not record any data at all it is important to note that this reflects their infrastructure leading to an "open and free use" approach by anyone visiting the area with no oversight or even administrative presence possible (e.g. Kivotos and Kavasila springs).

Legal Factors

- No environmental regulations are in place that dictate the methods and actions needed to be undertaken to preserve the natural surroundings of the healing springs. All healing springs, regardless of the public or private nature of their management have to adhere to environmental regulation that applies to all business enterprises in Greece.
- The government has introduced the healing spring certification process which is essential for the operation and promotion of the springs and assists in both mapping the healing springs of Greece and providing commonly agreed information on the water's mineral composition, temperatures, indicative ailments for treatments and ailments with which visitation to the springs should be avoided. This provides a sufficient legal framework of certification.
- The ownership of the healing springs remains with the local municipalities who however have the ability to lease them out to private businesses. This has created issues with projects aimed at upgrading infrastructure as the leased ones (Chanopoulo and Amarandos) do not fall under programs' requirements for investment.

Environmental Factors:

- Natural conservation should be the number one priority of the healing springs in the ALTTOUR Greek area, as nature is one of its most significant offerings. Environmental

impact assessments are part of the obligations of any infrastructural works planned in the healing springs. As such there is no concerns about the spring's impact on the environment in most cases. However, the lack of formal investment opportunities has led some managing authorities to upgrade their infrastructure on an ad hoc way (Kivotos). This has led to the abandonment of the upgrades as they could not be further developed and upgraded as they were missing critical environmental impact assessments.

- The healing springs can play a critical role in terms of informing about climate change and protecting the local biodiversity but no such efforts have been documented so far.

In conclusion, the healing springs in the ALTTOUR region have significant potential for growth and development, supported by political interest, economic opportunities, and social trends. However, addressing technological limitations, improving data management, and ensuring compliance with environmental regulations are essential for their sustainable success. Emphasizing cultural significance and enhancing the economic impact on local communities will contribute to the overall growth of healing spring tourism in the region.

10. Conclusions

The mapping and assessment process of the healing springs on the Greek side of the Greece-Albania border provides useful information contributing to more efficient strategy planning for the future promotion of spa tourism in the ALTTOUR area.

Based on the analysis of the seven selected springs, there are several similarities and differences in their infrastructures, associated medicinal properties, and level of promotion. The key findings include:

Unique Natural Phenomena: Each spring possesses a distinct natural phenomenon that holds considerable interest for wellness and health tourism. These natural phenomena may include mineral-rich waters, unique geological formations, or geothermal activity. Moreso, this aligns perfectly with the region's overall touristic comparative advantage which comprises of alternative forms of tourism in connection with the region's majestic landscape and natural beauty as well as its rich and authentic culture. These elements present a valuable opportunity for further tourism development.

Underutilized Assets: Despite their potential, most of the destinations have not fully capitalized on the significant assets offered by the springs. This means, in the best cases, that they haven't been fully developed and promoted as integrated tourist destinations. In the worst-case scenario, already existing facilities have been abandoned or underutilized and there are no plans for their future development. Either way, the region is missing out on a lucrative market for wellness and health-conscious travelers.

Insufficient Facilities: One major finding of the analysis is, in the case of more isolated and remote springs, the lack of proper facilities at these destinations. Inadequate infrastructure, such as accommodations, spas, healthcare facilities, and recreational amenities, hampers the potential for attracting tourists seeking wellness experiences. Moreso, the facilities that do exist catered more to Greeks visiting the springs through health insurance packages which have been significantly reduced lately. It has been consistently claimed that infrastructural upgrades are needed to better align them with an international and alternative clientele.

Lack of integration with other tourist options: Another crucial aspect is the lack of integration with alternative tourist options. Successful tourist destinations often offer a variety of attractions and activities, creating a diverse and appealing experience for visitors. Springs that are isolated and not linked to other tourism offerings may struggle to attract a sustained flow of tourists.

Level of Urbanization: The level of urbanization around the springs can impact the overall tourism experience. Springs located in well-developed urban areas may have better

access to transportation, accommodation, and other amenities, while those in more rural or remote locations may face challenges in attracting and accommodating tourists.

Based on these findings, it is evident that there is a need for strategic planning and investment to fully utilize the potential of these springs for wellness and health tourism. Completing development of the necessary infrastructure, integrating them with other tourist attractions, and promoting their unique qualities are essential steps to transform these springs into successful and attractive tourist destinations. Fragmented, individual promotion efforts should be replaced by collaborations that bring to the table all the relevant stakeholders if the region is to stop underperforming in comparison to the rest of Greece in tourism demand related indicators.

11. Sources

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12. Appendix

12.1 Questionnaire #1: Healing Springs management Authorities

Welcoming text:

Welcome to the questionnaire recording the current state of the healing springs of Epirus and Western Macedonia as part of the "Alternative Tourism" (ALTTOUR) project. The ALTTOUR project is implemented by the Ministry of Tourism within the framework of the INTERREG IPA CBC GREECE-ALBANIA 2014-2020 Cooperation Program and aims to upgrade and jointly promote healing spring tourism of the Greek and Albanian cross border region. The questions you will be asked to answer are intended to capture the actual conditions in the healing springs and subsequently inform the design of further tourism services and policies to support healing tourism. Your answers will remain anonymous and will be used exclusively within the context of this project as defined in Law 3832/2010.

Completing the questionnaire is estimated to take you 5-10 minutes.

Thank you for your time.

Questions:

- 1) Sex: a) Male b) Female c) Other
- 2) Age: a) 18-25 b) 26-40 c) 41-54 d) 55-64 e) 65+
- 3) Level of Education:
 - a) Basic Education (Middle School)
 - b) Secondary Education (High School, Vocational school)
 - c) University or Technological Educational Institute (AEI, TEI)
 - d) Master's degree
- 4) Your profession is related to the thermal springs of:
 - a) Preveza
 - b) Amarantos
 - c) Ammoudara
 - d) Agrapidia
 - e) Kavasila
 - f) Chanopoulo
 - g) Kivotos
 - h) Xino Nero

5) How many individual baths are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

6) How many massage spaces are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

7) How many infirmary spaces are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

8) How many individual hydromassage spaces are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

9) How many **outdoor** pools are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

10) How many **indoor** pools are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

11) How many natural reservoirs are there in the thermal springs? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

12) What is the total capacity of the pools (indoor and outdoor) measured in people? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

13) What is the total capacity of natural reservoirs measured in people? (In case of current upgrades/renovations of the baths, please provide the number that will exist after the completion of construction).

14) How many visits were recorded during the last year of operation? (In case of no recordings, type 0)

15) The majority of visitors of the thermal springs are in the age group of:

- a) 18-30
- b) 31-55
- c) 55+

16) What are the three main non-Greek nationalities of the springs' visitors?

17) The percentage of non-Greek visitors of the springs is approximately:

- a) 0-10%
- b) 10-25%
- c) above 50%

18) Do you digitally record visitor traffic in the thermal springs of your location?

- a) yes
- b) no

Please fill in based on the level of agreement/disagreement of the following sentences:

	Totally Disagree	Partially Disagree	Neither Agree or Disagree	Partially Agree	Totally Agree
There is sufficient supply of accommodation based on the visitors of the thermal springs					
The thermal springs have infrastructures that make them completely suitable and accessible to people with special needs.					
There are sufficient (in terms of capacity and frequency)					

transport services to and from the thermal springs of the area, connecting them to the capitals of the regional units, and municipalities, as well as other points of tourist interest.					
There are sufficient catering options for visitors in the nearby areas of the springs					
Tourism promotion is done in the best available way					
In the past, efforts have been made to promote the thermal baths in conjunction with other tourist products and services of the region (wine roads, agro-tourism, etc.) or other thermal springs in the wider region.					
The promotion and substantial support of the region's thermal springs is a political priority of the local authorities.					
There are sufficient specialized professionals to provide upgraded spa services (such as masseurs, kinesiotherapists, physiotherapists, etc.) in the area ready to be employed if needed.					

The local economy is currently enjoying significant benefits from spa tourism.					
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12.2 Questionnaire #2: Stakeholders

Welcoming text:

Welcome to the questionnaire recording the current state of the healing springs of Epirus and Western Macedonia as part of the "Alternative Tourism" (ALTTOUR) project. The ALTTOUR project is implemented by the Ministry of Tourism within the framework of the INTERREG IPA CBC GREECE-ALBANIA 2014-2020 Cooperation Program and aims to upgrade and jointly promote healing spring tourism of the Greek and Albanian cross border region. The questions you will be asked to answer are intended to capture the actual conditions in the healing springs and subsequently inform the design of further tourism services and policies to support healing tourism. Your answers will remain anonymous and will be used exclusively within the context of this project as defined in Law 3832/2010.

Completing the questionnaire is estimated to take you 5-10 minutes.

Thank you for your time.

Questions:

- 1) Sex: a) Male b) Female c) Other
- 2) Age: a) 18-25 b) 26-40 c) 41-54 d) 55-64 e) 65+
- 3) Level of Education:
 - a) Basic Education (Middle School)
 - b) Secondary Education (High School, Vocational school)
 - c) University or Technological Educational Institute
 - d) Master's degree
- 4) Which body/organization/company do you represent?
- 5) The body/organization/company that you represent is:
 - a) Public body related to the thermal springs
 - b) Public body related to Tourism (including HORECA sectors)
 - c) Private tourist body
 - d) Private catering agency
 - e) Private accommodation agency
 - f) Non-governmental organization related to thermal springs

- g) Non-governmental organization related to tourism
- h) Academic

6) Your profession makes you well informed about the thermal springs of:

You can select more than one choice.

- a) Preveza
- b)Amarantos
- c) Ammoudara
- d) Agrapidia
- e) Kavasila
- f) Chanopoulo
- g) Kivotos
- h) Xino Nero

h) None of the Above

Please fill in based on the level of agreement/disagreement of the following sentences:

	Totally Disagree	Partially Disagree	Neither Agree or Disagree	Partially Agree	Totally Agree
Tourism promotion in the regions of Western Macedonia and Epirus is done in the best available way					
The promotion and substantial support of the region's thermal springs is a political priority of the local authorities.					
There are sufficient specialized professionals to provide upgraded spa services (such as masseurs, kinesiotherapists, physiotherapists, etc.) in the area ready to be employed if needed.					

The local economy is currently enjoying significant benefits from spa tourism.					
There are inclusive touristic packages that include visits to the springs of the area as a part of their main tourist services					
Promotion and utilization of the thermal springs has significantly increased the tourist flows to the area					
The operation of the area's thermal baths has had a positive effect on the protection of the area's environment					
The policies followed in recent years regarding the promotion of the thermal springs of the region and their promotion have significantly assisted to increase tourism for thermal purposes in the region.					

12.3 Questionnaire 1 contact report: 12.4 Questionnaire 2 contact report:

	Healing Spring	1 st Comm	2 nd Comm.	3 rd Comm	4 th Comm	5 th Comm	Interviewee	Title	Telephone	Outcome
1	Preveza	Municipality of Preveza phone 19/6/23	Leonidas Argyros, chairman of tourism promotion 6/21/23	Grigorios Koumpis, Deputy Mayor of Rural Development 6/22/23	Maria Skamnelou Koinofelis Prevezas 5/7/23		Grigorios Koumpis 5/7/2023	Deputy Mayor of Rural Development	Grigorios Koumpis 6948408377	Questionnaire Partially Completed ²⁶
2	Kavasila	Konitsa mayor's office phone 6/19/23	Mayor's Secretariat phone and e-mail 22/6/23	Mayor Nikos Exarchou phone and e-mail 28/6/23	Mayor Nikos Exarchou phone and e-mail 4/7/23		Kitsakis Ioannis 7/7/23	Special consultant of the mayor	Mayor's Office 2655360326	Questionnaire Completed
3	Amarantos	Kostas Ziakos Administrator tel. 19/6					Kostas Ziakos 21/6	Contractor Managing the Healing Spring	Ziakos 2655022012	Questionnaire Completed
4	Chanopoulo	Arta City Hall, phone 19/6/23	Thanasis Arkoumanis Arta Tourism Directorate phone and e-mail 21/6	Questionnaire forwarded to Christos Karapanos owner of springs	Christos Karapanos 3/7/23 and 5/7/23	Mayor's Office 6/7/23		N/A	Arkoumanis 2681362115 Karapanos 2681085197	Questionnaire not completed
5	Kivotos Spring	Grevena Municipality phone 19/6/23	Ioannis Ntolias Special associate of the mayor 19/6/23				Ioannis Ntolias 21/6/23	Special consultant of the mayor	Ioannis Ntolias 693246090	Questionnaire Completed
6	Ammoudara	Argos Orestiko Mayor's Office phone and e-mail 19/6/23	Argos Orestiko Mayor's Office phone and e-mail 23/6/23	Argos Orestiko Mayor's Office phone and e-mail 3/7/23	Fotios Tatsidis President of Argos Orestikos Koinofelis 3/7/23		Fotios Tatsidis 3/7/2023	President of Argos Orestikos Koinofelis	Mayor: 2467351301 Tatsidis 2467044412	Questionnaire Completed
7	Agrapidia	Mayor's Secretariat - phone 19/6/23	Petros Mpermperidis Deputy Mayor 20/6/23	Petros Mpermperidis Deputy Mayor 27/6/23			Petros Mpermperidis 27/6/23	Deputy Mayor	Petros Mpermperi dis 6984712027	Questionnaire Completed
8	Xino Nero	Mayor's Secretariat - phone 19/6/23	Petros Mpermperidis Deputy Mayor 20/6/23	Petros Mpermperidis Deputy Mayor 27/6/23			Petros Mpermperidis 27/6/23	Deputy Mayor	Petros Mpermperi dis 6984712027	Questionnaire Completed

²⁶ No data on the spring's capacities were provided since the springs are currently undergoing major renovations.

12.4 Questionnaire 2 contact report:

Regional GOVERNMENT ORGANIZATIONS						
REGIONS			Call	Email	Result	
	NAME	TITLE				
Region of Western Macedonia	Georgios Kasapidis	Regional Governor	1	26/6, 10/7, 19/7		Questionnaire Answered
Region of Epirus	Tesia Kaliopi	Head of EU funded Programmes	2	26/6		Participated in Focus Group
REGIONAL UNITS						
Kastoria	Despoina Kozatsani	Deputy Governor	3	26/6, 3/7, 7/7, 10/7, 18/7	26/6	Questionnaire Answered
Ioannina	Konstantinos Siaravas	Deputy Governor	4	26/6, 10/7, 18/7	11/7	Questionnaire Pending
Preveza	Efstratios Ioannou	Deputy Governor	5	26/6, 3/7	27/6	Questionnaire Pending
Florina	Sotirios Vosdou	Deputy Governor	6	26/6, 3/7, 10/7, 18/7	27/6	Questionnaire Answered
Arta	Vasilios Psathas	Deputy Governor	7	26/6, 3/7, 7/7, 18/7	27/6	Questionnaire Pending
Thesprotia	Thomas Pitoulis	Deputy Governor	8	26/6, 3/7, 18/7	27/6, 3/7	Questionnaire Pending
LOCAL BODIES - ORGANIZATIONS - ASSOCIATIONS						
CHAMBERS OF COMMERCE						
Kastoria	Mpampis Karataglidis	President	9	26/6, 10/7, 18/7	10/7	Questionnaire Pending
Ioannina	Dimitrios Dimitriou	President	10	26/6, 3/7, 7/7, 10/7, 18/7	26/6	Questionnaire Pending
Preveza	Ioannis Mpouris	President	11	26/6, 3/7, 18/7	27/6	Questionnaire Answered
Florina	Savvas Sapalidis	President	12	26/6, 3/7, 7/7, 10/7	N/A	No answer, email not in use
Arta	Ioannis Golomazos	President	13	26/6, 3/7, 7/7, 10/7	26/6	Questionnaire Answered

Thesprotia	Alexandros Paschos	President	14	26/6, 3/7, 10/7	3/7	Questionnaire Pending
TRADE ASSOCIATIONS						
Kastoria	Antonis Michou	Manager	15	26/6, 3/7	26/6	Questionnaire Answered
Ioannina	-	-	16	26/6, 3/7, 10/7	N/A	No response
Preveza	Karamanis Andreas	President	17	26/6	27/6	Questionnaire Answered
Arta	Houliaras Dimitris	President	18	26/6, 3/7, 7/7, 10/7	3/7	Questionnaire Pending
Thesprotia	-	-	19	26/6, 3/7, 7/7	N/A	No information found/ No response
HOTELIER ASSOCIATIONS						
Kastoria	Sideris Smaropoulos	President	20	26/6	26/6	Questionnaire answered
Ioannina	Stathis Sioutis	President	21	26/6, 3/7, 7/7, 10/7, 19/7	26/6, 3/7	Questionnaire pending
Preveza	Polykarpos Halkidis	President	22	26/6, 3/7, 10/7, 19/7	26/6	Questionnaire pending
Florina	Parlanis Mixalis	President	23	26/6, 3/7, 10/7	3/7	Questionnaire pending
Thesprotia	-	-	24	26/6, 3/7, 10/7		No response
TRAVEL AGENT ASSOCIATIONS						
Kastoria	Kastoriatours	President	25	3/7, 7/7, 10/7	26/6, 3/7	Questionnaire Pending
Ioannina	Touristikis Epiheiriseis Ioanninon M IKE	-	26	26/6, 3/7, 7/7, 10/7	26/6	No response
Preveza	Alfadakis Travel	President	27	26/6	26/6, 19/7	Questionnaire Answered
Florina	Gaiganis Travel	President	28	26/6, 3/7, 10/7	10/7	Questionnaire pending
Arta	HOULIARAS TOURS	President	29	26/6, 3/7, 7/7, 10/7, 18/7	26/6	Questionnaire pending
Thesprotia	Barkabas Travel	President	30	26/6, 3/7, 10/7, 19/7	3/7	Questionnaire pending
RESTAURANT ASSOCIATIONS						

Kastoria	Aggelos Georgiadis	President	31			Not active
Ioannina	Association of Pamvotis		32	26/6, 3/7, 10/7	26/6	Refused to answer
OTHER						
Department of Public Relations	Pinelopi Gkeka	Supervisor	33	26/6, 3/7, 7/7, 10/7	no	No Response
Association of Municipalities of Greek Thermal Springs	Markos Danas	President	34	26/6, 20/7	20/7	Participated in Focus Group
Representative of the Region of Epirus	Roza Ediaroglou	CEO Butterfly Communication	35	10/7		Refused to answer

12.5. Interview and Focus Group Questions

During the interview process, the questions addressed to the participants were directly related with the questionnaires as presented above. During the interviews, participants were given the opportunity to elaborate more freely under these questions by further discussing their views in a way that can not be captured through questionnaire forms. Focus group questions were also designed to spur discussion amongst participants and further explore issues that were flagged from the analysis of the results of the questionnaires and interviews. The questions of the focus group were:

1. What forms of alternative tourism do you believe your region could ideally offer?
2. Which of these forms could bring the greatest economic benefit to local communities?
3. Have past attempts been made to promote the tourism product of your region by combining different types of tourism?
4. Have efforts been made to promote the healing springs of your region in conjunction with other tourist products?

5. Could further development of the springs also bring environmental benefits?
How?
6. Which market do you believe the tourism product that includes healing springs and alternative tourism in your region is best suited for? (Age groups, nationalities, gender, etc.)
7. Regarding the management of the healing springs, who do you believe is the most appropriate entity for overseeing this? Municipalities? Individuals? PPP's? Please explain your reasoning.
8. How do you think the promotion of the healing springs could be improved?
9. What is the current state of the facilities of the healing springs? Are they under renovation? If yes, when are the projects expected to be completed and the facilities operational?
10. Our interviews indicated that there is not sufficient specialized personnel to work in the wellness sector in the ALTTOUR area. How do you propose this could change? How could the tourism season be extended so that specialized personnel can be employed for more than just a few months a year?
11. How do you believe the tourist demand and supply will be affected by the creation of a local Quality Pact among tourism businesses in the sector? What are the difficulties in implementing this?
12. Is there value in local quality agreements concerning the healing springs and tourism facilities (hotels, restaurants, museums, etc.) in the ALTTOUR area, combined with wellness packages?
13. Can better cooperation among local businesses be achieved through local quality agreements?
14. Can the commitment and participation of local organizations and businesses in joint actions for the promotion of alternative tourism be increased?
15. From all the matters discussed in today's conversation, which do you consider the most important and why?