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The competitiveness of the Greek Tourism Product in the European market

Ioannis SPILANIS, Assistant Professor, University of the Aegean
Aggeliki KARASOULI, Environmentalist, MSc in Tourism Policy, University of the Aegean
Eleni VAYANNI, Environmentalist, PhD in Tourism Policy, University of the Aegean

ABSTRACT

This paper questions the standing of Greece in the European market (UK, France and Germany) and investigates the way the price of tourist package is formed. Internet was the primary source of information and the results lead to the conclusion that the prices of the 3S products vary among the Mediterranean destinations. The AI products are popular and should be considered as cheap, in proportion to the benefits they provide. Instead, the SITPs even though they are expensive, consumers seem willing to pay more in order to fulfill their needs. Overall, Greece holds a middle position among the Mediterranean competitors.

Key Words: mass tourism, special tourist products, tourist packages, tour-operators, Mediterranean, Greece.

INTRODUCTION

Tourism demand modelling and forecasting have been critical issues in tourism planning process for several reasons. One of them is that the demand of tourism is one of the key factors that determine the destination's competitiveness which is a significant tool for planners and policy makers to formulate medium and long-term tourism strategies (Song and Guo, 2007). The effectiveness of a tourism policy in a destination is evaluated by monitoring the demand variables (arrivals, the tourist expenditure, the duration of staying etc.) which is a difficult and expensive process. An easier and rather cheaper approach could be the evaluation through the tourist packages provided by tour-operators (TOs) (Spilanis, Vayanni, Spyropoulos and Syrakis, 2006). The examined data do not refer to packages that were actually sold but only to holidays that are expected to be purchased by the consumers in the near future. They can give though some valuable clues regarding the position and competitiveness of a destination in the global tourist market. This means that, the packages that are supplied by TOs are based on previous years' actual data, due to the fact that the travel flow patterns do not present any distinct differentiations within a short period of time (Papatheodorou, 2003).

In this paper, the research focused on the composition and the prices of various products in different Mediterranean destination countries where the activity of TOs is very intensive. For example, of the 43.8 million Germans who took a holiday trip abroad in 2002, 22.1 million chose a Mediterranean destination and 50% of them chose a package tour. Greece, in particular witnessed an average of 349% growth per decade since 1950; a development that would not have been possible without the charter flights by the major tour operators (Koutoulas, 2006). The research investigates the factors that affect and differentiate both the prices of the tourist products supplied by the TOs and the composition of the products themselves, in order to ascertain the standing of Greece in the three major markets of UK, France and Germany.

THEORETICAL FRAMEWORK

The purpose of tourism planning is to maximize the profits from the tourist activity and at the same time to minimize any negative consequences that may follow the tourism development in the area (Coccosis, 2001). More specifically, after 1980, there has been an effort for sustainable development which requires the integration of economic, environmental and social components at all levels. Planners should be able to know

both the position in the market of the product (or products) offered by the destination and the factors that affect the prices of the supplied products which are examined below (Spilanis et al., 2006).

The travelling tourist motivation is an important factor regarding the demand of tourism. While most tourism products are related to relaxation, there is also a big variety of products that is addressed to tourists that seek in their holidays many kind of activities such as sports, cultural tours, observation of nature, adventurous experiences etc. The special interest tourism products (SITPs) were created to correspond to those needs and according to past research they are considered more sustainable, as long as they seem to have a greater performance in the destination (Vayanni, Spilanis and Karagounis, 2005).

The selection of the travelling destination by tourists is based on their needs, motives and expectations and also on the relation between the quality and price, or simply based on the low price of the product. The 3S (sea, sun, sand) tourists, have an option to select among various destinations, which constitute products that are close substitutes; therefore, price is the determinant in the final choice. In other words, the lower-quality, (3S, relaxation) mass tourism will be directed to destinations that ensure low cost and by extension high competitiveness. For example, towards such destinations as described above (like Turkey, Morocco or Tunisia), Greece has only few comparative advantages regarding this simplified tourism product that demands only accommodation, board, sea and sun. On the other hand, among the SITPs the competition is not so strong, as tourists chose the destination that meets their needs and is more related with the unique characteristics of the destination.

The degree to which the destination depends on the TOs, the type of contracts between the TOs and the travel service suppliers and the type of supplies provided to the customers are very important factors that affect the performance of the tourism activity (Spilanis et al., 2006). Moreover, tourists who choose packages with only breakfast (BB) or half board (HB) included in the price need to spend more money inside or outside of the hotel. On the other hand, even though the packages including all inclusive (AI) services tend to be more attractive to the tourists, they may have negative consequences to the local economy (Ciftci, Duzakin and Onal, 2007) for the reason that the local businesses will see the demand for their products to be decreased.

Regarding SITPs, tourists usually prefer their travel to be organised and conducted with minimum use of services of the organised tourism (Venetsanopoulou, 2006). However, apart from the relaxation tourism products, also the special ones may be supplied by a special, rather small tourism agent. It is worth mentioning that, the continuous production of specialised products nowadays, is a result not only of the differentiated needs but also of the fact that the conventional 3S tourist product seem to be in the phase of decline (Spilanis and Vayanni, 2004).

This research of the tourism packages provided by the TOs, should be able to reveal the most important factors that differentiate the prices of the tourism packages and clarify some issues like: are special motives an important factor that makes tourist select a tourism product? Are tourists willing to pay for an expensive product in order to fulfill their needs? How much does the distance between the origin and destination country, the supplies provided, the type and the class of the accommodation and the season that the travel takes place, affect the daily and total price of the package ?

METHODS AND DATA

This research investigates the standing of Greece and several of its destinations, in the European market and especially on those of UK, France and Germany and compares the special interest products to the 3S ones. The primary source of information was the internet and all data was gathered from September 2009 through March 2010 and focused on tourism packages for the year 2010 in the competitive Mediterranean countries due to their similar characteristics. The factors that were considered for each tourist package were: the tourist agent or tour-operator that supplies the package, the origin country, the destination country and the particular locations, the tourist product that is highlighted in each trip, the period of travel, the number of overnight stays that are included in the package, the type of accommodation and class, the supplies that are offered in the package, the price of the package and the distance between the origin and the destination country.

All of the data were imported into a database, and after removing the outliers, the means of each category were compared using SPSS 13.0. First of all, 3S products were compared among different destinations and then special interest products were compared with the 3S ones and among them. Moreover, the most

popular packages were compared among Greek destinations. As a whole there were a total of 33205 tourist packages were searched from 72 different TOs. 31387 (94, 5%) of them concern 3S packages and the rest the special interest products. The special products that were included in the research were: 171 (0,5%) packages of adventure tourism (trekking, scuba diving etc), 237 (0,7%) packages of marine tourism (cruise, yachting etc), 353 (1,1%) packages of arts & culture tourism, 331 (1,0%) packages of walking/ hiking tourism, 513 (1,5%) packages of sports & wellness tourism (both participants & spectators) and 213 (0,6%) packages of nature tourism (flora & fauna observation).

RESEARCH FINDINGS

Regarding the 3S tourism packages, this essay is concentrated throughout the months April and October as the relaxation-3S tourism takes places in sunny countries, mainly in this period. At this point, a brief comparison between some of the most popular packages among Mediterranean countries are presented as an effort of detection of the Greek relaxation product's competitiveness (3S-mass tourism product). Moreover it should be mentioned that all rates in this essay (both in text and tables) is a result of the procession of at least 25-30 observations, in order to be statistically reliable.

In 7 days packages, including low class accommodation (2* hotels), Greece seems to be the most expensive destination for the English (77.8€/day), while the average cost for the same packages for Turkey, Spain and Malta cost 66.4€/day. On the other hand, the Greek package including 14 days is more attractive, as it costs 44.7€/day, less than the Cyprian (58.4) and the Spanish one (46.8€/day), but still more than the equivalent Turkish (39.1€/day). In medium class hotels (3*), Greece, Cyprus and Italy are the most expensive destinations among the other Mediterranean countries regardless of the providing supplies. When BB or HB is included in package, Malta and Turkey seem to be the cheapest countries while Tunisia is the most competitive one in AI packages along with Turkey. A typical tourist product for English tourists is the one including 7 days in 4* hotels with HB or AI supplies from June to August. When HB is included in the package, Greek package cost 965,7€ (138.0 €/day) while the Turkish cost 739.4€ (105.6€/day) and the Tunisian one 729.3€ (104.2€/day) while when AI is added, Greek package costs 1026.4€ (146.6€/day), the Maltese package 875.9€ (125.1€/day) and the Moroccan one 897.7€ (128.3€/day). The one week HB package, costs in Greek 5* hotels for the English 1141.6 € (163.1€/day) and the AI 1241.5 € (177.4 €/day). The same packages in Turkish hotels cost 1209.7 € (125.3€/day) and 1089.3€ (155.6€/day) and their equivalent for Spanish hotels, 968.2€ (138.3€/day) and 1059.3€ (151.3€/day), respectively. Finally, comparing packages with different supplies in apartments and studios for English customers one can assume shortly: the price for the Greek 7 days package in 3* an apartment, with self catering (SC), is 589.5 € (84.2€/day), same with the average and more than the competitive destinations of Spain (529.7€ - 75.7€/day) and Turkey (505.2€ - 72.2€/day). Among the packages which include accommodation in higher category settlements (4*), the 7 days Greek packages are considered rather expensive as along with the Cyprian ones that are the most expensive in English market for SC supplies. On the contrary, the equivalent 14 days Greek packages seem to be the cheapest available to English!

At this point, it is worthwhile mentioning some results from the similar comparisons, in French and German market. The 4* hotels seem to be the usual accommodation for a 7 days package for the French tourists. When BB is included in the package, Tunisia is the cheapest destination (646.2€ - 92.3€/day) and Portugal the most expensive (777.5€ - 111.1€/day). However, the most popular 3S product is the one with HB supplies which cost on average 802.8€ (114.7€/day) for all destinations, while the Greek package cost 791.9€ (113.10€/day), the Turkish package 661.2€ (94.5€/day) and the Spanish one 702.4€ (100.3€/day). The one week AI package cost in Greek 3* hotels 846.4€ (120.9€/day) in high season (June-August) while in Tunisian and Turkish hotels 766.8€ (109.5€/day) and 808.0€ (115.4€/day), respectively. The Greek packages that include AI accommodation in 4* hotel cost 952.2€ (136.0€/day) in high season and compared to Spanish (870.1€ - 124.3€/day) and Turkish (873.5€ - 124.8€/day) are considered to be expensive. Germans prefer high class accommodation (4-5*) with different supplies. The one week BB package in Greek 5* hotels, cost for the Germans 858, 5€ (122.6€/day) and appears to be the second cheaper destination after Malta (820.4€ - 117.2€/day). When AI is added, Greek packages cost 914.9€ (130.7€/day), Spanish packages 1105.3€ (157.9€/day) and Moroccan packages 903.6€ (129.1€/day).

The prices of the Greek packages that are provided to English, are usually same or higher than the average and the biggest difference is detected in 5* hotels with HB supplies. In French packages, Greece seems to be a much more expensive destination regarding BB packages where differences vary from 15€/day in 4*

hotels to 92€/day in 5* hotels! The rest packages are generally equal to the Mediterranean average. Finally, expecting BB packages in 3* hotels, Greece is 1 to 5€/day cheaper than the average price.

The next stage was to examine the factors that contribute to the price of the relaxation package. This was achieved by using Pearson correlation as the tool to describe the correlation between the daily prices of the packages with other variables (the class of the accommodation, the provided supplies, the distance between the origin and destination country and the specific period in which the travel will take place) and also, by comparing some average total and daily prices of packages with different formation. The results presented below, refer to packages available to UK customers only, due to the larger variety of offered products.

The daily prices of packages regarding 7 days accommodation in hotels, is positively correlated with the seasonality ($R=0.239$, $p=0.000$) and the provided supplies ($R=0.175$, $p=0.000$). The correlation is even higher with the accommodation class ($R=0.532$, $p=0.000$). The daily price of the package has the strongest positive correlation with the accommodation class in two-week packages too ($R=0.603$, $p=0.000$), followed by its correlation with the supplies ($R=0.211$, $p=0.000$) and the season of the travel ($R=0.182$, $p=0.000$). Between the daily price and the distance there seems to be a small negative correlation ($R=-0.127$, $p=0.000$) which can be explained due to the fact that some of the cheapest destinations of the Mediterranean sea (Turkey, Morocco, Tunisia etc) are located far away from UK. The results concerning both studios and apartments, appear to be somewhat differentiated. The daily price, for both one and two weeks packages, has a positive correlation with the season ($R=0.329$, $p=0.000$ – $R=0.259$, $p=0.000$ respectively). However, that correlation with the accommodation class ($R=0.277$, $p=0.000$ - $R=0.369$, $p=0.000$ respectively) is not as strong as it was at the packages including accommodation in hotels. On the contrary, the daily price seems to be more affected by the supplies ($R=0.461$, $p=0.000$ – $R=0.597$, $p=0.000$). Finally, the daily price does not seem to be correlated with the distance between the origin and destination country in one-week packages ($R=0.094$, $p=0.000$) while the same correlation is negative in two-week packages ($R=-0.238$, $p=0.000$) for the reasons mentioned above.

The total price of the package seems to increase when the duration of the travel increases itself, and moreover this increase is bigger in higher accommodation class. But, while the total price of the package increases on longer duration travels, this increase does not seem to be proportional to the travel length. This means that the accommodation cost does not seem to have major influence on the package price, at least in lower class hotels. When higher class hotels are included in the package, that influence seems to grow. For example, the one-week package in 2* hotel costs 533.3€ while the equivalent two-week package costs only 136.3€ more. Therefore, the expenses for accommodation correspond to 25.55% of the total price of the package. In 3* hotels this rate is 34.18%, in 4* hotels 42.37% and in 5* hotels 51%. On the contrary, in packages with accommodation in apartments and studios this rate remains stable in all categories, at 32-42%. On the other hand, the daily price of the package decreases in longer duration packages. For example, if supplies are excluded, the one-week package in a 4* hotel cost 118.2€/day while the same two-week package cost 84.8€/day. Similarly, a one-week package in a 3* studio costs 82.3€/day and the equivalent two-week 51.8€/day.

All these packages concern relaxation tourism that takes place during the summer; however there is a small differentiation of price depending on the month. More specifically, the prices increase in summer months (June, July and August) compared with the autumn and spring months and that increase seems to be related with the accommodation class. The variation of the package's daily price if low and middle class accommodation is included (2* or 3*) is relatively small by contrast with packages with higher class accommodation. For example, without taking into consideration the supplies provided, the one-week package in a 3* hotel costs in peak-out months 611.8€ (87.4€/day) and in high season 725€ (103.6€/day). On the other hand, the one-week package in a 5* hotel, costs in low season 956.3€/day (136.6€/day) and in high season 1119.2€ (159.9€/day).

Then packages with different supplies are compared. The total price of the package increases if more supplies are added in the package. The only exception is that the full board (FB) packages sometimes are much more expensive and their price is even more than the equivalent AI ones. However, if packages including accommodation in hotels are examined, it seems that the increase of the total price is bigger if a higher class hotel is chosen with the same supplies. For example, the one-week BB package in a 3* hotel costs 614.4€ (87.8€/day), the same package in a 4* hotel costs 776.2€ (110.9€/day) while the one-week AI package in a 3* hotel costs 719.5€ (102.8€/day). On the contrary, this does not seem to apply to packages including apartments or studios as well. For example, the two-week BB package in a 3* studio costs 767.8€ (54.8€/day),

the same package in a 4* studio costs 929.2€ (66.4€/day) while the two-week AI package in a 3* studio costs 1110.3€ (79.3€/day).

On the other hand, a key factor that forms the final price of the package is the specific destination in each country. According to this research, if relaxation packages to Greece including accommodation in hotels are examined, Corfu is the cheapest destination, followed by Rhodes and Zante, while Santorini is the most expensive destination followed by Skiathos and Malia. For the rented studios and apartments, the cheapest destinations are Malia and Corfu while the most expensive are Kefalonia and Santorini. Generally, the cheapest packages involve staying in studios, then in apartments and finally in hotels. More specifically, for some very common packages for English customers, one may observe that: for the SC package in 3* studios or apartments, the cheapest destination is Malia (73.2€/day). Followed by Corfu (75.8€/day), Halkidiki (76.6€/day), Lesvos and Zante (77.4€/day), Kefalonia (81.2€/day), Rhodos (81.8€/day), Rethymno (84.2€/day), Hersonissos (84.3€/day), Skiathos (85.9€/day) and Santorini (87.6€/day). For the two-week BB package in 3* hotels, the cheapest destinations are Kos (45.3€/day) and Zante (67.9€/day) and the most expensive are Santorini (67.9€/day) and Parga (57.9€/day). A typical 3S tourist product for the English in Greece is the one that lasts 7 days, with AI in 4* hotel. The cheapest destination for this package is Hersonissos (117.9€/day), and then follows Corfu and Rhodes (119.8€/day), Kos (132.9€/day), Zante (134.4€/day) and Rethymno (136.9€/day). Finally, for the HB package in 5* hotel, the cheapest destination seems to be Rethymno (118.0€/day) and Kos (130.5€/day), followed by Ag. Nikolaos (132.8€/day), Corfu (141.3€/day), Rhodes (144.6€/day) and the most expensive destinations are Kefalonia (163.7€/day) and Halkidiki (170.2€/day).

There is a significant difference in the prices comparing these packages with the equivalents of special interest products. Usually the special interest tourism products last 7 to 15 days include mostly HB or FB services and take place all the year. Moreover, most packages include accommodation in lower class hotels (apart from the cultural ones), family-run hotels, guesthouse, inns etc.

In the following table (Table 1), various special interest tourism products that are supplied around the Mediterranean Sea and are addressed to English, French and German market are compared with the corresponding relaxation tourism product (HB or FB included). The prices of cultural and nature tourism packages are very high and are followed by marine tourism, adventure tourism, walking & hiking tourism and sports tourism packages.

Examining some popular SITP packages for each country, including HB or FB supplies and accommodation in hotels and apartments comparing them with their equivalent relaxation packages, one could observe that: an one-week sports & wellness tourism package to Turkey costs 152.8€/day (58.8 €/day more than the corresponding relaxation package), a one-week arts & culture tourism package to Italy costs 223.8€/day (89.7€/day more than the relaxation one), a one-week hiking & walking package to Croatia, France, Malta or Cyprus costs 154.4€/day (34.9€/day more than the relaxation one), a one-week nature package Portugal or Spain costs 219.3€/day (107.5€/day more than a relaxation one) and the one-week marine tourism package (cruise) to south Mediterranean countries (Morocco, Egypt or Tunisia) costs 172.9€/day (62.5€/day more than the equivalent relaxation package). Finally, the one-week FB or HB sports & wellness package to Greece in hotels or apartments, costs 153.3€/day, the same hiking & walking package costs 152.8€/day, the two-week hiking & walking package cost 112.7€/day while their equivalent relaxation tourism packages cost 121.9€/day and 90.3€/day respectively.

Table 1

	ADVENTURE		MARINE		ARTS & CULTURE		HIKING & WALKING		SPORTS & WELLNESS		NATURE		RELAX		
	TOTAL PRICE (€)	PRICE/DAY	TOTAL PRICE (€)	PRICE/DAY	TOTAL PRICE (€)	PRICE/DAY	TOTAL PRICE (€)	PRICE/DAY	TOTAL PRICE (€)	PRICE/DAY	TOTAL PRICE (€)	PRICE/DAY	TOTAL PRICE (€)	PRICE/DAY	
up to 7 nights	N	98	98	135	135	206	206	172	172	308	308	123	123	6933	6933
	Mean	1175,8	167,5	1333,9	192,5	1305,9	209,2	1080,3	155,4	970,0	141,3	1377,4	212,6	825,2	117,9
	Median	1154,2	163,6	1214,8	175,7	1179,0	178,5	1094,7	156,4	926,1	135,0	1358,0	207,4	780,2	111,5
	Min	585,0	83,6	733,0	104,7	521,6	90,0	714,8	102,1	500,0	71,4	676,1	129,7	225,0	32,1
	Max	1828,4	261,2	2943,2	490,5	3522,7	759,9	1854,5	264,9	2210,0	552,5	2039,8	349,4	3047,6	435,4

8 to 15 nights	N	68	68	98	98	100	100	138	138	82	82	68	68	3991	3991
	Mean	1674,7	139,9	1874,4	152,7	1975,6	181,4	1598,7	126,4	1547,4	117,4	1824,4	176,4	1245,0	88,9
	Median	1723,0	134,5	1828,4	137,5	1680,0	156,4	1535,0	115,8	1526,5	110,6	1690,0	169,9	1158,8	82,8
	Min	995,0	71,1	964,8	98,5	885,2	70,0	1120,0	80,0	896,6	64,0	970,0	112,9	437,1	31,2
	Max	2214,8	249,4	3965,9	360,5	4090,9	416,7	2215,0	244,4	2385,2	246,2	3748,9	321,3	2996,3	214,0

Comparison of HB & FB, special interest tourism packages with the 3S ones in the Mediterranean countries

CONCLUSIONS

The results of this research show that the prices of the 3S tourist products are very low. The type of the accommodation and its class is an important factor that differentiates the package prices while the prices do not seem to rise significantly if more supplies are added. The prices of the AI packages are considered low, given the fact that one does not have to spend any more money during their stay at the destination. Also, the duration of the travel is another factor that affects the price/day which decreases when the days of staying are increasing. Moreover, within the same country, the price of the packages seems to change in each specific location.

Generally, one could assume that, Greece holds a middle position in the Mediterranean area. The cheapest destinations for the English tourists, for all types of accommodations, supplied services or travel duration, are Turkey, Malta, Tunisia and Egypt, while the most expensive are Greece, Cyprus, Italy and Croatia. Tunisia, Turkey and Morocco are the most competitive destinations for the French tourists, while according to this research, Cyprus, Greece and Portugal are considered expensive in the French market. Finally, Tunisia and Malta seem to be the cheapest destinations for the Germans, while Portugal and Cyprus are the most expensive. Generally, one could assume that, Greece is considered rather expensive and not competitive for the relaxation tourism product. Consequently, Greece will continue to lose customers each year if the supplied product is the same.

The analysis also suggests that the special interest tourism products cost more than those of the relaxation tourism. Especially a cultural or nature tourism package costs most times up to 60% more than a same duration 3S package with similar supplies. This is because the SITs include many activities that tourists are willing to pay for in order to fulfil their needs as this essay proves. Therefore, the profit per unit of the product in the special interest products is much higher than the 3S ones.

In this research, many statistical tests and comparisons of the mean price of various packages took place, given that a large amount of data has been analyzed, we can conclude that there is indeed significance with respect to the findings. Thus, this process has provided many clues of how the price of a tourist package is formed. However, further research would be essential to determine any additional factors that cause price fluctuations amongst each of the researched packages.

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