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SCHOOL OF MANAGEMENT & ECONOMICS SCIENCE

DEPARTMENT OF MANAGEMENT SCIENCE AND TECHNOLOGY

Sustainable Tourism Development
by promoting local quality agricultural products
The case of Western Crete

PhD Thesis

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Η περίπτωση της Δυτικής Κρήτης

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<u>Υπεύθυνη Δήλωση:</u> *Βεβαιώνω ότι είμαι συγγραφέας αυτής της διδακτορικής διατριβής και ότι κάθε βοήθεια την οποία είχα για την προετοιμασία της, είναι πλήρως αναγνωρισμένη και αναφέρεται στη διδακτορική διατριβή. Επίσης έχω αναφέρει τις όποιες πηγές από τις οποίες έκανα χρήση δεδομένων, ιδεών, ή λέξεων, είτε αυτές αναφέρονται ακριβώς είτε παραφρασμένες. Επίσης βεβαιώνω ότι αυτή η διαδακτορική διατριβή προετοιμάστηκε από εμένα προσωπικά ειδικά για τις απαιτήσεις του Διδακτορικού Προγράμματος Σπουδών του Τμήματος Διοικητικής Επιστήμης και Τεχνολογίας του ΕΛΜΕΠΑ.*

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To my sons

ΠΕΡΙΛΗΨΗ

Ο διατροφικός τουρισμός, ο οποίος αναπτύσσεται παγκοσμίως τα τελευταία χρόνια θεωρείται τουρισμός ειδικού ενδιαφέροντος, προσελκύοντας επισκέπτες που επιθυμούν να καταναλώσουν αυθεντικά τοπικά ποιοτικά αγροτικά προϊόντα. Οι τουρίστες δαπανούν ένα σημαντικό ποσοστό του προϋπολογισμού τους για την αγορά τοπικών αγροτικών προϊόντων και συναφών δραστηριότητων κατά τη διάρκεια των διακοπών τους στον τελικό τους προορισμό. Λόγω του γεγονότος ότι ο τουριστικός τομέας στην Ελλάδα και κυρίως στην Κρήτη έχει αυξηθεί σημαντικά τα τελευταία χρόνια σε σύγκριση με τον αγροτικό τομέα, μετά από ανάλυση των κύριων μεγεθών σε βάθος χρόνου, η παρούσα διδακτορική διατριβή επικεντρώνεται στην αειφορική τουριστική ανάπτυξη στην Κρήτη, μέσω της προώθησης τοπικών ποιοτικών αγροτικών προϊόντων υπό το πρίσμα μιας ολιστικής προσέγγισης.

Οι τρέχουσες τάσεις στον διατροφικό τουρισμό προκύπτουν, έπειτα από εκτενή βιβλιομετρική ανάλυση, με τον προσδιορισμό διάφορων προσεγγίσεων στον διατροφικό τουρισμό και δημιουργώντας ένα εννοιολογικό πλαίσιο διαχείρισης του διατροφικού τουρισμού λαμβάνοντας υπόψη την πλευρά τόσο των τουριστών όσο και των τοπικών φορέων. Επιπλέον, η διδακτορική διατριβή επικεντρώνεται στα αποτελέσματα της συμπεριφοράς του τουρίστα, τα οποία αναφέρονται στις προθέσεις του να αγοράσει/καταναλώσει, να προτείνει και να επισκεφτεί ξανά, ανάλογα με το αν πρόκειται για τοπικό αγροτικό προϊόν ή χώρο εστίασης/προορισμό. Λαμβάνονται υπόψη οι διασυνδέσεις των κύριων παραγόντων όπως τα κίνητρα, η γνώση, ο πολιτισμός, η ιστορία, η αυθεντικότητα, οι εμπειρίες, οι αξίες, οι πεποιθήσεις, τα συναισθήματα, οι επιθυμίες, οι αντιλήψεις, η ικανοποίηση και η συμμετοχή σε συναφή δραστηριότητες.

Το προφίλ των αλλοδαπών τουριστών που επισκέπτονται τη Δυτική Κρήτη προσδιορίζεται κατά τη διάρκεια και μετά την περίοδο του κορονοϊού. Χρησιμοποιείται ένα Δομικό Μοντέλο Εξισώσεων και ένα εκτεταμένο Μοντέλο Θεωρίας Σχεδιασμένης Συμπεριφοράς, βασισμένο στην επιρροή κοινωνικών προτύπων, στις στάσεις απέναντι στη συμπεριφορά, στο αντιληπτό έλεγχο της συμπεριφοράς και την ικανοποίηση, για την καλύτερη κατανόηση των προθέσεων των τουριστών να επισκεφθούν ξανά και να προτείνουν την Περιφέρεια της Κρήτης, των προθέσεων τους να βρουν τοπικά αγροτικά προϊόντα στις χώρες τους και της προθυμίας τους να πληρώσουν περισσότερο για τέτοια προϊόντα. Η αντιληπτή ποιότητα και

η αντιληπτή αξία επηρεάζουν θετικά την ικανοποίηση των τουριστών, η οποία, με τη σειρά της, προκαλεί ευνοϊκές προθέσεις για να επισκεφθούν ξανά και να προτείνουν την Κρήτη ως τουριστικό προορισμό. Η ικανοποίηση, η στάση και η επιρροή κοινωνικών προτύπων φαίνεται να είναι οι πιο σημαντικοί παράγοντες που επηρεάζουν θετικά τις προθέσεις του αλλοδαπού τουρίστα, από την άλλη πλευρά, η επίδραση του αντιληπτού ελέγχου συμπεριφοράς στις προθέσεις του αλλοδαπού είναι αμφιλεγόμενη.

Επιπλέον, επισημαίνεται η σημασία των αξιών κατανάλωσης τοπικών τροφίμων και τα οφέλη, όπως επίσης και η σημασία της συμμετοχής τους σε συναφείς δραστηριότητες και της κατανάλωσης νέων προϊόντων. Επίσης, προσδιορίζεται ο διαμεσολαβητικός ρόλος της εικόνας του γαστρονομικού προορισμού μεταξύ των στάσεων των τουριστών απέναντι στα τοπικά αγροτικά προϊόντα, της ικανοποίησης και των προθέσεων τους. Όλες οι σχέσεις μεταξύ των μεταβλητών του μοντέλου βρέθηκαν στατιστικά σημαντικές, επηρεάζοντας άμεσα ή έμμεσα τις προθέσεις των τουριστών. Οι αλλοδαποί τουρίστες ενδιαφέρονται πραγματικά για τις αξίες κατανάλωσης και κυρίως για την ποιότητα και τη γεύση όταν δοκιμάζουν τοπικά αγροτικά προϊόντα και όχι τόσο για αξίες που έχουν να κάνουν με επιδεικτικούς σκοπούς. Επιπλέον, υπάρχει ανάγκη για αναπροσανατολισμό της στρατηγικής μάρκετινγκ και διανομής, εμπλέκοντας περισσότερους τουρίστες σε διατροφικές δραστηριότητες, προκειμένου να αυξηθεί η ικανοποίησή τους.

Τέλος, αφού αναλύθηκαν τα δυνατά σημεία, οι αδυναμίες, οι ευκαιρίες και οι απειλές του αγροτικού τομέα από την πλευρά των περιφερειακών φορέων, χρησιμοποιώντας τον πίνακα Eisenhower, διαπιστώθηκε ότι η δημιουργία ενός τοπικού δικτύου με τη συμμετοχή βασικών φορέων από διαφορετικούς τομείς της οικονομίας ή η ενδυνάμωση των υπαρχούσων δικτύων με τον ικανό συντονισμό είναι ύψιστης σημασίας για την αποτελεσματική προώθηση των τοπικών αγροτικών προϊόντων και της ανάδειξης της Περιφέρειας Κρήτης ως γαστρονομικό προορισμό.

Λέξεις κλειδιά: Διατροφικός τουρισμός, Αειφόρα ανάπτυξη, Διοίκηση, Μάρκετινγκ

ABSTRACT

Food tourism, which has been growing globally in recent years is considered as special interest tourism, attracting visitors who are looking to consume authentic local quality agricultural products. Tourists spend a significant percentage of their budget on the purchase of local food products and related food activities, during their holidays at the final destination. Due to the fact that the touristic sector in Greece, and mainly in Crete, has significantly grown in the last years in comparison with the agricultural sector, after analyzing the main figures over time, this thesis has focused on the development of sustainable tourism in Crete by promoting local quality agricultural products under a holistic perspective.

Current trends on food tourism are derived, after an extensive bibliometric analysis, by identifying food tourism approaches, and generating a conceptual framework of food tourism management by taking into account both tourists' and stakeholders' perspectives. Moreover, the thesis is focused on the tourist's behavioral outcomes, which are their intentions to purchase/consume, to recommend and to revisit, depending on whether a local food product or a food service industry/destination is concerned. The interlinkages of the main factors, such as motivations, knowledge, culture, history, authenticity, experiences, values, beliefs, emotions, desires, perceptions, satisfaction and involvement, are taken into consideration.

The profile of international tourists who visit Western Crete is identified during and after the coronavirus period. The Structural Equation Model and an extended Theory of Planned Behavior Model, based on subjective norms, attitudes, perceived behavioral control and satisfaction, are used to better understand the tourists' intentions to revisit and recommend the Region of Crete, intentions to find local food products in their countries and the willingness to pay more for such food products. The perceived quality and perceived value of local foods positively influence satisfaction, which, in turn, evoke favorable intentions to revisit and recommend Crete as a touristic destination. Satisfaction, attitude, and subjective norms seem to be the most significant drivers affecting positive behavioral intentions; on the other hand the influence of perceived behavior control on intentions is controversial.

Furthermore, the importance of the tourists' local food consumption values and perceived benefits are highlighted, as well as their food involvement and food neophilia, while the

mediating role of the food destination image between tourists' attitudes towards local food, satisfaction and behavioral intentions is pinpointed. All the relationships among the drivers of the model were found to be statistically significant, directly or indirectly affecting behavioral intentions. Tourists really do care about consumption values, mainly sensory quality, when tasting local foods, and not so much with prestige values. Moreover, there is a need for the reorientation of the marketing and distribution strategy, involving more tourists in food activities in order to increase their satisfaction.

Finally, after analyzing the strengths, weaknesses, opportunities and threats of the agricultural sector from the perspective of regional stakeholders, using the Eisenhower matrix, it was found that the creation of local network of key stakeholders from different sectors or the reinforcement of the existing ones with an efficient coordination is of utmost importance for the effective promotion of the local food products and the image of the Region of Crete as a food tourism destination.

Keywords: Food Tourism, Sustainable Development, Management, Marketing

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LIST OF ABBREVIATIONS

AirBnB AirBed & Breakfast

CIHEAM-MAICh Ciheam-Mediterranean Agronomic Institute of Chania

GDP Gross Domestic Product

IGCAT International Institute of Gastronomy, Culture, Arts & Tourism

PDO Protected Designation of Origin

PGI Protected Geographical Indication

RMSEA Root Mean Square Error of Approximation

SEM Structural Equation Model

SME Small, Medium Enteprise

SWOT Strenghts, Weaknesses. Opportunities, Threats

TPB Theory of Planned Behavior

TSG Traditional Speciality Guaranteed

UN United Nations

UNESCO United Nations Educational, Scientific and Cultural Organization

INTRODUCTION

Tourism is one of the most important sectors of the world economy, due to the spectacular dynamics it has displayed in the last fifty years. However, it is observed both at the international as well as at the national and regional level that most tourists are directed towards mass tourism in specific peak periods, thus making an unbalanced development in the wider area with all the negative consequences (economic, social, environmental) that this specific type of tourism entails (Smith and Eadington, 1992). To counter this phenomenon, alternative forms of tourism began to develop in the 70s in order to counter mass tourism. These forms of tourism prioritized the development of the rural areas, the stimulation of agricultural production, the promotion of local agricultural products, the protection and preservation of the natural environment, the preservation of cultural heritage, strengthening entrepreneurship in small-scale projects, improving the quality of life and living income of the rural population while requiring their high participation in decision-making, as well as the active participation and information of tourists in various activities to enrich knowledge and experiences (Brookfield, 1988; Butler, 1990; Wall, 1997).

In Greece, tourism is the most developed industry in Greece. According to the most recent available data from INSETE (2026) in 2025, tourism participates directly in the formation of the gross domestic product (GDP) by 13% (€32,4 billion) and the indirect contribution of tourism corresponds up to 34,6% (€85,9 billion) of GDP in 2025. Regarding the direct contribution of the sector in 2025, it is distributed across the figures from inbound tourism expenditure (€23,6 billion, including cruise passenger expenditure), air transport (€3,1 billion), sea transport (€147 million), cruise company expenditure (€673 million), domestic tourism (€2,5 billion), and domestic added value from investments (€2,4 billion).

The direct participation of hospitality and catering branches in total employment is calculated at 17% of the total employment; taking into account the multiplier effects, the total employment (direct and indirect) created by tourism at its peak amounts to 37,5% to 45,2% of the total employment in all sectors, decreasing at the same time the unemployment rate below 10%. The foreign arrivals of tourists in 2025 not including cruise ship passengers reached 38 million; if cruise ships are included, the total arrivals of foreign tourists reached 43,3 million which was the year with the highest arrivals record in Greek tourism. The

Region of Crete contributed 19,2% of the total revenues from incoming tourism in Greece 2025, and touristic expenses contributed to 48,8% of the regional GDP (INSETE, 2026), while in 2025 international air arrivals of visitors through direct flights reached 5,6 million, a record number for the Region (Civil Aviation Authority; Fraport Greece, 2026).

From 2020 onwards, with the advent of the coronavirus, all indicators and sectors of the economy were negatively affected. Tourism was also negatively influenced at the national and regional level. But from the year 2022 onwards, the economy started to stabilize and some figures also increased, especially in the touristic sector compared to 2019, the year before coronavirus. On the contrary, the agricultural sector seems to have decreasing trends over time, from 2011 and onwards, since total cultivated agricultural land (in stremmas) decreased especially at the national level, whereas the Region of Crete seems to have recovered from the pandemic crisis.

Since on the one hand, tourism is the most developed sector in Greece and especially in Crete and on the other hand there is an imperative need of supporting the less developed but extremely vital agricultural sector through the high quality of local agricultural products, this thesis will focus on possibilities and perspectives of tourism in Crete towards a sustainable development through the promotion of local agricultural products. For this reason, based on the most recent available data, the current situation as well as the evolution of the touristic and agricultural sector over time will be recorded and analyzed at the prefectural (Regional Units of Crete), regional (Region of Crete) and national (Greece) level with lots of comparisons among them; emphasis will be placed on food tourism, an alternative form of tourism that supports sustainable tourist development in the Region of Crete through a holistic approach, by analyzing the results of the surveys that were conducted on tourists and on regional stakeholders, taking into account both demand and supply side.

In Chapter 1, general economic data are analyzed at the national, regional and local level over time, such as the GDP, GDP per capita, contribution of the primary, secondary and tertiary sectors to GDP, employment per sector, type, sex, age, unemployment rate, contribution of tourism on GDP, distribution of employment per touristic branch, per type and touristic branch, per gender and touristic branch, and per age and touristic branch, and tourist offices.

In Chapter 2, tourism data concerning touristic accommodations are analyzed at the national, regional and local level over time, such as hotel accommodations (units, rooms, beds), by order of magnitude and size, by star category, camping sites, rooms-apartments for rent, furnished tourist residences, villas and AirBnB accommodations.

In Chapter 3, tourism data at the national, regional and local level are analyzed over time concerning touristic arrivals per cruises, domestic ships, domestic and international flights, total revenues, total overnights of foreign visits, total expenditure per visit and per overnight, total average duration of stay, arrivals of domestic and international visitors at hotel accommodations, overnights of domestic and international visitors at hotel accommodations and occupancy at hotel accommodations.

In the Chapter 4, agricultural data at the national, regional and local level are analyzed over time concerning total cultivated agricultural land, crops on arable land, garden area, tree groves and vines as well as the main production of each cultivation. Moreover, quality schemes for agricultural products and foodstuffs are described such as European labels of Protected Designation of Origin, Protected Geographical Indication & Traditional Speciality Guaranteed as well as Cretan labels such as Crete-Land of values, Cretan cuisine, Cretan taste, the Cretan grocery and open wineries. Concerning the two most popular agricultural products of Crete, wine and olive oil, the varieties of wines and the monumental ancient olive trees are also described.

In the Chapter 5, food tourism is analysed based on an extensive literature review by conducting a bibliometric analysis for the period 2014-2025 concerning the number of articles on local agricultural products and food tourism published by scientific international journals, the number of papers per Academic Institute and per author, the main countries with the greatest number of article publications, main countries of research, type of research, articles by demand and supply, categorisation of local agricultural products, food service providers and food sustainability.

Food Tourism Approaches have been developed as well describing food tourism as an attraction, a desire to learn, linkages with culture, history, authenticity, tourists' motivations and experiences. A conceptual framework of food tourism management is also developed under a holistic approach taking into account the demand and supply perspectives, such as

tourists' approach, local food attributes/brand and intentions to consume/buy/recommend, food service characteristics/image and intentions to revisit/recommend, gastronomic characteristics/image of a destination and intentions to revisit/recommend, stakeholders' approach, network and marketing, as well as broad categories of food tourism, in order to better understand the decision making system concerning behavioral outcomes.

In Chapter 6, the results of the tourism survey that was conducted in 2021 (during the pandemic period) based on foreign tourists' views are presented. Sociodemographic characteristics of foreign tourists are described, such as nationality, age, employment, income, previous visits, travelling company, arrangement of touristic packages, type of airlines used, type of accommodation, hotel star rating, duration of stay, and budget spent in order to pinpoint the profile of tourists who visit Western Crete.

Moreover, tourists' opinion about local agricultural products such as the degree of importance of food experiences to choose Crete as a final destination, which agricultural products they buy, their participation in food activities, the availability of local agricultural products in their accommodations, type of food package chosen at hotel accommodations, places where they consumed those products, satisfaction of food services, and the degree of meeting the expectations and the desire to find those products in their countries are also described. The Theory of Planned Behavior based on attitudes, subjective norms, and perceived behavior control is developed in an extended format using the Structural Equation Model in order to describe the behavioral intentions of tourists, taking into account the mediating role of satisfaction between perceived value & quality and behavioral intentions to revisit and recommend Crete as a touristic destination.

In Chapter 7, the results of another tourism survey that was conducted in 2023 (after the pandemic period) based on foreign tourists' views are presented. Sociodemographic characteristics of foreign tourists and tourists' opinion about local agricultural products are described as well and compared to the previous research. An augmented Theory of Planned Behavior is used to examine the effect of local food consumption values on attitude, the effect of perceived benefits on satisfaction, and the effect of attitude and satisfaction on the destination image, which in turn affect tourists' behavioral intentions. Moreover, the direct influence of attitude, perceived behavior control, subjective norms, food involvement and

food neophilia on behavioral intentions is tested together with the indirect effect of food involvement and food neophilia on behavioral intentions through satisfaction and the destination image.

In Chapter 8, the results of a regional stakeholders' survey (Educational/Research Institutes, Local and Regional Public Authorities, Agricultural Unions, Associations, Cooperatives, Networks, Centers, Partnerships, Organisations, Unions, Associations, Federations of Touristic Accommodations, Managers & Employees, and the Private Sector) that was conducted in 2024 and 2025 are analysed in order to have a more holistic approach for the sustainable development of food tourism in Crete. The research is focused on the production and consumption of local agricultural products by conducting a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) using an Eisenhower matrix. Moreover, the impact of the agricultural sector on tourism, the main problems and obstacles that hinder the promotion of local agricultural products in tourism, the possibilities of collaboration of small and medium-sized tourism enterprises to offer combined tourism packages and the promotion of local agricultural products to tourists are also analyzed for the sustainable development of food/gastronomic tourism in the Region of Crete.

In Chapter 9, the main conclusions are described together with some recommendations that could drive the sustainable touristic development of the Region of Crete through the promotion of local agricultural products.

CHAPTER 1

GENERAL ECONOMIC DATA

1.1 Gross Domestic Product in Crete and Greece

During the period 2000-2025, the Gross Domestic Product (GDP) in Greece has been increased from 136.161 million euros in 2000 to 248.354 million euros in 2025, which was the highest GDP that was ever recorded in Greece based on the data of Hellenic Statistical Authority (2026), recording an increase of 82,4%. Concerning the previous year of 2024, there was an increase of 4,9% in 2025, and comparing to 2020 the increase was higher at 48,2%. From 2000 till 2008 there was a continuous increase of GDP with 75% reaching to 238.735 million euros, which was the highest GDP that was ever recorded in Greece till 2024. After that year, a continuous decrease was taking place till 2016 with 27% going to 174.448 million euros. Then a slight increase of 6% was noted till 2019 reaching 185.181 million euros, but in the Pandemic year (2020) there was again an annual decrease of 10% going to 167.540 million euros. The next five years there was a continous increase till 2025.

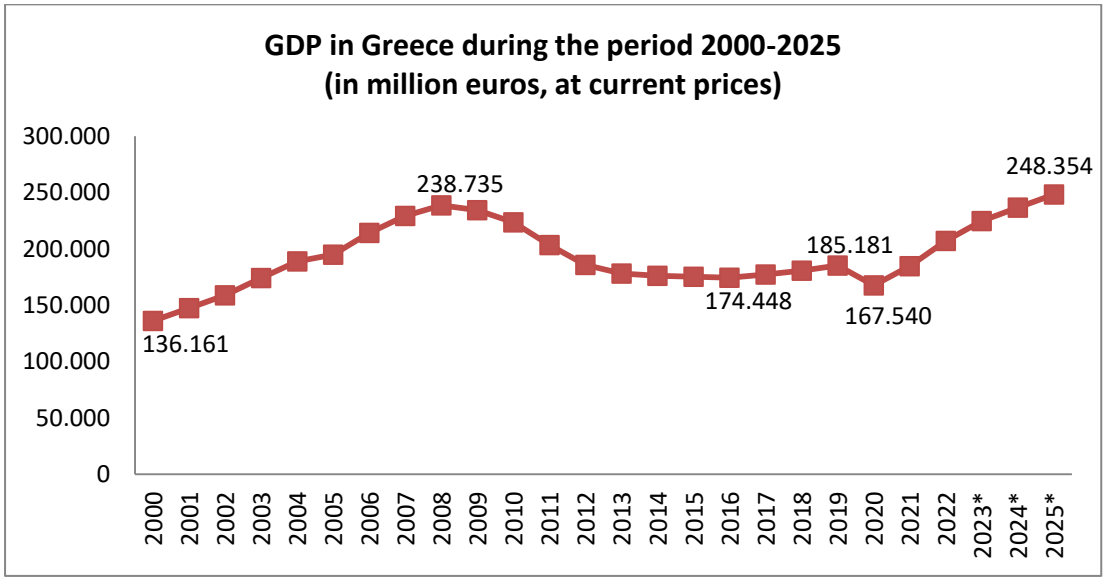


Figure 1.1 GDP in Greece during the period 2000-2025
Source: Hellenic Statistical Authority, 2026 * Provisional data

Almost the same is the evolution the Gross Domestic Product in Crete, which has also been increased from 6.579 million euros in 2000 to 11.539 million euros in 2023 based on the data of Hellenic Statistical Authority (2026), recording an increase of 75,3%. Concerning the previous year of 2022, there was an increase of 10,6% in 2023, and comparing to 2020 the

increase was bigger at 45,3%. From 2000 till 2008 there was a continuous increase of GDP with 78% reaching to 11.686 million euros, which was the highest GDP that was ever recorded in Crete. After that year, a continuous decrease was taking place till 2013 with 26,2% going to 8.630 million euros. A constant situation was taking place till 2016 and then an increase of 8,3% was noted till 2019 reaching 9.319 million euros, but in the Pandemic year (2020) there was again an annual decrease of 14,8% going to 7.942 million euros. The next three years there was a contnous increase.

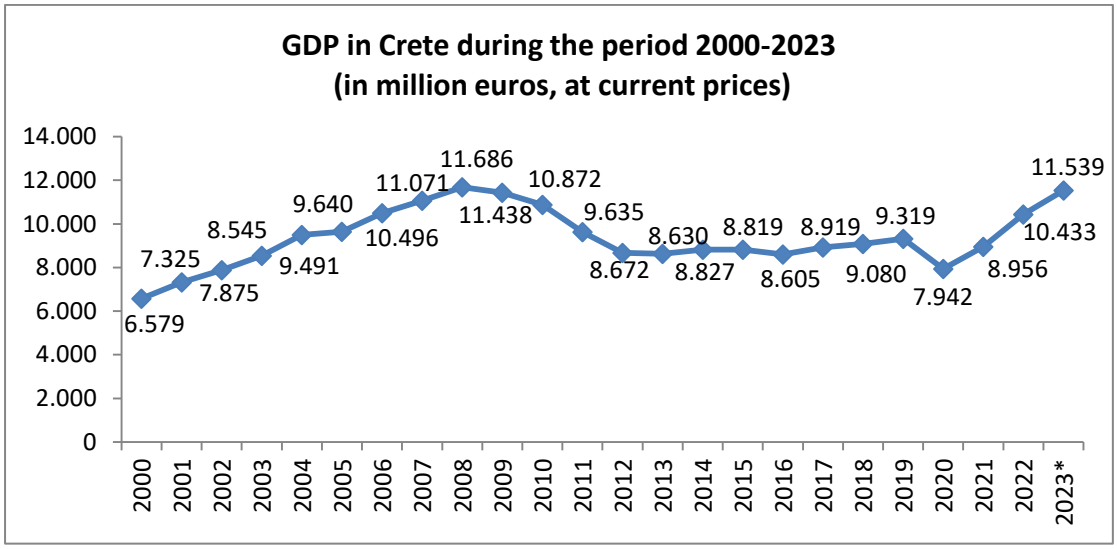


Figure 1.2 GDP in Crete during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.1.2 Gross Domestic Product in the Regional Units of Crete

Concerning the GDP of the Regional Units of Crete, Heraklion has noted the highest GDP in Crete with 5.458 million euros in 2023, having a total increase of 74,8% from 2000. From 3.122 million euros in 2000, GDP was increased to 5.798 million euros in 2008, which was the highest GDP from 2000 and onwards, recording an increase of 86%. Till 2012 there was a significant decrease of 27,4% going to 4.210 million euros and then GDP was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP by 14,3% going to 3.758 million euros and the next three years GDP was increased by 45,2% till 2023.

In the Regional Unit of Chania, GDP has been increased from 1.658 million euros in 2000 to 3.001 million euros in 2023, which is the highest GDP that was ever recorded in Chania, recording an increase of 81%. From 2000 till 2008 there was a continuous increase of GDP with 80% reaching to 2.989 million euros. Till 2012 there was a significant decrease of

25,1% going to 2.240 million euros and then GDP was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP by 16% going to 1.999 million euros and the next three years GDP was increased by 50,1% till 2023.

In the Regional Unit of Lasithi, GDP has been increased from 808 million euros in 2000 to 1.531 million euros in 2023, which was the highest GDP ever in Lasithi recording an increase of 89,5%. From 2000 till 2008 there was a continuous increase of GDP with 78% reaching to 1.436 million euros. Till 2012 there was a significant decrease of 24,5% going to 1.084 million euros and then GDP was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP by 11,4% going to 1.147 million euros and the next three years GDP was increased by 33,5% till 2023.

In the Regional Unit of Rethymnon, GDP has been increased from 991 million euros in 2000 to 1.549 million euros in 2023, which is the highest GDP that was ever recorded in Rethymnon, recording an increase of 56,3%. From 2000 till 2008 there was a continuous increase of GDP with 48% reaching to 1.463 million euros. Till 2012 there was a significant decrease of 22,2% going to 1.138 million euros and then GDP was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP by 17,8% going to 1.038 million euros and the next three years GDP was increased by 49,2% till 2023.

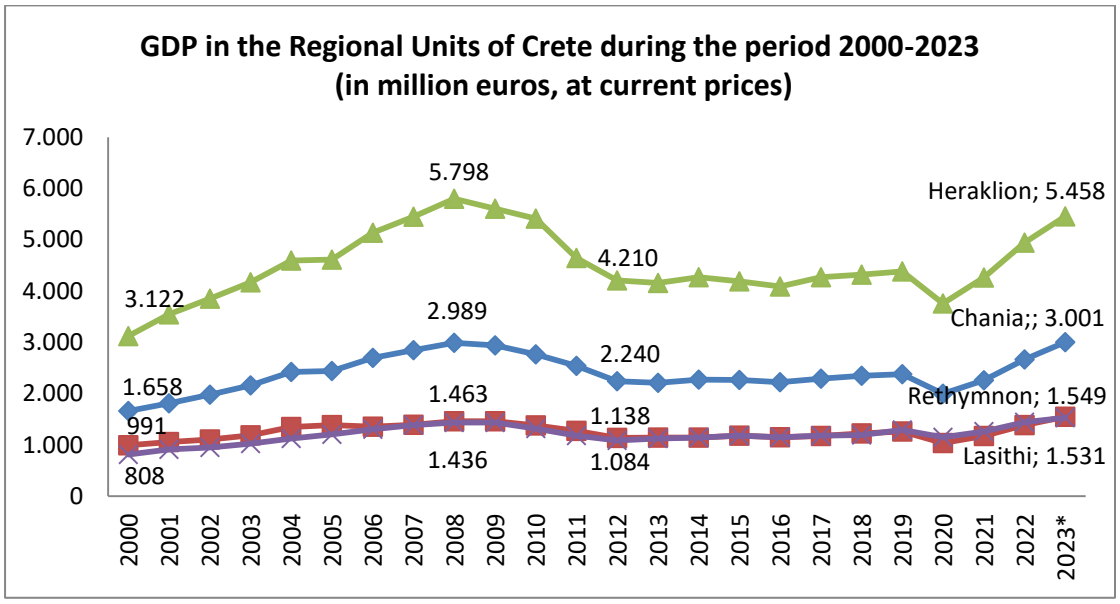


Figure 1.3 GDP in the Regional Units of Crete during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.2 Gross Domestic Product per capita in Crete and Greece

Depicting the evolution of Gross Domestic Product per capita in Greece and Crete during the period 2000-2023, it can be realized that the curves are similar, having the same trends. GDP per capita in Greece reached 21.301 euros in 2023 recording an increase of 69% from 2000. From 2000 till 2008 there was a continuous increase of GDP with 71% reaching to 21.551 euros, which was the highest GDP per capita that was ever recorded in Greece. After that year, a significant decrease was taking place till 2012 with 21,9% going to 16.831 euros. Then GDP per capita was stabilized till 2019 reaching 17.272 euros, but in the Pandemic year (2020) there was again an annual decrease of 24,3% going to 15.660 euros. The next three years there was an increase of 36% till 2023.

Likewise, GDP per capita in Crete reached 18.345 euros in 2023 recording an increase of 61,1% from 2000. From 2000 till 2008 there was a continuous increase of GDP with 66,6% reaching to 18.978 euros, which was the highest GDP per capita that was ever recorded in Crete. After that year, a significant decrease was taking place till 2012 with 27,4% going to 13.771 euros. Then GDP per capita was stabilized till 2019 reaching 14.659 euros, but in the Pandemic year (2020) there was again an annual decrease of 9,5% going to 12.475 euros. The next three years there was an increase of 47,1% till 2023.

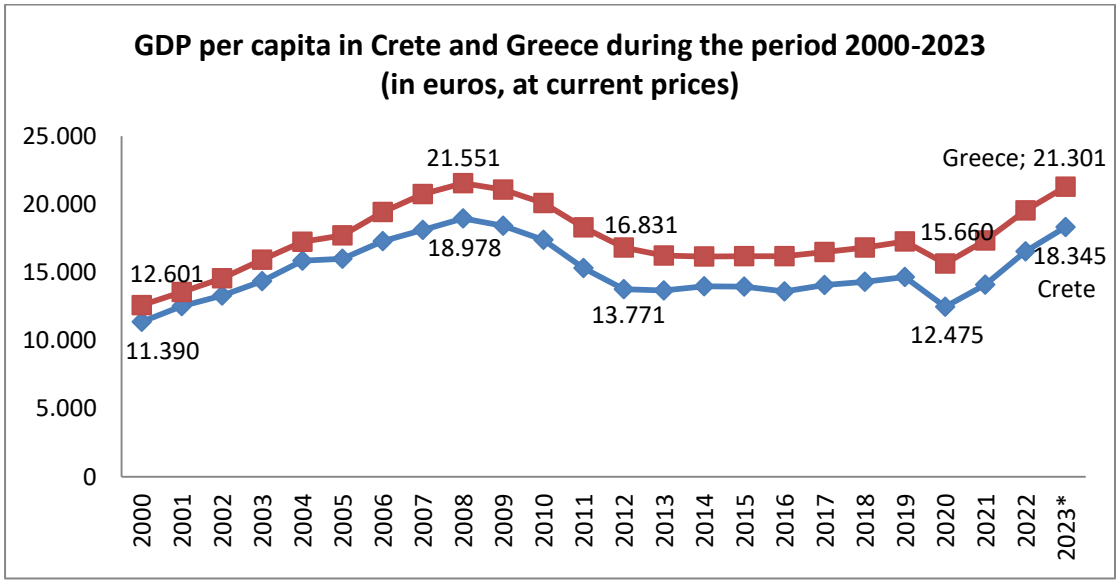


Figure 1.4 GDP per capita in Crete and Greece during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.2.1 Gross Domestic Product per capita in the Regional Units of Crete

Concerning the GDP per capita of the Regional Units of Crete, Lasithi has noted the highest GDP per capita in Crete with 21.081 euros in 2023, having a total increase of 89,2% from 2000, which was the highest GDP per capita that was ever recorded in Lasithi. From 11.144 euros in 2000, GDP per capita was increased to 19.035 euros in 2008 recording an increase of 71%. Till 2012 there was a significant decrease of 24,6% going to 14.347 euros and then unlike the other Regional Units of Crete, GDP per capita increased by 22% till 2019, reaching the amount of 17.508 euros. In the pandemic year there was an annual decrease of GDP per capita by 11% going to 15.575 euros and the next three years GDP per capita increased by 35,4% till 2023.

In the Regional Unit of Chania, GDP per capita has been increased from 11.516 euros in 2000 to 18.985 euros in 2023, recording an increase of 64,9%. From 2000 till 2008 there was a continuous increase of GDP per capita with 69% reaching to 19.409 euros, which was the highest GDP per capita that was ever recorded in Chania. Till 2012 there was a significant decrease of 27% going to 14.177 euros and then GDP per capita was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP per capita by 16,1% going to 12.497 euros and the next three years GDP per capita was increased by 51,9% till 2023.

In the Regional Unit of Rethymnon, GDP per capita has been increased from 13.026 euros in 2000 to 17.856 euros in 2023, which is the highest GDP per capita that was ever recorded in Rethymnon, recording an increase of 37,1%. From 2000 till 2008 there was a continuous increase of GDP per capita with 33,7% reaching to 17.414 euros. Till 2012 there was a significant decrease of 24,7% going to 13.118 euros and then GDP per capita was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP per capita by 17,9% going to 11.832 euros and the next three years GDP per capita was increased by 50,9% till 2023.

The Regional Unit of Heraklion has the lowest GDP per capita comparing to the other Regional Units of Crete with an amount of 17.519 euros in 2023, recording an increase of 60% from 2000, where the GDP per capita was 10.952 euros. From 2000 till 2008 there was a continuous increase of GDP per capita with 75% reaching to 19.179 euros, which was the highest GDP per capita that was ever recorded in Heraklion. Till 2012 there was a significant

decrease of 29,1% going to 13.606 euros and then GDP per capita was almost stabilized till 2019. In the pandemic year there was an annual decrease of GDP per capita by 14,5% going to 11.920 euros and the next three years GDP per capita was increased by 47% till 2023.

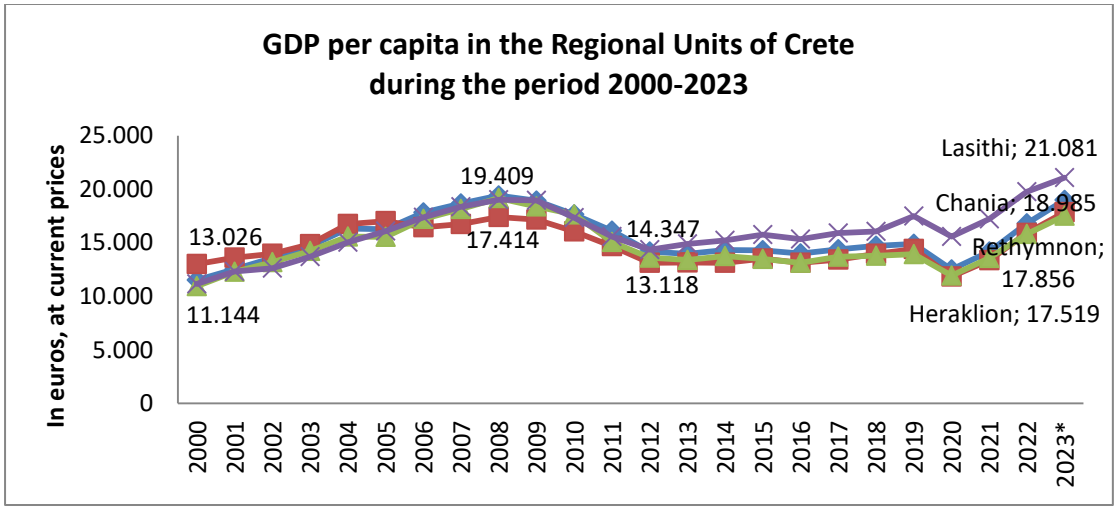


Figure 1.5 GDP per capita in the Regional Units of Crete during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.3 Contribution of the Primary sector in Gross Domestic Product in Crete and Greece

The Contribution of the Primary sector of Greece to the national GDP based on the Gross Added Value was formed at 4,3% in 2023. The contribution of the Primary sector was higher in 2000 with 6,2%, which was the highest percentage held during the period 2000-2023. Then, till 2008, the contribution of the Primary sector decreased to 3,3% and it was the same percentage till 2010. That percentage was the lowest contribution of the Primary sector to the national GDP after the year 2000.

The Contribution of the Primary sector of Crete to the regional GDP was formed at 9,9% in 2023. The contribution of the Primary sector was higher in 2000 with 10,9%, reaching even 12,4% in 2002, which was the highest percentage held during the period 2000-2023. From 2004 till 2010 there was a continuous decrease of the contribution of the Primary sector to regional GDP going to 6,2% and reaching even 5,8% after three years in 2013, which was the lowest contribution of the Primary sector in the regional GDP.

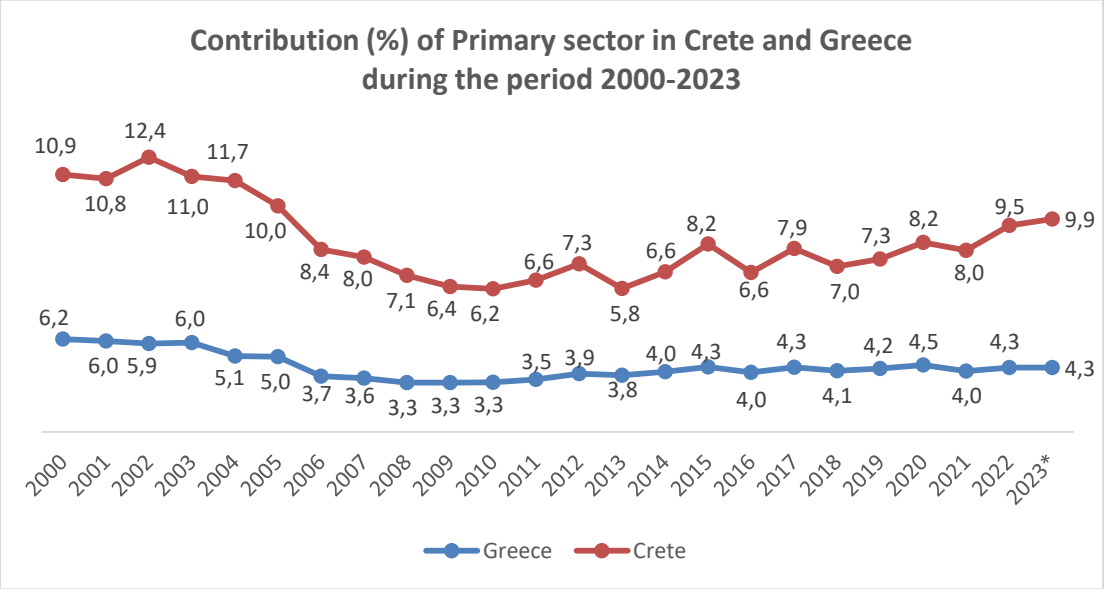


Figure 1.6 Contribution of Primary sector in Crete and Greece during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.3.1 Contribution of the Primary sector in Gross Domestic Product in the Regional Units of Crete

The Contribution of the Primary sector in the Regional Units of Crete is rather low. The Regional Unit of Lasithi has the highest contribution in the Primary sector from 2006 comparing to the other Regional Units which corresponds at 19,8% of the GDP of Lasithi in 2023, which is the highest contribution of the Primary sector in Lasithi during the period 2000-2023. In 2000, the contribution of the Primary sector was 14,4% and it was stabilized at those percentages till 2008. Then, in the following five years a decrease took place and the contribution of the Primary sector went to 8,7% in 2013, which was the lowest rate during the period 2000-2022. From 2014, an increase was taking place till 2020, reaching the percentage of 19,6%.

The Primary sector of the Regional Unit of Rethymnon contributed at 12,2% in the GDP of Rethymnon in 2023. The contribution of the Primary sector was higher in 2000 with 14,4%, and in 2004 the contribution reached at 19,4% which was the highest percentage held during the period 2000-2023 in Rethymnon. A vast decrease took place in 2006 and the contribution of the Primary sector was at lower levels from 2006 and onwards.

The Primary sector of the Regional Unit of Chania contributed at 10,2% in the GDP of Chania in 2023.The contribution of the Primary sector was a little bit higher in 2000 with

10,3%, and two years later reached at 11,7% which was the highest percentage held during the period 2000-2023 in Chania.

The Primary sector of the Regional Unit of Heraklion contributed less than the other Regional Units of Crete, since in 2023 contributed at 6,3% in the GDP of Heraklion. Except the period 2009-2012, where the regional Unit of Chania recorded the lowest contribution of the Primary sector in the Prefectural GDP, all the other years from 2000 and onwards the Regional Unit of Heraklion has the lowest contribution of the Primary sector comparing to the other Regional Units of Crete.

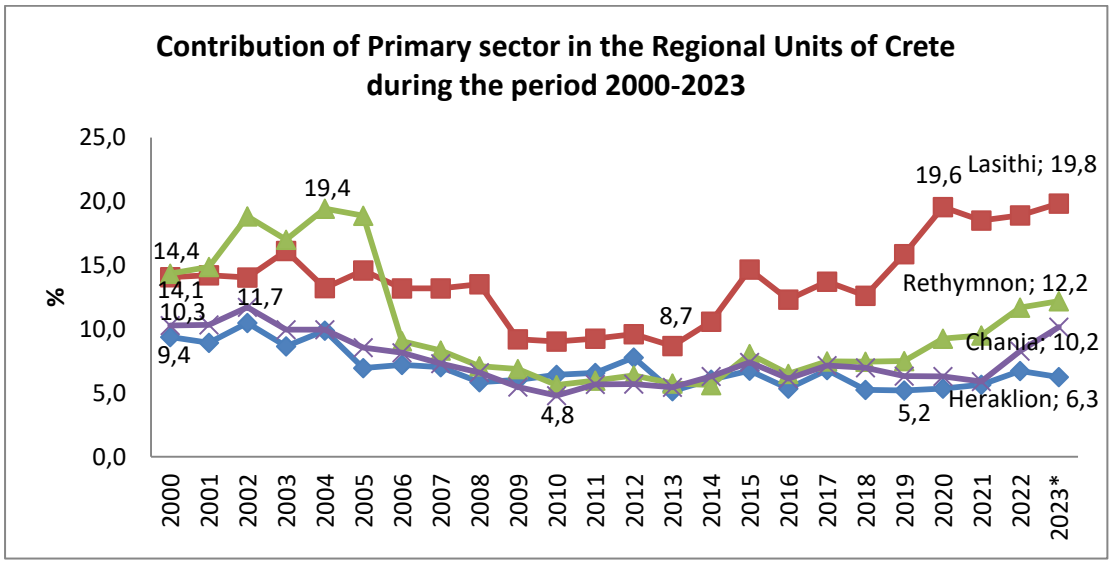


Figure 1.7 Contribution of Primary sector in the Regional Units of Crete during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.4 Contribution of the Secondary sector in Gross Domestic Product in Crete and Greece

The Contribution of the Secondary sector of Greece to the national GDP was formed at 17% in 2023. The contribution of the Secondary sector was higher in 2000 with 21%, reaching the percentage of 23,2% in 2006, which was the highest percentage held during the period 2000-2023. Then, till 2017, the contribution of the Secondary sector decreased to 15,5%, which was the lowest percentage in that period.

The Contribution of the Secondary sector of Crete to the regional GDP was formed at 12,5% in 2023. The contribution of the Secondary sector was higher in 2000 with 15,6%, reaching even 19,5% in 2006, which was the highest percentage held during the period 2000-2023.

From 2006 till 2017 there was a continuous decrease of the contribution of the Secondary sector to regional GDP going to 11,6%, which was the lowest contribution of the Secondary sector in the regional GDP.

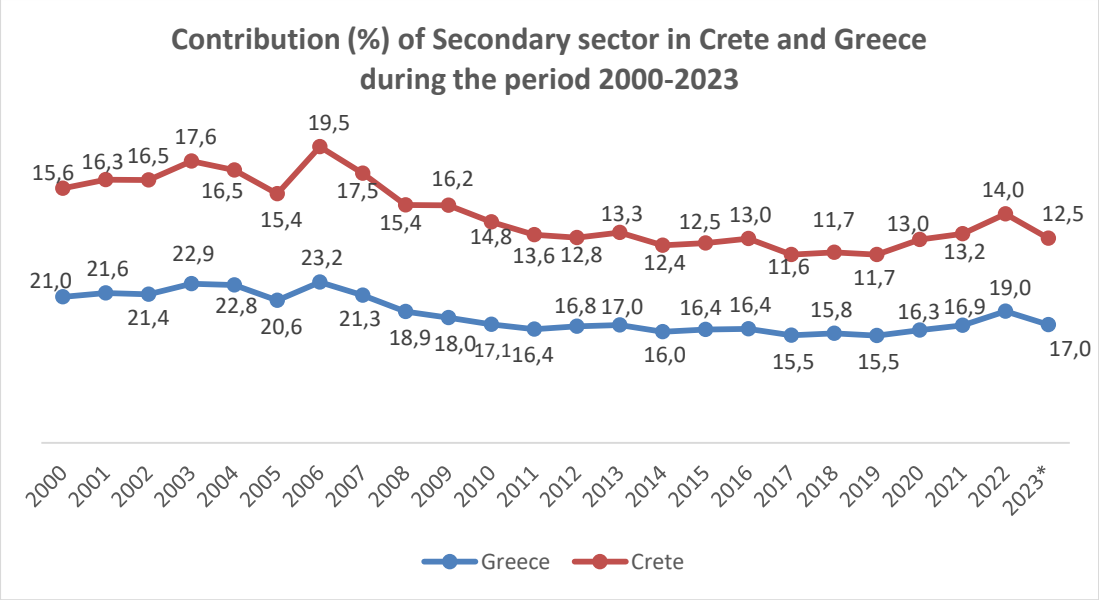


Figure 1.8 Contribution of Secondary sector in Crete and Greece during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.4.1 Contribution of the Secondary sector in Gross Domestic Product in the Regional Units of Crete

Concerning the Secondary sector, the Regional Unit of Lasithi has also the highest contribution in the Secondary sector in 2002 and from 2004 till 2022 comparing to other Regional Units. In 2023 GDP of Lasithi corresponds at 12,8%. The highest contribution in the Secondary sector recorded in 2006 with 24,2% in Lasithi and in Crete as well. All the other Regional Units seems to have the same route throughout the period 2000-2022. The Regional Unit of Rethymnon has the lowest consecutive contribution in the Secondary sector from 2000-2003 and from 2011-2023, which corresponds to 10,7% in 2023. The lowest contribution in the Secondary sector not only in Rethymnon but also in Crete was recorded in 2017 with 9,3%. In 2023, the Regional Unit of Heraklion corresponds in the Secondary sector at 13,3%, having the highest contribution in Crete, whereas the contribution of the Secondary sector in the Regional Unit of Chania was set at 11,8%.

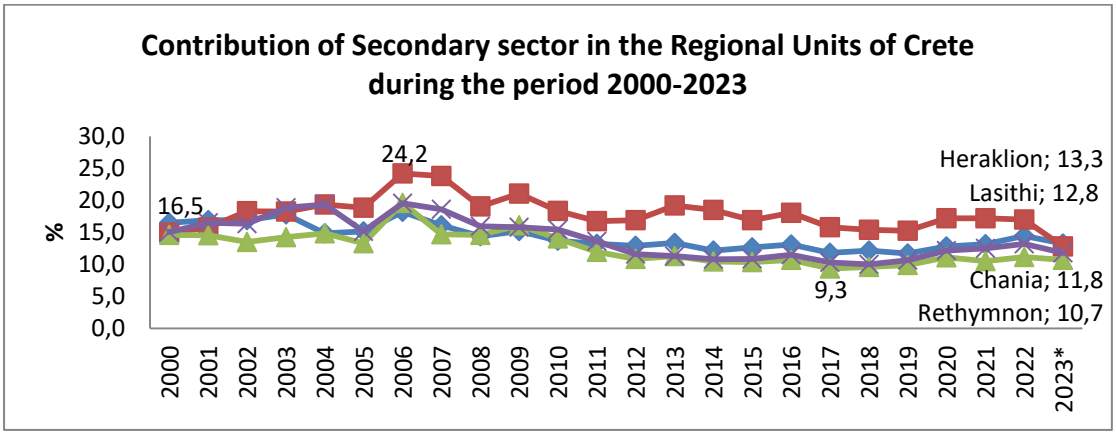


Figure 1.9 Contribution of Secondary sector in the Regional Units of Crete during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.5 Contribution of the Tertiary sector in Gross Domestic Product in Crete and Greece

The Contribution of the Tertiary sector of Greece to the national GDP was formed at 78,7% in 2023 constituting the most developed sector in Greece. The contribution of the Tertiary sector was lower in 2000 with 72,8% and after three years it went to 71,1%, which was the lowest percentage during the period 2000-2022. After that period, the contribution of the sector to the national GDP was increasing reaching the percentage of 80,3% in 2019, which was the highest percentage held during that period.

The Contribution of the Tertiary sector of Crete to the regional GDP was formed at 77,7% in 2023. The contribution of the Tertiary sector was lower in 2000 with 73,4%, and after two years it went to 71,1%, which was the lowest percentage during the period 2000-2023. After that period, the contribution of the sector to the regional GDP was increasing reaching the percentage of 81,4% in 2018, which was the highest percentage held during that period.

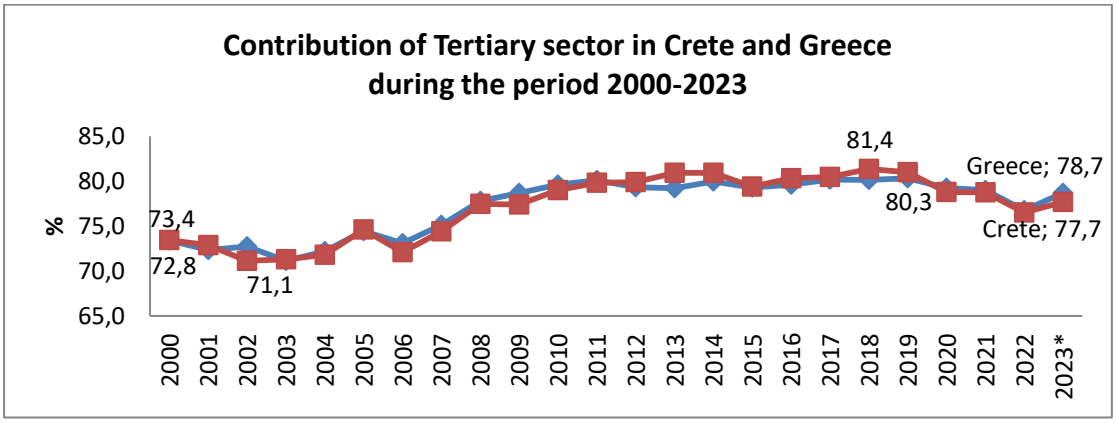


Figure 1.10 Contribution of Tertiary sector in Crete and Greece during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.5.1 Contribution of the Tertiary sector in Gross Domestic Product in the Regional Units of Crete

The Tertiary sector is the most developed sector in Crete. The Regional Unit of Lasithi seems to have the lowest contribution in the Tertiary sector (apart from 2004) during the period 2000-2023, with the lowest percentage to be recorded in 2006 with 62,6%, which reached to 67,4% in 2023. All the other Regional Units seems to have the same route throughout the period 2000-2023. The Regional Unit of Heraklion has the highest contribution in the Tertiary sector with 80,5% in 2023, the Regional Unit of Chania follows with 78% and then the Regional Unit of Rethymnon with 77,1%. Rethymnon has recorded the highest contribution in the Tertiary Sector not only in the Prefectural sector but in Crete as well in 2014 with 83,9%.

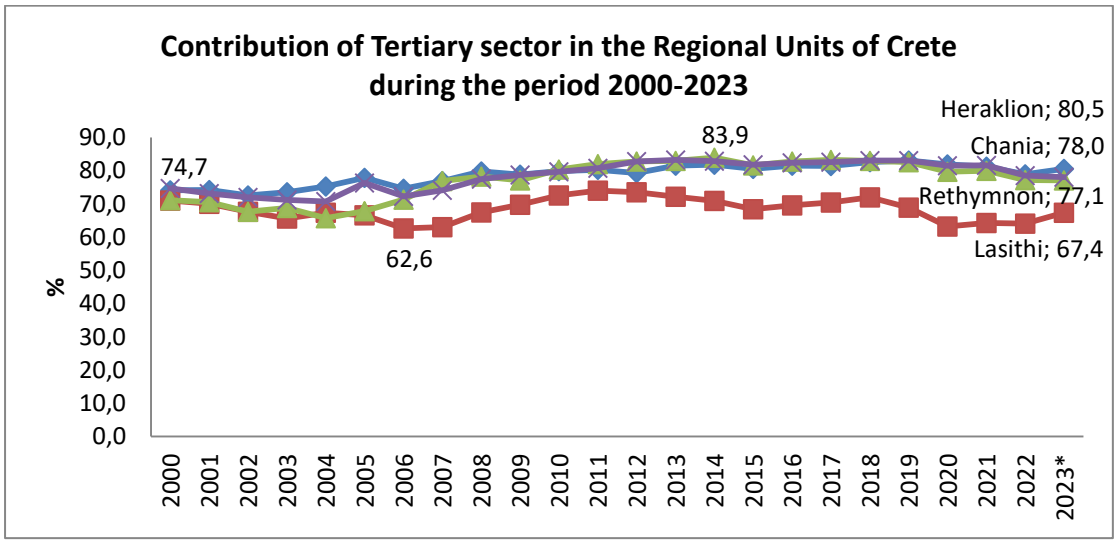


Figure 1.11 Contribution of Tertiary sector in the Regional Units of Crete during the period 2000-2023
Source: Hellenic Statistical Authority, 2026 * Provisional data

1.6 Employment in Crete and Greece

During the period 2010-2025, the employment in Greece has been decreased from 4,4 million in 2010 to 4,3 million in 2025 based on the data of the Labor Force Survey of Hellenic Statistical Authority (2026), recording a decrease of 1,1%. Concerning the previous year of 2024, there was an increase of 1,5% in 2025, and comparing to 2019 the increase was higher by 11%. During the period 2010-2013, employment was decreased by 20% and from 2013 till 2025 there was an increase in employment of 23,5%. In the Pandemic year (2020) there was an annual decrease of 0,9%.

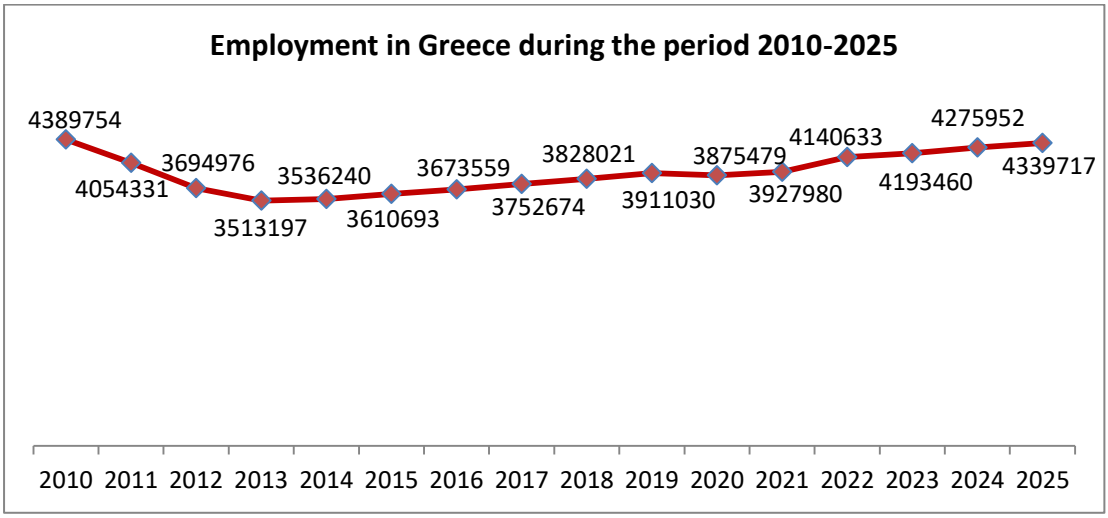


Figure 1.12 Employment in Greece during the period 2010-2025
Source: Hellenic Statistical Authority, Labor Force Survey, 2026

During the period 2010-2025, the employment in Crete has been increased from 260.683 in 2010 to 270.670 in 2025, recording an increase of 3,8%. Concerning the previous year of 2024, there was an increase of 4,7% in 2025, and comparing to 2019 the increase was 7%. During the period 2010-2015, employment was decreased by 20% and from 2015 till 2025 there was an increase in employment of 29%. In the Pandemic year (2020) there was an annual decrease of 8,5%.

Crete represents the 6,2% of the total employment of Greece in 2025 and throughout the period 2014-2025 the percentage varies from 5,8% in 2015 to 6,5 in 2019.

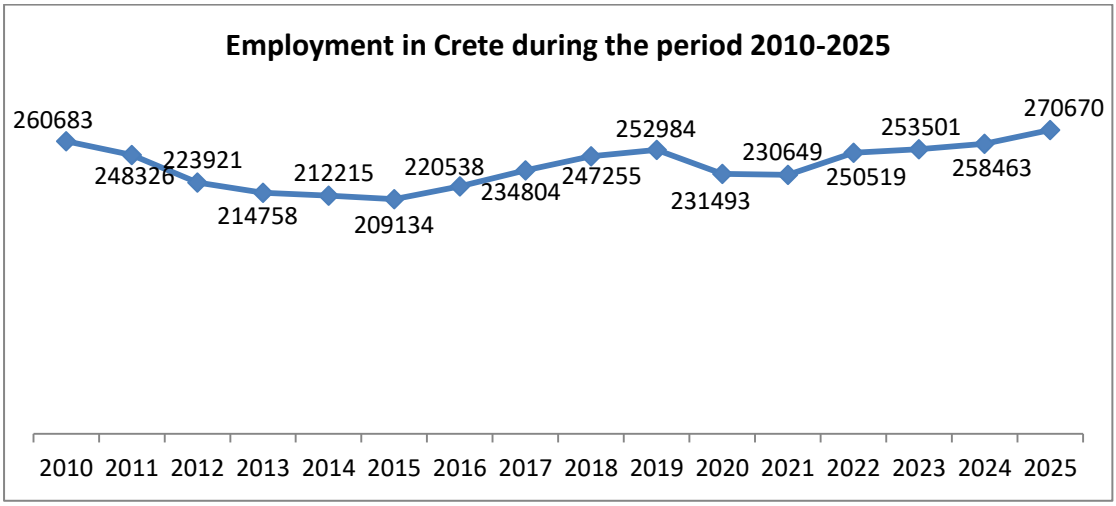


Figure 1.13 Employment in Crete during the period 2010-2025
Source: Hellenic Statistical Authority, Labor Force Survey, 2026

1.6.1 Employment per sector in Crete and Greece

The contribution of the employment in the Tertiary sector of Greece seems to be the highest comparing to the other sectors in Greece, with 76,6% of the total employment to be employed in that sector in 2023, one of the highest percentage in the period 2000-2023. In 2000 the 66,2% of the total employees, which was the lowest percentage till 2022, were employed in the Tertiary sector and there was a continuous increase in employment throughout the years till 2022.

The employment in the Secondary sector was consisted of 17,7% of the total employment in Greece in 2000, then the next year went to 18,1%, which was the highest percentage till 2023, and then it started decreasing till 2023 going to 13,3%.

The Primary sector is the less developed sector since 10,1% of the total employment was employed in that sector in 2023. That percentage was the lowest through the period 2000-2023. The percentage of employment was higher in 2000 with 16,2%, which was the highest percentage from 2000 and onwards.

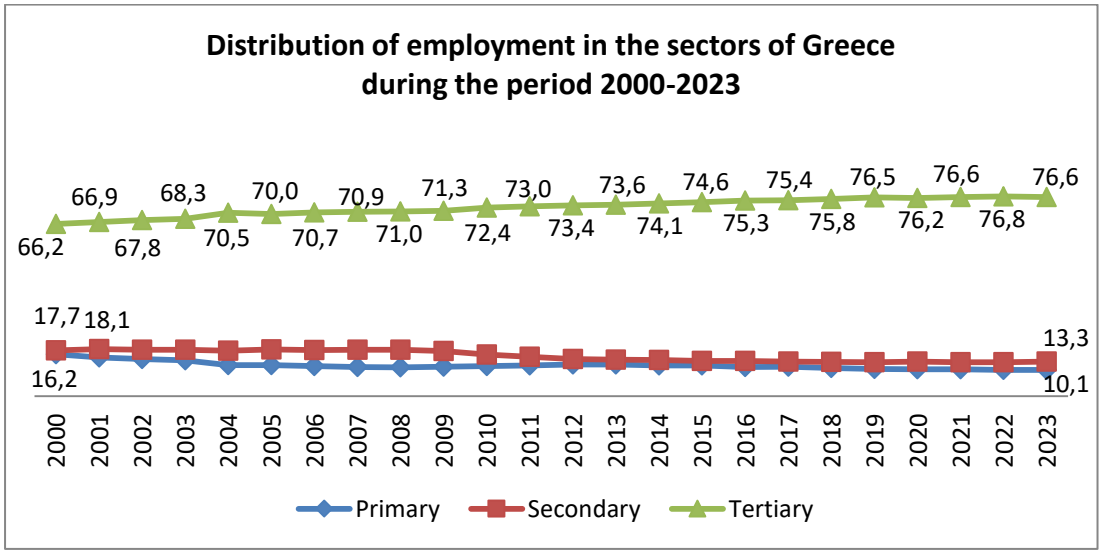


Figure 1.14 Distribution of employment in the sectors of Greece during the period 2000-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2026

The contribution of the employment in the Tertiary sector of Crete is also the highest comparing to the other sectors in Greece, with 73,2% of the total employment to be employed in that sector in 2023. In 2000 the percentage of employees was lower at 60,1% and the next year it went to 58,6% which was the lowest percentage till 2023. Then there was a contnuous

increase in employment till 2019 which reached the 73,5%. In 2022, is recorded the highest percentage with 73,6%.

The employment in the Secondary sector, which is the less developed in Crete, was consisted of 11,4% of the total employment in Crete in 2023, which was one of the lowest percentages throughout the period 2000-2023. The percentage of employment was higher in 2000 with 12,4%, then it was increasing till 2008 that went to 15,4%, it was stabilized for a year and then it started decreasing till 2022.

The Primary sector was consisted of 15,4% of the total employment in 2023. That percentage of employment was higher in 2000 with 27,5%, being the highest percentage rate that was employed in the Primary sector from 2000 and onwards. Then it started decreasing till 2008 with 16% and afterwards an increase took place till 2012 that reached the 19,8%. After that year there was a continuous decrease in the employment rate of the Primary sector till 2019 that went to 15,2%. The lowest percentage from 2000 and onwards is recorded in 2022 with 15,1%.

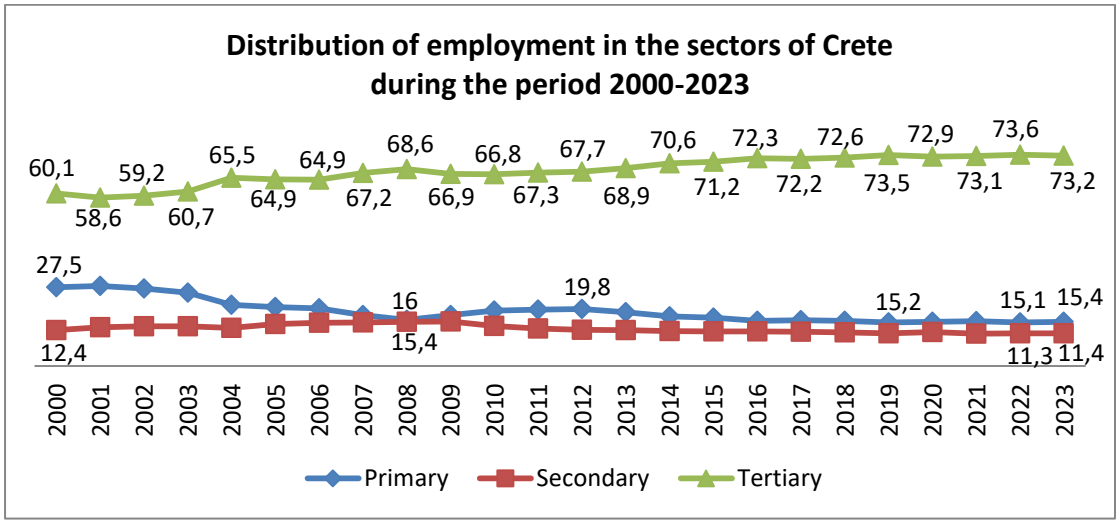


Figure 1.15 Distribution of employment in the sectors of Crete during the period 2000-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2026

1.6.2 Employment per type in Crete and Greece

Concerning the type of employment in 2023 in Greece the full-time employees were 3.880.845 consisted of the 92,5% of the total employment, whereas the part-time employees were 312.616 representing the 7,5% of the total employment in Greece. Throughout the period 2014-2023 the percentage of full-time employees varied from 90,5%-92,5%, whereas

the percentage of part-time employees varied from 7,5%-9,9% of the total employment in Greece.

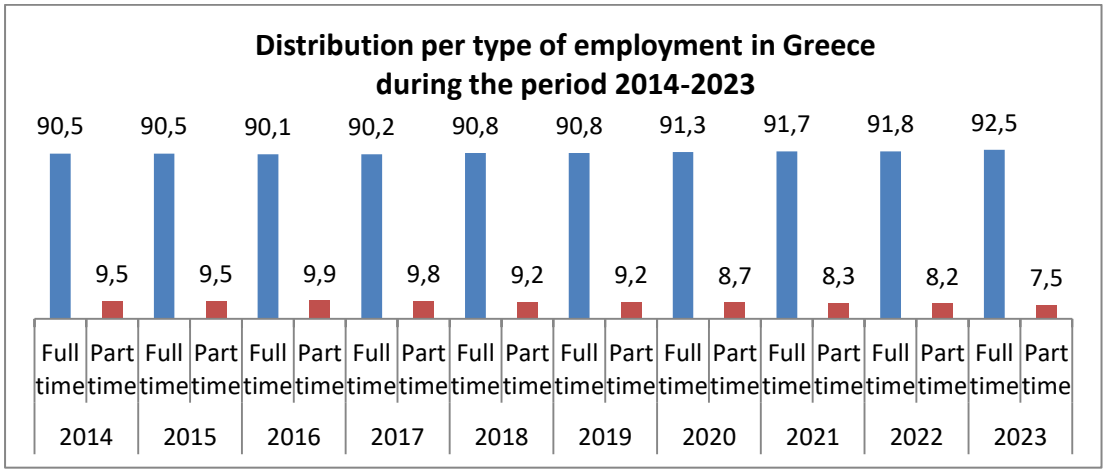


Figure 1.16 Distribution per type of employment in Greece during the period 2014-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2025

Almost the same percentages are recorded in Crete concerning the type of employment. In 2023 the full-time employees were 234.937 consisted of the 92,7% of the total regional employment, whereas the part-time employees were 18.564 representing the 7,3% of the total employment in Crete. Throughout the period 2014-2023 the percentage of full-time employees varied from 90,4%-95%, whereas the percentage of part-time employees varied from 5%-9,6% of the total employment in Greece.

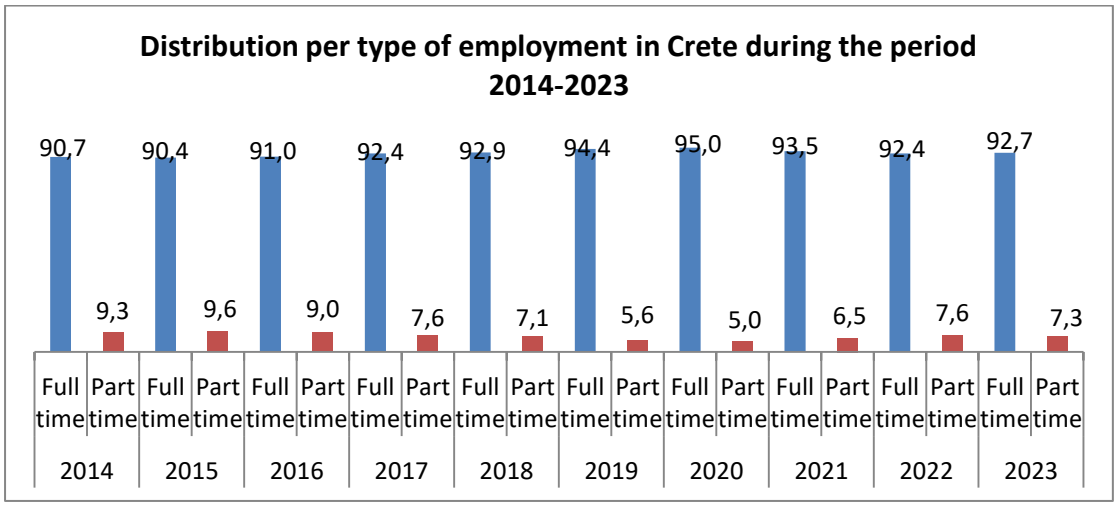


Figure 1.17 Distribution per type of employment in Crete during the period 2014-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2025

1.6.3 Employment per sex in Crete and Greece

Regarding the sex of employment in 2023 in Greece the men employees were 2.397.422 consisted of the 57,2% of the total employment, whereas the women employees were 1.796.038 representing the 42,8% of the total employment in Greece. Throughout the period 2014-2023 the percentage of men employees varied from 57,2%-58,5%, whereas the percentage of women employees varied from 41,5%-42,8% of the total employment in Greece.

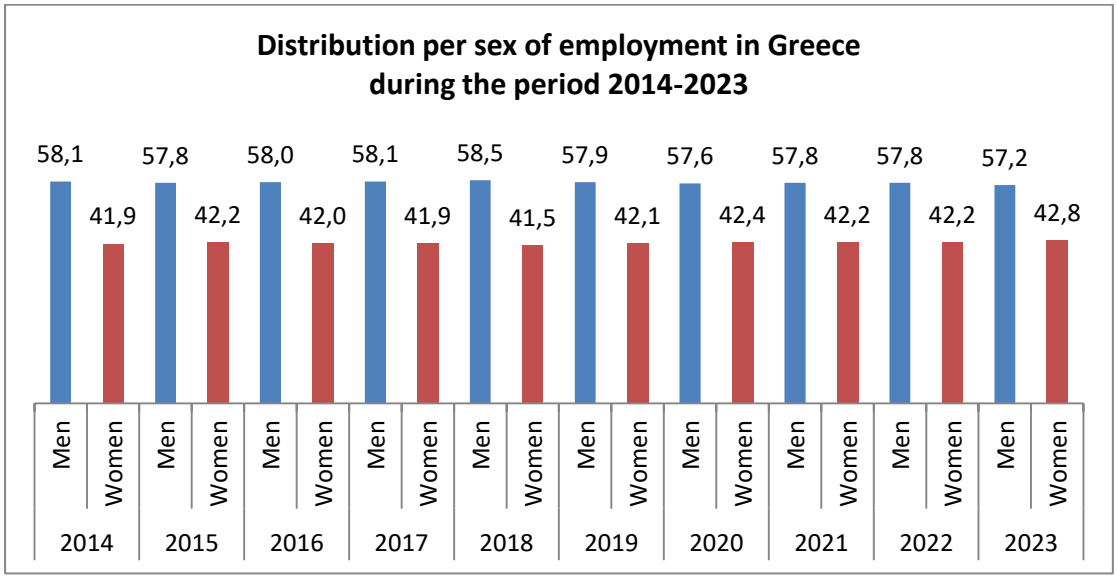


Figure 1.18 Distribution per sex of employment in Greece during the period 2014-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2025

Almost the same percentages are recorded in Crete concerning the sex of employment. In 2023 the men employees were 144.788 consisted of the 57,1% of the total regional employment, whereas the women employees were 108.714 representing the 42,9% of the total employment in Crete. Throughout the period 2014-2023 the percentage of men employees varied from 56,6%-58,6%, whereas the percentage of women employees varied from 41,4%-43,4% of the total employment in Greece.

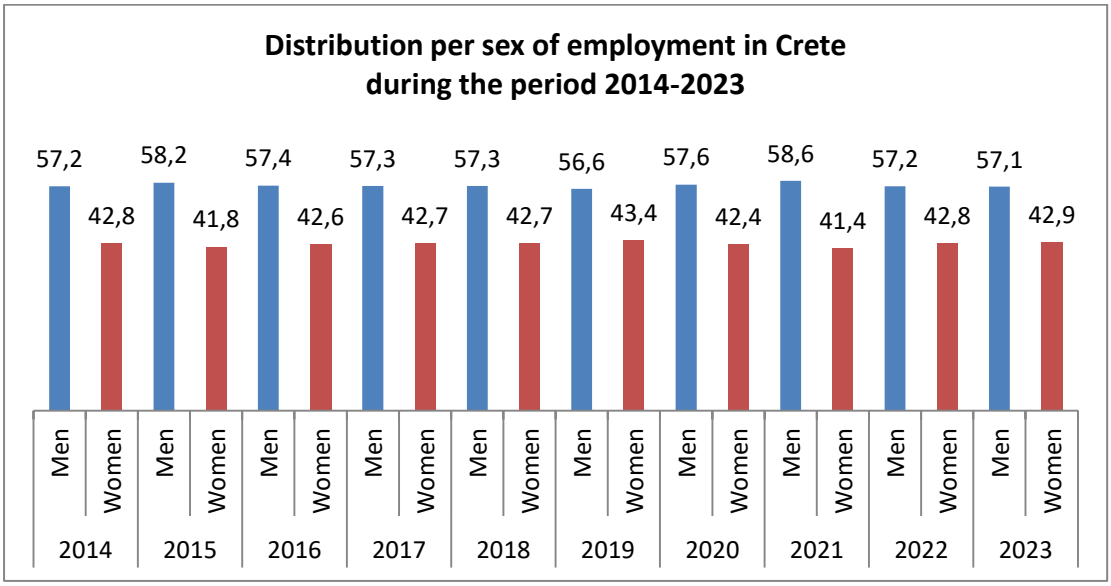


Figure 1.19 Distribution per sex of employment in Crete during the period 2014-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2025

1.6.4 Employment per age in Crete and Greece

Regarding the age of employment in 2023 in Greece the employees between 15-24 years old were 192.597 consisted of the 4,6% of the total employment, the employees between 25-34 years old were 798.298 consisted of the 19% of the total employment, the employees between 35-44 years old were 1.071.077 consisted of the 25,5% of the total employment, the employees between 45-54 years old were 1.233.545 consisted of the 29,4% of the total employment and the employees 55 years old and over were 897.942 consisted of the 21,4% of the total employment. Throughout the period 2014-2023 the percentage of the employees between 15-24 years old varied from 3,6% to 4,6%, the percentage of the employees between 25-34 years old decreased from 22,9% to 18,8% in 2021, the percentage of the employees between 35-44 years old decreased from 31,2% to 25,5%, , the percentage of the employees between 45-54 years old increased from 27,4% to 30,3% in 2021 and the percentage of the employees 55 years old and over increased from 14,4% to 21,4%, of the total employment in Greece.

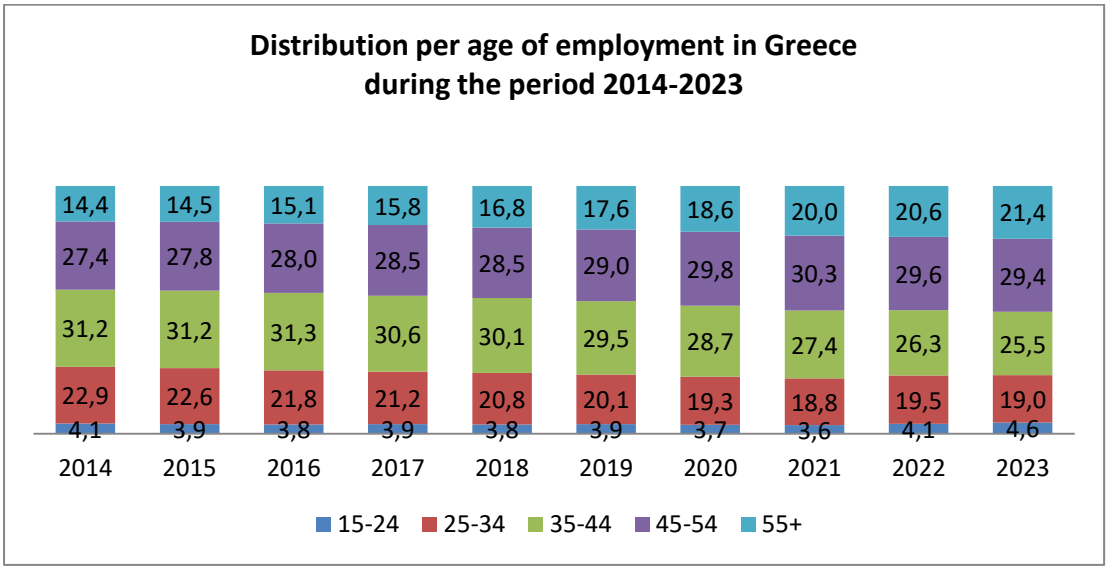


Figure 1.20 Distribution per age of employment in Greece during the period 2014-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2025

Concerning the age of employment in 2023 in Crete the employees between 15-24 years old were 14.165 consisted of the 5,6% of the regional employment, the employees between 25-34 years old were 46.261 consisted of the 18,2% of the regional employment, the employees between 35-44 years old were 65.337 consisted of the 25,8% of the regional employment, the employees between 45-54 years old were 72.633 consisted of the 28,7% of the regional employment and the employees 55 years old and over were 55.106 consisted of the 21,7% of the regional employment. Throughout the period 2014-2023 the percentage of the employees between 15-24 years old varied from 3,6% to 5,6%, the percentage of the employees between 25-34 years old decreased from 24,2% to 18,2% in 2021, the percentage of the employees between 35-44 years old varied from 25,8% to 31,6%, , the percentage of the employees between 45-54 years old varied from 25,5% to 30,2% and the percentage of the employees 55 years old and over increased from 13,9% to 21,7%, of the total employment in Crete.

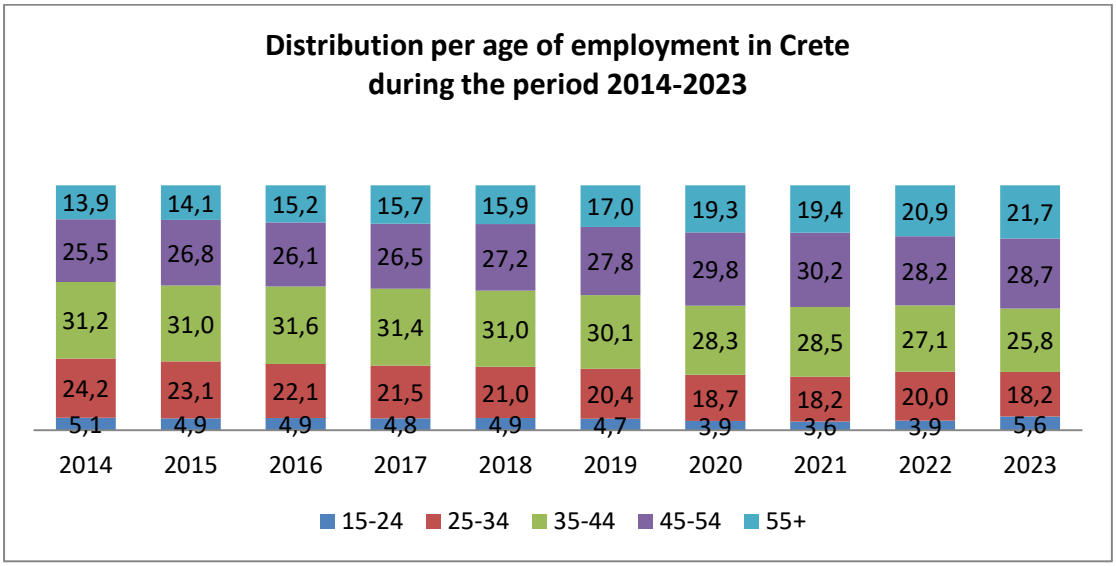


Figure 1.21 Distribution per age of employment in Crete during the period 2014-2023
Source: Hellenic Statistical Authority, Labor Force Survey, 2025

1.6.5 Unemployment rate in Crete and Greece

The Unemployment rate in Greece has reached 8,9% in 2025. The unemployment rate was lower in 1988 with 7,7% and after two years it went to 7%, which was the lowest unemployment rate in Greece during the period 1988-2025. After the year 1990 the rate was increasing and it reached 12,1% in 1999. Then, the rate was decreasing going to 7,8% in 2008. The next years the unemployment rate was increasing and it reached 27,5% in 2013, which was the highest unemployment rate ever recorded in Greece during the period 1988-2025. The following years the unemployment rate continuously started decreasing.

The evolution of the unemployment rate in Crete is similar to the Greek one. The unemployment rate has reached 5,2% in 2025. The unemployment rate was lower in 1988 with 3,5%, which was the lowest unemployment rate in Crete during the period 1988-2025. The same percentage was recorded in 1996 as well. After two years the unemployment rate reached 8,6% and in 2007 it decreased to 5,4%. The next years the unemployment rate was increasing and it reached 24,9% in 2013, which was the highest unemployment rate ever recorded in Crete during the period 1988-2025. The following years the unemployment rate started decreasing to 11,7% till 2019. Then in the pandemic year 2000 the unemployment rate increased to 17,3%, it went to 16,4% in 2021 and then it substantially decreased till 2025.

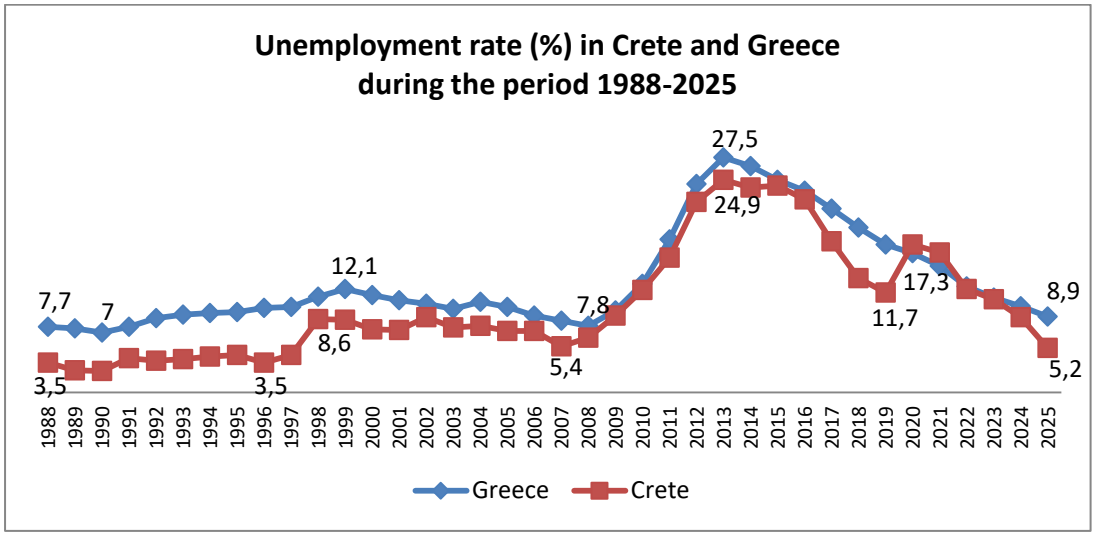


Figure 1.22 Unemployment rate in Crete and Greece during the period 1988-2025
Source: Hellenic Statistical Authority, 2026

1.7 Contribution of tourism on GDP

According to estimations of the Instituite of Greek Tourism Confederation, the direct contribution of tourism on the national GDP was 13% in 2025, being the highest percentage during the 2018-2025 period, increasing by 0,2 units compared to the previous year 2024 which was 12,8%. The percentage was 11,9% in 2018: it went up to 12,7% in 2019 and in the pandemic year (2020), it dropped to 3,6%. The direct contribution of tourism in the national GDP then started increasing till 2023. In Crete, the direct contribution of tourism is much higher compared to Greece. In 2025 the direct contribution of tourism on regional GDP was 48,8%, with a drop of 7,2 units compared to 2024 when it reached 56%. In 2018 the percentage was 47,5%; it went up to 51,2% the next year and in the pandemic year it dropped to 15,3%. The direct contribution of tourism in the regional GDP then started increasing till 2023 reaching 70% being the highest percentage during the 2018-2025 period. The last two years, the direct contribution of tourism in the regional GDP recorded a sharp drop of 21,2 units.

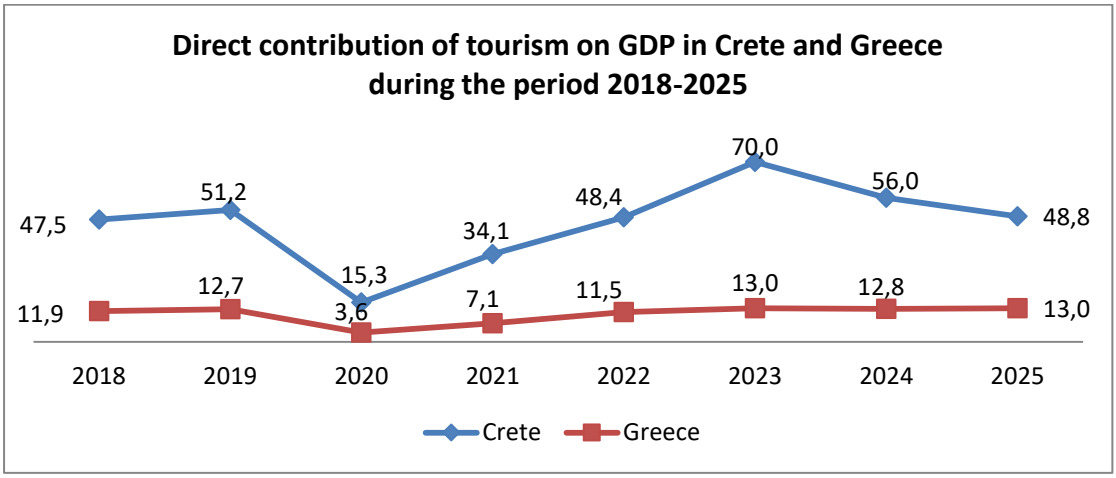


Figure 1.23 Direct contribution of tourism on GDP in Crete and Greece during the period 2018-2025
Sources: Institute of Greek Tourism Confederation, 2026

1.8 Distribution of employment per touristic branch

Concerning employment per branch in Crete in 2024, employees in the accommodation branch numbered 22.605, comprising 8,7% of the regional employment, which was the highest percentage during the 2014-2024 period. Employees in the catering services numbered 23.616, comprising 9,1% of the regional employment, while the employees of all the other branches numbered 212.241, comprising 82,1% of the regional employment, which was the lowest percentage during the 2014-2024 period. Throughout the 2014-2024 period the percentage of employees in the accommodation branch varied from 5,3% in 2020 to 8,7% in 2024. The percentage of employees in the catering services varied from 5,8% in 2021 to 9,5% in 2015, while the percentage of employees in all the other branches in Crete varied from 82,1% in 2024 to 88,4% in 2021 for the total employment in Crete.

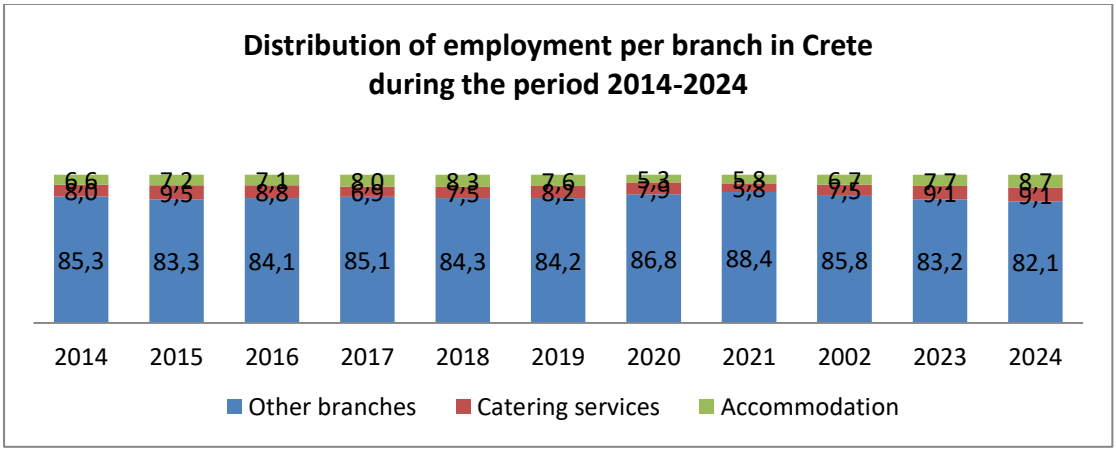


Figure 1.24 Distribution of employment per branch in Crete during the period 2014-2024
Sources: Hellenic Statistical Authority, Labor Force Survey, 2025; Institute of Greek Tourism Confederation, 2025

1.8.1 Distribution of employment per type and touristic branch

Regarding employment per type and branch in Crete in 2024, full-time employees in the accommodation branch numbered 21.999 comprising 9% of the full-time regional employment, while full-time employees in the catering services numbered 22.157 also comprising 9% of the full-time regional employment. Those percentages were the highest per sector during the 2014-2024 period. Throughout the 2014-2024 period, the percentage of full-time employees in the accommodation branch varied from 5,5% in 2020 to 9% in 2024; the percentage of full-time employees in the catering services varied from 5,3% in 2021 to 9% in 2024; part-time employees in the accommodation branch in 2024 numbered 607 comprising 4,7% of the part-time regional employment; finally, part-time employees in the catering services numbered 1.459 comprising 11,2% of the part-time regional employment. Throughout the 2014-2024 period, the percentage of part-time employees in the accommodation branch varied from 1% in 2018 to 4,8% in 2023, while the percentage of part-time employees in the catering services varied from 10,5% in 2017 to 22,1% in 2019.

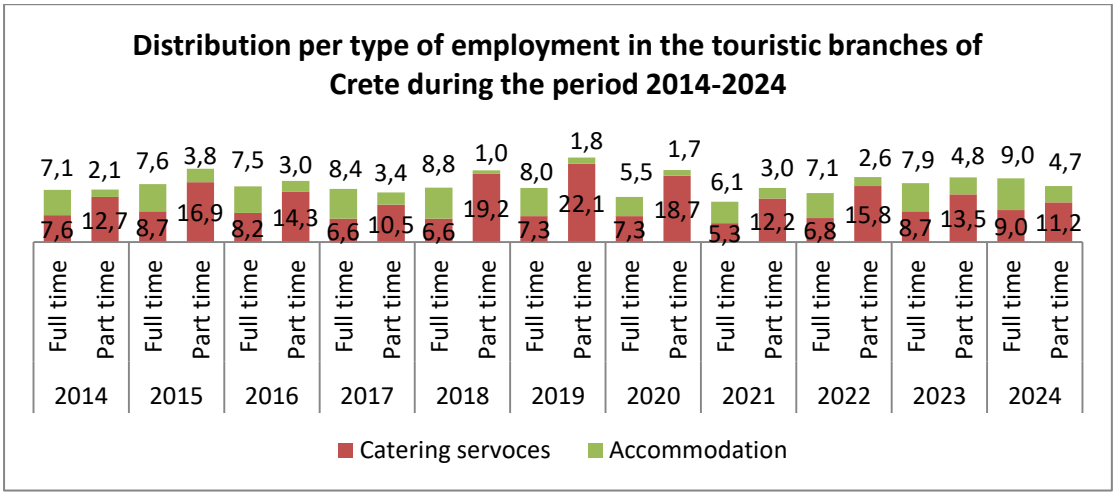


Figure 1.25 Distribution per type of employment in the touristic branches of Crete during the period 2014-2024
Sources: Hellenic Statistical Authority, Labor Force Survey, 2025; Institute of Greek Tourism Confederation, 2025

1.8.2 Distribution of employment per gender and touristic branch

Concerning employment per gender and branch in Crete in 2024, male employees in the accommodation branch numbered 10.591 comprising 7,2% of male regional employment, which was the highest percentage in the sector during the 2014-2024 period, while male employees in the catering services numbered 12.520 comprising 8,5% of the male regional employment. Throughout the 2014-2024 period the percentage of male employees in the

accommodation branch varied from 4,2% in 2020 to 7,2% in 2024; the percentage of male employees in the catering services varied from 5,4% in 2021 to 8,9% in 2015; female employees in the accommodation branch in 2024 numbered 12.014 comprising 10,9% of female regional employment; finally, female employees in the catering services numbered 11.096 comprising 10% of female regional employment. Throughout the 2014-2024 period the percentage of women employees in the accommodation branch varied from 6,7% in 2020 to 11,1% in 2017, while the percentage of women employees in the catering services varied from 6,3% in 2021 to 10,2% in 2015.

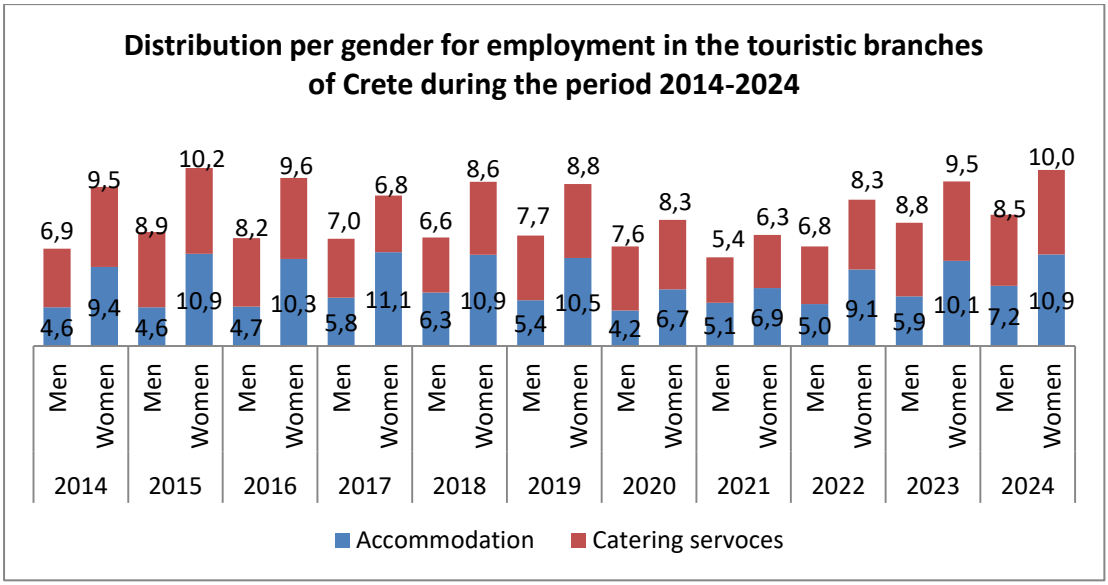


Figure 1.26 Distribution per gender of employment in the touristic branches of Crete during the period 2014-2024
Sources: Hellenic Statistical Authority, Labor Force Survey, 2025; Institute of Greek Tourism Confederation, 2025

1.8.3 Distribution of employment per age and touristic branch

Regarding employment per age and touristic branch in Crete in 2024, employees 15-24 years old in the accommodation branch numbered 3.225 comprising 14,3% of the regional employment in that sector, which was the highest percentage for the sector during the 2014-2024 period. Employees aged 25-34 years numbered 4.521 comprising 20% of the regional employment in that sector; employees aged 35-44 years numbered 5.425 comprising 24% of the regional employment in that sector; employees aged 45-54 years numbered 7.070 comprising 31,3% of the regional employment in that sector; finally, employees aged 55 years and over numbered 2.365 comprising 10,5% of the regional employment in that sector. Throughout the 2014-2024 period the percentage of employees aged 15-24 years varied from

1,5% in 2021 to 14,3% in 2024; the percentage of employees aged 25-34 years varied from 17,3% in 2022 to 29,2% in 2020; the percentage of employees aged 35-44 years varied from 23,7% in 2022 to 36,4% in 2015; the percentage of employees aged 45-54 years varied from 20,9% in 2017 to 34,2% in 2022; and the percentage of employees aged 55 years and over varied from 7% in 2014 to 19,8% in 2022.

Concerning catering services in Crete in 2024, employees aged 15-24 years numbered 2.330 comprising 9,9% of the regional employment in that sector, while employees aged 25-34 years numbered 5.863 comprising 24,8% of the regional employment in that sector, which was the lowest percentage of this sector during the 2014-2024 period. Employees aged 35-44 years numbered 6.573 comprising 27,8% of the regional employment in that sector, while employees aged 45-54 years numbered 5.384 comprising 22,8% of the regional employment in that sector, whereas employees aged 55 years and over numbered 3.466 comprising 14,7% of the regional employment in that sector. Throughout the 2014-2024 period the percentage of employees aged 15-24 years varied from 6,9% in 2021 to 16,5% in 2018; the percentage of employees aged 25-34 years varied from 24,8% in 2024 to 34,6% in 2018; the percentage of employees aged 35-44 years varied from 16,1% in 2020 to 28,5% in 2015; the percentage of employees aged 45-54 years varied from 16,5% in 2019 to 24,1% in 2016; and the percentage of employees aged 55 years and over varied from 9,5% in 2018 to 18,2% in 2021.

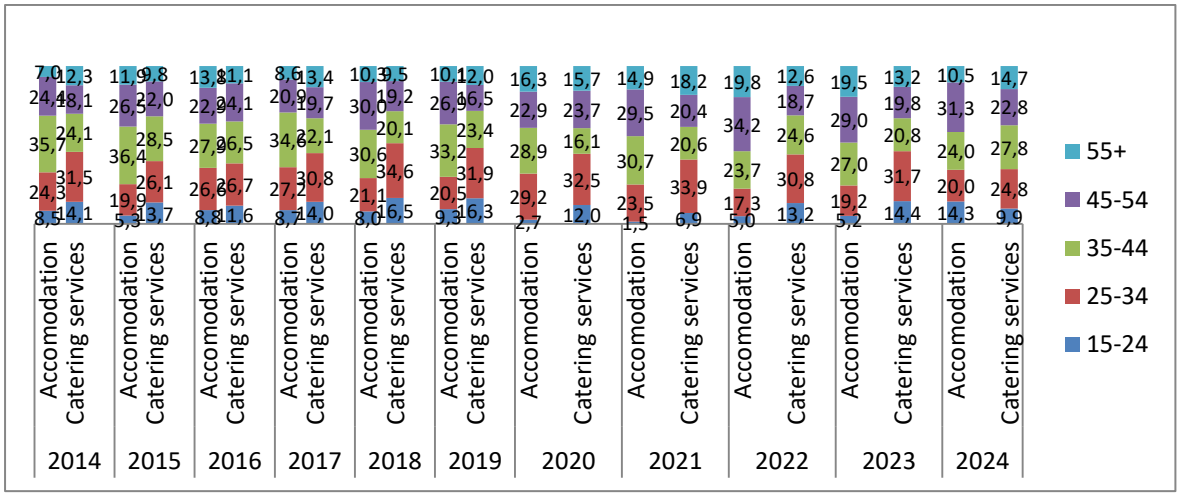


Figure 1.27 Distribution per age of employment in the touristic branches of Crete during the period 2014-2024
Sources: Hellenic Statistical Authority, Labor Force Survey, 2025; Institute of Greek Tourism Confederation, 2025

CHAPTER 2

TOURISM ACCOMMODATIONS

2.1 Hotel accommodation units in Crete and Greece

Hotel units in Greece reached 10.118 in number in 2025. In 1996, hotel units numbered 7.477 and there was a continuous increase of 30% in units till 2010 with 9.732. After that year unit numbers somehow stabilized with a small increase of 4% till 2025. During the 1996-2025 period the increase in hotel units reached 35%. In Crete, hotel units reached 1.643 in number in 2025. In 1996, hotel units numbered 1.266 and there was an increase of 18% in units till 2004 with 1.492. After that year, the increase was smaller at 11% till 2025. During the 1996-2025 period, the increase in hotel units reached 31%, while Crete's hotel units comprised 16% of the hotel units in Greece.

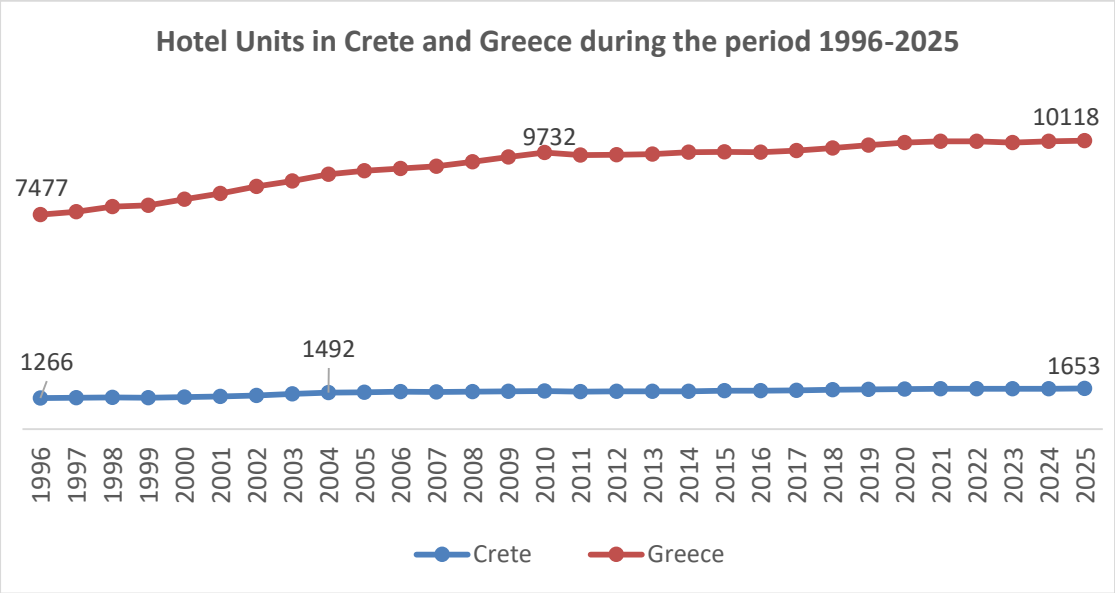


Figure 2.1 Hotel units in Crete and Greece during the period 1996-2025
Source: Hellenic Chamber of Hotels, 2026

2.1.1 Hotel accommodation rooms in Crete and Greece

Hotel rooms in Crete reached 450.565 in number in 2025. In 1996 hotel rooms numbered 289.446 and there was a continuous increase of 37% in room numbers till 2010 with 397.660. After that year room numbers continued to rise with a total increase of 13,3% till 2025. During the 1996-2025 period the increase in hotel room numbers reached 56%. This increase is higher than the increase in hotel units in Greece. In Crete, hotel room numbers reached

100.736 in number in 2025. In 1996 there were 56.681 hotel rooms with an increase of 32% in room numbers till 2004 with 74.781. After that year, the total increase was almost the same at 35% till 2025. During the 1996-2025 period the increase in hotel room numbers reached 78%. This increase is much higher than the increase in hotel units in Crete. Crete's hotel rooms comprised 22% of hotel room numbers in Greece.

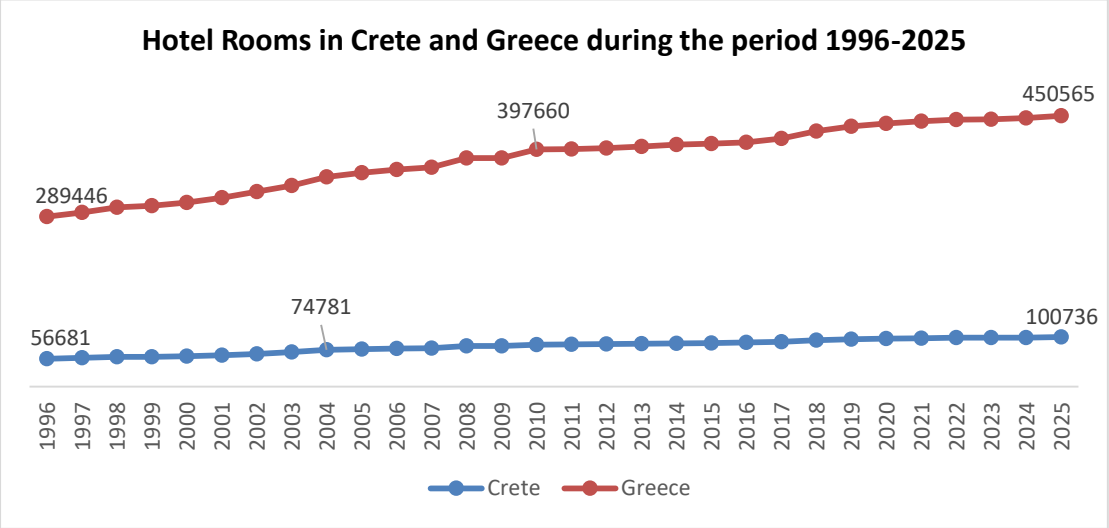


Figure 2.2 Hotel rooms in Crete and Greece during the period 1996-2025
Source: Hellenic Chamber of Hotels, 2026

2.1.2 Hotel accommodation beds in Crete and Greece

Hotel beds in Crete totaled 902.328 in 2025. In 1996 hotel beds numbered 548.785 and there was a continuous increase to 39% in beds till 2010 with 763.407. After that year bed numbers were still rising with a total increase of 18% till 2025. During the 1996-2025 period the increase in hotel bed numbers reached 64%. This increase is higher than the increase in the number of hotel rooms and units in Greece. In Crete, hotel bed numbers totaled 198.559 in 2025. In 1996 there were 106.703 hotel beds with an increase of 32% in bed numbers till 2004 with 140.502. After that year the total increase was a little higher at 41% till 2025. During the 1996-2025 period, the increase in hotel bed numbers reached 86%. This increase is also higher than the increase in the number of hotel rooms and units in Crete. Crete's hotel beds comprised 22% of hotel beds in Greece.

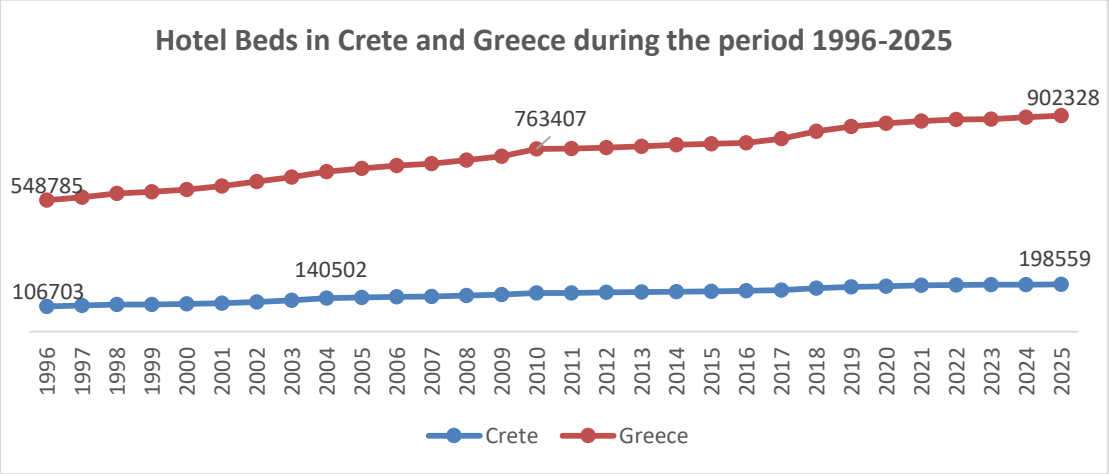


Figure 2.3 Hotel beds in Crete and Greece during the period 1996-2025
Source: Hellenic Chamber of Hotels, 2026

2.1.3 Hotel accommodation by order of magnitude and size in Crete and Greece

Grouping hotels by order of magnitude (how big hotels are) in 2025 in Crete, there were 472 family (1-20 rooms) hotel units with 6.035 rooms and 12.206 beds; 627 small (21-50 rooms) hotel units with 20.663 rooms and 39.393 beds; 302 medium (51-100 rooms) hotel units with 21.026 rooms and 39.903 beds; and 252 big (more than 100 rooms) hotel units with 53.012 rooms and 107.057 beds. 67% of the hotel units of Crete have capacity till 50 rooms and 15% more than 1000 rooms. In Greece, there were 4.094 family (1-20 rooms) hotel units with 52.742 rooms and 107.762 beds; 3.869 small (21-50 rooms) hotel units with 124.137 rooms and 244.306 beds; 1.272 medium (51-100 rooms) hotel units with 88.139 rooms and 170.688 beds; and 883 big (more than 100 rooms) hotel units with 185.547 rooms and 379.572 beds. 29% of the big hotels in Greece are located in Crete.

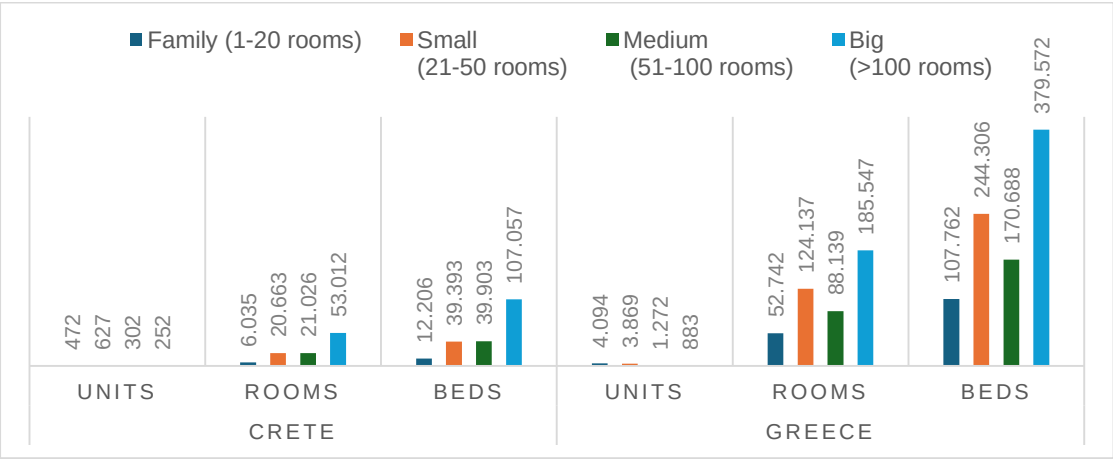
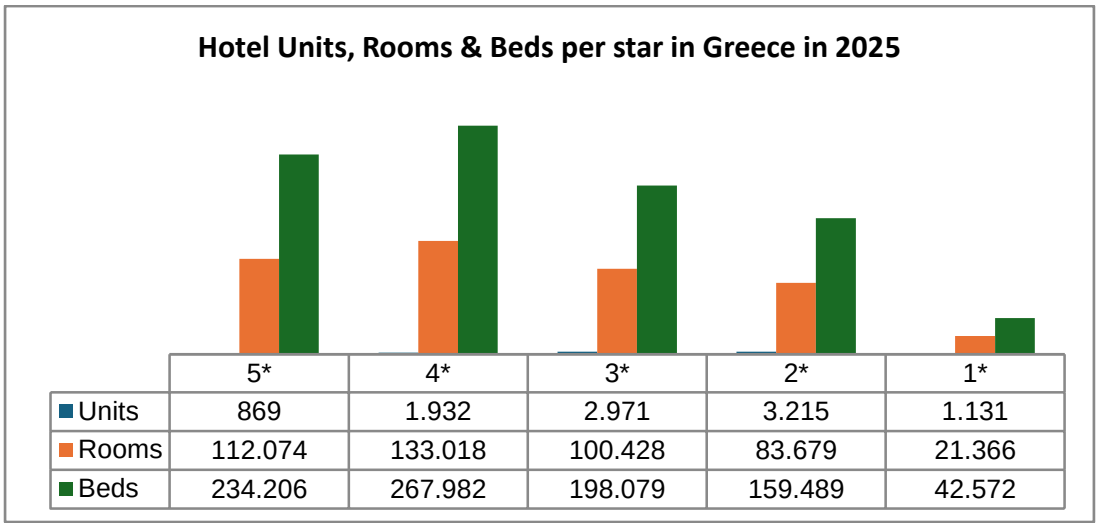


Figure 2.4 Hotel accommodation by order of magnitude and size in Crete and Greece in 2025
Source: Hellenic Chamber of Hotels, 2026

The average hotel size (rooms/units) in Crete in 2025 was 61, while in Greece it was 45, meaning that hotel units in Crete have more rooms than hotel units in Greece; the beds/units ratio in Crete was 120 while in Greece it was 86, meaning again that hotel units in Crete also have more beds than hotel units in Greece.

2.1.4 Hotel accommodation by stars in Crete and Greece

Grouping hotels by stars in 2025, in Greece there were 869 five-star (5*) hotel units with 112.074 rooms and 234.206 beds; 1.932 four-star (4*) hotel units with 133.018 rooms and 267.982 beds; 2.971 three-star (3*) hotel units with 100.428 rooms and 198.079 beds; 3.215 two- star (2*) hotel units with 83.679 rooms and 159.489 beds; and 1.131 one-star (1*) hotel units with 21.366 rooms and 42.572 beds.



	5*	4*	3*	2*	1*
Units	869	1.932	2.971	3.215	1.131
Rooms	112.074	133.018	100.428	83.679	21.366
Beds	234.206	267.982	198.079	159.489	42.572

Figure 2.5 Hotel units, rooms and beds per star in Greece in 2025
Source: Hellenic Chamber of Hotels, 2026

Compared with the previous years, for 5-star hotels in Greece, there was an increase of 4,1% units compared to 2024 and 1302% compared to 1996; hotel room numbers increased by 2,2% compared to 2024 and 639% compared to 1996, whereas hotel bed numbers increased by 1,3% compared to 2024 and 698% compared to 1996.

For 4-star hotels in Greece, there was an increase of 1,8% in hotel units compared to 2024 and 195% compared to 1996; hotel room numbers increased by 1,8% compared to 2024 and 91% compared to 1996, whereas hotel bed numbers decreased by 1,1% compared to 2024 and increased 96% compared to 1996.

For 3-star hotels in Greece, there was a marginal decrease of 0,1% at hotel units compared to 2024 and 118% compared to 1996; hotel room numbers decreased by 0,6% compared to 2024 and increased by 39% compared to 1996, whereas hotel bed numbers decreased by 4,9% compared to 2024 and increased by 38% compared to 1996.

For 2-star hotels in Greece, there was a decrease of 1,1% in hotel units compared to 2024 and 14% compared to 1996; hotel room numbers decreased by 0,6% compared to 2024 and 21% compared to 1996, while hotel bed numbers decreased by 6,1% compared to 2024 and 24% compared to 1996.

For 1-star hotels in Greece, there was a decrease of 1,4% in hotel units compared to 2024 and 31% compared to 1996; hotel room numbers decreased by 1,8% compared to 2024 and 21% compared to 1996, while hotel bed numbers decreased by 5% compared to 2024 and 21% compared to 1996.

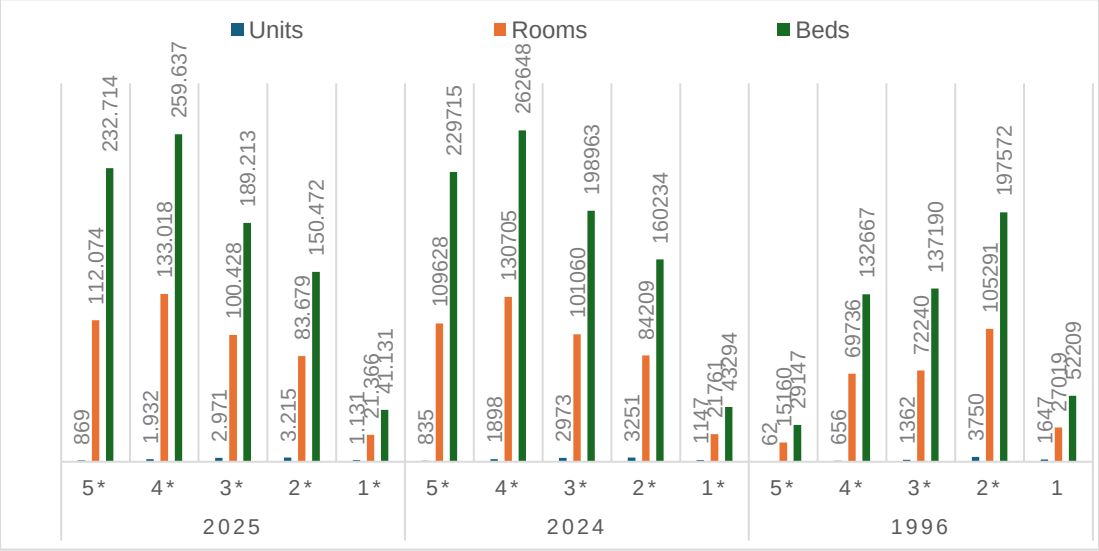
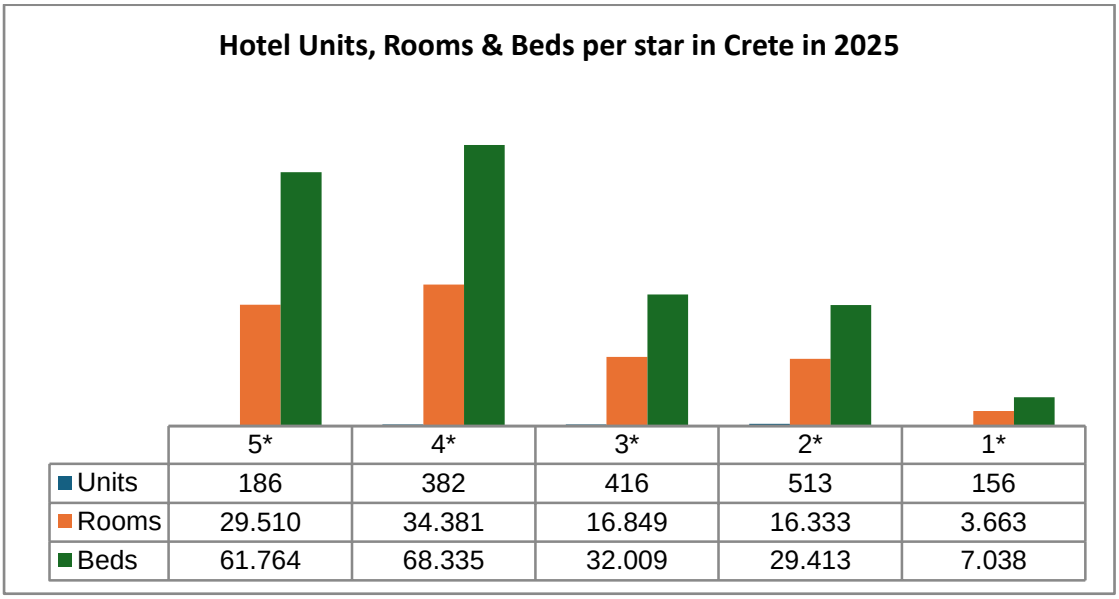


Figure 2.6 Hotel units, rooms and beds per star in Greece in 2025, 2024, 1996
Source: Hellenic Chamber of Hotels, 2026

In Crete in 2025, there were 186 five-star hotel units with 29.510 rooms and 61.764 beds; 382 four-star hotel units, with 34.381 rooms and 68.335 beds; 416 three-star hotel units with 16.849 rooms and 32.009 beds; 513 two-star hotel units with 16.333 rooms and 29.413 beds; and 156 one-star hotel units with 3.663 rooms and 7.038 beds.



	5*	4*	3*	2*	1*
Units	186	382	416	513	156
Rooms	29.510	34.381	16.849	16.333	3.663
Beds	61.764	68.335	32.009	29.413	7.038

Figure 2.7 Hotel units, rooms and beds per star in Crete in 2025
Source: Hellenic Chamber of Hotels, 2026

The 5-star hotel units of Crete constitute 21,4% of the 5-star hotel units in Greece; hotel room numbers in Crete constitute 26,3% of the hotel rooms in Greece, with a similar percentage for hotel bed numbers with 26,4%. The 4-star hotel units of Crete constitute 19,8% of the 4-star hotel units in Greece; hotel room numbers in Crete constitute 25,9% of the hotel rooms in Greece with a similar percentage for hotel bed numbers with 25,5%. The 3-star hotel units of Crete constitute 14% of the 3-star hotel units in Greece; hotel room numbers in Crete constitute 16,8% of the hotel rooms in Greece with a similar percentage for hotel bed numbers with 16,2%. The 2-star hotel units of Crete constitute 16% of the 2-star hotel units in Greece; hotel room numbers in Crete constitute 19,5% of the hotel rooms in Greece with a similar percentage of hotel bed numbers with 18,4%. The 1-star hotel units of Crete constitute 13,8% of the 1-star hotel units in Greece; hotel room numbers of Crete constitute 17,1% of the hotel room numbers in Greece with a similar percentage of hotel bed numbers with 16,5%.

Compared with the previous years, concerning 5-star hotels in Crete, there was an increase of 5,1% in hotel units compared to 2024 and 1063% compared to 1996; hotel rooms increased by 2,5% compared to 2024 and 693% compared to 1996, while hotel beds increased by 1,4% compared to 2024 and 752% compared to 1996.

Concerning 4-star hotels in Crete, there was an increase of 2,7% in hotel units compared to 2024 and 150% compared to 1996; hotel rooms increased by 3,2% compared to 2024 and 91% compared to 1996, whereas hotel beds increased by 3,1% compared to 2024 and 101% compared to 1996.

Concerning 3-star hotels in Crete, there was a decrease of 0,7% in hotel units compared to 2024, but there was an increase of 62% compared to 1996; hotel rooms decreased by 2,5% compared to 2024 and increased by 28% compared to 1996, whereas hotel beds decreased by 2,6% compared to 2024 and increased by 27% compared to 1996.

Concerning 2-star hotels in Crete, there was a decrease of 0,8% in hotel units compared to 2024 and 24% compared to 1996; hotel rooms decreased by 1,2% compared to 2024 and 15% compared to 1996, whereas hotel beds decreased by 1,2% compared to 2024 and 17% compared to 1996.

Concerning 1-star hotels in Crete, there was a decrease of 1,3% in hotel units compared to 2024 and 7,1% compared to 1996; hotel rooms decreased marginally by 0,3% compared to 2024 and increased by 45% compared to 1996, whereas hotel beds decreased by 0,5% compared to 2024 and increased by 48% compared to 1996.

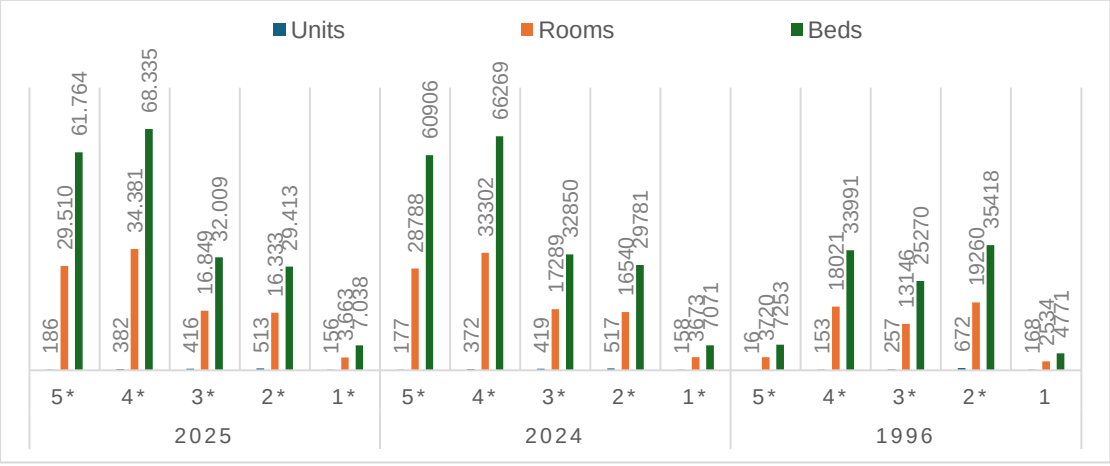


Figure 2.8 Hotel units, rooms and beds per star in Crete in 2025, 2024, 1996
Source: Hellenic Chamber of Hotels, 2026

The average hotel size (rooms/units) in Crete in 2025 was 61 rooms/unit; at 5-star hotels it was 159 rooms/unit, at 4-star hotels it was 90 rooms/unit, at 3-star hotels it was 41 rooms/unit, at 2-star hotels it was 32 rooms/unit and at 1-star hotels it was 23 rooms/unit. The

average hotel size (rooms/units) in Greece in 2025 was 45 rooms/unit: at 5-star hotels it was 129 rooms/unit, at 4-star hotels it was 69 rooms/unit, at 3-star hotels it was 34 rooms/unit, at 2-star hotels it was 26 rooms/unit and at 1-star hotels it was 19 rooms/unit. Thus, the average hotel size in Crete is higher than the average hotel size in Greece in total and per star category.

2.1.5 Hotel accommodation of 5 star hotels in Crete and Greece

Concerning the luxurious 5-star hotels in Greece, there is a continuous increase in hotel units from 62 in 1996 to 312 in 2010 with an increase of 403%, and from 312 in 2010 to 869 in 2025 with an increase of 179%. The total increase from 1996 to 2025 is 1302%. In Crete, hotel units numbered 16 in 1996, after which there was a stability with 21 5-star hotel units during the 1999-2003 period and then it started increasing from 2003 till 2010 by 262%. From 2010 till 2014, the increase was 133% and for the 1996-2025 period the total increase was 1063%.

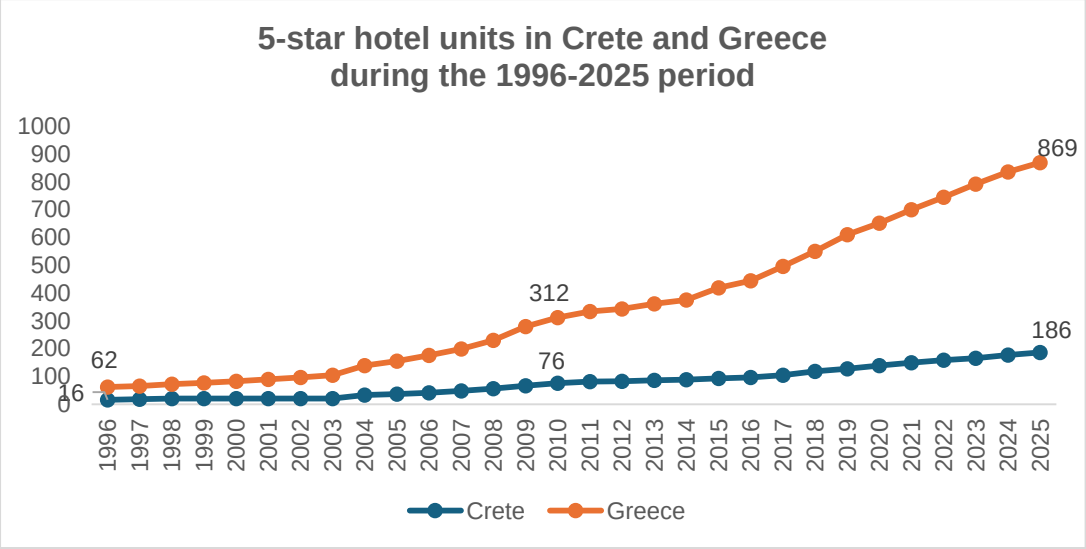


Figure 2.9 5-star hotel units in Crete and Greece during the period 1996-2025
Source: Hellenic Chamber of Hotels, 2026

2.1.6 Hotel accommodation rooms in the Regional Units of Crete

Looking at the Regional Units of Crete during the period 2005-2025, the Regional Unit of Chania recorded 599 hotel units in 2025 with an increase of 27% compared to 510 units in 2005; the Regional Unit of Heraklion recorded 510 units in 2025, the same number as in

2005; the Regional Unit of Rethymnon recorded 341 units in 2025 with an increase of 18% compared to 288 units in 2005; while the Regional Unit of Lasithi recorded 203 units in 2025 with a decrease of 14% compared to 237 units in 2005.

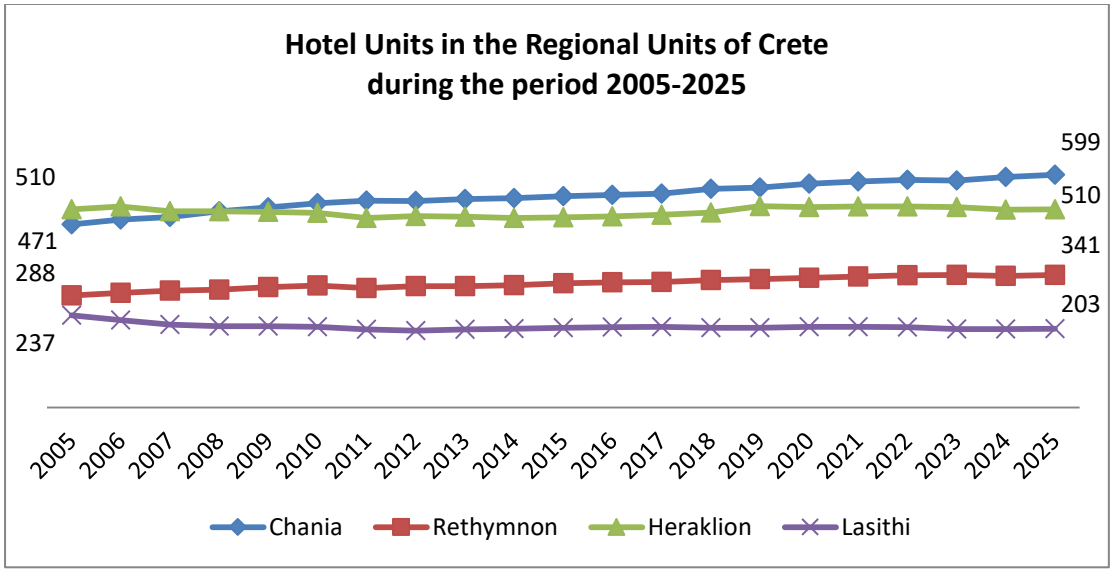


Figure 2.10 Hotel units in the Regional Units of Crete during the period 2005-2025
Source: Hellenic Chamber of Hotels, 2026

2.1.7 Hotel accommodation rooms in the Regional Units of Crete

Regarding hotel rooms in the Regional Units of Crete, the Regional Unit of Heraklion recorded 40.444 rooms in 2025 with an increase of 26% compared to 32.017 rooms in 2005; the Regional Unit of Chania recorded 27.854 rooms in 2025 with an increase of 56% compared to 17.804 rooms in 2005; the Regional Unit of Rethymnon recorded 18.417 rooms in 2025 with an increase of 23% compared to 15.015 rooms in 2005; while the Regional Unit of Lasithi recorded 14.021 rooms in 2025 with an increase of 23% compared to 11.450 rooms in 2005.

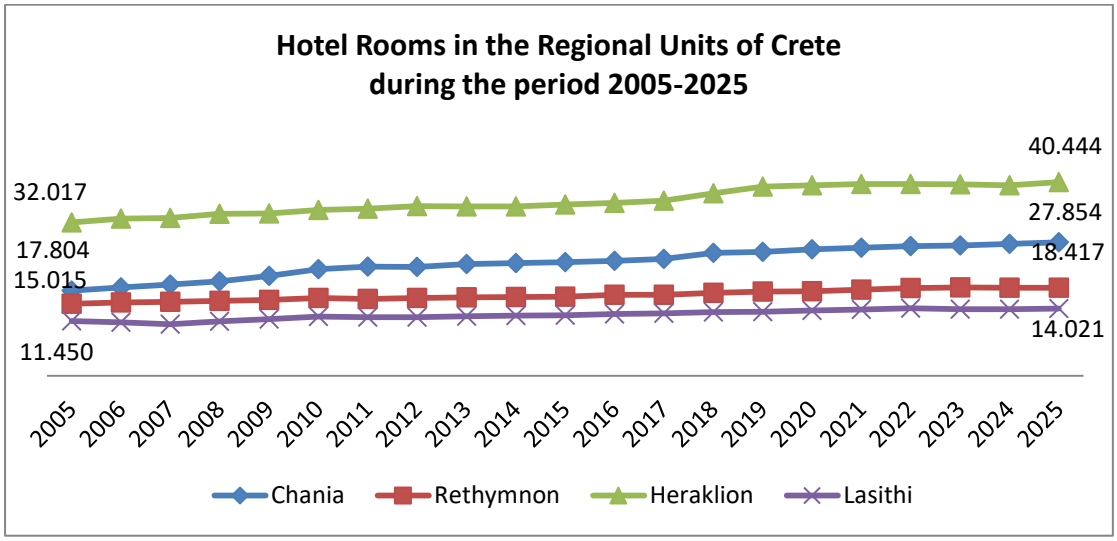


Figure 2.11 Hotel rooms in the Regional Units of Crete during the period 2005-2025
Source: Hellenic Chamber of Hotels, 2026

2.1.8 Hotel accommodation beds in the Regional Units of Crete

As far as the hotel bed numbers are concerned in the Regional Units of Crete, the Regional Unit of Heraklion recorded 81.304 beds in 2025 with an increase of 33% compared to 61.031 beds in 2005; the Regional Unit of Chania recorded 52.738 beds in 2025 with an increase of 62% compared to 32.547 beds in 2005; the Regional Unit of Rethymnon recorded 36.428 beds in 2025 with an increase of 29% compared to 28.288 beds in 2005; while the Regional Unit of Lasithi recorded 28.089 beds in 2025 with an increase of 30% compared to 21.614 beds in 2005.

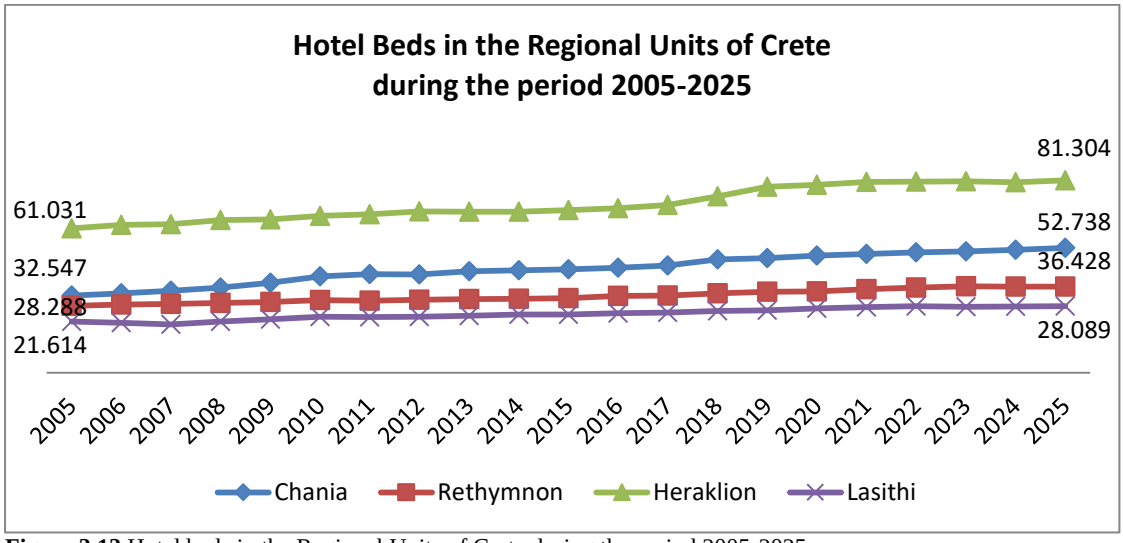


Figure 2.12 Hotel beds in the Regional Units of Crete during the period 2005-2025
Source: Hellenic Chamber of Hotels, 2026

The average hotel size (rooms/units) in the Regional Unit of Heraklion in 2025 it was 79 rooms/unit, in the Regional Unit of Lasithi it was 69 rooms/unit, in the Regional Unit of Rethymnon it was 54 rooms/unit and in the Regional Unit of Chania it was 47 rooms/unit. Concerning the beds/units ratio, the Regional Unit of Heraklion also has the highest with 159; Lasithi follows with 138, then Rethymnon with 107 and finally Chania with 88 beds per hotel unit.

2.1.9 Hotel accommodation per star in the Regional Units of Crete

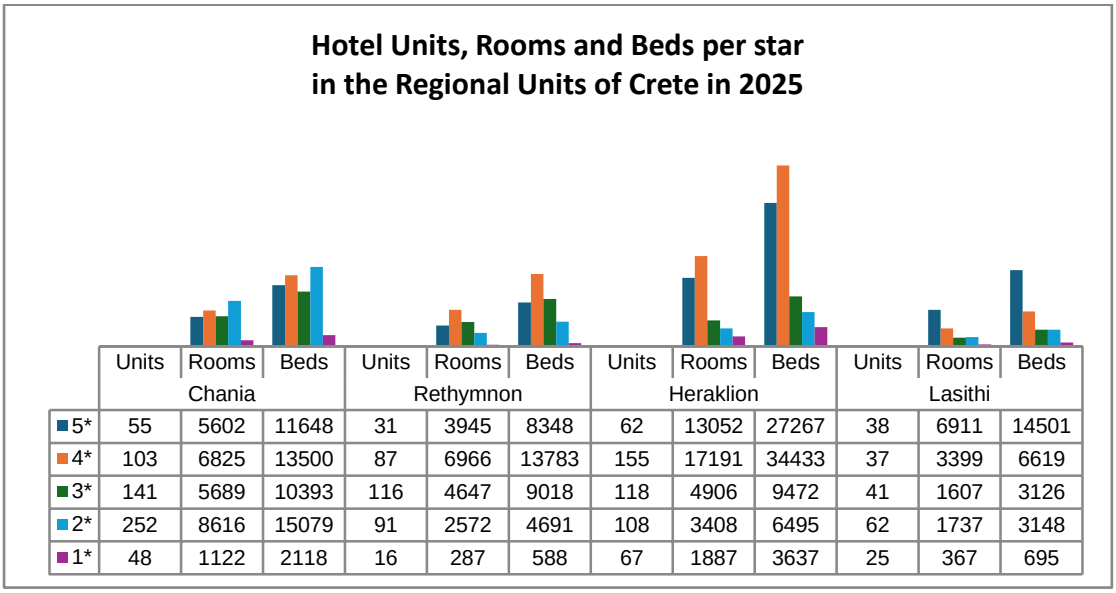
In 2025, in the Regional Unit of Chania there were 55 five-star hotel units with 5.602 rooms and 11.648 beds; 103 four-star hotel units, with 6.825 rooms and 13.500 beds; 141 three-star hotel units with 5.689 rooms and 10.393 beds; 252 two-star hotel units with 8.616 rooms and 15.079 beds; and 48 one-star hotel units with 1.122 rooms and 2.118 beds.

In the Regional Unit of Rethymnon there were 31 five-star hotel units with 3.945 rooms and 8.348 beds; 87 four-star hotel units, with 6.966 rooms and 13.783 beds; 116 three-star hotel units with 4.647 rooms and 9.018 beds; 914 two-star hotel units with 2.572 rooms and 4.691 beds; and 16 one-star (1*) hotel units with 287 rooms and 588 beds.

In the Regional Unit of Heraklion there were 62 five-star hotel units with 13.052 rooms and 27.267 beds; 155 four-star hotel units, with 17.191 rooms and 34.433 beds; 118 three-star hotel units with 4.906 rooms and 9.472 beds; 108 two-star hotel units with 3.408 rooms and 6.495 beds; and 67 one-star hotel units with 1.887 rooms and 3.637 beds.

In the Regional Unit of Lasithi there were 38 five-star hotel units with 6.911 rooms and 14.501 beds; 37 four-star (4*) hotel units, with 3.399 rooms and 6.619 bed; 41 three-star hotel units with 1.607 rooms and 3.126 beds; 62 two-star hotel units with 1.737 rooms and 3.148 beds; and 25 one-star hotel units with 367 rooms and 695 beds.

The most luxurious hotel units (5*) in Crete are located in Heraklion with 33%, followed by Chania with 30%, Lasithi with 20% and Rethymnon with 17%. Likewise, the less luxurious hotel units (1*) are also located in Heraklion with 43%, followed by Chania with 31%, Lasithi with 16% and Rethymnon with 10%.



	Chania			Rethymnon			Heraklion			Lasithi		
	Units	Rooms	Beds	Units	Rooms	Beds	Units	Rooms	Beds	Units	Rooms	Beds
5*	55	5602	11648	31	3945	8348	62	13052	27267	38	6911	14501
4*	103	6825	13500	87	6966	13783	155	17191	34433	37	3399	6619
3*	141	5689	10393	116	4647	9018	118	4906	9472	41	1607	3126
2*	252	8616	15079	91	2572	4691	108	3408	6495	62	1737	3148
1*	48	1122	2118	16	287	588	67	1887	3637	25	367	695

Figure 2.13 Hotel units, rooms and beds per star in the Regional Units of Crete in 2025
Source: Hellenic Chamber of Hotels, 2026

2.1.10 Hotel accommodation per size in the Regional Units of Crete

The average hotel size (rooms/units) in the Regional Unit of Chania was 102 rooms/unit at 5-star hotels; 66 rooms/unit at 4-star hotels; 40 rooms/unit at 3-star hotels; 34 rooms/unit at 2-star hotels; and 23 rooms/unit at 1-star hotels.

The average hotel size (rooms/units) in the Regional Unit of Rethymnon was 127 rooms/unit at 5-star hotels; 80 rooms/unit at 4-star hotels; 40 rooms/unit at 3-star hotels; 28 rooms/unit at 2-star hotels; and 18 rooms/unit at 1-star hotels.

The average hotel size (rooms/units) in the Regional Unit of Heraklion was 211 rooms/unit at 5-star hotels; 111 rooms/unit at 4-star hotels; 42 rooms/unit at 3-star hotels; 32 rooms/unit at 2-star hotels; and 28 rooms/unit at 1-star hotels.

The average hotel size (rooms/units) in the Regional Unit of Lasithi was 182 rooms/unit at 5-star hotels; 92 rooms/unit at 4-star hotels; 39 rooms/unit at 3-star hotels; 28 rooms/unit at 2-star hotels; and 15 rooms/unit at 1-star hotel.

Thus, the average hotel size is bigger in the Regional Unit of Heraklion concerning 5-, 4- 3- and 1-star hotels, while the Regional Unit of Chania has the biggest average size regarding 2-star hotels.

Compared with the previous years, at 5-star hotels in Chania, there was an increase of 7,8% in hotel units compared to 2024 and 1275% compared to 2005, hotel room numbers increased by 3,9% compared to 2024 and 719% compared to 2005, while hotel bed numbers increased by 5,1% compared to 2024 and 717% compared to 2005.

At 4-star hotels in Chania, there was an increase of 1% in hotel units compared to 2024 and 255% compared to 2005, hotel room numbers increased by 1,3% compared to 2024 and 205% compared to 2005, while hotel bed numbers increased by 1,6% compared to 2024 and 210% compared to 2005.

At 3-star hotels in Chania, there was no change in hotel units compared to 2024, but there was an increase of 48% compared to 2005. Hotel room numbers marginally increased (0,1%) compared to 2024 but increased by 42% compared to 2005 and hotel bed numbers marginally increased (0,2%) as well compared to 2024 but increased by 40% compared to 2005.

At 2-star hotels in Chania, there was a marginal increase of 0,4% in hotel units compared to 2024 but decreased by 11% compared to 2005. Hotel room numbers marginally increased (0,2%) compared to 2024 but decreased by 10% compared to 2005, while hotel bed numbers marginally increased (0,2%) mpared to 2024 but decreased by 11% compared to 2005.

At 1-star hotels in Chania, there was not any change in hotel units, rooms and beds compared to 2024. There was a decrease in hotel units by 19%, in hotel rooms by 14% and in hotel beds by 12% compared to 2005.

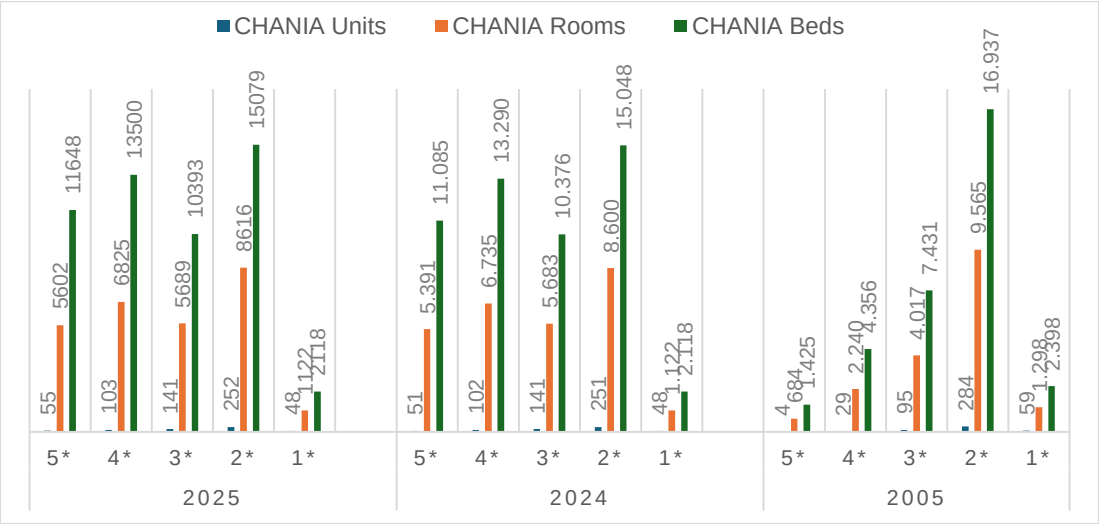


Figure 2.14 Hotel units, rooms and beds per star in the Regional Unit of Chania in 2025, 2024, 2005
Source: Hellenic Chamber of Hotels, 2026

Compared with the previous years, at 5-star hotels in Rethymnon, there was an increase of 6,9% in hotel units compared to 2024 and 417% compared to 2005, hotel room numbers increased by 2,7% compared to 2024 and 131% compared to 2005, while hotel bed numbers increased by 2,3% compared to 2024 and 154% compared to 2005.

At 4-star hotels in Rethymnon, there was an increase of 4,8% in hotel units compared to 2024 and 181% compared to 2005, hotel room numbers increased by 6,8% compared to 2024 and 75% compared to 2005, while hotel bed numbers increased by 6,2% compared to 2024 and 78% compared to 2005.

At 3-star hotels in Rethymnon, there was a marginal decrease of 0,9% in hotel units compared to 2024 but increased by 71% compared to 2005, hotel room numbers decreased by 6,9% compared to 2024 but increased by 18% compared to 2005, while hotel bed numbers decreased by 6,9% compared to 2024 but increased by 22% compared to 2005.

At 2-star hotels in Rethymnon, there was a decrease of 3,2% in hotel units compared to 2024 and by 42% compared to 2005, hotel room numbers decreased by 5,3% compared to 2024 and by 48% compared to 2005, while hotel bed numbers decreased by 5% compared to 2024 and by 48% compared to 2005.

At 1-star hotels in Rethymnon, there was not any change in hotel units, rooms and beds compared to 2024. There was a decrease in hotel units by 39%, in hotel rooms by 41% and in hotel beds by 36% compared to 2005.

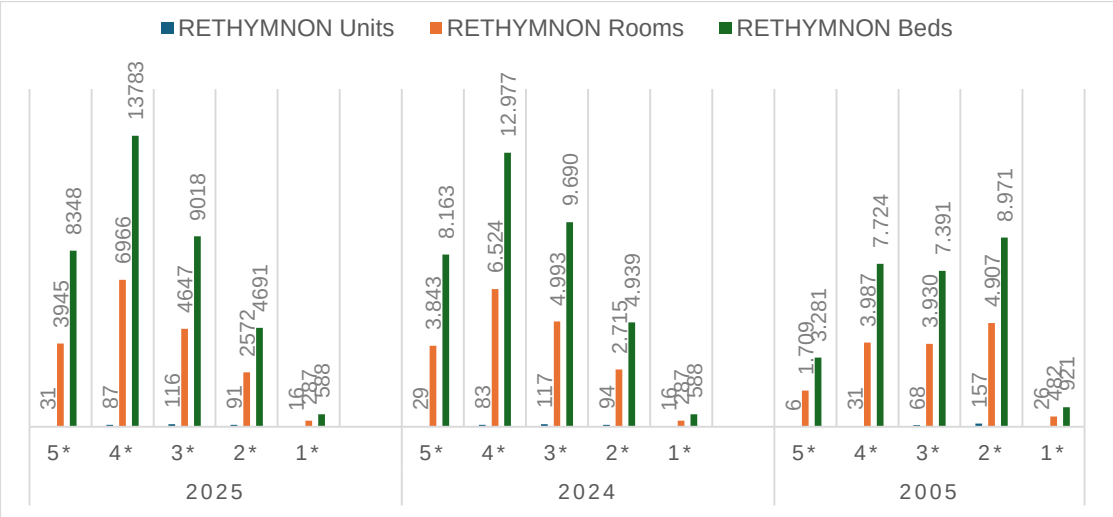


Figure 2.15 Hotel units, rooms and beds per star in the Regional Unit of Rethymnon in 2025, 2024, 2005
Source: Hellenic Chamber of Hotels, 2026

Compared with the previous years, at 5-star hotels in Heraklion, there was an increase of 1,6% in hotel units compared to 2024 and 343% compared to 2005. Hotel room numbers increased by 2,5% compared to 2024 and 197% compared to 2005, while hotel bed numbers marginally decreased by 0,2% compared to 2024 and 208% compared to 2005.

At 4-star hotels in Heraklion, there was an increase of 3,3% of the hotel units compared to 2024 and an increase of 41% compared to 2005. The hotel rooms were increased by 3,3% compared to 2024 and increased by 34% compared to 2005. The hotel beds were increased by 3,3% compared to 2024 and increased by 42% compared to 2005.

At 3-star hotels in Heraklion, there was a decrease of 1,7% in hotel units compared to 2024 and an increase of 27% compared to 2005. Hotel room numbers decreased by 2% compared to 2024 and 9,9% compared to 2005, while hotel bed numbers also decreased by 1,9% compared to 2024 and 8,7% compared to 2005.

At 2-star hotels in Heraklion, there was a decrease of 1,8% in hotel units compared to 2024 and 43% compared to 2005. Hotel room numbers decreased by 2,3% compared to 2024 and 46% compared to 2005, while hotel beds decreased by 2,3% compared to 2024 and 46% compared to 2005.

At 1-star hotels in Heraklion, there was a decrease of 1,5% in hotel units compared to 2024 and 35% compared to 2005. Hotel room numbers marginally decreased (0,1%) compared to 2024 and 38% compared to 2005, while hotel bed numbers decreased by 0,5% compared to 2024 and 35% compared to 2005.

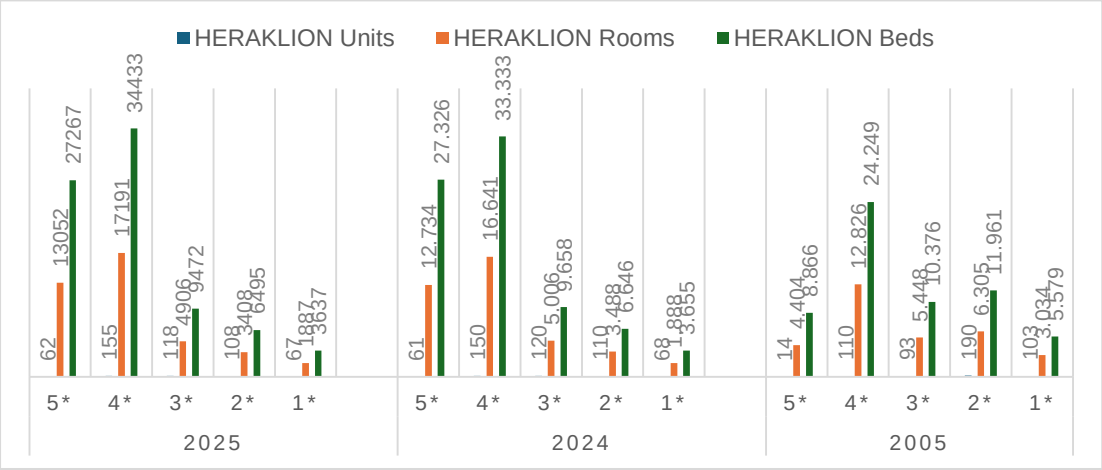


Figure 2.16 Hotel units, rooms and beds per star in the Regional Unit of Heraklion in 2025, 2024, 2005
Source: Hellenic Chamber of Hotels, 2026

Compared with the previous years, at 5-star hotels in Lasithi, there was an increase of 5,6% in hotel units compared to 2024 and 193% compared to 2005. Hotel room numbers increased by 1,3% compared to 2024 and 186% compared to 2005, while hotel beds increased by 1,2% compared to 2024 and 213% compared to 2005.

At 4-star hotels in Lasithi, there was not any change in hotel units compared to 2024 but an increase of 23% compared to 2005. Hotel room numbers marginally decreased (-0,1%) compared to 2024 but increased by 9,2% compared to 2005, while hotel bed numbers decreased by 0,7% compared to 2024 and increased by 10,7% compared to 2005.

At 3-star hotels in Lasithi, there was not any change in hotel units, rooms and beds compared to 2024. There was an increase in hotel units by 5,1%, but a decrease in hotel rooms by 17% and in hotel beds by 16% compared to 2005.

At 2-star hotels in Lasithi, there was not any change in hotel units, rooms and beds compared to 2024. There was a decrease in hotel units by 44%, in hotel rooms by 49% and in hotel beds by the same percentage as well compared to 2005.

At 1-star hotels in Lasithi, there was a decrease of 3,8% in hotel units compared to 2024 and 44% compared to 2005. Hotel room numbers decreased by 2,4% compared to 2024 and 40% compared to 2005, while hotel beds decreased by 2,1% compared to 2024 and 38% compared to 2005.

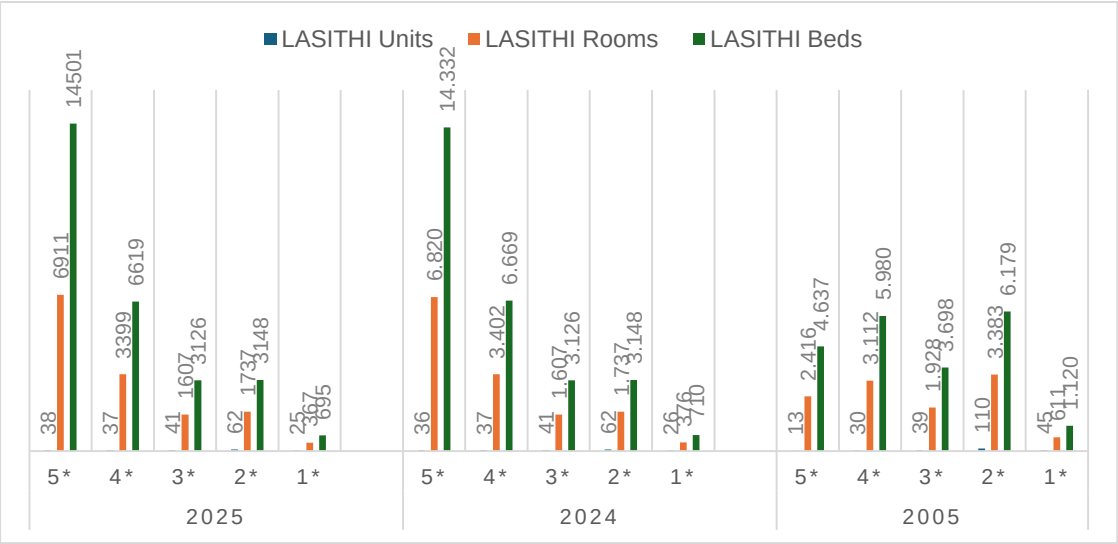


Figure 2.17 Hotel units, rooms and beds per star in the Regional Unit of Lasithi in 2025, 2024, 2005
Source: Hellenic Chamber of Hotels, 2026

2.2 Camping sites in Crete and Greece

Concerning camping facilities in Greece in 2025 there were 290 units, with 1143 houses and 22.669 positions. Compared to the previous year, in 2025 there were 3 units less, 6 houses less and 161 fewer positions. Compared with 2019, in 2025 there were 7 fewer units, 45 houses less and 957 fewer positions.

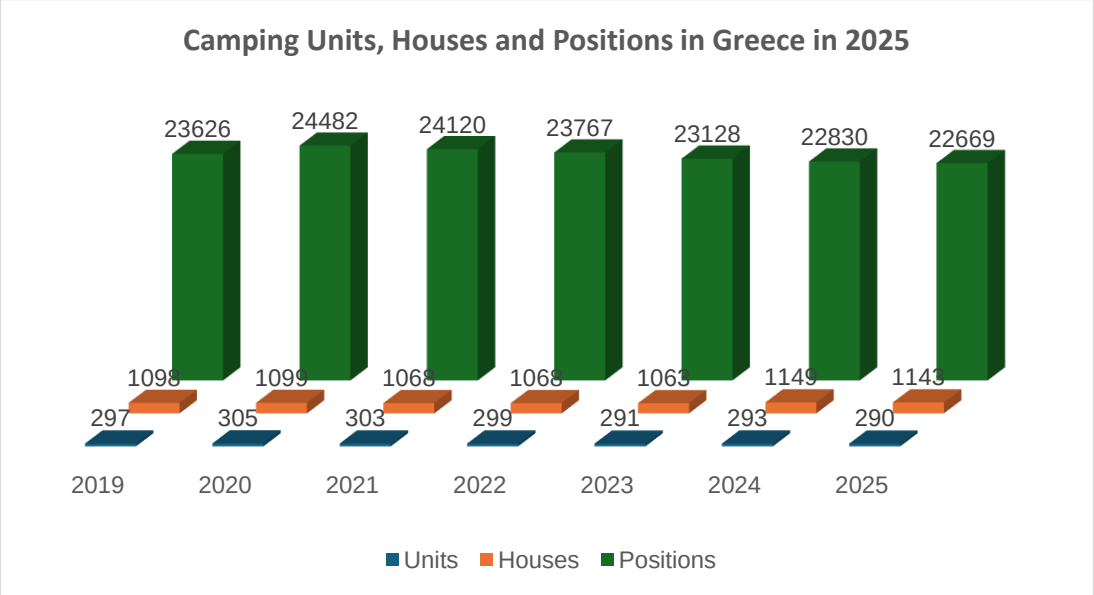


Figure 2.18 Camping units, houses and positions in Greece in 2025
Source: Hellenic Chamber of Hotels, 2026

In Greece in 2025, there were 4 5-star units with 40 houses and 180 positions, 22 4-star units with 211 houses and 2.980 positions, 60 3-star units with 330 houses and 5.049 positions, 187 2-star units with 537 houses and 13.019 positions and 17 1-star units with 25 houses and 1.441 positions. Compared to 2024, in 2025 there were the same 5-star units, beds and positions, 1 4-star unit less with 25 more houses and 9 fewer positions, 2 fewer 3-star units with 7 less houses and 40 fewer positions, 4 fewer 2-star units with 28 houses less and 228 fewer positions; concerning 1-star units, there were 2 more units with 4 more houses and 116 more positions. Compared to 2019, in 2025 there were 3 more 5-star units with 40 more houses and 105 more positions, 3 fewer 4-star units with 56 more houses and 1.319 less positions, 17 more 3-star units with 62 more houses and 1.218 more positions, 25 fewer 2-star units with 112 fewer houses and 717 fewer positions and 1 less 1-star unit with 1 fewer house and 244 fewer positions.

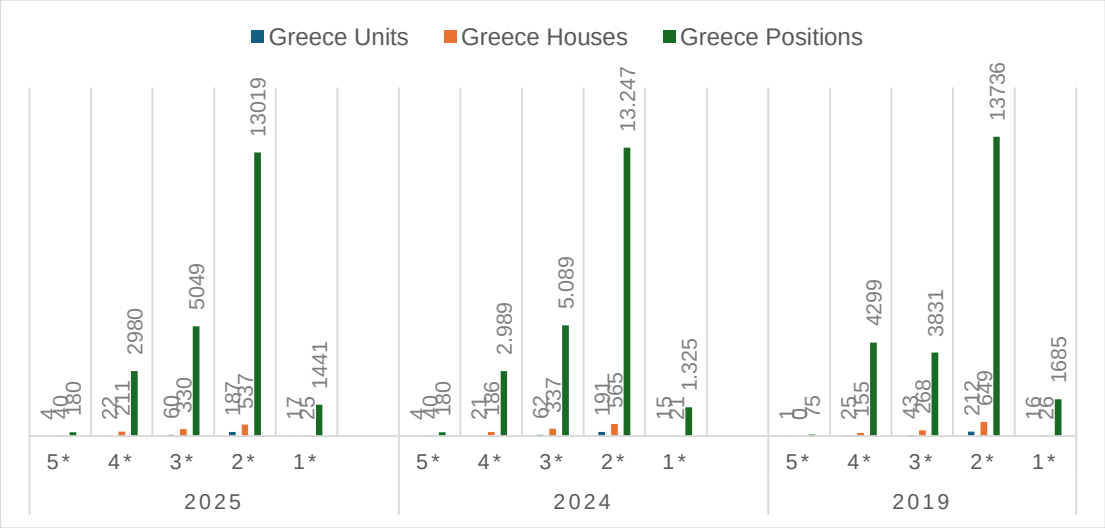


Figure 2.19 Camping units, houses and positions per star in Greece in 2025, 2024, 2019
Source: Hellenic Chamber of Hotels, 2026

In Crete in 2025 there were 14 units, with 739 positions and 1 house. In 2025 there was no change compared to the previous year apart from 1 house more; compared to 2019, in 2025 there are 1 less unit, 13 fewer houses and 21 fewer positions.

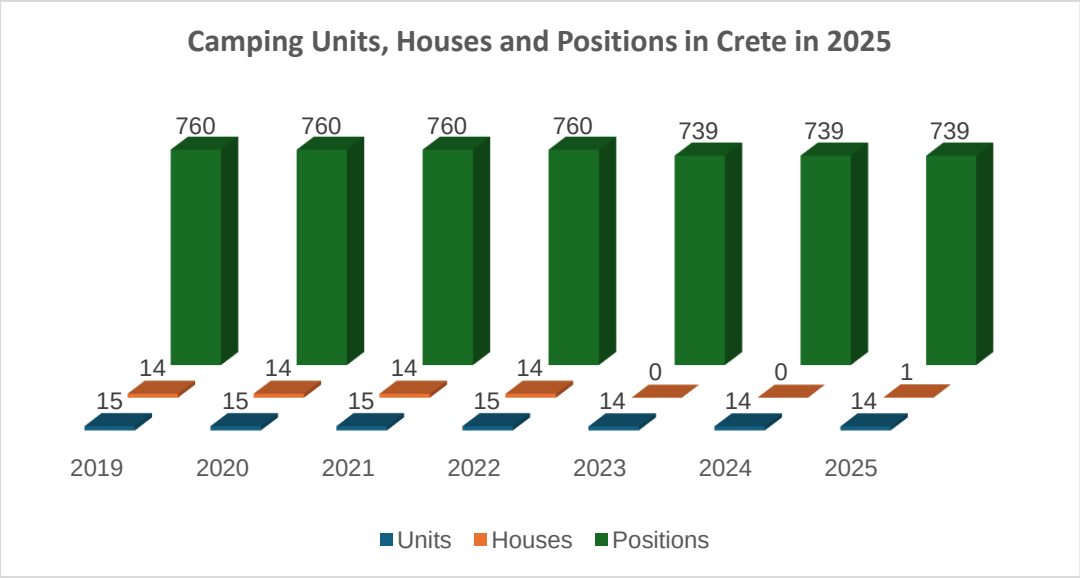


Figure 2.20 Camping units, houses and positions in Crete in 2025
Source: Hellenic Chamber of Hotels, 2026

In Crete, in 2025, there were no 5-star units, 1 4-star unit with 90 positions, 2 3-star units with 1 house and 58 positions, 10 2-star units with 491 positions and a 1-star unit with 100 positions. Compared to 2024, there was no change apart from 1 3-star house; compared to 2019, in 2025 there was no change regarding 4-star units, there was 1 more 3-star unit with 1

house and 40 more positions, and 2 fewer 2-star units with 14 fewer houses and 61 fewer positions but there was no change for 1-star units.

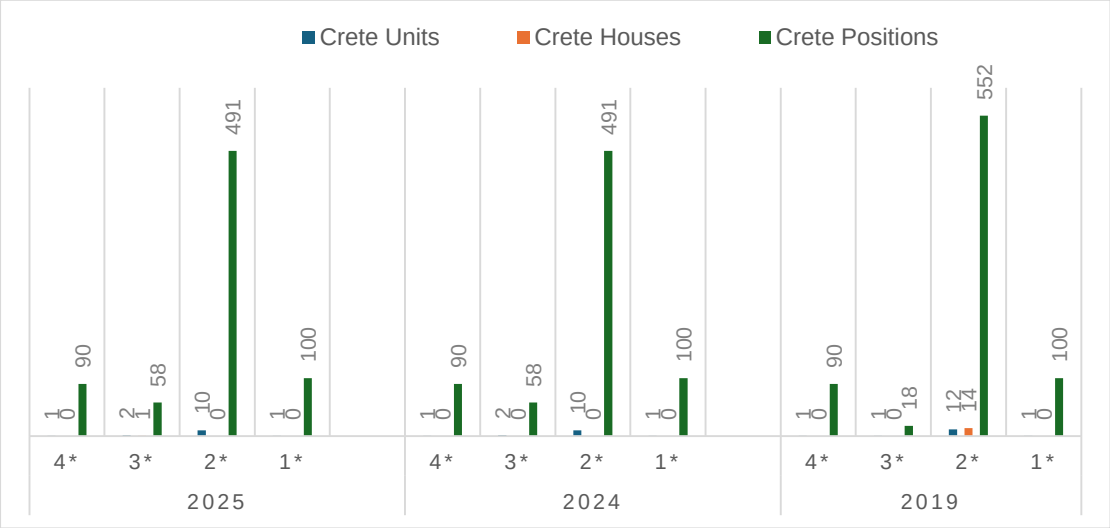


Figure 2.21 Camping units, houses and positions in Crete in 2025, 2024, 2019
Source: Hellenic Chamber of Hotels, 2026

In 2025, Crete comprised 4,8% of the total units of Greece, but with 0,1% of the total houses and 3,3% of the total positions in Greece. Grouping by stars, in 2025, Crete comprised 4,5% of the total 4-star units and 3% of the total 4-star positions in Greece; 3,3% of the total 3-star units, 0,3% of the total houses and 1,1% of the total 3-star positions in Greece; 5,3% of the total 2-star units and 3,8% of the total 2-star positions in Greece and 5,9% of the total 1-star units and 6,9% of the total 1-star positions in Greece.

2.3 Rooms-apartments for rent in Crete

Regarding rooms-apartments for rents in 2025, based on the data of Tourist Business Registry of Greece, Ministry of Tourism, there were 2.021 rental room-apartment units in Crete, with 14.439 rooms and 33.022 beds. Grouped according to the number of keys (K), there were 2 5K rental room-apartment units, with 26 rooms and 62 beds, 39 4K rental room-apartment units with 436 rooms and 989 beds, 667 3K rental room-apartment units with 5.207 rooms and 12.434 beds, 865 2K rental room-apartment units with 6.128 rooms and 13.965 beds and 379 1K rental room-apartment units with 2.234 rooms and 4.926 beds. Moreover, there were 19 rental room-apartment units characterized as A, with 113 rooms and 256 beds, 2 rental

room-apartment units characterized as B, with 13 rooms and 32 beds and 48 rental room-apartment units that have not been categorized, with 282 rooms and 628 beds.

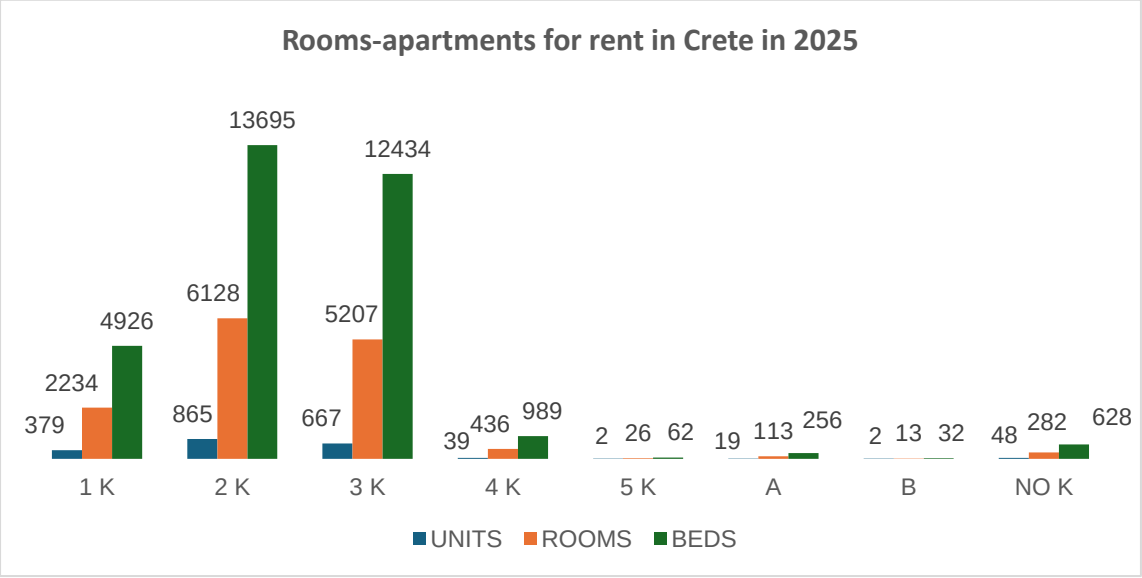


Figure 2.22 Rooms-apartments for rent in Crete in 2025
Source: Ministry of Tourism, Tourist Business Registry of Greece, 2026

2.3.1 Rooms-apartments for rent in the Regional Units of Crete

According to the Regional Units of Crete, in the Regional Unit of Heraklion there were 465 rental room-apartment units with 4.595 rooms and 9.675 beds in 2025. Grouped according to the number of keys, there were 17 4K rental room-apartment units with 193 rooms and 407 beds, 161 3K rental room-apartment units with 1.903 rooms and 4.207 beds, 181 2K rental room-apartment units with 1.735 rooms and 3.655 beds and 75 1K rental room-apartment units with 565 rooms and 1.176 beds. Moreover, there were 4 rental room-apartment units characterized as A, with 14 rooms and 34 beds, 1 rental room-apartment unit characterized as B, with 7 rooms and 15 beds and 26 rental room-apartment units that have not been categorized, with 178 rooms and 361 beds.

In the Regional Unit of Chania there were 787 rental room-apartment units, with 5.083 rooms and 12.185 beds in 2025. Grouped according to the number of keys (K), there was 1 5K rental room-apartment unit, with 15 rooms and 30 beds, 8 4K rental room-apartment units with 77 rooms and 212 beds, 284 3K rental room-apartment units with 1.771 rooms and 4.545 beds, 370 2K rental room-apartment units with 2.456 rooms and 5.683 beds and 123

1K rental room-apartment units with 760 rooms and 1.705 beds. Moreover, there was 1 rental room-apartment unit that have not been categorized, with 4 rooms and 10 beds.

In the Regional Unit of Rethymnon there were 475 rental room-apartment units, with 2.960 rooms and 7.038 beds in 2025. Grouped according to the number of keys (K), there was 1 5K rental room-apartment unit, with 11 rooms and 30 beds, 8 4K rental room-apartment units with 96 rooms and 213 beds, 158 3K rental room-apartment units with 1.026 rooms and 2.657 beds, 193 2K rental room-apartment units with 1.199 rooms and 2.680 beds and 84 1K rental room-apartment units with 448 rooms and 1.014 beds. Moreover, there were 14 rental room-apartment units characterized as A, with 97 rooms and 216 beds, 1 rental room-apartment unit characterized as B, with 6 rooms and 17 beds and 16 rental room-apartment units that have not been categorized, with 77 rooms and 209 beds.

In the Regional Unit of Lasithi there were 294 rental room-apartment units with 1.801 rooms and 4.124 beds in 2025. Grouped according to the number of keys, there were 6 4K rental room-apartment units with 70 rooms and 157 beds, 64 3K rental room-apartment units with 507 rooms and 1.205 beds, 121 2K rental room-apartment units with 738 rooms and 1.677 beds and 97 1K rental room-apartments units with 461 rooms and 1.031 beds. Moreover, there was 1 rental room-apartment unit characterized as A, with 2 rooms and 6 beds and 5 rental room-apartment units that have not been categorized, with 23 rooms and 48 beds.

Heraklion constitutes 23%, Chania 39%, Rethymnon 24% and Lasithi 14% of the total rental room-apartment units of Crete. Regarding rental rooms, Heraklion constitutes 32%, Chania 35%, Rethymnon 21% and Lasithi 12% of the number of total rental room units of Crete. Concerning the number of rental room beds, Heraklion constitutes 29%, Chania 37%, Rethymnon 21% and Lasithi 13% of the total rental room beds of Crete.

The most luxurious rental room units (4-5 K) in Crete are located in Heraklion with 41%, followed by Chania and Lasithi with 22% each and Rethymnon with 15%.

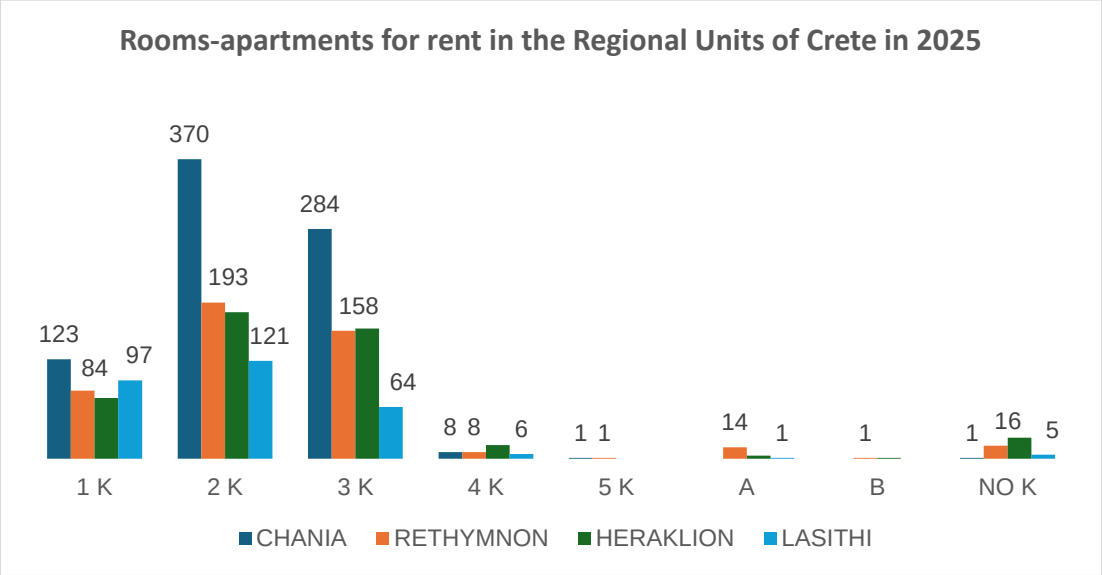


Figure 2.23 Rooms-apartments for rent in the Regional Units of Crete in 2025
Source: Ministry of Tourism, Tourist Business Registry of Greece, 2026

2.4 Furnished Tourist Residences in Crete

Regarding Furnished Tourist Residences in 2025, based on the data of Tourist Business Registry of Greece, Ministry of Tourism, there were 2.379 Furnished Tourist Residence units in Crete, with 3.164 rooms and 17.553 beds.

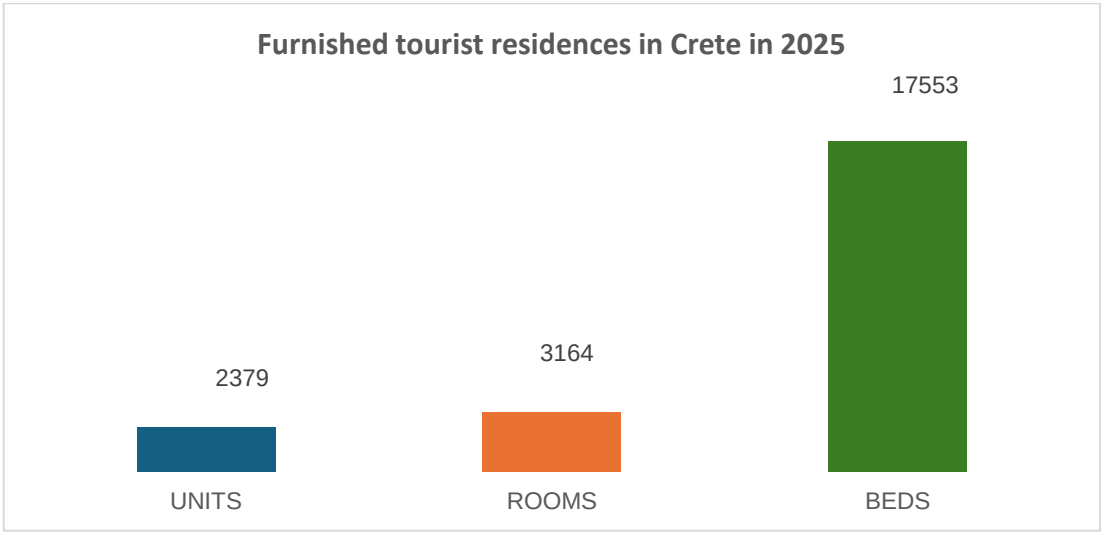


Figure 2.24 Furnished tourist residences in Crete in 2025
Source: Ministry of Tourism, Tourist Business Registry of Greece, 2026

2.4.1 Furnished Tourist Residences in the Regional Units of Crete

Regarding the Regional Units of Crete, in the Regional Unit of Chania there were 807 Furnished Tourist Residence units with 1.109 rooms and 6.644 beds in 2025. In the Regional Unit of Rethymnon there were 947 Furnished Tourist Residence units with 1.022 rooms and 6.130 beds. In the Regional Unit of Heraklion there were 356 Furnished Tourist Residence units with 570 rooms and 2.779 beds. Finally, in the Regional Unit of Lasithi there were 269 Furnished Tourist Residence units with 463 rooms and 2.000 beds.

Rethymnon comprises 40% of the total Furnished Tourist Residence units of Crete, followed by Chania with 34%, Heraklion with 15% and Lasithi with 11%. Concerning the number of Furnished Tourist Residence rooms, Chania comprises 35% of the total Furnished Tourist Residence rooms of Crete, followed by Rethymnon with 32%, Heraklion with 18% and Lasithi with 15%. Regarding the number of Furnished Tourist Residence beds, Chania comprises 38% of the total number of Furnished Tourist Residence beds of Crete, followed by Rethymnon with 35%, Heraklion with 16% and Lasithi with 11%.

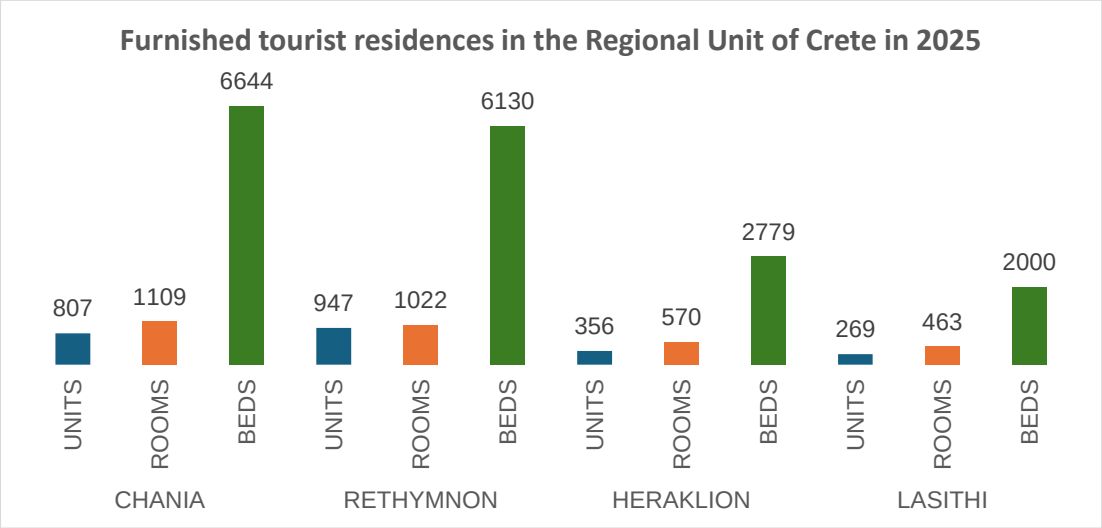


Figure 2.25 Furnished tourist residences in the Regional Units of Crete in 2025
Source: Ministry of Tourism, Tourist Business Registry of Greece, 2026

2.5 Villas in Crete

Regarding Villas in 2025, based on the data of Tourist Business Registry of Greece, Ministry of Tourism, there were 857 Villa units in Crete, with 802 rooms and 6.018 beds.

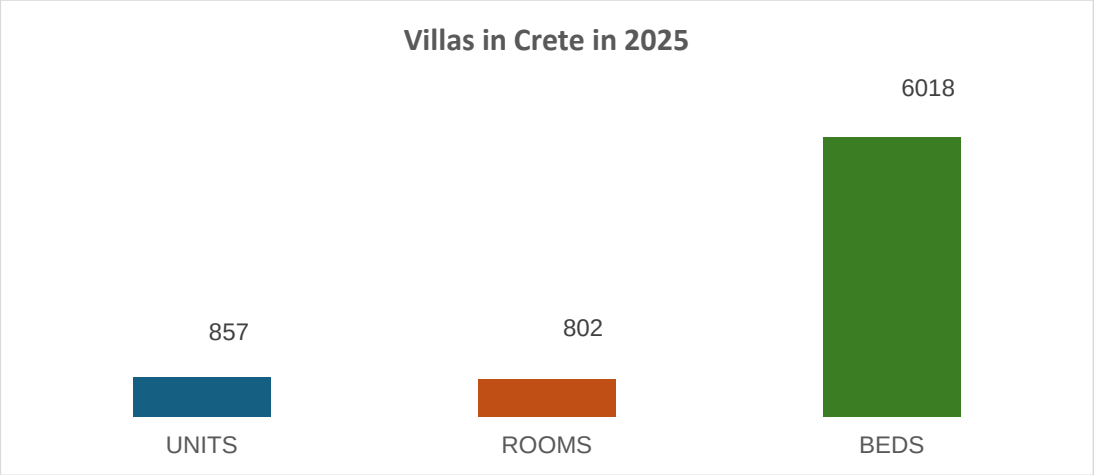


Figure 2.26 Villas in Crete in 2025
Source: Ministry of Tourism, Tourist Business Registry of Greece, 2026

2.5.1 Villas in the Regional Units of Crete

Regarding the Regional Units of Crete, in the Regional Unit of Chania there were 344 Villa units with 319 rooms and 2.365 beds in 2025. In the Regional Unit of Rethymnon there were 167 Villa units with 164 rooms and 1.278 beds. In the Regional Unit of Heraklion there were 202 Villa units with 192 rooms and 1.357 beds. Finally, in the Regional Unit of Lasithi there were 144 Villa units with 127 rooms and 1.018 beds.

Chania comprises 40% of the total Villa units of Crete, followed by Heraklion with 24%, Rethymnon with 19% and Lasithi with 17%. Concerning the number of Villa rooms, Chania comprises 40% of the total Villa rooms of Crete, followed by Heraklion with 24%, Rethymnon with 20% and Lasithi with 16%. Regarding the number of Villa beds, Chania comprises 39% of the total number of Villa beds of Crete, followed by Heraklion with 23%, Rethymnon with 21% and Lasithi with 17%.

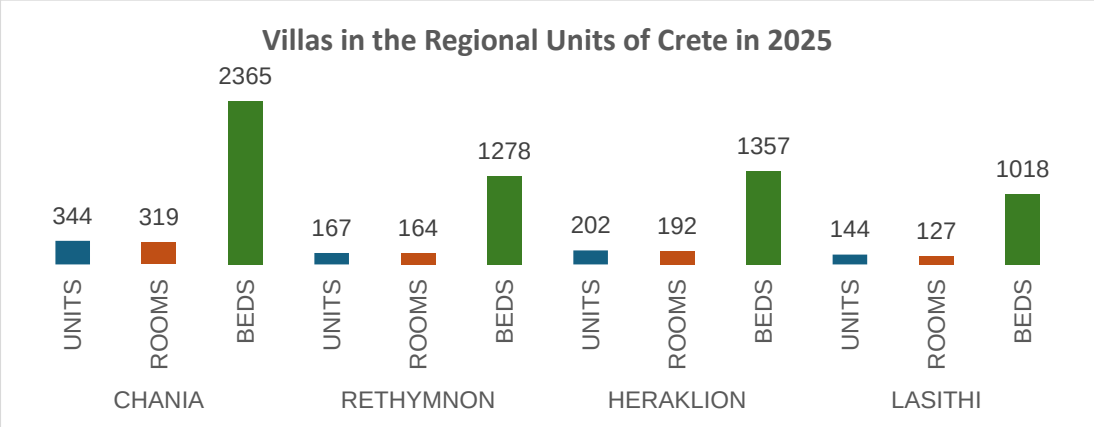


Figure 2.27 Villas in the Regional Units of Crete in 2025
Source: Ministry of Tourism, Tourist Business Registry of Greece, 2026

2.6 AirBnB in Crete

Short-term rental (AirBnB) units in 2024 in Crete numbered 34.131, with an increase of 5,9% compared to 2023 and an even higher increase of 49% compared to 2019. AirBnB rooms numbered 68.251 in 2024 with an increase of 5,4% compared to 2023 and an even higher increase of 64% compared to 2019. AirBnB beds numbered 163,344 in 2024 with an increase of 5,2% compared to 2023 and 50% compared to 2019. In 2024, Crete comprised 14,7% of the total AirBnB units in Greece, 15,9% of the total AirBnB rooms in Greece and 16% of the total AirBnB beds in Greece.

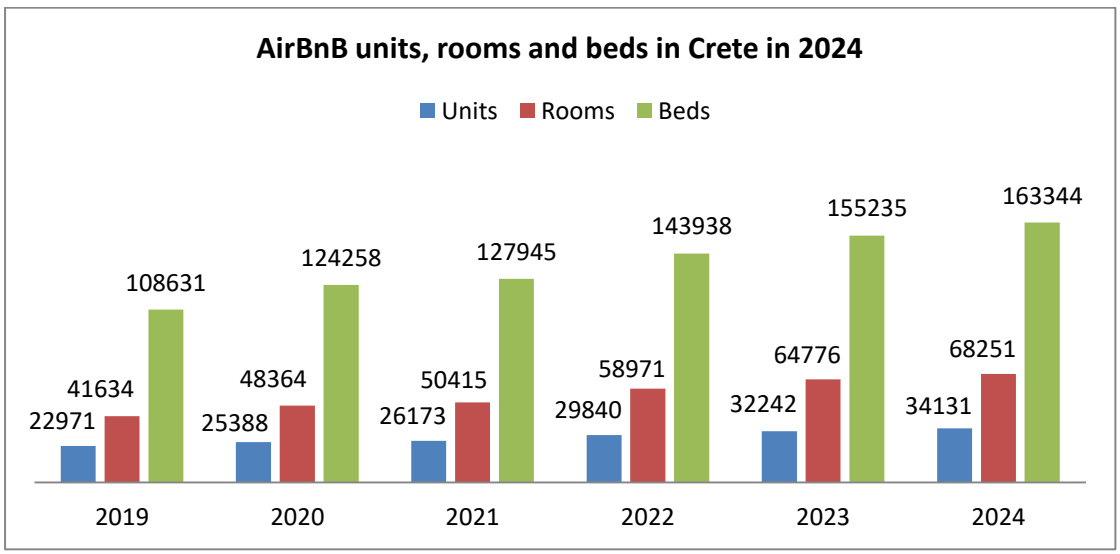


Figure 2.28 AirBnB units, rooms and beds in Crete in 2024
Source: The Lighthouse-Process INSETE Intelligence, 2025

The distribution of the AirBnB units in Crete throughout the year 2024 starts from 30.171 in January after which the number is increasing till August with 34.233, and then it begins to decrease till December with 31.882 units.

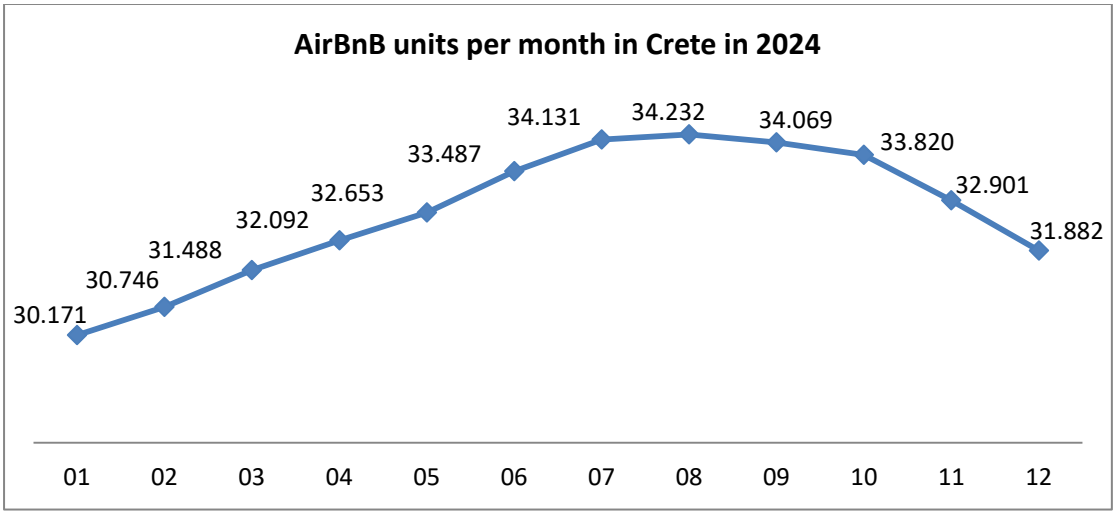


Figure 2.29 AirBnB units per month in Crete in 2024
Source: The Lighthouse-Process INSETE Intelligence, 2025

2.6.1 AirBnB in the Regional Units of Crete

The Regional Unit of Chania had the most AirBnB units in Crete in 2024 with 13.923, comprising 41% of the total AirBnB units in Crete and recording an increase of 4,8% compared to 2023 and an even higher increase of 49% compared to 2019. The Regional Unit of Heraklion follows with 9.185 units in 2024, comprising 27% of the total AirBnB units in Crete and recording an increase of 8,4% compared to 2023 and an even higher increase of 60% compared to 2019. The Regional Unit of Rethymnon comes next with 6.313 units in 2024, comprising 18% of the total AirBnB units in Crete and recording an increase of 5,4% compared to 2023 and an even higher increase of 34% compared to 2019. The Regional Unit of Lasithi is in last place with 4.710 units in 2024, comprising 14% of the total AirBnB units in Crete and recording an increase of 4,7% compared to 2023 and an even higher increase of 49% compared to 2019.

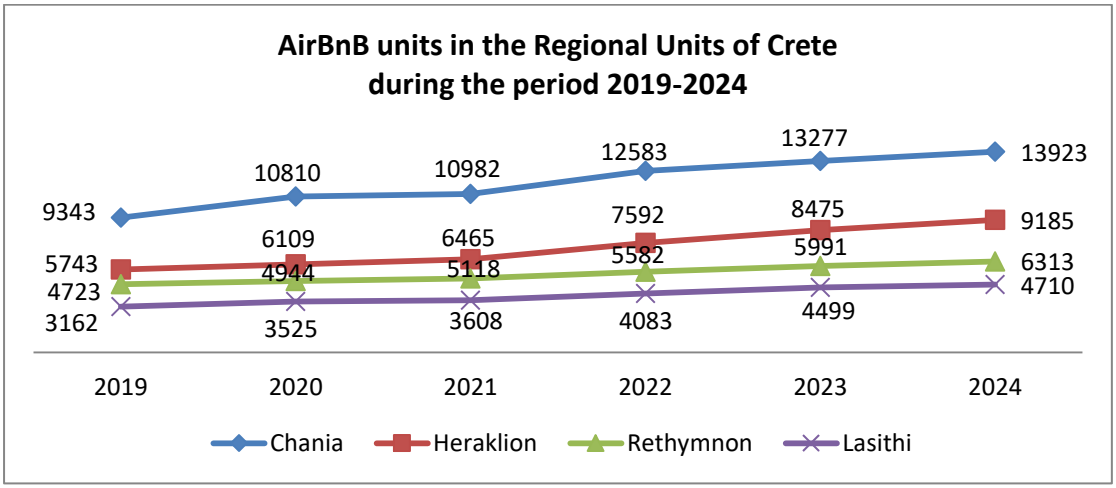


Figure 2.30 AirBnB units in the Regional Units of Crete during the period 2019-2024
Source: The Lighthouse-Process INSETE Intelligence, 2025

The Regional Unit of Chania also has the most AirBnB rooms in Crete in 2024 with 28.845, comprising 42% of the total AirBnB rooms in Crete and recording an increase of 4,2% compared to 2023 and a much higher increase of 62% compared to 2019. The Regional Unit of Heraklion follows with 16.148 units in 2024, comprising 24% of the total AirBnB rooms in Crete and recording an increase of 7,5% compared to 2023 and a much higher increase of 81% compared to 2019. The Regional Unit of Rethymnon comes next with 14.325 units in 2024, comprising 21% of the total AirBnB rooms in Crete and recording an increase of 6,9% compared to 2023 and a much higher increase of 50% compared to 2019. The Regional Unit of Lasithi is in last place with 8.933 units in 2024, comprising 13% of the total AirBnB rooms in Crete and recording an increase of 5,4% compared to 2023 and a much higher increase of 64% compared to 2019.

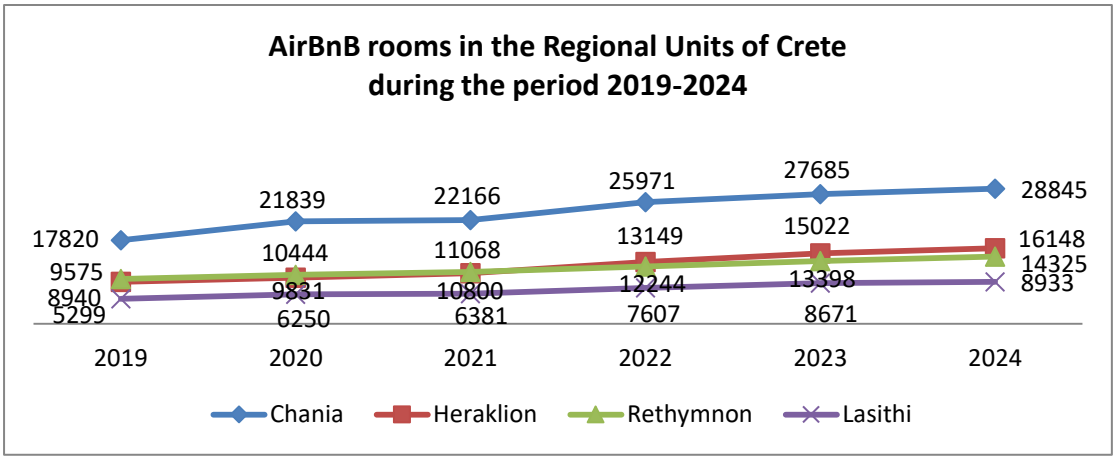


Figure 2.31 AirBnB rooms in the Regional Units of Crete during the period 2019- 2024
Source: The Lighthouse-Process INSETE Intelligence, 2025

The Regional Unit of Chania also had the highest number of AirBnB beds in Crete in 2024 with 69.097, comprising 42% of the total AirBnB beds in Crete and recording an increase of 3,9% compared to 2023 and a much higher increase of 50% compared to 2019. The Regional Unit of Heraklion follows with 39.673 beds in 2024, comprising 24% of the total AirBnB beds in Crete and recording an increase of 8,4% compared to 2023 and a much higher increase of 62% compared to 2019. The Regional Unit of Rethymnon comes next with 33.549 beds in 2024, comprising 21% of the total AirBnB rooms in Crete and recording an increase of 5,3% compared to 2023 and a much higher increase of 39% compared to 2019. The Regional Unit of Lasithi is in last place with 21.025 beds in 2024, comprising 13% of the total AirBnB beds in Crete and recording an increase of 3,7% compared to 2023 and a much higher increase of 50% compared to 2019.

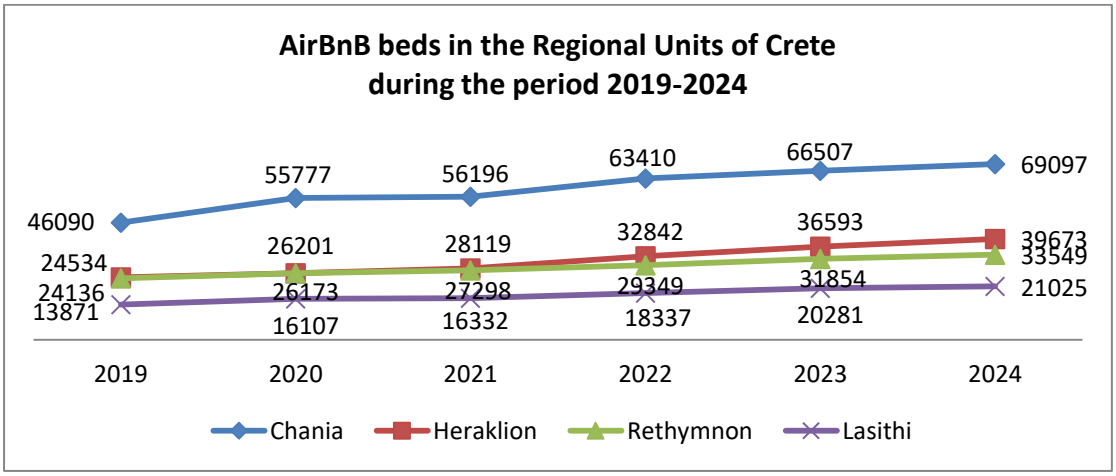


Figure 2.32 AirBnB beds in the Regional Units of Crete during the period 2019- 2024
Source: The Lighthouse-Process INSETE Intelligence, 2025

Concerning the average size of the AirBnB accommodations the rooms/unit ratio is 2 in Crete while in Greece, it is 1,8. As far as the Regional Units of Crete are concerned, the highest average size appears in Rethymnon with 2,3, followed by Chania with 2,1 and then Lasithi with 1,9 and finally Rethymnon with 1,8. Regarding the beds/unit ratio in Crete, it is 4,8 while in Greece it is 4,4. The Regional Unit of Rethymnon had the highest ratio at 5,3, followed by Chania with 5, Lasithi with 4,5 and Heraklion with 4,3 beds per unit.

The distribution of the AirBnB units in the Regional Unit of Chania throughout the year 2024 started with 12.352 in January, increasing till August with 13.931, and then decreasing till December with 12.788 units. In the Regional Unit of Heraklion, there were 7.909 AirBnb

units in January 2024, increasing till August with 9.207 and then decreasing till December with 8.599 units. In the Regional Unit of Rethymnon, there were 5.684 in January 2024, increasing till August with 6.341 and then decreasing till December with 6.053 units. Finally, in the Regional Unit of Lasithi there were 4.226 in January 2024, increasing till August with 4.753 and then decreasing till December with 4.442 units.

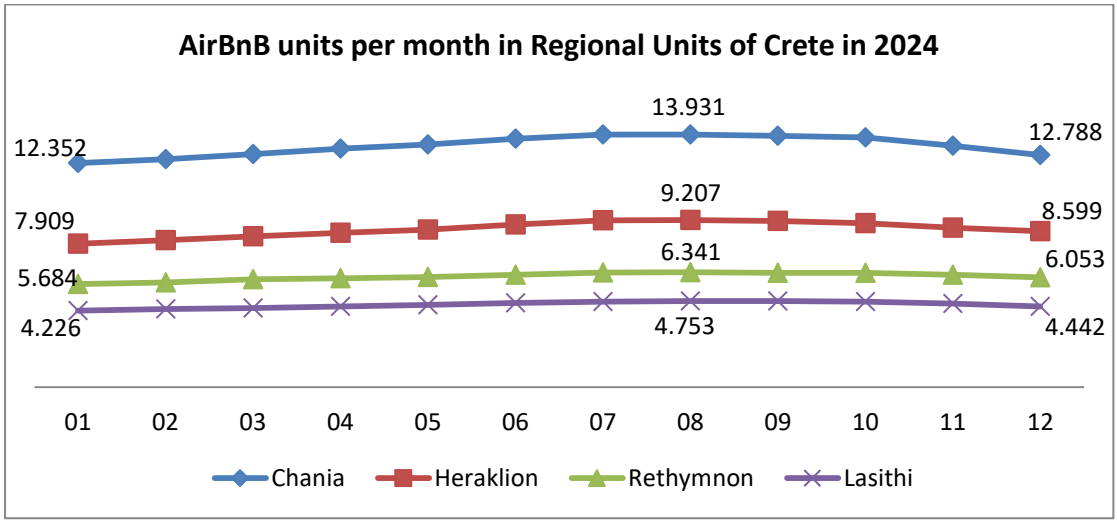


Figure 2.33 AirBnB units per month in the Regional Units of Crete in 2024
Source: The Lighthouse-Process INSETE Intelligence, 2025

CHAPTER 3

MAIN FIGURES OF TOURISM

3.1 Arrivals of tourists through international flights in Greece

The total arrivals of foreign tourists who came in Greece in 2025 were 38 millions, excluding cruise ships. 73,2% of the total arrivals of foreign tourists came in Greece by air, 25,4% by road, 1,4% by sea and 0,01% by train. If cruises ships are included then the toal arrivals of foreigners in 2025 were 43,3 million.

In 2025 the number of passengers who arrived in Greece through international flights was 27.792.724 which was the highest number ever of arrivals, having an increase of 6,5% compared to 2024 when there were 26.094.478. Compared to 2019, the increase in 2025 was higher by 29% and compared to 2013 the increase was much higher by 117%. In 2013 the passengers of international flights were 12.810.510, and there was an increase of 68% till 2019. An annual decrease took place in the pandemic year 2020 by 74%. But from 2020 till 2025 there was a continuous increase of passengers from international flights in Greece.

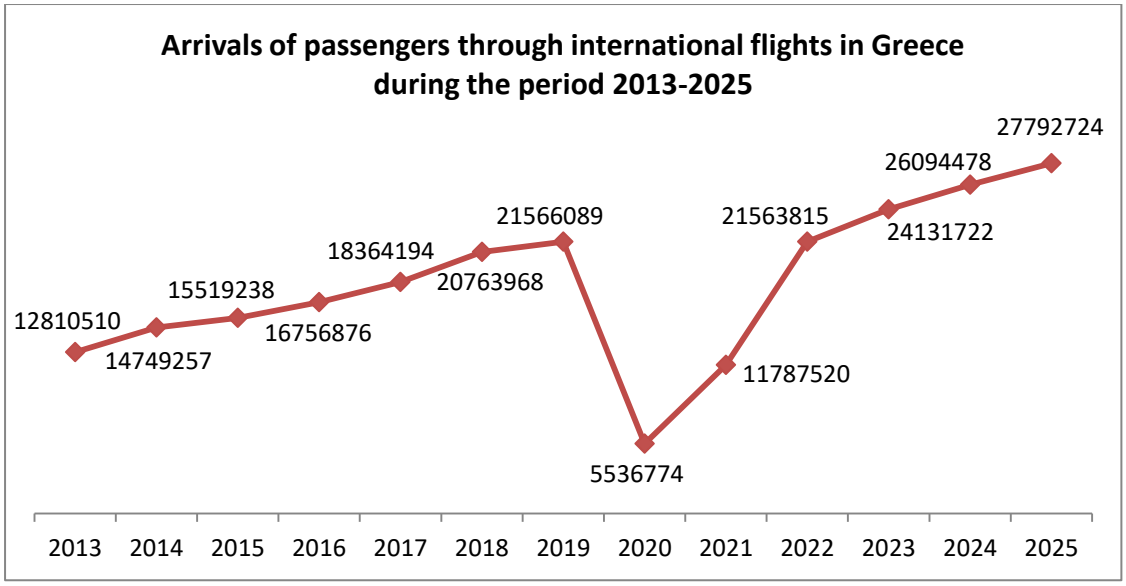


Figure 3.1 Arrivals of passengers through international flights in Greece during the period 2013-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026; INSETE Intelligence, 2026

Crete constituted one fifth of the total foreign arrivals who came in Greece through international flights in 2025. In Crete, there are 3 airports: one in Heraklion, one in Chania and a smaller one in Sitia located in the Regional Unit of Lasithi.

3.1.1 Foreign arrivals at the airport of Chania through international direct flights

Regarding the arrivals of foreign tourists at Chania airport based on the data from the Chania Civil Aviation Authority and Fraport Greece (2026), for the period 1995-2025, there was an increase of 375%. More specifically, the arrivals of foreign tourists who came via the airport of Chania through direct flights in 1995 were 334 thousand; by 2025 this increased to 1,6 million. From 1995 to 2007 there was an increase of 105% in tourist arrivals, going up to 685 thousand. Then from 2007 to 2010 there was a decrease of 13% going down to 597 thousand. From 2010 till 2019 there was an increase of 91% in tourist arrivals going up to 1,1 million. In 2020 there was a drastic reduction of 82% due to the coronavirus going down to 201 thousand, which was the lowest number of foreign arrivals during the period 1995-2025. After that year there was a continuous increase, reaching 690% (1,6 million) in 2025, which is the highest number of arrivals ever recorded at the airport of Chania. Compared to the previous year, there was an increase of 4,1% in foreign tourist arrivals.

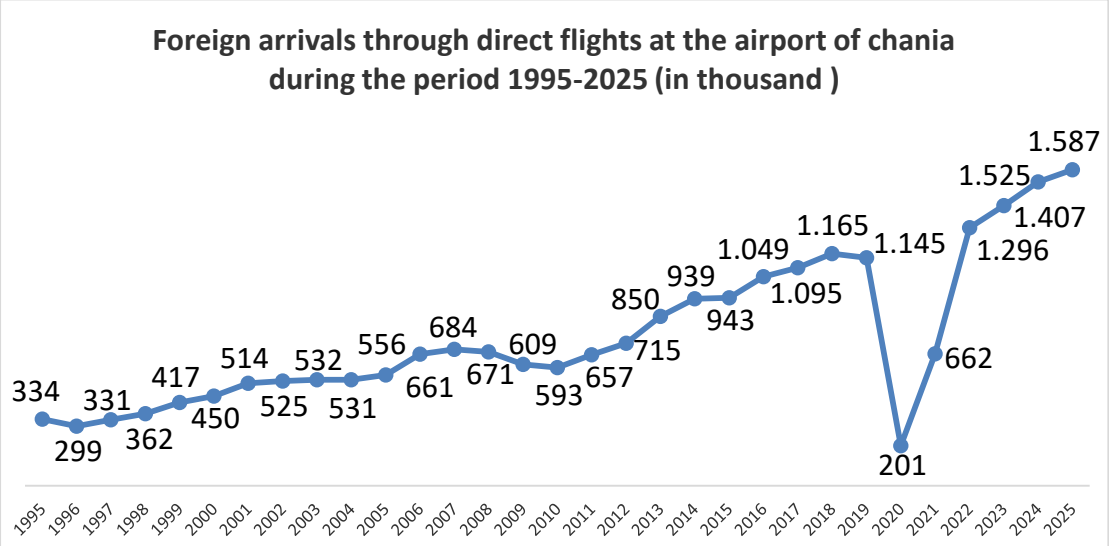


Figure 3.2 Foreign arrivals through direct flights at the airport of Chania during the period 1995-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026

Looking at the distribution per nationality in 2025, the British are in first place with 18% of the total foreign arrivals at the airport of Chania, followed by Germans with 12,6%, Danes with 10.8%, Poles with 10%, Norwegians with 9,4%, Swedes with 7,3% and Finns with 6,5%. Concerning other nationalities, the French and Italians are in eighth and ninth place

respectively with 3,9%, Austrians follow with 2,6%, Belgians with 2,2% and Cypriots with 1,9%.

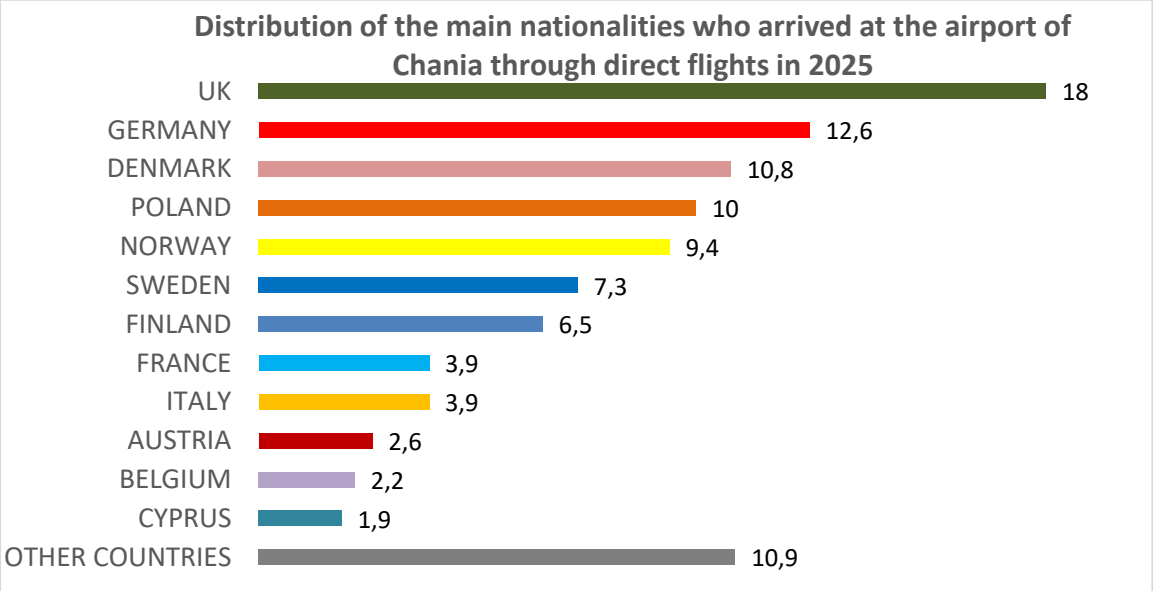


Figure 3.3 Distribution of the main nationalities who arrived at the airport of Chania through direct flights in 2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026

During the period 2007-2025 there was an increase of 25% in Scandinavian (Denmark, Norway, Sweden, Finland) arrivals at the airport of Chania through direct flights going up from 434 thousand to 541 thousand arrivals. That increase was actually implemented during the period 2007-2019. In 2020 there was an annual decrease of 92% of Scandinavians going down to 42 thousand while from 2020 till 2025 there was an increase of 1180%, overreaching the number of arrivals in 2019, the year before the coronavirus period. Compared to the previous year, there was a marginal decrease of 0,2% in Scandinavian tourist arrivals. Generally, Scandinavians were stabilizing at around 35% of total arrivals after the coronavirus period, when before that, their percentage was around 50%, while in 2010 it reached 72%.

On the contrary, during the period 2007-2025 there was a huge increase of 316% in non-Scandinavian arrivals at the airport of Chania through direct flights going up from 251 thousand to 1 million arrivals. From 2007 till 2010 there was a decrease of 34% in non-Scandinavian arrivals going down to 166 thousand, while from 2010 till 2019 there was an increase of 265% going up to 606 thousand arrivals. In 2020 there was an annual decrease of 74% of non-Scandinavian arrivals going down to 158 thousand and from 2020 till 2025 there

was a continuous increase of 560%. Compared to the previous year, there was an increase of 6,5% in non-Scandinavian tourist arrivals. Generally, non-Scandinavians are stabilizing at around 65% of total arrivals after the coronavirus period, when before that, their percentage had been around 50%, while their percentage in 2010 went down to 28%.

The very large increase of non-Scandinavians is mainly due to the fact that the low-cost airline Ryanair, which started its flights in 2010 at Chania airport, established a base here in 2012 with over 25 European destinations, transporting mainly non-Scandinavian visitors.

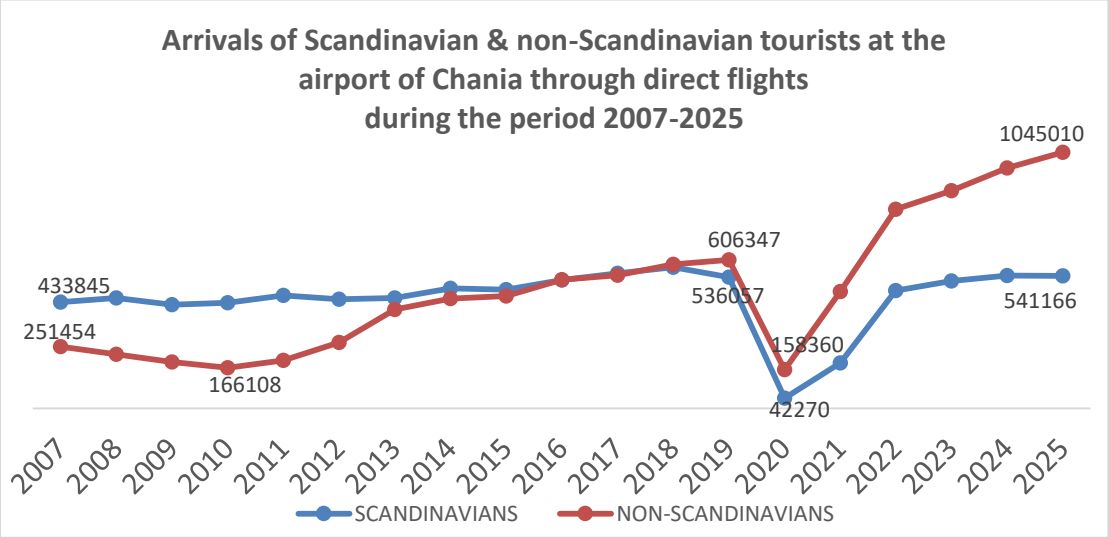


Figure 3.4 Arrivals of Scandinavian & non-Scandinavian tourists at the airport of Chania through direct flights during the period 2007-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026

3.1.2 Foreign arrivals at the airport of Heraklion though international direct flights

Regarding the arrivals of foreign tourists at Heraklion airport based on the data from the Heraklion Civil Aviation Authority (2026), for the period 1995-2025, there was an increase of 160% in tourists. More specifically, the arrivals of foreign tourists who came via the airport of Heraklion through direct flights in 1995 were 1,6 million and in 2025 this increased to 4,1 million. From 1996 to 1999 there was an increase of 41% in tourists going up from 1,5 to 2,1 million. After that, there was no significant change till 2010. From 2010 till 2019 there was an increase of 71% in tourist arrivals going up from 1,9 to 3,3 million. In 2020 there was a drastical reduction of 73% in arrivals during the coronavirus period going down to 0,9 million, which was the lowest number of foreign arrivals during the period 1995-2025. After that year there was a continuous increase of 351% reaching 4,1 million in 2025, which is the

highest number of arrivals ever recorded at the airport of Heraklion. Compared to the previous year, there was an increase of 8,2% in foreign tourist arrivals.

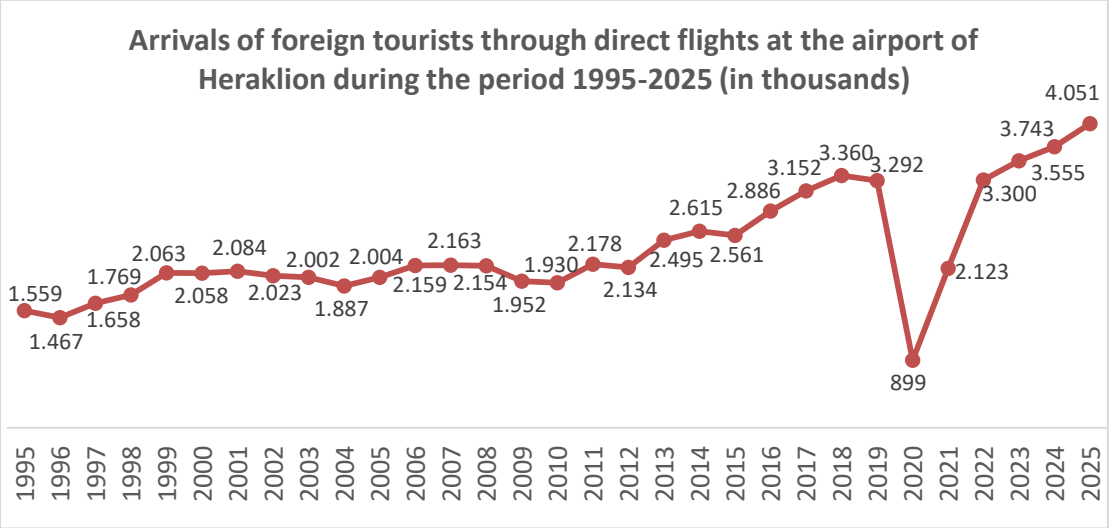


Figure 3.5 Arrivals of foreign tourists through direct flights at the airport of Heraklion during the period 1995-2025
Source: Civil Aviation Authority, 2026

Looking at the distribution per nationality in 2025, Germans are in first place with 30% of the total foreign arrivals at the airport of Heraklion, a percentage that is almost double that of the British, who occupy second place with 16,4%. The French follow with 10,5%. Concerning other nationalities, the Poles are in fourth place with 5,7% and then the Dutch follow with 5%, Israelis with 4,2%, Italians with 3,9%, Swiss with 3,4%, Belgians with 3,1%, Romanians and Austrians with 2,9% and Czechs with 2,7%.

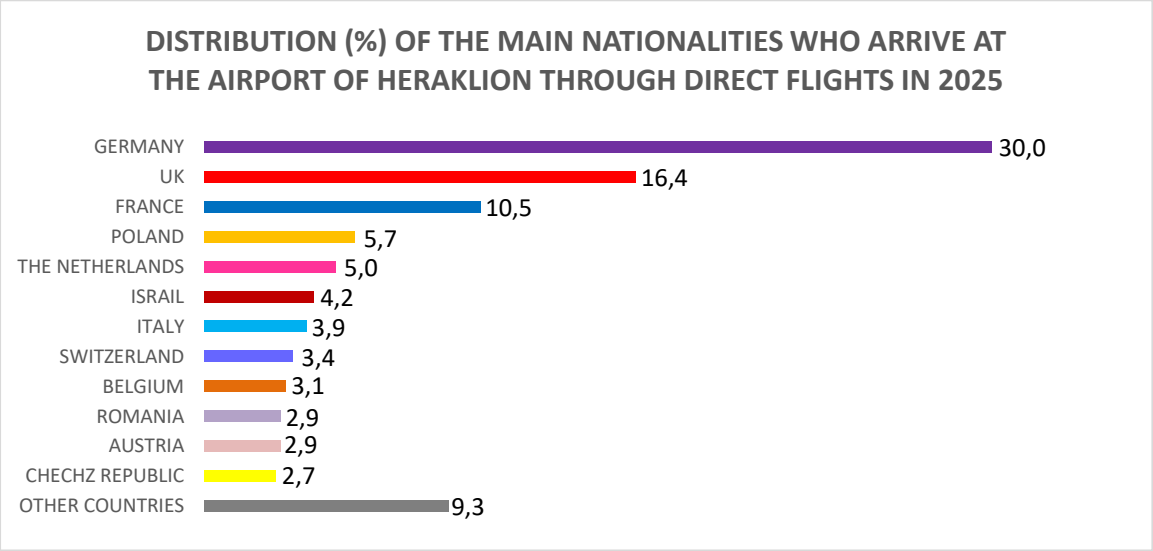


Figure 3.6 Distribution of the main nationalities who arrived at the airport of Heraklion through direct flights in 2025
Source: Civil Aviation Authority, 2026

Regarding the main nationalities who arrived at the airport of Heraklion though direct flights during the period 2010-2025, Germans recorded an increase of 208% going from 395 thousand in 2010 to 1,2 million arrivals in 2025. From 2012 till 2019 there was an increase of 145% in German tourists going from 365 thousand to 894 thousand arrivals. Then there was a significant annual decrease of 55% due to coronavirus going down to 401 thousand arrivals and afterwards there was an increase of 203% till 2025. Compared to the previous year, the increase was 9,1%.

The British recorded an increase of 92% going from 347 thousand in 2010 to 665 thousand arrivals in 2025. From 2010 till 2019 there was an increase of 29% in British tourists going up to 448 thousand arrivals. Then there was a huge annual decrease of 78% going to 97 thousand arrivals due to coronavirus and afterwards there was an increase of 586% till 2025. Compared to the previous year, the increase was 12,9%.

The French recorded an increase of 85% going from 231 thousand in 2010 to 427 thousand arrivals in 2025. From 2010 till 2019 there was an increase of 54% of French arrivals going up to 356 thousand arrivals. Then there was a significant annual decrease of 72% going down to 99 thousand arrivals due to coronavirus and afterwards there was an increase of 333% till 2025. Compared to the previous year the increase was 4,4%.

The Russians recorded 171 thousand arrivals in 2010, acquiring fourth place in the total arrivals with an increase of 175% till 2013, keeping them in first place. From 2013 till 2019 there was a significant decrease of 43% going down to 270 thousand arrivals but from 2022 till 2025 there were no Russian arrivals at the airport of Heraklion due to the military invasion of Ukraine and the subsequent sanctions by the European Union.

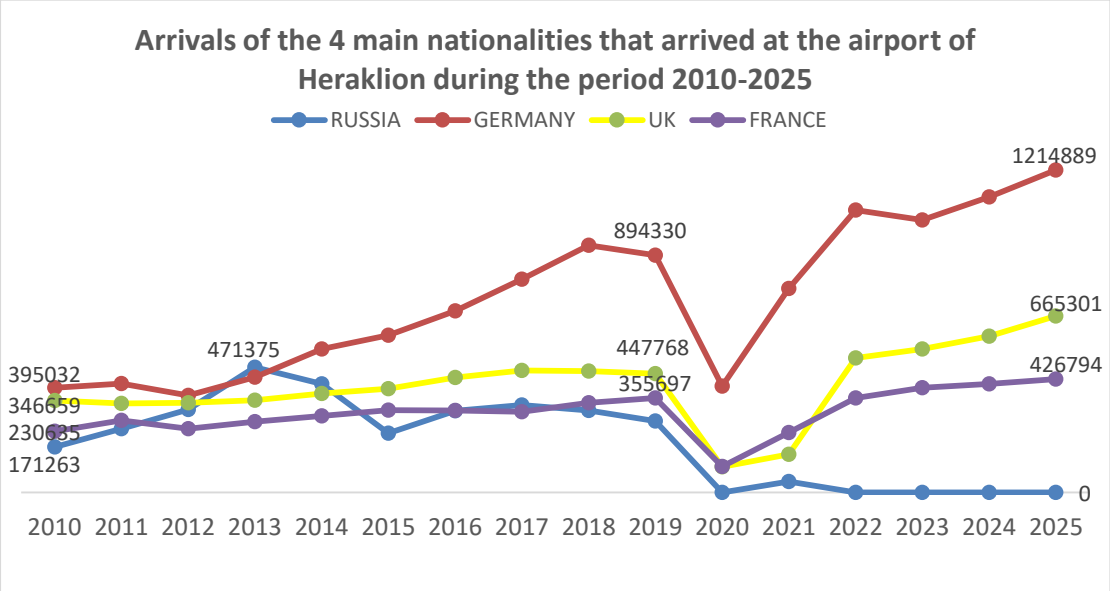


Figure 3.7 Arrivals of the 4 main nationalities that arrived at the airport of Heraklion during the period 2010-2025
Source: Civil Aviation Authority, 2026

Heraklion constitutes 72% of the total passengers of international flights that arrived in Crete in 2025, and Chania follows with 28%. There is also an airport in Sitia but there are very few foreign tourists who prefer it.

3.2 Arrivals of tourists through domestic flights in Crete

In 2025 the number of passengers who arrived in Crete through domestic flights was 1.433.668, which was the highest number of arrivals during the period 2010-2025, having an increase of 9,3% compared to 2024 when there were 1.311.121. Compared to 2019, the increase in 2025 was higher by 44,6% while compared to 2010 the increase was much higher by 90,7%. In 2010 the passengers of domestic flights were 751.725, and in the next 3 years there was a decrease of 19%. From 2013 till 2019 the increase was 62% and then there was an annual decrease in the pandemic year 2020 by 55%. From 2020 till 2025 there was a continuous increase in passengers of domestic flights to Crete.

At the airport of Heraklion, in 2025 the number of passengers who came through domestic flights was 931.064, which was the highest number of arrivals during the period 2010-2025, having an increase of 10% compared to 2024 when there were 846.119. Compared to 2019, the increase in 2025 was higher by 43,5% while compared to 2010 the increase was much

higher by 84,5%. In 2010 the passengers of domestic flights were 504.633, and in the next 4 years there was a decrease of 24%. From 2014 till 2019 the increase was 59% and then there was an annual decrease in the pandemic year 2020 by 55%. From 2020 till 2025 there was a continuous increase in passengers of domestic flights to Heraklion.

At the airport of Chania, in 2025 the number of passengers who flew in via domestic flights was 482.962, which was the highest number of arrivals during the period 2010-2025, having an increase of 9,2% compared to 2024 when there were 442.242. Compared to 2019, the increase in 2025 was higher by 45,9% and compared to 2010 the increase was much higher by 112%. In 2010 the passengers of domestic flights were 227.956, but in the next 3 years there was a decrease of 18,5%. From 2013 till 2029 the increase was 78% and then there was an annual decrease in the pandemic year 2020 by 56%. From 2020 till 2025 there was a continuous increase in the passengers of domestic flights to Crete.

At the airport of Sitia in 2025 the number of passengers who came through domestic flights was just 19.642, having a decrease of 13,7% compared to 2024 when there were 22.720, which was the highest number of arrivals during the period 2010-2025. Compared to 2019, there was an increase in 2025 by 70% and compared to 2010 the increase was much lower by 2,6%.

Heraklion constitutes 64,9% of the total passengers of domestic flights that arrived in Crete in 2025; Chania follows with 33,7% and Sitia is last with 1,4%.

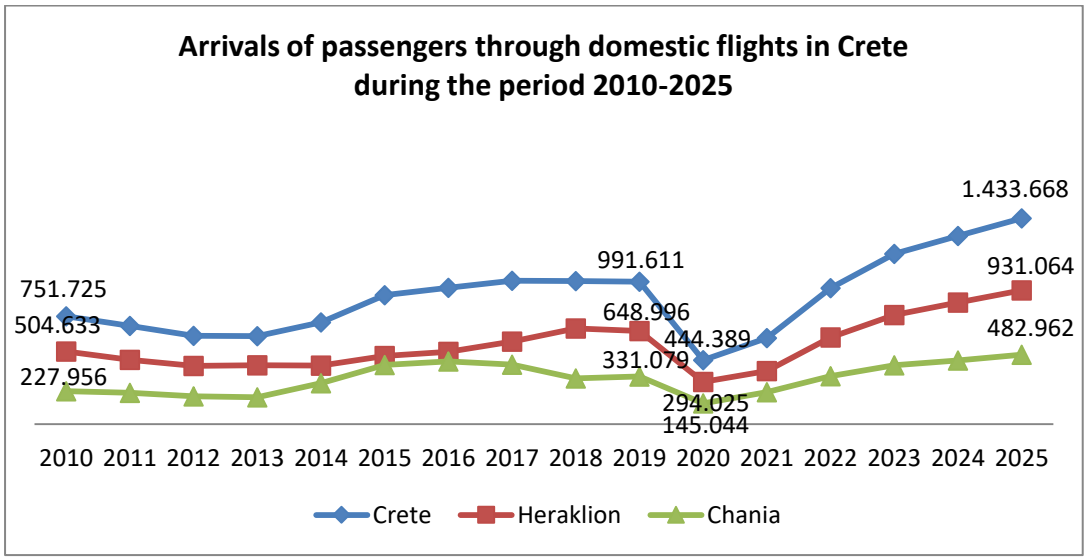


Figure 3.8 Arrivals of passengers through domestic flights in Crete during the period 2010-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026; INSETE Intelligence, 2026

3.3 Foreign visits in Crete and Greece

In 2025 the number of foreign visitors in Greece, excluding cruise ships, was 41,7 million, which was the highest number ever of visitors, having an increase of 6% compared to 2024 when there were 39,3 million thousands visits. Compared to 2019, the increase in 2025 was 14% and compared to 2016 the increase was much higher by 47%. In 2016 foreign visitors were 28,4 million, and there was an increase of 29% till 2019. An annual decrease took place in the pandemic year 2020 by 77%. From 2020 till 2025 there was a continuous increase of foreign visitors to Greece.

In 2025 the number of foreign visitors who arrived in Crete through international flights, domestic flights and ships, excluding cruise ships, was 6,4 million, which was the highest number ever of visitors, having an increase of 6,6% compared to 2024 when there were 6 million visitors. Compared to 2019, the increase in 2025 was 20% and compared to 2016 the increase was much higher by 40%. In 2016 foreign visitors were 4,5 million, and there was an increase of 17% till 2019. An annual decrease took place in the pandemic year 2020 by 77%. From 2020 till 2025 there was a continuous increase of foreign visitors to Crete.

In 2025, foreign visitors who visited in Crete through international flights, domestic flights and ships, excluding cruise ships, constituted 15,2% of all the foreign visitors in Greece who arrived through flights, road and train network and commercial ships, excluding cruise ships.

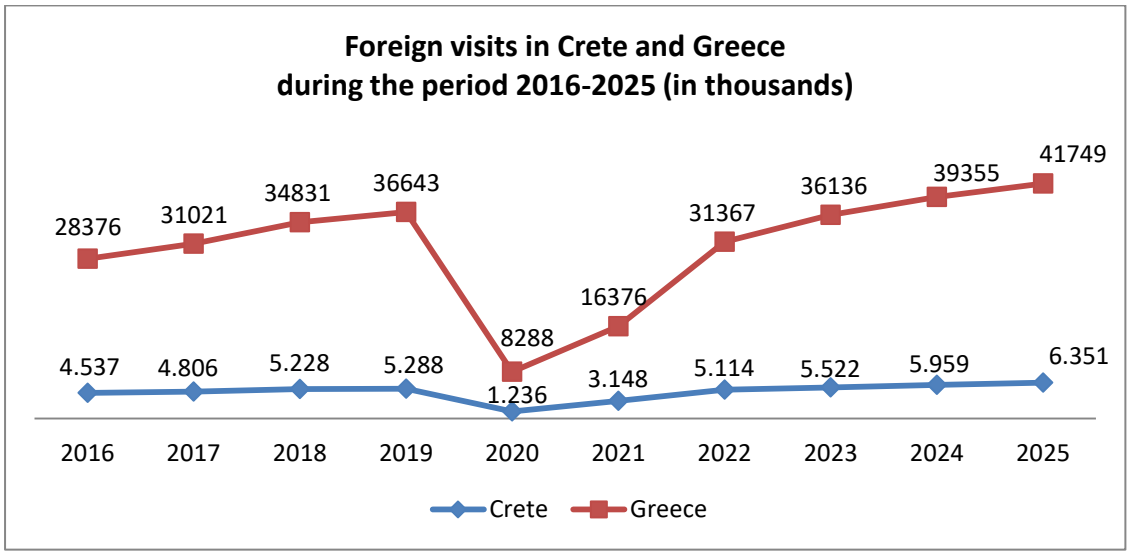


Figure 3.9 Foreign visitors in Crete and Greece during the period 2016-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026; INSETE Intelligence, 2026

Looking at the foreign visitors per nationality who arrived at the airports of Crete through international and domestic flights and at the ports through domestic ships, there are 3 nationalities that stand out, namely Germans, British and French, who constitute a percentage from 46,5% till 60,7% of the total foreign visits in Crete during the period 2016-2025.

In 2025 the number of German visitors who arrived in Crete was 1,7 million, which was the highest number ever of visits, having an increase of 6,4% compared to 2024 when there were 1,6 million visits. Compared to 2019, the increase in 2025 was higher by 28% and compared to 2016 the increase was much higher by 60%. In 2016 Germans were 1,1 million, and there was an increase of 25% till 2019. An annual decrease took place in the pandemic year 2020 by 66%. From 2020 till 2025 there was a continuous increase of Germans in Crete.

In 2025 the number of British visitors who arrived in Crete was 897 thousands, having an increase of 3,1% compared to 2024 when it was 871 thousand visits. Compared to 2019, the increase in 2025 was higher by 51% and compared to 2016 the increase was almost the same by 48%. In 2016 British visitors were 604 thousands, and there was a small decrease of 1,4% till 2019. An annual higher decrease took place in the pandemic year 2020 by 75%. From 2020 till 2022 there was an increase of 724% with the number of British visitors reaching 1,2 million, being the highest number ever of British visits but in 2023 there was a sudden decrease of 33% of British visitors in Crete.

In 2025 the number of French visitors who arrived in Crete was 658 thousands, having an increase of 4,4% compared to 2024 when there were 630 thousand visits. Compared to 2019, there was an increase in 2025 by 13% and compared to 2016 the increase was much higher by 47%. In 2016 the French visitors were 447 thousands, and there was an increase of 31% till 2019. An annual decrease took place in the pandemic year 2020 by 74%. From 2020 till 2023 there was an increase of 22% of French visitors reaching 670 thousand visits, which was the highest number ever of French visitors in Crete.

In 2025, Germans constituted 26,7% of all the foreign nationalities who arrived in Crete through international flights, domestic flights and ships; the British followed with 14,1% and then the French with 10,4%.

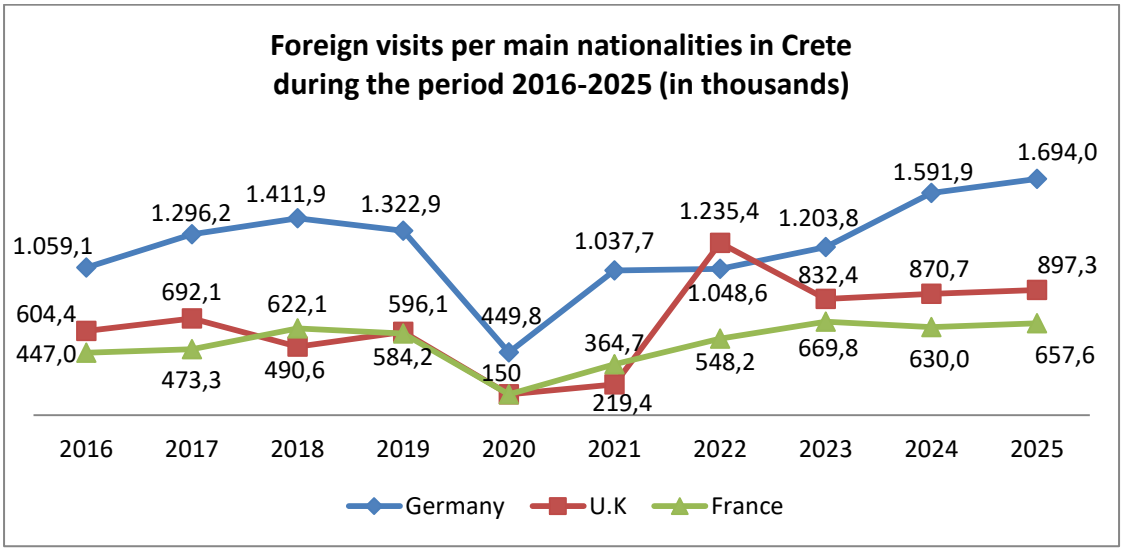


Figure 3.10 Foreign visits per main nationalities in Crete during the period 2016-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026; INSETE Intelligence, 2026

Concerning the other nationalities who arrived in Crete through international flights, domestic flights and ships, in 2025 the number of Italian visitors who arrived was 297 thousands, which was the highest number of visits during the period 2016-2025, having an increase of 7,3% compared to 2024 when there were 277 thousand visitors. Compared to 2019, the increase in 2025 was higher by 23% and compared to 2016 the increase was 32%. In 2016 Italians were 224 thousands, and there was an increase of 7,3% till 2019. An annual high decrease took place in the pandemic year 2020 by 84%. From 2020 till 2025 there was a continuous increase of Italian visitors who arrived in Crete.

In 2025 the number of Belgian visitors who arrived in Crete was 265 thousands, being the highest number of Belgian visitors through the period 2016-2025, having an increase of 11% compared to 2024 when there were 240 thousand visitors. Compared to 2019, the increase in 2025 was higher by 26% and compared to 2016 the increase was 42%. In 2016 Belgians were 186 thousands, and there was an increase of 13% till 2019. An annual high decrease took place in the pandemic year 2020 by 82%. From 2020 till 2025 there was a continuous increase of Belgians visitors that arrived at the airports of Crete.

The number of Dutch visitors who arrived in Crete in 2025 was 290 thousands, having an increase of 27% compared to 2024 when there were 229 thousand visitors. Compared to 2019, there was a decrease in 2025 by 1,8% and compared to 2016 there was an increase of 10,9%. In 2016 the Dutch were 261 thousands, and there was an increase of 13% till 2019.

An annual decrease took place in the pandemic year 2020 by 81%. From 2020 till 2022 there was an increase of 498% with 337 thousand visitors, which was the highest number ever of Dutch visitors; from 2022 till 2024 a decrease of 32% in Dutch visitors to Crete was recorded.

In 2025 the number of Swiss visitors who arrived in Crete was 173 thousands, having a small increase of 1,3% compared to 2024 when there were 170 thousand visitors. Compared to 2019, there was a decrease in 2025 by 6,1% and compared to 2016 there was an increase of 15%. In 2016 the Swiss were 151 thousands, and there was an increase of 22% till 2019. An annual high decrease took place in the pandemic year 2020 by 74%. From 2022 till 2025 there was a contnuus increase of Swiss arrivals in Crete by 46%. The highest number of Swiss visitors through the period 2016-2025 was recorded in 2018 with 184 thousands.

Concerning Russians, in 2021 there were only 12 thousands Russian visitors in Crete due to the crisis with Ukraine and till 2025 there were no Russian visitors in Crete. In 2016 the Russians were 150 thousands, which was the highest number of visits during the period 2016-2025 and there was a decrease 13% till 2019. During the pandemic period there were also no Russian visits.

In 2025, Italians constituted 4,7% of all the foreign nationalities who arrived in Crete through international flights, domestic flights and ships; the Dutch followed with 4,6%%, Belgians with 4,2% and the Swiss with 2,7%.

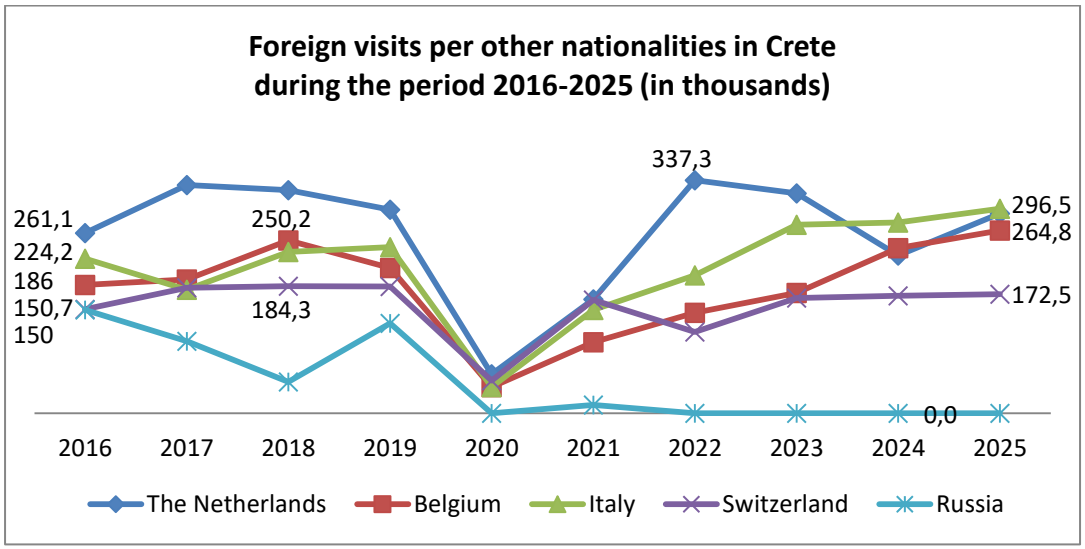


Figure 3.11 Foreign visits per other nationalities in Crete during the period 2016-2025
Sources: Civil Aviation Authority, 2026; Fraport Greece, 2026; INSETE Intelligence, 2026

3.4 Arrivals of cruise ships in Crete and Greece

In 2025 in Greece the number of cruise ships that arrived at the ports were 6.129, which was the highest number of cruise ships during the period 2013-2025, having an increase of 11,6% compared to 2024 when there were 5.490 cruise ships. Compared to 2019, the increase in 2025 was higher by 54% and compared to 2013 the increase was 43%. In 2013 the cruise ships were 4.288; after some fluctuations they went down to 3.979 in 2019 and in the pandemic year the number dropped to 210. After 2020 there was a continuous increase till 2025 by 2.819%.

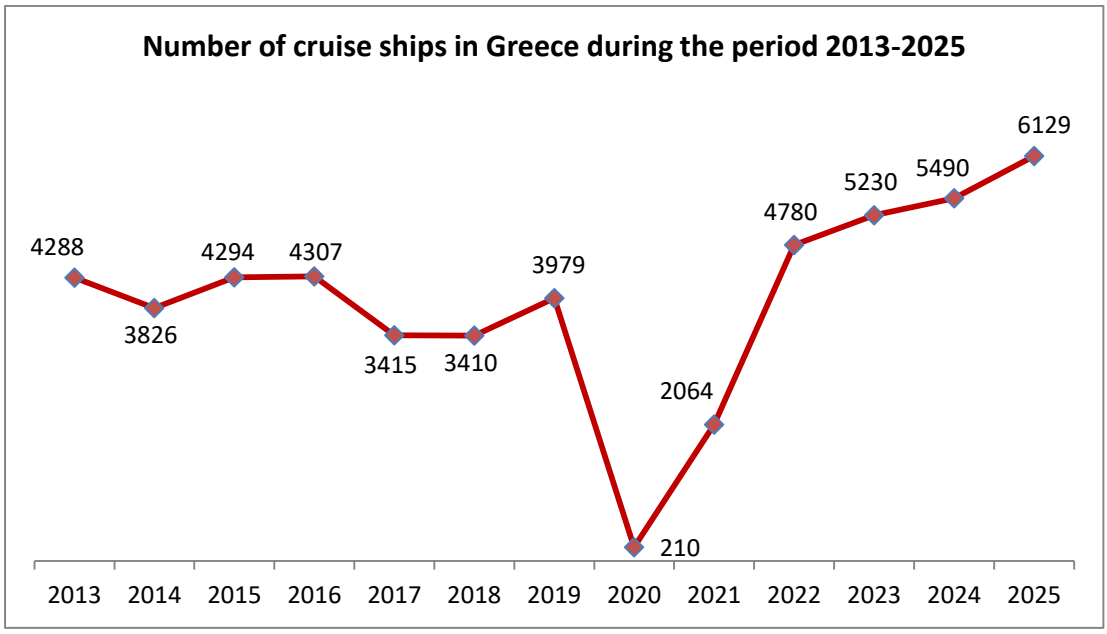


Figure 3.12 Number of cruise ships in Greece during the period 2013-2025
Source: Hellenic Ports Association, 2026

In 2025 in Crete the number of cruise ships that arrived at the ports was 556, which was the highest number of cruise ships during the period 2010-2025, having an increase of 17,5% compared to 2024 when there were 473 cruise ships. Compared to 2019, the increase in 2025 was higher by 40% and compared to 2010 the increase was much higher by 108%. In 2010 the cruise ships were 268, in 2012 they decreased to 210 cruise ships and then there was an increase (apart from 2017) till 2019 with 397 cruise ships. In the pandemic year 2020, the number of cruise ships dropped to 34 and in the next years there was a continuous increase till 2025 by 1.535%. Crete constituted 9,1% of the total cruise ships that arrived in Greece in 2025.

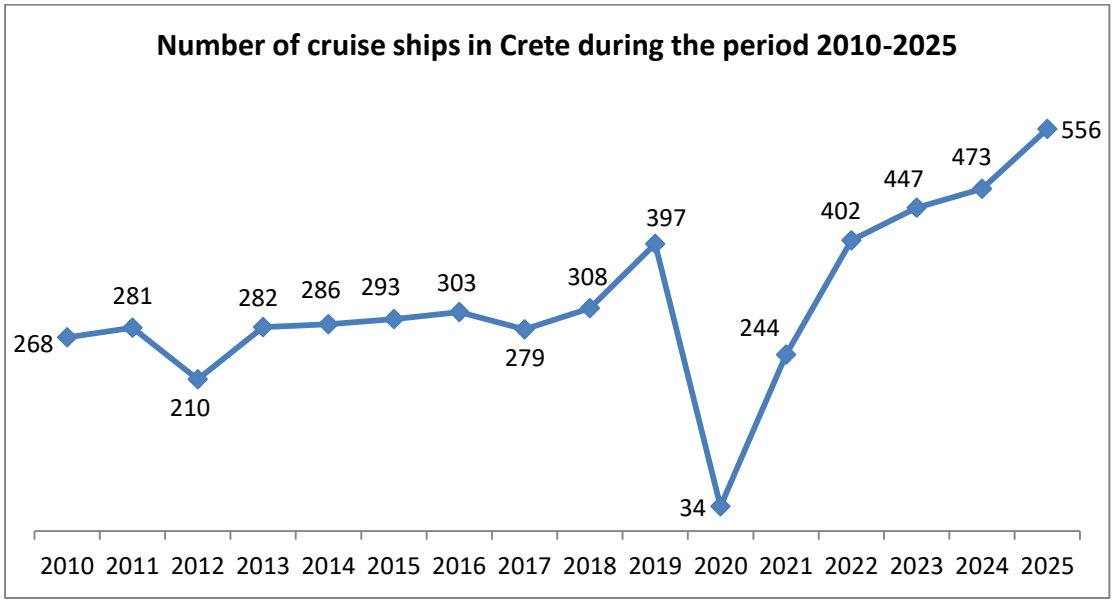


Figure 3.13 Number of cruise ships in Crete during the period 2010-2025
Source: Hellenic Ports Association, 2026

Regarding the Regional Units of Crete, the highest number of cruise ships arrived in the Regional Unit of Heraklion throughout the period 2010-2025. In 2025 in Heraklion the number of cruise ships that arrived was 281, which was the highest number of cruise ships during the period 2010-2025, having an increase of 5,6% compared to 2024 when there were 266 cruise ships. Compared to 2019, the increase in 2025 was higher by 38% and compared to 2010 the increase was lower by 13,8%. The lowest number of cruise ships was in the pandemic year (2020) with 24 cruise ships. In the next years there was a continuous increase till 2025 by 1.071%.

In Chania the number of cruise ships that arrived in 2025 was 190, recording the highest number of cruise ships during the period 2010-2025, having an increase of 45% compared to 2024 when there were 131 cruise ships. Compared to 2019, there was a similar increase in 2025 by 44% and compared to 2010 the increase was much higher by 805%. The lowest number of cruise ships was in the pandemic year (2020) with 10 cruise ships. In the next years there was a continuous increase till 2025 by 1.800%.

In Lasithi the number of cruise ships that arrived in 2025 was 42, having an increase of 5% compared to 2024 when there were 40 cruise ships. Compared to 2019, there was an increase in 2025 by 13,5% and compared to 2013 there was a decrease of 20,8%. The highest number of cruise ships during the period 2010-2025 was recorded in 2014 with 70 cruise ships; on the

contrary the lowest number of cruise ships was in the pandemic year (2020) with no cruise ships. In the next years, the number of cruises was stabilized from 40 to 43.

In Rethymnon the number of cruise ships that arrived in 2025 was 43, which was the highest number of cruise ships during the period 2010-2025, having an increase of 19,4% compared to 2024 when there were 36 cruise ships. Compared to 2019, the increase in 2025 was higher by 79% and compared to 2013 the increase was much higher by 760%. The lowest number of cruise ships was in the pandemic year (2020) with no cruise ships. In the next years, there was a continuous increase till 2025.

Heraklion constituted 51% of the total cruises ships that arrived in Crete in 2025; Chania follows with 34%, and Rethymnon with Lasithi constitute 7,5% each.

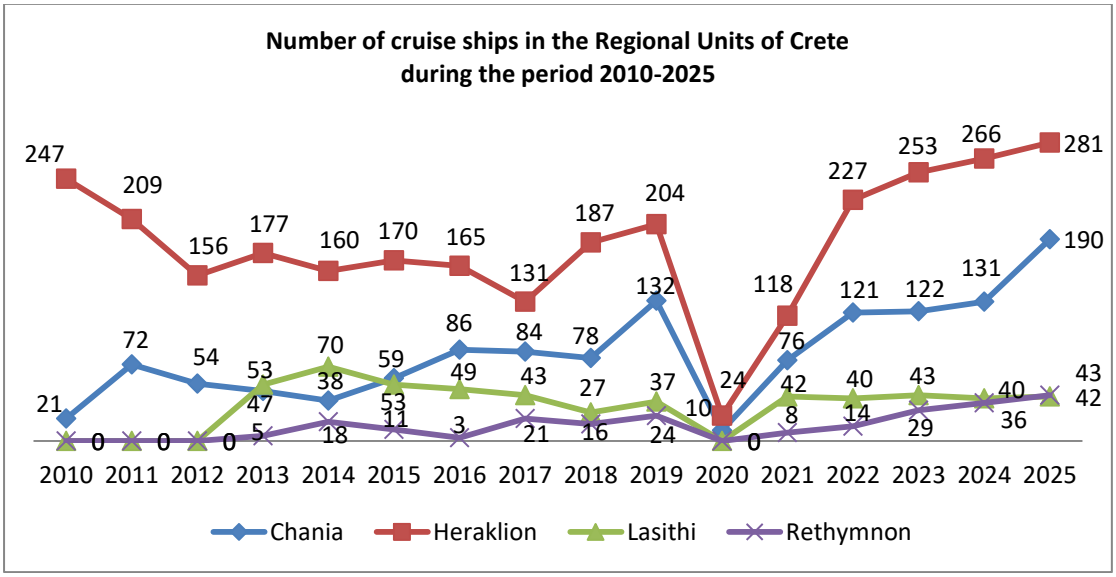


Figure 3.14 Number of cruise ships in the Regional Units of Crete during the period 2010-2025
Source: Hellenic Ports Association, 2026

3.4.1 Arrivals of tourists through cruise ships in Crete and Greece

Passengers of the cruise ships in 2025 in Greece numbered 8.415.713, which was the highest number of arrivals during the period 2013-2025, having an increase of 6,2% compared to 2024 when there were 7.927.709 tourists. Compared to 2019, the increase in 2025 was higher by 52% and compared to 2013 the increase was almost the same by 49%. In 2013 cruise ship passengers were 5.661.889; after some fluctuations they went to 5.552.384 in 2019 and in the pandemic year the number dropped to 67.528. After 2020 there was a continuous increase till 2025 by 12.363%.

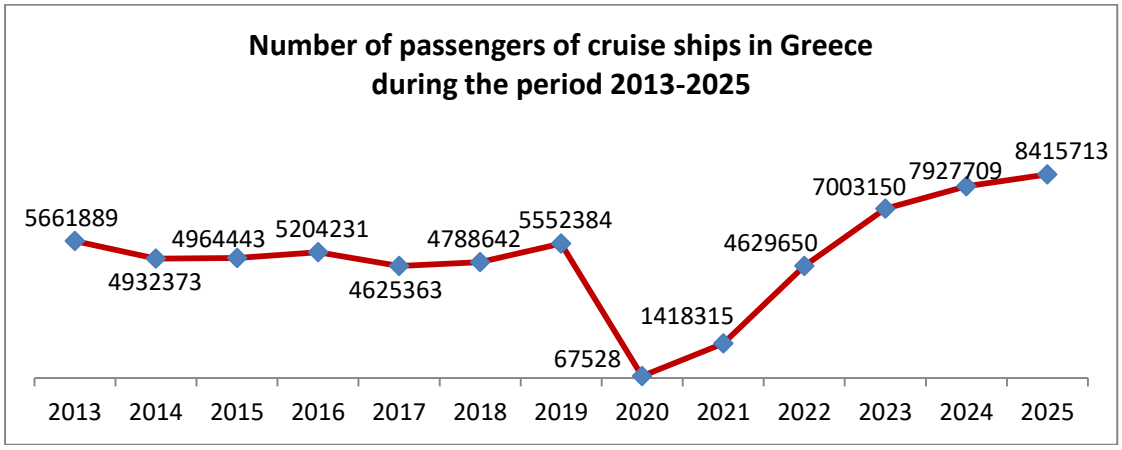


Figure 3.15 Number of passengers of cruise ships in Greece during the period 2013-2025
Source: Hellenic Ports Association, 2026

In Crete in 2025 the number of passengers who came through cruise ships was 984.300, which was the highest number of arrivals during the period 2010-2025, having an increase of 16,5% compared to 2024 when there were 845.163 tourists. Compared to 2019, the increase in 2025 was higher by 62% and compared to 2010 the increase was much higher by 211%. In 2010 cruise ship passengers were 316.509; after some fluctuations they went to 607.268 in 2019 and in the pandemic year the number dropped to 20.103. After 2020 there was a continuous increase till 2025 by 4.796%. Crete constituted 11,7% of the total passengers of cruise ships that arrived in Greece in 2025.

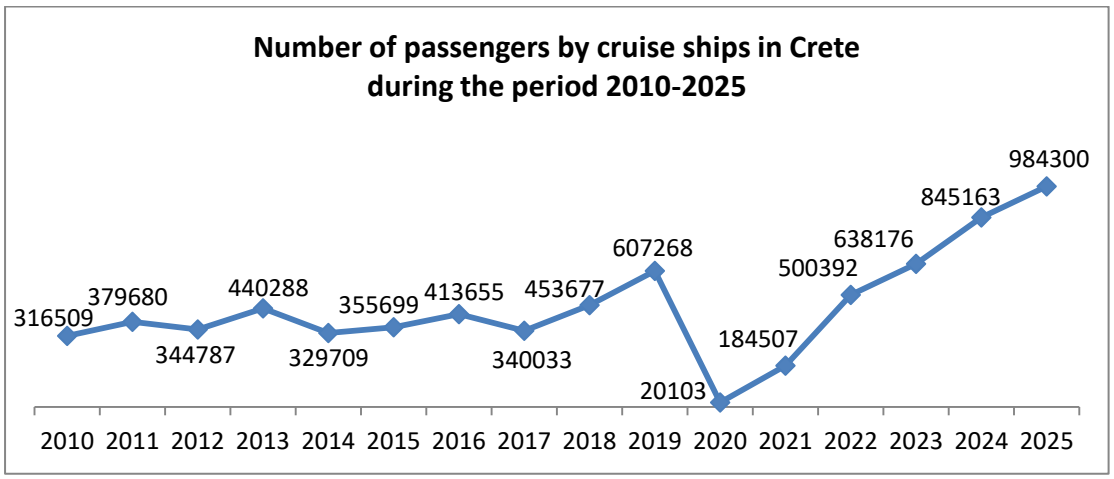


Figure 3.16 Number of passengers of cruise ships in Crete during the period 2013-2025
Source: Hellenic Ports Association, 2026

Concerning the passengers of the cruise ships that arrived in Crete, the Regional Unit of Heraklion received the most passengers throughout the period 2010-2025. In 2025 in

Heraklion the number of cruise ship passengers was 536.543, which was the highest number of passengers during the period 2010-2025, having an increase of 3,5% compared to 2024 when there were 518.575 passengers. Compared to 2019, the increase in 2025 was higher by 75% and compared to 2010 the increase was almost the same by 76%. The lowest number of tourists was in the pandemic year (2020) with 19.998 visitors from cruise ships. In the next years there was a continuous increase till 2025 by 2.583%.

In Chania the number of passengers of cruise ships was 400.047 in 2025, which was the highest number of passengers during the period 2010-2025, having an increase of 43% compared to 2024 when there were 279.754 visitors from cruise ships. Compared to 2019, there was an increase of 50% in 2025 and compared to 2010 the increase was much higher by 3376%. The lowest number of passengers from cruise ships was in the pandemic year (2020) with just 105. In the next years there was a continuous increase till 2025 by 380.897%.

In Lasithi the number of passengers on cruise ships that arrived in 2025 was 44.771, having a marginal decrease of 0,6% compared to 2024 when there were 45.046 passengers on cruise ships. Compared to 2019, there was an increase in 2025 by 38% and compared to 2013 there was a marginal increase of 0,1%. The highest number of passengers on cruise ships during the period 2010-2025 was recorded in 2014 with 49.234 tourists; on the contrary the lowest number was in the pandemic year (2020) with no cruise ships passengers. In the next years the number of cruise ship passengers was increasing, excluding the year 2022.

In Rethymnon the number of passengers on cruise ships that arrived in 2025 was 2.939, having an increase of 64% compared to 2024 when there were 1.788 passengers from cruise ships. Compared to 2019, there was a similar increase as well in 2025 by 66% and compared to 2013 there was a much higher increase of 120%. The highest number of passengers from cruise ships during the period 2010-2025 was recorded in 2014 with 4.220 tourists; on the contrary the lowest number was in the pandemic year (2020) with no passengers from cruise ships. In the next years the number of cruise ship passengers was increasing till 2025.

Heraklion constituted 54,5% of the total passengers of cruise ships that arrived in Crete in 2025; Chania followed with 40,7%, then Lasithi with 4,5% and Rethymnon with 0,3%.

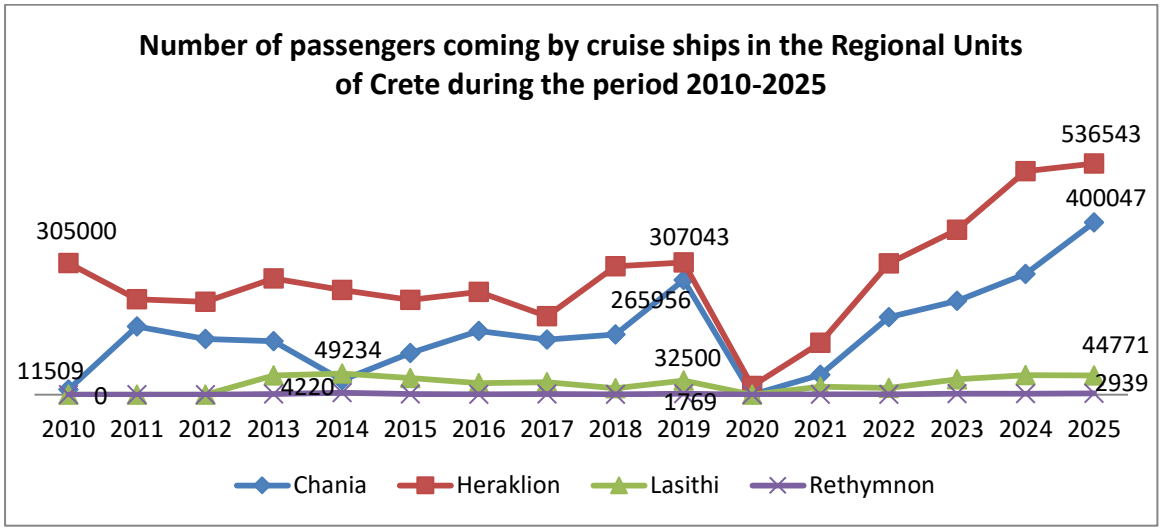


Figure 3.17 Number of passengers coming on cruise ships in the Regional Units of Crete during the period 2010-2025
Source: Hellenic Ports Association, 2026

3.5 Traffic and arrivals of passengers through domestic ships in Crete and Greece

In 2024 in Greece the numbers of arrivals and departures (traffic) of passengers through domestic ships that arrived at the ports was 77.814.728 passengers, which was the highest number recorded during the period 2013 -2024, having an increase of 8,1% compared to 2023 when there were 71.971.364 passengers. Compared to 2019, there was almost the same increase of 8,9% in 2024 and compared to 2013 there was an increase of 9,9%. There was an increase of passengers from 2014 till 2019 and then a severe decrease took place in 2020 with 40.165.522 passengers. In the next years there was a continuous increase till 2024.

In 2024 in Crete traffic numbers of passengers through domestic ships that arrived at the ports was 2.959.903, having an increase of 3,7% compared to 2023 when there were 2.855.026 passengers. Compared to 2019, which recorded the highest number of passengers through domestic ships during the period 2013-2024 with 3.239.893, there was a decrease of 8,6% in 2024 and compared to 2013 there was an increase of 17%. There was an increase of passengers from 2014 till 2019 and then a severe decrease took place in 2020 with 1.466.513 passengers. In the next years there was a continuous increase till 2024.

Crete constituted 3,8% of the total passenger traffic (arrivals and departures) from domestic ships that arrived in Greece in 2024.

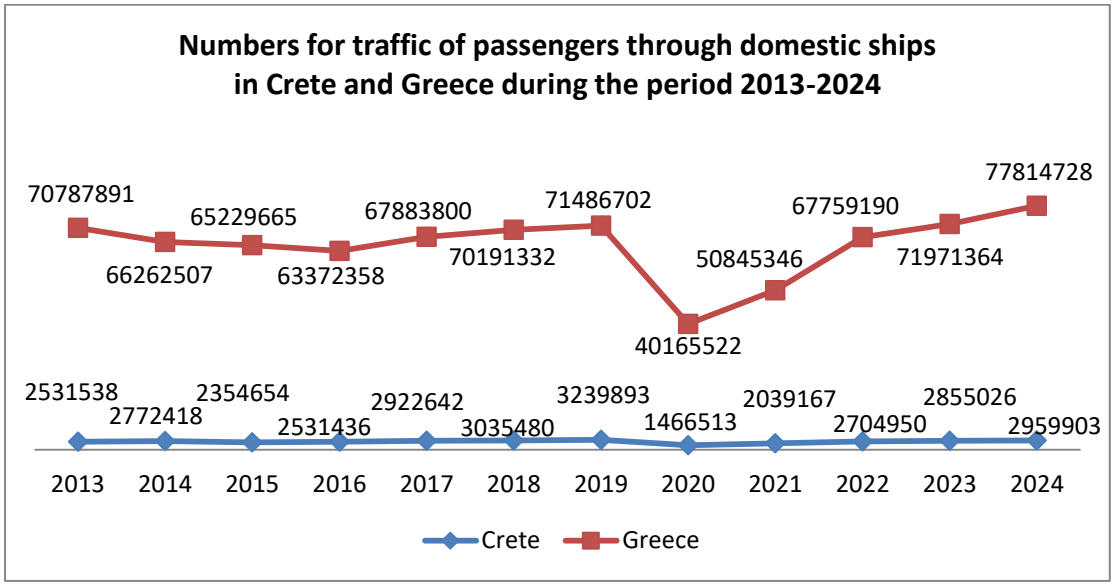


Figure 3.18 Numbers for traffic of passengers through domestic ships in Crete and Greece during the period 2013-2024
Sources: Hellenic Statistical Authority, 2025; INSETE Intelligence, 2025

In 2024 in Crete the number of arrivals of passengers through domestic ships that arrived at the ports was 1.495.443, having an increase of 3,9% compared to 2023 when there were 1.438.628 passengers. Compared to 2019, which recorded the highest number of passengers through domestic ships during the period 2013-2024 with 1.644.122, there was a decrease of 9% in 2024 and compared to 2013 there was an increase of 17,7%. There was an increase of passengers from 2014 till 2019 and then a severe decrease took place in 2020 with 747.062 passengers. In the next years there was a continuous increase till 2024.

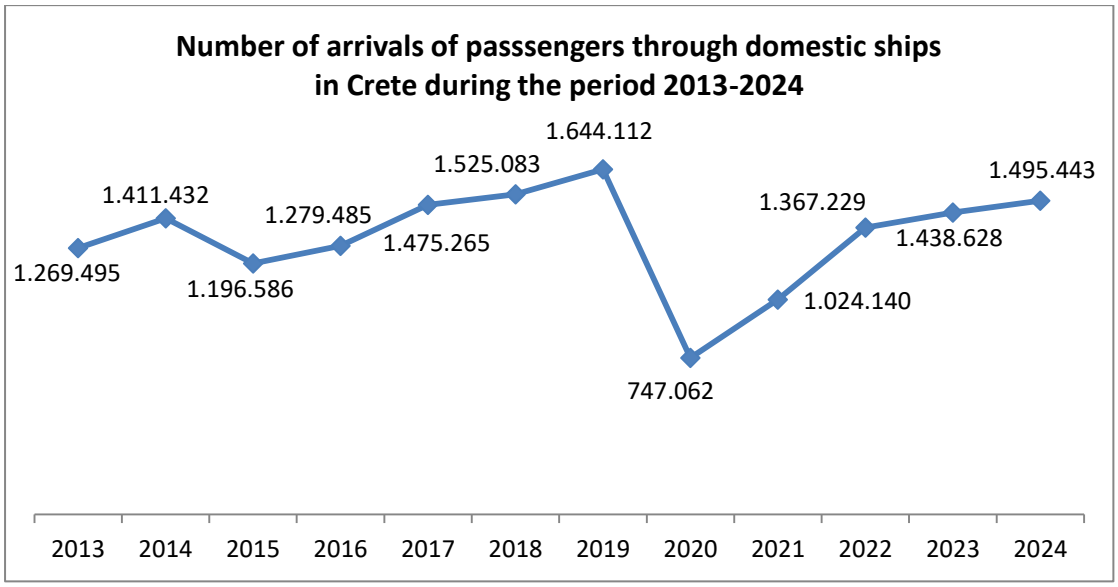


Figure 3.19 Number of arrivals of passengers through domestic ships in Crete during the period 2013-2024
Sources: Hellenic Statistical Authority, 2025; INSETE Intelligence, 2025

Concerning the passenger traffic of the domestic ships that arrived in Crete, the Regional Unit of Heraklion received the most passengers throughout the period 2013-2024. In 2024 in Heraklion the number of passengers of domestic ships was 868.061, having an increase of 5,4% compared to 2023 when there were 823.606 passengers. Compared to 2019, which had the highest number of passengers with 927.894 during the period 2010-2024, there was a decrease of 6,4% in 2024 and compared to 2013 there was an increase by 17%. The lowest number of tourists was in the pandemic year (2020) with 386.144 passengers from domestic ships. In the next years there was a continuous increase till 2024.

In Chania the number of the passengers of the domestic ships was 581.321 in 2024, having an increase of 1,9% compared to 2023 when there were 570.399 passengers of domestic ships. Compared to 2019, which had the highest number of passengers with 673.948 during the period 2013-2024, there was a decrease of 13,7% in 2024 and compared to 2013 there was an increase by 11%. The lowest number of passengers of domestic ships was in the pandemic year (2020) with 345.063 passengers. Over the next two years there was an increase in passenger traffic; after that, during the years 2023-2024 the number stabilized from 570.399 to 581.321.

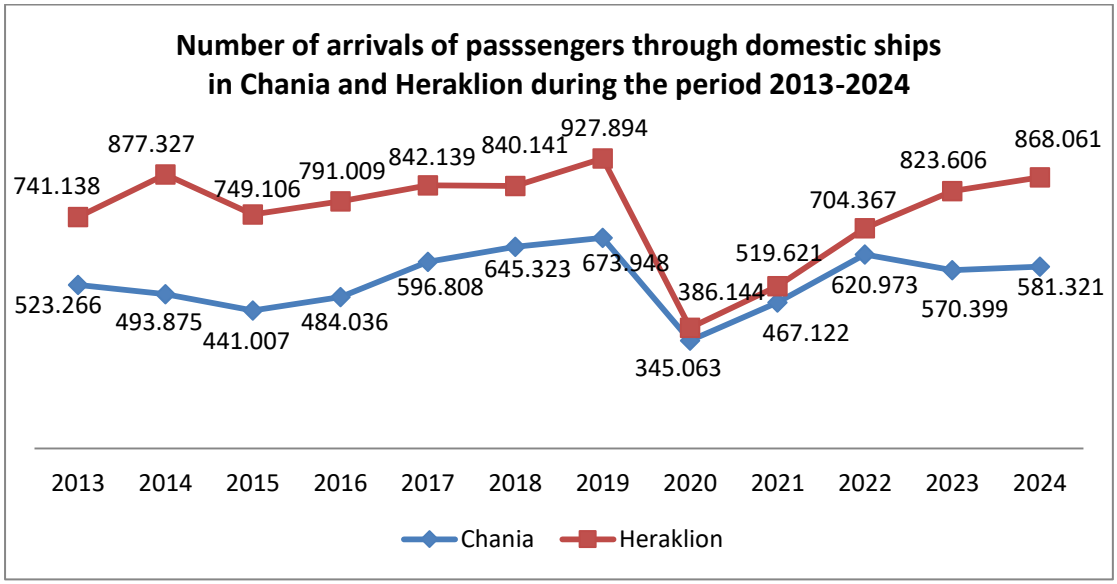


Figure 3.20 Number of arrivals of passengers through domestic ships in Chania and Heraklion during the period 2013-2024
Sources: Hellenic Statistical Authority, 2025; INSETE Intelligence, 2025

In Rethymnon the number of passengers of the domestic ships was 31.533 in 2024, having an increase of 21% compared to 2023 when there were 26.032 passengers from domestic ships.

Compared to 2019, which had the highest number of passengers with 36.804 during the period 2013-2024, there was a decrease of 14,3% in 2024 and compared to 2014 by 11%. The lowest number of passengers of domestic ships was in the pandemic year (2020) with 10.934 passengers, excluding the years 2013 and 2015 in which there was no arrival of passengers through domestic ships. Over the next two years there was an increase of passengers; then, during the years 2023-2024 the number stabilized from 26.032 to 31.533 passengers.

In Lasithi the number of passengers of the domestic ships was 14.528 in 2024, having a decrease of 21,8% compared to 2023 when there were 18.591 passengers of domestic ships and it was the highest number during the period 2013-2024. Compared to 2019, there was an increase of 166% in 2024, and compared to 2013 it increased by 185%. The lowest number of passengers of domestic ships was in 2016 with 4.440 passengers. The passengers somewhat stabilized from 2013 till 2020 and then till 2023 there was an increase of passengers.

Heraklion constituted 58% of the total passengers of domestic ships that arrived in Crete in 2024; Chania followed with 39%, then Rethymnon with 2% and Lasithi with 1%.

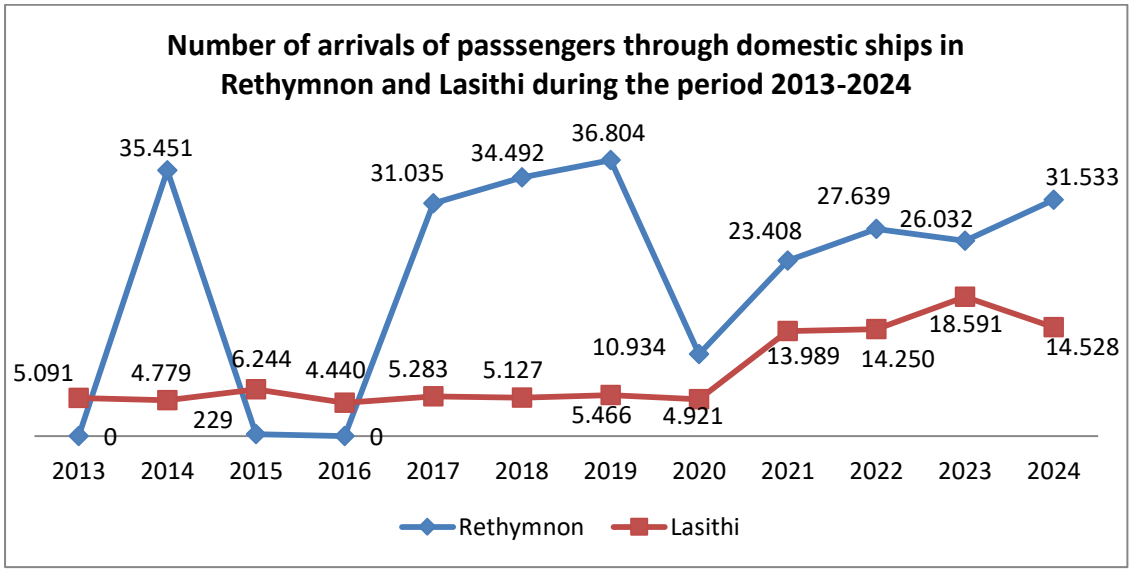


Figure 3.21 Number of arrivals of passengers through domestic ships in Rethymnon and Lasithi during the period 2013-2024
Sources: Hellenic Statistical Authority, 2025; INSETE Intelligence, 2025

3.6 Revenues from foreign visits in Crete and Greece

In 2025 the amount of the revenues coming from foreign visitors who arrived in Greece through flights, road & train network and commercial ships, excluding cruise ships, was 22,6

billion euros, which was the highest amount ever recorded, having an increase of 9,8% compared to 2024 when it was 20,6 billion euros. Compared to 2019, there was an increase in 2025 by 28% and compared to 2016 the increase was higher by 77%. In 2016 the revenues from foreign visitors were 12,7 billion euros and there was an increase of 39% till 2019. An annual decrease took place in the pandemic year 2020 by 76%. From 2020 till 2025 there was a continuous increase in the revenues from foreign visitors in Greece.

In 2025 the amount of the revenues coming from foreign visitors who arrived in Crete through international flights, domestic flights and ships, excluding cruise ships, was 4,3 billion euros, having a decrease of 4,9% compared to 2024 when it was 4,6 billion euros. Compared to 2019, there was an increase in 2025 by 21% and compared to 2016 the increase was higher by 40%. In 2016 the revenues from foreign visits were 3,1 billion euros and there was an increase of 16% till 2019. An annual decrease took place in the pandemic year 2020 by 76%. From 2020 till 2023 there was a continuous increase in the revenues by 503% reaching 5,2 billion euros, which was the highest amount ever recorded. The last two years, there was a continuous decrease by 16%.

In 2025, the revenues coming from foreign visitors in Crete through international flights, domestic flights and ships, excluding cruise ships, constituted 19,2% of the total revenues of all the foreign visitors who arrived in Greece through flights, road and train network, and commercial ships, excluding cruise ships.

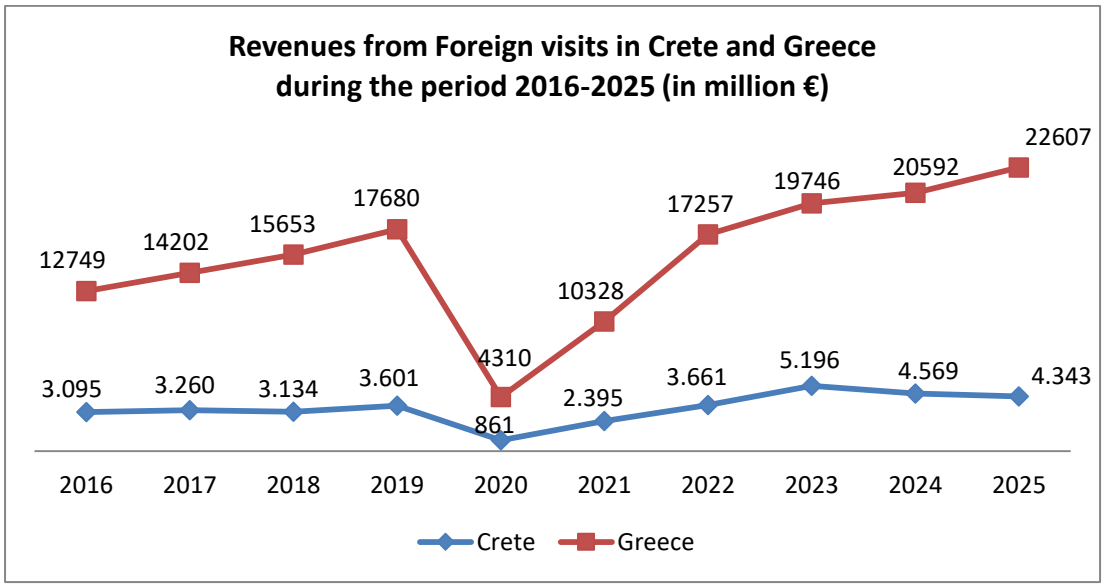


Figure 3.22 Revenues from foreign visitors in Crete and Greece during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.6.1 Revenues from foreign visits per nationality in Crete

In 2025 the amount of revenues coming from the 3 main nationalities (Germans, British, French) constituted the 53% of the total revenues among all the visitor nationalities in Crete. The amount of revenues from German visitors who arrived in Crete through international flights, domestic flights and ships, in 2025 was 1,2 billion euros, having a decrease of 8,5% compared to 2024 when it was 1,3 billion euros. Compared to 2019, there was an increase in 2025 by 21% and compared to 2016 the increase was much higher by 37%. In 2016 revenues from Germans were 860 million euros and there was an increase of 13% till 2019. An annual decrease took place in the pandemic year 2020 by 66%. From 2020 till 2023 there was a continuous increase in the revenues from Germans in Crete by 296, going to 1,3 billion euros which was the highest amount during the period 2016-2025.

In 2025 the amount of the revenues coming from British visitors who arrived in Crete was 735 million euros, having a small decrease of 0,8% compared to 2024 when it was 741 million euros. Compared to 2019, there was an increase in 2024 by 75% and compared to 2016 the increase was higher by 80%. In 2016 revenues from the British were 408 million euros and there was an increase of 3% till 2019. An annual decrease took place in the pandemic year 2020 by 73%. From 2020 till 2023 there was a continuous increase in the revenues from the British in Crete by 747%, reaching the amount of 974 million euros, which was the highest amount during the period 2016-2025.

In 2025 the amount of revenues coming from French visitors who arrived in Crete was 400 million euros, having a decrease of 19% compared to 2024 when it was 492 million euros. Compared to 2019, there was a marginal increase in 2025 by 0,2% and compared to 2016 the increase was higher by 16%. In 2016 the revenues from the French were 346 million euros and there was an increase of 16% till 2019. An annual decrease took place in the pandemic year 2020 by 72%. From 2020 till 2023 there was a continuous increase in the revenues from the French in Crete by 467%, reaching the amount of 624 million euros, which was the highest amount during the period 2016-2025.

In 2025, German revenues constituted 27,1% of the total revenues among all the nationalities in Crete; the British followed with 16,9% and then the French with 9,2%.

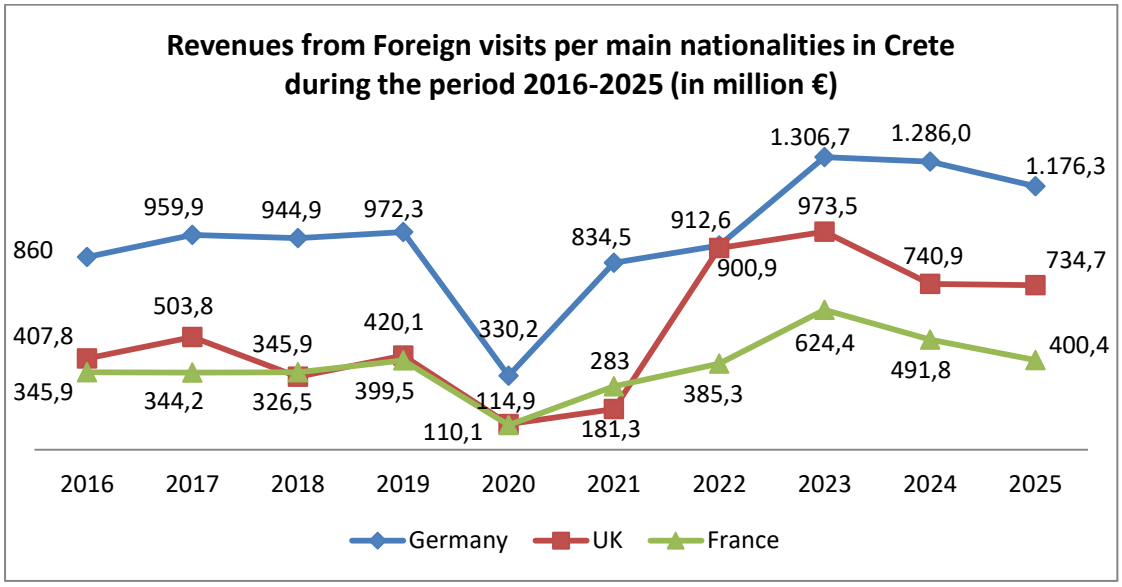


Figure 3.23 Revenues from foreign visitors per main nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

Concerning the other nationalities that arrived in Crete through international flights, domestic flights and ships, in 2025 the amount of revenues coming from Belgian visitors who arrived in Crete was 181 million euros, having a decrease of 4,9% compared to 2024 when it was 191 million euros. Compared to 2019, there was a lower increase in 2025 by 2,8% and compared to 2016 the increase was higher by 32%. In 2016 the revenues from Belgians were 137 million euros and there was an increase of 29% till 2019. An annual decrease took place in the pandemic year 2020 by 85%. From 2020 till 2024 there was a continuous increase in the revenues from Belgians in Crete reaching the amount of 191 million euros, which was the highest amount during the period 2016-2025.

In 2025 the amount of the revenues coming from Italian visitors who arrived in Crete was 153 million euros, having a decrease of 20% compared to 2024 when it was 190 million euros. Compared to 2019, there was an increase in 2025 by 7,9% and compared to 2016 the increase was higher by 22%. In 2016 the revenues from Belgians were 125 million euros and there was an increase of 13% till 2019. An annual decrease took place in the pandemic year 2020 by 84%. From 2020 till 2024 there was a continuous increase in the revenues from Italians in Crete reaching the amount of 190 million euros, which was the highest amount during the period 2016-2025.

In 2025 the amount of the revenues coming from Dutch visitors who arrived in Crete was 153 million euros, having a decrease of 5,6% compared to 2024 when it was 162 million euros. Compared to 2019, there was also a decrease in 2025 by 22% and compared to 2016 the decrease was lower by 11%. In 2016 the Dutch revenues were 173 million euros and there was an increase of 13% till 2019. An annual decrease took place in the pandemic year 2020 by 83%. From 2020 till 2023 there was a continuous increase in the Dutch revenues in Crete by 657%. The highest amount of revenues from Dutch visitors was recorded in 2017 with 256 million euros.

In 2025 the amount of the revenues coming from Swiss visitors who arrived in Crete was 122 million euros, having a decrease of 20% compared to 2024 when it was 133 million euros. Compared to 2019, there was also a decrease in 2025 by 25% and compared to 2016 there was a smaller decrease of 6,6%. In 2016 the Swiss revenues were 130 million euros and there was an increase of 24% till 2019. An annual decrease took place in the pandemic year 2020 by 76%. From 2020 till 2023 there was a continuous increase in the Swiss revenues in Crete by 432%, reaching the amount of 211 million euros, which was the highest amount during the period 2016-2025.

In 2025, Belgian revenues constituted 4,2% of the total revenues among all the nationalities in Crete; followed by the Dutch and Italian with 3,5% each and then the Swiss with 2,8%.

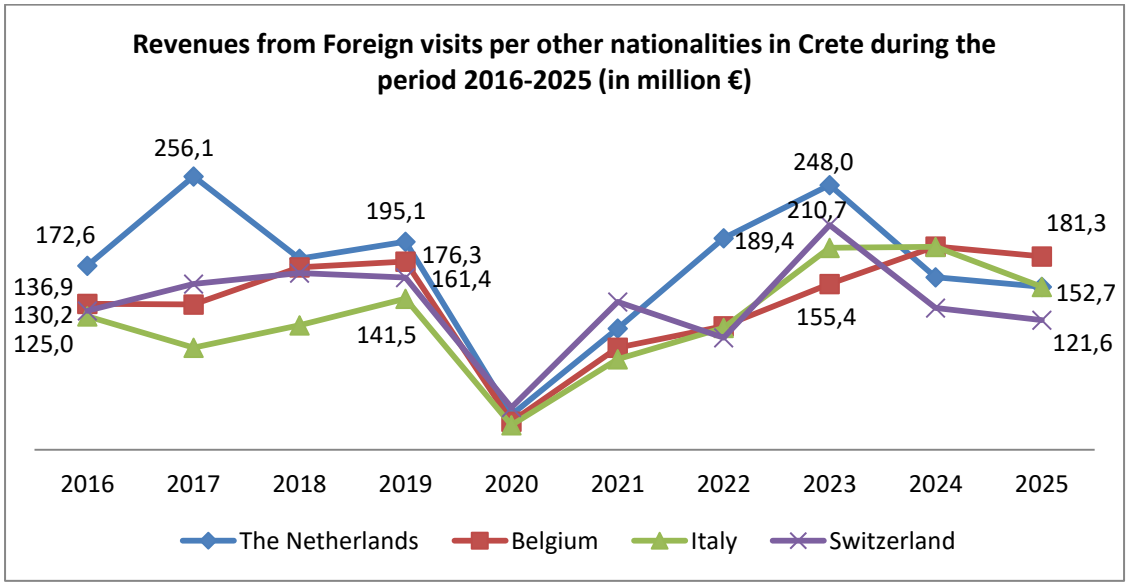


Figure 3.24 Revenues from foreign visits per other nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.7 Overnights of foreign visitors in Crete and Greece

The number of overnights from foreign visitors who arrived in Greece, through flights, road and train network and commercial ships, excluding cruise ships, in 2025 was 233.134 thousands, which was the highest number ever recorded in Greece, having a small increase of 0,9% compared to 2024 when there were 231.038 thousands. Compared to 2019, there was a marginal decrease in 2025 by 0,3% and compared to 2016 there was an increase of 22%. In 2016 the overnights from foreign visitors were 190.402 thousands and there was an increase of 22% till 2019 reaching 232.464 thousands. An annual decrease took place in the pandemic year 2020 by 72%. From 2020 till 2025 there was a continuous increase in the foreign visitor overnights in Greece.

The number of overnights from foreign visitors who arrived in Crete, through international flights, domestic flights and ships, excluding cruise ships, in 2025 was 48.622 thousands, which was the highest number ever, having an increase of 4,1% compared to 2024 when there were 46.706 thousands. Compared to 2019, there was an increase in 2025 by 12% and compared to 2016 the increase was higher by 23%. In 2016 the overnights from foreign visitors were 39.378 thousands and there was an increase of 9,8% till 2019. An annual decrease took place in the pandemic year 2020 by 76%. From 2020 till 2025 there was a continuous increase in the foreign visitor overnights in Crete.

In 2025, foreign overnights of the tourists who came in Crete through international flights, domestic flights and ships, excluding cruise ships, constituted 20,9% of the total overnights in Greece from tourists who came through flights, road and train network, and commercial ships, excluding cruise ships.

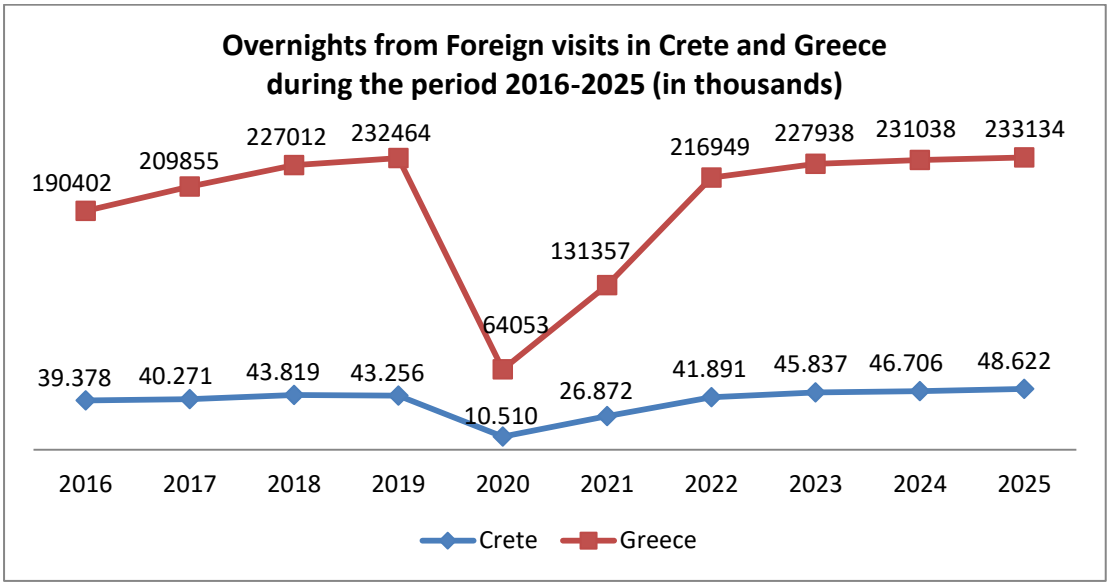


Figure 3.25 Overnights from foreign visitors in Crete and Greece during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.7.1 Overnights of foreign visitors per nationality in Crete

In 2025 the number of the overnights coming from the 3 main nationalities (Germans, British, French) constituted 53% of the total overnights among all the nationalities in Crete. The number of overnights from German visitors who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 13,3 miilions, which was the highest number during the period 2016-2025, having an increase of 2,1% compared to 2024 when there were 13 millions. Compared to 2019, the increase was higher in 2025 by 14% and compared to 2016 the increase was much higher by 34%. In 2016 the overnights from Germans were 9,9 millions and there was an increase of 17% till 2019. An annual decrease took place in the pandemic year 2020 by 68%. From 2020 till 2025 there was a continuous increase in the overnights from Germans in Crete.

The number of overnights from British visitors who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 7,4 millions, having an increase of 5,7% compared to 2024 when there were 7 millions. Compared to 2019, the increase was higher in 2025 by 51% and compared to 2016 the increase was 41%. In 2016 British overnights were 5,3 millions and there was a decrease of 7% till 2019. An annual decrease took place in the pandemic year 2020 by 71%. From 2020 till 2022 there was an increase of 652% reaching the number of

10,7 million overnights which was the highest number recorded during the period 2016-2025 from the British in Crete.

The number of overnights from French visitors who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 4,8 millions having a decrease of 1,2% compared to 2024 when there were 4,9 million overnights. Compared to 2019, there was an increase in 2025 by 6,6% and compared to 2016 the increase was 22%. In 2016 French overnights were 4 millions and there was an increase of 15% till 2019. An annual decrease took place in the pandemic year 2020 by 73%. From 2020 till 2023 there was a continuous increase of 363%, reaching the number of 5,6 million overnights, which was the highest number recorded during the period 2016-2025.

In 2025, German overnights constituted 27,3% of the total overnights among all the nationalities in Crete; the British followed with 15,3% and then the French with 10%.

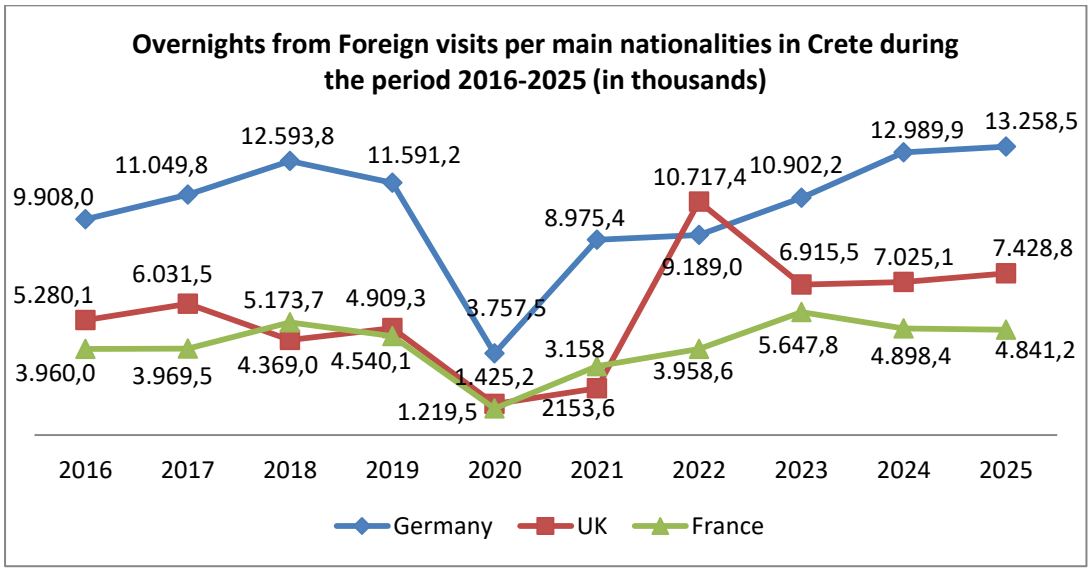


Figure 3.26 Overnights from foreign visitors per main nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

Concerning the other nationalities that arrived in Crete through international flights, domestic flights and ships, the number of overnights from Italian visitors who arrived at the airports of Crete in 2025 was 2,2 millions, which was the highest number during the period 2016-2025, having an increase of 5,5% compared to 2024 when there were 2,1 million overnights. Compared to 2019, there was an increase in 2025 by 15% and compared to 2016 the increase was 19%. In 2016 the overnights from Italians were 1,8 millions and there was

an increase of 2,9% till 2019. An annual decrease took place in the pandemic year 2020 by 83%. From 2020 till 2023 there was a continuous increase of 536%.

The number of overnights from Dutch visitors who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 2,2 millions, having an increase of 14% compared to 2024 when there were 2 million overnights. Compared to 2019, there was a decrease in 2025 by 14% and compared to 2016 the decrease was lower by 9%. In 2016 Dutch overnights were 2,5 millions and there was an increase of 5,8% till 2019. An annual decrease took place in the pandemic year 2020 by 82%. From 2020 till 2023 there was an increase of 466%. The highest number of overnights during the period 2016-2025 was recorded in 2018 with 2,8 millions Dutch overnights in Crete.

The number of overnights from Belgian visitors who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 2,1 millions, having an increase of 12% compared to 2024 when there were 1,9 million overnights. Compared to 2019, there was an increase as well in 2025 by 16% and compared to 2016 the increase was 22%. In 2016 the overnights from Belgians were 1,7 millions and there was an increase of 6% till 2019. An annual decrease took place in the pandemic year 2020 by 82%. From 2020 till 2025 there was a continuous increase. The highest number of overnights during the period 2016-2025 was recorded in 2018 with 2,2 million Belgian overnights in Crete.

The number of overnights from Swiss visitors who arrived at the airports and port of Crete, excluding cruise ships, in 2025 was 1,3 millions, having a decrease of 12% compared to 2024 when there were 1,4 million overnights. Compared to 2019, there was a decrease in 2025 by 17% and compared to 2016 there was a smaller decrease by 3,6%. In 2016 the Swiss overnights were 1,3 millions and there was an increase of 16% till 2019. An annual decrease took place in the pandemic year 2020 by 77%. From 2020 till 2023 there was a continuous increase of 368% reaching to 1,6 million overnights, which was the highest number recorded during the period 2016-2025.

In 2025, the Dutch overnights constituted 4,6% of the total overnights among all the nationalities in Crete; the Italians followed with 4,5%, then the Belgians with 4,4% and the Swiss with 2,6%.

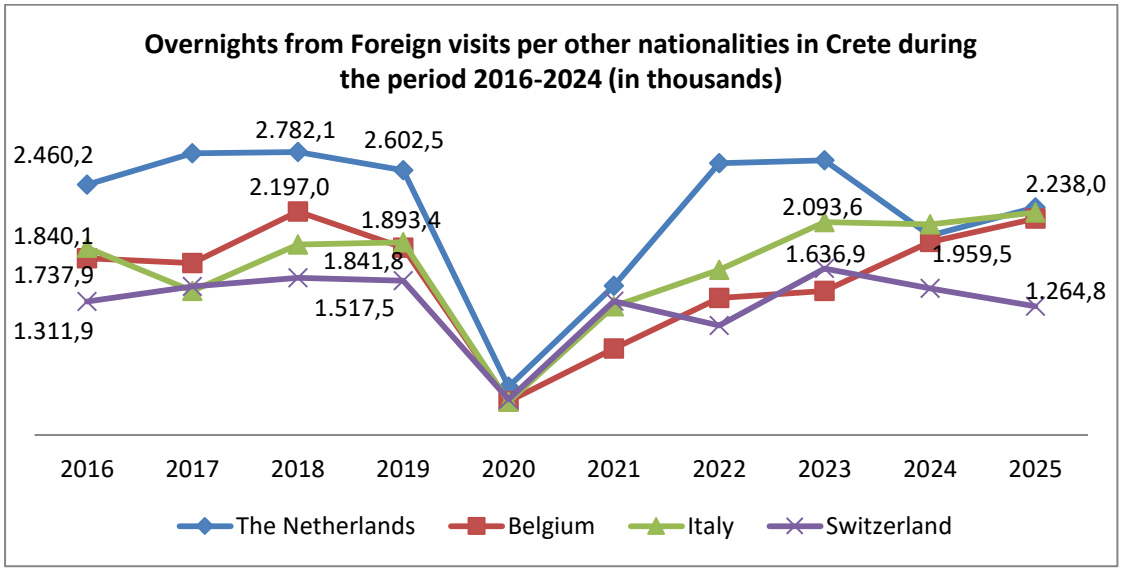


Figure 3.27 Overnights of foreign visitors per other nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.8 Expenditure per visit in Crete and Greece

The amount of expenditure per visitor of foreign visitors who arrived in Greece, through flights, road and train network, and commercial ships, excluding cruise ships, in 2025 was 541 euros, having an increase of 3,4% compared to 2024 when it was 523 euros. Compared to 2019, there was an increase in 2025 by 12% and compared to 2016 the increase was higher by 20%. In 2016 the amount of expenditure per visitor was 449 euros, which was the lowest amount during the period 2016-2025 in Greece and there was a continuous increase of 41% till 2021 reaching the amount of 631 euros, which was the highest amount recorded during the period 2016-2025 in Greece. After that year a continuous decrease took place till 2025 by 14%.

The amount of expenditure per visitor of foreign visitors who arrived in Crete, through international flights, domestic flights and ships, in 2025 was 684 euros, having a decrease of 11% compared to 2024 when it was 767 euros. Compared to 2019, there was a marginal increase in 2025 by 0,4% and compared to 2016 the increase was almost the same by 0,3%. In 2016 the amount of expenditure per visitor was 682 euros, and there was an increase of 38% till 2023 reaching 941 euros, which was the highest amount recorded during the period 2016-2025 in Crete. The lowest amount of expenditure per visitor during the period 2016-2025 was recorded in 2018 with 599 euros.

During the period 2016-2025, the amount of expenditure per visitor of foreign visitors who visited Crete through international flights, domestic flights and ships, was always higher than the amount for foreign visitors who visited Greece through flights, road and train network, and commercial ships. Especially in 2023, the difference peaked at its highest, since in Crete the amount of expenditure per visit was 941 euros while in Greece it was 546 euros, recording the highest difference in the amount among foreign visitors of Crete and Greece during the period 2016-2025.

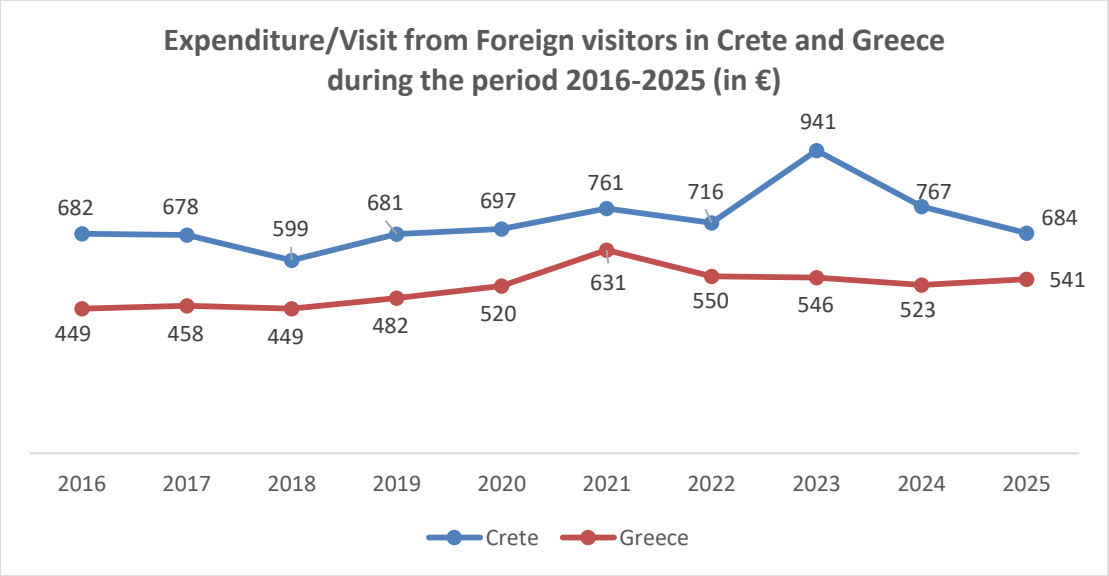


Figure 3.28 Expenditure/Visitor of foreign visitors in Crete and Greece during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.8.1 Expenditure per visitor per nationality in Crete

In 2025 the amount of expenditure per German visitor in Crete who arrived at the airports and ports of Crete, excluding cruise ships, was 695 euros, having a decrease of 14% compared to 2024 when it was 808 euros. Compared to 2019, there was also a decrease in 2025 by 5,5% and compared to 2016 the decrease was higher by 15%. In 2016 the amount of expenditure per visit was 812 euros, and there was an increase of 34% till 2023, reaching to the amount of 1.086 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditure per German visitor was recorded in 2018 with 669 euros.

In 2025 the amount of expenditure per British visitor in Crete who arrived at the airports and ports of Crete, excluding cruise ships, was 819 euros, having a decrease of 3,8% compared to 2024 when it was 819 euros. Compared to 2019, there was an increase in 2025 by 16% and

compared to 2016 the increase was higher by 21%. In 2016 the amount of expenditure per visitor was 675 euros, and there was an increase of 73% till 2023, reaching to the amount of 1.170 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditures per British visitor was recorded in 2018 with 666 euros.

In 2025 the amount of expenditure per French visitor in Crete who arrived at the airports and ports of Crete, excluding cruise ships, was 609 euros, having a decrease of 22% compared to 2024 when it was 781 euros. Compared to 2019, there was a smaller decrease in 2025 by 11% and compared to 2016 the decrease went to 21%. In 2016 the amount of expenditure per visitor was 774 euros, and there was an increase of 21% till 2023, reaching the amount of 932 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditure per British visitor was recorded in 2018 with 556 euros.

Comparing the 3 main nationalities who visited Crete during the period 2016-2025, the highest amount of expenditure per visitor was recorded in 2023 and the lowest amount in 2018 among all the nationalities. The British recorded the highest increase during the period 2016-2024 by 26%, also having the highest amount in 2024 with 851 euros.

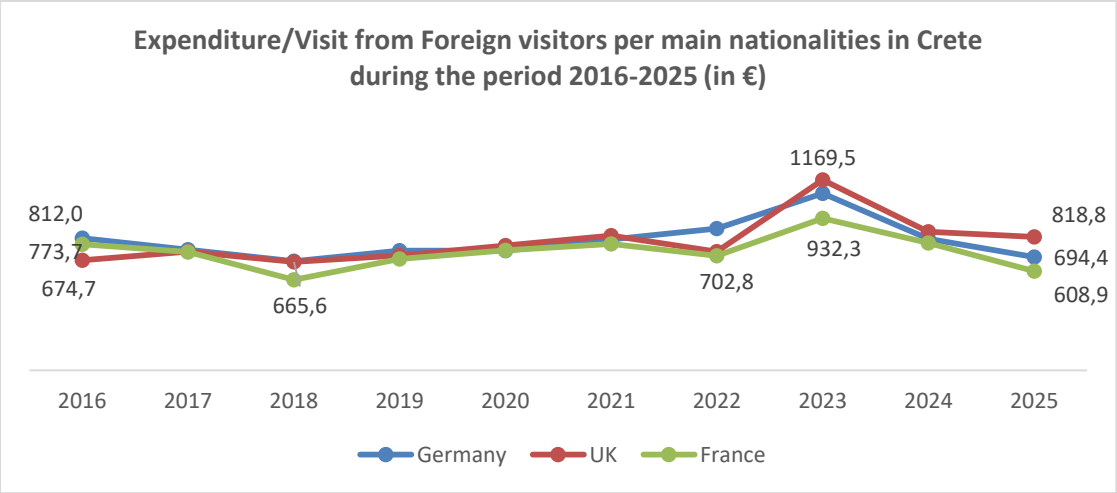


Figure 3.29 Expenditure/Visitor of foreign visitors per main nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

Concerning the other nationalities who arrived in Crete through international flights, domestic flights and ships, the amount of expenditure per Belgian visitor in 2025 was 685 euros, having a decrease of 14% compared to 2024 when it was 797 euros. Compared to 2019, the decrease in 2024 was 18% and compared to 2016 there was a decrease of 7%. In

2016 the amount of expenditure per visitor was 736 euros, and there was an increase of 21% till 2023, reaching to the amount of 891 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditure per visitor was recorded in 2018 with 683 euros.

The amount of expenditure per Swiss visitor in 2025 was 705 euros, which was the lowest amount during the period 2016-2025, having a decrease of 9,6% compared to 2024 when it was 780 euros. Compared to 2019, the decrease was higher in 2025 by 20% and compared to 2016 the decrease was almost the same by 19%. In 2016 the amount of expenditure per visitor was 864 euros, and there was an increase of 46% till 2023, reaching to the amount of 1.264 euros, which was the highest amount during the period 2016-2025 in Crete.

The amount of expenditure per Dutch visitor in 2025 was 527 euros, having a decrease of 26% compared to 2024 when it was 708 euros. Compared to 2019, there was also a decrease in 2025 by 20% and compared to 2016 the increase was the same. In 2016 the amount of expenditure per visitor was 661 euros, and there was an increase of 18% till 2023, reaching the amount of 779 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditure per visitor was recorded in 2018 with 554 euros.

The amount of expenditure per Italian visitor in 2025 was 515 euros, having a decrease of 25% compared to 2024 when it was 689 euros. Compared to 2019, there was a lower decrease in 2025 by 13% and compared to 2016 the decrease was also lower by 5,5%. In 2016 the amount of expenditure per visitor was 558 euros, and there was an increase of 25% till 2023, reaching to the amount of 694 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditure per visitor was recorded in 2018 with 499 euros.

Comparing the above nationalities, all the nationalities in 2025 recorded a decrease compared to 2024. The highest amount of expenditure per visitor was recorded in 2023 and the lowest amount in 2018 among all the nationalities, excluding the Swiss and the Dutch that recorded the lowest amounts in 2025. The Italians recorded the lowest amount in 2025 with 515 euros. On the contrary the highest amount in 2025 was recorded among the Swiss with 705 euros.

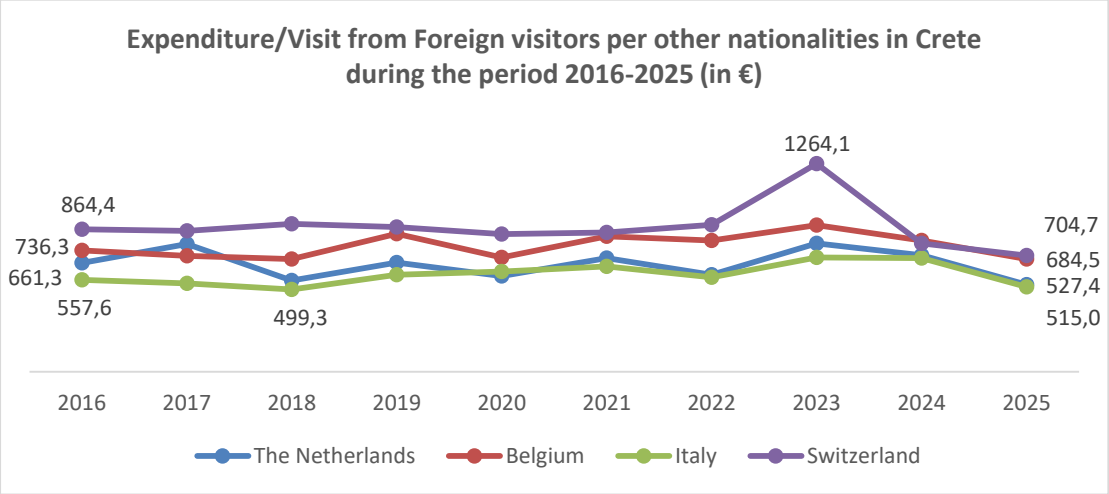


Figure 3.30 Expenditure/Visitor of foreign visitors per other nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.9 Expenditure per overnight in Crete and Greece

The amount of expenditure per overnight of foreign visitors who arrived in Greece, through flights, road and train network, and commercial ships, excluding cruise ships, in 2025 was 97 euros, having an increase of 9% compared to 2024 when it was 89 euros. Compared to 2019, there was an increase in 2025 by 28% and compared to 2016 the increase was higher by 45%. In 2016 the amount of expenditure per overnight was 67 euros, which was the lowest amount during the period 2016-2025 in Greece (also with the same amount in 2020) and there was an increase of 13% till 2019. In the next year there was an annual decrease by 12% and from 2020 till 2025 there was a continuous increase in the amount of foreign expenditures per overnight in Greece.

The amount of expenditure per overnight of foreign visitors who arrived in Crete, through international flights, domestic flights and ships, in 2025 was 89 euros, having a decrease of 9% compared to 2024 when it was 98 euros. Compared to 2019, there was an increase in 2025 by 6,9% and compared to 2016 the increase was higher by 13%. In 2016 the amount of expenditure per overnight was 79 euros, and there was an increase of 44% till 2023, reaching to the amount of 113 euros, which was the highest amount during the period 2016-2025 in Crete. The lowest amount of expenditure per overnight during the period 2016-2025 was recorded in 2018 with 72 euros.

During the period 2016-2025, the amount of expenditure per overnight of foreign visitors who visited Crete through international flights, domestic flights and ships, was always higher than the amount of foreign visitors who visited Greece through flights and by road network, excluding the year 2025. Especially in 2023, the difference peaked at its highest, since in Crete the amount of expenditure per overnight was 113 euros while in Greece it was 87 euros, recording the highest difference in the amount among foreign visitors of Crete and Greece during the period 2016-2025.

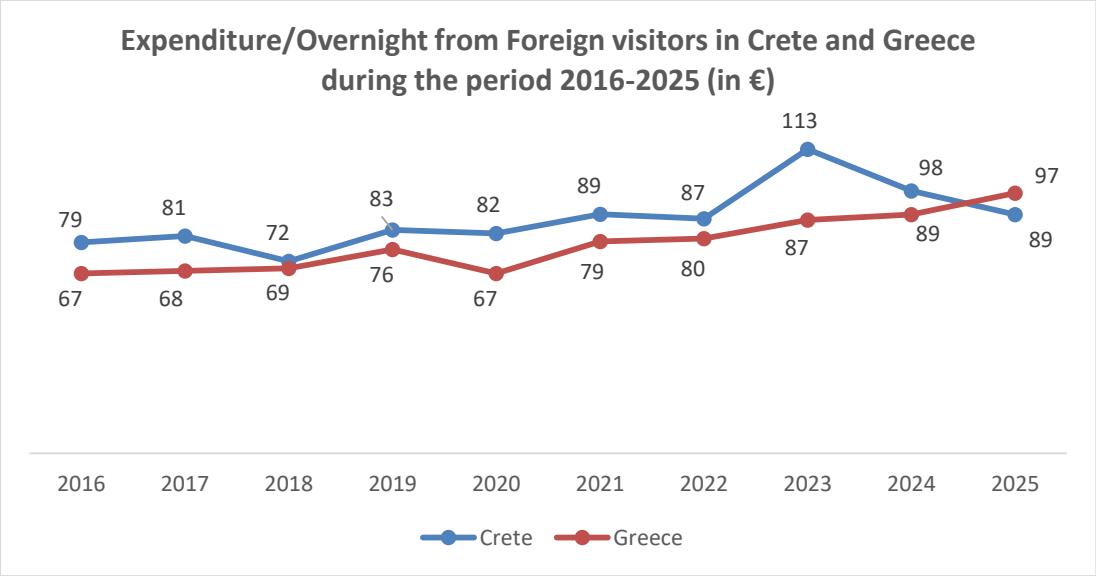


Figure 3.31 Expenditure/Overnight of foreign visitors in Crete and Greece during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.9.1 Expenditure per overnight per nationality in Crete

In 2025 the amount of expenditures per overnight of Germans in Crete who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 89 euros, having a decrease of 10% compared to 2024 when it was 99 euros. Compared to 2019, there was an increase in 2025 by 5,8% and compared to 2016 the increase was lower by 2,2%. In 2016 the amount of expenditure per overnight was 87 euros, and there was an increase of 38% till 2023, reaching the amount of 120 euros, which was the highest during the period 2016-2025 in Crete. The lowest amount of expenditure per German overnight was recorded in 2018 with 75 euros.

In 2025 the amount of expenditure per British overnight in Crete who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 99 euros, having a decrease of 6,2% compared to 2024 when it was 106 euros. Compared to 2019, there was an increase in 2025

by 16% and compared to 2016 the increase was higher by 28%. In 2016 the amount of expenditure per overnight was 77 euros, and there was an increase of 82% till 2023, reaching the amount of 141 euros, which was the highest during the period 2016-2025 in Crete. The lowest amount of expenditure per British overnight was recorded in 2018 with 75 euros.

In 2025 the amount of expenditure per French overnight in Crete who arrived at airports and ports of Crete, excluding cruise ships, in 2025 was 83 euros, having a decrease of 18% compared to 2024 when it was 100 euros. Compared to 2019, there was a lower decrease in 2025 by 6% and compared to 2016 the increase was almost the same. In 2016 the amount of expenditure per overnight was 87 euros, and there was an increase of 27% till 2023, reaching the amount of 111 euros, which was the highest amount during the period 2016-2025. The lowest amount of expenditure per British overnight was recorded in 2018 with 67 euros.

Comparing the 3 main nationalities who visited Crete during the period 2016-2025, the highest amount of expenditure per overnight was recorded in 2023 and the lowest amount in 2018 among all the nationalities. The British recorded the highest increase during the period 2016-2025 by 28%, spending the highest amount as well in 2025 with 99 euros per overnight.

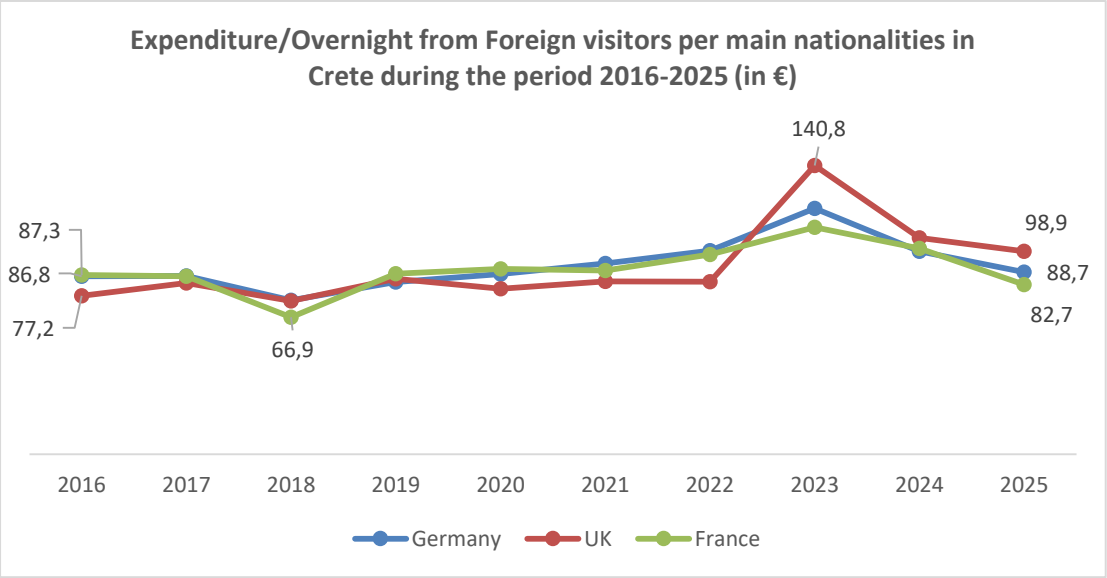


Figure 3.32 Expenditure/Overnight of foreign visitors per main nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

Concerning the other nationalities who arrived in Crete through international flights, domestic flights and ships, the amount of expenditure per Belgian overnight in 2025 was 85

euros, having a decrease of 15% compared to 2024 when it was 101 euros. Compared to 2019, there was a decrease in 2025 by 11% and compared to 2016 there was an increase of 8,2%. In 2016 the amount of expenditure per overnight was 79 euros, and there was an increase of 39% till 2023, reaching to the amount of 110 euros, which was the highest amount during the period 2016-2025. The lowest amount of expenditure per visitor was recorded in 2018 with 78 euros.

The amount of expenditure per Swiss overnight in 2025 was 96 euros, having an increase of 4,4% compared to 2024 when it was 92 euros. Compared to 2019, there was a decrease in 2025 by 10% and compared to 2016 the decrease was lower by 3%. In 2016 the amount of expenditure per overnight was 99 euros, and there was an increase of 30% till 2023, reaching the amount of 129 euros, which was the highest amount during the period 2016-2025. On the other hand, the very next year, the expenditure per overnight went to 92 euros, which was the lowest amount during the period 2016-2025 in Crete, recording a sharp decrease of 28%.

The amount of expenditure per Italian overnight in 2025 was 70 euros, having a decrease of 24% compared to 2024 when it was 92 euros. Compared to 2019, there was a decrease in 2025 by 6,5% and compared to 2016 there was an increase of 2,8%. In 2016 the amount of expenditure per overnight was 68 euros. The lowest amount of expenditure per visit was recorded in 2018 with 62 euros, on the contrary the highest amount of expenditure was recorded in 2024.

The amount of expenditure per Dutch overnight in 2025 was 68 euros, having a decrease of 17% compared to 2024 when it was 83 euros. Compared to 2019, there was a decrease in 2025 by 9% and compared to 2016 the increase was lower by 2,8%. In 2016 the amount of expenditure per overnight was 70 euros, and there was an annual increase of 32% till 2017 reaching 93 euros per overnight, which was the highest amount during the period 2016-2025 in Crete. Then there was an annual decrease of the amount by 30%, going to 64 euros, which was the lowest amount of expenditure per overnight during the period 2016-2025. After that, an increase took place till 2023 by 43%.

Comparing the above nationalities, the highest amount of expenditure per overnight was recorded in 2023 among all the nationalities, excluding Italians who recorded the highest amount in 2024. The lowest amount was also recorded in 2018 among all the nationalities,

excluding the Swiss who recorded the lowest amount in 2024. The Italians recorded the highest increase during the period 2016-2024 by 35%. The highest amount in 2025 was recorded from Swiss with 96 euros, which was the only nationality that an annual incease took place in 2025; on the contrary the lowest amount in 2025 was recorded from the Dutch with 68 euros.

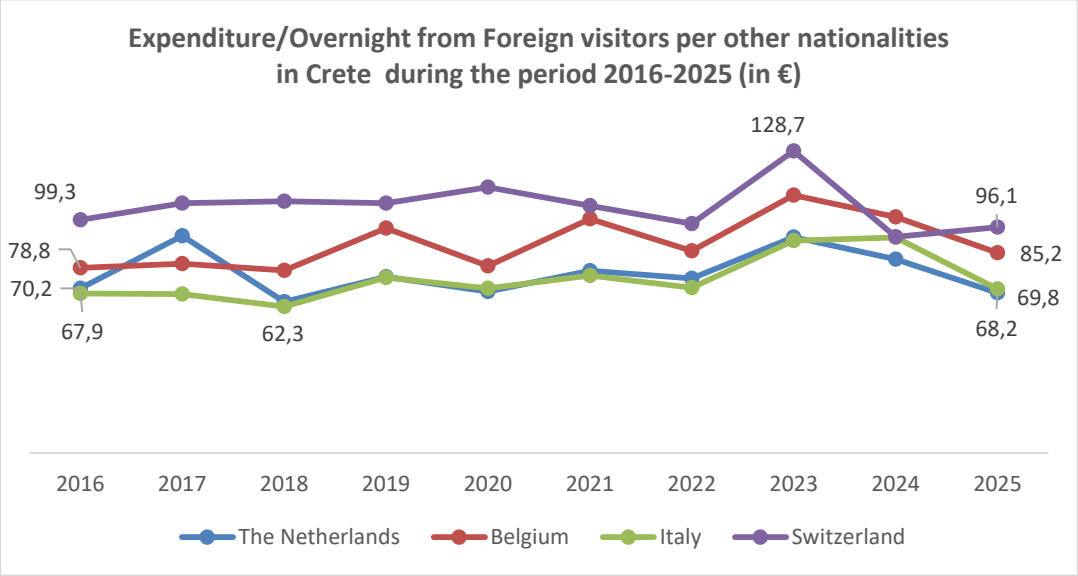


Figure 3.33 Expenditure/Overnight of foreign visitors per other nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.10 Average duration of stay per visit in Crete and Greece

The average duration of stay of foreign visitors who arrived in Greece, through flights, road and train network, and commercial ships, in 2025 was 5,6 days, which was the lowest duration of stay during the period 2016-2025, having a decrease of 5,1% compared to 2024 when it was 5,9 days. Compared to 2019, the decrease was higher in 2025 by 11%, and compared to 2016 the decrease was also higher by 16%. In 2016 the average duration of stay was 6,7 days, which was the highest duration of stay during the period 2016-2025 and there was an increase of 19% till 2021. In the next years till 2025 there was a continuous decrease by 30% of the average duration of stay of foreign visitors who arrived in Greece.

The average duration of stay of foreign visitors who arrived in Crete, through international flights, domestic flights and ships, in 2025, was 7,7 days, which was the lowest duration of stay during the period 2016-2025 having a decrease of 1,8% compared to 2024 when it was 7,8 days. Compared to 2019, the decrease was higher in 2025 by 5,9% and compared to 2016

the decrease was also higher by 11% going to 8,7 days, which was the highest duration of stay during the period 2016-2025.

During the period 2016-2025, the average duration of stay of foreign visitors who visited Crete through international flights, domestic flights and ships, was always higher than the number of foreign visitors who visited Greece through flights and by road network. Especially in 2025, the difference peaked at its highest, since in Crete the average duration of stay was 7,7 days and in Greece it was 5,6 days, recording the highest difference among foreign visitors of Crete and Greece during the period 2016-2025.

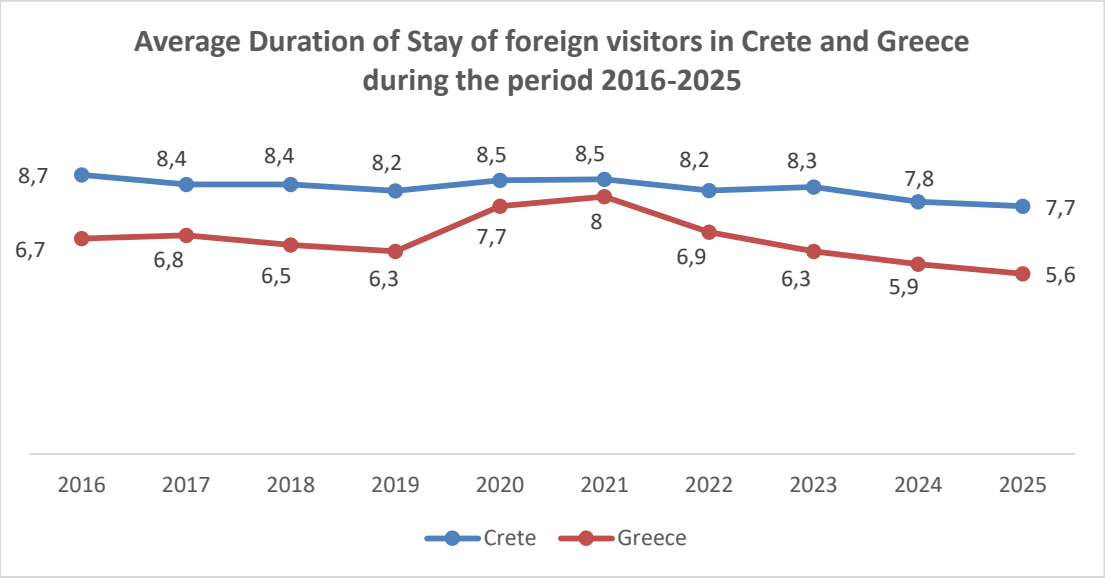


Figure 3.34 Average Duration of Stay of foreign visitors in Crete and Greece during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.10.1 Average duration of stay per visit of nationality in Crete

In 2025 the average duration of stay of Germans per visit in Crete who arrived at the airports and ports of Crete, excluding cruise ships, in 2025 was 7,8 days, which was the lowest number during the period 2016-2025 in Crete, having a decrease of 4,1% compared to 2024 when it was 8,2 days. Compared to 2019, the decrease was higher in 2025 by 11% and compared to 2016 the decrease went to 16% reaching 9,4 days which was the highest duration of stay during the period 2016-2025.

In 2025 the average duration of stay of the British in Crete who arrived at the airports and ports of Crete, excluding cruise ships, was 8,3 days, having an increase of 2,6% compared to

2024 when it was 8,1 days. Compared to 2019, there was a marginal decrease in 2025 by 0,5% and compared to 2016 the decrease was higher by 5,2%. In 2016 the average duration of stay was 8,7 days and there was an increase of 12% till 2021, reaching 9,8 days which was the highest duration of stay during the period 2016-2025. In the next years till 2024 there was a continuous decrease by 18% in the average duration of stay of British visitors who arrived in Crete, going to 8,1 days, which was the lowest number during the period 2016-2025.

In 2025 the average duration of stay of the French in Crete who arrived at the airports and ports of Crete, excluding cruise ships, was 7,4 days, having a decrease of 5,3% compared to 2024 when it was 7,8 days. Compared to 2019, there was no change and compared to 2016 the decrease was higher by 17% reaching 8,9 days, which was the highest duration of stay during the period 2016-2025. The lowest duration of stay during the period 2016-2025 was in 2022 with 7,2 days.

Comparing the 3 main nationalities who visited Crete during the period 2016-2025, the highest average duration of stay was recorded for Germans in 2016 with 9,4 days, for French with 8,9 days on the same year, and for British in 2021 with 9,8 days. On the contrary, the lowest average duration of stay was recorded for Germans in 2025 with 7,8 days, for British in 2024 with 8,1 days and for French in 2022 with 7,2 days. French recorded the highest decrease during the period 2016-2025 by 17%.

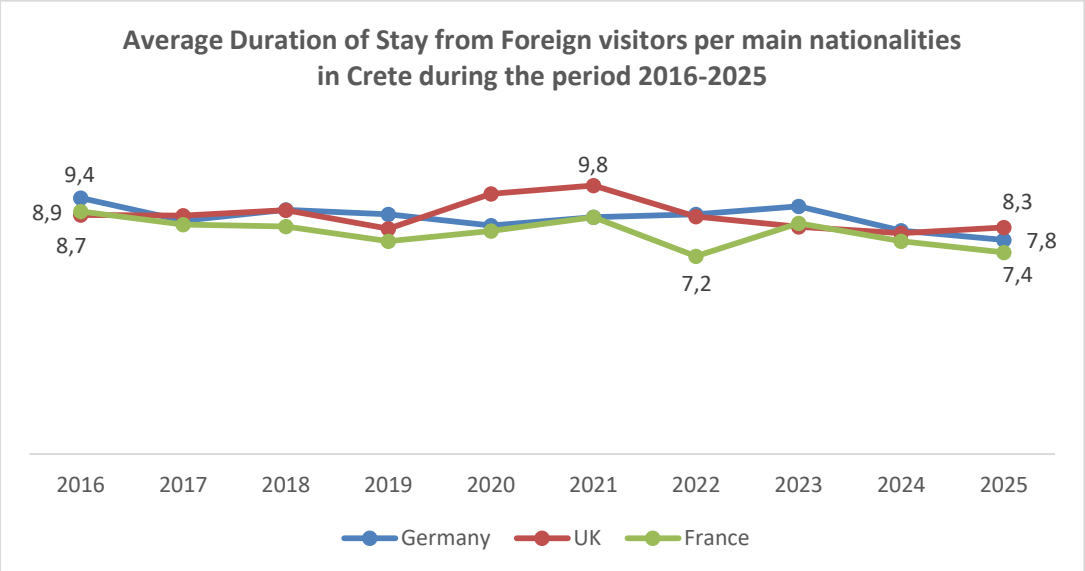


Figure 3.35 Average Duration of Stay of foreign visitors per main nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

Concerning the other nationalities who arrived in Crete through international flights, domestic flights and ships, in 2025 the average duration of stay per visit of the Dutch was 7,7 days, which was the lowest duration of stay during the period 2016-2025, having a decrease of 10% compared to 2024 when it was 8,6 days. Compared to 2019, the decrease in 2025 was 12% and compared to 2016 the decrease was higher by 18% reaching 9,4 days which was the highest duration of stay during the period 2016-2025. From 2016 till 2022 there was a decrease of 16% going down to 7,9 days. Over the next 2 years till 2024 there was a continuous increase by 8,3%.

The average duration of stay of the Swiss in 2025 was 7,3 days, which was the lowest average duration of stay during the period 2016-2025, having a decrease of 13% compared to 2024 when it was 8,5 days. Compared to 2019, there was a decrease in 2025 by 11% and compared to 2016 the decrease went to 16%. In 2016 the average duration of stay was 8,7 days, having a decrease by 15% till 2020, going down to 7,4 days. From 2020 till 2023 there was a continuous increase in the duration of stay by 33%.

The average duration of stay of Belgians in 2025 was 8 days, having an increase of 1,3% compared to 2024 when it was 7,9 days. Compared to 2019, there was a decrease in 2025 by 8,2% and compared to 2016 the decrease was a higher by 14% reaching 9,3 days, which was the highest duration of stay during the period 2016-2025; on the contrary in 2024 the lowest duration of stay was recorded with 7,9 days during the period 2016-2025 in Crete.

The average duration of stay of Italians in 2025 was 7,4 days, which was the lowest duration of stay during the period 2016-2025, having a decrease of 1,7% compared to 2024 when it was 7,5 days. Compared to 2019, the decrease in 2025 was 6,3% and compared to 2016 there was a higher decrease by 10%. In 2016 the average duration of stay was 8,2 days, having an increase of 5% till 2020 reaching 8,7 days, which was the highest duration of stay during the period 2016-2025. From 2020 till 2024 there was a continuous decrease in the average duration of stay by 13%.

Comparing the above nationalities, the highest average duration of stay was recorded in 2023 by the Swiss with 9,8 days; in 2020 by the Italians with 8,7 days, and in 2016 by the Dutch and Belgians with 9,4 and 9,3 days, respectively. On the contrary the lowest average duration of stay was recorded in 2025 by the Swiss, Italians and the Dutch with 7,3, 7,4 and 7,7 days

respectively, and in 2024 by the Belgians with 7,9 days. All the nationalities recorded a decrease during the period 2016-2025; The Belgians recorded the highest average duration of stay in 2025 with 8 days; on the contrary the lowest average duration of stay in 2025 was recorded by the Swiss with 7,3 days.

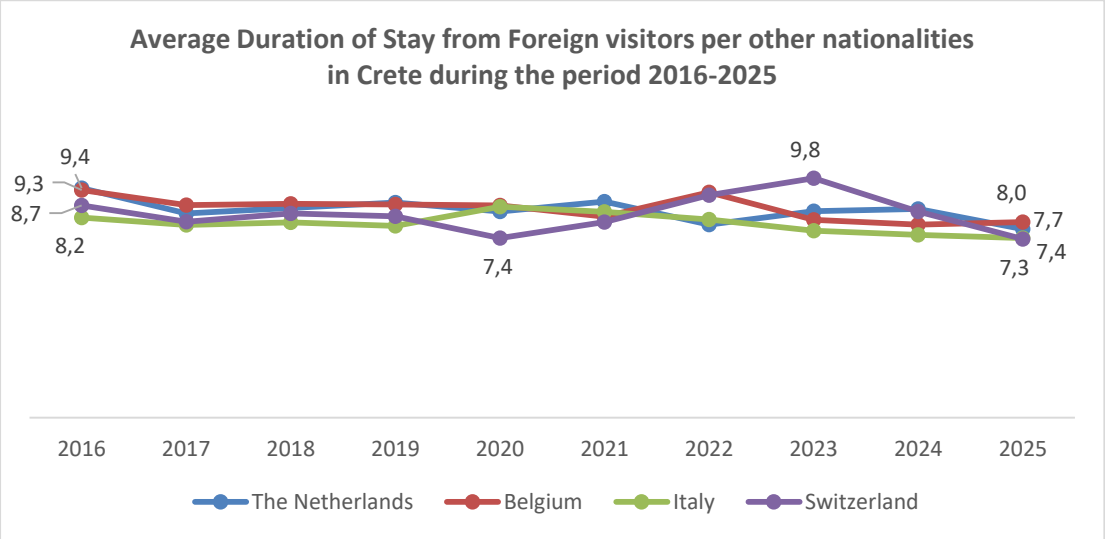


Figure 3.36 Average Duration of Stay of foreign visitors per other nationalities in Crete during the period 2016-2025
Sources: Bank of Greece, Border Research, 2026; INSETE Intelligence, 2026

3.11 Arrivals of visitors at hotel accommodations in Crete and Greece

In Greece, in 2024 there were 29.494.104 arrivals of foreign and domestic visitors at hotel accommodations, which was the highest number of arrivals ever in Greece, having an increase of 3,5% compared to 2023, when there were 28.490.209 arrivals. Compared to 2019, the increase in 2024 was 9% and compared to 2013 the increase in 2024 was much higher by 84%. The arrivals in 2013 were 16.008.948 and till 2019 there was a continuous increase of 69%. Then there was an annual decrease by 70% in the pandemic year with 8.209.962 arrivals and after that year there was a continuous increase till 2024.

In Crete, in 2024 there were 5.424.014 arrivals of foreign and domestic visitors at hotel accommodations, which was the highest number of arrivals ever in Crete, having a marginal increase of 0,9% compared to 2023, which were 5.373.402 arrivals. Compared to 2019, the increase in 2024 was 7,8% and compared to 2013 the increase in 2024 was much higher by 77%. The arrivals in 2013 were 3.066.087 and till 2019 there was a continuous increase of 64%. Then there was an annual decrease by 72% in the pandemic year with 8.209.962 arrivals and then there was a continuous increase till 2024.

In 2024 the arrivals of foreign and domestic visitors of Crete constituted 18,4% of the total visitor arrivals in Greece.

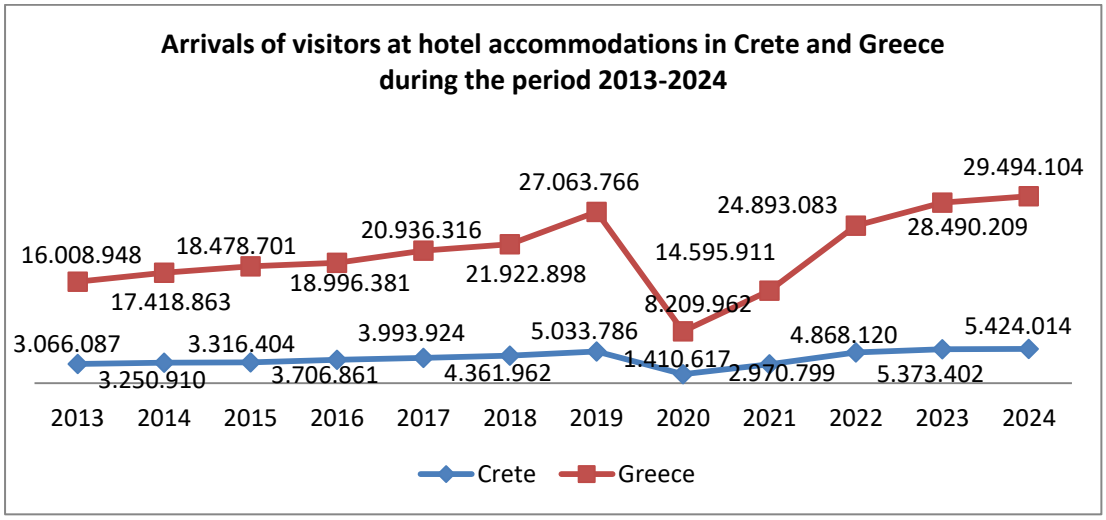


Figure 3.37 Arrivals of visitors at hotel accommodations in Crete and Greece during the period 2013-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.11.1 Arrivals of foreign visitors at hotel accommodations in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2024 there were 2.209.462 arrivals of foreign tourists at hotel accommodations, having a small increase of 1,4% compared to 2023, when there were 2.178.511 arrivals. Compared to 2019, when the highest number of arrivals during the period 2010-2024 was recorded with 1.972.517, the increase in 2024 was 9,5%. Compared to 2010 the increase in 2024 was much higher by 139%. The arrivals in 2010 were 926.174 and till 2019 there was an increase of 118%. Then there was an annual decrease by 68% in the pandemic year with 640.732 arrivals and after that year there was a continuous increase till 2024.

In the Regional Unit of Chania, in 2024 there were 1.206.095 arrivals of foreign tourists at hotel accommodations, having an increase of 5,1% compared to 2023, when there were 1.148.069 arrivals. Compared to 2019, there was a higher increase in 2024 by 8,8% and compared to 2010 the increase in 2024 was much higher by 166%. The arrivals in 2010 were 453.435 and till 2019 there was an increase of 145%. Then there was an annual decrease by 76% in the pandemic year with 268.177 arrivals and after that year, there was a continuous

increase till 2024. The highest number of arrivals of foreign tourists at hotel accommodations was recorded in 2018 with 1.130.579 arrivals.

In the Regional Unit of Rethymnon, in 2024 there were 863.372 arrivals of foreign tourists at hotel accommodations, which was the highest number of foreign arrivals during the period 2010-2024, having a marginal increase of 0,3% compared to 2023, when there were 860.665 arrivals. Compared to 2019, there was an increase in 2024 by 14% and compared to 2010 the increase in 2024 was much higher by 155%. The arrivals in 2010 were 338.688 and till 2019 there was an increase of 124%. Then there was an annual decrease by 78% in the pandemic year with 164.084 arrivals and after that year, there was a continuous increase till 2024.

In the Regional Unit of Lasithi, in 2024 there were 631.309 arrivals of foreign tourists at hotel accommodations, having a decrease of 7,4% compared to 2023, when there were 681.571 arrivals. Compared to 2019, the decrease in 2024 was almost the same by 8,4% and compared to 2010 there was a much higher increase in 2024 by 98%. The arrivals in 2010 were 319.300 and till 2019 there was an increase of 116%. Then there was an annual decrease by 81% in the pandemic year with 128.056 arrivals and after that year, there was a continuous increase till 2023 by 432%. The highest number of arrivals of foreign tourists at hotel accommodations was recorded in 2018 with 774.752 arrivals.

Comparing the arrivals of the Regional Units of Crete, Heraklion constituted 45% of the total foreign arrivals in Crete; Chania followed with 25%, Rethymnon with 17% and Lasithi with 13%.

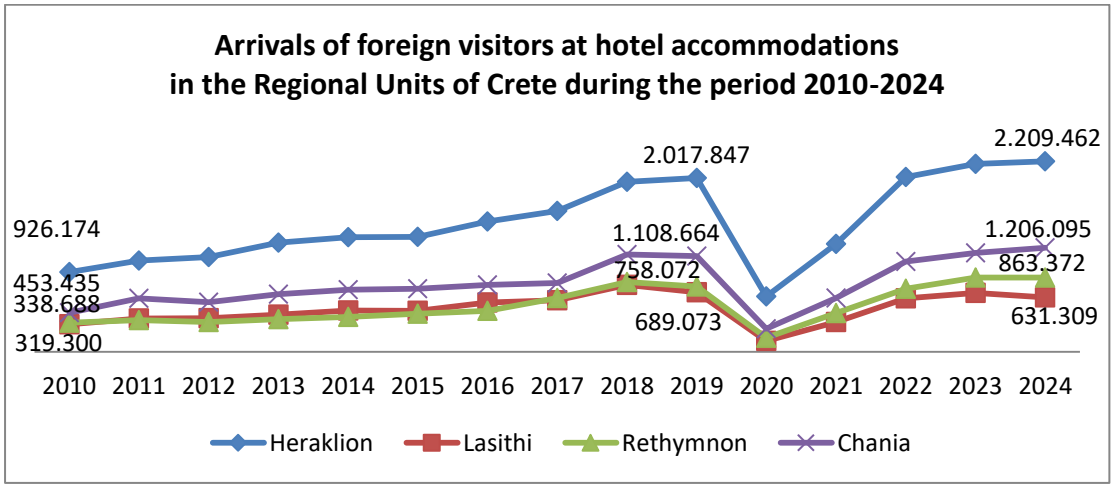


Figure 3.38 Arrivals of foreign visitors at hotel accommodations in the Regional Units of Crete during the period 2010-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.11.2 Arrivals of domestic visitors at hotel accommodations in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2024 there were 202.040 arrivals of domestic tourists at hotel accommodations, having a decrease of 10% compared to 2023, when there were 224.701 arrivals, which was the highest number of domestic arrivals during the period 2010-2024. Compared to 2019, there was an increase in 2024 by 7,2% and compared to 2010 the increase in 2024 was much higher by 47%. The arrivals in 2010 were 137.552 and till 2019 there was an increase of 37%. Then there was an annual decrease by 54% in the pandemic year with 86.195 arrivals and after that year, there was a continuous increase till 2023 by 161%.

In the Regional Unit of Chania, in 2024 there were 152.919 arrivals of domestic tourists at hotel accommodations, which was the highest number of arrivals during the period 2010-2024, having an increase of 8,7% compared to 2023, when there were 140.733 arrivals. Compared to 2019, there was a higher increase in 2024 by 13% and compared to 2010 the increase in 2024 was 10%. The arrivals in 2010 were 139.352 and till 2019 there was a decrease of 2,5%. Then there was a much higher annual decrease by 60% in the pandemic year with 54.686 arrivals and after that year, there was a continuous increase till 2024.

In the Regional Unit of Rethymnon, in 2024 there were 863.372 arrivals of domestic tourists at hotel accommodations, which was the highest number of domestic arrivals during the period 2010-2024, having a marginal increase of 0,3% compared to 2023, when there were 860.665 arrivals. Compared to 2019, there was an increase in 2024 by 14% and compared to 2010 the increase in 2024 was much higher by 155%. The arrivals in 2010 were 338.688 and till 2019 there was an increase of 124%. Then there was an annual decrease by 78% in the pandemic year with 164.084 arrivals and after that year there was a continuous increase till 2024.

In the Regional Unit of Lasithi, in 2024 there were 66.814 arrivals of domestic tourists at hotel accommodations, having an increase of 2,9% compared to 2023, when there were 64.936 arrivals. Compared to 2019, there was a higher increase in 2024 by 14% and compared to 2010 there was a decrease in 2024 by 4,2%. The arrivals in 2010 were 69.760, which was the highest number of arrivals during the period 2010-2024. From 2010 till 2019

there was a decrease of 16%. Then there was a much higher annual decrease by 57% in the pandemic year with 25.604 arrivals and after that year there was a continuous increase till 2024.

Comparing the arrivals of the Regional Units of Crete, Heraklion constituted 39% of the total domestic arrivals in Crete; Chania followed with 30%, Rethymnon with 18% and Lasithi with 13%.

Moreover, in the Regional Unit of Heraklion the arrivals of foreign visitors constituted 91,6% of the total visitor arrivals in Heraklion, whereas the relative percentage of domestic visitors was 8,4%. In the Regional Unit of Chania the arrivals of foreign visitors constituted 88,7% of the total visitor arrivals in Chania, whereas the relative percentage of domestic visitors was 11,3%. In the Regional Unit of Rethymnon the arrivals of foreign visitors constituted 90,4% of the total visitor arrivals in Rethymnon, whereas the relative percentage of domestic visitors was 9,6%. In the Regional Unit of Lasithi the arrivals of foreign visitors constituted 90,4%, of the total visitor arrivals in Lasithi, whereas the relative percentage of domestic visitors was 9,6%.

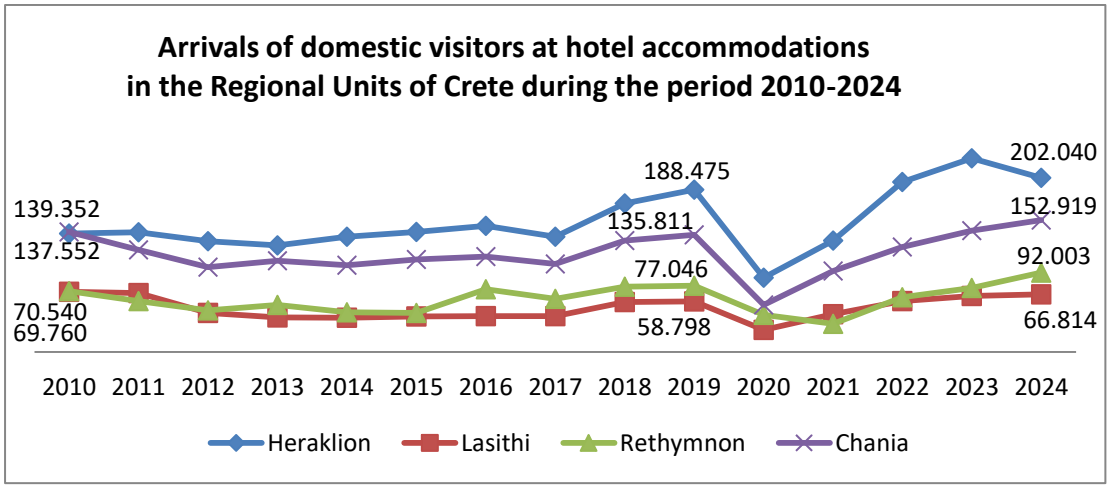


Figure 3.39 Arrivals of domestic visitors at hotel accommodations in the Regional Units of Crete during the period 2010-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.12 Overnights of visitors at hotel accommodations in Crete and Greece

In Greece, in 2024 there were 116.878.400 overnights of foreign and domestic visitors at hotel accommodations, which was the highest number of overnights ever in Greece, having an increase of 3,9% compared to 2023, when there were 112.497.629 overnights. Compared

to 2019, the increase in 2024 was 7% and compared to 2013 the increase in 2024 was much higher by 67%. The overnights in 2013 were 70.065.554 and till 2019 there was a continuous increase of 56%. Then there was an annual decrease by 72% in the pandemic year with 30.376.164 overnights and after that year there was a continuous increase till 2024.

In Crete, in 2024 there were 28.949.170 overnights of foreign and domestic visitors at hotel accommodations, having a marginal decrease of 0,3% compared to 2023, when there were 29.029.567 overnights, which was the highest number of overnights ever in Greece. Compared to 2019, the increase in 2024 was 3,5% and compared to 2013 the increase in 2024 was much higher by 44%. The overnights in 2013 were 20.101.304 and till 2019 there was a continuous increase of 39%. Then there was an annual decrease by 75% in the pandemic year with 8.209.962 overnights and after that year there was a continuous increase till 2023 by 310%.

In 2024 the overnights of foreign and domestic visitors of Crete constituted 24,8% of the total overnights of visitors in Greece.

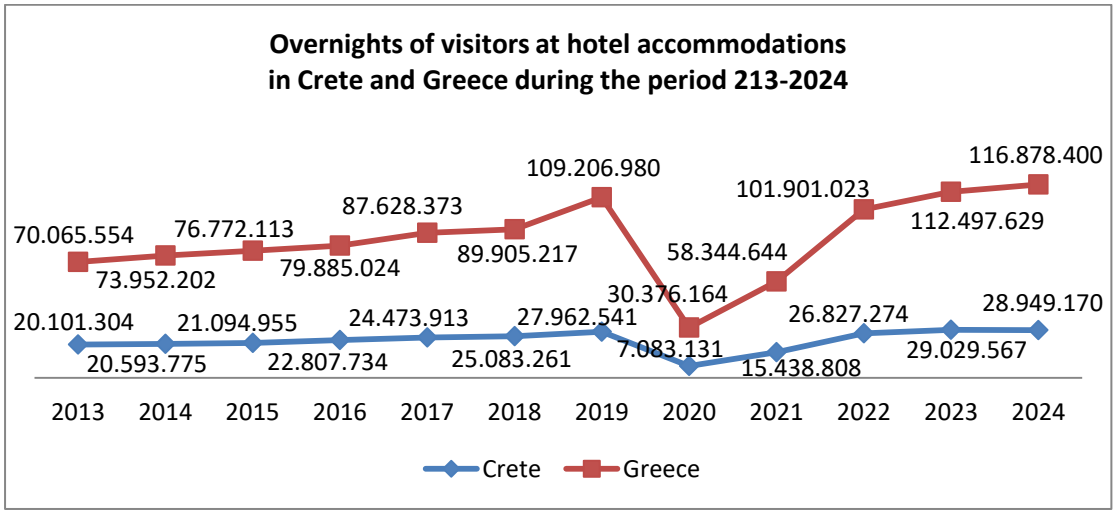


Figure 3.40 Overnights of visitors at hotel accommodations in Crete and Greece during the period 2013-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.12.1 Overnights of foreign visitors at hotel accommodations in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2024 there were 12.215.787 overnights of foreign tourists at hotel accommodations, having a small decrease of 1,5% compared to 2023, when there were 12.215.478 overnights. Compared to 2019, the increase in 2024 was 2,1% and

compared to 2010 the increase in 2024 was much higher by 77%. The overnights in 2010 were 6.889.638 and till 2019 there was an increase of 74%. Then there was an annual decrease by 71% in the pandemic year with 3.470.962 overnights and after that year there was a continuous increase till 2023 by 257%.

In the Regional Unit of Chania, in 2024 there were 6.835.978 overnights of foreign tourists at hotel accommodations, having an increase of 2,4% compared to 2023, when there were 6.675.377 overnights. Compared to 2019, the increase in 2024 was almost the same by 2,1% and compared to 2010 the increase in 2024 was much higher by 107%. The overnights in 2010 were 3.304.821 and there was an increase of 103% till 2019. Then there was an annual decrease by 79% in the pandemic year with 1.409.835 overnights and after that year there was a continuous increase till 2024.

In the Regional Unit of Rethymnon, in 2024 there were 5.058.762 overnights of foreign tourists at hotel accommodations, having an increase of 4,6% compared to 2023, when there were 4.836.282 overnights. Compared to 2019, the increase in 2024 was 11% and compared to 2010 the increase in 2024 was much higher by 77%. The overnights in 2010 were 2.864.703 and there was an increase of 59% till 2019. Then there was an annual decrease by 79% in the pandemic year with 948.084 overnights and after that year there was a continuous increase till 2024.

In the Regional Unit of Lasithi, in 2024 there were 3.457.415 overnights of foreign tourists at hotel accommodations, having a decrease of 8,3% compared to 2023, when they were 3.771.337 overnights. Compared to 2019, the decrease in 2024 was 2,8% and compared to 2010 there was an increase in 2024 by 69%. The overnights in 2010 were 2.048.262 and there was an increase of 74% till 2019. Then there was an annual decrease by 79% in the pandemic year with 732.206 overnights and after that year there was a continuous increase by 42% till 2023.

Comparing the overnights of the Regional Units of Crete, Heraklion constituted 44% of the total foreign overnights in Crete; Chania followed with 25%, Rethymnon with 18% and Lasithi with 13%.

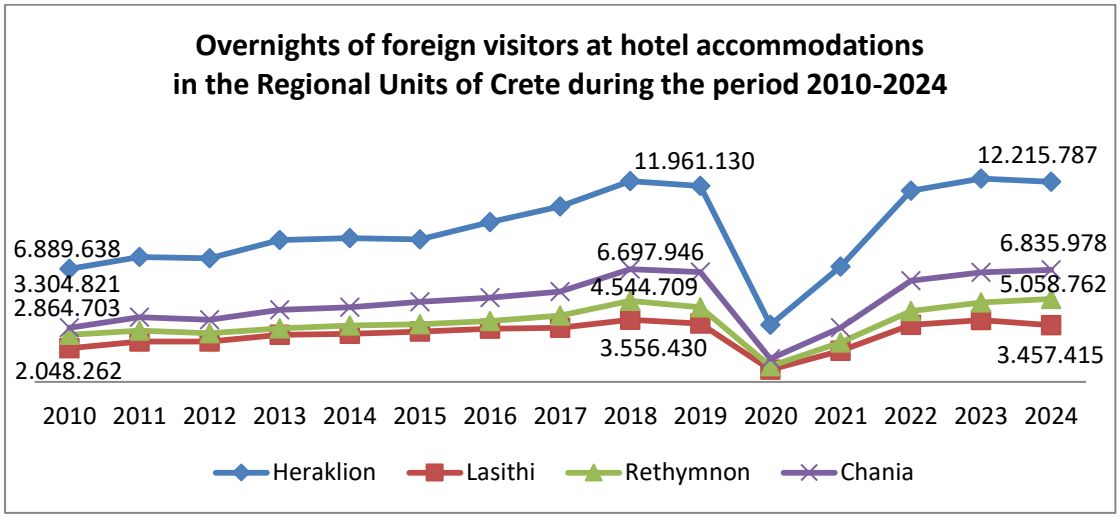


Figure 3.41 Overnights of foreign visitors at hotel accommodations in the Regional Units of Crete during the period 2010-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.12.2 Overnights of domestic visitors at hotel accommodations in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2024 there were 497.836 overnights of domestic tourists at hotel accommodations, having a decrease of 11% compared to 2023, when they were 558.114 overnights, which was the highest number of arrivals during the period 2010-2024. Compared to 2019, the increase in 2024 was 8,2% and compared to 2010 the increase in 2024 was much higher by 34%. The overnights in 2010 were 371.021 and there was an increase of 24% till 2019. Then there was an annual decrease by 58% in the pandemic year with 191.652 overnights and after that year there was a continuous increase by 191% till 2023.

In the Regional Unit of Chania, in 2024 there were 437.989 overnights of domestic tourists at hotel accommodations having an increase of 15% compared to 2023, when they were 381.687 overnights. Compared to 2019, the increase in 2024 was 18% and compared to 2010 there was a decrease of 7,3%. The overnights in 2010 were 472.648 which was the highest number of arrivals during the period 2010-2024. From 2010 till 2029 there was a decrease of 21% and a much higher annual decrease by 59% took place in the pandemic year with 153.935 overnights and after that year there was a continuous increase till 2024.

In the Regional Unit of Rethymnon, in 2024 there were 283.640 overnights of domestic tourists at hotel accommodations, which was the highest number of arrivals during the period 2010-2024, having an increase of 20% compared to 2023, when they were 236.537

overnights. Compared to 2019, the increase in 2024 was 27% and compared to 2010 the increase in 2024 was 13%. The overnights in 2010 were 472.648 and there was a decrease of 11% till 2019. Then there was a much higher annual decrease by 48% in the pandemic year with 117.057 overnights and after that year there was a continuous increase till 2024.

In the Regional Unit of Lasithi, in 2024 there were 161.763 overnights of domestic tourists at hotel accommodations, having a small decrease of 1,8% compared to 2023, when there were 164.755 overnights. Compared to 2019, there was an increase in 2024 by 11% and compared to 2010 there was a decrease in 2024 by 26%. The overnights in 2010 were 218.824 which was the highest number of arrivals during the period 2010-2024 and there was a decrease of 34% till 2019. Then there was a higher annual decrease by 59% in the pandemic year with 59.400 overnights and after that year there was a continuous increase by 177% till 2023.

Comparing the overnights of the Regional Units of Crete, Heraklion constituted 36% of the total domestic overnights in Crete; Chania followed with 32%, Rethymnon with 20% and Lasithi with 12%.

Moreover, in the Regional Unit of Heraklion the overnights of foreign visitors constituted 96,1% of the total visitor arrivals in Heraklion, whereas the relative percentage of domestic visitors was 3,9%. In the Regional Unit of Chania, the overnights of foreign visitors constituted 94% of the total visitor arrivals in Chania, whereas the relative percentage of domestic visitors was 6%. In the Regional Unit of Rethymnon the overnights of foreign visitors constituted 94,7% of the total visitor arrivals in Rethymnon, whereas the relative percentage of domestic visitors was 5,3%. In the Regional Unit of Lasithi the overnights of foreign visitors constituted 95,5% of the total visitor arrival sin Lasithi, whereas the relative percentage of domestic visitors was 4,5%.

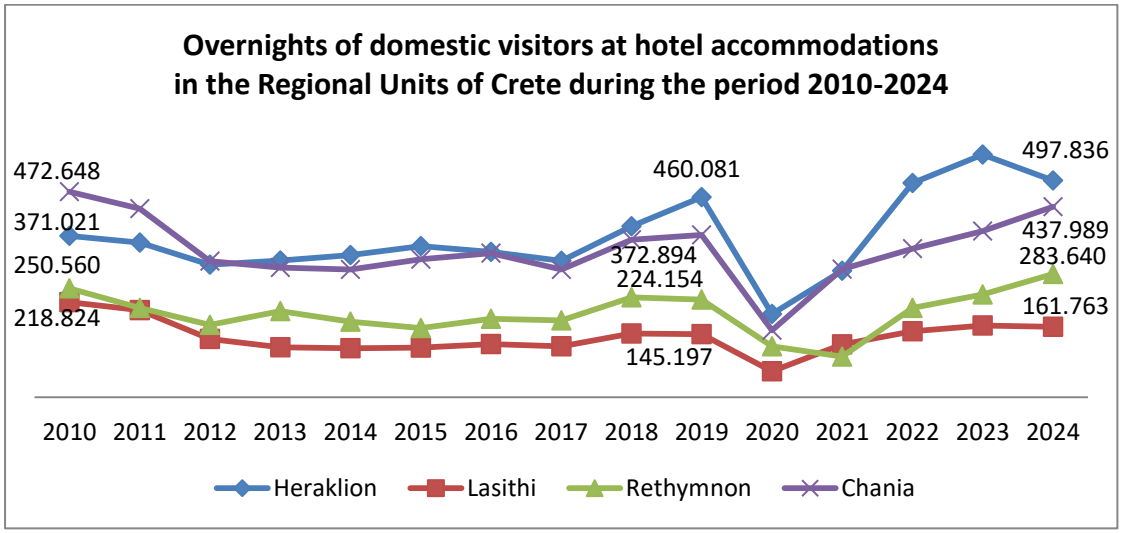


Figure 3.42 Overnights of domestic visitors at hotel accommodations in the Regional Units of Crete during the period 2010-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.13 Occupancy at hotel accommodations in Crete and Greece

In Greece, in 2024 the occupancy of hotel accommodations from foreign and domestic visitors was 51%, having a decrease of 4 units compared to 2023, when it was 55%, which was the highest occupancy in Crete during the period 2013-2024. Compared to 2019, there was an increase in 2024 by 2 units and compared to 2013 the increase was 6 units. The occupancy in 2013 was 45% and till 2018 there was an increase of 8 units. In 2020 there was an annual decrease from 2019 by 19 units and then from 2020 till 2023 there was a continuous increase by 25 units.

In Crete, in 2024 the occupancy of hotel accommodations from foreign and domestic visitors was 54%, having a decrease of 9 units compared to 2023, when it was 63%. Compared to 2019, there was a decrease in 2024 by 3 units and compared to 2013 the decrease was 7 units. The occupancy in 2013 was 61% and till 2017 there was an increase of 6 units reaching 67%, which was the highest occupancy in Crete during the period 2013-2024. In 2020 there was an annual decrease from 2019 by 21 units and then from 2020 till 2023 there was a continuous increase by 27 units.

During the period 2013-2024, the occupancy of foreign and domestic visitors at hotel accommodations was always higher in Crete than in Greece. The highest difference was

recorded in 2013 by 16 units, since the occupancy in Crete was 61% and the respective occupancy in Greece was 45%.

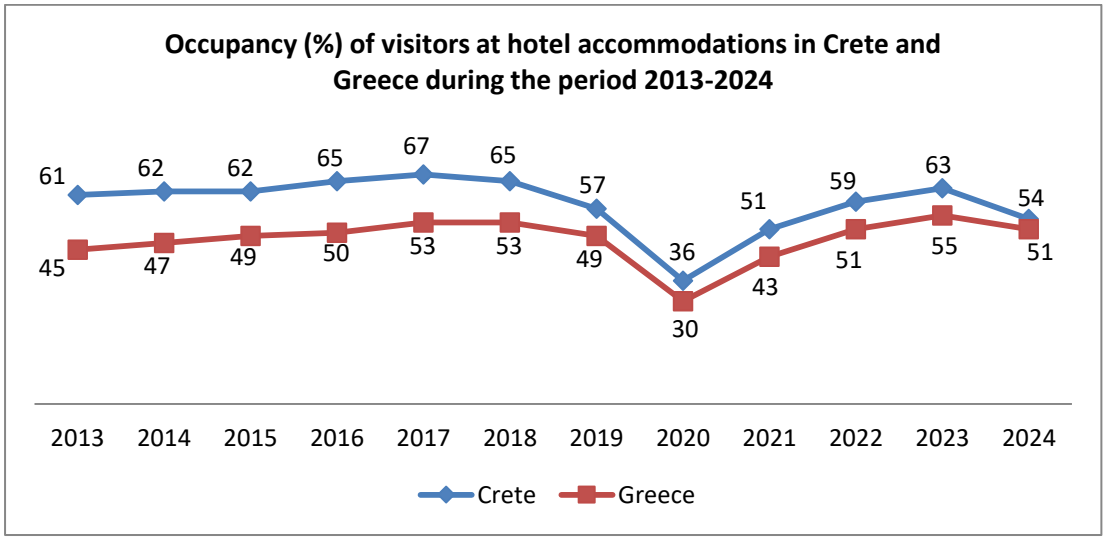


Figure 3.43 Occupancy of visitors at hotel accommodations in Crete and Greece during the period 2013-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

3.13.1 Occupancy at hotel accommodations in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2024 the occupancy of the hotel accommodations from foreign and domestic visitors was 55,8%, having a decrease of 13,5 units compared to 2023, when it was 69,3%. Compared to 2019, there was a lower decrease in 2024 by 5,1 units and compared to 2010 the decrease was 7,2 units. The occupancy in 2010 was 63% and till 2017 there was an increase of 9,2 units reaching 72,2%, which was the highest occupancy at hotel accommodations during the period 2010-2014. Then there was a decrease by 28,8 units till 2020 going down to 43,4%, which was the lowest occupancy at hotel accommodations during the period 2010-2024. Then from 2020 till 2023 there was a continuous increase by 25,9 units.

In the Regional Unit of Chania, in 2024 the occupancy of the hotel accommodations from foreign and domestic visitors was 52,8%, having a decrease of 6,3 units compared to 2023, when it was 59,1%. Compared to 2019, there was a lower decrease in 2024 by 2,2 units and compared to 2010 the decrease was 2,9 units. The occupancy in 2010 was 55,7% and till 2017 there was an increase of 6,2 units reaching 61,9%, which was the highest occupancy at hotel accommodations during the period 2010-2014. Then there was a decrease by 30,7 units till 2020 going down to 31,2%, which was the lowest occupancy at hotel accommodations

during the period 2010-2024. Then from 2020 till 2023 there was a continuous increase by 27,9 units.

In the Regional Unit of Rethymnon, in 2024 the occupancy of the hotel accommodations from foreign and domestic visitors was 55,8%, having a decrease of 2,1 units compared to 2023, when it was 57,9%. Compared to 2019, there was an increase in 2024 by 2,3 units and compared to 2010 the decrease was 4,5 units. The occupancy in 2010 was 60,3% and till 2017 there was an increase of 5,3 units reaching 65,6%, which was the highest occupancy at hotel accommodations during the period 2010-2014. Then there was a decrease by 35,2 units till 2020 going down to 30,4%, which was the lowest occupancy at hotel accommodations during the period 2010-2024. Then from 2020 till 2023 there was a continuous increase by 27,5 units.

In the Regional Unit of Lasithi, in 2024 the occupancy of the hotel accommodations from foreign and domestic visitors was 48,7%, having a decrease of 11,5 units compared to 2023, which was 60,2%. Compared to 2019, there was a lower decrease in 2024 by 6,4 units and compared to 2010 the decrease was 4 units. The occupancy in 2010 was 52,7% and till 2017 there was an increase of 9 units reaching 61,7%, which was the highest occupancy at hotel accommodations during the period 2010-2014. Then there was a decrease by 30,5 units till 2020 going down to 31,2%, which was the lowest occupancy at hotel accommodations during the period 2010-2024. Then from 2020 till 2023 there was a continuous increase by 29 units.

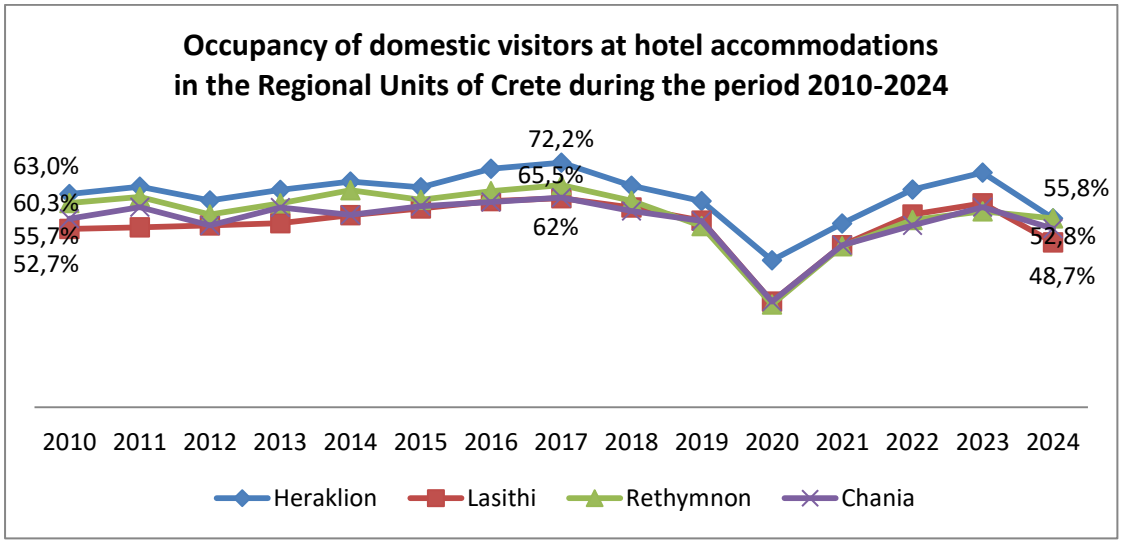


Figure 3.44 Occupancy of domestic visitors at hotel accommodations in the Regional Units of Crete during the period 2010-2024
Sources: Bank of Greece, Border Research, 2025; INSETE Intelligence, 2025

CHAPTER 4

AGRICULTURE

4.1 Total cultivated agricultural land in Crete and Greece

Total cultivated agricultural land includes crops on arable land, tree groves (compact plantations), vines (grapes and raisins) and garden area.

In Greece in 2023 the distribution of the total stremmas of cultivated agricultural land consisted of 59,6% crops on arable land, 36,2% tree groves (compact plantations), 2,5% vines (grapes and raisins) and 1,6% garden area.

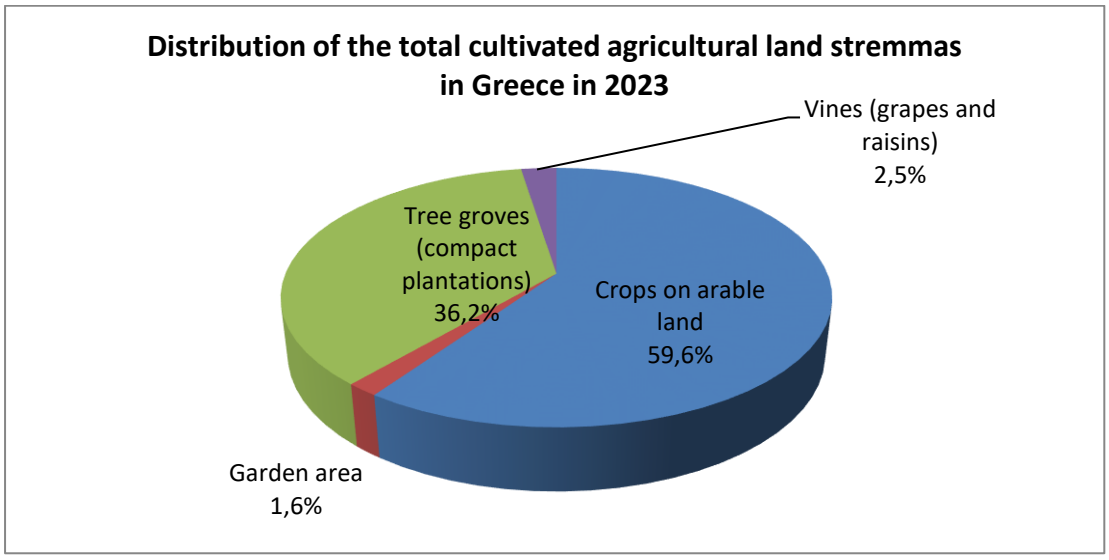


Figure 4.1 Distribution of the total cultivated agricultural land stremmas in Greece in 2023
Source: Hellenic Statistical Authority, 2026

In Greece, in 2023 the total cultivated agricultural land was 27.207.539 stremmas, having a marginal increase of 0,1% compared to 2022 with 27.180.783 stremmas. Compared to 2011, there was a decrease in 2023 by 15% reaching 31.854.517 stremmas, which was the highest number of stremmas during the period 2011-2023. From 2011 till 2020 there was a continuous decrease of the total cultivated agricultural land by 16%. After that year from 2020 till 2023 there was a continuous small increase by 2%.

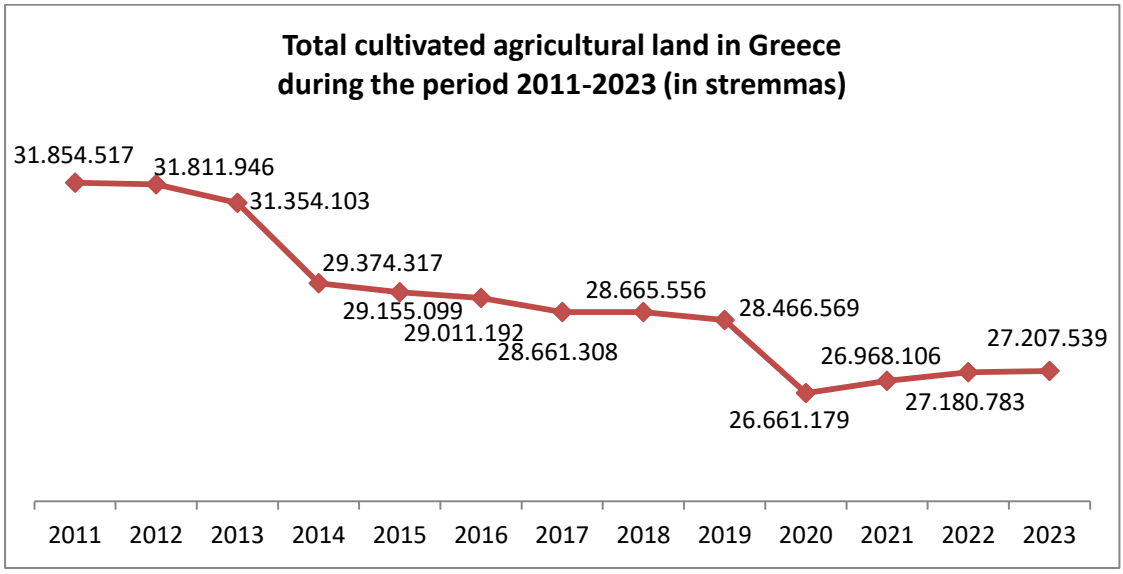


Figure 4.2 Total cultivated agricultural land in Greece during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

In Crete in 2023 the distribution of the total stremmas of cultivated agricultural land consisted of 85% tree groves (compact plantations), 8,4% crops on arable land, 4,7% vines (grapes and raisins) and 1,9% garden area.

Comparing the total stremmas of cultivated agricultural land in Crete and Greece, in Crete there is a higher percentage of tree groves than in Greece, whereas in Greece the percentage of crops in arable land is much higher than in Crete.

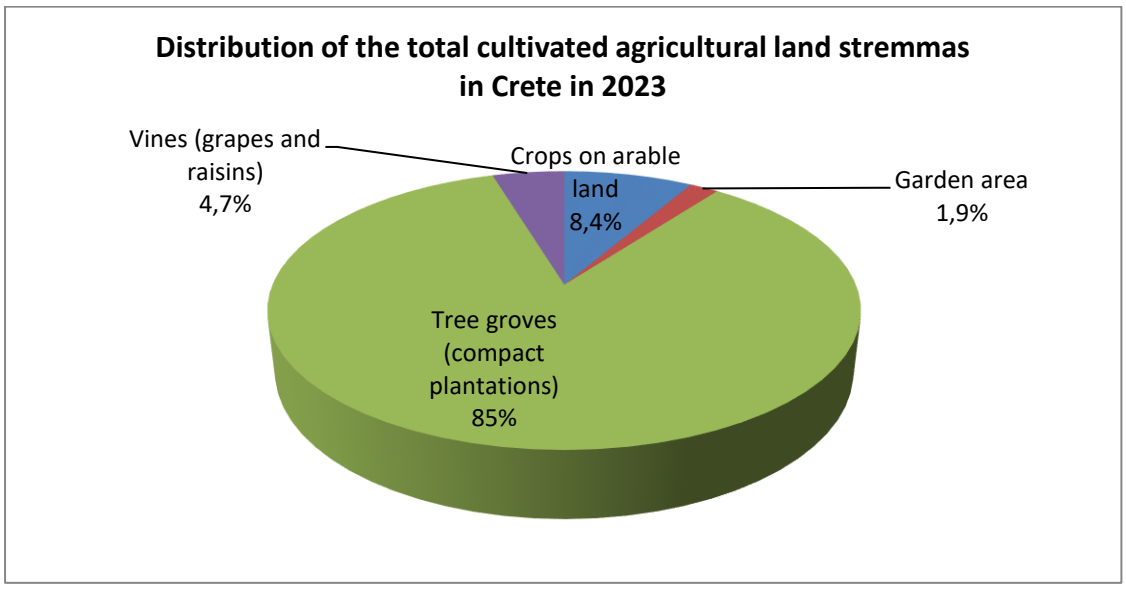


Figure 4.3 Distribution of the total cultivated agricultural land stremmas in Crete in 2023
Source: Hellenic Statistical Authority, 2026

In Crete, in 2023 the total cultivated agricultural land was 2.432.598 stremmas, having an increase of 3,9% compared to 2022 with 2.340.812 stremmas. Compared to 2011, there was a decrease in 2023 by 2,2% reaching 2.486.291 stremmas. From 2011 till 2020 there was a decrease of the total cultivated agricultural land by 8,7%. After that year from 2020 till 2023 there was a continuous small increase by 7,1%. The highest amount of total cultivated agricultural land in Crete during the period 2011-2023 was recorded in 2014 with 2.579.516 stremmas.

Comparing the evolution of total cultivated agricultural land in Crete and Greece, during the period 2011-2023 the decrease of stremmas was much higher in Greece than in Crete. In 2023, Crete constituted 8,9% of the total stremmas of cultivated agricultural land in Greece.

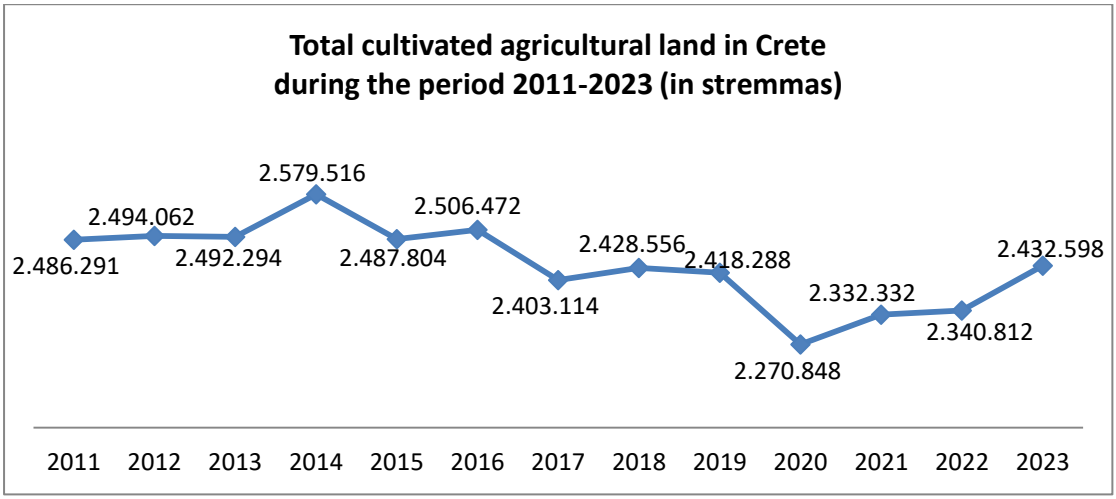


Figure 4.4 Total cultivated agricultural land in Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

4.1.1 Total cultivated agricultural land in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2023 the total cultivated agricultural land was 1.186.572 stremmas, having an increase of 4,1% compared to 2022 with 1.140.355 stremmas. Compared to 2011, there was no significant change. The highest amount of total cultivated agricultural land in Heraklion during the period 2011-2023 was in 2021 with 1.260.628 stremmas.

In the Regional Unit of Chania, in 2023 the total cultivated agricultural land was 446.621 stremmas, having an increase of 6,5% compared to 2022 with 419.398 stremmas. Compared to 2011, there was a decrease in 2023 by 16,7% reaching 536.031 stremmas. From 2011 till

2019 there was no significant change. Then an annual decrease took place till 2020 by 26% and after that year till 2023 there was an increase of 10%. The highest amount of total cultivated agricultural land in Chania during the period 2011-2023 was recorded in 2019 with 544.781 stremmas.

In the Regional Unit of Rethymnon, in 2023 the total cultivated agricultural land was 400.433 stremmas, having a decrease of 3,5% compared to 2022 with 414.821 stremmas. Compared to 2011, there was an increase in 2023 by 7,4%. From 2011 till 2021 there was no significant change. After that year there was an annual increase by 14% reaching 414.821 stremmas, which was the highest amount of total cultivated agricultural land during the period 2011-2023.

In the Regional Unit of Lasithi, in 2023 the total cultivated agricultural land was 398.972 stremmas, having an increase of 8,9% compared to 2022 with 366.238 stremmas. Compared to 2011, there was an increase in 2023 by 1,9%. From 2011 till 2014 there was an increase of 27% reaching 497.700 stremmas, which was the highest amount of total cultivated agricultural land during the period 2011-2023. From 2014 till 2020 there was a decrease by 38% and then there was a continuous increase till 2023 by 30%.

In 2023, the Regional Unit of Heraklion constituted 48,8% of the total stremmas of cultivated agricultural land in Crete; Chania followed with 18,4%, and then Rethymnon and Lasithi with 16,4% for each Regional Unit.

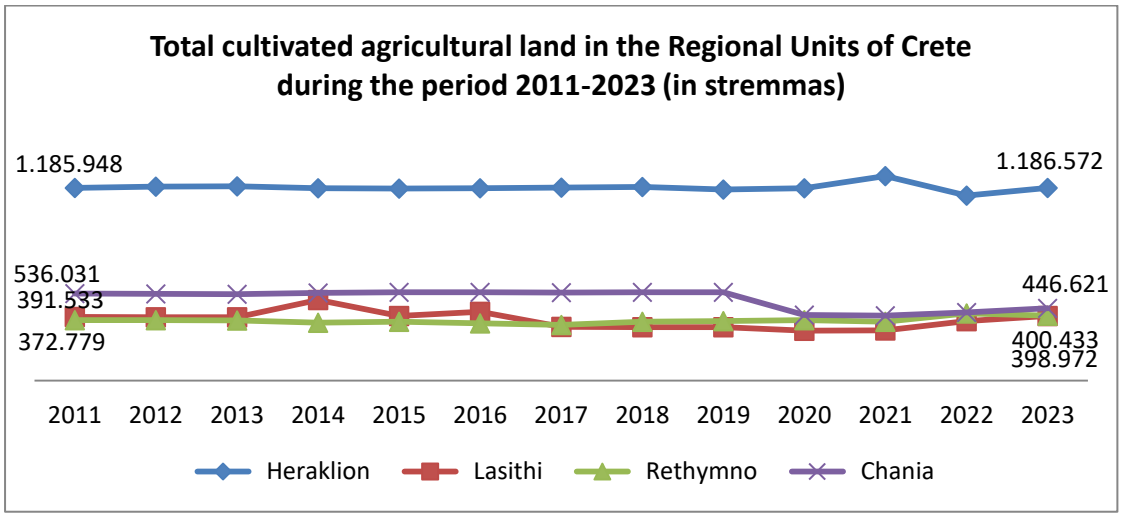


Figure 4.5 Total cultivated agricultural land in the Regional Units of Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Looking at the distribution per Regional Unit of Crete in 2023, Chania had the highest percentage of tree groves with 92%, Rethymnon the highest percentage of crops on arable land with 15,5%, Iraklion the highest percentage in vines with 7,2% and Lasithi the highest percentage of garden area with 4,5%.

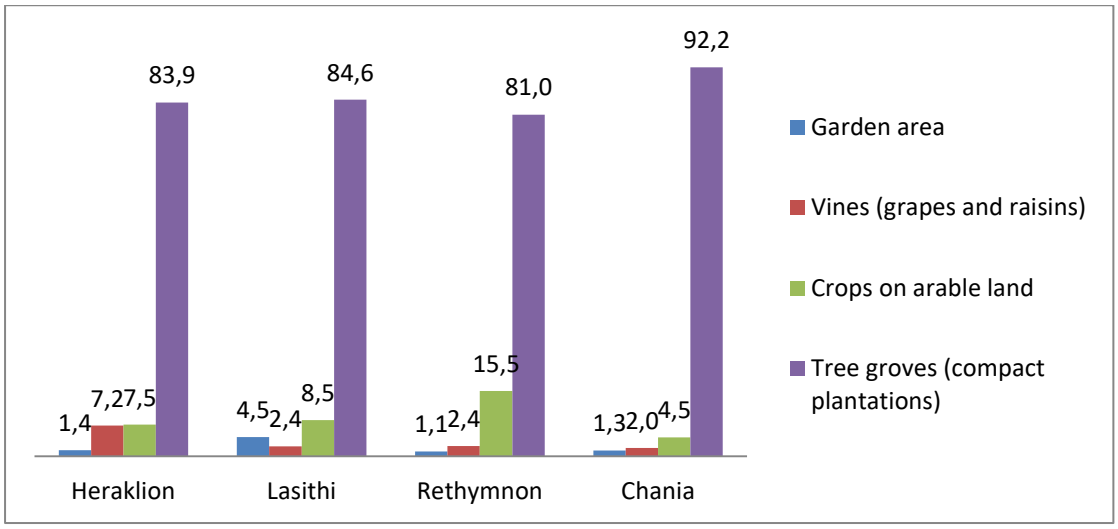


Figure 4.6 Distribution of cultivated agricultural land in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.2 Tree groves in Crete and Greece

In Greece, in 2023 tree groves (compact plantations) were 9.861.483 stremmas, having an increase of 2,1% compared to 2022 with 9.660.271 stremmas. Compared to 2011, there was a decrease in 2023 by 3,6% reaching 10.224.474 stremmas, The following year in 2012 recorded the highest amount with 10.236.227 stremmas during the period 2011-2023. From 2019 to 2020 there was a decrease of 6,4% tree grove stremmas going down to 9.373.601 stremmas, which was the lowest number of stremmas of tree groves in Greece during the period 2011-2023. The next year till 2023 there was a continuous increase by 5,2%.

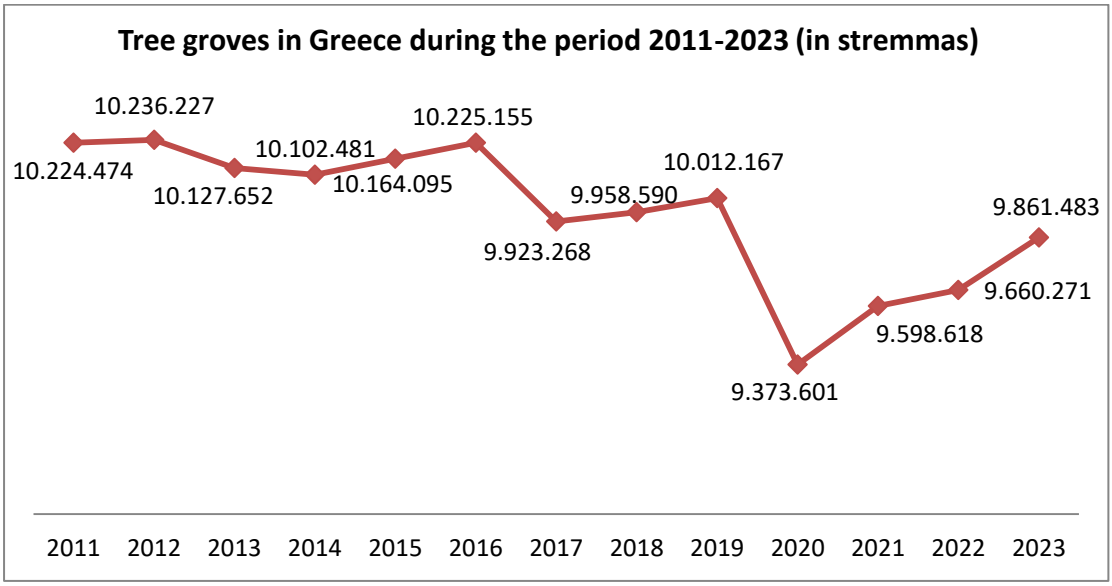


Figure 4.7 Tree groves in Greece during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

In Crete, in 2023 tree groves (compact plantations) were 2.068.576 stremmas, having an increase of 4,1% compared to 2022 with 1.986.254 stremmas. Compared to 2011, there was an increase in 2023 by 8,1% reaching 1.914.117 stremmas, which was the lowest number of stremmas of tree groves in Crete during the period 2011-2023. The next two years there was no significant change. In 2014 there was an annual increase by 9,5% reaching 2.096.636 stremmas, which was the lowest number of stremmas of tree groves in Crete during the period 2011-2023.

Comparing the evolution of tree groves (compact plantations) in Crete and Greece, during the period 2011-2023 there was an increase of tree grove stremmas by 8,1% in Crete, whereas in Greece there was a decrease by 3,6%. In 2023, Crete constituted 21% of the total tree grove stremmas in Greece.

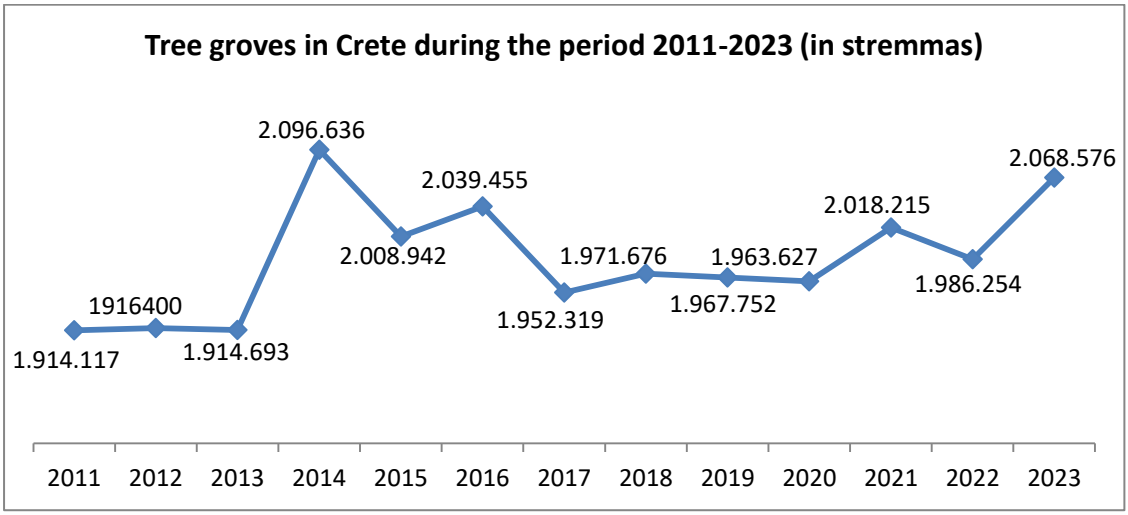


Figure 4.8 Tree groves in Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Tree groves consist of olive groves, citrus trees (lemon, orange, mandarin and other citrus trees), nut trees (almond, walnut, chestnut and other nut trees), pome fruit trees (pear, apple, kiwi and other pome fruit trees), stone fruit trees (peach, nectarine, cherry, apricot and other stone fruit trees) and other trees (avocado, banana, mastic, medlar, carob trees).

In Greece in 2023, the distribution of the total stremmas of tree groves consisted of 78,8% olive groves, 6,4% stone fruit trees, 5,2% nut trees, 4,1% citrus trees 3,5% pome fruit trees and 2,1 % other trees. In Crete in 2023, 95,6% of the tree groves consisted of olive groves, a percentage which is higher than that of Greece, as well as 1% citrus trees, 0,4% nut trees, 0,3% pome fruit trees, 0,1% stone fruit trees and 2,6% other trees.

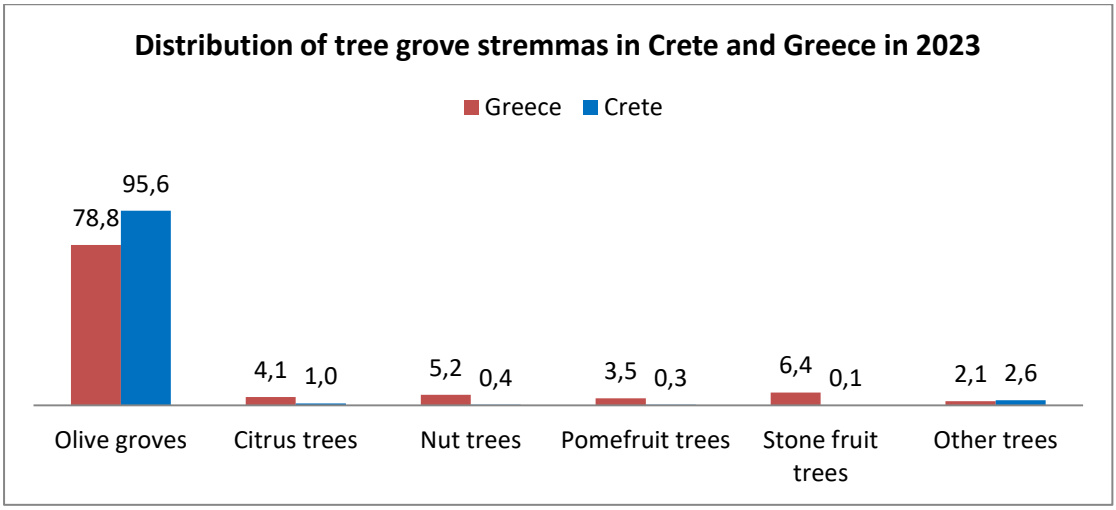


Figure 4.9 Distribution of tree grove stremmas in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

4.2.1 Tree groves in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2023 the tree groves were 995.043 stremmas, having an increase of 3,7% compared to 2022 with 959.243 stremmas. Compared to 2011, there was an increase in 2023 by 16%, reaching 854.674 stremmas, which was the lowest number of tree grove stremmas during the period 2011-2023. From 2011 till 2019 there was no significant change. From 2019 to 2021 there was an increase by 16% reaching 1.060.652 stemmas which was the highest number of tree grove stremmas during the period 2011-2023.

In the Regional Unit of Chania, in 2023 the tree groves were 411.799 stremmas, having an increase of 6,4% compared to 2022 with 386.966 stremmas. Compared to 2011, there was a decrease in 2023 by 12%, reaching 468.319 stremmas. From 2011 till 2019 there was no significant change. After that year there was an annual decrease in 2020 by 23% going down to 370.679 stremmas, which was the lowest number of tree grove stremmas during the period 2011-2023. From 2020 till 2023 there was a continuous increase by 11%.

In the Regional Unit of Lasithi, in 2023 the tree groves were 337.336 stremmas, having an increase of 6,3% compared to 2022 with 317.474 stremmas. Compared to 2011, the increase in 2023 was 12% going up to 301.872 stremmas. The next two years had no significant change. Then from 2013 to 2014 there was an annual increase by 42% reaching 429.396 stremmas, which was the highest number of tree grove stremmas during the period 2011-2023. From 2014 till 2023 there was a decrease by 21%.

In the Regional Unit of Rethymnon, in 2023 the tree groves were 324.398 stremmas, having a marginal increase by 0,6% compared to 2022with 322.571 stremmas. Compared to 2011, the increase was higher in 2023 by 12%, going up to 289.252 stremmas. From 2011 till 2019 there was no significant change. Then in 2020 there was an annual increase by 14%, reaching 331.705 stremmas which was the highest number of tree groves stremma during the period 2011-2023.

In 2023, the Regional Unit of Heraklion constituted 48,1% of the total stremmas of tree groves in Crete; Chania followed with 19,8%, then Lasithi with 16,3% and Rethymnon with 15,7%.

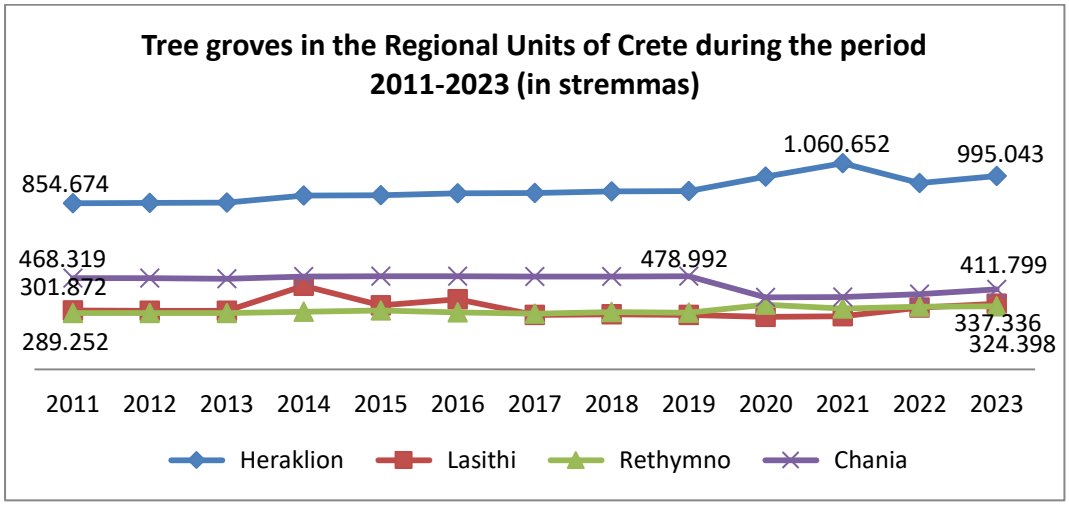


Figure 4.10 Tree groves in the Regional Units of Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Looking at the distribution of stremmas of tree groves per Regional Unit of Crete in 2023, the percentages of olive groves are above 90% in all Regional Units of Crete, with the highest in Lasithi with 97,8%. Concerning citrus fruit, Chania has the highest percentage with 3,9%. The percentages of all the other categories are very low in all the Regional Units of Crete.

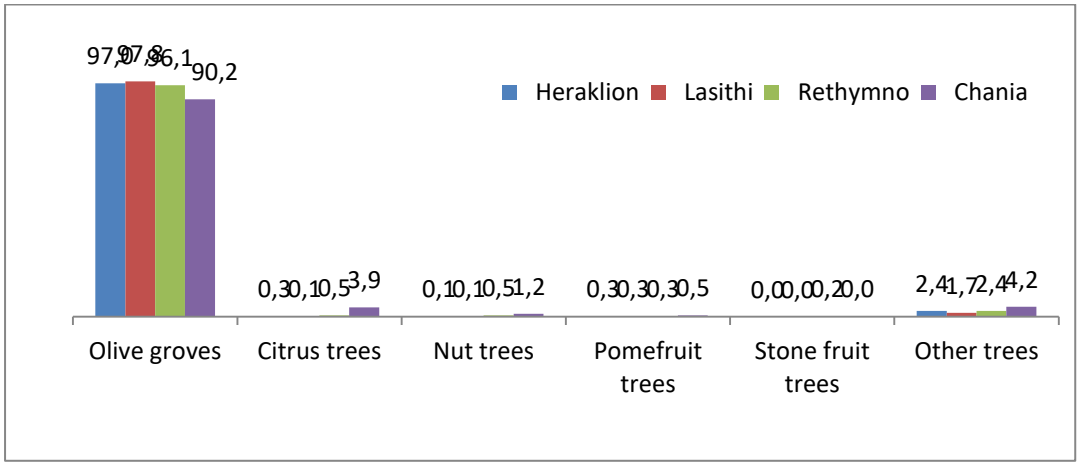


Figure 4.11 Distribution of tree groves in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.2.2 Production of tree groves in Crete and Greece

In 2023 in Greece the production of olives from groves was 2.498.941 tons derived from olives for olive oil (87%) and edible olives (13%), whereas in Crete there was a production of 415.442 tons derived exclusively from olives for olive oil (99,4%) and very little from edible olives (0,6%). Crete constituted 16,6% of the total production of olives in Greece.

The production of citrus tree products in Greece was 954.369 tons derived from oranges (71,6%), mandarins (22,6%) and lemons (5,8%), whereas in Crete there was a production of 46.094 tons derived from oranges (76,7%), lemons (14,2%) and mandarins (9,1%). Crete constituted 4,8% of the total production of citrus fruits in Greece.

The production of products from pome fruit trees in Greece was 863.276 tons derived from kiwifruit (40,9%), apples (37,9%), pears (11,9%), pomegranates (5,8%) and figs (3,5%), whereas in Crete there was a production of 10.924 tons derived from apples (44,3%), pomegranates (18,6%), figs (17,6%), pears (15,8%) and kiwifruit (3,7%). Crete constituted hust 1,3% of the total production of pome fruit in Greece.

The production of products from stone fruit trees in Greece was 945.004 tons, derived from peaches and nectarines (69,4%), apricots (16,5%) and cherries (14,1%), whereas in Crete there was a production of 1.952 tons derived from apricots (43,9%), peaches and nectarines (38,2%) and cherries (17,9%). Crete constituted a very small amount - just 0,2% - of the total production of stone fruits in Greece.

The production of products from nut trees in Greece was 2.498.941 tons derived from almonds (38,8%), walnuts (29,3%), chestnuts (21,3%) and pistachios (10,6%), whereas in Crete there was a production of 5.140 tons derived from walnuts (47,7%), chestnuts (32,9%), almonds (17,5%) and pistachios (1,9%). Crete constituted just 2,7% of the total production of nuts in Greece.

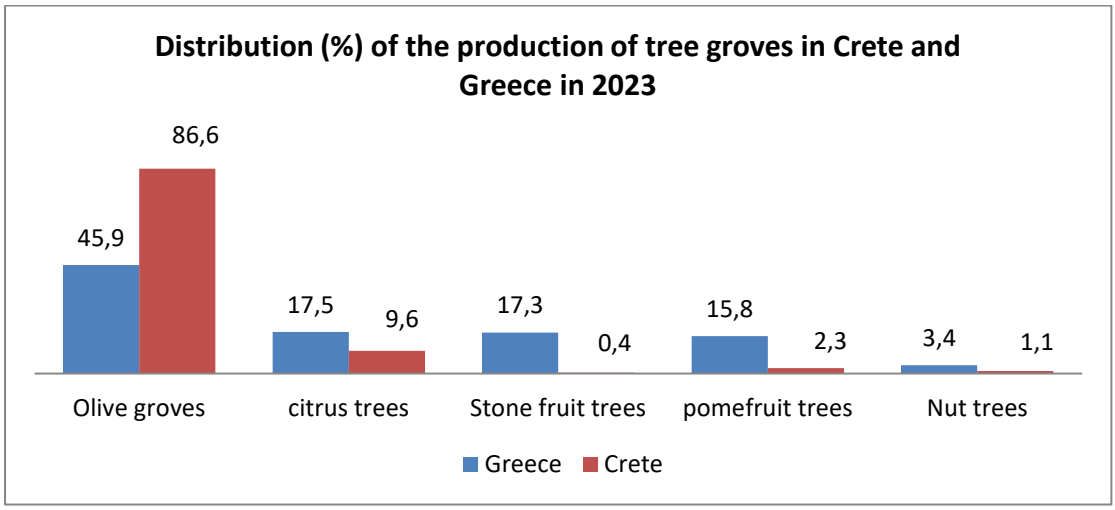


Figure 4.12 Distribution of the production of tree groves in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

Regarding the production of tree grove products per Regional Unit of Crete, Chania produced 44,3% of the olives in Crete; Heraklion followed with 27,4%, Rethymnon with 20,1%, and Lasithi with 8,2%. Concerning citrus fruit, Chania produced 80% of the citrus fruit of Crete; Heraklion followed with 11,9%, Rethymnon with 5,6% and Lasithi with 2,5%. As far as pome fruit is concerned, Heraklion produced 49,4% of the pome fruit in Crete; Chania followed with 21,5%, Rethymnon with 18,7% and Lasithi with 10,4%. Chania produced 45,2% of the nuts in Crete, then Heraklion followed with 35,6%, Rethymnon with 9,9% and Lasithi with 9,3%. Heraklion produced the 62,1% of the stone fruit in Crete, then Chania followed with 27,1%, Rethymnon with 7,7% and Lasithi with 3%.

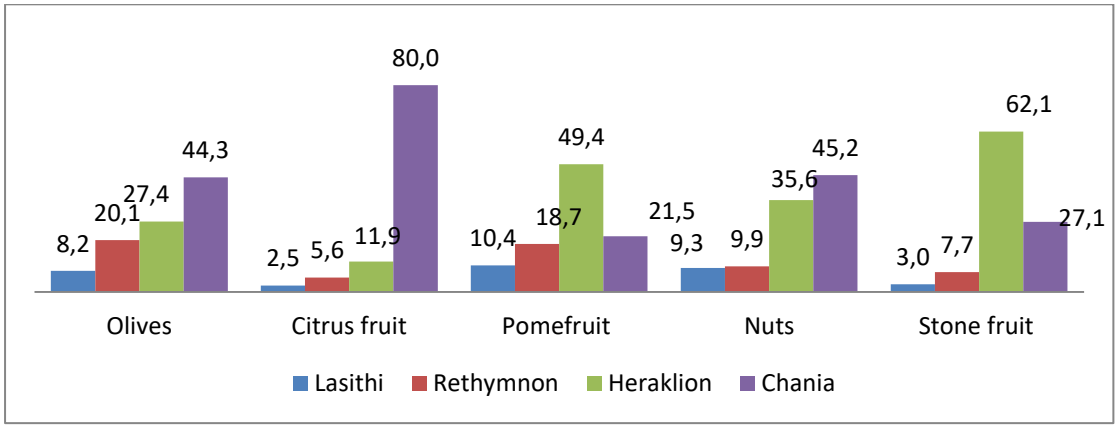


Figure 4.13 Distribution of the production of tree groves in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

Concerning the production of olive oil in 2023, Greece produced 228.850 tons of olive oil, whereas in Crete the production was 69.760 tons, constituting 30,5% of the total production of olive oil in Greece. Regarding the production of olive oil per Regional Unit of Crete, Chania produced 28.491 tons of olive oil, constituting 40,8% of the total production of olive oil in Crete; Heraklion follows with 35,6%, then Rethymnon with 13,4% and Lasithi with 10,2%. It should be noted that due to the unpredicted climate conditions, lack of water, and the appearance of possible diseases, the production and the quality of the olive oil can be seriously affected, causing serious fluctuation of the total production of olive oil year by year among the Prefectures.

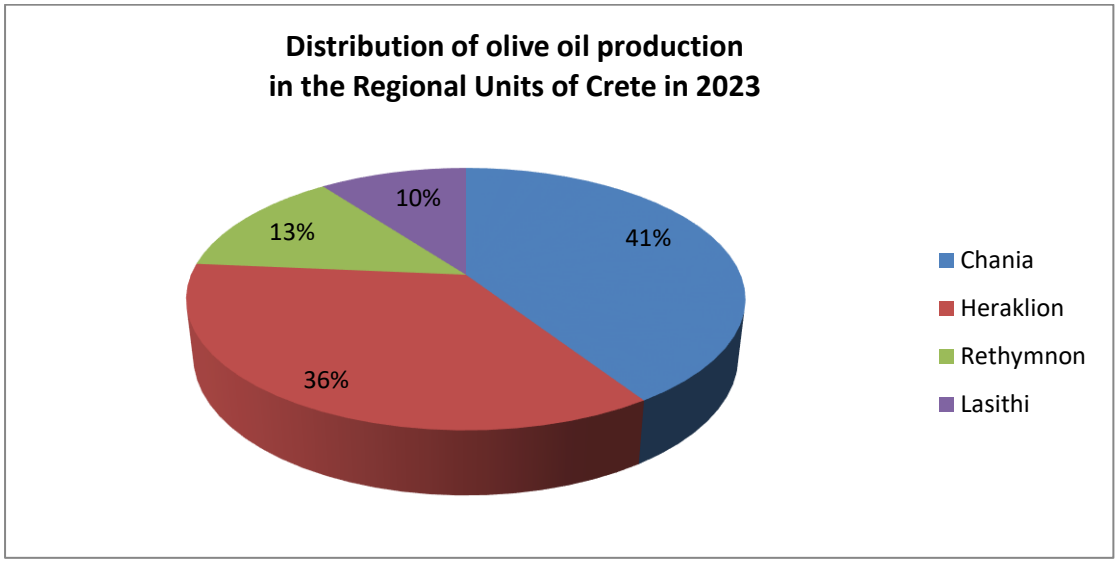


Figure 4.14 Distribution of olive oil production in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.3 Crops on arable land in Crete and Greece

In Greece, in 2023 there were 16.228.181 stremmas with crops on arable land, having a marginal decrease of 0,9% compared to 2022, when there were 16.381.631 stremmas. Compared to 2011, there was a decrease in 2023 by 17% reaching 19.478.267 stremmas, which was the highest number of stremmas during the period 2011-2023. From 2011 till 2023 there was a continuous decrease of crops on arable land in Greece.

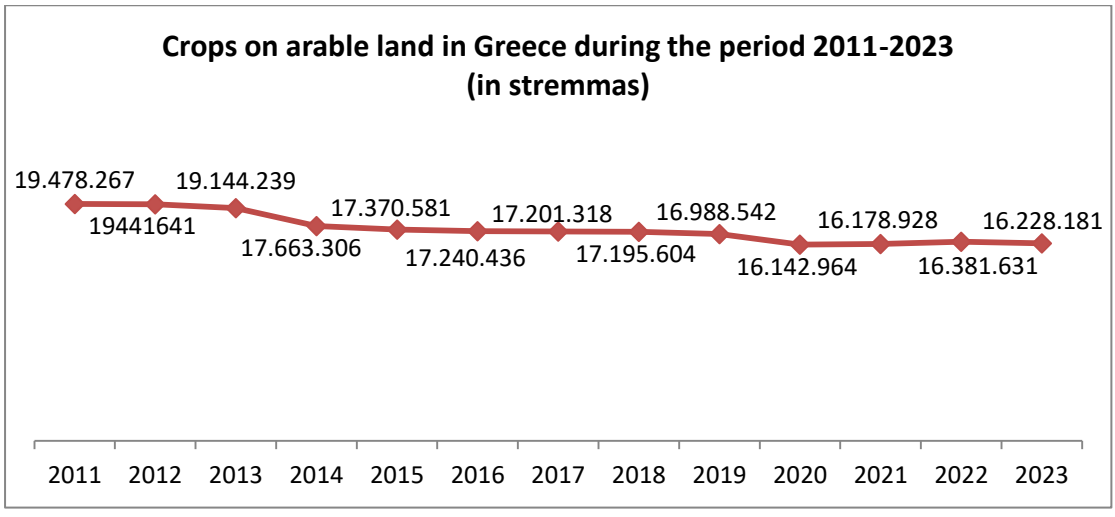


Figure 4.15 Crops on arable land in Greece during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

In Crete, in 2023 there were 204.693 stremmas of crops on arable land, having an increase of 8,5% compared to 2022, when there were 188.692 stremmas. Compared to 2011, there was a

decrease in 2023 by 23% reaching 265.175 stremmas. From 2011 till 2020 there was a decrease of crops on arable land by 49%. After that year from 2020 till 2023 there was a continuous increase by 51%. The highest number of crops on arable land in Crete during the period 2011-2023 was in 2013 with 271.061 stremmas.

Comparing the evolution of crops on arable land in Crete and Greece, during the period 2011-2023 the decrease in stremmas was much higher in Crete than in Greece. In 2023, Crete constituted just 1,3% of the total crops on arable land in Greece.

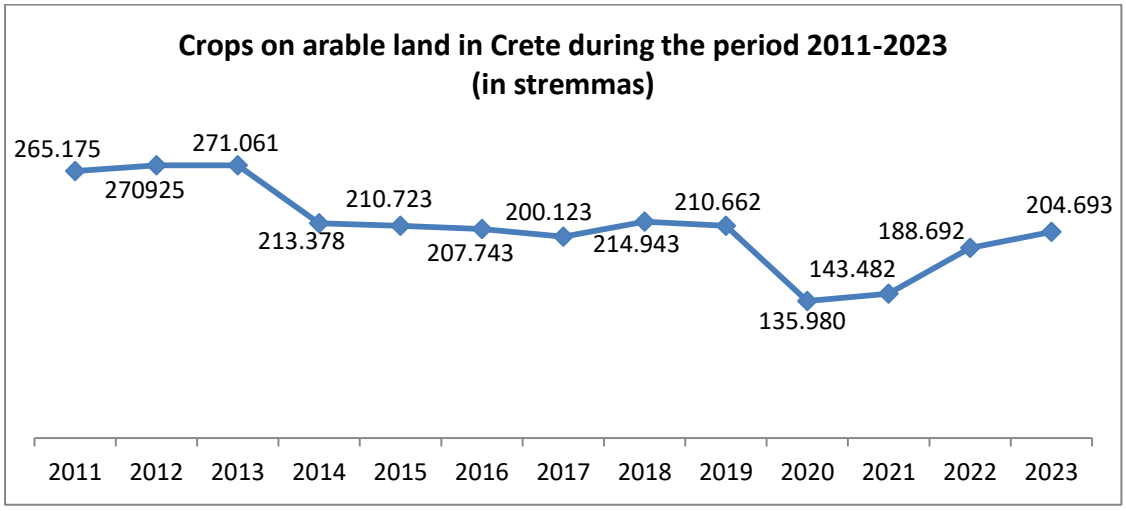


Figure 4.16 Crops on arable land in Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Crops on arable land consist of fodder plants for hay (barley for hay, oats for hay, vetch for hay, clover, low land meadows for hay, maize and others), cereals for grain (wheat, barley, oats, rye, maize, rice, sorghum and others), fodder pulses (vetch, bitter vetch, lupin, vetchling, fodder peas, fodder broad beans, fodder lentils, clover seeds, among others), melons, watermelons and potatoes, edible pulses (beans, broad beans, lentils, lathyrus, chickpeas, peas, among others) and industrial plants (tobacco, cotton, sesame, sunflower, among others). In Greece in 2023, the distribution of the total stremmas of crops on arable land consisted of 46% cereals for grain, 20% industrial plants, 27% fodder plants for hay, 5% fodder pulses, 1,5% edible plants and 1% melons, watermelons and potatoes. In Crete in 2023, fodder plants for hay comprised the highest percentage with 68%, followed by cereals for grain with 12%, fodder pulses with 14%, melons, watermelons and potatoes with 5%, and edible pulses and industrial plants, each one with 0,3.

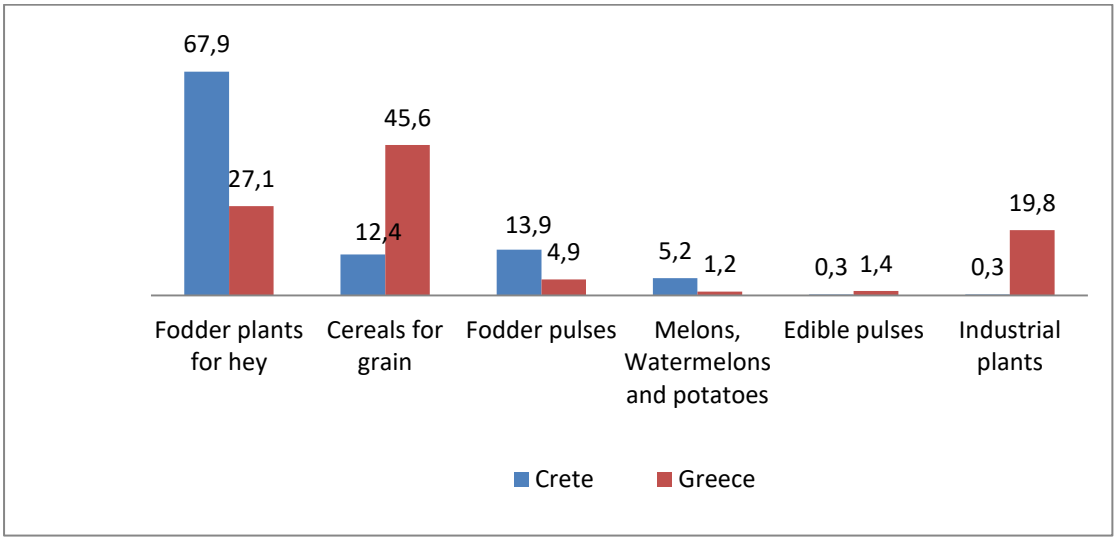


Figure 4.17 Distribution of crops on arable land in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

4.3.1 Crops on arable land in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2023 the crops on arable land comprised 88.667 stremmas, having an increase of 23% compared to 2022, when there were 72.359 stremmas. Compared to 2011, there was a decrease in 2023 by 30% reaching 125.943 stremmas, which was the highest number of stremmas with crops on arable land during the period 2011-2023.

In the Regional Unit of Rethymnon, in 2023 the crops on arable land comprised 62.015 stremmas, having a decrease of 21% compared to 2022, when there were 78.041 stremmas. Compared to 2011, there was an increase in 2023 by 9,3%, reaching 56.717 stremmas. From 2011 till 2013 there was no significant change. From 2019 to 2020 there was an annual decrease by 53%, going down to 28.261 stremmas which was the lowest number of stremmas with crops on arable land during the period 2011-2023.

In the Regional Unit of Lasithi, in 2023 the crops on arable land comprised 34.076 stremmas, having an increase of 51% compared to 2022, when there were 22.586 stremmas. Compared to 2011, there was a decrease in 2023 by 29%, reaching 47.839 stremmas. From 2011 till 2013 there was no significant change. From 2013 to 2021 there was a high decrease by 87%, going down to 6.248 stremmas which was the lowest number of stremmas with crops on arable land during the period 2011-2023. Then there was a continuous increase till 2023 by 81%.

In the Regional Unit of Chania, in 2023 the crops on arable land comprised 19.935 stremmas, having an increase of 27% compared to 2022, when there were 15.706 stremmas. Compared to 2011, there was a decrease in 2023 by 43%, reaching 34.676 stremmas. From 2011 till 2019 there was no significant change. From 2019 to 2020 there was an annual decrease by 47% going down to 18,144 stremmas, which was the lowest number of stremmas with crops on arable land as during the period 2011-2023.

In 2023, the Regional Unit of Heraklion constituted 43,3% of the total stremmas of crops on arable land in Crete; Rethymnon followed with 30,3%, then Lasithi with 16,6% and Chania with 9,7%.

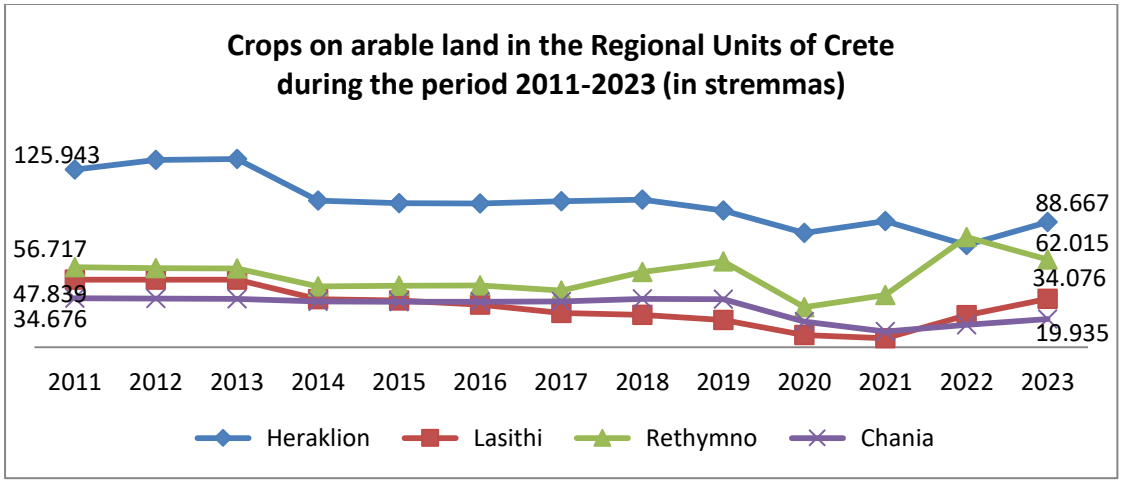


Figure 4.18 Crops on arable land in the Regional Units of Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Looking at the distribution of crops on arable land in 2023, Rethymnon had the highest percentage of fodder plants for hay with 82%, while Heraklion had the highest percentage of cereals for grain with 23% as well as fodder pulses with 19%, and Chania had the highest percentage of melons, watermelons and potatoes with 7%. Edible pulses and industrial plants constituted a percentage lower than 0,5% in all the Regional Units of Crete.

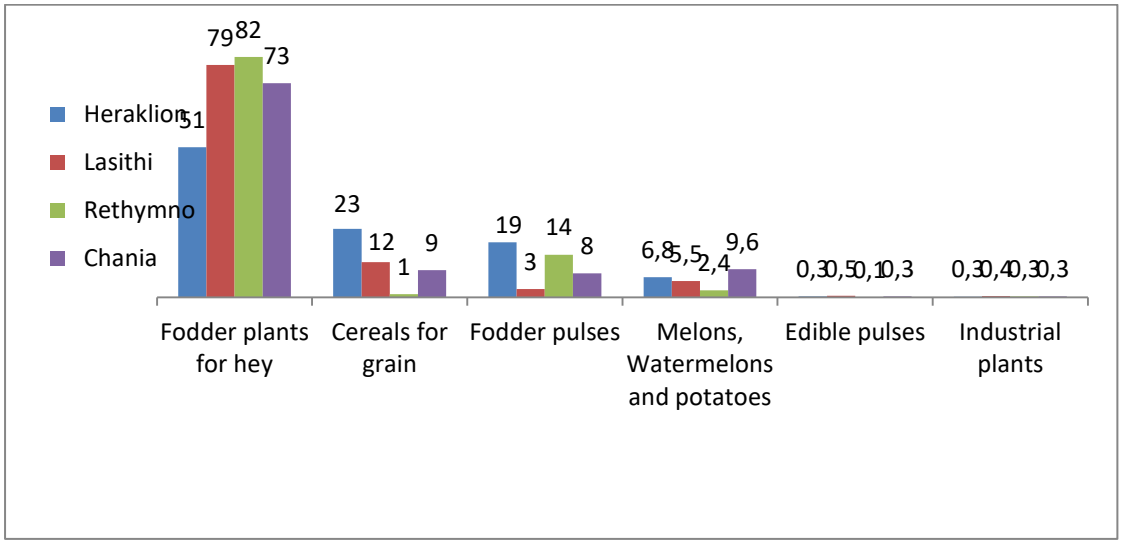


Figure 4.19 Distribution of crops on arable land in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.3.2 Production on arable land in Crete and Greece

In 2023 in Greece the production of cereals for grain was 3.394.121 tons derived mainly from maize (41%) and wheat (39%), whereas in Crete it was 3.859 tons derived mainly from barley (52%), rye (26%) and oats (13%). Crete constituted just 0,1% of the total production of cereals for grain in Greece.

The production of edible pulses in Greece was 34.024 tons derived mainly from lentils (34%), beans (31%) and chickpeas (27%), whereas in Crete the production of edible pulses was 96 tons derived mainly from broad beans (36%), chickpeas (32%) and beans (22%). Crete constituted just 0,3% of the total production of edible pulses in Greece.

The production of industrial plants in Greece was 942.385 tons derived mainly from cotton (74%) and sunflower (21%), whereas in Crete the production of industrial plants was just 1 ton from sunflowers.

The production of fodder pulses in Greece was 168.557 tons derived mainly from vetch (46%), whereas in Crete the production of fodder pulses was 8.042 tons, also derived mainly from vetch (91%). Crete constituted 4,8% of the total production of fodder pulses in Greece.

The production of fodder plants for hay in Greece was 3.528.969 tons derived mainly from clover (62%), whereas in Crete the production of fodder plants for hay was 59.448 tons

derived mainly from vetch for hay (35%) and low land meadows for hay (29%). Crete constituted just 1,7% of the total production of fodder plants for hay in Greece.

The production of melons, watermelons and potatoes in Greece was 616.358 tons derived from potatoes (51%), watermelons (39%) and melons (9%), whereas in Crete the production of melons, watermelons and potatoes was 17.294 tons derived from potatoes (56%), watermelons (26%) and melons (19%). Crete constituted just 2,8% of the total production of melons, watermelons and potatoes in Greece.

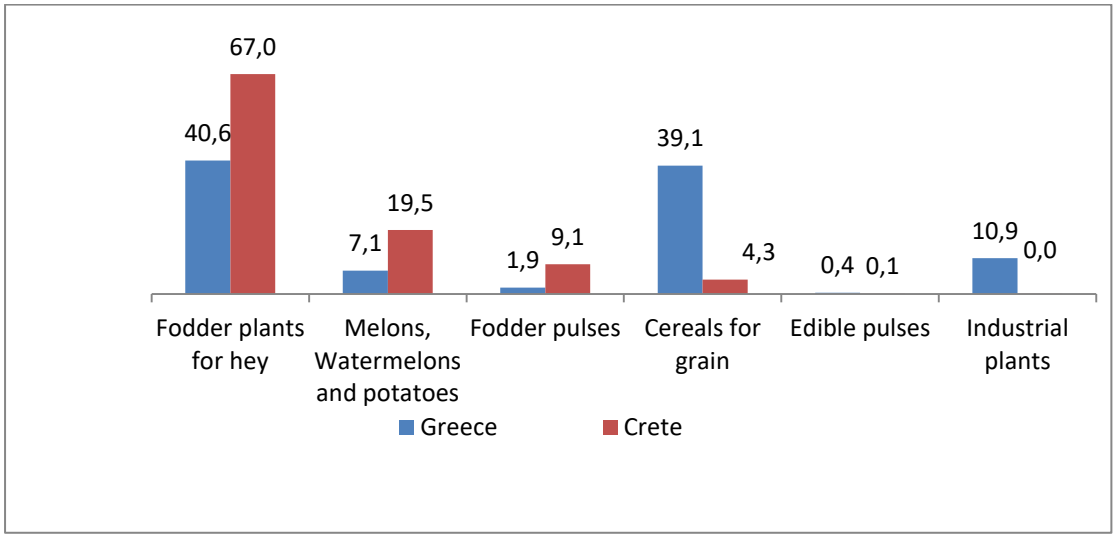


Figure 4.20 Distribution of the production on arable land in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

4.4 Vines in Crete and Greece

In Greece, in 2023 vines (grapes and raisins) covered 673.352 stremmas, which was the lowest number of stremmas during the period 2011-2023, having a decrease of 2,1% compared to 2022, when it was 687.860 stremmas. Compared to 2011, there was a higher decrease in 2023 by 41% reaching 1.147.215 stremmas. The next year in 2012 the highest number was recorded with 1.148.349 stremmas during the period 2011-2023. From 2019 till 2023 there was a continuous decrease in stremmas covered with vines by 41%.

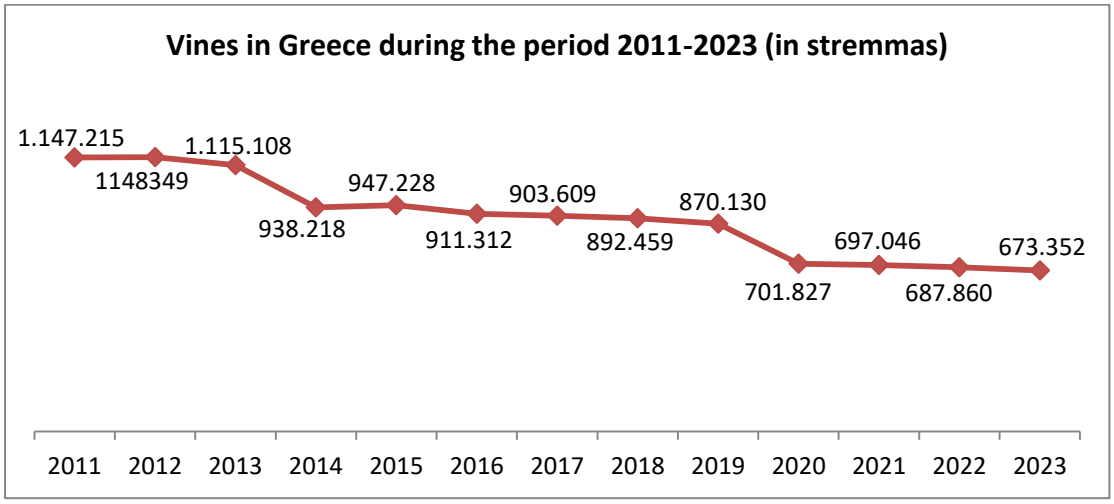


Figure 4.21 Vines in Greece during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

In Crete, in 2023 vines (grapes and raisins) covered 113.861 stremmas, which was the lowest number of stremmas during the period 2011-2023, having a decrease of 4,6% compared to 2022, when it was 119.324 stremmas. Compared to 2011, there was a higher decrease in 2023 by 49% reaching 221.962 stremmas, which was the highest number of stremmas during the period 2011-2023. Till 2023 there was a continuous decrease of stremmas covered with vines in Crete.

Comparing the evolution of vines (grapes and raisins) in Crete and Greece, during the period 2011-2023 there was a higher decrease in Crete than in Greece. Crete constituted 16,9% of the total stremmas covered with vines (grapes and raisins) in Greece.

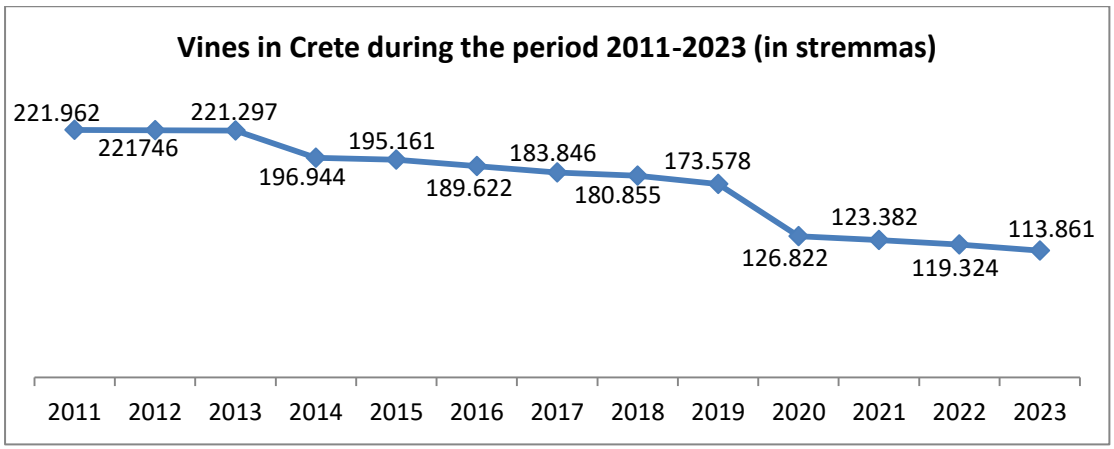


Figure 4.22 Vines in Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Vines (grapes and raisins) are consisted of grapes for wine, table grapes and vines for raisins. In Greece in 2023, the distribution of the total stremmas of Vines (grapes and raisins) was consisted of 59,5% by grapes for wine, 12,9% by table grapes and 27,6 % by vines for raisins. In Crete in 2023, the 40,8% of vines is consisted of grapes for wine, percentage which is lower than that of Greece, 16,6% by table grapes and 42,6% by vines for raisins, percentage which is higher than that of Greece.

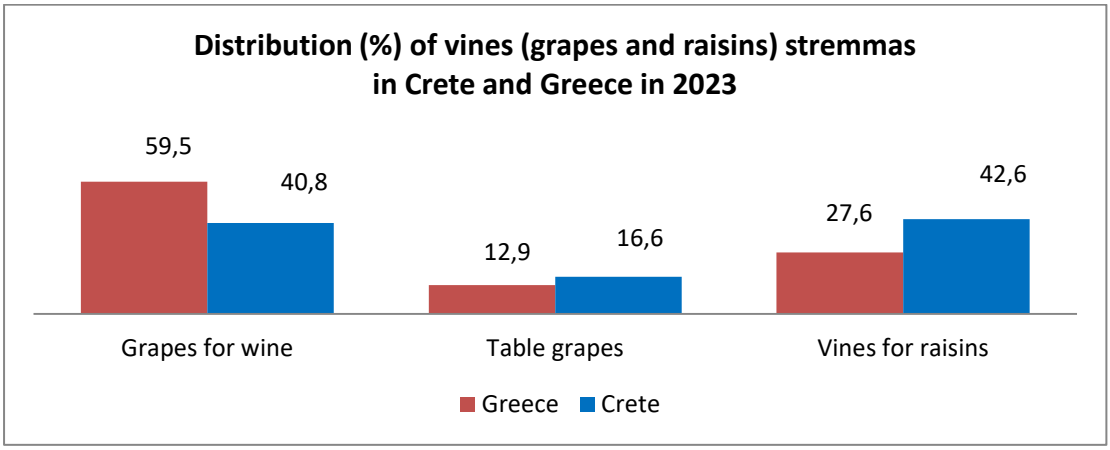


Figure 4.23 Distribution of vines (grapes and raisins) stremmas in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

4.4.1 Vines in the Regional Units of Crete

In the Regional Unit of Heraklion, in 2023 vines (grapes and raisins) covered 85.855 stremmas, which was the lowest number of stremmas during the period 2011-2023, having a decrease of 6,2% compared to 2022, when there were 91.507 stremmas. Compared to 2011, there was a higher decrease in 2023 by 49% reaching 168.361 stremmas. The next year (2012) had the highest number of stremmas covered with vines during the period 2011-2023 with 168.739 stremmas. From 2012 to 2023 there was a continuous decrease of stremmas covered with vines by 49%.

In the Regional Unit of Rethymnon, in 2023 vines (grapes and raisins) covered 9.656 stremmas, having an increase of 2,4% compared to 2022, when there were 9.430 stremmas. Compared to 2011, there was a high decrease in 2023 by 42% reaching 16.609 stremmas. Over the next two years there was no significant change. From 2013 till 2017 there was a continuous decrease by 44% going down to 9.159 stremmas, which was the lowest number of stremmas covered with vines during the period 2011-2023.

In the Regional Unit of Lasithi, in 2023 vines (grapes and raisins) covered 9.469 stremmas, having a decrease of 1,1% compared to 2022, when there were 9.578 stremmas. Compared to 2011, there was a higher decrease in 2023 by 54% reaching 20.648 stremmas, which was the highest number of stremmas covered with vines during the period 2011-2023. From 2011 to 2023 there was a continuous decrease of stremmas covered with vines in Lasithi.

In the Regional Unit of Chania, in 2023 vines (grapes and raisins) covered 8.881 stremmas, having a marginal increase of 0,8% compared to 2022, when there were 8.809 stremmas, which was the lowest number of stremmas during the period 2011-2023. Compared to 2011, there was a high decrease in 2023 by 46% reaching 16.344 stremmas, which was the highest number of stremmas covered with vines during the period 2011-2023. From 2011 to 2020 there was a continuous decrease of stremmas covered with vines by 44% in Chania.

In 2023, the Regional Unit of Heraklion constituted 75,4% of the total vine stremmas in Crete; Rethymnon followed with 8,5%, then Lasithi with 8,3% and Chania with 7,8%.

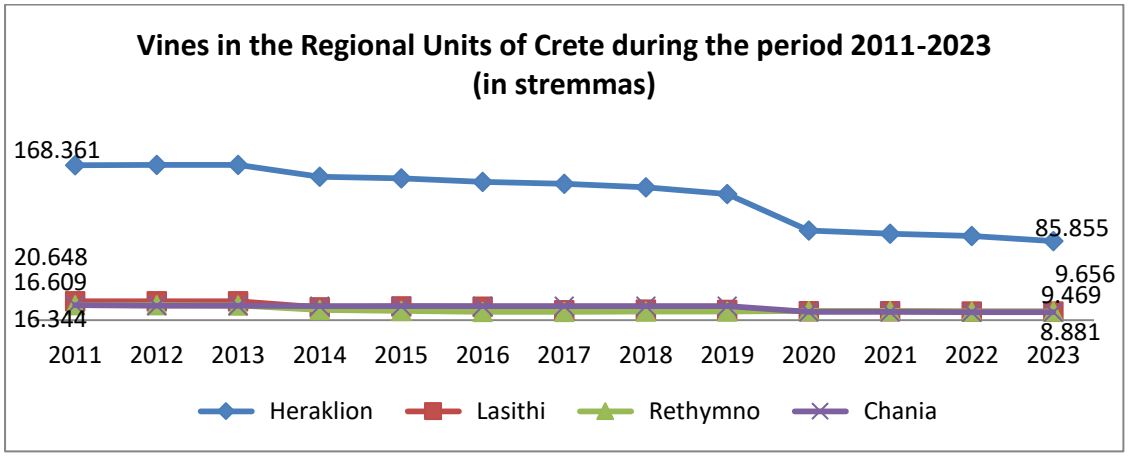


Figure 4.24 Vines in the Regional Units of Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Looking at the distribution of stremmas covered with vines (grapes and raisins) in 2023, Heraklion had the highest percentage of table grapes with 21,7%. Heraklion also had the highest percentage of vines for raisins with 50,6% and Chania had the highest percentage of grapes for wine with 97,8%.

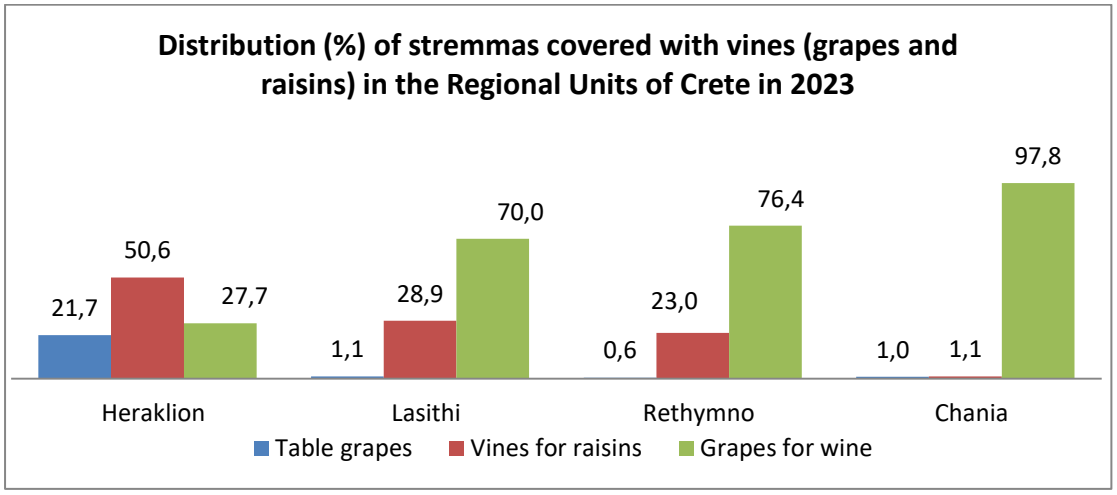


Figure 4.25 Distribution of stremmas covered with vines (grapes and raisins) in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.4.2 Production of vines in Crete and Greece

In 2023 in Greece the total production of vines (grapes and raisins) was 680.034 tons. 465.465 tons was used in the production of grapes for wine comprising 68,4% of the total vines, 163.555 tons was used in the production of table grapes comprising 24,1% of the total vines, and 51.013 tons was used in the production of grapes for raisins comprising 7,5% of the total vines.

In 2023 in Crete the total production of vines (grapes and raisins) was 117.045 tons. 66.047 tons was used in the production of grapes for wine comprising 56,4% of the total vines, 31.864 tons was used in the production of grapes for table use comprising 27,2% of the total vines and 19.134 tons was used in the production of grapes for raisins comprising 16,3% of the total vines.

In 2023 Crete constituted 17,2% of the total production of vines (grapes and raisins) in Greece. Moreover, Crete constituted 14,2% of the total production of grapes for wine in Greece, 19,5% of the total production of grapes for table use in Greece and 37,5% of the total production of grapes for raisins in Greece.

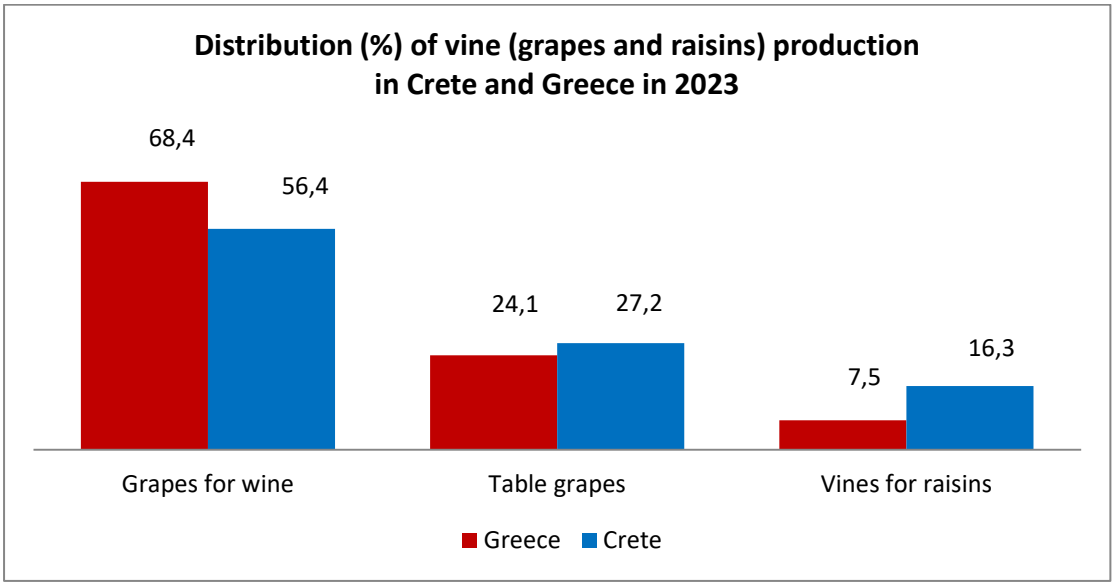


Figure 4.26 Distribution of vine (grapes and raisins) production in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

Regarding the production of vines (grapes and raisins) per Regional Unit of Crete in 2023, Heraklion constituted 75,4% of the total production of vines (grapes and raisins) in Crete, followed by Rethymnon with 8,5%, then Lasithi with 8,3% and Chania with 7,8%. Concerning the production of grapes for wine, Heraklion constituted 60,3% of the total production of grapes for wine in Crete, followed by Lasithi with 15,1%, Chania with 13,3% and Rethymnon with 11,2%. As far as the production of grapes for table use is concerned, Heraklion constituted 95,9% of the total production of grapes for table use in Crete, Rethymnon follows with 1,8%, then Lasithi with 1,6% and Chania with 0,7%. Regarding the production of grapes for raisins, Heraklion constituted 94,7% of the total production of grapes for raisins in Crete, followed by Lasithi with 3,8%, then Rethymnon with 1,4% and Chania with 0,1%.

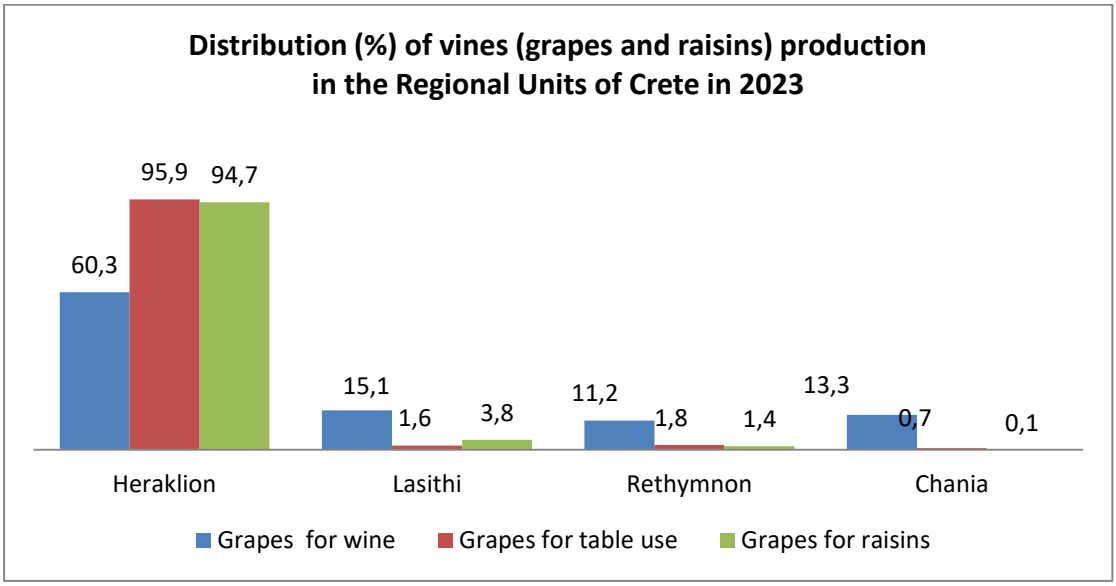


Figure 4.27 Distribution of vines (grapes and raisins) production in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

Concerning the production of must in Greece in 2023, 256.909 tons of must were produced, whereas in Crete the production of must was 36.196, constituting 14,1% of the total production of must in Greece. Regarding the production of must per Regional Unit of Crete, Heraklion produced 19.345 tons of must, constituting 53,4% of the total production of must in Crete; Chania followed with 17,5%, then Lasithi with 14,6% and Rethynon with 14,5%.

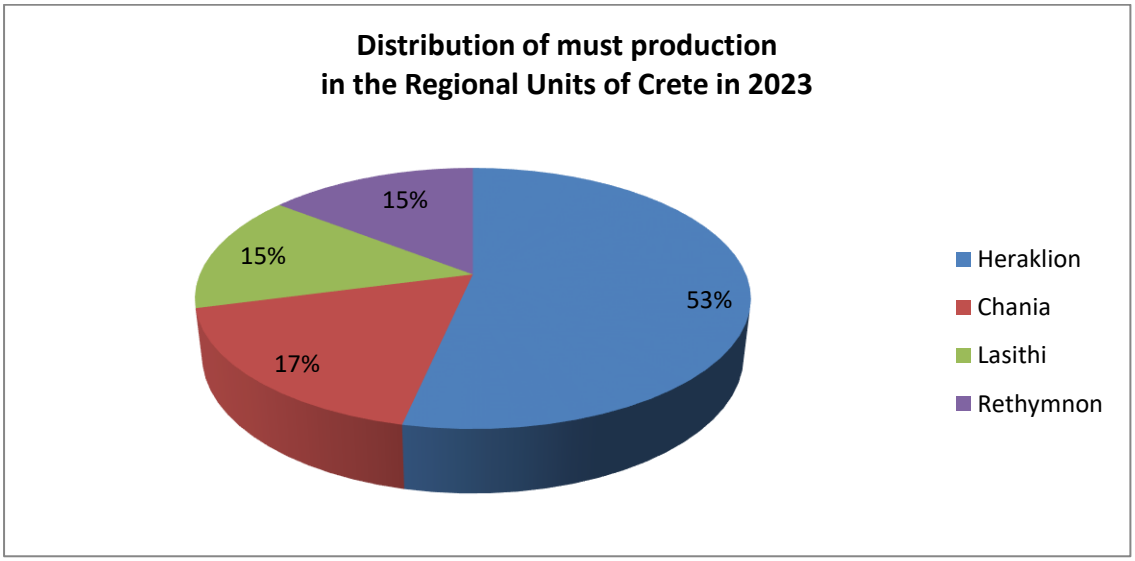


Figure 4.28 Distribution of must production in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.5 Garden area in Crete and Greece

In Greece, in 2023 garden area comprised 444.523 stremmas, having a decrease of 1,4% compared to 2022, when it was 451.021 stremmas. Compared to 2011, there was a decrease in 2023 by 56% reaching 1.004.561 stremmas, which was the highest number of stremmas with garden area during the period 2011-2023. From 2011 till 2020 there was a continuous decrease by 56% of garden area going down to 442.787 stremmas, which was the lowest number of stremmas of garden area in Greece during the period 2011-2023.

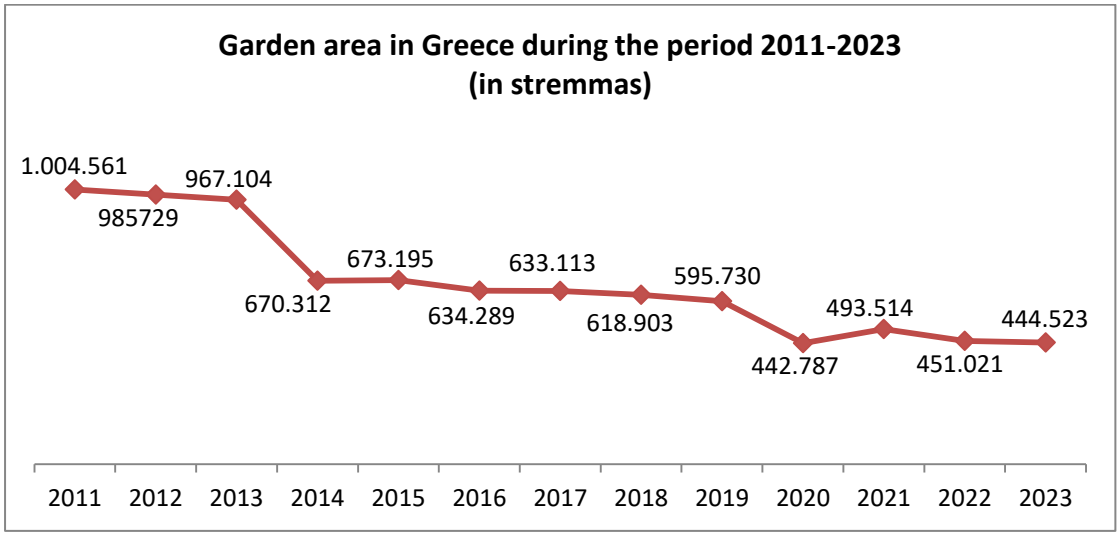


Figure 4.29 Garden area in Greece during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

In Crete, in 2023 garden area comprised 45.468 stremmas, having a decrease of 2,3% compared to 2022, when it was 46.542 stremmas. Compared to 2011, there was a decrease in 2023 by 47% reaching 85.037 stremmas, which was the highest number of stremmas with garden area during the period 2011-2023. From 2011 till 2020 there was a decrease by 48% of garden area going down to 44.419 stremmas, which was the lowest number of stremmas of garden area in Crete during the period 2011-2023.

Comparing the evolution of garden area in Crete and Greece, during the period 2011-2023 the decrease of stremmas was much higher in Greece than in Crete. In 2023, Crete constituted 10,2% of the total stremmas of garden area in Greece.

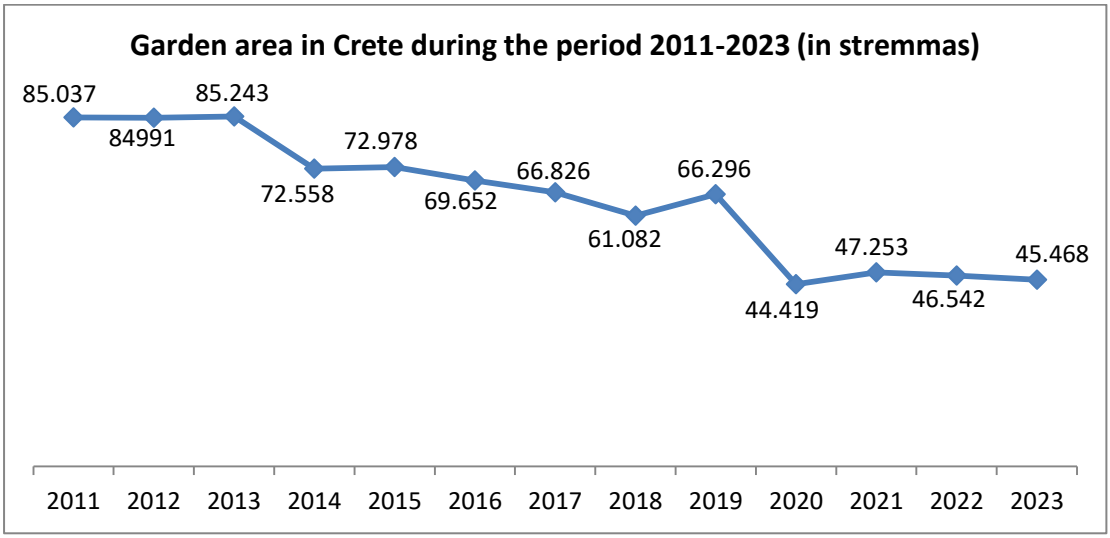


Figure 4.30 Garden area in Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

Garden area comprises horticultural land (broccoli, cabbages, cauliflowers, spinach, leeks, onions, garlic, lettuce, carrots, tomatoes, okras, strawberries, cucumbers, eggplants, peppers, among others) and ornamental plants, seedbeds, and nurseries. In Greece in 2023, the distribution of the total stremmas of garden area comprised 95% horticultural land and 5% ornamental plants, seedbeds, and nurseries. 20% of the area under vegetables is land under vegetables in greenhouses. In Crete in 2023, 98% consisted of horticultural land and 2% with ornamental plants, seedbeds, and nurseries. The percentage of garden area under vegetables which is land under vegetables in greenhouses is much higher in Crete with 70%. Moreover, Crete constituted 37% of the land under vegetables in greenhouses all over Greece.

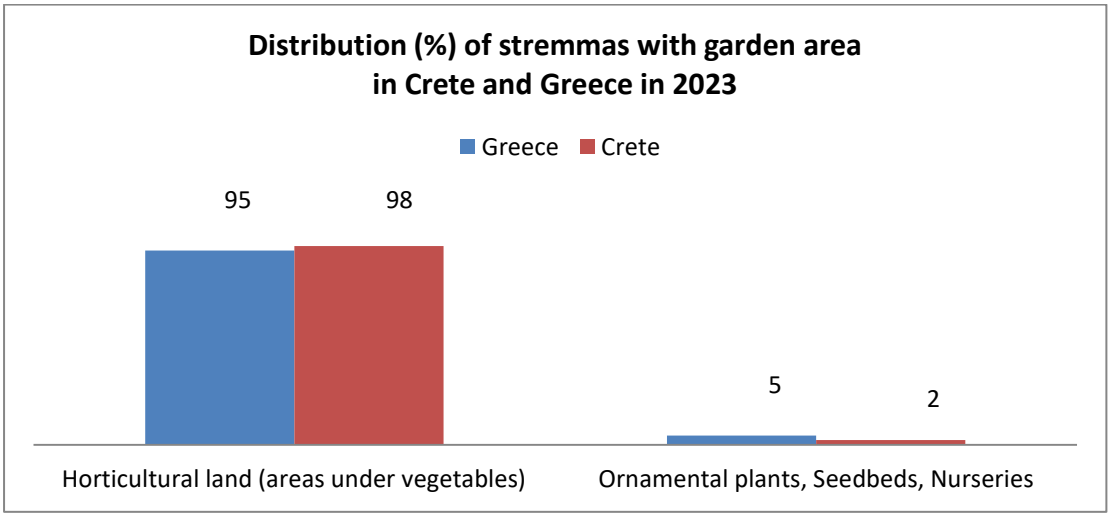


Figure 4.31 Distribution of stremmas with garden area in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

4.5.1 Garden area in the Regional Units of Crete

In the Regional Unit of Lasithi, in 2023 the garden area comprised 18.091 stremmas, having an increase of 9% compared to 2022, when it was 16.600 stremmas. Compared to 2011, there was a decrease in 2023 by 15%, reaching 21.174 stremmas, which was the highest number of garden area stremmas during the period 2011-2023. From 2011 till 2016 there were low annual decreases and from 2016 till 2018 the decrease was higher by 43% going down to 11.230 stemmas which was the lowest number of garden area stremmas during the period 2011-2023. After that year there was an annual high increase in 2019 by 74%.

In the Regional Unit of Heraklion, in 2023 the garden area comprised 17.007 stremmas, having a decrease of 1,4% compared to 2022, which was 17.246 stremmas. Compared to 2011, there was a higher decrease in 2023 by 54%, reaching to 36.970 stremmas, which was the highest number of garden area stremmas during the period 2011-2023. From 2013 till 2020 there was a continuous decrease by 60% going to 15.217 stremmas, which was the lowest number of garden area stremmas during the period 2011-2023. From 2020 till 2022 there was a continuous increase by 13%.

In the Regional Unit of Chania, in 2023 the garden area comprised 6.006 stremmas, which was the lowest number of garden area stremmas during the period 2011-2023, having a decrease of 24% compared to 2022, when it was 7.917 stremmas. Compared to 2011, there was a higher decrease in 2023 by 64%, reaching 16.692 stremmas, which was the highest number of garden area stremmas during the period 2011-2023. From 2011 till 2019 there was no significant change. From 2019 to 2020 there was an annual high decrease of 59% going down to 6.607 stremmas.

In the Regional Unit of Rethymnon, in 2023 the garden area comprised 4.364 stremmas, having a decrease of 8,7% compared to 2022, when it was 4.779 stremmas. Compared to 2011, there was a higher decrease in 2023 by 57%, reaching 10.201 stremmas, which was the highest number of garden area stremmas during the period 2011-2023. From 2011 till 2021 there was a continuous decrease of 73%, going down to 2.722 stremmas which was the lowest number of garden area stremmas during the period 2011-2023.

In 2023, the Regional Unit of Lasithi constituted 39,8% of the total stremmas of garden area in Crete; Heraklion followed with 37,4%, then Chania with 13,2% and Rethymnon with 9,6%.

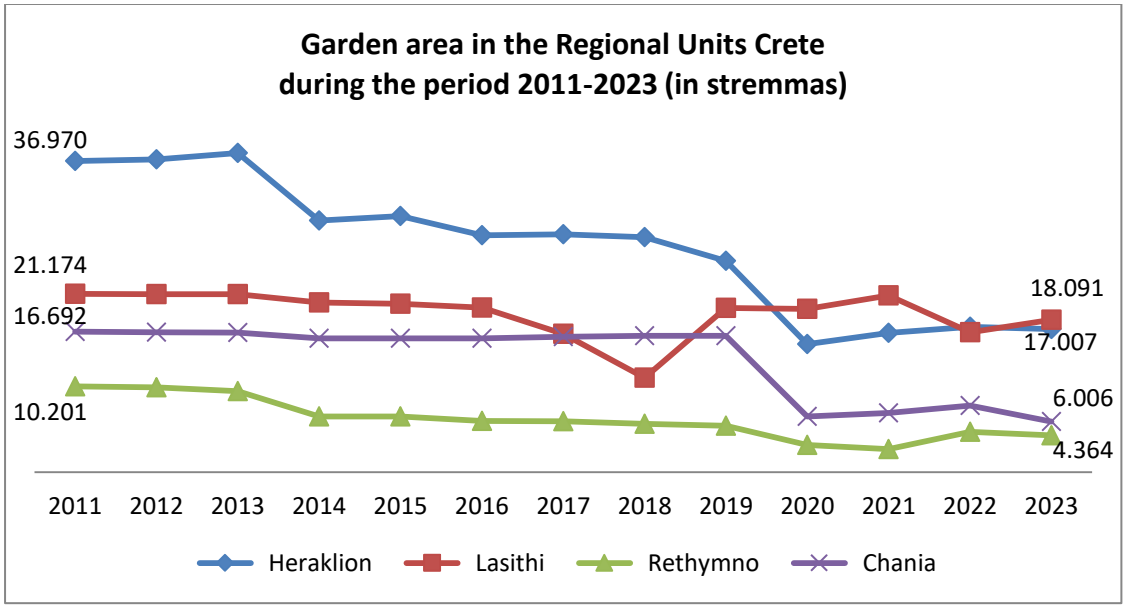


Figure 4.32 Garden area in the Regional Units Crete during the period 2011-2023
Source: Hellenic Statistical Authority, 2026

In all the Regional Units of Crete, horticultural land (areas under vegetables) constituted very high percentages from 96%-99%.

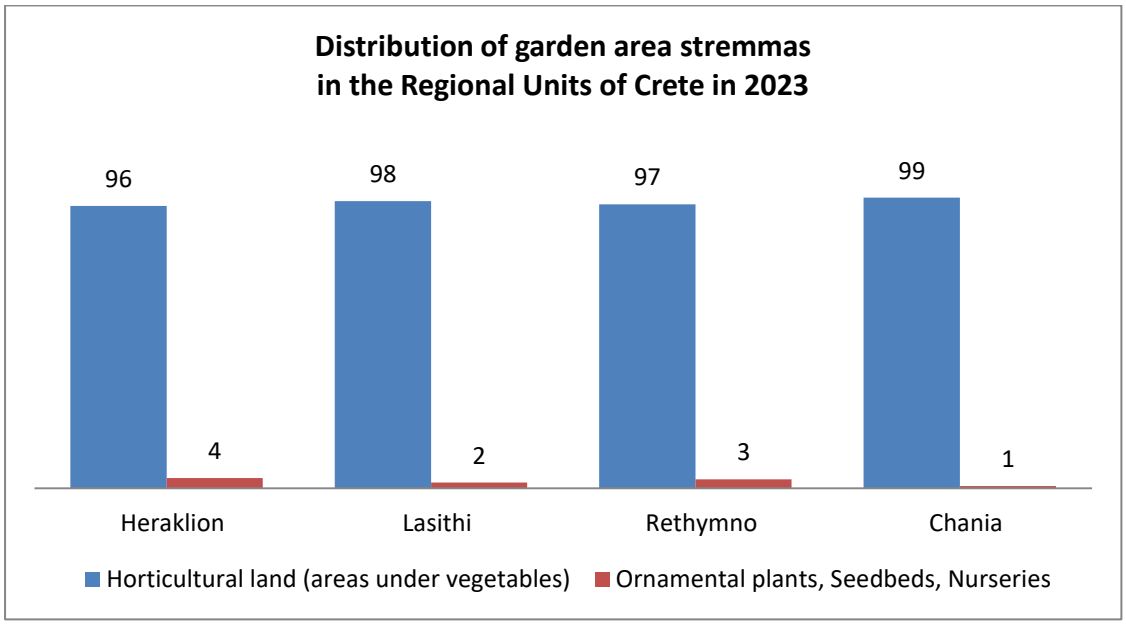


Figure 4.33 Distribution of garden area stremmas in the Regional Units of Crete in 2023
Source: Hellenic Statistical Authority, 2026

4.5.2 Production of garden area in Crete and Greece

In 2023 in Greece the production of garden area products was 1.620.032 tons derived mainly from tomatoes (42%), cucumbers (13%) and strawberries (7%), whereas in Crete the production of garden area products was 451.361 tons derived mainly from tomatoes (43%), and cucumbers (32%). Crete constituted 28% of the total production of garden area products in Greece. Moreover, regarding the production of greenhouse products in all over Greece, Crete produced 69% of all the tomatoes, 71% of the cucumbers, 70% of the eggplants and 81% of the peppers.

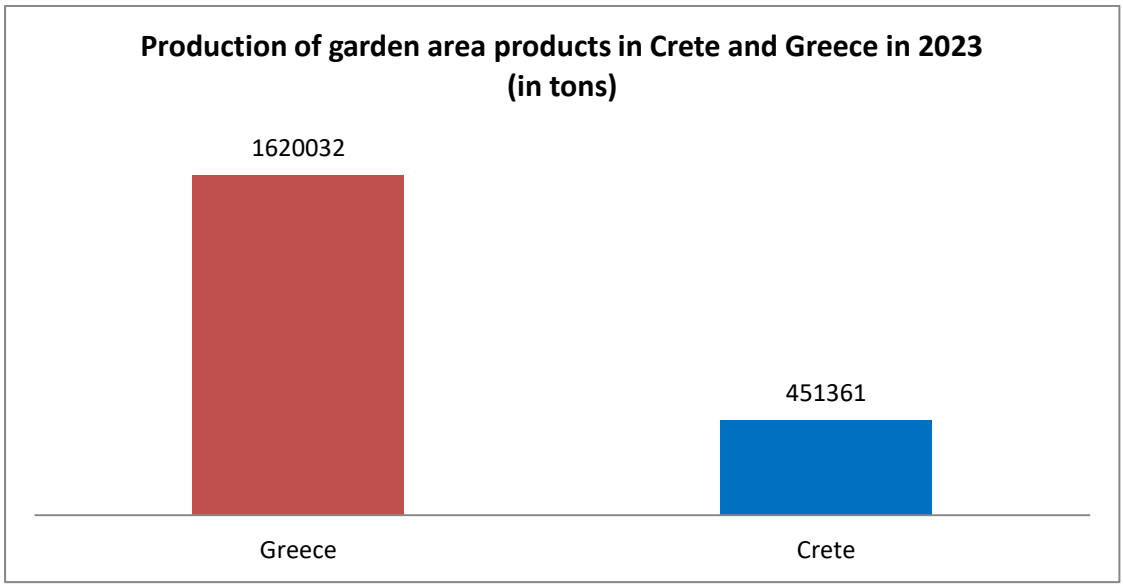


Figure 4.34 Production of garden area products in Crete and Greece in 2023
Source: Hellenic Statistical Authority, 2026

Regarding the production of greenhouse products, Lasithi produced the most from all over Crete and Greece. Specifically, Lasithi produced 69,6% of all the greenhouse tomatoes grown in Crete, followed by Chania with 18%, Heraklion with 11%,6 and Rethymnon with 0,8%. Lasithi produced the 79,8% of all the greenhouse cucumbers grown in Crete, followed by Heraklion with 17,8%, Chania with 1,8% and Rethymnon with 0,6%. Lasithi produced 65,5% of all the greenhouse eggplants grown in Crete, followed by Heraklion with 32,1%, Chania with 1,8% and Rethymnon with 0,5%. Lasithi produced 78,6% of all the greenhouse peppers in Crete, followed by Heraklion with 19,7%, Chania with 1,4% and Rethymnon with 0,3%.

4.6 European Labels as quality schemes for agricultural products and foodstuffs

Based on the Greek Ministry of Rural Development and Food, in 1992 according to regulation 2081/92, the European Union first adopted the system for the protection of geographical indications and the designations of origin of agricultural products and foodstuffs, and according to the regulation 2082/92, the rules on the certificates of the specific character of agricultural products and foodstuffs. In 2006, in order to improve the system, the above regulations have been replaced by regulations (EC) 510/06 and (EC) 509/06 respectively, without changing their scope and feasibility.

By Regulation (EE)1151/2012 of 21 November 2012 on quality schemes for agricultural products and foodstuffs, the above-mentioned regulations ((EC)509/2006 and (EC)510/2006) are merged into a single legal framework. Within this regulation, other quality schemes have been added such as optional quality terms like "mountain product", "product of island farming", and others.

In accordance with the aforementioned regulations and under the reorientation of the Common Agricultural Policy (CAP), farmers are encouraged to switch to forms of integrated rural development through the diversification of rural production. Furthermore, it is possible for producers (especially in disadvantaged and remote areas) to easily promote their products with special characteristics, achieving better market prices and thereby improving their income; on the other hand, consumers can buy quality products with guarantees for their production, processing and geographic origin.

4.6.1 Protected Designation of Origin (PDO)

	'Designation of origin' is a name which identifies a product: (a) originating in a specific place, region or, in exceptional cases, a country (b) whose quality or characteristics are essentially or exclusively due to a particular geographical environment with its inherent natural and human factors (c) with production steps which all take place in the defined geographical area

4.6.2 Protected Geographical Indication (PGI)

	'Geographical indication' is a name which identifies a product: (a) originating in a specific place, region or country (b) whose given quality, reputation or other characteristic is essentially attributable to its geographical origin (c) which involves at least one of the production steps which take place in the defined geographical area

4.6.3 Traditional Speciality Guaranteed (TSG)

	A name shall be eligible for registration as a 'traditional speciality guaranteed' where it describes a specific product or foodstuff that: (a) results from a mode of production, processing or composition corresponding to traditional practice for that product or foodstuff; or (b) is produced from raw materials or ingredients that are those traditionally used

4.6.4 European Labels as quality schemes for agricultural products and foodstuffs in Crete

Based on the Department of PDO, PGI TSG of the Directorate of Quality Systems and Organic Agriculture of the General Directorate of Food of the Ministry of Rural Development and Food, in the Region of Crete, the following products have been awarded as P.D.O. or P.G.I.:

Olive oil: Viannos Herakliou Kritis olive oil (PDO), Peza Herakliou Kritis olive oil (PDO), Archanes Herakliou Kritis olive oil (PDO), Extra virgin olive oil Thrapsano (PDO), Messara olive oil (PDO), Chania Kritis olive oil (PGI), Kolymvari Chanion Kritis olive oil (PDO), Apokoronas Chanion Kritis olive oil (PDO), Extra virgin olive oil Selino Kritis (PDO), Vorios Mylopotamos Rethymnis Kritis olive oil (PDO), Sitia Lasithiou Kritis olive oil (PDO), Kritsa olive oil (PGI).

Cheese: Graviera Kritis (PDO), Xynomyzithra Kritis (PDO), Pichtogalo Chanion (PDO), and Xygalo Sitias (PDO).

Other agricultural products: Throumba Ampadias Rethymnis Kritis (PDO), Oranges of Maleme Chanion Kritis (PDO), Cretan rusk (PGI), Stafida Soultanina Kritis (PGI) and Pefkothymaromelo Kritis (PDO).

Moreover, based on Wines of Crete, the following wine zones have been characterized as P.D.O. or P.G.I.: Archanes (PDO), Dafnes (PDO), Handakas-Candia (PDO), Malvasia Handakas-Candia (PDO), Peza (PDO), Sitia (PDO), Malvazia Sitias (PDO), Kissamos (PGI), Chania (PGI), Rethymnon (PGI), Iraklion (PGI), Lassithi (PGI), Crete (PGI).

4.7 Cretan Labels as quality schemes for agricultural products and foodstuffs in Crete

The "Agronutritional Cooperation of the Region of Crete" which was founded in March 2012, aims at supporting the agro-nutritional sector and the products of Crete, focusing on the strategic development of the primary sector and linking them directly to the tourism and catering establishments. The main advantage of this carrier is the institutional role that it holds, since it operates in the service of the farmer, the manufacturer, the merchant, the craftsman, for the local community and generally for the products, ensuring a relationship of trust and stability between them.

It has created and consolidated the brand "Crete – Land of values", "Cretan cuisine", "Cretan grocery", "Cretan brunch", "Cretan taste" and "Open wineries". It decisively and effectively contributes to the certification of the value of the products, thus increasing their demand in the hotels of Crete and generally to an overall projection of the Cretan Diet. By interlinking the primary sector with tourism, it supports the gastronomic and wine tourism of the island.

There are in total 171 certified businesses in Crete that have been awarded with the labels "Crete-Land of values", "Cretan cuisine", "Cretan taste" and "Cretan brunch". In Heraklion there are 83 certified businesses awarded with the above labels, in Chania there are 35 certified businesses awarded with the labels "Crete-Land of values" and "Cretan cuisine", with the same number and labels in Rethymnon, while in Lasisthi there are 18 certified businesses awarded with the labels "Crete-Land of values" and "Cretan cuisine". Moreover, there are 2 certified businesses that have been awarded with the label "Cretan grocery" which are located in Attica, outside of Crete.

Table 4.1 Certified Businesses that have been awarded with Cretan Labels

Cretan Labels	Chania	Rethymnon	Heraklion	Lasithi	Attica	Crete
Crete-Land of values	26	23	53	12		**114**
Cretan cuisine	9	12	24	6		**51**
Cretan taste			4			**4**
Cretan brunch			2			**2**
Cretan grocery					3	**0**
Total	**35**	**35**	**83**	**18**	**3**	**171**

Source: Processed data, Region of Crete, Agronutritional Cooperation, 2026

4.7.1 Crete-Land of values

crete κρήτη LAND OF VALUES ΓΕΝΕΤΕΙΡΑ ΑΞΙΩΝ	Crete-Land of vlaues was established in 2012 aiming to make the local products bearing this brand recognizable and even more competitive in terms of trade, while acquiring a strong commercial identity on the national and international markets. The brand name "Crete" manages to differentiate the agricultural products and generally the food of the island thanks to their production quality standards, their standardization, their supply level and their proper promotion, and makes them stand out in the preferences of the consumers.

There are in total 114 certified businesses in Crete that have been awarded with the label "Crete-Land of values" in their local products. In Heraklion there are 53 certified businesses, in Chania 26, in Rethymnon 23 and in Lasithi 12. There are in total 21 local products with 147 brands in Crete that have been awarded with the label "Crete-Land of values".

The most popular agricultural product is extra virgin olive oil with 34 brands in Crete having been awarded with the "Crete4-Land of values" label (14 in Heraklion, 8 in Chania, 7 in Rethymnon, and 5 in Lasithi). Dairy products follow with 22 brands in Crete (9 in Rethymnon, 8 in Heraklion, 4 in Chania, and 1 in Lasithi), then cheese products with 21 brands in Crete (8 in Heraklion, 8 in Rethymnon, 4 in Chania, and 1 in Lasithi), and fruit and vegetables with 9 brands in Crete (3 in Chania, 3 in Heraklion, and 3 in Lasithi).

Other significant agricultural products are honey with 6 brands in Crete (3 in Heraklion, 1 in each other Regional Unit), herbs with 5 brands in Crete (4 in Heraklion, 1 in Chania), olives with 3 brands in Crete (αall in Heraklion), rusk with 2 brands in Crete (1 in Heraklion, 1 in

Chania), wine with 2 brands in Crete (1 in Chania, 1 in Lasithi), raisin with 1 brand in Heraklion and tsikoudia with 1 brand in Lasithi.

Table 4.2 Local food products having been awarded with the label "Crete-Land of values"

Local food products	**Chania**	**Rethymnon**	**Heraklion**	**Lasithi**	**Crete**
Extra virgin olive oil	8	7	14	5	**34**
Dairy products	4	9	8	1	**22**
Cheese products	4	8	8	1	**21**
Fruit and vegetables	3		3	3	**9**
Traditional smoked products	1	4	4		**9**
Bakery and pastry products	4		4		**8**
Honey	1	1	3	1	**6**
Herbs	1		4		**5**
Meat products		4	1		**5**
Eggs		2	2		**4**
Olives			3		**3**
Organic products			3		**3**
Pies and Kalitsounia	2		1		**3**
Refreshmnets			2		**2**
Rusk	1		1		**2**
Vinegar	1		1		**2**
Water	1		1		**2**
Wine	1			1	**2**
Aloe products			1		**1**
Pasta			1		**1**
Raisin			1		**1**
Tsikoudia				1	**1**
Xerotigana	1				**1**
Total	**33**	**35**	**66**	**13**	**147**

Source: Processed data, Region of Crete, Agronutritional Cooperation, 2026

4.7.2 Cretan cuisine

crete κρήτη cretan cuisine κρητική κουζίνα	Mass catering businesses, such as restaurants, taverns, hotel restaurants and agro-tourism lodges that offer the special flavors of Cretan gastronomy and, of course, the unique Cretan hospitality, are renowned and rewarded by acquiring the "Cretan cuisine" brand. The primary objective is to render the "Cretan cuisine" brand as a seal of approval for consumers and to bring the primary sector of the island into direct contact with tourism, thus giving added value to the island of Crete and promoting it as the first in line as a gastronomic destination for all visitors.

There are in total 51 certified businesses in Crete that have been awarded with the label of "Cretan cuisine" in their restaurants/tavernas. In Heraklion there are 24 certified businesses, of which 17 are certified restaurants in hotels and 7 certified restaurants/tavernas. In Rethymnon there are 12 certified businesses, of which 10 are certified restaurants/tavernas and 2 certified restaurants in hotels. In Chania there are 9 certified businesses, of which 5 are certified restaurants/tavernas and 4 certified restaurants in hotels. In Lasithi there are 6 certified businesses, of which 3 are certified restaurants/tavernas and 3 certified restaurants in hotels.

4.7.3 Cretan taste

	This label will 'highlight the corner' of the buffets of all-inclusive-hotels, with local dishes, prepared with Cretan products that were produced in Crete. The "Cretan taste" dishes in the buffets of tourist accommodations give the visitor the opportunity to have a gastronomic experience of local flavours for breakfast, lunch and dinner. Recipes are made with products from Cretan farmers and breeders, unique in taste and nutritional value, "inspired" by the Cretan food menu and the values of the Cretan Diet. All are part of the culinary wealth of the island of Crete and its cultural tradition and heritage. People can discover Crete, its customs and traditions, and its people, through a dish of "Cretan taste".

There are in total 4 certified businesses in Crete that have been awarded with the label of "Cretan taste" and all of them are located in Heraklion.

4.7.4 Cretan grocery

	The "Cretan grocery store" brand certifies the retail outlets of Cretan products that meet all specifications, thus prompting customers to feel confident and secure for their purchases, as they choose products of high quality and high nutritional value. In these stores, local products are marketed under the brand "Crete", which further enhances their brand identity. Consequently, the "Cretan grocery store" brand illustrates and promotes retail outlets, as it guarantees the origin and quality of the products.

There are in total 3 certified businesses outside of Crete that have been awarded with the label of “Cretan grocery” and all of them are located in Attica.

4.7.5 Open wineries

crete κρήτη open wineries επισκέψιμα οινοποιεία	The brand “open wineries” highlights the sites of the island’s wineries which are accessible to the public, as part of an integrated plan to promote Cretan gastronomy. Furthermore, with winery labeling, it is aimed to develop wine tourism on the island through the promotion of local wine and indigenous varieties.

The members of the Wines of Crete, which includes the Heraklion Winemakers’ Network (the Regional Unit of Lasithi joined that Network) and the Chania-Rethymnon Winemakers’ Network, include 36 wineries all over the island (Wines of Crete, 2025).

The most wineries are located in Heraklion with 26 wineries, namely Alexakis Winery, Maragakis Winery, Paraskevas Winery, Silva Daskalaki Winery, Douloufakis Winery, Idaia Winery, Efrosini Winery, Union of Agricultural Cooperatives of Iraklion, Diamantakis Winery, Boutaris Wines, Titakis Wines, Minos Cretan Wines SA-Miliarakis Winery, Digenakis quality Wines, Domaine Paterianakis, Lyrarakis Wines-GEA SA, Michalakis Estate, Domaine Zacharioudakis, Fragospito Winery, Strataridakis Bros Winery, Aggelakis Winery, Amargiotakis Winery, Metaxari Winery, Menexes Winery, DAF Wines, Louloudis Winery and Haralabakis Winery.

In Chania there are 6 wineries, namely Pnevmatikakis Winery, Karavitakis Winery, Manousakis Winery, Monastery of Agia Triada, Dourakis Winery and Anoskeli Winery. In Rethymnon there are 3 wineries, namely Klados Winery, Kourkoulou Winery and Zoumperakis Winery. In Lasithi there is one winery, that of the Toplou Monastery.

4.7.5.1 Indigenous varieties of wine in Crete

Concerning the varieties, there are 11 indigenous wine varieties with unique aromas and unforgettable flavours.

The red varieties are the following:

Mandilari: Mandilari is considered to be the king of the native red varieties. This is where PDO (Protected Designation of Origin) Peza and Archanes wines draw their strength from.

Kotsifali: Soft and mellow, full of plum fragrances, the fleshy Kotsifali can be described as the Cretan equivalent of Merlot. Peza and Archanes are jointly responsible for the wonderful PDO wines.

Liatiko: This excellent red variety may be lacking in colour, but offers sweetness and character. The mind-blowing sweet and dry PDO Sitia and Dafnes wines are indisputable proof.

Romeiko: This variety gives lively red wines with high alcohol content, average acidity and variable colour due to the distinctive variegated grapes growing on numerous branches of the plant.

The white varieties are the following:

Vilana: Vilana makes an appearance in PDO Peza or Sitia wines with its fascinating fine aroma, its light taste and its refreshing lemon-scented acidity.

Vidiano: It has a unique apricot aroma, rich body, and transfixing creamy taste. These elements make Vidiano the rising diva of the Cretan vineyard and justify its qualifying as Greece's Viogner.

Dafni: The various aromas of Dafni bring to mind the well-known plant dafni (laurel), hence its name. it is quite a remarkable variety, whose scarcity is matched by the rarity of its taste character.

Plyto: Yet another variety recently saved from extinction, Plyto completes the mosaic of Cretan aromas and tastes with its refreshing acidity, its lemon scent and its lightness.

Thrapsathiri: A variety grown everywhere in Crete, offering balanced wines rich in flavour, this is where the white PDO Sitia wines draw their particular taste from.

Malvasia di Candia: This special clone of the aromatic Malvasia has returned to the fore, offering a real scented bouquet to both sweet and dry wines of the island.

Muscat of Spina: This clone of Muscat is a small-grape treasure. In fact, its thin skin skyrockets the fine character of the dry wines it offers.

4.7.6 Ancient monumental olive oil trees in Crete

Moreover, according to the Association of Cretan Olive Municipalities (ACOM), there are 14 monumental ancient olive trees in Crete:

- 6 ancient olive trees are located in Chania; more specifically: the monumental olive tree of Vouves, the monumental olive tree of Palaia Roumata, the monumental olive tree of Samonas, the monumental olive tree of Saint George, the monumental olive tree of Aerinos and the raised olive tree of Vatolakos.

- 4 ancient olive trees are located in Heraklion; more specifically: the monumental olive tree of Gortina, the monumental olive tree of Panasos, the monumental olive tree of Paliama and the monumental olive tree of Kamilari.

- 2 ancient olive trees are located in Rethymnon; more specifically: the monumental olive tree of Gre Ele and the monumental olive tree of Amari.

- 2 ancient olive trees are located in Lasithi; more specifically: the monumental olive tree of Kavousi and the sacred olive tree of Mathaina.



Figure 4.35 Monumental ancient olive trees in Crete
Source: Association of Cretan Olive Municipalities, 2026

CHAPTER 5

FOOD TOURISM

5.1 Introduction

Food tourism has been receiving increasing preference from tourists and attention from academicians as an alternative and significant form of tourism in the last years. Gastronomy has become one of the fundamental components in the selection of a tourist destination. According to Berbel-Pineda et al. (2019), among their main motivations in choosing their tourist destination, 15% of tourists are influenced by a place's gastronomy. A survey conducted by Hilton Worldwide (2014) found that roughly 36% of tourists visiting the Asia-Pacific region referred to food as a critical factor shaping destinations to which they would travel. Moreover, according to the World Food Travel Association (2020), visitors spend approximately 25% of their travel budget on food and beverages, which can be higher for food lovers and at expensive destinations. Furthermore, 53% of leisure travelers are food travelers and 81% of travelers learn about food and drink when they visit a destination, while 59% of travelers believe that food and beverages are more important when they travel than they were 5 years ago.

Those trends have given rise to another type of tourism, the so-called ‘food tourism’. Tourists are identified into different groups such as comfort seekers, moderates and authenticity seekers, based on the degree of interest in the authenticity of local food and similar gastronomic activities (Özdemir and Seyitoğlu, 2017); depending on the preference of their gastronomic experiences, they are identified as survivors, enjoyers, and experiencers (Cruz et al., 2019). The group of individuals whose primary reason for traveling is gastronomy, who are highly involved in related activities, are called gastronomes or food tourists/travelers, who may even travel far away for the purpose of a food/gastronomic experience (Hendijania and Chern, 2014).

The contribution made by local products to local sustainable development has been recognized. By consuming local food products, tourists not only satisfy their vital needs but also interact with local culture and support local development by stimulating demand (Madaleno et al., 2017). A more focused attitude on the local cuisine could have a major impact on higher planned expenditure of tourists, with a maximum behavioral loyalty, and

greater appreciation of the quality or degree of innovation (Perez-Galvez et al., 2017b). Schmitt, Galli et al. (2017) concluded that local products were ranked in first place compared to global ones, with the most significance placed on their socioeconomic and health dimensions. Moreover, the Mediterranean Diet could be used as a dynamic tool for promoting sustainable development, emphasizing among others the mythological aspect of the Mediterranean Diet for attaining cultural, economic and social development (Moro, 2016).

Food tourism can been characterized and promoted as an attraction (Chavarria and Phakdee-auksorn, 2017; Kumar, 2019; Okumus and Cetin, 2018; Perez-Galvez et al., 2017b; Sengel et al., 2015; Tsai and Wang, 2017), as a desire for knowledge (Li et al., 2018; Lopez-Guzman et al., 2014a; Lu and Chi, 2018; Pulido-Fernandez et al., 2019), as a way to explore local culture (Georgica, 2015; Lee et al., 2018; Littaye, 2016; Lourenco-Gomes et al., 2015; Madaleno et al., 2017; Mynttinen et al., 2015; Ng and Karim, 2016; Tanwar et al., 2018; Wijaya, 2019), as a way to discover the history (Bryla, 2015; Oktay and Sadigoglou 2018a,b; Renna et al., 2015), as a way to find out the authenticity (Chatzopoulou et al., 2019; Le et al., 2019; Ozdemir and Seyitoglu, 2017; Youn and Kim, 2017) and as the main motive to acquire experiences in touristic destinations (Balderas-Cejudo et al., 2019; Kim et al., 2019c; Matson-Barkat and Demondtrond, 2018; Sin and Minca, 2014).

5.2. Literature review

Food tourism is considered as an alternative form of tourism in comparison with mass tourism, attracting highly interested tourists (Douglas et al., 2001). According to Stewart et al. (2008), this type of tourism could act as the main attraction for visiting a destination. Food tourism plays a significant role in the development of touristic destinations as a way of supplementing tourism (Kumar, 2019) and in tourists' decisions, since around one third of tourists' budgets are dedicated to purchasing local food and beverages and participating in related food activities (World Health Organization, 2015).

The definition of what is 'local' is not clear. The Green Restaurant Association (2012) defined local food within a 100-mile radius from the production site, but this is not standard for every country (Meyerding et al., 2019). Main attributes of the local food which refer to

quality (Di Vita et al., 2019; Marchini et al., 2014), labeling (Bencivenga et al., 2016), certifications (Bentivoglio et al., 2019; Madaleno et al., 2017), uniqueness (Kohsaka, 2017), sustainability (Agyeiwaah and Zhao, 2024; Barlagne et al., 2015; Schmitt et al., 2017; Star et al., 2020; Vecchio et al., 2024), tradition, as well as sensory, health and security properties (Bryla, 2015; Derarege and Lovelock, 2021; Ting et al., 2017), willingness to pay (Berg and Preston, 2017; Rachao et al., 2023), perceived authenticity (Kim et al., 2017; Ruiz and Guzman-Parra, 2023), and neophilic/neophobic characteristics (Akin et al., 2023; Chang et al., 2022; Ji et al., 2016; Sivrikaya and Pekersen, 2020), are widely examined and their preferences against global and familiar products are discussed, especially for specific market segmentations such as that involving demographic characteristics (Lopez-Guzman et al., 2014a; López-Guzmán et al., 2014b; Perez-Galvez et al., 2017a; Sengel, et al., 2015), authenticity seekers (Ozdemir and Seyitoglu, 2017), experiencers (Cruz et al., 2019; Perez-Galvez et al., 2017a; Perez-Galvez et al., 2017b), slow food members (Lee et al., 2015b) and "snobbish" tourists (Lin et al., 2019).

The terms "food tourism", "gastronomic tourism", "culinary tourism", and "cuisine" are widely used and are also very often used interchangeably (Horng and Tsai, 2012). Since 2012, the term "culinary tourism" has been replaced by the more accepted terms of "food tourism" or "gastronomic tourism" (Balderas-Cejudo et al., 2019). Hall and Sharples (2003) tried to differentiate the meanings of the above terms, stating that gastronomic and cuisine tourism refer to the tourists whose primary motivation for travel is the high interest in local food, whereas culinary tourism refers to tourists who have a moderate interest in local food, taking up food-related activities as a secondary motivation once they have arrived at a destination in the framework of a wider range of lifestyle activities. Tsai and Wang (2017) identified food tourism as the tourists covering all the range of interests.

Both gastronomy and culinary tourism include activities like visiting a local farm, restaurant and other food establishments that provide local specialties on their menus while they are linked with the cultural characteristics of the host destination (Richards, 2002). Ellis et al. (2018) concluded that "food tourism" refers to food-related activities as physical and sensual experiences, "culinary tourism" is linked to the cultural knowledge and consumption acquired via this physical experience and "gastronomy tourism" concerns the place of food within the culture of the host region. All these categories have in common their interest in local food

and related activities and the pursuing of authentic and memorable experiences (Balderas-Cejudo et al., 2019).

Food tourism, which could be used as an umbrella for all the above terms, could be segmented in more categories according to the specific attributes of local food products in the touristic destination place. Thus, different forms of special interest tourism connected with food have been developed, such as slow food tourism (Georgica, 2015; Gines-Ariza et al., 2022; Lee et al., 2015b; Lee et al., 2014), halal food tourism (Al-Ansi and Han, 2019; Samori et al., 2016; Yousaf and Xiucheng, 2018), street food tourism (Chavarria and Phakdee-auksorn, 2017; Di Matteo, 2021; Jeaheng and Han, 2020; Pham et al., 2023; Praesri et al., 2022; Privitera and Nesci, 2015), gourmet tourism (Meneguel et al., 2019), ethnic food tourism (Lucas, 2023; Mohammed et al., 2016; Ting et al., 2019), traditional food tourism (Ng and Karim, 2016; Tanwar et al., 2018), salt tourism (Wu et al., 2015), olive oil tourism (Dancausa-Millan et al., 2022; Folgado-Fernandez et al., 2019; Lin et al., 2025; Millán-Vazquez de la Torre et al., 2017; Murgado-Armenteros et al., 2021; Pulido-Fernandez et al., 2022; Pulido-Fernandez et al., 2019), cheese tourism (Fuste-Forne and Filimon, 2025; Magri-Harsich et al., 2024; Moreno-Lobato et al., 2023), beer tourism (Di Matteo and Cavuta, 2016; Harrington et al., 2017; Kraftchick et al., 2014), wine tourism (Afonso et al., 2018; Alebaki et al., 2015; Byrd et al., 2016; Eustice et al., 2019; Garibaldi et al., 2017; Gomez et al., 2015a; Gomez et al., 2015b; Gomez-Carmona et al., 2023; Guzel et al., 2021; Lewis et al., 2021; Lopez-Guzman et al., 2014a; López-Guzmán et al., 2014b; Marco-Lajara et al., 2023; Martins et al., 2017; Mora et al., 2025; Niklas et al., 2022; Perez-Galvez et al., 2017a; Song et al., 2019; Thanh and Kirova, 2018; Torres et al., 2021), rural gastronomic tourism (Kim, et al., 2019b; Yang et al., 2024a), religious food tourism (Peralta et al., 2024; Sgroi, 2021), green tourism (Lita et al., 2014) and responsible tourism (Sin and Minca, 2014; Wan et al., 2025).

Several researches regarding food tourism have taken place in historical cities (Agyeiwaah and Zhao, 2024; Cruz et al., 2019; Durmaz et al., 2022; Hernandez-Rojas et al., 2021; Lopez-Guzman et al., 2014a; Madaleno et al., 2017; Perez-Galvez et al., 2017a; Perez-Galvez et al., 2017b; Rodriguez-Gutierrez et al., 2020; Sengel et al., 2015; Tsai and Wang, 2017; Yu and Sun, 2019), districts (Zhang et al., 2018), popular food & wine regions (Gaetjens et al., 2023; Lourenco-Gomes et al., 2015; Mynttinen et al., 2015; Recuero-Virto & Arrospide, 2024;

Renna et al., 2015; Torres-Pena et al., 2025; Wondirad et al., 2021), villages (Wu & Yang, 2023; Xiong and Brownlee, 2018) and "gastronomic" countries (Hsu et al., 2022; Kohsaka, 2017; Littaye, 2016; Ng and Karim, 2016; Tanwar et al., 2018; Wijaya, 2019).

Regarding the characteristics and the behavioral intention of tourists, studies have taken place in food service establishments such as restaurants (Bertan, 2020; Choe and Kim, 2019; Croitoru et al., 2024; Filimonau and Krivcova, 2017; Fuste-Forne, 2021; Hernandez-Rojas et al., 2021; Huang, 2017; Lu and Chi, 2018; Matson-Barkat and Demondtrond, 2018; Orea_Giner et al., 2025; Sharma et al., 2014; Svec et al., 2023; Wu et al., 2019; Wu et al., 2016), Michelin restaurants (Kiatkaawsin and Han, 2019; Meneguel et al., 2019; Vargas-Sanchez and Lopez-Guzman, 2018), luxury restaurants (Chen and Peng, 2018), 4 & 5 star hotel restaurants (Chen et al., 2016; Ismail et al., 2016; Peng, et al., 2017; Svec et al., 2023), ethnic restaurants (Aybek and Ozdemir, 2022; Chatzopoulou et al., 2019; Kim et al., 2017; Liu and Mattila, 2015), green restaurants (Line et al., 2016), authentic restaurants (DiPietro et al., 2019), hot pot restaurants (Chen et al., 2014), pop-up restaurants (Lugosi et al., 2020; Taylor Jr et al., 2018), upscale restaurants (Basri et al., 2016; Daries et al., 2023), fast food restaurants (Osman et al., 2014), museum restaurants (Kim et al., 2021; Kim et al., 2020b), hotels (Berbel-Pineda et al., 2019; Bondzi-Ayeh, 2017; Nilashi et al., 2023), grocerants (Kim et al., 2019a), groceries (Kim et al., 2019b), premium food markets (Lee et al., 2019a), farmers' markets (Berg and Preston, 2017; Thompson, 2020), food tourism factories (Chien et al., 2018), food trucks (Shin et al., 2019; Wang, 2025), breweries (Kraftchick et al., 2014), wineries (Alebaki et al., 2015; Byrd et al., 2016; Fernades and Cruz, 2016; Martins et al., 2017; Park et al., 2019; Quintal et al., 2015), wine routes and tours (Festa et al., 2020; Mora et al., 2025; Wen and Leung, 2021), cellar door tasting rooms (Frost et al., 2020; McNamara and Cassidy, 2015; Sun and Drakeman, 2020), olive oil companies, mills, museums (Dancausa-Millan, 2022; Lin et al., 2025; Millán-Vazquez de la Torre et al., 2017; Murgado-Armenteros et al., 2021), halal food establishments (Tama and Voon, 2014), universities (Campell et al., 2014; Gomez-Carmona et al., 2023; Rahman and Reynolds, 2015) and festivals (Choo et al., 2022; Harrington et al., 2017; Lau and Li, 2019; Li et al., 2018; Muhammad et al., 2016a; Noguer-Junca and Crespi-Vallbona, 2025; Organ et al., 2015; Sung et al., 2016; Vajirakachorn and Chongwatpol, 2017; Vesci and Botti, 2019; Williams et al., 2015; Yang et al., 2020).

The choice of the food destination orientation depends on the tourists' motives (Afonso et al., 2018; Jia, 2020; Kim et al., 2019c; Kraftchick et al., 2014; Li et al., 2018; Lopez-Guzamn et al., 2014b; Rodriguez-Gutierrez et.al., 2020). Destination food image (Chang and Mak, 2018; Chen et al., 2023; Durmaz et al., 2022; Gorji et al., 2023; Lai et al., 2018; Lee et al., 2023; Okumus and Cetin, 2018; Park and Widyanta, 2022; Promsivapallop and Kannaovakun, 2019; Ruiz et al., 2023; Seyitoglu and Ivanov, 2020) is created by the initiatives of stakeholders' networks (Francioni et al., 2017; Musso and Francioni, 2015; Nguyen et al., 2019) to attract tourists by the appropriate marketing actions (Jalis et al., 2014; Jerez, 2023; Nelson, 2016; Perez-Priego et al., 2023; Picazo et al., 2025; Praesri et al., 2022; Thompson, 2020) that promote the culture (Cheng, 2023; Fuste-Forne and Filimon, 2025; Lopez-Guzman et al., 2014a; Ng and Karim, 2016; Tanwar et al., 2018), history (Oktay and Sadikoglou, 2018a,b), and authenticity (Cai et al., 2021; DiPietro et al., 2019; Kim et al., 2020a; Le et al., 2019; Osman et al., 2014; Ozdemir and Seyitoglu, 2017; Wang, 2025) of the destination, food service and local food products. Experiences (Cruz et al., 2019; Garcia-Perez and Castillo-Ortiz, 2024; Gomez-Carmona et al., 2023; Huang, 2017; Mora et al., 2021; Perez-Galvez et al., 2017a; Perez-Galvez et al., 2017b; Stone and Sthapit, 2024) could enhance satisfaction and consequently intentions to buy, visit and revisit a food service establishment and/or destination. Moreover, sustainable food tourism development could be attained, besides the increased and responsible intentions of tourists' behavioral outcomes, from sustainable policies (Bertella, 2020; Nave et al., 2021; Nguyen et al., 2019; Pellegrini et al., 2023; Roy et al., 2017; Star et al., 2020; Thomas-Francois et al., 2017) as well as by stakeholders for the enhancement of the economics, sociocultural and environmental benefits of the destination.

5.3 Bibliometric analysis

The first attempt to make a bibliometric analysis of food and gastronomy with specific theoretical and empirical implications was made by Okumus et al. (2018) in their review paper, where they examined 462 papers for the period 1976 -2016 from 16 Hospitality and Tourism journals, from which 131 papers were related to food tourism. Ellis et al. (2018) studied 164 papers from 50 journals for the period 1994-2017 in order to define the main categories of food tourism, namely motivation, culture, authenticity, management &

marketing, and destination orientation, undertaking a cultural anthropology approach by the use of the cognitive mapping process. Szpilko (2017) implemented another review paper, conducting bibliometric analysis and a network analysis in the field of the food tourism supply chain, including 212 publications, for the period 1993-2016.

In total, 290 papers from 44 journals have been selected from Elsevier for the period 2014-2025. After a thorough examination of all the published papers, only the ones that are related to food tourism focused on the local agricultural products were selected to be included in the analysis. A bibliometric analysis took place by segmenting the papers per journal, number of academic institutes and authors, countries where the papers were produced and where the research took place, type of research methods, demand and supply segmentation, type of local food products, food service providers and sustainability. An analysis using main approaches of tourism, and a model of sustainable food tourism development management is analyzed by taking into account both tourists' and stakeholders' perspectives.

More specifically, a holistic approach is implemented by identifying tourism approaches and a segmentation has also been made in three main categories, namely brand attributes of local food products, food service and destination characteristics, taking into consideration the main factors such as motives, experiences, values, beliefs and satisfaction that affect tourists' intentions to buy local food products, (re)visit food service establishments and food destinations. Stakeholders' network with the appropriate marketing initiatives for the promotion of local productst and the enhancement of the image of the place destination are also taken into consideration. Moreover, corresponding sustainability policies for the enhancement of sustainable development management in food tourism are also examined.

Going through all the papers, it was evident that the terms "food tourism" primarily, and "gastronomy tourism" in second place, were most commonly used instead of the terms "culinary tourism" and "cuisine". Although the determination of the term "local" for food remains inconsistent, it is preferred instead of conventional food by tourists who are seeking unique, original and quality characteristics. Furthermore, food tourism approaches are developed, considering local food tourism as an attraction for tourists, as a desire to increase their knowledge, to learn about the local culture, history, and authenticity, and as an

opportunity to obtain food memorable experiences motivated by push and pull factors to select a food destination.

Moreover, through the analysis of the relative papers, it was discovered that only few of the papers have used both qualitative and quantitative methodologies for the results' analysis and the papers that were focused only on international tourists were not the majority. Furthermore, there are more papers referring to the perspective of tourists (demand) than the perspective of local stakeholders (supply), and there are not many papers that are focused to both demand and supply sides, which could provide a more holistic approach. Moreover, the vast majority of the papers are focused on the tourist's behavioral loyal intention, which is the willingness to purchase/consume, to recommend and to revisit, depending on whether a local food product or a food service industry/destination is concerned. The interlinkages of the main factors such as motivations, knowledge, culture, history, authenticity, experiences, values, attitudes, subjective norms, satisfaction and involvement, are taken into consideration. Finally, although there are papers that support the concept of sustainability of food tourism, only a few of them consider all three main dimensions of sustainability - economic, sociocultural and environmental - in their analysis.

5.3.1 Number of papers on local agricultural products and food tourism published by journal

The majority of the papers, have been published in the journals "International Journal of Gastronomy and Food Science", "Tourism Management Perspectives", "Tourism Management", "International Journal of Hospitality Management", and "Journal of Destination Marketing & Management".

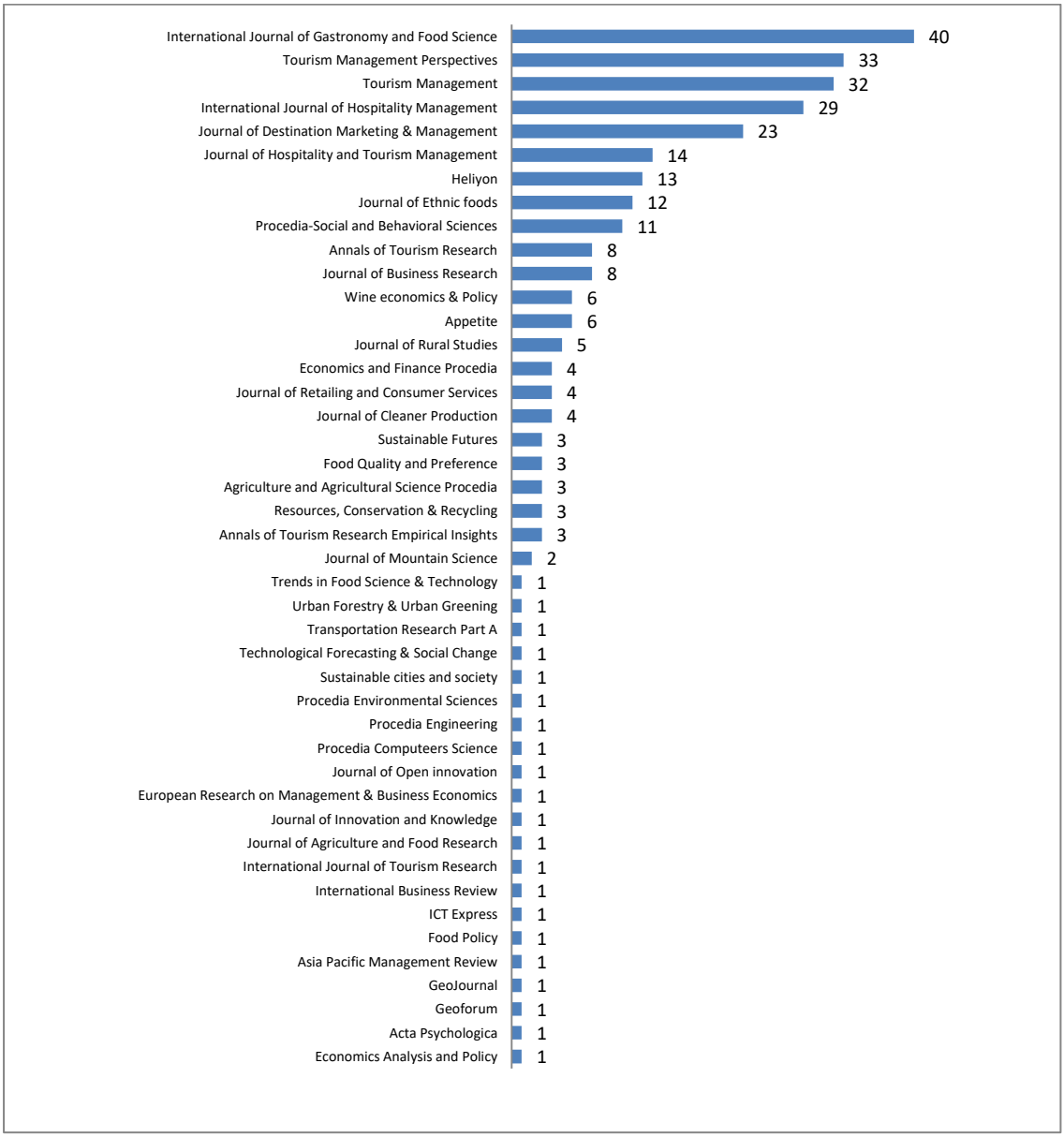


Figure 5.1 Number of papers on local agricultural products and food tourism during the period 2014-2025
Source: Author's own work

5.3.2 Number of papers on food tourism per Academic Institute and per author

Concerning the authors of the papers, 78% have been written by two, three or four authors, whereas nearly the same percentage (75%) of the papers are derived from one or two Academic Institutes.

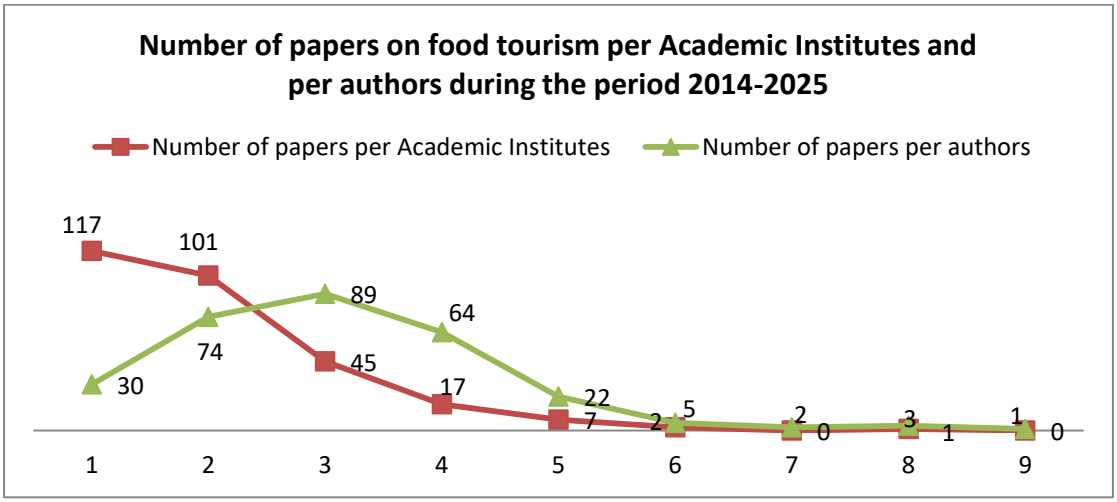


Figure 5.2 Number of papers on food tourism per Academic Institutes and per authors during the period 2014-2025
Source: Author's own work

5.3.3 Main countries with the greatest number of papers publications

Regarding the countries with the greatest number of published papers on local food and food tourism, 77% of the papers are coming from Academic Institutes located in Spain, China, Australia, USA, UK and Italy, with Spain being on the top of the list.

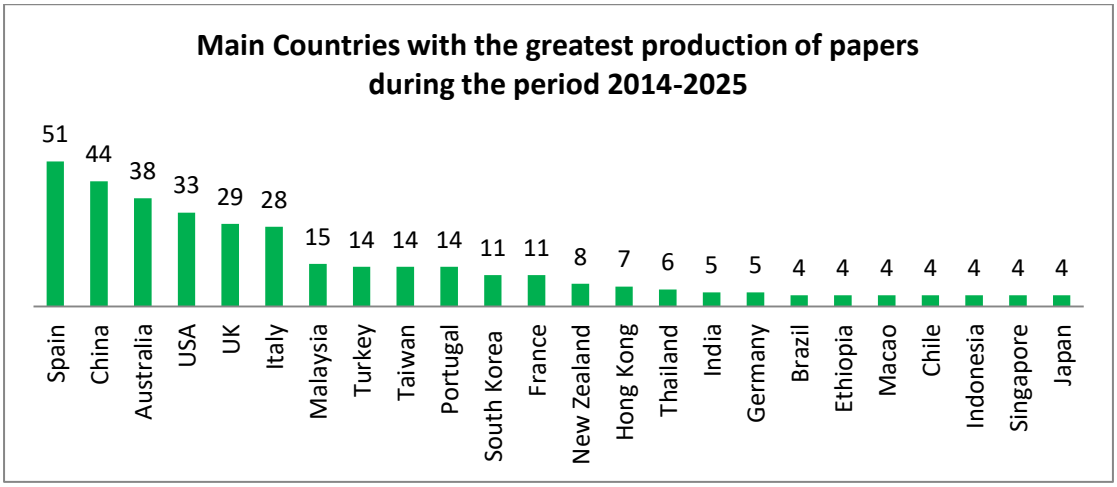


Figure 5.3 Main Countries with the greatest production of papers during the period 2014-2025
Source: Author's own work

5.3.4 Main countries of research

As far as the country of the research that took place is concerned, Spain is again the leader, followed by the same countries as those with the greatest production of papers, but with a different ranking, followed by Italy, USA, China and Australia. Moreover, the number of

those main countries of Research is lower than the number of their Academic Institutes, which mean that the researchers of those countries are making reasearch outside of their nations as well.

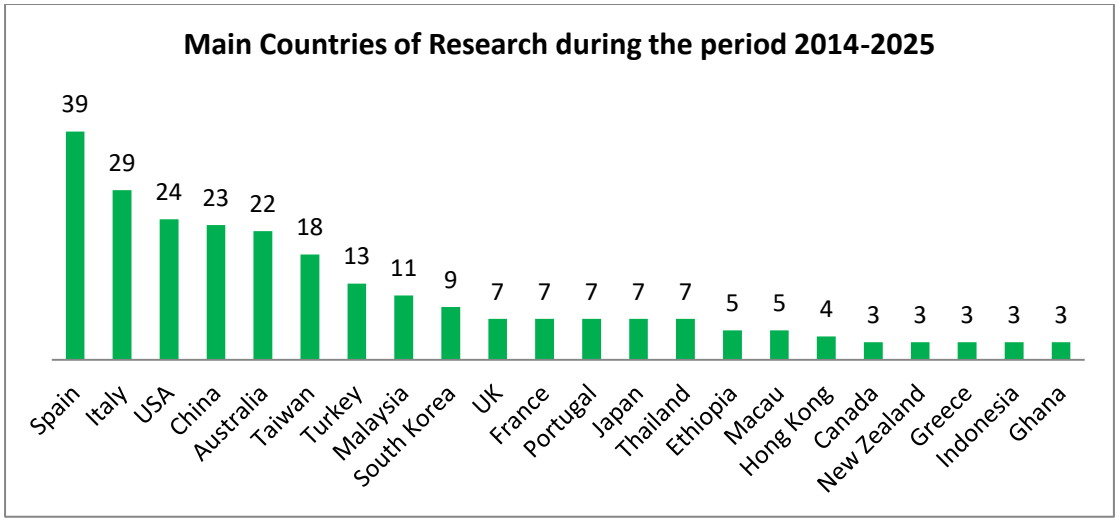


Figure 5.4 Main Countries of Research during the period 2014-2025
Source: Author's own work

5.3.5 Type of research

Out of 290 papers, the majority of them, i.e. 57% of the papers, were using quantitative analysis, 34% used qualitative analysis and 9% are characterized as hybrid, using both quantitative and qualitative analysis.

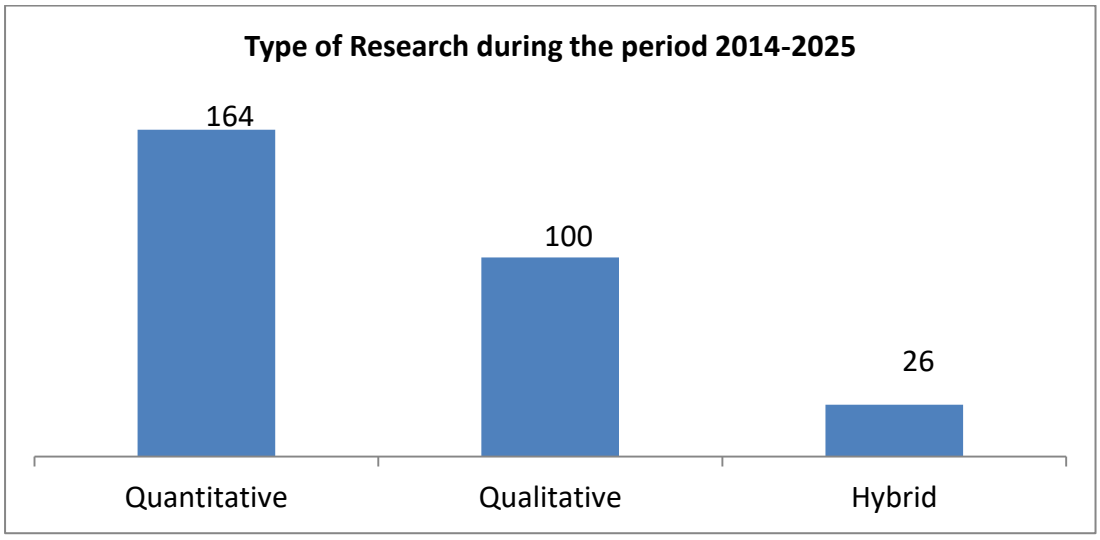


Figure 5.5 Type of Research during the period 2014-2025
Source: Author's own work

Concerning quantitative analysis, the method that was mostly used in almost half (48%) the papers was the structural equation model, implementing factor analysis (confirmatory and/or exploratory) and defining values of measures such as AVE, Cronbach a, and reliability analysis. ANOVA/ANCOVA/MANCOVA, cluster and principal component analysis, descriptive statistics and econometric/regression models were used almost equally (44%), mainly for the analysis of other papers. Methods such as the logit, Tobin and probit models, Becker–DeGroot–Marschak (BDM) procedure, multicriteria/Promethee model, and bivariate analysis were used in a few papers.

Regarding qualitative analysis, nentography/ethnographic/phenomenological methods, together with thematic and content analysis were used in almost half of the papers. Almost one out of four studies used case studies and interviews. One out of ten studies were implementing literature review, 8% were considered as conceptual studies and 12% used exploratory approach, mapping/positioning analysis, ZMET/Repertory grid method, Grounded theory analysis, text analysis, Gioia method and Fuzzy set method (QCA).

Regarding theories, the Theory of Planned Behavior (TPB) is the one that is most commonly and widely used. Three main factors are always evaluated in TPB, namely attitudes, subjective norms and perceived behavior control, in order to examine their influence towards behavior intentions.

Table 5.1 Methodologies

Quantitative methods	**%**
SEM, CFA/EFA, AVE, Cronbach a, CR	47,87
ANCOVA, ANOVA	14,36
Principal component analysis and cluster analysis	11,70
Only descriptive statistics	9,04
Econometric model and regression analysis	8,51
Logit	3,19
Bivariate analysis	2,13
Tobin and probit	1,60
Becker–DeGroot–Marschak (BDM) procedure	1,06
Promethee	0,53

Qualitative methods	%
Nentography method/ethnographic/phenomenological method	16,77
Thematic analysis	16,13
Content analysis	14,84
Case study	11,61
Interview	10,97
Review papers/Literature review	10,32
Conceptual study	7,74
Exploratory approach	3,87
Mapping/positioning analysis	2,58
ZMET/Repertory grid method	1,94
Grounded Theory Analysis and Text analysis	1,94
Gioia method and fuzzy set method (QCA)	1,29

Source: Author's own work

5.3.6 Demand and supply papers

Segmentation was also made according to demand (consumers, tourists) and supply (stakeholders). It was found that papers that studied the demand side were more than those studying supply. More specifically, 64% of the total papers referred to the demand side, 27% to the supply side and 9% to both the demand and supply sides. It is obvious that there is a lack of a holistic approach that takes both demand and supply into consideration in the implementation of a survey.

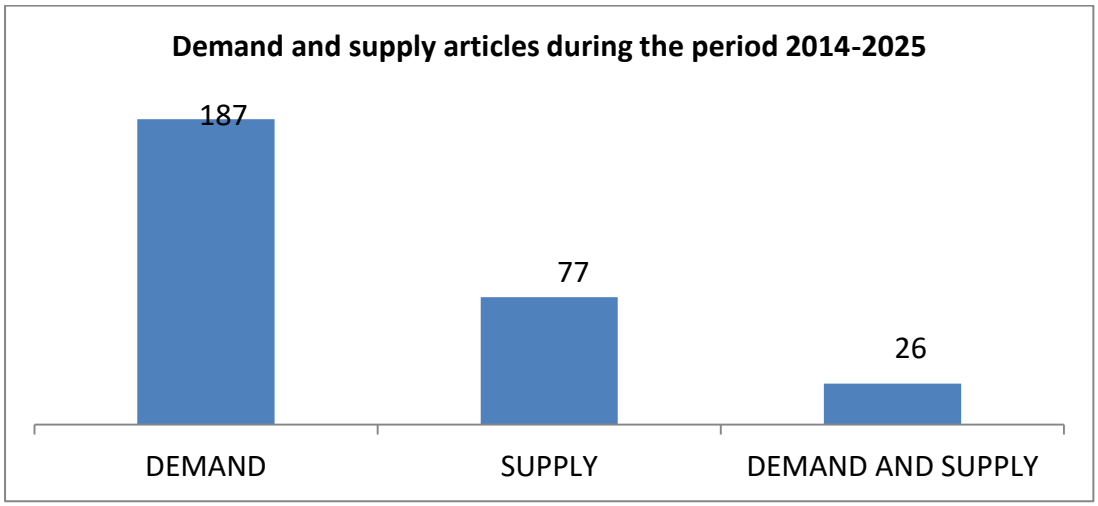


Figure 5.6 Demand and supply papers during the period 2014-2025
Source: Author's own work

Concerning the demand and demand & supply papers, half (51%) of the corresponding papers refer to national tourists/consumers, whereas 26% take into account both national and international tourists and only 23% deal with international tourists.

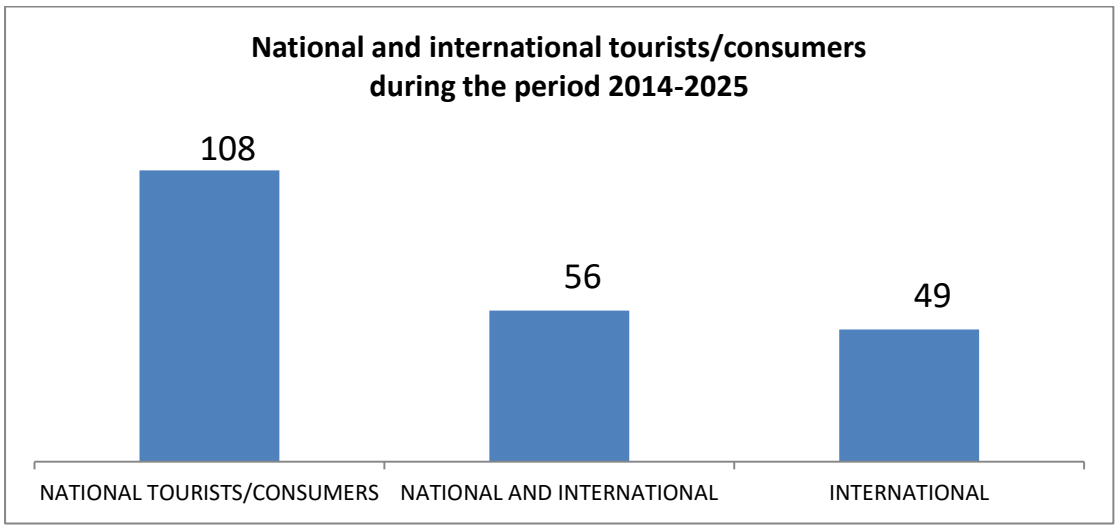


Figure 5.7 National and international tourists/consumers during the period 2014-2025
Source: Author's own work

5.3.7 Categorisation of papers per local agricultural product

The vast majority of the papers refer to food products at 74%, with wine following at 17%. Food and wine products consist of 6% of the papers, whereas olive oil and beer are mentioned in fewer papers.

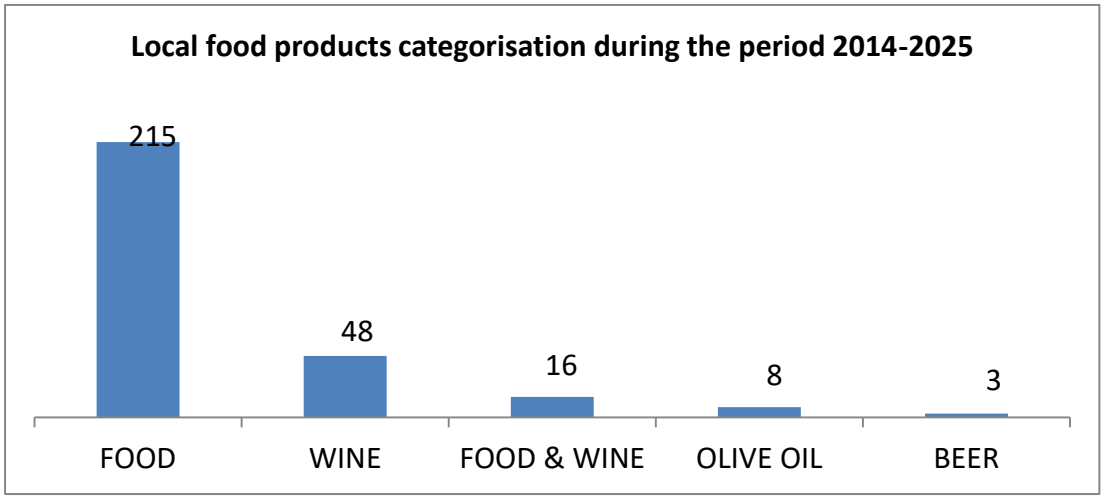


Figure 5.8 Local food products categorisation during the period 2014-2025
Source: Author's own work

5.3.8 Papers per food service provider

Concerning the food services that the studies took place, if we exclude 91 papers that refer generally to countries, regions, cities, villages and mountainous areas without specifying a food service establishment, and the fact that some papers refer to more than one food service, then out of 199 articles, 35% focused on restaurants including Michelin, ethnic, green, grocerants, authentic, upscale, hot pot/nostalgic and pop-up restaurants, 13% dealt with hotels, same is the percentage with wineries including cellar door tasting rooms and wine trails, 8% of the papers are focused on food festivals, 7% on tourist attractions, 6,5% on farmer market/local producers, 5,5% referred to other food establishments such as premium food markets, food tourism factories, food clusters, groceries, retail shops, halal food establishments, fast food, breweries, and olive oil companies. The same percentage dealt with distributors/retailers, 4,5% focused on street vendors, food trucks and 2,5% referred to universities.

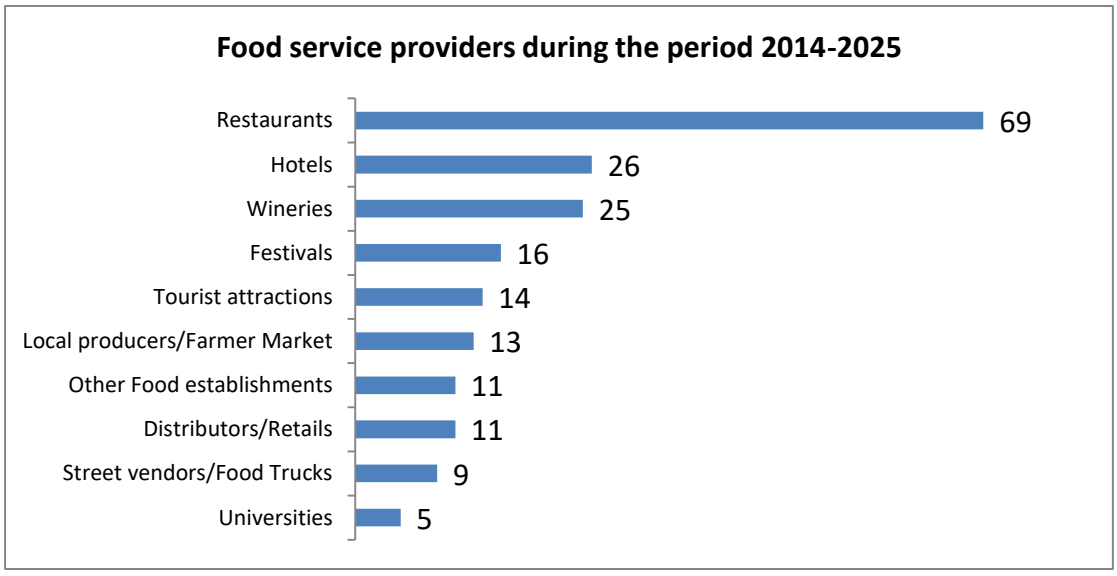


Figure 5.9 Food service providers during the period 2014-2025
Source: Author's own work

Out of the total number of papers, the vast majority are directly related to food tourism, whereas the rest are indirectly connected since they refer to local food consumption characteristics in culinary establishments from local people, an analysis which could also apply for potential tourists as well, and few articles deal with local products' attributes, which could also affect potential tourists' purchase decisions.

5.3.9 Papers per dimension of food sustainability

As far as sustainability is concerned, just one out of five papers and more specifically, 56 out of 290 papers (19%) are related to food sustainability. From those papers, 23% refer to all main sustainability (economics, socio-cultural and environmental) dimensions, 20% refer to economic sustainability and 16% refer to socio cultural sustainability. The same percentage (16%) refers to environmental sustainability, 14% refer to socio-economic sustainability, 9% refer to socio-environmental sustainability and 2% to econo-environmental sustainability.

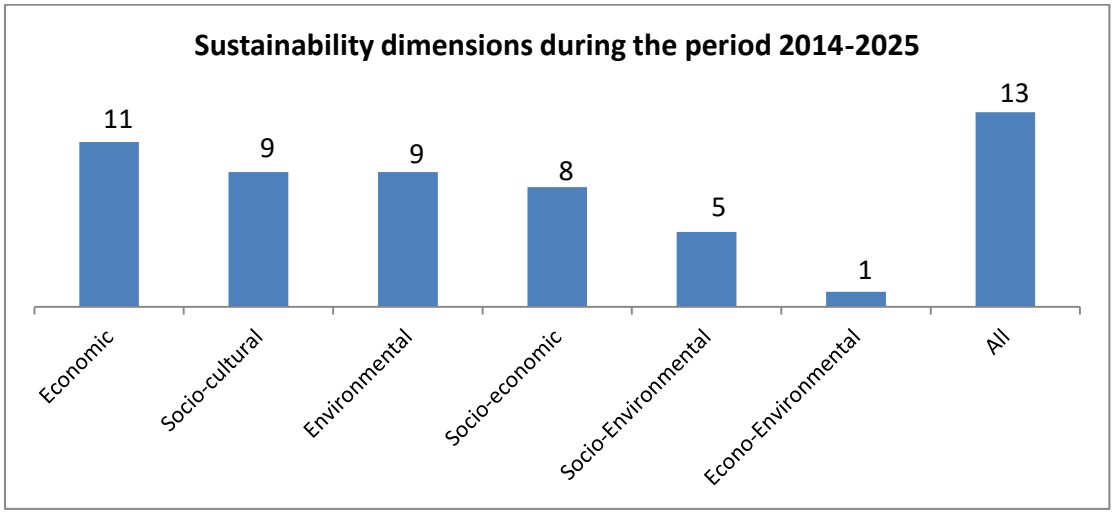


Figure 5.10 Sustainability dimensions during the period 2014-2025
Source: Author's own work

5.4 Food Tourism Approaches

Food tourism as a broad category, including beverage, has been characterized in the literature as an attraction, as a desire for knowledge, to explore local culture, history, authenticity, and as the main motive to acquire experiences in touristic destinations.

5.4.1 Food Tourism as an attraction

Local food, cuisine and gastronomy are quite often characterized as an attraction in the tourism industry. Perez-Priego et al. (2023) referred to local gastronomy as a destination tourist attraction, Perez-Galvez et al. (2017b) characterized gastronomy as an element of attraction in a tourist destination whereas Sengel et al. (2015) identified which tourists are

interested in local food as an attraction after analyzing the factors influencing local food demand in the tourism sector. While Lee et al. (2018) indicated that the factors involved in experiencing the cultural inheritance of local Taiwan cuisine through tourism include cultural attractions, cultural images, food histories, activity promotions, and experience functions, Kumar (2019) made a diversification among tourist attractions, stating that ‘’cuisine is an attraction that is available year round at any time of the day and does not very much depend on the weather conditions”. Street food represents a major tourist attraction in Thailand (Chavarria and Phakdee-auksorn, 2017), wine production in the Ningxia region is characterized as one of China’s three major geographical attractions (Wang et al., 2018), while the city of Istanbul could be better marketed if culinary resources, domestic and international cuisines were promoted as a major destination attraction (Okumus and Cetin, 2018). Moreover, a conceptual model was developed by Thompson (2020) that shows how farmers' markets may transition from community events into tourist attractions.

5.4.2 Food tourism as a desire to learn

Knowledge is an important factor in food tourism since tourists are hungry for knowledge about different gastronomic places in the world in the last years (Ng and Karim, 2016), significantly influencing the decision-making process (Pillai et al., 2019). The desire to learn about the world of olive oil and olive areas is the main motivation of special interest tourism, namely olive-oil tourism (Pulido-Fernandez et al., 2019), while for wine tourism, the primary reason of tourists who visit wineries is the desire to learn about the world of wine (Lopez-Guzman et al., 2014b). Knowledge of traditional culinary recipes and dishes could be seen as a chance for gastronomic innovation if new techniques are implemented in typical dishes to improve sensory and nutritional attributes (Renna et al., 2015). The protection of knowledge, based on a survey that took place in Michelin star restaurants in Spain, is stimulated by designing innovation techniques and creating gastronomical experiences (Vargas-Sanchez et al., 2018).

Even in the marketing mix, specific knowledge plays a critical role from the transfer of the 4Ps model (product, price, promotion, place) in the wine marketing mix, to the 4Es (expertise, evaluation, education, and experience) in consumer purchase behavior (Festa et

al., 2016). In the food service sector, if both local residents and tourists are highly involved in searching for food characteristics in order to acquire adequate knowledge from three menu stimuli (visual, verbal, stimuli control), then their attitudes will be positively affected and the purchase intentions will be increased (Lu and Chi, 2018). On the other hand, gastronomic knowledge was not deemed to be a significant factor to explain the willingness to pay more for luxury food experiences (Kiatkaawsin and Han, 2019). In a university foodservice environment, if students have sufficient knowledge concerning the attributes and the benefits of local products, it will enhance emotional interest; together with the high perceived product involvement, it will lead to an increase in the willingness to pay (WTP) for such products (Campell et al., 2014). WTP will be increased in emerging wine regions and specifically in wine tasting rooms, even if there is limited knowledge about the geographic region (Eustice et al., 2019). In the cherry blossom festival in the Tidal Basin area of the USA, enhancing tourists' knowledge/awareness about festival food characteristics is a major priority to increase loyalty and intentions to revisit (Li et al., 2018).

5.4.3 Food tourism and culture

Local products are characterized as authentic, symbolizing a specific place and culture (Madaleno et al., 2017). Lopez-Guzman et al., (2014a) in their research in the Sherry and Exrtamadura Spanish Regions concluded that food and wine are closely linked to culture, since cuisine and culture are the resources which tourists value most highly and desired most of all. Tourists are travelling from one country to another just to gain first-hand experience of local fare which constitutes a part of cultural tourism (Ng and Karim, 2016). In the survey that conducted in Istanbul, Yigit (2022) concluded that cooking classes can be a tool in learning a new culture. Visitors who are better informed, of high income and educational level, with regard to the cultural landscape of World Heritage Sites, such as the Douro Wine Region in Portugal, are more willing to take part not only in wine cultural activities but in maintaining the cultural heritage of the area as well (Lourenco-Gomes et al., 2015). In the survey conducted in the South Savo Region of Finland, it was found that the typical motivators for the consumption of local food from tourists were associated with its culinary heritage and an authentic novel experience of local culture, and not with environmental and economic topics (Mynttinen et al., 2015).

The Slow Food Movement is also characterized as a cultural initiative, since it aims to preserve traditional food preparation methods, meals, local farming and cuisine (Georgica, 2015). In a survey that took place in restaurants of Hong Kong regarding the cultural background and consumption intentions of tourists in the food service sector, the foreign tourist's satisfaction with tasting local food varied by cultural region, and the cultural profile of tourists partially moderates the relationships between the effect of tourists' local food consumption value on their perceptions and behaviors (Choe and Kim, 2019; Choe and Kim 2018). On the other hand, Lin et al. (2019) implemented a cultural taste analysis to examine tourists' food consumption, by making a segmentation of tourists of those who treat different products equally (omnivorous taste) and those who have a hierarchical attitude (distinctive taste). Cultural perspective, together with the duration of experience, should also be taken very carefully into consideration, concerning whether the unique value that consumers place on premium food markets significantly influence (or not) affective commitment (Lee et al., 2019a).

Gastronomic tourism is essentially about cultural anthropology by exploring a complex interweaving of gastronomy and cultural, social, and place identities through the practices of multiple stakeholders (Cheng, 2023). After designing an Indonesian food cultural map, Wijaya (2019) claimed that promoting Indonesian culinary tourism as special interest tourism should not only focus on the ample varieties of the traditional food but also the socio-cultural values behind the food itself, which should be more significantly emphasized. According to Meneguel et al. (2019), Michelin restaurants are providers of cultural elements by sharing the role along with other segments of the cultural industry through the transfer of overall experiences of cultural impressions of destiny.

5.4.4 Food Tourism and History

Recognition of the healthy culinary nutritional model of the Mediterranean Diet and the lifestyle of the Mediterranean regions is not only linked with cultural heritage but also with the history of each region (Moro, 2016; Renna et al., 2015). Oktay and Sadikoglou (2018a,b) analyzed the gastronomic cultures' impact on the African, Russian, Azerbaijani and Iranian cuisines through a literature review, pinpointing that historical cultural relations play a very

important role when evaluating the countries' cuisines. Emphasizing the unique value of history, Bryla (2015) stated that "We could copy all aspects of a food product, but it is impossible to change its history". The significance of history is highlighted as well from the high interest shown by tourists who prefer to visit historic cities to taste local agricultural products and gastronomy such as Caceres in Spain (Lopez-Guzman et al., 2014a), Tainan in Taiwan (Tsai and Wang, 2017), Oruro in Bolivia (Cruz et al., 2019), Cuena in Equador (Perez-Galvez et al., 2017a), Lima in Peru which is considered one of the main gastronomic leaders globally (Perez-Galvez et al., 2017b), Istanbul in Turkey (Sengel et al., 2015), the cities of Lisbon, Oporto, and Coimbra in Portugal which are included in the UNESCO World Heritage Sites (Madaleno et al., 2017), and Macau in Taiwan which is designated as the Creative City of Gastronomy since 2017 (Yu and Sun, 2019). Moreover, traditional multicultural villages such as Kampongs in Singapore (Xiong and Brownlee, 2018), historic districts such as the Confucian Temple of Nanjing (Zhang et al., 2018), historic regions such as the South Savo of Finland (Mynttinen et al., 2015) and the Demarcated Douro Region, one of the oldest demarcated wine regions globally, which is included in the list of World Heritage Sites (Lourenco-Gomes et al., 2015), are also in tourists' destination priorities.

5.4.5 Food Tourism and Authenticity

Authenticity is strongly correlated with the purchase and consumption of local food and the participation and involvement of relative activities. In their conceptual study, Ozdemir and Seyitoglu (2017) made a segmentation of tourists in three categories, namely comfort, moderates and authenticity seekers, with the last group to be the one consisting of people who are seeking authenticity in new food image destinations, consuming unfamiliar and novel local food, dining at authentic restaurants, participating and being actively involved in food activities, festivals and events, with the desire to learn more about local culture, tradition and characteristics. Bryla (2015) stated that perceived authenticity of a product is characterized by its origin, which includes place, history, local community and the raw/natural materials, while unfamiliar local ingredients, unique food names and storytelling about the origins of food increase consumers' perceptions of authenticity, which in turn enhance satisfaction and purchase intentions, especially for ethnic restaurants (Youn and Kim, 2017). The incorporation of notions of authenticity into the orders of worth is examined by Chatzopoulou

et al. (2019) in ethnic Greek restaurants by making a segmentation of customers in order to determine “hot” authentication; authentic representation of the characteristics of museum restaurant contributed to the perceived authenticity of the food tourist's dining experience (Kim et al., 2020a), while Le et al. (2019), in their review paper, focused on examining the authenticity of Things and the authenticity of the Self (demand) in restaurants by conceptualizing the authenticity of the organization (supply) to enhance the knowledge and the determinants of authenticity. Cai et al. (2021), examined how independent Chinese travellers perform authenticity through their dining experiences in Europe through the lens of performance theory, while waiting time was found to amplify the relationship between food authenticity and behavioral intention in food truck consumption (Wang, 2025).

5.4.6 Food Tourism and Motivations

Motives could be categorized as primary and secondary, push and pull factors, or as internal and physical factors. Gastronomy is considered one of the main motivations of travellers who select a specific destination (Garibaldi et al., 2017). Yu and Sun (2019) stated that motivation is related to the personal satisfaction tourists acquire from the experiences which influence their perceptions towards the destinations. Kim et al. (2019c) used an inductive phenomenological approach to discover the key motives of Japanese tourists who visit a village. In the wine sector, consumers’ motivation changes accordingly with the level of the wine quality (Di Vita et al., 2019), while rural winery visitors’ motivation significantly positively impacts their winery visit experience (Teng et al., 2022). Afonso et al. (2018) showed that primary motives such as core wine and education should be combined with a secondary motive such as participation in wine events and festivals, in order to increase the intention to return, while in a beer festival, only physical pull factors such as brewery experiences were significant for beer-seeking tourists (Kraftchick et al., 2014). Jia (2020) uncovered and compared the motivation and satisfaction of restaurant tourist customers coming from China and U.S. by investigating their online ratings and reviews, while Rodriguez-Gutierrez et al. (2020) highlighted that the importance of the culinary experience of the tourist in the choice of the destination mediates the effect that culinary motivations exercise on the satisfaction with the gastronomy in the Creative City of Popayán in Colombia.

5.4.7 Food tourism and experiences

Tourism is characterized as one of the main sectors for the exploration of customer experience (Matson-Barkat and Demondtrond, 2018). Tourists visiting distant places are interested in 'going local', having a real experience with local people and communities (Sin and Minca, 2014). In the last years, there is an increase in the number of travellers, who will travel even very far away in order to seek gastronomic experiences, the so-called gastronomes, foodies or food hunters, whose primary reason for traveling is food. In their study in Malaysia, Hendijani and Chem (2014) revealed that food hunting for gastronomes could be characterized as a psychological process starting from childhood, acquiring food experiences; due to those memories, they are motivated to continue seeking new ones. These food activity memories are coming back period by period, for "slow" tourists as well, characterizing slow travel not as a specific mode of transportation but as a mind-set (Georgica, 2015).

Regarding food services, the study of Kim et al. (2019a) was the first attempt to examine customer experience at grocerants (groceries and restaurants) in Korea; as a new form of food service that can maintain a competitive advantage, based on the experience economy, it emphasized the importance of delivering unique and memorable experiences associating the positive effects of entertainment and escapist experiences on brand prestige, customer perceived value and the influence of functional, hedonic, financial (and not social) aspects to loyalty. Entertainment dimensions were also predominant together with educational ones in the experience economy model that was used in wine regions of France to examine wine tourism experiences (Thanh and Kirova, 2018), while experience quality not only has a significant influence on customers' loyalty satisfaction and intention to revisit wineries in Portugal, but it is also the case that derived memorable experiences could attract new customers through recommendations by word of mouth (Fernades and Cruz, 2016). Gomez-Carmona et al. (2023) found out that by increasing the wine tourism experience, consumers improve their attitudes towards wine, their evaluation of extrinsic and intrinsic attributes and their loyalty towards different wines in Spain, while Esau and Senese (2022) demonstrate the impact of a sensory experience in a wine destination to establish positive and memorable experiences that provide meaning and a personal sense of identity, both of which drive tourism and subsequent visitation in Italy.

The review and synthesis of 60 quantitative, qualitative, and mixed studies conducted between 2015 and 2024 revealed that the study of Memorable Gastro-Tourism Experiences is nascent but active through a systematic literature review (Garcia-Perez and Castillo-Ortiz, 2024). A positive and significant linkage of culinary memorable experience factors with memorable local-food experiences was highlighted by Shoukat et al. (2023), whereas Stone and Sthapit (2024) conceptualized negative memorable food, drink, and culinary tourism experiences in USA.

In their survey carried out in Sarawak of Malaysia, Tama and Voon (2014) identified six components of customer emotional experience, namely spiritual assurance, pleasure, arousal, dominance, joy and acceptance, related to Halal food establishments that are significantly associated among each other and could enhance positive behavioural intentions. Street vendors, especially street food, contribute to authentic touristic gastronomic experiences, linking together food, place and tourism (Privitera and Nesci, 2015),

Concerning the degree of gastronomic experience, several segmentations of tourists are made. The older gastronomic tourists' group are considered as senior foodies, a niche market, who, especially the new generation, are very experienced travellers, have time and money to search, taste and buy local food products of high quality, prefer superior services and are interested in unique experiences (Balderas-Cejudo et al., 2019). The most common segmentations are usually in 3 categories, namely survivors, enjoyers and experiencers, where the last are more interested in local gastronomy and similar activities. Useful results have come out from different surveys conducted in Latin America. In Bolivia, the experiencers are looking to link gastronomy with cultural heritage for higher satisfaction (Cruz et al., 2019). On the other hand, in Lima of Peru, one of the gastronomical centres worldwide, culinary motivations of experiencers regarding new food experiences and socialization, and not the connection with cultural food heritage, contribute to a greater degree to gastronomic satisfaction (Perez-Galvez et al., 2017b), while in the survey of Mora et al. (2021) reveals the positive influence of culinary experiences on gastronomic satisfaction and loyalty to the destination, as well as an influence of gastronomic motivations on the value perceived and culinary experiences in Spain.

Finally, tourists' dining experiences in Taiwan, specifically experiential value, can be affected positively by chefs' image, staff service quality, and interaction with other customers in 4 & 5 star hotel restaurants (Chen et al., 2016), while differences in dining experiences for specialty local foods were observed between foreigners and local tourists in China, which are explained based on a content analysis from the cultural and contextual variables (Huang, 2017).

5.5 A conceptual framework of food tourism management

The ultimate target of tourists is the intention to buy, visit or recommend depending on whether there is a food product, a food service or a destination under examination. Based on their motives, tourists select a food destination to go to, a food service establishment to visit and specific local food products to consume. In those environments, culture, history and authenticity are already present there, but local stakeholders together with the active involvement of local residents, should take up the necessary and effective marketing activities in order to promote and enhance the image of the destination/food service and the brand name of the local food and beverage products. By the considerations of different characteristics and values of those environments, together with beliefs (attitudes, subjective norms, perceived behavior control), perceptions, emotions, desires and other tourist characteristics, the intentions to buy, visit and recommend are successfully examined. Moreover, experiences that are acquired during tourists' visit to those environments could affect the corresponding intentions depending on the level of satisfaction. On the other hand, by also developing the appropriate marketing policies by stakeholders' network, together with the responsible behavior of tourists, who have obtained an adequate level of knowledge, are well aware of and actively involved in all these aspects, a solid food tourism management could successfully be adopted and implemented.

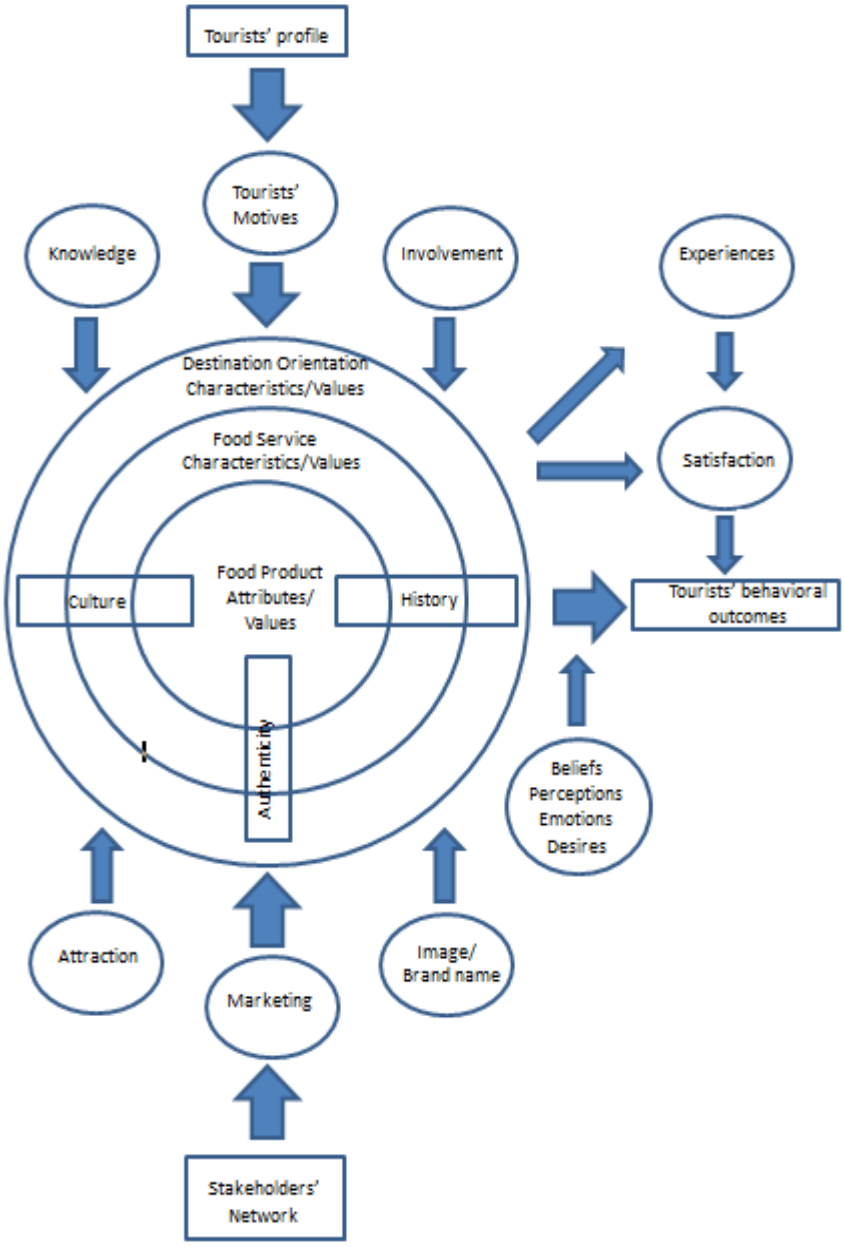


Figure 5.11 A conceptual framework of Food Tourism Management
Source: Author's own work

5.5.1 Tourists' approach

Tourists' behavioral outcomes are analyzed based on three segmentation categories, namely tourists' intentions to purchase local food products, to (re)visit & recommend food services and to (re)visit & recommend food destinations. The first category is considered as a subtotal of the second category whereas the first two categories are considered as a subtotal of the third category.

5.5.1.2 Local food attributes/brand and intentions to consume/buy/recommend

Tourists' intentions to consume/buy and recommend local food depend on local food attributes such as quality, freshness, identity, symbolic, locality, utility, price, health, sensory, safety concerns and table manners either directly through tourists' beliefs (attitudes, subjective norms, perceived behavior control), emotions, desires, perceptions or indirectly though experiences and satisfaction.

The characteristics and attributes of local food are very important for travellers and consumers and much stronger than motivational factors such as health concerns, cultural experiences, excitement, interpersonal relations, and sensory appeal (Madaleno et al., 2017). Moreover, based on the findings of Wu et al. (2016), communication and sensory appeal are not important either in predicting tourists' attitudes for local food as well. On the contrary, according to Bryla (2015), the characteristics that differentiate origin from conventional food depend mainly on sensory & health considerations, and links with local tradition, while Ting et al. (2017) showed that only health properties and sensory appeal could positively affect the intention to consume ethnic food for non-Dayak Malaysians. Health characteristics of agricultural products are ranked first among health-conscious consumers who are seeking organic rather than conventionally grown food in order to improve their quality of life (Rana and Paul, 2017), while the characteristics of healthiness and freshness of local products were specially valued as well by Russian tourists in Finland (Mynttinen et al., 2015). Batat et al. (2019) tried to connect health and the pleasure of food, stating that healthy eating should be considered through the utility of food as pleasure rather than as a health deterrent that could lead to consumers' food well-being.

Lin and Mao (2015) advocated the view that sensory, symbolic and utility attributes are the main characteristics of food specialties and souvenirs in order to be distinguished with an award, and Chen et al. (2022) found out that food souvenirs image contributes more strongly to purchase intention for food souvenirs through perceived tourist value than through destination brand. Moreover, tourists' diverse emotional responses were found to reflect specific and temporal aspects of tourists' local food experiences and explain tourists' tentative behaviors (Pham et al., 2023), on the other hand, Eustice et al. (2019) stated that sensory information provided in messages concerning wines had no impact on WTP, whereas wine awards/prizes contributed to a very high level of WTP, while most consumers were

sceptical and critical about wine awards and only those wines with the gold medal or the most prestigious characteristic will have a positive effect on their decision-making (Neuninger et al., 2017).

Antecedents may better explain and forecast attitudes and behaviors towards local foods, the benefits from local food and how consumers define local food (Lang and Lemmerer, 2019). According to Schmitt et al. (2017), distance from the production site was not important, and other characteristics of locality such as identity, control of local actors and know-how were proved to be more crucial factors. The production site does not seem to play a significant role in the study of Casini et al. (2016) about olive oil, since only one fourth of the sample showed a preference for the region of origin and the remaining percentage made their choices mainly by price. In their survey in Germany, Meyerding et al. (2019) discovered that consumers prefer local products, fresh and processed, irrespectively of the exact production and distance to consumers' home. According to Williamson and Hassanli (2020), the centrality of local food to tourists, which reflects how relevant the purchase decision is in relation to an individual's goals, values, and self-concept, is the most important factor in increasing experiential loyalty. Concerning new gastronomic trends, Turker and Suzer (2022) showed that tourists are not willing to consume molecular and fusion cuisines, however, tourists tend to consume foods that represent the local culture. Furthermore, the relationship between tourists' need for uniqueness and ethnic food purchase intention was serially and positively mediated by food neophilia and ethnic food involvement (Cengiz and Cengiz, 2023).

According to age and income characteristics, consumers are willing to substitute non-local for local food when the price is appropriate (Berg and Preston, 2017), while other consumers could pay a higher price for food only if the perceived quality is higher (Filimonau and Krivcova, 2017). Subjective norms and perceived behavior control also affect behavior intention in the consumption of unfamiliar local food in the USA by Chinese tourists, whereas safety concerns and table manners, depending on individual beliefs, affect tourists' attitudes towards local food (Wu et al., 2016). Perceived behavior control together with affection and satisfaction were the factors better predicting tourists' behavioral willingness for local street food in Phuket (Chavarria and Phakdee-auksorn, 2017), whereas perception of authenticity was found to be a significant predictor for slow tourism behavioral intentions in Korea after using an extended Theory of Planned Behaviour (TPB) incorporating the Theory

of Reasoned Action (Meng and Choi, 2016). Local food specialties could also be found outside the place of origin in food stores, permitting future travellers to have a taste of local tradition and enhance the perceived authenticity of the place of origin (Alderighi et al., 2016). On the other hand, Birch and Memery (2020) found out that there is an intention-behaviour gap, whilst future visitors had high intentions to purchase local food, past visitors purchased less than might be anticipated, most probably due to past visitors holding less favourable attitudes and beliefs than future visitors due to expectations not being met.

Memorable experiences such as cultural, innovative, educational, hedonic and adverse experiences can significantly affect tourists' willingness to recommend local foods (Adongo et al., 2015). Nostalgic labels increase consumers' purchase and consumption intentions as well by emphasizing the role of emotion that connects memories with past experiences (Zhou et al., 2019). The development of emotional attachment with agroproducts could also be promoted with agrotourism by enhancing the post-purchase behavior after tourists have been involved in various agrotouristic activities that could also contribute to the economic sustainability of an area when there is a long-term approach, since the corresponding economic benefits via post-purchase behavior are much bigger (Kim et al., 2019b).

5.5.1.3 Food service characteristics/image and intentions to revisit/recommend

Researches of branding food service in food tourism are limited (Tsai and Wang, 2017). Tourists' attitudes toward environmentally friendly services has significant influence on the overall image of hotels and restaurants, which in turn significantly affects revisit intentions, positive word of mouth and willingness to pay more for green hotels and restaurants (Lita et al., 2014), while there is a positive relationship between eco-friendly hotels performance criteria and satisfaction (Nilashi et al., 2023). Although tourists may have a low interest in local food consumption in 4 & 5 star hotels compared to lower star hotel accommodations (Sengel et al., 2015), brand attributes such as physical relationships and reflection, together with high food quality, could improve a high star hotel's image (Ismail et al., 2016). In luxurious restaurants, interpersonal influence such as the "snob effect", the "bandwagon effect" and personal influence such as hedonic effects affect prestige consumption (Kiatkaawsin and Han, 2019), while perceived hedonic value, together with perceived

functional value and perceived symbolic/expressive value, may influence tourist consumers' attitudes to dine at luxury restaurants (Chen and Peng, 2018). The positive influence of prestige values (conspicuous, social, emotional, quality) on affective commitment will in turn affect the revisit intention to premium food markets (Lee et al., 2019a), while enjoyment of the experience and the status of upscale restaurants are significant factors motivating consumers to revisit these types of restaurants (Daries et al., 2024). The image of renowned restaurants positively influence the tourist intentions to recommend and revisit, while tourists' emotions seem to be the most significant factor when explaining the overall experience and tourist loyalty (Hernandez-Rojas et al., 2021).

Subjective norms in the first place and perceived customer patronage in second place were the most significant factors influencing intentions towards the inclusion of indigenous dishes on the menus of small and medium hotels in Ghana (Bondzi-Simpson and Ayeh, 2017), whereas in Malaysia, although tourists seem to have lots in commons in consumption intention, they differ in the way they intend to consume Dayak local food (Ting et al., 2019).

Hedonic values, such as entertainment and emotional worth, were found to be the most significant factors that influence consumer intention to visit food trucks (Shin et al., 2019), while waiting time was found to amplify the relationship between food authenticity and behavioral intention in food trucks (Wang, 2025). Integrated interpretations of performative approaches were used by Rabbiosi (2016) for the branding of local food and wine shops. Restaurant stimuli such as food quality, chef's image and service quality can influence both the positive and negative emotions of customers and in turn loyalty (Peng et al., 2017); perceived authenticity affects positive emotions (Kim et al., 2017), while an authentic menu together with the psychological needs "to belong and to be unique" increase the satisfaction and loyalty of customers in ethnic restaurants (Liu and Mattila, 2015). Single customers' satisfaction, trust and commitment to single friendly restaurants in Taipei City, Taiwan depend on restaurant attachment dimensions and experiential relationship intentions (Wu et al., 2019), whereas the positive relation between customer satisfaction with wine promotion, which significantly affects behavioral intention in Korean restaurants, depends on customers' gender and age (Kim et al., 2019d). Educated staff and social connection with the employees are the main restaurant attributes that repeat tourists appreciate, enhancing the loyalty of the place as well (DiPietro et al., 2019), while in the study of a historic winery in Spain, the

revisit intention for highly satisfied tourists takes a higher number of repeat visits in order to start decreasing, following the inverted U-shape relationship (Park et al., 2019).

Restaurant image and experiential value are very important factors that affect consumption intention in nostalgic hot pot restaurants in Taiwan, especially nostalgic emotions, which can attract tourists even before the experience takes place (Chen et al., 2014), while the experiential value of pop-up restaurants results in increased standards of relationship quality, satisfaction, trust, positive WOM recommendations, return visits and an increased intention of WTP towards pop-up dishes in the USA (Taylor Jr et al., 2018). Physical environment quality is considered the most important factor that influences most word of mouth towards purchase decisions in Malay upscale restaurants (Basri et al., 2016), while willingness to pay for wine tasting in cellar doors depends on the simultaneous offer of local products and the deduction of the corresponding cost if wine is purchased (McNamara and Cassidy, 2015). Satisfaction with Michelin food has the greatest effect on integrated satisfaction, whereas street food has a major role in generating WOM (Lai, 2020). The need to increase awareness and issue certificates on Halal restaurants and hotels could improve their image and tourists' intention to revisit, especially in small Asian cities (Samori et al., 2016). International chain branded spaces of hospitality, such as Mc-Donalds, located a little further away from the main touristic centers, could result in positive tourist experiences, by enjoying both the authentic cultural characteristics of the destination and the corresponding atmosphere of the globalized branded hospitality (Osman et al., 2014).

The value of co-creation and co-production of local food has been analysed by Thomas-Francois et al. (2017) using service dominant logic and mind map techniques to examine their influence on the supply chain of food service establishments. In particular, the role of coproduction is being emphasized in restaurants by coproducing social meanings among customers' interaction, service staff and chefs, enhancing at the same time social meanings of family togetherness and sharing experiences (Matson-Barkat and Demondtrond, 2018) as well as in the development of food factories, which together with image congruence, positively influence trust and unplanned purchases of food factory products (Chien et al., 2018).

Regarding festivals, the determinants of satisfaction and its relation with revisit intention are mostly examined in the papers. Positive relations were identified between perceived value and perceived quality in satisfaction, which in turn positively affects the intention to revisit Amis Harvest Festival and Hualien in Taiwan (Sung et al., 2016), while Vajirakachorn and Chongwatpol (2017), in their study of a local food festival in Thailand, used a business intelligence framework to analyze perceived value, perceived quality and satisfaction, together with 27 other attributes, to explain and forecast revisit intentions. Attribute performance together with culture and atmosphere played a significant role on tourists' satisfaction of Oktoberfest in Munich, the most famous beer festival worldwide (Harrington et al., 2017). Level of satisfaction and revisit intentions were also examined in the Rumah Terbuka Aidilfitri celebration in Perak, Malaysia with the majority of visitors stating that they will recommend it to others as well (Muhammad et al., 2016a). Slow food festival in Melbourne explored the way virtue ethics influence foodways (Williams et al., 2015). Engagement and positive emotions in Welsh food festivals were considered to be good predictors of post-behavioral intention months later (Organ et al., 2015). Urban festivals and environmental, social and ideological place-making dimensions were explored by Lau and Li (2019) in their attempt to define a unique notion of place. In a survey of wine events that took place in France and Spain, depending on the method used, SEM findings showed that intention to return is affected positively only by participation and involvement while the fsQCA findings showed that these factors cannot be seen independently and should be combined with core wine & education (Afonso et al., 2018). Lu and Chi (2018) implemented an approach that encourages the active involvement of tourists in local food and related activities by organizing educational and entertaining events on the premises.

In the Campania Region of Italy, it was found that attitude was the most significant element that affects intention to revisit local small culinary festivals with the food and beverage quality having the most influential factor on tourists' attitudes (Vesci and Botti, 2019), while in wineries in Australia and the USA, service staff, complementary products together with winescape setting and wine value, were considered to be significant attributes that influence wine tourists' attitudes towards the behavioral intentions of wineries (Quintal et al., 2015). The significance of customer service was proven to be the primary predictor of repeating

visits at wineries, contributing to economic development as well, since they support sustainable revenue for small and medium wineries in the area (Byrd et al., 2016).

Concerning food museum restaurants, social trust together with external factors that verify authentic representation of the museum contributes to the perceived authenticity of the food tourist's dining experience (Kim et al., 2020a), while the provision of assistance is found to be beneficial to visitors because it increases spatial control, hedonic value, and overall satisfaction (Ponsignon et al., 2023).

5.5.1.4 Gastronomic characteristics/image of a destination and intentions to revisit/recommend

Little is known about the attributes that characterize gastronomic image from the point of view of tourists (Chang and Mak, 2018). Kim (2014) developed a scale development procedure with attributes that influence memorable tourism experiences in a tourism destination. Omar et al. (2015) showed that the involvement in food culture and the perceived importance of local heritage food influence the loyalty of international tourists in the sense of revisiting Malaysia, while Chang and Mak (2018), after using a repertory grid method and generalized Procrustes analysis, claimed that flavor profile, familiarity, distinctiveness, convenience and price are the most significant GI attributes in Taiwan. Destination food image factors such as unique cultural experience, health and hygiene, restaurant service, food taste, variety and eating manners were found to have more influence on food preference than food consumption, varying by the nationality of the tourists as well as excluding food taste image (Promsivapallop and Kannaovakun, 2019).

Moreover, in Tainan, a historical city of Taiwan, selling traditional street food, consumer return on investment (CROI) was considered to be a key attribute in the evaluation of experiential value which could improve a place's image, which in turn influences the intention to revisit (Tsai and Wang, 2017). On the other hand, in Italy, street food could contribute significantly to the image of a region, but street vendors should be trained better in food preparation (Privitera and Nesci, 2015).

Food triggers travel motivation, influences the choice of the tourist destination and the gastronomic experience, and affects satisfaction, decision behavior and the intention to revisit

a destination (Berbel-Pineda et al., 2019; Bjork and Kauppinen-Raisanen, 2019). Ji et al. (2016) showed that food satisfaction that affects intentions to revisit and recommendations depends on food personality traits such as neophobic/neophilc tendencies, and on the mediating role of novelty seeking and food consumption. Overall experiences could also be predicted significantly from the food perceptions of tourists regarding the identity and the emotional image of the territory (Folgado-Fernandez et al., 2019). In Cuenca of Equador, greater preference and appreciation of high quality local cuisine is made from tourists who have a higher educational and income level and a higher intention to revisit (Perez-Galvez et al., 2017a).

According to Alderighi et al. (2016), local food image destination and consequently intention to revisit also depends on how well a local food product is characterized by its place of origin, because this will reduce the intention to revisit other similar destinations (business stealing effect). Moreover, destination image could influence product evaluation over time because of the halo effect, depending on the level of knowledge and high involvement of tourists in food activities (Lee et al., 2019b).

Higher numbers of agricultural enterprises, together with the age of the products' destination of origin and the large number of investments in marketing will increase the collective reputation of the product which will lead to the enhancement of the destination image of an area (Marchini et al., 2014). Concerning agrifood product's symbolic images, they can be directly transferred to a tourism place and subsequently generate stronger tourist desire to visit the place than any other product images (Liu et al., 2023).

Moreover, a strong food destination image could act as a significant factor in competitive advantage against other destinations with similar characteristics (Chang and Mak, 2018; Jalis et al., 2014). The relationship between the image of a wine area and destination brand equity, also taking into account the brand image, was also tested in five wine regions of Spain as a chance to attract tourists (Gomez et al., 2015a); by asking stakeholders and tourist groups, it was found that winery managers evaluate more positively the above characteristics than visitors (Gomez et al., 2015b).

5.5.2 Stakeholders' approach

Stakeholders such as farmers, producers, distributors, food service managers, policy makers and local residents should actively cooperate among each other by the creation of stakeholders' network, which could enhance marketing initiatives for the promotion of the touristic image and attraction of the local food product, food service place and destination.

5.5.2.1 Stakeholders' Network

Over the last two decades, there is an increase in research concerning wine tourism, but the majority of the articles are focused on the demand side (tourists) rather than the supply (local stakeholders) side (Soontiens et al., 2018). Research shows that there is lack of cooperation among local producers (Francioni et al., 2017), lack of effective representation in decision-making at the societal level (Soontiens et al., 2018), inability for internalization of local food firms (Francioni et al., 2017; Musso and Francioni, 2015), absence of effective involvement of local residents in wine trails (Xu et al., 2016), absence of various agents in olive oil routes (Millán-Vazquez de la Torre et al., 2017) and absence of tour operators (Garibaldi et al., 2017).

The creation of local network of key stakeholders is essential for the promotion of the food tourism and the tourism development of the regions, as well as for the enterprises that could act as a competitive advantage against other similar competitors (Musso and Francioni, 2015; Szpilko, 2017). Coordination and voice mechanisms could contribute to the effectiveness of knowledge sharing and mutual understanding which could lead to collaboration among the stakeholders (Soontiens et al., 2018). The need to create networks among all wine producers to promote the local identity and make the destination more competitive by offering authentic and unique experiences was highlighted by Noguer-Junca and Crespi-Vallbona (2025), while local networks could contribute significantly to the internalization of winemakers (Musso and Francioni, 2015), especially when there are small wine producers,; a personal network of relationships could then be developed with tourists in the first place and with friends and relatives, expatriates and other business partners as well (Francioni et al., 2017). Moreover, local networks could assist in the innovation of local food products (Szpilko, 2017) and solve

proximity difficulties in an urban target market, when local industry is located to rural areas (Soontiens et al., 2018).

The engagement of local people with tourists is a crucial factor in the promotion of food tourism, acting as part–time marketers, by creating suitable destination places where tourists could have memorable food experiences (Bjork and Kauppinen-Raisanen, 2019), while participatory experiences with the involvement of local residents also seems to influence tourists' perceptions in salt tourism destinations (Wu et al., 2015). The need for destination management organizations to understand residents' social sustainability needs of the food tourism events was highlighted by Agyeiwaah and Zhao (2024) to introduce attributes that augment residents' quality of life and positive responses to tourism development. Experience co-creation, the interaction between tourists and local residents, between tourists, frontline tourism employees and operant resources together with satisfaction affect the level of active participation and involvement in food-and-wine tourism experiences (Rachao et al., 2021), but the social interactions between tourists and local residents do not influence tourists' willingness to pay for food-and-wine experiences (Rachao et al., 2023). Moreover, Park and Widyanta (2022), highlighted the way in which negotiation and creation of food experiences co-created by tourists and suppliers contributes to evolving destination foodscape.

Moreover, an adequate management of social networks, will assist in the transmission and preservation of knowledge attributes and production methods from generation to generation (Kohsaka et al., 2016) by taking into account positive memories of socialization practices concerning sharing and togetherness that could improve healthiness and food security (Xiong and Brownlee, 2018). Furthermore, local residents' levels of perceptions and satisfaction could affect accordingly the promotion of wine tourism such as wine trails, in terms of personal benefits and society impact (Xu et al., 2016). The involvement of various agents in olive oil routes (Millán-Vazquez de la Torre et al., 2017) and the cooperation of tour operators with local stakeholders could satisfy to a high degree the needs of any type of tourists combining gastronomy with culture and other food activities (Garibaldi et al., 2017).

5.5.2.2 Food Tourism Marketing

Successful marketing of a destination was made in Houston, Texas, USA, which has acquired national recognition as a food destination in very famous media, having established an official website for visitors where they could upload their impressions (Nelson, 2016), and in Malaysia, by promoting annual events with 151 national traditional foods with promotional material emphasizing the unique characteristics of Malaysian cuisine with promotional words and texts such as "close-up meal", "creating desire", and "sensory appeal" (Jalis et al., 2014). On the other hand, non-successful marketing of Istanbul city as a culinary destination was indicated by Okumus and Cetin (2018), after conducting a content analysis, since food was not properly marketed as a major characteristic of the city, while in the survey conducted in Australia, a lack of consensus between promotional images of the Tourism Department of Australia and the food industry stakeholders had, as a consequence, the adopted marketing strategies to be ineffective as well (Lai et al., 2018). Concerning Halal food, Japan, Thailand and South Korea have also marketed their countries effectively as Halal tourist destinations for Muslim tourists by promoting Halal cuisines, food culture, restaurants and services; on the contrary, this was not quite successfully done in China, since religion was promoted as an ethnic topic in its culinary tourism policies (Yousaf and Xiucheng, 2018). Moreover, in South Korea, a psychometric analytical approach was established to understand Halal-friendly performance quality and the plan to maintain and control quality characteristics for the development of Halal tourism in a non Organization of Islamic Cooperation destination (Al-Ansi and Han, 2019), while in the Basque region, it is emphasized the strategic deployment of sensory gastronomic experiences for effective place-branding, by leveraging regional food for branding and growth, that enriches visitor experiences while reinforcing regional identity (Recuero-Virto and Arrospide, 2024). Storytelling that relates the local products with the regional heritage, the landscape, and traditions turns out to be frequently considered as a key to joint success for the Basilicata region as strategic planning for tourism development (Moliterni et al., 2025).

The latest social media technology improvements could be a very useful tool for the promotion of food tourism and the economic development of an area by discoursing privileged middle class cultural symbols via official promotion (Jong and Varley, 2017) and by the creation of an official governmental instagram account advertising the unique local

food characteristics (Yu and Sun, 2019). Picazo et al. (2025) investigated the presence of gastronomic offerings in promotional thousand photos to assess how the pictures represented the food offerings at resorts, while Fuste-Forne and Filimon (2025) based on a content and semiotic analysis, analyzed thousand Instagram food posts as a marketing strategy for local foods and their brands' symbolic meanings in tourism management and marketing.

That new trend of food-stagramming, could be very useful from tourists as well, since they could share dining experiences, attitudes and impressions from a destination that could affect the travel behavior of their followers (Wong et al., 2019). Multisensory virtual experiences were also used as a technological improvement for the promotion of wine tourism in Porto (Martins et al., 2017). Concerning the use of technology in the promotion of food tourism in food services, marketers could create promotions, coupons, and advertisements for online, apps, and social media sites to match these needs. Apps and social media were used from all the segments of high frequency wine consumers. Specifically, low spenders used wine apps mainly to download coupons in grocery stores; on the other hand, moderate and high spenders used social media mainly for information and communication with friends and relatives (Thach and Olsen, 2015). Orea-Giner et al. (2025) examined tourists' perceptions of a Green Customer-Love Service system in restaurants, based on artificial intelligence (AI) and human co-creation, stating that human–machine collaboration, particularly in AI-driven feedback management, could strengthen the connection between technology and sustainability.

5.6 Discussion

This research aimed to shed light on the food tourism approaches and management issues. In this research current trends of food tourism were pinpointed by categorizing and analyzing the main approaches that are crucial in food tourism research and by conceptualizing a framework with those approaches that affect food products, food service establishments and destination characteristics from both tourists' and stakeholders' perspective, which in turn affect directly or indirectly the decision making on behavioral intentions as to whether to purchase and/or recommend a food product, and to revisit and/or recommend a food service establishment and/or a food destination.

From the analysis of the conceptual framework, it is clear that the results of different papers concerning the same topic may differ. The main reasons, among others, refer to the different profile (demographic characteristics), personal values and interests of tourists such as the desire for knowledge, motives, active involvement, personal beliefs (attitudes, subjective norms, perceived behavioral control), perceptions, emotions, desires, experiences and satisfaction; the existence of a well-organized stakeholders' network and their initiatives concerning marketing activities to effectively promote the image and the brand of the specific and various characteristics of a food product, food service establishments and food destination (city, region, country), that are linked with different and unique characteristics of culture, history and authenticity. Moreover, some technical characteristics such as the sample size, the research methodology and the time period of research may play a significant role in the differentiation and interpretation of the results. Thus, all the above characteristics and factors should be very carefully taken into consideration, when tourists' behavioral intentions are investigated.

The main trends derived from the analysis, are consistent with the findings of the World Food Travel Association via "2020 Food Travel Monitor". Travelers' food neophilia differs between genders and generational cohorts (Okumus et al., 2021), they would like to take up alternative forms of food tourism (Arroyo et al., 2024; Luoh et al., 2020; Moshin et al., 2020), to taste street food (Jeaheng and Han, 2020), to visit new food establishments other than mainstream restaurants (Kim et al., 2020a; Lugosi et al., 2020), to take part in experience co-creation practices (Lugosi et al., 2020; Rachao et al., 2023), to strengthen family bonds by eating all the members together and promoting their experience by Word of mouth to their friends and relatives (Lai, 2020) or/and by uploading photos and comments on social media (Fuste-Forne and Filimon, 2025; Wong et al., 2019). Memorable experiential food experiences could enhance tourists' intentions to buy local food products, revisit food establishment and gastronomic destination that lead to regional economic and socio-cultural development (Shoukat et al., 2023; Wondirad et al., 2021).

Furthermore, it is proved from the outcomes of the research that future researches on food tourism should focus more on implementing more researches from the supply side in food service establishments which are not so common, in towns and countries that are not adequately analyzed in the literature so far, in sustainability issues incorporating all three

dimensions at the same time, namely economic, sociocultural and environmental aspects, whereas there is a need for a holistic approach that takes into account both tourists' and stakeholders' perspective, in order to better understand all the main factors and relations that affect or could affect positively or negatively, directly or indirectly, tourists' behavioral outcomes.

To the best of our knowledge, this is the first study that combines an analysis of food tourism approaches in broad categories such as motives, culture, history, authenticity, marketing and experiences and a conceptual food tourism management framework that takes into account the various characteristics from food product, food service and destination in a holistic perspective.

CHAPTER 6

TOURISM SURVEY A

6.1 Introduction

In the previous section a Conceptual Framework of Food Tourism Management was developed in order to understand the behavioral intentions of tourists, taking into account both the demand and supply perspective (Angelakis et al., 2022). Many studies have relied on food tourism characteristics to understand and measure the level of impact each or some of them have on various decisions such as destination and choice of food establishment or food-related behavior while on a vacation. The Theory of Planned Behavior (TPB), based on attitudes, subjective norms, and perceived behavior control, could be used for that purpose, but due to the multidimensional nature of the characteristics of food tourism from the demand and supply side at a destination, there is a need for an extended TPB, including more constructs in order to precisely identify and explain the behavioral intentions of tourists. In this research, the behavioral intentions of food tourists are explored by using an extended Theory of Planned Behavior Model, taking into account the mediating role of satisfaction between perceived value & quality and behavioral intentions.

6.2 Motivational factors

According to Dann (1977), there are two types of factors, namely push and pull, in any kind of travel decision. Push factors are internal motivations that urge tourists to decide to travel. Pull factors are external ones related to the destination's characteristics, which leads to making a decision about a holiday destination. Many studies are based on these motives when trying to understand and evaluate the level of influence they have on tourists' behavioral intentions while on vacation. Dimensions of motivation such as escape, change, excitement, taste of food/wine, socialization, interpersonal relationships, social status, family togetherness, relaxation, enjoyment, cultural experiences, novelty, knowledge, and learning can be characterized as push factors. Food tourism appeals, such as food events, food fairs, food trails and tours, markets, restaurants and cooking schools, food producers and staff, core wine products, wineries, food variety, and destination appeals (unique specialty shops,

markets selling local farm produce, cultural events, the rural environment and farmers' markets, etc.) can be characterized as pull factors (Su et al., 2020).

Escape, self–exploration, relaxation, prestige, regression, enhancement of kinship relationships, and facilitation of social interaction were considered as push motives for travellers, whereas education and novelty referred to pull motives (Crompton, 1979). In the study of Kassean and Gassita (2013), rest and relaxation were the most significant push factors, followed by nostalgia, escape, novelty, social interaction, while climate and weather, landscape and scenery, flora and fauna, beaches, the exotic atmosphere, the local hospitality and authentic culture were considered as the main pull factors in the island of Mauritius. Concerning food and beverage tourism, motivational factors were distinguished into four main categories for tourists who visited a North Carolina brewery (Kraftchick et al., 2014). The craft brewery experience and beer consumption were considered as pull factors, whereas enjoyment and socialization were regarded as internal push factors. Mak et al. (2012) classified motivational factors into five main dimensions, namely symbolic, obligatory, contrast, extension, and pleasure, as factors influencing tourist food consumption.

Many researches and studies are based on these motives to understand and evaluate the level of influence they have on tourists' behavioral intentions while on vacation. An exciting experience, food tourism appeal, interpersonal relationships, and sensory appeal significantly influence the domestic tourists' intention to visit Bali, whereas the cultural experience, health concerns, and social values did not have significant effects on revisit intentions (Thio et al., 2022). In the study of Afonso et al. (2018), it was found that high core wine attributes and education, high product involvement and high participation in wine events, combined with escape and socialization or with the destination's attractiveness, lead to positive tourists' behavioral intentions in Iberia Peninsula, while vineyard aesthetics, core wine attributes of the product and educational experience are considered as the key drivers of wine tourism rather than the social context of the visit or the general regional characteristics in Northern Greece (Alebaki et al., 2015).

Based on the Experience Economy Model, the experiences connected with education and entertainment dimensions, and not the aesthetic and escapist, are the key factors for tourists who visit Cognac in France for wine tourism (Thanh and Kirova, 2018). On the other hand,

education and entertainment might not increase the tourists' perceptions to Street Food Festivals, while motivations related to escapism, memory and aesthetics result in positive predictors (Di Matteo, 2021). According to the six-dimensional structure of experience quality, entertainment and learning factors were considered as the least important components (Fernandes and Cruz, 2016). The results of the application of the Experience Economy Model were reported in the research of Kim et al. (2019a) at grocerants in Korea, identifying the positive influence of entertainment and escapist experiences on brand prestige which significantly evokes functional, hedonic, financial and social values, with only the first three values affecting loyalty. In contrast, perceived functional value, perceived symbolic/expressive value and perceived hedonic value might affect consumers' attitudes toward luxury restaurants in Taiwan, which in turn, may influence their purchase intentions (Chen and Peng, 2018). Hedonic values influence consumers' intention to visit food trucks not only directly but also indirectly, through the creation of positive attitudes, while utilitarian values impact consumers' intention only indirectly by evoking a positive attitude toward food trucks (Shin et al., 2019). Moreover, memorable local food experiences (cultural, educational, novelty, hedonism–meaningfulness, and adverse experience) can affect tourists' intentions to recommend and the intention to revisit a food establishment (Adongo et al., 2015; Fernandes and Cruz, 2016), while nostalgia has both direct and indirect effects on consumption intention in the study of Chen et al. (2014).

Relating the 4Ps Model (product, price, promotion, and place) with the 4Es formula (expertise, evaluation, education, and experience), Festa at al. (2016) aroused the concept of the wine marketing mix based on the relevant contribution of knowledge as a key component. The concept of knowledge was pinpointed in the study of Campbell et al. (2014) among students in a southeastern USA university food service, concluding that sufficient information and increased emotional interest concerning local products will increase willingness-to-pay for those products. Local food products are poorly recognized in South Savo in Finland, and tourists mainly from Russia are not aware and/or familiar with local food, so there is a decrease in the purchase intentions (Mynttinen et al., 2015). Moreover, the results of the research of Madaleno et al. (2017) show that knowledge about local food products acquired before and during travel to Portugal positively influence the purchasing behavior of tourists. The Motivation, Opportunity, Ability Theory was applied to investigate that event motivation

and prior knowledge of festivals have a significant positive impact on the culinary destination image, which in turn lead to destination loyalty and repatronage for food (Yang et al., 2020). However, while visitors had positive initial product evaluations and purchase intentions, these favorable evaluations decayed over time once the tourists returned back home, but the impact was lower for high-involvement visitors, who had more knowledge about the product (Lee et al., 2019b). This was the case in Malaysia, where tourists' food culture involvement acts as a main component on tourists' loyalty intention to repurchase Malaysian Heritage Food and revisit the destination (Omar et al., 2015), while in the study of Organ et al. (2015) it was found that the impact of negative emotions reduces over time, and positive emotions together with engagement at a food festival are good predictors of food purchasing behavior six months later.

In the study of Seo et al. (2013), the results showed that foreign tourists who are more experienced with local foods tend to have a more positive affective and cognitive image of local food and higher consumption intentions, although experiential familiarity was more influential than informational familiarity in the concept of improving local food image. Concerning ethnic food in Malaysia, only when Dayak food is appreciated and accepted by the locals could the food be further promoted to tourists (Ting et al., 2017), whereas strong appreciation for local food specialties has a positive influence only on the intention to (re)visit the place of origin in mountainous areas in Italy (Alderighi et al., 2016). Moreover, increasing the public's knowledge/awareness about the festivals in the USA is regarded as a priority in order to have favorable behavioral intentions (Li et al., 2018), while the interactive components of theme, product and design were considered by tourists as key sources of learning and entertainment that enhance the attractiveness of a salt destination and influence tourists' decisions (Wu et al., 2015).

Although there are numerous studies focused on the above dimensions of push and pull factors as independent variables, the number of studies that investigate the possibility of perceived value and/or perceived quality as broader categories that directly or indirectly influence tourists' behavioral intentions is actually quite limited (Abbasi et al., 2021; Ferdinand and Williams, 2013; Kim et al., 2011; Sung et al., 2016; Wahab et al., 2022; Zabkar et al., 2010).

6.3 Food satisfaction

Gastronomic motivation affects the choice of the destination and the gastronomic experience influences satisfaction, while tourists express a high level of satisfaction with the gastronomic attributes of the destination, leading even to loyalty (Berbel-Pineda et al., 2019). Experience quality has a significant effect on customers' loyalty, advocacy and satisfaction; thus, pleasant experiences should be created in order to evoke higher satisfaction levels and to positively affect tourists' behavioural intentions (Fernandes and Cruz, 2016). Connecting satisfaction with the gastronomy of the destination may affect revisiting and/or recommending the place, given its culinary distinction (Rodríguez-Gutiérrez et al., 2020). This was the case with a festival in Malaysia, where the majority of tourists were satisfied and would not only revisit the festival again in the future but will recommend it to others as well (Muhammad et al., 2016a). Moreover, perceived value and perceived quality of destination only indirectly affect the behavioral intention of tourists to recommend festivals in Taiwan through the positive influence on satisfaction (Sung et al., 2016). In contrast, that outcome was not consistent with previous researches (Kim et al., 2011; Zabkar et al., 2010). Moreover, at halal-friendly destinations, the constructs of perceived value, destination satisfaction, trust and loyalty significantly contribute to the prediction of tourists' future desire toward a destination (Al-Ansi and Han, 2019).

The elements of customers' emotional experience have to be comprehensively managed in order to achieve higher satisfaction that will enhance favorable behavioral intentions in halal food establishments (Tama and Voon, 2014). The increase in friendly restaurant attachment dimensions (experiential value) will increase experiential relationship quality dimensions (satisfaction and trust of customers), and this in turn will increase experiential relationship intentions (Wu et al., 2019). The same results hold in the survey of Taylor Jr et al. (2018) at pop-up restaurants, where those components led to an increase in behavioral outcomes, specifically the intention to spread positive Word of Mouth (WOM), return intentions and an increased Willingness To Pay. Tsai and Wang (2017) concluded that only one type of experiential value, namely consumer return on investment (CROI), can positively and significantly affect a place's food image, while there were positive effects of prestige values (with the exclusion of uniqueness) on affective commitment, which in turn positively

influences the customer's behavioral intention and revisit intention at premium food markets (Lee et al., 2019a).

In ethnic restaurants, authenticity has been considered a critical factor for enhancing customer satisfaction and purchase intentions, whereas the mediating role of customers' perceptions of authenticity is emphasized, in which unfamiliar ingredients, unique food names, and stories about food origins enhance consumers' perceptions of authenticity (Youn and Kim, 2017). Concerning perceived authenticity, unfamiliar food names and ingredients significantly boost customers' perceptions of authenticity and evoke positive emotions, in comparison with familiar food names and ingredients that arouse negative emotions (Kim et al., 2017), whereas consumers' perceived authenticity affects their purchase intention not only directly but also indirectly through restaurant image and positive emotions (Kim et al., 2020a).

Regarding wine tourism, two different attributes such as winery tour/wine tasting and overall ambiance impacted visitors' satisfaction, whereas revisit intentions of winery tourists start to significantly decrease after a certain number of repeat visits, but it takes a higher number of repeat visits for highly satisfied tourists' revisit intentions to start diminishing (Park et al., 2019). There is also a positive relationship between wine promotion and customer satisfaction, while customer satisfaction significantly influences behavioral satisfaction intention in South Korea (Kim et al., 2019d). Moreover, the effects of satisfaction with four types of local food (Portuguese, buffet, Michelin, and street-snack) and integrated satisfaction with food experience on WOM regarding Portuguese foods in Macau were investigated with different effects for satisfaction in each type (Lai, 2020). Cohen and Avieli (2004) suggested that visitors who prefer and take gastronomic experiences in Portugal seem to have neophilic tendencies (i.e., a preference for novel food flavours), given the fact that those groups of tourists (the so-called experiencers and authenticity seekers) have the tendency to seek out new food experiences (Madaleno et al., 2017) whereas food neophobia moderates Chinese tourists' decisions in consuming local food in USA (Wu et. al., 2016).

6.4 Theory of Planned Behavior

The Theory of Planned Behavior (TPB) is widely used in the food tourism sector. Three main characteristics are always evaluated in TPB, namely attitudes, subjective norms and perceived behavior control, in order to examine their influence towards behavioral intentions to consume/purchase/WTP local food products, to revisit the destination/food service establishment, and to recommend/WOM local food products, food establishments and destinations.

The study of Wu et al. (2016) applies TPB to conclude that food's sensory appeal and the communication gap are not significant in the prediction of Chinese tourists' attitudes, whereas food concerns and table manners could deteriorate their attitudes in the consumption of unfamiliar local food in the USA. TPB is also used in the wine sector (Quintal et al., 2015), suggesting that winescape service staff and complementary products in the first place, followed by winescape setting and wine value had a significant influence on wine tourists' attitudes toward the winery, and in turn revisit intensions and willingness to recommend.

TPB can be applied in the field of street food as well. Chavarria and Phakdee-auksorn (2017) showed that affection, perceived service quality and satisfaction, rather than perception of hygiene, food quality and value for money have the highest influence on consumers' attitudes towards street food, which in turn affect their future behavioral intention in Phuket. Regarding ethnic food, using the Theory of Planned Behavior, Ting et al. (2019) concluded that while tourists from different countries of Asia appear to have almost the same behavioral intentions, when they visit Sarawak in Malaysia, they have different consumption intentions toward Dayak food.

TPB is also used in festivals. Attitude was the most significant component that influenced the revisit intentions of local and small culinary festivals in Italy with food and beverage quality in first place, and staff service and information having the greatest impact factor on tourists' attitudes; concerning the other two elements of TPB, subjective norms also affect behavioral intentions comparing to perceived behavior control which seems to have no statistical influence on revisit intentions (Vesci and Botti, 2019). These findings are in line with those of previous tourism studies (Han et al., 2010; Lam & Hsu, 2006; Quintal et al., 2015).

An extended TPB model, including further major components in tourism marketing, was developed by Soliman (2021); besides the core TPB constructs, added variables such as travel motivation, eWOM, destination image and destination familiarity indeed exert a significant impact on tourists' intentions to revisit Egypt, while a mediating role of attitude, subjective norms and perceived behavioral control also exists. In their extended model of TPB incorporating satisfaction, destination image, perceived risk, service quality and perceived value, Abbasi et al. (2021) showed that perceived behavioral control, perceived value, destination image and satisfaction significantly influence visitors' revisit intentions, while perceived value, perceived service quality and destination image had a strong impact on satisfaction, which in turn was found to be an important mediator between perceived service quality, destination image and perceived value.

In the extended model of Zhang et al. (2018), besides the fact that the three main constructs have a positive influence on domestic tourists' consumption intentions toward local food in China, it was also found that attitudes play a partial mediating role between benefit perceptions and intentions, with the benefit perceptions having a significant positive effect on attitudes and behavioral intentions, whereas risk perceptions affect behavioral intentions in a negative way.

By using perceived benefits to business, perceived difficulties in production and service of indigenous dishes, as well as customer patronage, instead of perceived behavior control in the TPB extended model, Bondzi-Simpson and Ayeh (2017) found that attitude and perceived difficulties in production and service of indigenous dishes were not significant predictors in affecting intentions to add more indigenous dishes, whereas subjective norms in first place, followed by perceived customer patronage, were the most significant factors influencing behavioral intentions towards the inclusion of a greater variety of indigenous dishes on the menu of small- and medium-sized hotels in Ghana.

Meng and Choi (2016) developed an extended model of goal-directed behavior by including perceptions of authenticity, knowledge and information search behavior in the original model of goal-directed behavior (MGB), which consisted of positive and negative anticipated emotions and frequency of past behavior, besides the elements of TPB that significantly

influence desires, which in turn significantly influence tourists' behavioral intentions to visit a slow-tourism destination in Korea.

6.5 Data and Methodology

The research took place at the International Airport of Chania in Crete, Greece, through a well-structured questionnaire and face-to-face interviews during the touristic period from May to September 2021. The questionnaire was developed based on a review of the literature review on food tourism in order to better explore the drivers that affect behavioral intentions (Choe and Kim, 2018; Madaleno et al., 2017; Meng et al., 2016; Sung et al., 2016; Vesci and Botti, 2019; Zhang et al., 2018).

The questionnaire was translated into four languages: English, German, Italian and Polish, and distributed to tourists through roll-ups, posters and brochures who were waiting at the exit gates of the airport, having completed their vacations. Due to COVID-19 restrictions, the survey was conducted through an automated system of voluntary participation of foreign tourists using their personal electronic devices, in which the questionnaire was activated in the language of choice of the interested party through visual scanning of a suitable URL or QR Code from a PC, Smartphone or Tablet. More than 5,000 questionnaires were initially collected and a thorough screening and quality check of the data was made; some incomplete questionnaires were rejected, concluding with a sample size of 4.268 total questionnaires that finally considered as valid for analysis. In the year 2021, 662,000 tourist arrivals were recorded at the airport of Chania, so the sample size was quite large in order to extract statistical significant and trustworthy outcomes. Moreover the sample size was representative, since nationalities were represented with percentages that were in line with the actual number of arrivals per nationality.

In the literature, there is a dispute among researchers on sample size when the Structural Equation Model (SEM) is used (Bagozzi and Yi, 2012). Several academics suggest that outcomes derived from an analysis of no more than 200 questionnaires are not valid unless the community from which the sample was taken is also small (Barrett, 2007). Iacobucci (2010) argues that a sample size of at least 50 observations is sufficient and that the rule of thumb that it should be more than 200 is too simplistic. Other researchers believe that 10 to

20 respondents per parameter estimate is sufficient (Kline, 2015). The general rule is that the sample size depends always on the number of the real population size, the confidence level and the margin of error to be set. In this research, the outcomes of the sample are considered trustworthy at a 99% confidence level with a 2% margin of error, or at a 95% confidence level with a 1.5% margin of error.

6.6 Results

6.6.1 Sociodemographic data analysis

The sample was representative of the real arrivals per nationality that preferred the airport of Chania in order to visit Crete. Thus, the majority of tourists were from Central & North Europe (mainly Germany, France, Belgium, The Netherlands and Austria) with 31%; Scandinavian countries (Sweden, Norway, Denmark, Finland) follow with 22%, Eastern Europe (mainly Poland) with 18%, the Mediterranean (mainly Italy, Cyprus) with 13%, UK/Ireland with 11%, USA/Canada and Australia with 3% and other countries with 3%.

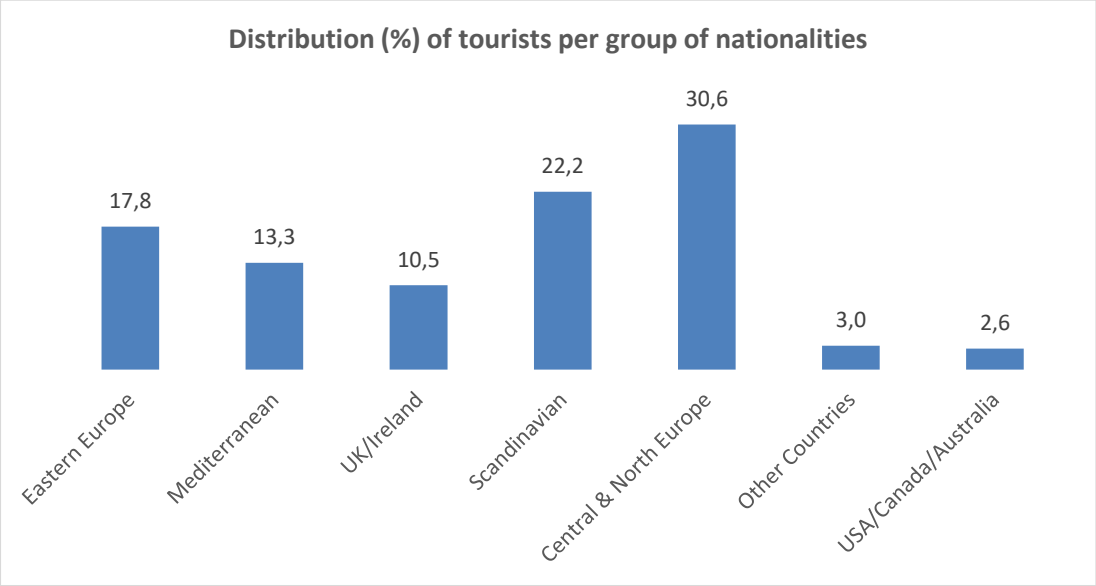


Figure 6.1 Distribution of tourists per group of nationalities
Source: Author's own work

The sample was equally distributed between men and women. Three out of four tourists were below 44 years old. More specifically, 36% were between 25-34 years old, 23% were very young between 16-24 years old and 17% were between 35-44 years old. One out of four tourists was above 45 years old. More specifically, 15% were between 45-54 years old, 8%

were between 55-64 years old and 2% were 65 years old and over. There were a large number of young people, which can be attributed to COVID-19. Older people preferred to travel less compared to young people due to the fear of being affected by the coronavirus.

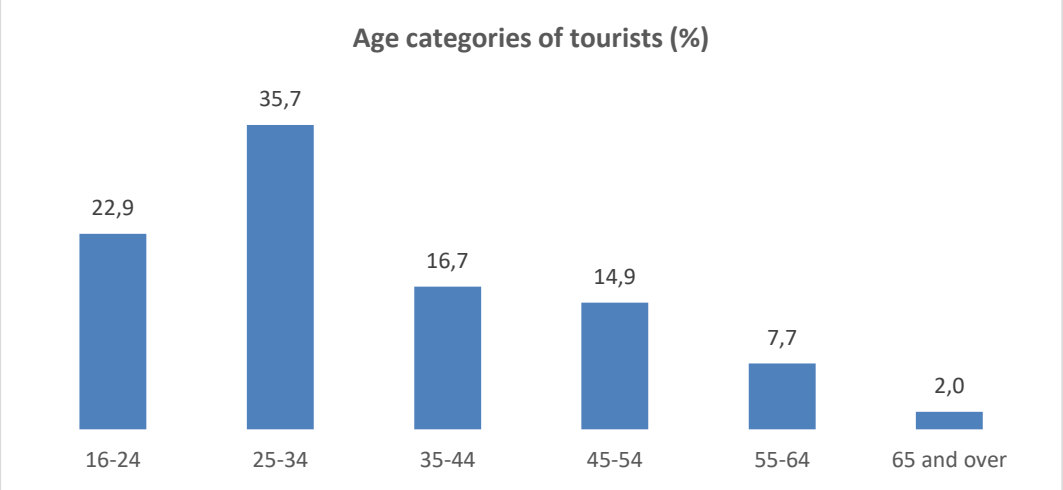


Figure 6.2 Age categories of tourists
Source: Author's own work

Almost half the sample of tourists (47%) was working in the private and 16% in the public sector; 13% were self-employed, 21% were students and 3% were retired. The percentage of students was very high due to COVID-19; young people were less likely to be seriously affected by coronavirus than older people, so they traveled more compared to older people.

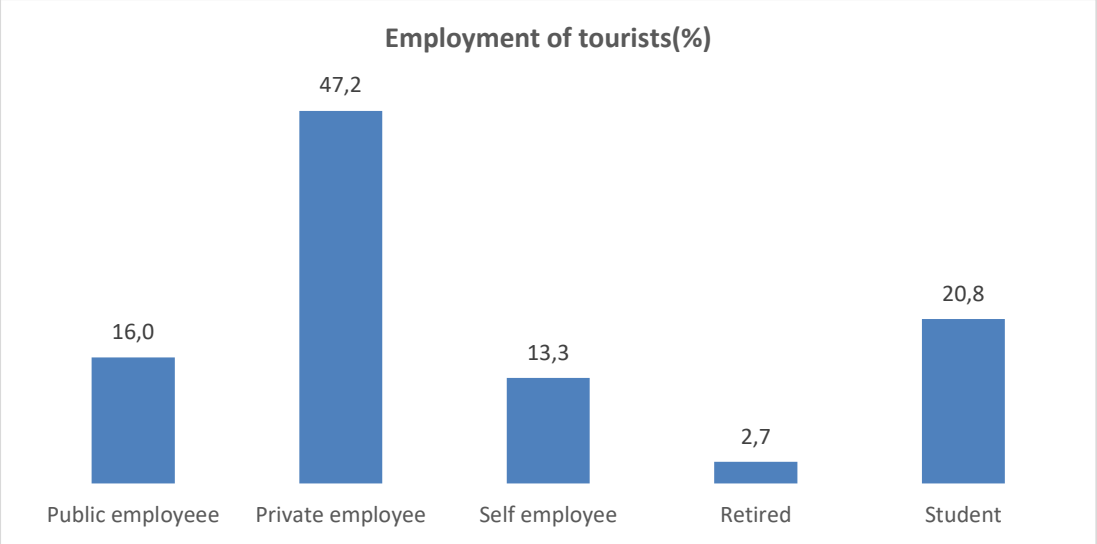


Figure 6.3 Employment of tourists
Source: Author's own work

The average net annual family income of the sample was around 60.000 euros. This amount is considered not to be so high due to the fact that there were lots of tourists who were students and were not working. Moreover, Scandinavian tourists, who are generally of a high income level, significantly reduced their travel to Crete. One of the main reasons was that some Scandinavian countries promoted and subsidized local residents to take vacations without traveling away from their country within the COVID-19 period.

Nevertheless, one out of five tourists had declared a quite high net annual family income of more than 100.000 euros.

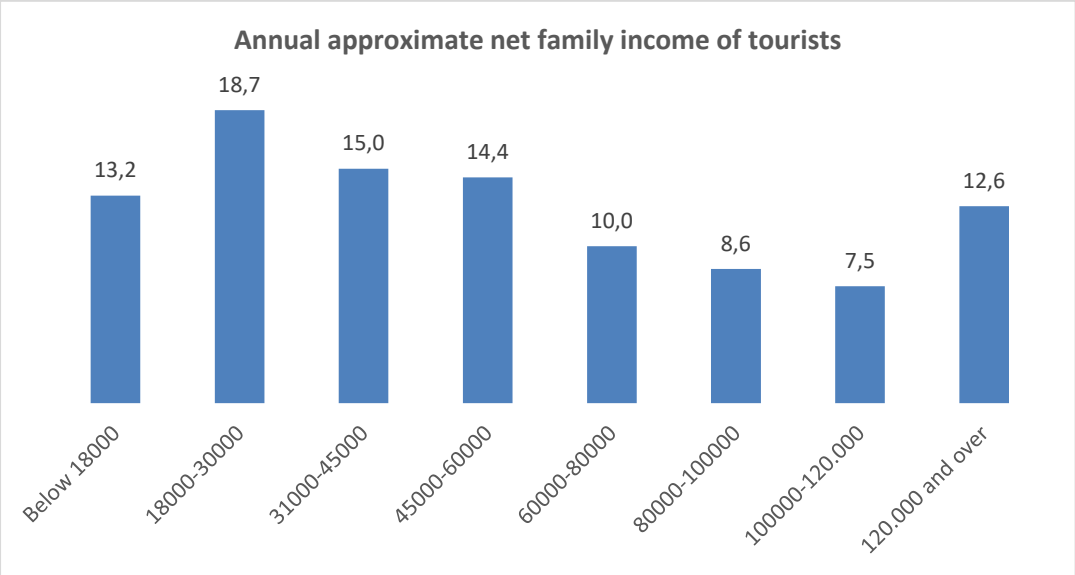


Figure 6.4 Annual approximate net family income of tourists
Source: Author's own work

The majority of tourists, almost four out of five visitors (82%), stayed for vacations in the Regional Unit of Chania, 15% preferred the Regional Unit of Rethymnon, 3% stayed in the Regional Unit of Heraklion and less than 1% preferred to stay for vacations in the Regional Unit of Lasithi. The fact that the vast majority of tourists stayed in the Regional Unit of Chania for vacations and generally in Western Crete was that the survey took place at the airport of Chania and not at the airport of Heraklion. The foreign arrivals at the airport of Heraklion were 3,2 times more than those arriving at the airport of Chania and the vast majority of tourists who preferred Heraklion airport ended up staying at the Regional Unit of Heraklion and generally in Eastern Crete for their holidays.

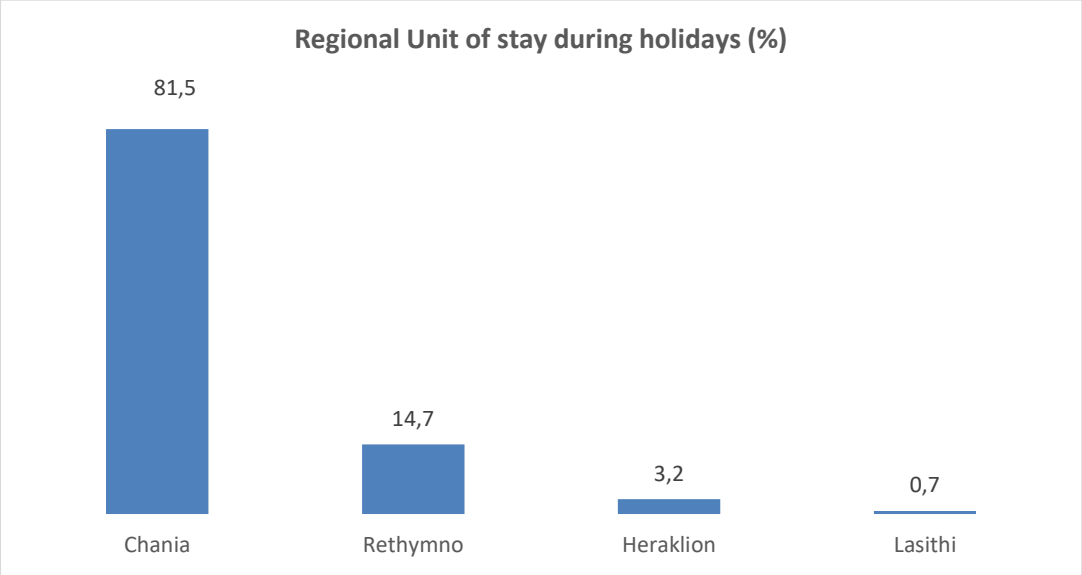


Figure 6.5 Regional Unit of stay during holidays
Source: Author's own work

Almost one out of three visitors (36%) had already visited Crete before, a percentage which is not considered so high. This is mainly due to the fact that there was a significant reduction in Scandinavian arrivals. Most of the Scandinavians who were coming to Crete and especially to Western Crete were repeaters. Another reason is that there were lots of students and generally young people, who were coming for the first time.

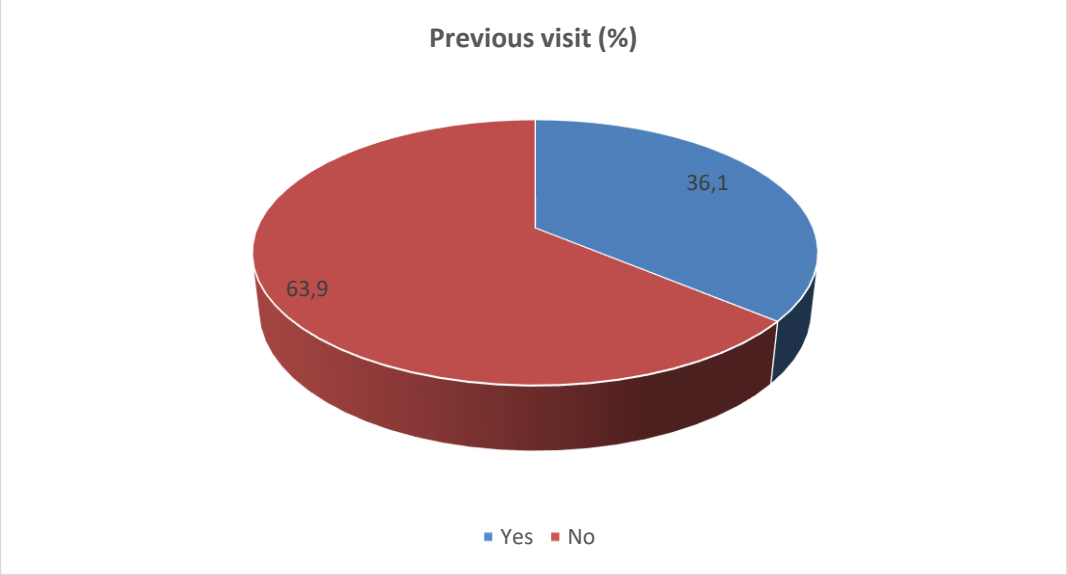


Figure 6.6 Previous visit
Source: Author's own work

For those who had already visited Crete before, almost half of them had visited Crete up to 2 times before and 78% of them had already visited Crete 5 times before.

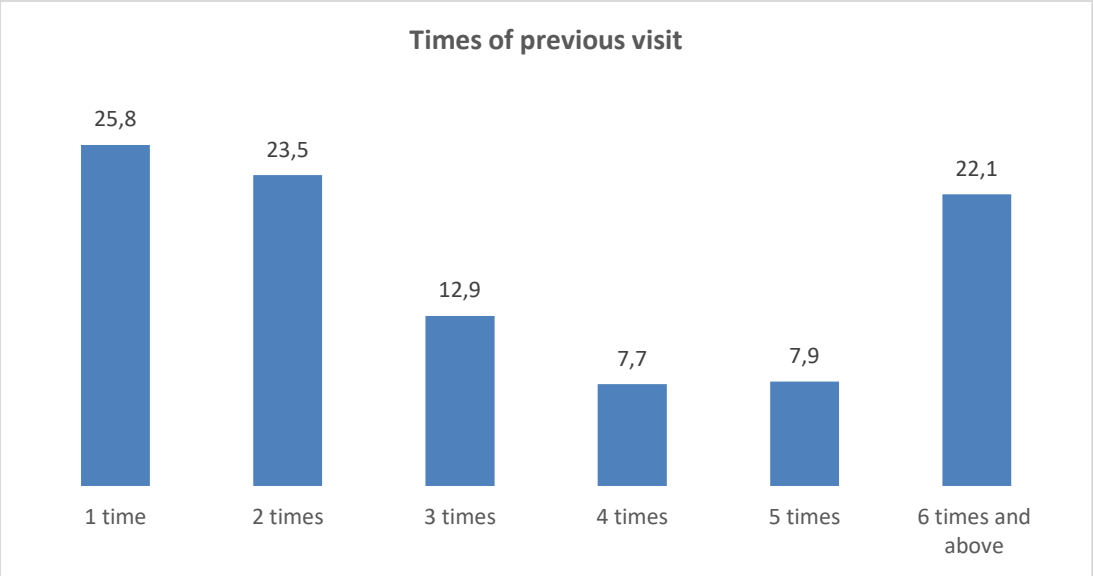


Figure 6.7 Times of previous visit
Source: Author's own work

27% of the tourists came for holidays in Crete together with his/her boyfriend/girlfriend, 25% came as a family with children and 23% without children, while 18% also came for holidays with a group/company/friends and 6% were alone (solo traveler). The percentage of the tourists who came alone or with company/friends was much higher during that period.

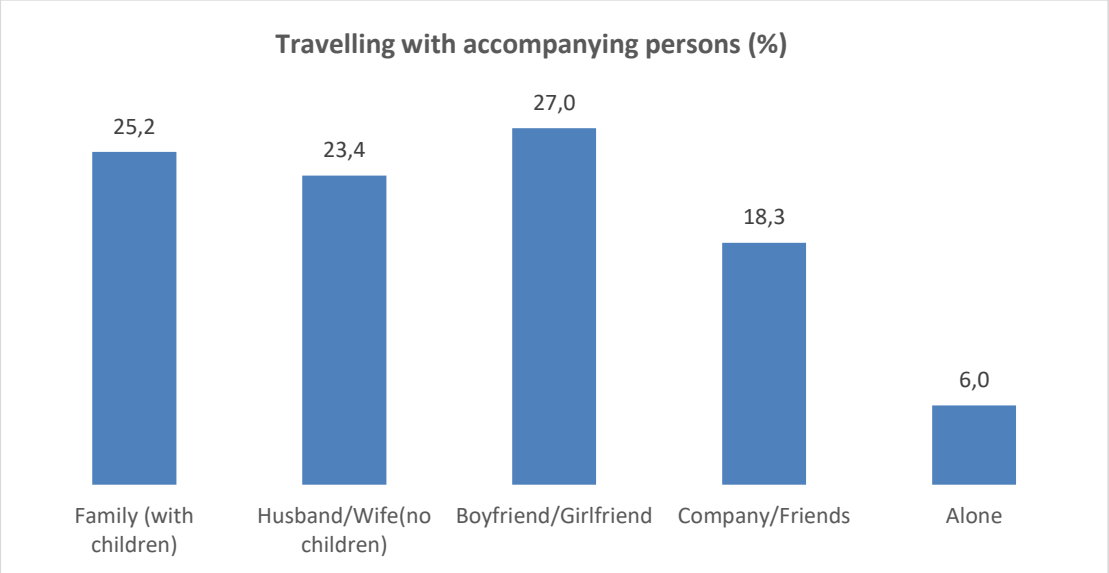


Figure 6.8 Travelling with accompanying persons
Source: Author's own work

Two out of three tourists arranged their holidays alone, making all the necessary arrangements, 24% preferred a travel agency and 9% had booked a package tour. The percentage of tourists who made all the travel arrangements alone was very high because the majority of tourists preferred not to use a travel agency/tour operator in order to avoid of being together with lots of people during the COVID-19 period (health reasons).

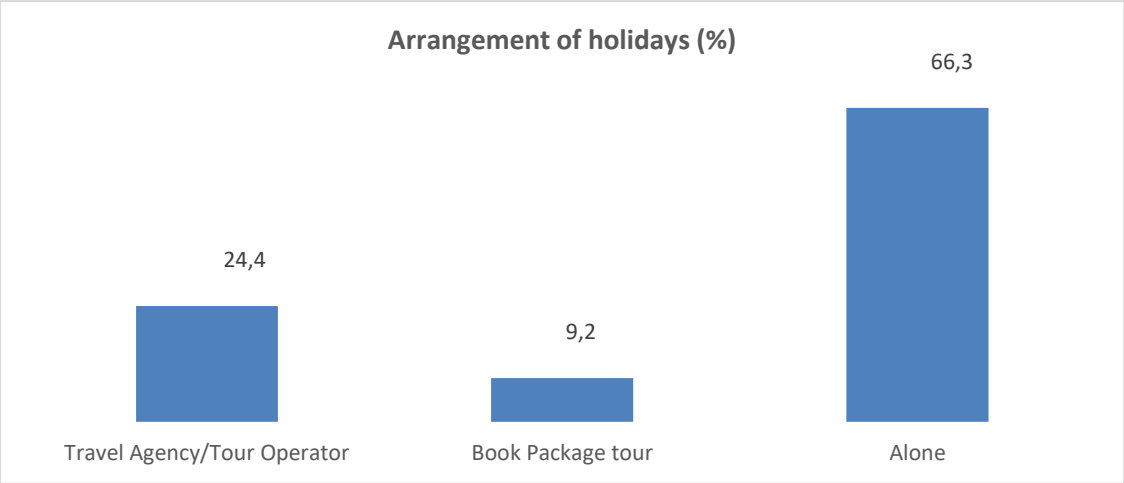


Figure 6.9 Arrangement of holidays
Source: Author's own work

The vast majority of foreign tourists came to Crete though direct flights from their hometown. More specifically, 54% came to Crete through direct non low cost flights (regular charters) and 41% came to Crete through direct low cost flights mainly by Ryanair. There was also 5% that came without a direct flight, using a domestic flight mainly through Athens/Thessaloniki.

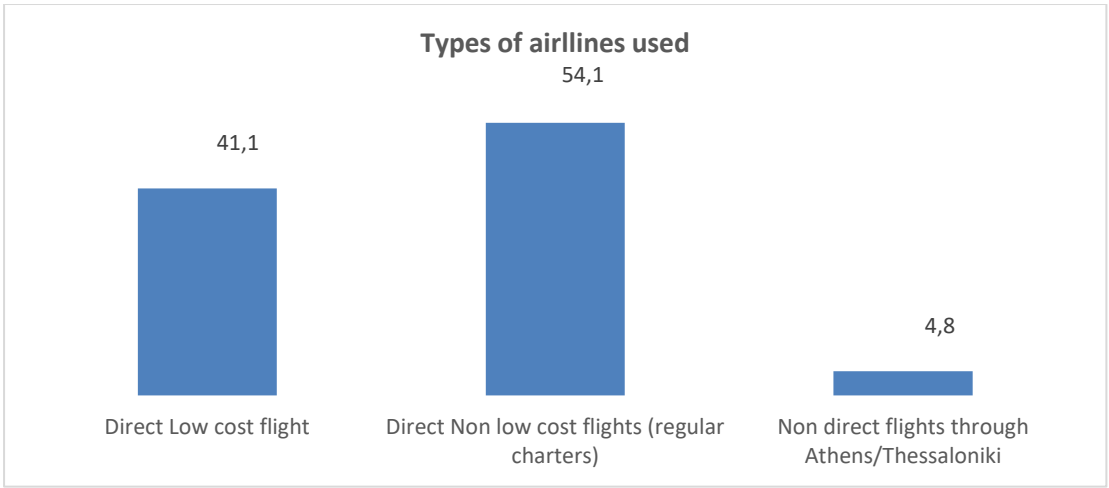


Figure 6.10 Types of airlines used
Source: Author's own work

The majority of tourists, almost six out of ten (57%), stayed at hotel accommodations. 28% rented an apartment or room, 9% preferred to stay in villas, 2,8% stayed at a friend's or family's house, 2,5% stayed at their own house and below 1% of the travelers preferred to stay in camping sites. The percentage of villas was very high, because tourists with high annual income preferred to stay with their accompanying persons in a separate touristic accommodation for health reasons and to avoid overcrowding at the same accommodation during the coronavirus period.

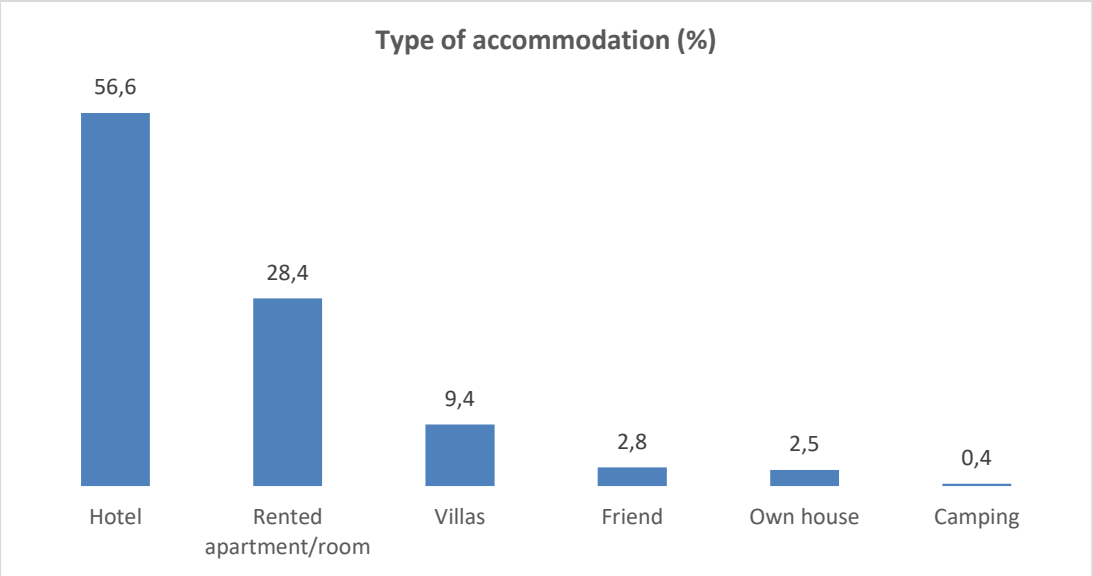


Figure 6.11 Type of accommodation
Source: Author's own work

Concerning those who stayed at a hotel, seven out of ten tourists preferred to stay at luxurious 4- and 5-star hotels. More specifically, 41% of tourists stayed at 4-star and 29% at 5-star hotels. Moreover, 23% of tourists stayed at 3-star hotels, 6% at 2-star hotels and less than 1% at 1-star hotel. Luxurious hotels were preferred by the majority of tourists because in that period the prices were very low, due to the low demand and the low number of tourist arrivals. Moreover, tourists had the feeling that they would be safer by the application of stricter health and safety protocols.



Figure 6.12 Hotel's star rating
Source: Author's own work

Concerning the foreign tourists' days of stay, almost six out of ten tourists preferred to stay for one week in Crete for holidays. Almost one out of four tourists stayed less than a week and one out of five tourists preferred to stay in Crete 2 weeks and more. One week of holidays was preferred by the majority of the tourists since weekly flights are more often provided by the majority of the air companies.

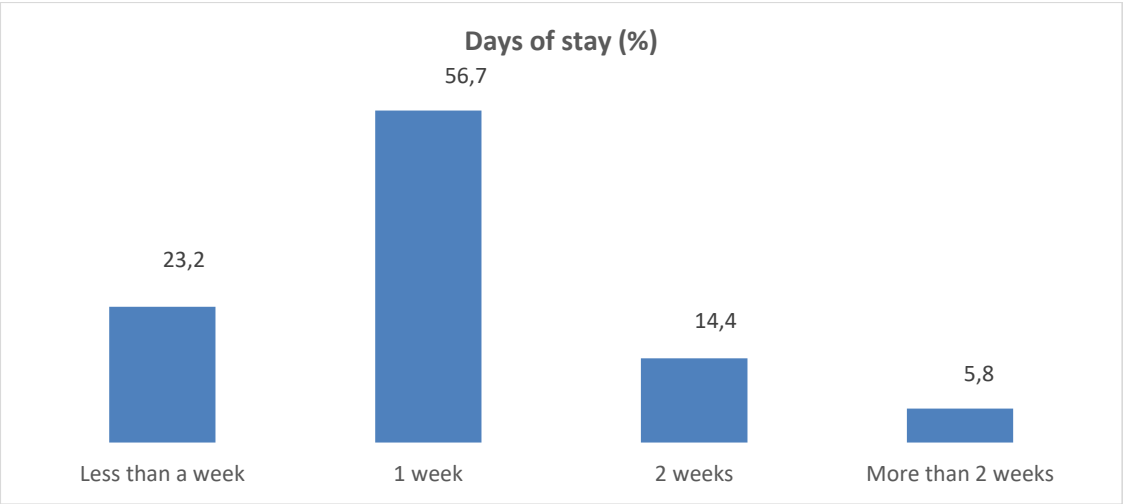


Figure 6.13 Days of stay
Source: Author's own work

Concerning the average budget of foreign tourists during their vacations in Crete, nearly 50% of tourists spent less than 600 euros per group of visit, excluding tickets and accommodation expenses. Three out of ten tourists spent more than 1.000 euros per group of visit during their vacations. The average budget was calculated in around 800-850 euros, which was not so

high, due to the fact that there were lots of students and generally young people with a constrained budget. Moreover, prices were lower in that period so tourists could satisfy their needs with a lower amount of money.

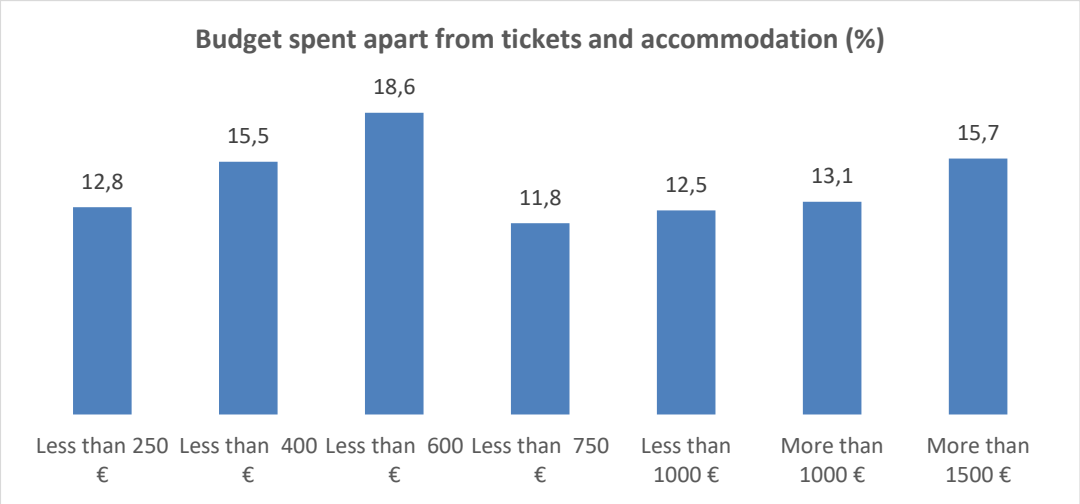


Figure 6.14 Budget spent apart from tickets and accommodation
Source: Author's own work

6.6.2 Agricultural products analysis

63% of tourists stated that gastronomic experiences were important or very important when they choose Crete as a final destination for their trip; on the contrary 16% declared the totally opposite opinion. Those numbers highlight how crucial the food experiences are in Crete.

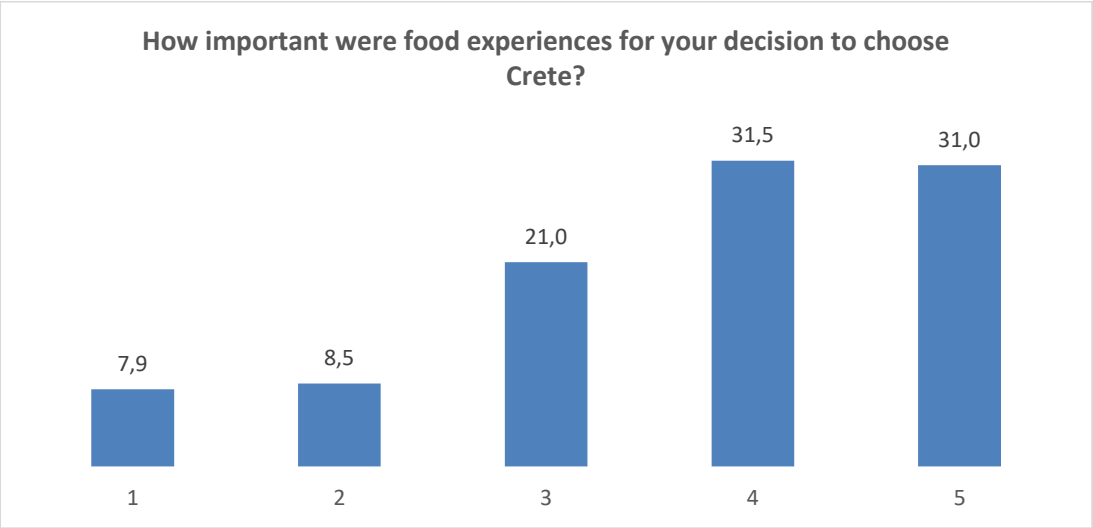


Figure 6.15 Importance of food experiences for tourists' decision to choose Crete
Source: Author's own work

Concerning the local agricultural products, 45% of tourists bought olive oil during their holidays in Crete, 38% bought wine, and 35% purchased local cheese (graviera, feta, mizithra etc). The purchase of fresh orange juice and tsikoudia followed with 34%. Three out of ten tourists bought honey herbs, and spices. Almost one out of four visitors bought vegetables and 17% preferred traditional rusk bread.

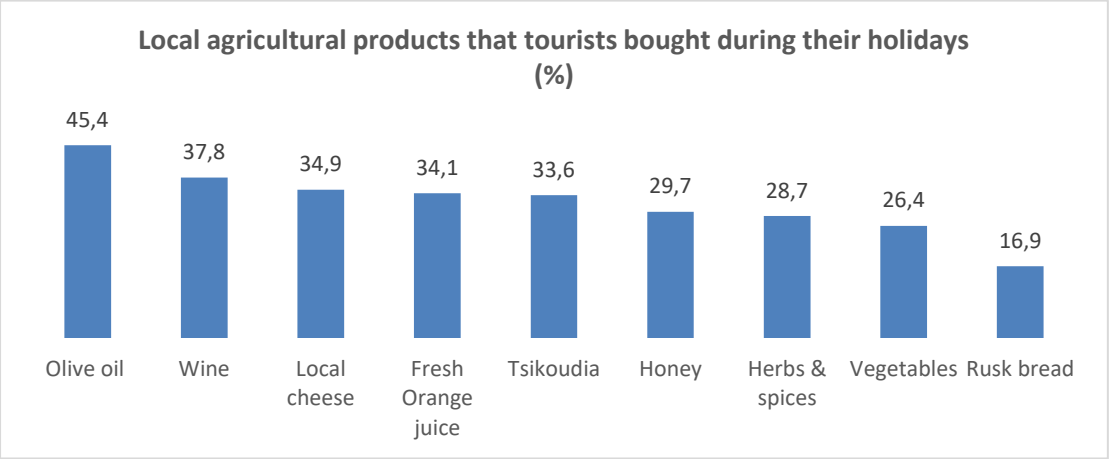


Figure 6.16 Local agricultural products that tourists bought during their holidays
Source: Author's own work

Regarding the participation of tourists in food activities, 4% of visitors participated in wine routes and 3% in olive oil routes. The same percentage of tourists participated in food festivals/events, 2% in agrotourism and 1% in cooking/seminar courses. Due to the fact that there were lots of young tourists, there was a lower participation rate in food activities; instead, they visited some other places such as the famous beaches of Elafonisi, Falassarna and Balos which are located in Chania.

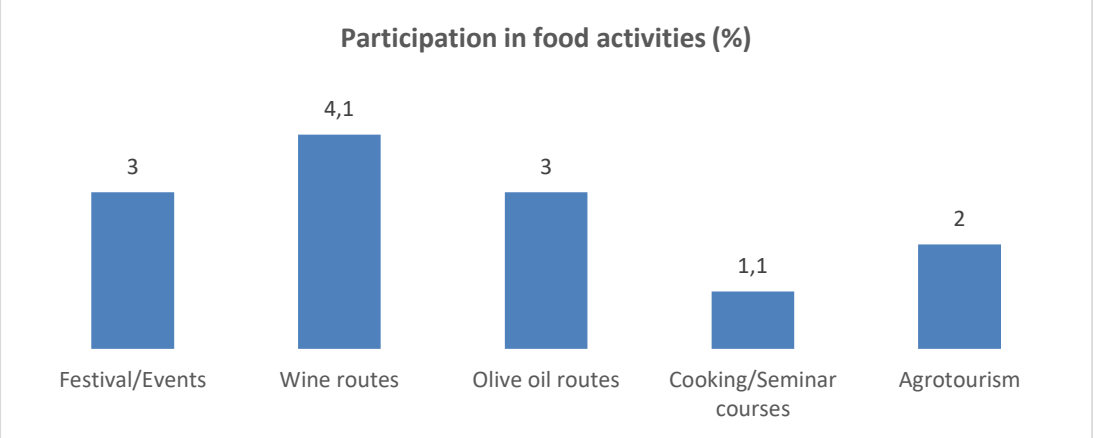


Figure 6.17 Participation of tourists in food activities
Source: Author's own work

Almost half of tourists' budget (47%) was spent on food during their holidays in Crete. That percentage is considered high compared to the global average percentage, which reflects their preference and trust in the high quality local agricultural products.

Although the majority of tourists stated that they could find local agricultural products at their hotels, there was a very high percentage (37%) of tourists that declared that those products were not available at their hotel accommodations. This is something that should be improved, because the hotel accommodations should provide and promote high quality local agricultural products and not products from other cities or countries which may not be of such high quality. Moreover, this deteriorates the total food image of the destination, since tourists cannot find the authentic agricultural products at their touristic accommodations.

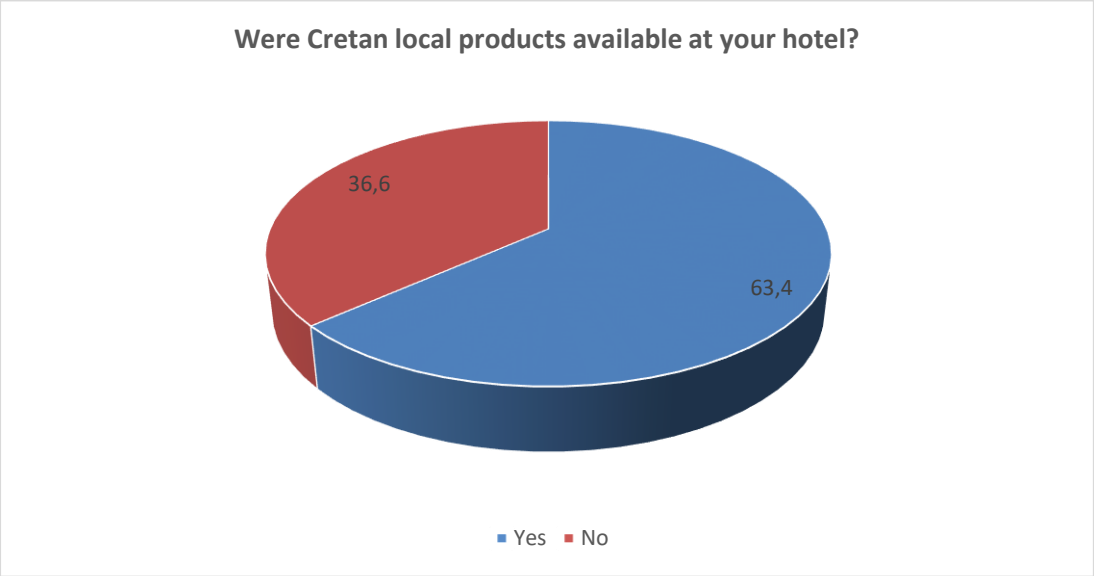


Figure 6.18 Availability of Cretan local products at the hotel
Source: Author's own work

Almost three out of ten tourists preferred the all-inclusive package with the same percentage preferring breakfast only. Almost one out of five tourists selected half-board and one out of four tourists did not select any food package but room only. A high percentage of tourists preferred to stay in their accommodation for food in the fear of going out and getting affected by coronavirus.

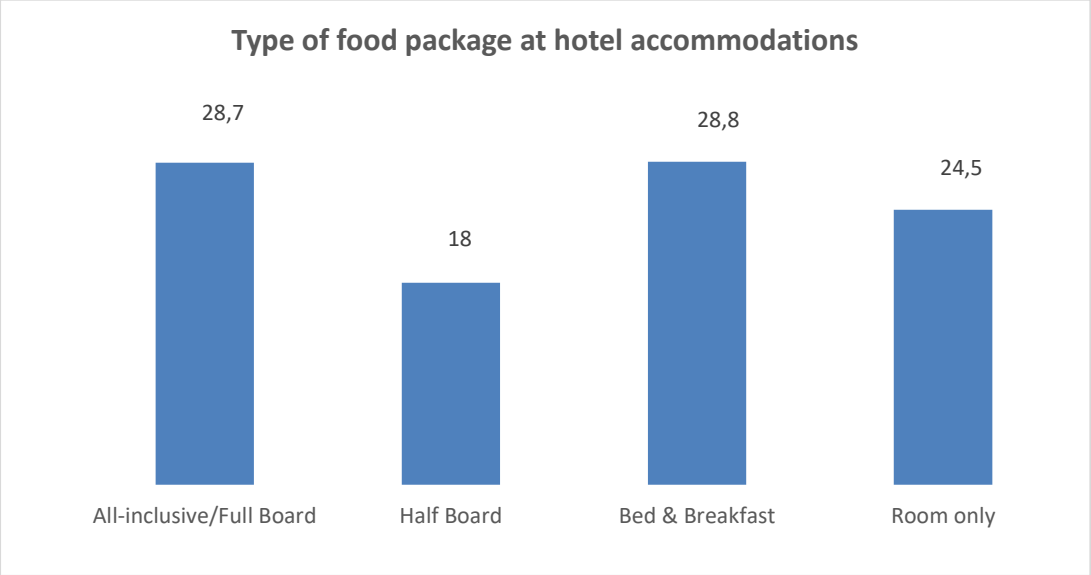


Figure 6.19 Type of food package at hotel accommodations
Source: Author's own work

The majority of tourists, almost four out of five (79%), consumed local agricultural products at restaurants/tavernas, 14% at hotel restaurants, 6% at special Cretan food places and below 1% at farms or street markets. The market share of the distribution channels of local agricultural products should be enlarged to all food establishments.

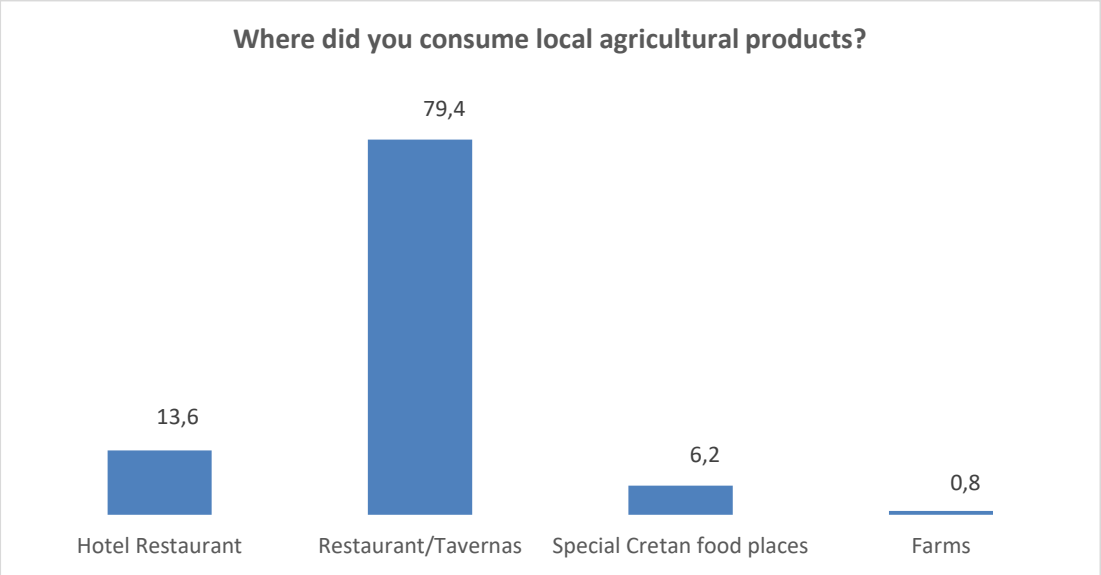


Figure 6.20 Place of consumption of local agricultural products
Source: Author's own work

A very positive element was that 94% of tourists were satisfied and very satisfied with tavernas/restaurants, with half of them expressing their absolute satisfaction of the services and the quality of the food they were served.

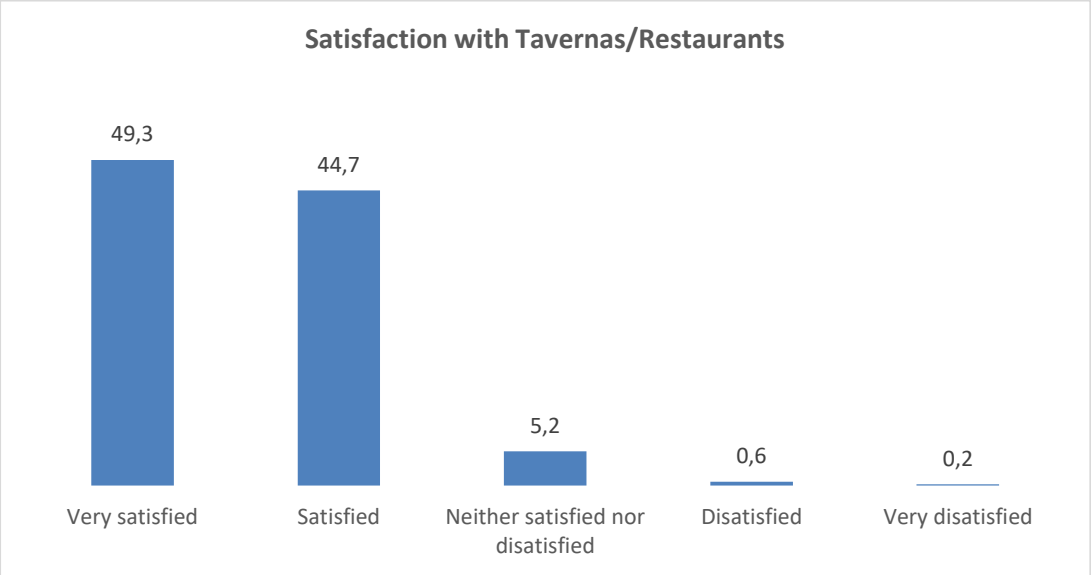


Figure 6.21 Satisfaction with Tavernas/Restaurants
Source: Author's own work

A high percentage of tourists (87%) were also satisfied and very satisfied with café shops, with almost one out of three visitors expressing their absolute satisfaction.

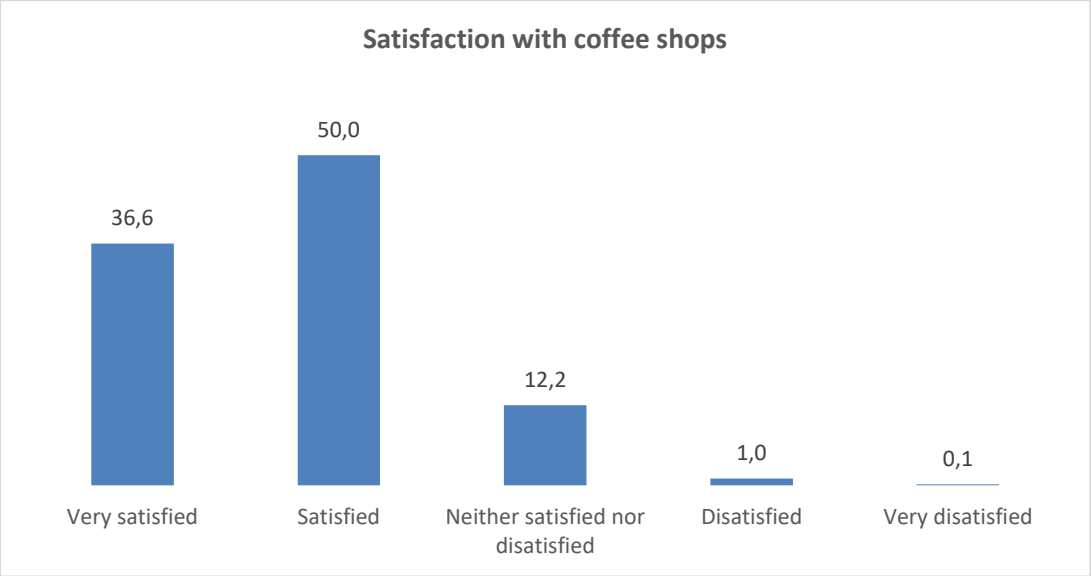


Figure 6.22 Satisfaction with coffee shops
Source: Author's own work

The vast majority of tourists (84%) expressed the opinion that food experiences in Crete met their expectations by stating "much" and "very much", highlighting their satisfaction of the high quality agricultural products. Moreover, the recommendations that many tourists had from friends and relatives lived up to be true.

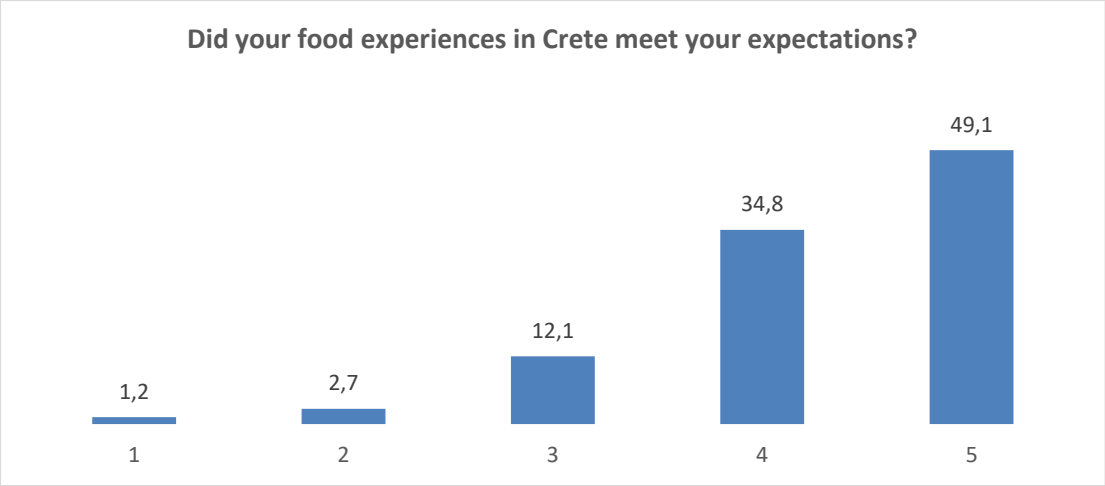


Figure 6.23 Food experiences and meet of expectations
Source: Author's own work

Almost two out of three tourists declared that they would like much and very much to find Cretan local products in their country, highlighting their satisfaction and trust in Cretan high quality local agricultural products.

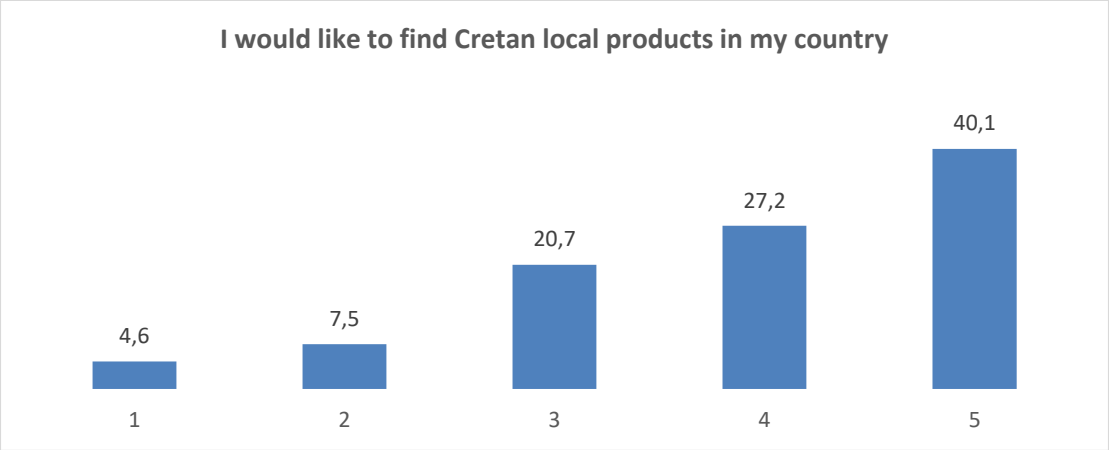


Figure 6.24 Willingness of availability of local products in tourists' country
Source: Author's own work

6.6.3 Structural Equation Model analysis

Structural equation modeling (SEM) is a statistical technique used to analyze multivariate relations between variables. With foundations in causal modeling, SEM combines aspects of factor analysis with regression analysis to enable testing theories and modeling associations between observed and unobserved variables. SEM is a method that can be used to incorporate observable and latent variables (or factors) into structural models. It is a multivariate

statistical framework used to test complex hypotheses about relationships between observed and unobserved (latent) variables and to quantify the direct and indirect effects of one variable on another. It combines factor analysis and path analysis to assess entire networks of causal relationships in a single model.

By specifying multiple interrelated equations, SEM helps researchers understand the underlying mechanisms and pathways through which variables influence each other. This method provides valuable insights into complex systems and can help inform theoretical models, make predictions, and guide decision-making in a variety of research areas.

The use of these models is widely used in the literature when one wants to identify facets of the behavior of individuals on a particular behavior or opinion (Zhang et al., 2018), in the social sciences, psychology, economics and especially in tourism studies (Nunkoo et al., 2013).

The items in this survey were measured through a five-point Likert-type scale, ranging from 1 = strongly disagree to 5 = strongly agree in order to perform a SEM analysis. 26 questions (as shown in the following Table), were answered by tourists in order to explore the drivers that affect behavioral intentions.

Table 6.1 Questions regarding the constructs of the extended TPB

Variable/	Dimension	Litterature
Were you satisfied with the following characteristics of Cretan local products (freshness) ? (V1)	Visitor's Satisfaction on Local food Products	Choe and Kim 2018 Madaleno et al. 2017 Meng et al. 2016 Sung et al., 2016 Vesci and Botti 2019 Zhang et al. 2018
Were you satisfied with the following characteristics of Cretan local products (appearance) ? (V2)		
Were you satisfied with the following characteristics of Cretan local products (taste) ? (V3)		
Were you satisfied with the following characteristics of Cretan local products (quality) ? (V4)		
Were you satisfied with the following characteristics of Cretan local products (price ? (V5)		
Were you satisfied with the following characteristics of Cretan local products (varieties) ? (V6)		
Eating local food products gives pleasure (V7)	Attitude	
Eating local products in its original place is exciting (V8)		
Eating local products on holiday helps to relax (V9)		
Eating local products evokes memories (V10)		
It is important to me that the local products I eat on holiday look nice/taste good (V11)	Perceived Quality	
I consume local products because they contain a lot of fresh ingredients produced in a local area (V12)		
Experiencing local products increases my knowledge about different cultures (V13)		
It is valuable for me to consume local products (V14)	Perceived Value	

Trying local food while traveling is very important for me (V15)		
Tasting local products in an original place is an authentic experience for me (V16)		
I like to talk to people I respect about my local product experiences (V17)	Subjective Norms	
Tasting local products enables me to have an enjoyable time with friends/family that are important for me (V18)		
Most people who are important to me think I should consume local food when traveling (V19)		
I am constantly confident to sample new and different food products (V20)	Perceived Behavioural Control	
Whether or not I consume local food when traveling is completely up to me. (V21)		
I have time, money, and information to consume unfamiliar local food when traveling. (V22)		
I intend to revisit Crete to savour its local products (V23)	Intention	
I expect to consume more local food if I have a chance to revisit (V24)		
I want to give advice about local product experiences to people who want to travel (V25)		
I am willing to recommend Cretan local products to others (V26)		

Source: Author's own work

In the following figure, the Structural Model is depicted together with the Hypotheses.

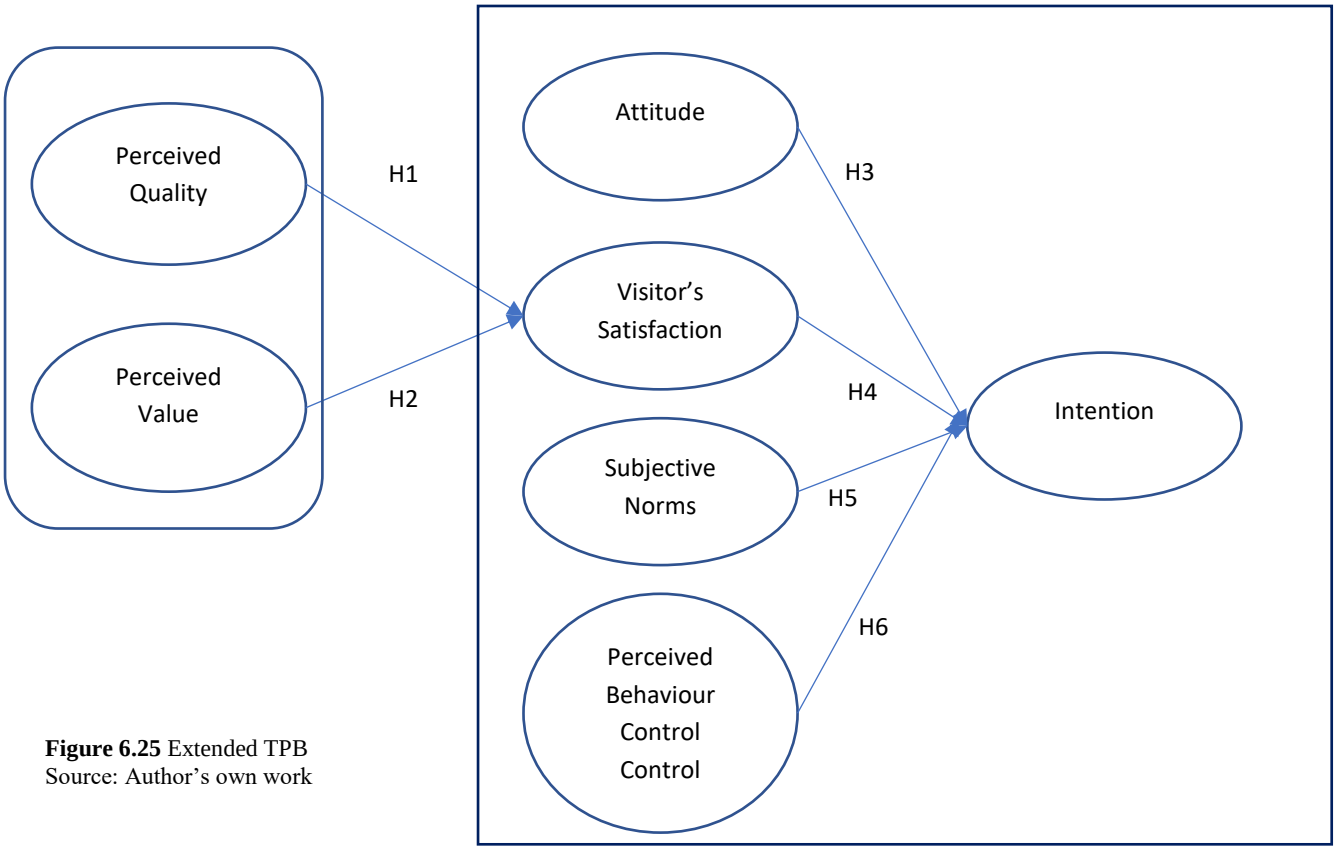


Figure 6.25 Extended TPB
Source: Author's own work

The Hypotheses to be tested were the following:

H1. Perceived quality is positively related to visitor's satisfaction
H2. Perceived value is positively related to visitor's satisfaction
H3. Attitude is positively related to Behavioral Intention
H4. Visitor's satisfaction is positively related to Behavioral Intention
H5. Subjective Norms are positively related to Behavioral Intention
H6. Perceived Behavior Control is positively related to Behavioral Intention

In order to use the SEM methodology to compare a given structure between groups, the invariant of the structure between groups must first be identified, followed by the use of an appropriate SEM technique. To evaluate the structure's invariant, all associated parameters must be set to the same value in a particular structure for all groups. When a limited SEM adequately matches the data, the supplied structure is invariant.

Using the goodness of fit of an invariant structure, structural invariance between groups can be examined. In short, given a structure, SEM approach could be used and considered well-fitting when: (1) the goodness of fit depending on the p-value ; (2) the root mean square error of approximation (RMSEA), which considers the approximation error in a population and how well, if at all, the model would match the population covariance matrix.

According to Browne and Cudeck (1993), RMSEA values ≤ 0.05 can be considered as a good fit, values between 0.05 and 0.08 as an adequate fit, and values between 0.08 and 0.10 as a mediocre fit, whereas values > 0.10 are not acceptable.

The outcomes of the descriptive analysis of SEM are shown in the following Table (Table 6.2). The high degree of tourists' satisfaction for local food attributes such as taste, quality, freshness, appearance, price and varieties is evident.

Table 6.2 Descriptive statistics of SEM analysis results

	Mean	Std. Deviation	Skewness	Kurtosis
	Statistic	Statistic	Statistic	Statistic
Were you satisfied with the following characteristics of Cretan local products (freshness) ?	4,49	0,602	-0,831	0,327
Were you satisfied with the following characteristics of Cretan local products (appearance) ?	4,41	0,631	-0,765	0,529
Were you satisfied with the following characteristics of Cretan local products (taste) ?	4,52	0,625	-1,215	1,724
Were you satisfied with the following characteristics of Cretan local products (quality) ?	4,46	0,628	-0,949	1,087
Were you satisfied with the following characteristics of Cretan local products (price ?	4,17	0,780	-0,854	0,862
Were you satisfied with the following characteristics of Cretan local products (varieties) ?	4,15	0,790	-0,834	0,804
Eating local food products gives pleasure	3,67	0,514	-1,372	1,771
Eating local food products in its original place is exciting	3,55	0,591	-1,028	0,629
Eating local food products on holiday helps to relax	3,29	0,701	-0,644	-0,143
It is important to me that the local products I eat on holiday look nice/taste good	3,64	0,531	-1,142	0,696
I consume local food products because they contain a lot of fresh ingredients produced in a local area	3,51	0,544	-0,485	-0,777
I like to talk to people I respect about my local product experiences	3,16	0,757	-0,537	-0,319
Tasting local products enables me to have an enjoyable time with friends/family that are important to me	3,54	0,607	-1,145	1,214
It is valuable for me to consume local products	3,62	0,546	-1,146	0,758
Trying local food while traveling is very important for me	3,70	0,533	-1,741	3,105
I am constantly confident to sample new and different food products	3,41	0,683	-0,885	0,165
Tasting local products evokes memories	3,32	0,718	-0,799	0,178
Experiencing local products increases my knowledge about different cultures	3,59	0,545	-0,993	0,617
Tasting local products in an original place is an authentic experience for me	3,65	0,512	-1,054	0,428
Whether or not I consume local food when traveling is completely up to me.	3,41	0,631	-0,778	0,423
I have time, money, and information to consume unfamiliar local food when traveling.	3,39	0,613	-0,593	0,050
Most people who are important to me think I should consume local food when traveling	3,29	0,686	-0,728	0,464
I intend to revisit Crete to savour its local products	3,63	1,209	-0,602	-0,519
I expect to consume more local food if I have a chance to revisit	3,48	0,632	-0,946	0,417
I want to give advice about local product experiences to people who want to travel	3,19	0,753	-0,639	-0,019
I am willing to recommend Cretan local products to others	4,17	0,954	-1,073	0,672

Source: Author's own work

Thus, it is of utmost importance to include satisfaction in the extended Theory of Planned Behavior Model. The Figure below shows the path diagram generated using the Stata 17. This path diagram can be employed to analyze the invariant of motivation structure, given by the following figure.

The Chi square statistical value of 15579.64 (with p value 0.000) indicates the robust results of the model.

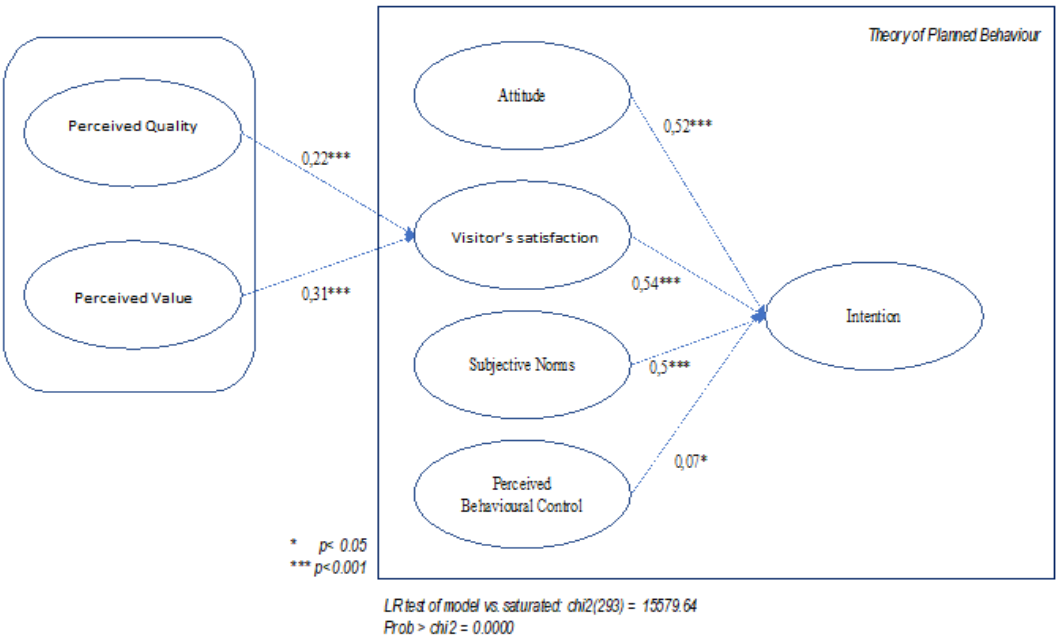


Figure 6.26 Results of the SEM analysis of the extended TPB
Source: Author's own work

All the Hypotheses underlying the model turn out to be significant. The perceived quality (H1) and perceived value (H2) of local food have a positive (0,22 and 0,31 coefficient, respectively) and significant influence (p-value less than 0.001) on visitors' satisfaction; in turn, visitors' satisfaction (H4) was found to be the most important dimension (0,54 coefficient) in influencing positively and significantly (p-value less than 0.001) the intention to consume, recommend local agricultural products and revisit Crete. These findings are line with the survey of Sung et al. (2016).

Attitude (H3), Subjective Norms (H5) and Perceived Behavior Control (H6) are also related positively (0,52, 0,5 and 0,07 coefficient, respectively) and significantly to behavioral intentions. All tested relationships are significant with a p-value less than 0.001, apart from the construct of Perceived Behavioral Control which seemed to be significant with a p-value less than 0.05 and a coefficient of 0,07 which has almost no effect in influencing behavioral intentions. These findings are almost in line with previous tourism studies (Han et al., 2010; Lam & Hsu, 2006; Quintal et al., 2015; Vesci and Botti, 2019).

6.7 Discussion

This survey took place in 2021, one year after the outbreak of the pandemic, when it was difficult for older people to travel in order not to be affected by COVID-19; the majority of tourists were young, below 34 years old. Therefore, future research should also include more tourists aged 35 years and over, especially senior foodies who are seeking to taste local food products and also have a higher income level (Balderas-Cejudo et. al., 2019). Moreover, concerning nationalities, a substantially decreased number of Scandinavian tourists were observed at the airport of Chania compared to periods before the pandemic, due to COVID-19 restrictions that were imposed from their home countries; in the future, surveys with a higher percentage of those nationalities are therefore expected to be included in the sample size.

One out of five tourists were students. The annual average family net income was around 60.000 euros, an amount which is not so high due to lots of young tourists and the reduction of Scandinavians who used to be among those with a higher level of income. They spent 800-850 euros per visit of group during their vacations, excluding the expenses for air tickets and accommodation. This amount is not considered so high, due to large numbers of young people and lower numbers of Scandinavians. The vast majority of them stayed in Chania for a week, since they preferred the airport of Chania as a final destination. Close to one out of three tourists had visited before Crete, but this is low given the significant reduction of Scandinavians who were repeaters and the increase of young tourists who came to Crete directly from their home town, mainly through non low-cost flights (regular charters). The majority of the tourists stayed at luxurious hotel accommodations since the prices were very low during the coronavirus period and also in villas at a significant percentage, in order to avoid overcrowding at hotel accommodations. There is a significant percentage of tourists who came with friends as company rather than relatives, making all the travel arrangements alone and not through a travel agency/tour operator.

It is a fact that there is a tendency of tourists in the last years to seek out local food and beverages while traveling in a touristic destination. This tendency seems to hold in Greece during the pandemic as well, where tourists had a more positive attitude towards food than before COVID-19 and were more motivated to consume local food, resulting in spending

more money on food and being more willing to taste local food and visit Greek food establishments (Lazaridis et al., 2022).

In this research, it has been proven that a significant percentage of tourists, three out of ten, claimed that food experiences were very important in order to choose Crete as their final destination, and half of tourists declared that food experiences very much met their expectations. Moreover, almost half of the tourists' budget was spent on food and beverages, consuming them mainly at restaurants/tavernas and cafeterias with a high degree of satisfaction. The consumption of local agricultural products was at a satisfactory level, by purchases mainly of olive oil, wine, cheese, fresh orange juice, tsikoudia, honey, herbs & spices and rusk bread. A high percentage of tourists preferred to stay in their accommodations for food, but almost one out of three tourists declared that the local agricultural products were not available at their accommodations, which could deteriorate the food destination image of Crete. Finally, a very high percentage expressed the view that they would like to find Cretan agricultural products in their country, highlighting their high degree of satisfaction.

Moreover, the behavioral intentions of tourists were investigated with an extended Theory of Planned Behavior Model including satisfaction as a mediator between perceived value, perceived quality and behavioral intentions. It was found that perceptions of the value and quality of local food have a positive influence in the construct of visitors' satisfaction, which in turn positively affects the intentions to consume, recommend local agricultural products and revisit Crete revisit and recommend Crete as a touristic destination. Moreover, satisfaction seemed to be the most important dimension together with attitude and subjective norms, whereas perceived behavior control, albeit having a positive and significant effect on behavioral intentions, does not have such a strong impact compared to the other components.

However, more dimensions that directly or indirectly influence tourists' behavioral intentions could be included in an augmented model, such as perceived benefits from sustainability, authenticity, trust, marketing, distribution, food involvement, food neophilia and destination image. Finally, in this research, only tourists were included in the sample. For a broader view, local stakeholders' network should be asked as well in order to have a more holistic approach for the sustainable development of food tourism.

CHAPTER 7

TOURISM SURVEY B

7.1 Introduction

In this research, the limitations of the previous research were taking into considerations. The survey took place at the airport of Chania in 2023, after coronavirus period, having a sample of tourists whose profile was similar to the profile of tourists who visit Western Crete before the coronavirus period. Moreover, more dimensions that directly or indirectly influence tourists' behavioral intentions could be included in the model, such as perceived benefits from sustainability, authenticity, trust, marketing and distribution; food neophilia, food involvement and destination image. Depending on the levels of satisfaction of perceptions and attitudes towards local food values, tourists' behavioral intentions to recommend a destination due to its local products, to revisit a destination to savour the local products, to be willing to pay more for local products, as well as the desire to find them in their country by enhancing destination image, are of utmost importance.

Tsai and Wang (2017) found that only consumers' return on investment has a significant effect from the experiential values to place food image, which in turn influence tourists' behavioral intentions. Choe and Kim (2018) examined the effect of local food consumption values to food destination image through attitudes, finding out that only taste/quality value, emotional value and epistemic value have a significant influence on attitude that affect food destination image and in turn behavioral intentions. Chang and Mak (2018) considered food neophilia, authenticity, and convenience, among others, as attributes of local food that could influence gastronomic image, while Al-Ansi and Han (2019) emphasized the significance of trust in the destination image and behavioral intentions. Apak and Gurbuz (2023) supported the fact that the consumption of local food has a positive effect on sustainability dimensions. Kim et al. (2019d) supported that wine promotion increases behavioral intentions through satisfaction and Choo et al. (2022) stated that local food involvement directly and indirectly affects destination loyalty through satisfaction. The Theory of Planned Behavior (TPB) is used by Zhang et al. (2018) to find the influence of attitudes, perceived behavior control and subjective norms on behavioral intentions.

The following research is the first attempt to try to identify and incorporate all of the above drivers that directly or indirectly influence tourists' behavioral intentions in one model. More precisely, an extended TPB is used to examine the effect of local food consumption values on attitude, the effect of perceived benefits on satisfaction, and the effect of attitude and satisfaction on the destination image, which in turn affect tourists' behavioral intentions. Moreover, the direct influence of attitude, perceived behavior control, subjective norms, food involvement and food neophilia on behavioral intentions is tested together with the indirect effect of food involvement and food neophilia on behavioral intentions through satisfaction and the destination image. The results showed that all the relationships in the model are statistically significant, influencing behavioral intentions in a direct or indirect way.

7.2 Theory of Planned Behavior

The Theory of Planned Behavior (TPB) is widely used in different sectors and in the Food Industry as well. The main components of the TPB are attitudes, subjective norms and perceived behavior control that affect tourists' behavioral intentions. Attitude is influenced by various attributes. Chavarria and Phakdee-auksorn (2017) found that affection, perceived service quality and satisfaction are more significant elements than hygiene, value for money, and food quality affection affecting tourists' attitude, which in turn influence tourists' behavioral intentions towards street food together with subjective norms and perceived behavior control. Food and beverage quality was determined to be the most influential factor in predicting attitude toward behavioral intention than staff service and information adequacy in small and local culinary festivals, whereas perceived behavior control was not an antecedent of revisiting intention (Vesci and Botti, 2019).

Concerning wineries, the winescape service staff, complementary products, winescape settings and wine value were significantly influencing wine tourists' attitude compared to wine quality, atmospherics and signage, which together with subjective norms and perceived behavior control, positively affect behavioral intentions to recommend and revisit (Quintal et al., 2015). Regarding restaurants, concerns for food safety and table manners could deteriorate tourists' attitudes toward consuming unfamiliar local food, compared to communication and food's sensory appeal, which are not important elements in predicting their attitudes toward local food, and which in turn affect behavioral intentions together with

perceived behavior control and subjective norms (Wu et al., 2016). Attitudes, subjective norms, and perceived behavioral control positively influence domestic tourists' behavioral intentions to consume local food, with benefit perceptions being a significant positive predictor of attitudes and behavioral intentions, whereas risk perceptions do not influence attitudes but negatively affect behavioral intentions in a direct way (Zhang et al., 2018). Moreover, attitudes, subjective norms, and perceived behavioral control have positive and significant effect on intention to revisit a destination (Recuero-Virto and Arrospide, 2024).

In an extended model of TPB, including normative beliefs, perceived benefits to business, perceived difficulties in production and the service of indigenous dishes as well as customer patronage, Bondzi-Simpson and Ayeh (2017) found that perceived benefits had no significant effect on attitudes, and attitude had a non-significant influence on intention to add more indigenous dishes on small and medium hotel menus in developing economies, whereas although tourists from South East Asia appear to have a lot in common in their consumption intentions, they are different in terms of how they intend to consume Dayak ethnic food in Malaysia based on attitude, subjective norms and perceived behavior control (Ting et al., 2019). Perceived behavior control, subjective norms and negative anticipated emotion were found to be more significant factors to desire, while other elements, such as attitude and positive anticipated emotion, are less critical constructs to that of desire, using an extended model of goal-directed behavior to examine tourists' intentions (Meng and Choi, 2016).

7.3 Local Food Consumption Value

In spite of the significance of consumption value theory, there is only a limited number of researches that have explored the dimensions of food consumption value that tourists acquire in a food tourism destination (Choe and Kim, 2019). A first attempt using the consumption value theory was attained from Sheth et al. (1991), who proposed a conceptual model for consumption value, consisting of functional, emotional, social, epistemic, and conditional values. Comparing customers' behavior in restaurants of three countries, Croitoru et al. (2024) showed that emotional value is a common factor that positively influences satisfaction in all three countries, whereas the other values have context-dependent effects, with greater relevance in certain countries.

Hsu et al. (2022) used those dimensions together with cultural and health values to examine the food experiences and behavioral intentions from a cross-cultural perspective, concluding that emotional value, health value, and cultural value significantly affect tourists' food experience. Nevertheless, in the last years, it seems that conditional value is not included as one of the consumption value dimensions in food tourism research, whereas other studies included some and not all the factors of consumption value. In their survey, Kim et al. (2019a) concluded that the three values, namely functional (quality and health), hedonic (emotional) and financial (price), and not the social value (interaction and prestige) influence loyalty among Grocerant customers, whereas Chen and Peng (2018) indicated that functional value (quality/taste), symbolic/expressive value (prestige and interaction) and hedonic value (emotional), and not the financial value may affect consumers' attitudes toward luxury restaurants, which in turn may influence their purchase intentions.

There are only a few studies that use all seven factors of consumption value, namely taste/quality value, health value, price value, emotional value, prestige value, interaction value and epistemic value (Choe and Kim, 2019; Choe and Kim, 2018). In Hong Kong, apart from prestige value, all the other factors, such as taste/quality, epistemic, interaction, health, emotional, and price value were considered as significant factors positively influencing tourists' overall satisfaction with tasting local food (Choe and Kim, 2019), whereas according to Choe and Kim (2018), only taste/quality, epistemic and emotional value positively affect tourists' attitudes toward local food. Apak and Gurbuz (2023) used that seven-factor model as variables for local food, substituting epistemic value with cultural experiences and emotional value with exciting experiences. They found out that local food has a significant and positive effect on sustainable tourism and its subscales (economic, socio-cultural, and environmental sustainability).

Cultural experiences and excitement together with interpersonal relations (interaction value), sensory appeal (quality value) and health concerns were used in the study by Rodríguez-Gutiérrez et al. (2020), as variables of gastronomy motivations, showing that the satisfaction of tourists visiting the city of Popayán, a destination recognized as a Creative City of Gastronomy by UNESCO, is influenced by the motivations of tourists regarding the gastronomy of the destination, not directly, but indirectly through the attitude towards culinary experience. Moreover, the same five factors, were used in the research of

Williamson and Hassanli (2020), as motivators of local food consumption in the binary logistic regression model together with other variables, pointing out the importance of the cultural motivation of tourists in increasing experiential loyalty. Those factors were also used as push motivations to better understand the wine tourist engagement with wine regions in Australia Gaetjens et al. (2023), whereas among those motivational factors, only excitement has a statistical significance and a negative impact on the decision of international tourists to purchase local agrofood products in Portugal (Madaleno et al., 2017). In the latter survey, price and prestige values were not included in the respective models.

Prestige value was used in the survey of Sung et al. (2016) to describe the good reputation of Hualien's Amis Harvest Festival in Taiwan, which together with the emotional, quality and price value were considered as factors of perceived value that positively influences the behavioral intentions through visitors' satisfaction. Prestige value was also used at Halal Food Establishments to describe customer acceptance, which together with spiritual dimension were considered as the most significant components of customers' emotional experience (Tama and Voon, 2014) whereas Lee et al. (2019a) explored the positive influence of a set of components of consumers' prestige values on behavioral intentions through affective commitment at premium food markets.

Food price and quality values were used as push motivations towards decision-making in Malay upscale restaurants (Basri et al., 2016), whereas wine price and wine quality were also incorporated in winescape attributes that influence behavioral intentions through attitudes towards wineries (Quintal et al., 2015). Food and beverages quality was one of the main dimensions that strongly determine customers' attitude toward local small Italian culinary festivals and their revisiting intentions (Vesci and Botti, 2019), while wine taste and education were considered as primary motivations that have a positive effect on return intentions through product involvement (Afonso et al, 2018). Shin et al. (2019) used price and quality values as utilitarian values which positively influence consumers' intentions, not directly as hedonic values do, but indirectly through attitudes towards food trucks, while the major attributes of food specialties and souvenirs are the sensory, utility, and symbolic dimensions (Lin and Mao, 2015).

The taste of a winery's products was on the top of the most important motivational factors when participating in wine tourism activities in Greece (Alebaki et al., 2015), whereas the food taste image was the only food image factor which precisely predicted the food preferences and consumption of all tourists, irrespective of their nationalities (Promsivapallop and Kannaovakun, 2019). Russian tourists especially appreciate the freshness as a quality value and health value associated with local food in Finland (Mynttinen et al., 2015), while only sensory appeal and health value were found to have a positive effect in consuming ethnic food in Malaysia (Ting et al., 2017). Quality, price and emotional values are the ones which are included as perceived tourist values that directly influence the purchase intentions of food-related souvenirs (Chen et al., 2022), whereas food price and quality, among other variables, were included as gastronomic perceived value that directly influence loyalty to the destination or indirectly through gastronomic satisfaction (Mora et al., 2021).

Taste as a quality value, knowledge as an epistemic value, enjoyment as an emotional value and socialization as an interaction value were used by Kraftchick et al. (2014) as the main motivational factors for tourists to visit North Carolina Breweries, whereas Yang et al. (2020) emphasized the importance of quality, knowledge and enjoyment as the main motivations which play a significant role in creating a favorable culinary destination image. Different outcomes are derived from the survey of Di Matteo (2021), stating that entertainment and education variables, in other words, emotional and epistemic values retrospectively, have a negative impact on visitors' perceptions in street food events, among other variables included in a probit model.

The importance of understanding diverse consumer motivations is further emphasized by Tiganis and Chrysochou (2024), who utilized the Best-Worst Scaling analysis to identify that while sensory appeal and quality are universal preferences, distinct market segments exist based on varying levels of food involvement and interest in local heritage. Their research highlighted that a "one-size-fits-all" marketing approach is insufficient for complex food tourism destinations, as different tourist clusters prioritize different attributes of the local food experience. This mirrors the findings of the current study regarding the primary influence of taste and quality value while suggesting that the strategic segmentation of international visitors can lead to more effective destination branding and higher levels of behavioral intention.

Finally, the multidimensional nature of food choice is further illuminated by Suhartanto et al. (2025), arguing that the selection of culturally themed dining experiences is driven by a complex interplay between sensory taste, personal identity, and a sense of community. Their research suggests that, beyond the functional attributes of a meal, tourists seek dining environments that reinforce their social identity and foster communal bonds.

7.4 Perceptions of benefits from the consumption of local foods

Perception is a concept from the sphere of "Self" and its study in the social sciences is of primary importance since it indirectly influences the formation of predetermined behavior (Markus and Kitayama, 2010; Masi et al., 2022; Vecchio et al., 2022), for example tourists' behavioral intentions. In tourism research, perception is studied by analysing aspects related to sustainability, authenticity and trust, market and distribution.

7.5 Food sustainability

The consumption of local food from tourists has a positive effect on economic, socio-cultural and environmental sustainability (Apak and Gurbuz, 2023). Local traditional foods could contribute to the economic sustainability of rural areas, especially when there is a strong multifunctional value and the quality is well recognized (Casini et al., 2016). Local food events could also enhance economic welfare in rural and regional areas by attracting tourists and generating expenditure in the local economy (Star et al., 2020), while Thelen and Kim (2024) in their study confirmed that social and environmental sustainability are symbiotic in food festivals, and thus their mutual influence and interplay must be considered in planning long lasting and sustainable food tourism events. Strengthening agriculture and tourism linkages, through the supply of local food to hospitality service providers, could be used as a strategy to maximize economic benefits, by boosting economic development and encouraging youth employment in sustainable tourism development (Thomas-Francois et al., 2017). Moreover, the strength of the sectorial interlinkages could also enhance local culture development by the provision of authentic culinary products (Wondirad et al., 2021), as well as supporting food stability and security of a tourism destination as well (Degarege and Lovelock, 2021).

The connection between food security, socio-ecological, health and ethical issues was described by Bertella (2020) on the reflections of the COVID-19 crisis, whereas Barlagne et al. (2015) suggested that to increase food security, it would be better to focus on a labelling strategy, by increasing consumers' awareness about the sustainable characteristics of local food, while Schmitt et al. (2017) found that the strength of local products was mainly pinpointed in socio-economic and health aspects. The Mediterranean Diet could also be used as a potential tool for enhancing the economic and sociocultural sustainable development of the developing countries Moro (2016), while the social impact of tourism was analyzed by Alamineh et al. (2023), emphasizing the crucial role of responsible management from all the stakeholders for the development of the local community.

Responsibility and socio-environmental sustainability were also discussed in hospitality industry by promoting sustainable messages that could stimulate consumer's perception of sustainability, shaping more responsible consumer choice through the menu design (Filimonau and Krivcova, 2017) and leading to a more positive attitude toward the company (Line et al., 2016). The attitude toward green behavior has a significant effect on the overall image of environmentally friendly food service providers, which in turn significantly influence re-visit intention, positive word of mouth and willingness to pay (Lita et al., 2014). Environmentally sustainable practices were also used in different fields such as to connect tourist routes with organic agriculture (Pellegrini et al., 2023) and to measure and minimize wine tourism-related carbon emissions that could expand environmental sustainability (Sun and Drakeman, 2020).

Wine involvement, environmental attitude, perceived behavioural controls were identified as core traits prompting young adults in Italy and France to experience sustainable wine tourism (Vecchio et al., 2024), while Recuero-Virto and Arrospide (2024) emphasized the importance of integrating risk mitigation actions and managing emotional states to design strategies for the sustained growth of the tourism industry in the Basque Region.

7.6 Food authenticity and trust

The perceived authenticity of a product depends on its origin, which is comprised of dimensions such as history, place, local community and naturalness. According to Bryła

(2015), the most important factors of food origin are the traditional recipe, taste and product uniqueness that are oriented to traditionality and territoriality characteristics. Tourists seek the novelties and familiarities of food attributes in order to perceive, understand, appreciate and reject authenticity (Cai et al., 2021). Unfamiliar food-related attributes such as food names and ingredients significantly enhance customers' perceptions of authenticity and induce positive emotions, which in turn positively affect the purchase intentions (Kim et al., 2017), while Youn and Kim (2017) included as well stories about food origins that increase purchase intentions through the enhancement of consumers' perceptions of authenticity. Privitera and Nesci (2015) stated that street food also contributes to authentic tourists' gastronomic experiences, offering a connection with food, place and tourism.

Özdemir and Seyitoğlu (2017) defined three types of tourists, namely authenticity seekers, moderates and comfort seekers, to describe the expected tourist behaviors on local food consumption. First-time and repeat tourists have different expectations, perceptions and satisfaction with authentic local restaurants (DiPietro et al., 2019) due to the fact that, among others, the authenticity of dining experiences needs an integrated multi-dimensional approach (Le et al., 2019). Authenticity is one of the intrinsic factors in defining an individual's culture and society by retaining the image of ethnic tradition, while regarding the preservation of group identity, as far as diasporic communities are concerned, the maintenance of traditional foodways through authenticity is of utmost importance (Muhammad et al., 2016b).

Tourists' trust in the local product and services was evaluated as the third significant component within the six-dimensional structure of experience quality that affects satisfaction, loyalty and word-of-mouth in the wine cellars (Fernandes and Cruz, 2016), while tourists' experiential value of pop-up restaurants increases the levels of relationship quality, as reflected in trust and satisfaction toward pop-ups, which in turn leads to positive behavioral intentions (Taylor Jr. et al., 2018). Trust among stakeholders and between stakeholders and visitors are of utmost importance as well in the food tourism industry (Chien et al., 2018; Roy et al., 2017).

Trust-based relationships between farmers and other producers' suppliers with distributors in the food service industry are of vital significance in order to ensure local food accessibility, and at the same time, develop a competitive advantage for new entrants (Roy et al., 2017).

Consumer-perceived higher coproduction and image congruence positively affect consumer trust, which in turn enhances recommendation intentions in food-tourism factories (Chien et al., 2018). On the contrary, a lack of trust that the product and its ingredients are actually local could be considered as a barrier for tourists to purchase local food (Birch and Memery, 2020).

7.7 Food marketing and distribution

Marketing of local foods and destinations is very significant to attract tourists. Kim et al. (2019d) proved that wine promotion such as a promotion menu, basic information about wine, customer service and human sale positively influence customer satisfaction which in turn affects behavioral intentions. Winescape service staff and complementary products had significant influence on wine tourists' attitudes towards the winery, while winescape setting and wine value were also significant attributes in affecting wine tourists' attitudes (Quintal et al., 2015). A framework for website dimensions for the promotion of Halal culinary tourism and services was suggested by Yousaf and Xiucheng (2018), based on the culinary tourism strategies of each country.

On the contrary, there are some other marketing initiatives that were not well structured. The city of Istanbul has rich culinary resources, but such a leading urban destination is not successfully marketed and promoted as a culinary destination (Okumus and Cetin, 2018). Moreover, Spanish Autonomous Communities have not promoted their gastronomy very well as part of their cultural identity, since there were deficiencies in topics that refer to training, events and price policy (Jerez, 2023). Lack of training in food preparation for vendors, as far as food events are concerned, was also a drawback for vendors (Privitera and Nesci, 2015). A business development model for street food tourism was proposed by Praesri et al. (2022) focusing on price, product, people, process and physical evidence in order to understand the interest of tourists, while the creation of desire and sensory appeal were the top characteristics that describe Malaysia as a culinary tourism destination that provide excitement and anticipation among tourists as to what type of food experience they will take up during their travel (Jalis et al., 2014).

Moreover, inadequate distribution of local food in terms of unavailability and variety could lead to limited purchases of local food by tourists (Birch and Memery, 2020). Convenience in terms of eating and buying local food was found to be an important gastronomic image dimension of a tourist destination (Chang and Mak, 2018), while convenience including food preparation and cooking was not found to have a positive effect on intention to consume ethnic food (Ting et al., 2017). Convenience was one of the greatest concerns to consumers related to portability, fragility and use of food specialties, while the package can act as a reminder of a travel memory (Lin and Mao, 2015).

7.8 Food neophilia

Neophilic and neophobic tendencies, which are food-related personality traits, can encourage or impede tourists to try novel food at a destination. Tourists who demonstrated neophilic tendencies in consuming novel food acquire higher levels of satisfaction than their neophobic counterparts, which in turn has a positive effect on Word of Mouth and revisit intentions (Ji et al., 2016). Food neophobia and sensitivity to disgust are confirmed as personality traits that are able to impede the acceptability of a novel food (Torri et al., 2020), while tourists with a low level of food neophobia show a high level of purchase intention for traditional meals, and experience seeking has a negative correlation with food neophobia (Sivrikaya and Pekersen, 2020). Food neophobic tendencies had a positive effect on perceived well-being when consuming comfort food on international trips with demographics and consumption characteristics not affecting neophobic tourists' perceived well-being in Taiwan (Chang et al., 2022). However, neophobic levels were higher against ethnic food in Turkey among men, the elderly, and tourists with high education and income (Akin et al., 2023).

Food neophobia also plays a moderating role in tourists' decisions concerning their intentions to consume local food at restaurants, since perceived behavioral control has a significant power influence on tourists who are more food-neophobic, whereas the subjective norm has a significantly stronger effect on tourists who are less food-neophobic (Wu et al., 2016). The moderating role of novelty seeking was analyzed in the research of Taylor Jr. et al. (2018) who found that relationship quality had a stronger effect on return intentions and willingness to pay for the high group of novelty seeking than for the low group. Food-neophobic

tendencies had a positive effect on perceived well-being when consuming comfort food on international trips; demographics and consumption characteristics did not affect neophobic tourists' perceived well-being (Chang et al., 2022).

7.9 Food involvement

Food Culture Involvement had a significant impact on tourists' behavioral intentions that involves revisiting and repurchasing heritage food (Omar et al., 2015), while significant relationships between product involvement, price consciousness, and price/quality inference on willingness-to-pay were found at university food service operations (Campbell et al., 2014). Distinguishing consumers between local residents and travelers Lu and Chi (2018) found that when there is a low involvement, travelers' intentions towards three menu stimuli, namely visual, verbal, and control, are significantly different from those of residents; however, if there is a high involvement, both groups have the same intentions at restaurants. The research of Taylor Jr. et al. (2018) showed that involvement partially supported the moderators' effects of involvement between experiential value-relationship quality and relationship quality-behavioral intentions concerning growing pop-up restaurants, while gastronomic involvement was a significant predictor of customers' willingness to pay a price premium to dine at luxury restaurants (Kiatkawsin and Han, 2019).

Participation in wine events and product involvement enhance tourists' intentions to return to wine regions (Afonso et al., 2018), while consumer drinking frequency significantly and positively affects wine involvement, which in turn enhances the perceived importance of wine's appearance (Rahman and Reynolds, 2015). Moreover, wine involvement influences customer engagement not directly but rather indirectly through wine-related motivations (Gaetjens et al., 2023), whereas local food involvement enhances intentions to recommend and buy local food at food festivals, while it also positively influences engagement and positive emotions which are good predictors of food purchasing behavior six months later (Organ et al., 2015). Choo et al. (2022) proved that local food involvement not only directly influences loyalty but also indirectly through satisfaction and quality, while involvement could support moderating effects between quality and satisfaction on loyalty as well. Food

involvement directly positively influences destination image and could interact with time pressure and knowledge to enhance the destination image (Yang et al., 2020).

7.10 Food destination image

The significance of a destination's image is globally recognized in the tourism sector with food being one of the most integral and crucial factors (Lee et al., 2023), while a positive post-trip evaluation was found to play a significant role in further behavioral intention, thereby enhancing destination image (Gorgi et al., 2023). Gastronomic image may be perceived by tourists based on the "common-unique" dimension of seven categories of attributes of local food, such as attractiveness (emotional), flavor profile (quality), familiarity (food neophilia), cooking method and ingredients, distinctiveness (authenticity), convenience and price, and health & safety, which could act as a competitive advantage of a destination (Chang and Mak, 2018). Choe and Kim (2018) showed that tourists' local food consumption value, which consisted of taste/quality, health, price, emotional, prestige, interaction and epistemic value effectively explains the food destination image through tourists' attitude toward local food, which in turn positively affects tourists' behavioral intentions, whereas Lee et al. (2019b) concluded that destination image positively influences product evaluations which decayed over time, especially for low-involvement tourists.

Promsivapallop and Kannaovakun (2019) included restaurant service, food taste, health and hygiene, variety and eating manners, and unique cultural experience as factors that influence the food destination image, which have a higher effect on food preference than food consumption. Tsai and Wang (2017) stated that from the four types of experiential values, namely consumer return on investment, service excellence, aesthetics and playfulness, only the first one can significantly enhance a place's food image, which leads to the increase of behavioral intentions. Concerning halal destinations, Al-Ansi and Han (2019) supported that destination trust is a crucial factor that influences the overall destination image and future intentions, while the relationships between an ethnic restaurant experience's effects, the experience's influence on perceptions of a destination's food image and the mediation effect of this image between the experience and tourist intentions were examined by Aybek and Ozdemir (2022).

7.11 Food satisfaction

Several researches have tried to link satisfaction with behavioral intentions, since the increase of tourists' satisfaction of local food lead to positive behavioral intentions. Levels of satisfaction depend on the tourists' cultural background (Jia, 2020), socioeconomic characteristics (Sanchez-Cubo et al., 2023), the authenticity of the menu at restaurants (Liu and Mattila, 2015), the type of tourist regarding the need for experience at a destination (Perez-Priego et al., 2023), the dietary needs (religious, medical, lifestyle) of tourists (Mohammadi et al., 2023), the promotion of the local agricultural product (Kim et al., 2019b), push and pull motivations (Bayih and Singh, 2020; Rodríguez-Gutiérrez et al., 2020), experiences (Williamson and Hassanli, 2020), involvement (Choo et al., 2022) and perceptions (Al-Ansi and Han, 2019; Durmaz et al., 2022; Sung et al., 2016) these factors all have an influence on tourists' behavioral intentions. Gastronomy motivations could influence satisfaction through perceived value and experience that lead to favorable behavioral intentions (Mora et al., 2021). Push and pull motivations could influence satisfaction which could have a positive effect on intention to revisit a destination (Bayih and Singh, 2020), whereas gastronomy motivations cannot directly influence satisfaction according to (Rodríguez-Gutiérrez et al., 2020).

According to Durmaz et al. (2022), the perception of gastronomy tourism has a positive and significant effect on destination satisfaction and consumer behavior while destination satisfaction has a positive and significant effect on consumer behavior. The perceived value and perceived quality of a destination have a direct effect on satisfaction, which in turn influences behavioral intention (Sung et al., 2016), while perceived value, which is influenced by destination performance, affects satisfaction, which influences loyalty (Al-Ansi and Han, 2019). Loyalty could also be influenced by involvement, through satisfaction (Choo et al., 2022), while the centrality of local food to tourists, together with cultural motivation and satisfaction, were found to be the most important factors for the increase in experiential loyalty (Williamson and Hassanli, 2020). Moreover, satisfaction with traditional restaurants affects tourists' overall image of a destination, and also positively affects their loyalty to this destination (Huete-Alcocer and Hernandez-Rojas, 2022). Furthermore, tourists' food experience (sensory, service and environmental) positively influence their satisfaction and

subjective well-being, whereas satisfaction play a chain mediating role in the effect of experience on tourists' subjective well-being (Yang et al., 2024b).

7.12 Data and methodology

The survey was conducted at the International Airport of Chania in Crete, Greece, through a well-structured questionnaire and face-to-face interviews when necessary, during the touristic period August-October 2023. Crete is considered to be the most popular touristic island in Greece since 21% of the total foreign arrivals who visited Greece in the year 2023 selected Crete to spend their vacations. A record number of tourist arrivals was recorded in 2023 in Crete, reaching 5 million foreign arrivals, while at the airport of Chania, tourists' arrivals were more than 1.4 million, marking a 9% increase compared to the previous year's period (Fraport, Greece, 2024).

The questionnaire was developed based on a thorough review of the literature on food tourism in order to better explore the drivers that influence behavioral intentions (Apak and Gurmuz, 2023; Birch and Memery, 2020; Chang and Mak, 2018; Choe and Kim, 2019; Choe and Kim, 2018; Hsu et al., 2022; Madaleno et al., 2017; Meng et al., 2016; Mora et al., 2021; Rodríguez-Gutiérrez et al., 2020; Sung et al., 2016; Vesci and Botti, 2019; Zhang et al., 2018). The questionnaire was translated into five languages: English, German, French, Italian and Polish, and communicated to tourists by the survey representative through brochures, roll-ups and posters while they were waiting at the exit gates of the airport, having fulfilled their vacations. In the context of the structural changes that the pandemic brought about, the touristic survey at Chania Airport was transformed into a COVID-19 safe survey. An automated system of voluntary participation of foreigners was fully utilized from tourists by using their personal devices (PC, Smartphone and Tablet) after visually scanning an appropriate URL or QR Code activated in the language of the interested party's choice.

A total of 3,500 questionnaires were collected, but after careful initial screening in order to certify the quality of the data, incomplete questionnaires or those with conflicting or unlikely information were discarded. After the data cleaning exercise, a sample size of 2,682 complete cases were used in the Structural Equation Model.

The sample size was large enough to derive statistically significant and trustworthy outcomes and it was also representative, since it was proportionally constructed based on the different percentages of nationalities that visited the prefecture of Chania that were in line with the actual number of arrivals per nationality. Considering the total arrivals, the sample, although randomly collected, can be considered fairly representative of the island's tourists.

The questionnaire, in addition to the canonical questions on the socio-demographic characteristics of tourists, useful for understanding the respondents' profiles, included a series of questions aimed at capturing tourists' feelings, drivers and perceptions of their tourist experience.

In the section on tourists' perceptions, a set of questions from the literature was used to capture the behavior of individuals. For this purpose, a 5-point Likert scale was used in order to give a scaled score to certain statements, of which 1 had the meaning of ‘strongly disagree’ and 5 had the meaning of ‘strongly agree’.

Visitors answered a total of 82 questions to explore the factors influencing their behavioral intentions (Appendices, Questionnaire B, Tourism Survey B).

The dimensions and the variables defining them were carefully chosen by conducting an extensive literature review, from which the questions most consistent with the object of investigation were extracted.

7.13 Results

7.13.1 Sociodemographic data analysis

Any rearrangements that occurred in 2021 in the profile of foreign tourists, during the coronavirus period, appear to have been restored in 2023.

The sample was representative of the real arrivals per nationality that preferred the airport of Chania in order to visit Crete. So, the majority of tourists were from Scandinavian countries (Sweden, Norway, Denmark, Finland) with 32%; Central & North Europe (mainly Germany, France, Belgium, The Netherlands and Austria) followed with 22%, UK/Ireland with 18%, Eastern Europe (mainly Poland) with 14%, the Mediterranean (mainly Italy, Cyprus and

Malta) with 7%, USA/Canada, Australia and New Zealand with 4% and other countries with 3%.

Compared to the previous Tourism Research A in Chapter 6, the percentage of Scandinavians was higher in 2023 by ten percentage units and close to normal pre-COVID levels, while the percentages of all other nationalities showed a decline except for the British, who recorded an increase by 8 percentage units, moving to first place in total arrivals at Chania airport.

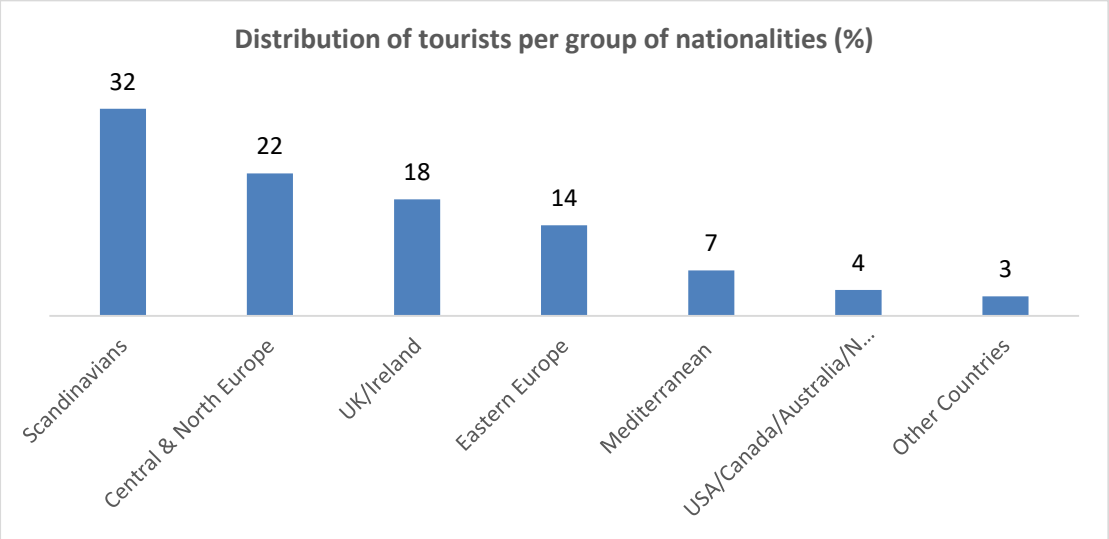


Figure 7.1 Distribution of tourists per group of nationalities
Source: Author's own work

The sample was equally distributed between men and women, since 49,4% were male and 48,4% female and a very small percentage preferred not to say. Six out of ten tourists were below 44 years old. More specifically, 27,6% were between 25-34 years old, 21,4% were between 35-44 years old and 10,5% were very young between 16-24 years old. Four out of ten tourists were above 45 years old. More specifically, 23,1% were between 45-54 years old, 13,5% were between 55-64 years old, 3,3% were 65-74 years old and just 0,4% were 75 years old and above.

The percentage of young people up to 34 years old was 38%, marking a decrease compared to the previous Tourism Survey A, by 20 percentage units, with a consequent increase in the percentage of older tourists aged 45 and over.

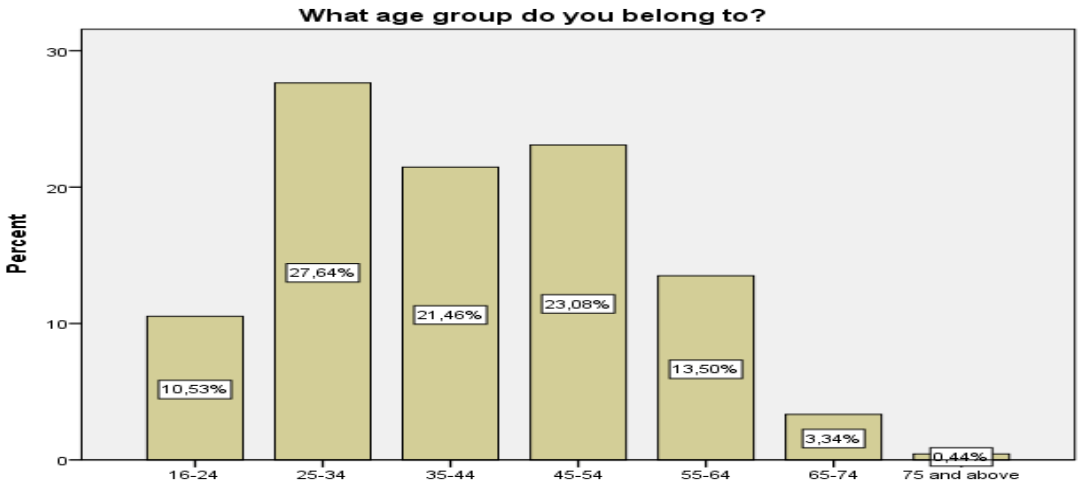


Figure 7.2 Age of tourists
Source: Author's own work

Their educational level was also very high, since 78% were graduates of tertiary education, having a bachelor or post-graduate degree. 17% had finished High School, 4,5% Secondary School and the percentage of tourists who had finished Primary School was just below 1%.

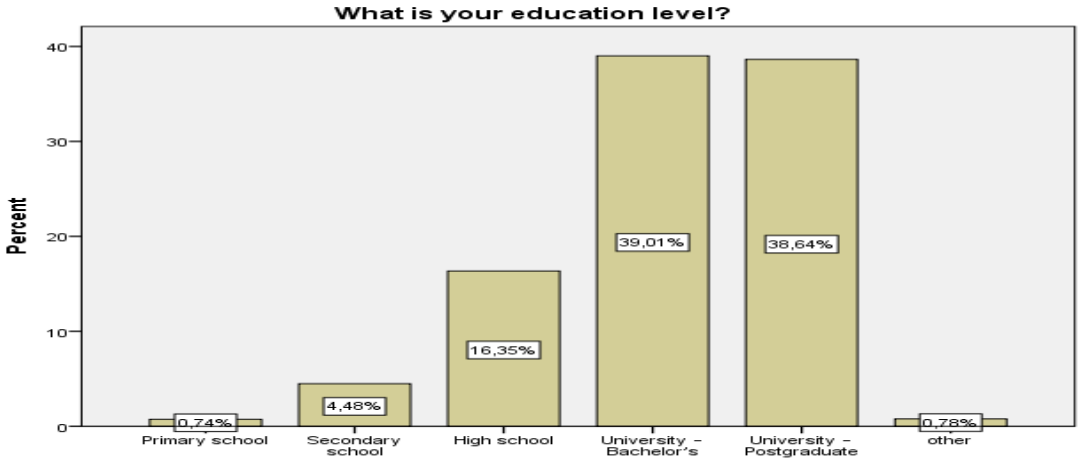


Figure 7.3 Education level of tourists
Source: Author's own work

The income level of the foreign tourists was at a high level, since their average net annual family income was nearly 80.000 euros. Almost one out of four tourists (26%) had declared quite a high net annual family income of more than 100.000 euros.

Compared to the previous Tourism Research A, there was an increase in the average net annual income of around 20.000 euros, mainly due to the increase of Scandinavians, the British and tourists from USA, Canada and Australia who have high income levels.

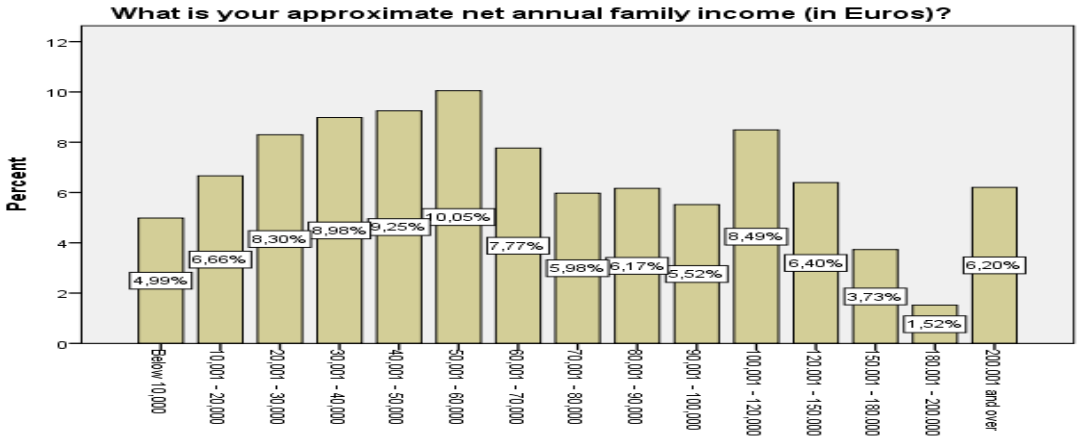


Figure 7.4 Net annual family income of tourists
Source: Author's own work

Almost two out of three tourists (68%) were working full-time and 5,8% part-time in the public or private sector. Moreover, 12% were self-employed, 8% were students and 5% were working part-time. 4% were retired, 1,15% were unemployed and 0,6% were housekeepers.

Compared to the previous survey, there was a significant decrease in students in 2023 by 13 percentage units and a high increase in salaried employees by 10 percentage units.

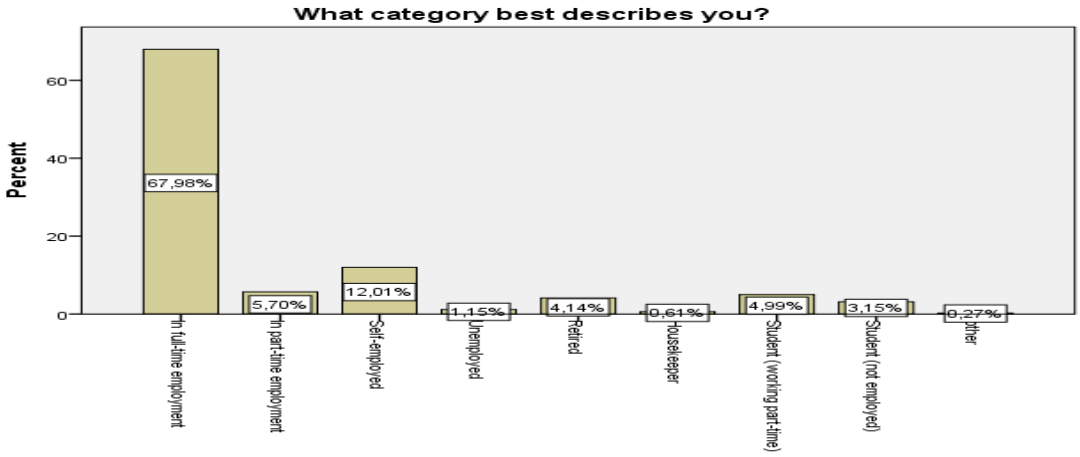


Figure 7.5 Employment of tourists
Source: Author's own work

Half of the visitors had already visited Crete before, which highlights how attractive the destination is. For those who had already visited Crete before, 78% of them had visited Crete before up to 5 times.

Compared to the previous Tourism Research A, there was a significant increase in tourists who had already visited Crete before in 2023, since in 2021 the percentage was 36%. This increase was mainly due to the return of Scandinavian tourists most of whom are repeaters.

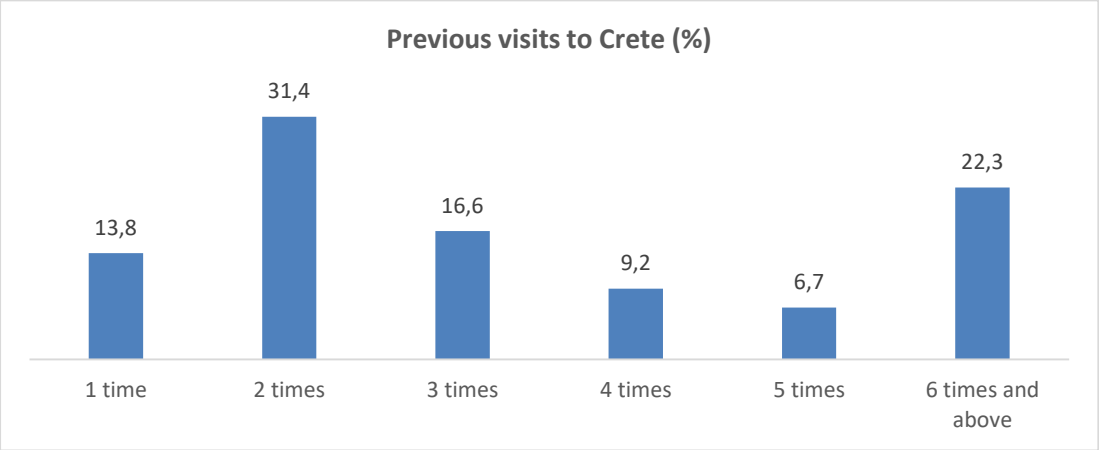


Figure 7.6 Previous visits to Crete
Source: Author's own work

Concerning their last visit, the majority (56%) stayed in Chania, 20% in Rethymnon, 17% in Heraklion and 7% in Lasithi. The fact that tourists stayed more in Chania was because they preferred to come to Crete through Chania airport and not through Heraklion airport.

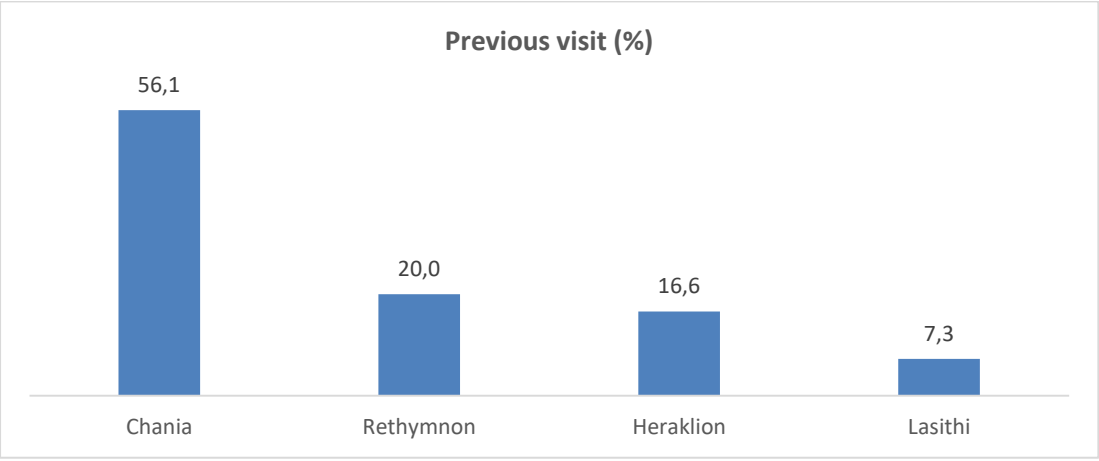


Figure 7.7 Previous visit
Source: Author's own work

Moreover, regarding tourists who had already visited Crete, 21% visited Crete very recently, just within the last 6 months, 22% within the last year and 11% within the last 2 years. 31% of the tourists had visited Crete within 5 to 10 years and 15% before 11 years and longer. It is evident that there was a high percentage of tourists (43%) who visited Crete in 2023 after the coronavirus period (from 2022); this occurred mainly due to the return of Scandinavians.

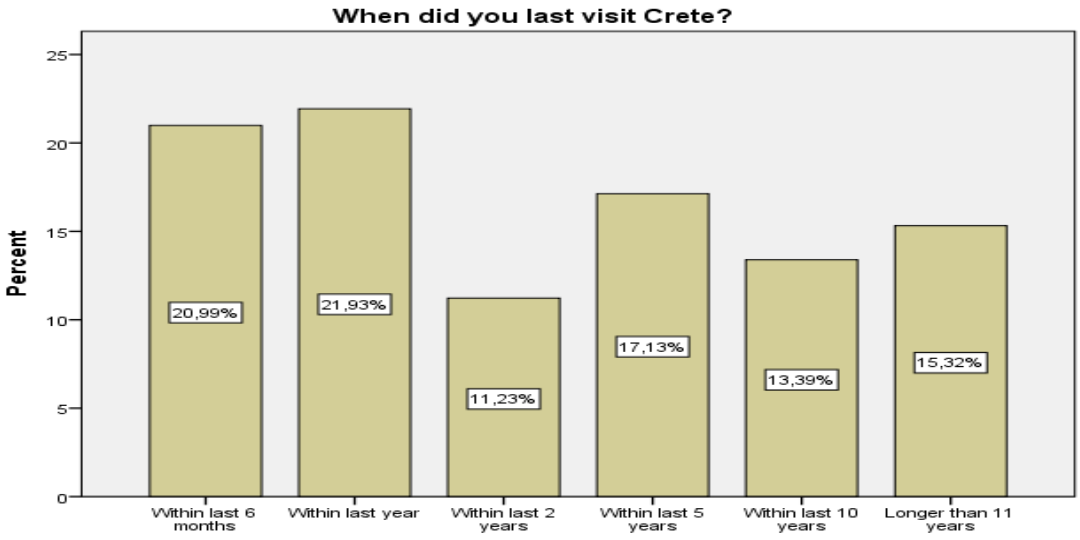


Figure 7.8 Last visit in Crete
Source: Author's own work

Half of the tourists were married, 28% were in a relationship and 23% were single. The main reason for the current visit of the tourists to Crete was for leisure and recreation (92%), since Crete is very popular for its beautiful beaches, especially in the Regional Unit of Chania such as Elafonisi, Falassarna and Balos.

The majority of tourists (54%) travelled to Crete with their partner, or husband/wife; 16% came with children, 13% with other family members or relatives and 12% with group of friends.

Compared to the previous Tourism Research A, in 2023 there was a decrease of tourists who were coming with children and an increase of tourists who preferred to travel with relatives and not with friends.

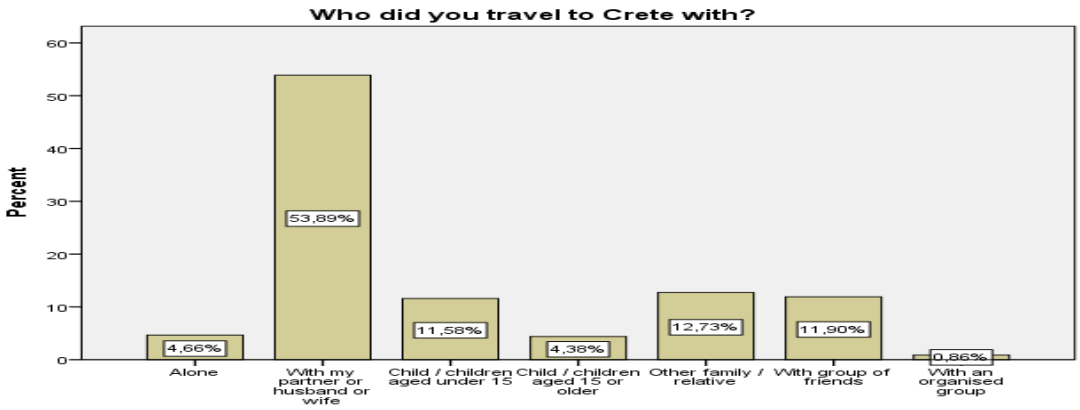


Figure 7.9 Travelling with accompanying persons
Source: Author's own work

The majority of tourists (57%) arranged their holidays alone, making all the necessary arrangements; 24% preferred a travel agency, 15% booked a package tour and 4% made part of the arrangements themselves and some via a travel agency.

It is clear that the way of arranging holidays has changed during the coronavirus period and that change remained after that period. More specifically, the majority of tourists make all the arrangements alone. Although the percentage of this category decreased by 9 percentage units in 2023 compared to the previous Tourism Research A, it was still high.

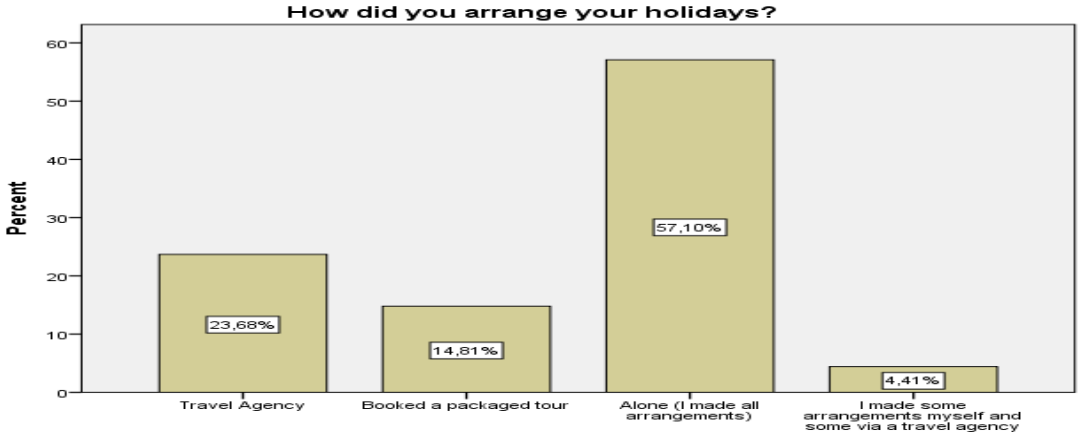


Figure 7.10 Travel arrangements
Source: Author's own work

The vast majority of tourists came to Crete though direct flights from their town. More specifically, 57% came to Crete through direct low-cost flights mainly by Ryanair, and 39% through direct non low cost flights (regular charters), while 4% also came not with a direct flight but with a domestic flight mainly through Athens/Thessaloniki.

Compared to the previous Research A, there was an increase of tourists who preferred to travel by low-cost flights in 2023. Due to Russia's military invasion of Ukraine in 2022, the prices of oil and generally the energy costs have drastically increased which has dragged the prices of raw materials upwards and generally the prices of most products and provided services. So, tourists also prefer to constrain their budget on flights by using low-cost flights.

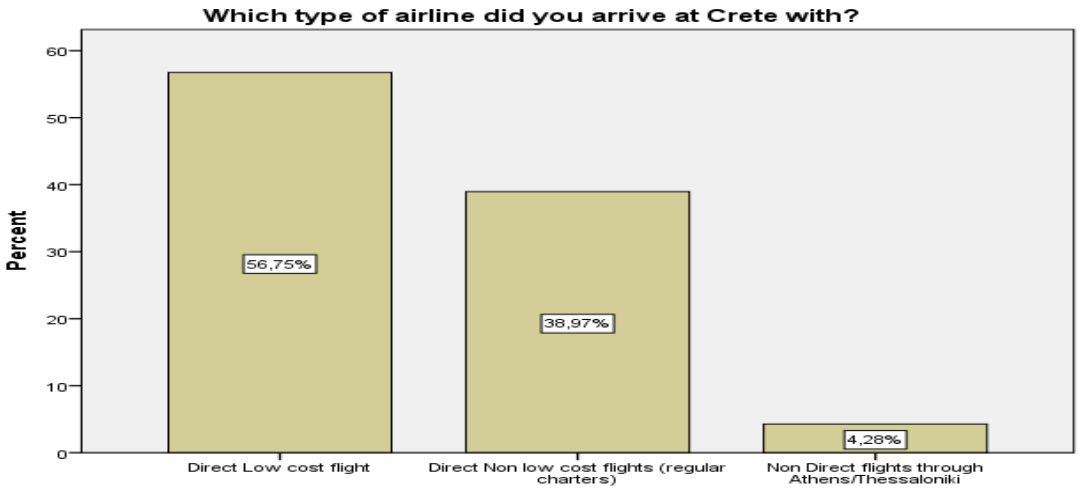


Figure 7.11 Type of airlines
Source: Author's own work

The majority of tourists, almost six out of ten (59%), stayed at hotel accommodation. 16% preferred to stay at an AirBnB or similar type of accommodation, 14% at a rented apartment or room, 6% in villas (not via AirBnB or similar types of providers), 2,7% with friends or at a family's house and 2% stayed at their own house, since a significant number of tourists have bought a house in Crete in the previous decades, outside of the town centres. The tourists who preferred to stay at camping sites, hostels and yachts were below 1%.

Compared to the previous Tourism Research A, there was a significant decrease in 2023 by 50% of tourists who preferred to stay in villas, due to the general price increases caused by Russia's invasion of Ukraine.

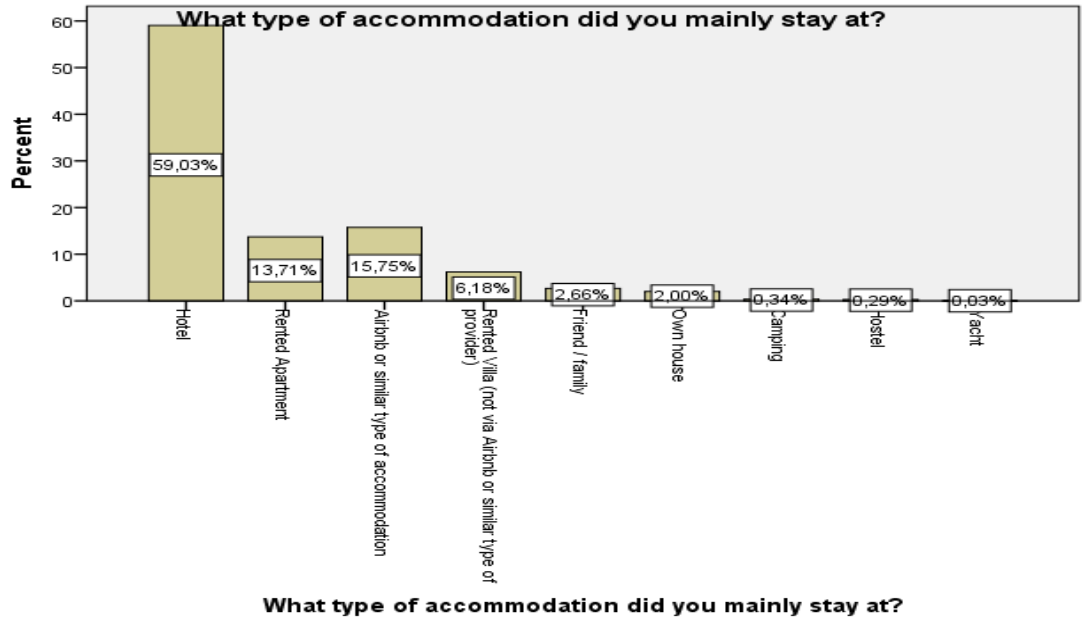


Figure 7.12 Type of accommodation
Source: Author's own work

Concerning those who stayed at a hotel, two out of three tourists preferred to stay at luxurious 4- and 5-star hotels. More specifically, 39% stayed at 4-star and 27% at 5-star hotels. Moreover, 27% stayed at 3-star hotels, 6% at 2-star hotels and only 0,5% at 1-star hotel.

Compared to the previous Tourism Research A, there was a decrease of tourists who preferred to stay in 4- and 5-star hotels in 2023, due to the general price increase caused by Russia's invasion of Ukraine. Those tourists moved to 3-star hotels.

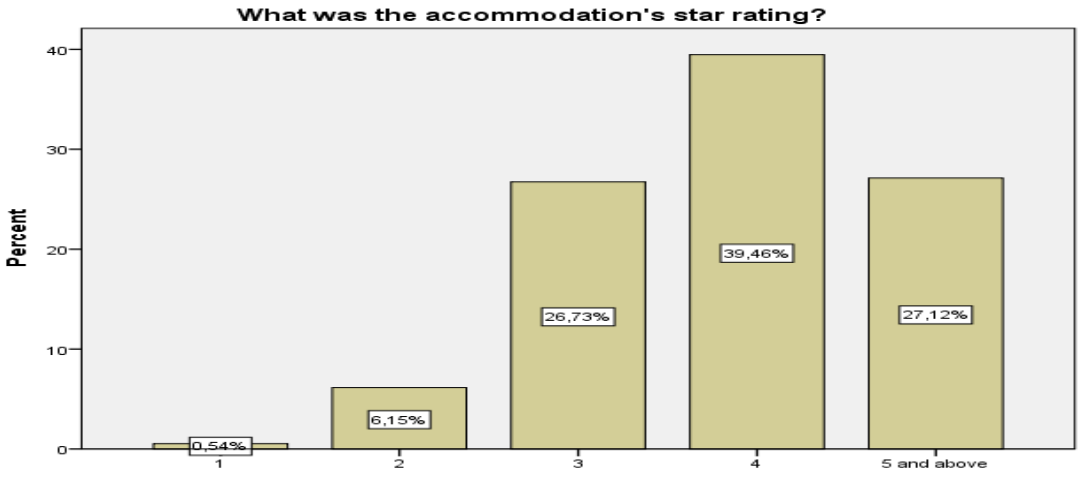


Figure 7.13 Type of accommodation per star category
Source: Author's own work

Furthermore, half the tourists (51%) who stayed at hotels did not have any food package; they selected the "room only" category. 22% preferred bed and breakfast, 12% half board and 15% the all-inclusive package (full board). There was a significant reduction of all-inclusive packages in 2023 compared to 2021 by 14 percentage units due to the fact that tourists, after the coronavirus constraints, preferred to visit restaurants outside of their hotels in order to have their lunch/dinner.

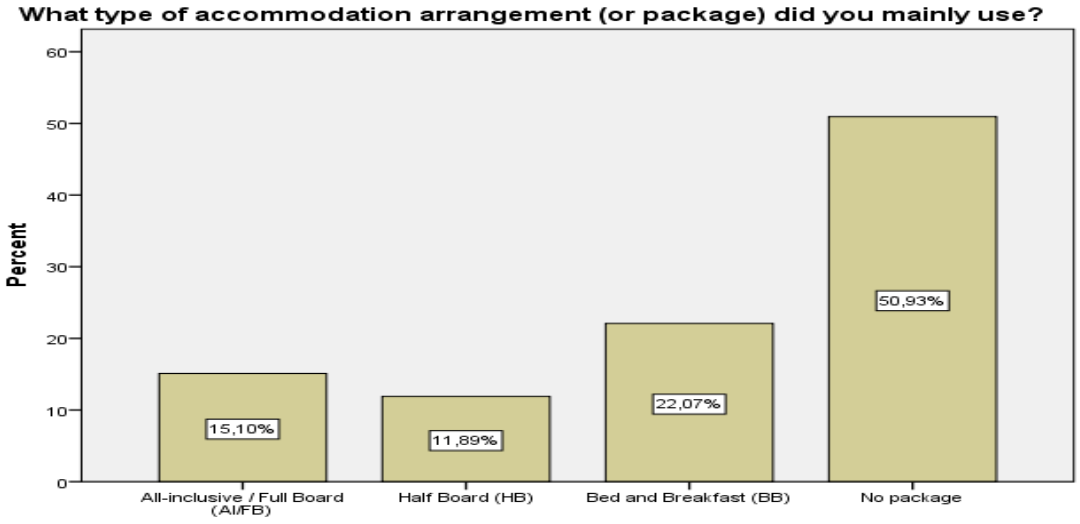


Figure 7.14 Food package at hotel accommodation
Source: Author's own work

Concerning the budget that foreign tourists spent during their vacations in Crete, the average amount was in the category of 751-1000 euros, excluding tickets and accommodation expenses, which was higher than the average budget spent in 2021. This is mainly explained due to the fact that more tourists came in 2023 from Scandinavian countries, UK, USA, Canada and Australia who were of higher income level, so they could spend more money during their holidays. Another explanation is that due to the high increase of prices, tourists spent more money in order to cover and satisfy the same level of services provided.

Moreover, 20% of tourists spent more than 1250 euros per group of visit during their vacations, which is explained due to the higher income level of tourists who came in 2023 compared to 2021.

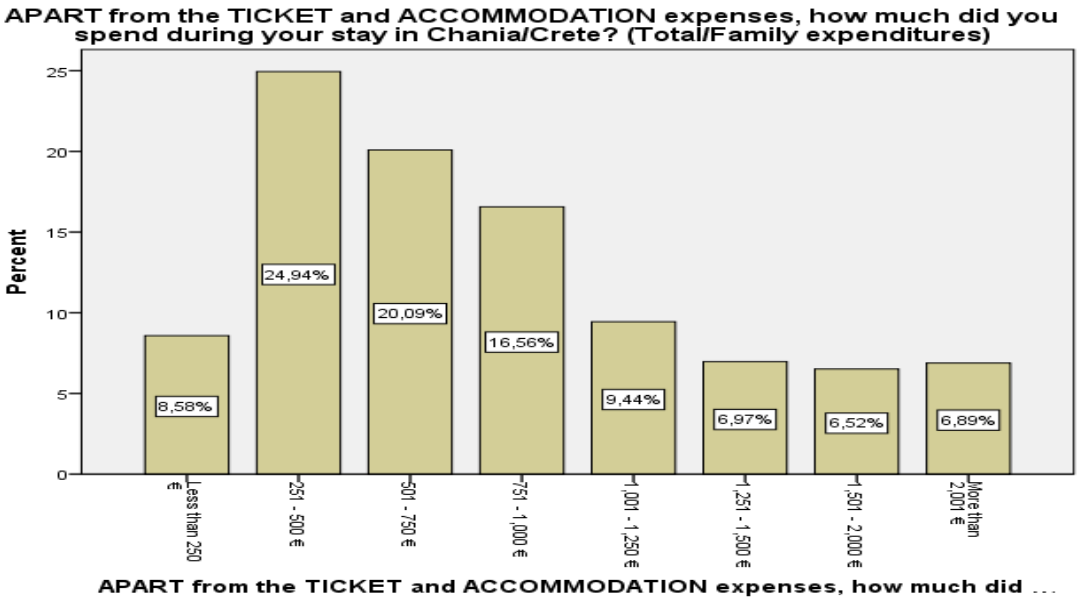


Figure 7.15 Budget spent during holidays
Source: Author's own work

7.13.2 Agricultural products analysis

Two out of three tourists stated that gastronomic experiences were important or very important when they choose a destination for their trip; on the contrary only 10% declared the totally opposite opinion, highlighting the high significance of gastronomic experiences in the selection of the final touristic destination.

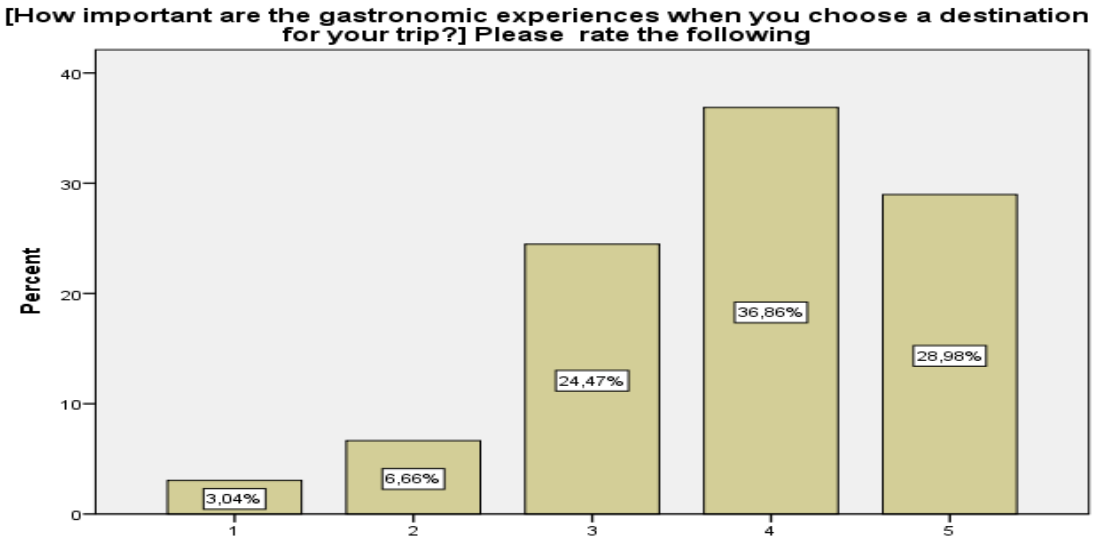


Figure 7.16 Importance of gastronomic experiences for selecting destination
Source: Author's own work

Moreover, almost eight out of 10 tourists stated that gastronomy was important or very important in the satisfaction of their trip; on the contrary only 4% declared the totally opposite view, highlighting the very high significance of gastronomy in the overall satisfaction of the trip.

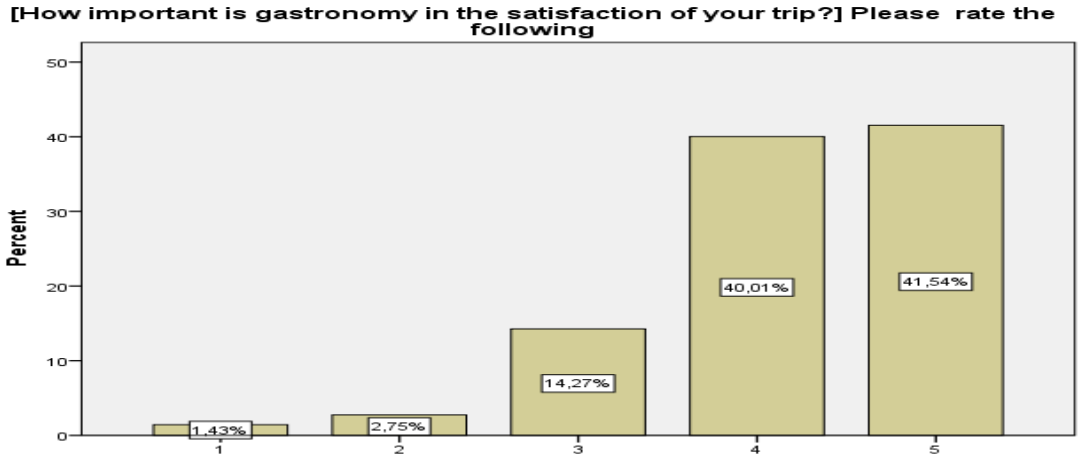


Figure 7.17 Importance of gastronomy in the satisfaction of the trip
Source: Author's own work

Furthermore, almost two out of three tourists (68%) stated that gastronomy was very important as a motivation to travel; on the contrary 10% expressed a totally different opinion, highlighting the high significance of local gastronomic characteristics on the motivation to travel in a specific touristic destination.

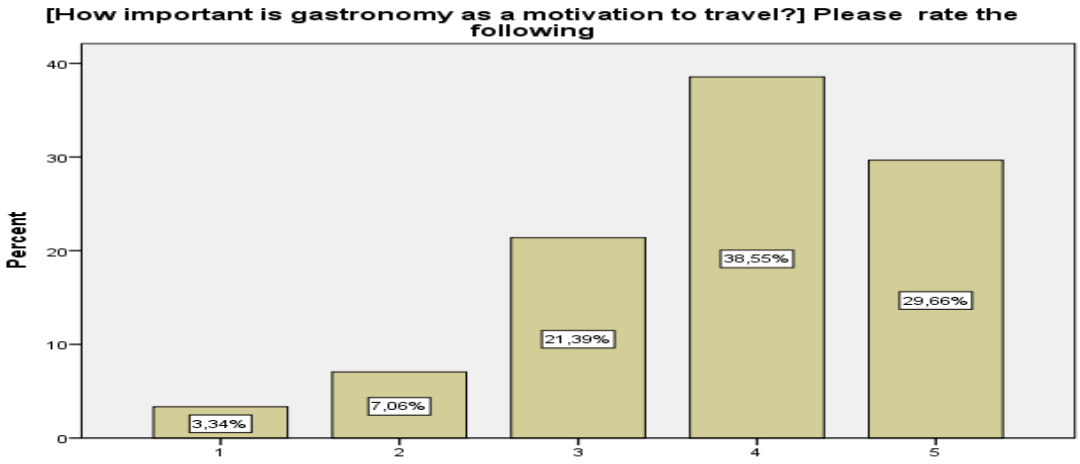


Figure 7.18 Importance of gastronomy as a motivation to travel
Source: Author's own work

Four out of ten (41%) tourists declared that their knowledge on Cretan gastronomy before their visit was at a good or very good level; on the contrary one out of four tourists had low or very low knowledge about Cretan gastronomy. This means that a significant percentage of tourists had already been informed about the popular Cretan agricultural products.

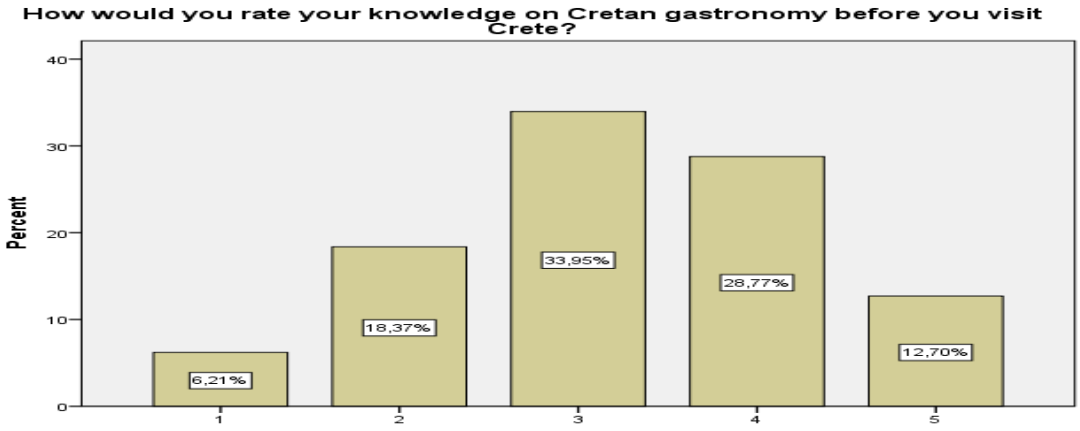


Figure 7.19 Knowledge on Cretan gastronomy before visiting Crete
Source: Author's own work

Close to 60% of the tourists stated that Cretan gastronomy influenced their visit to Crete much or very much; on the contrary only 16% expressed a totally different opinion, highlighting the high significance of Cretan gastronomy on the decision of tourists to choose Crete as a final destination for their holidays. This percentage is a little bit lower than in 2021, but still very high, and close to 60%.

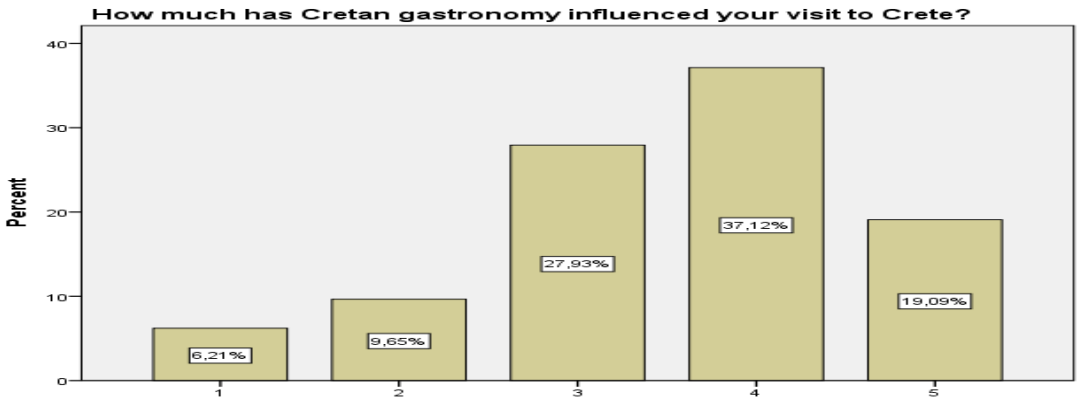


Figure 7.20 Influence of Cretan gastronomy to visit Crete
Source: Author's own work

The average rate of tourists' interest in Cretan gastronomy was calculated at 7,1 out of ten, with almost one out of four tourists having a very high interest in Cretan gastronomy, declaring a rate from 9 to 10.

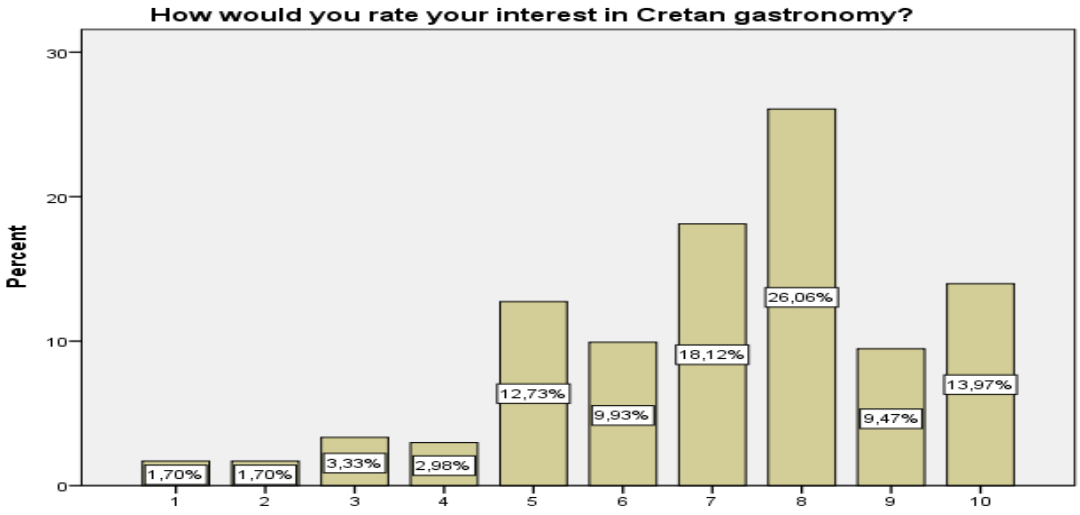


Figure 7.21 Interest in Cretan gastronomy
Source: Author's own work

Almost half of the tourists' budget (53%) was spent on food during their holidays in Crete, a percentage which was very high, highlighting the significance of food tourism in Crete. Compared to the previous Tourism Research A, the percentage of the budget that had been spent on food was higher than in 2021.

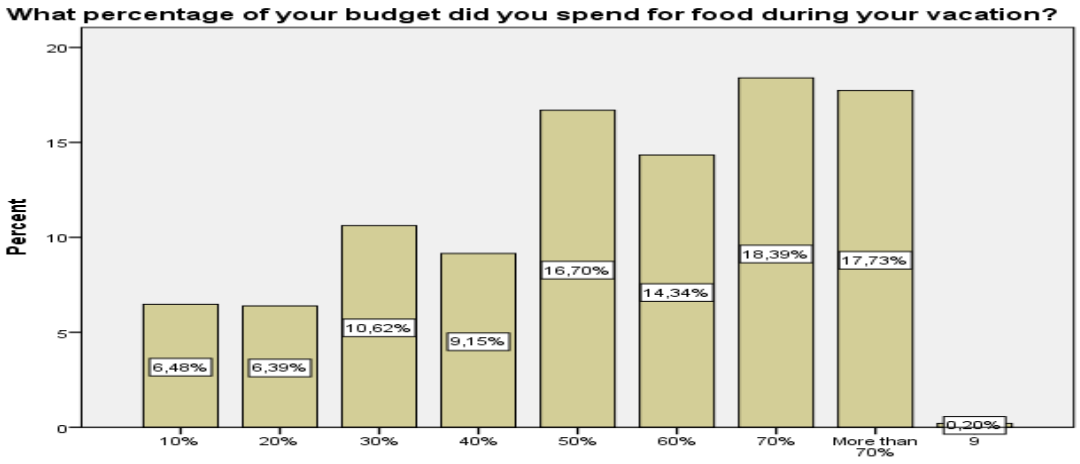


Figure 7.22 Budget spent during holidays
Source: Author's own work

Six out of ten tourists bought olive oil during their holidays in Crete, 55% bought local cheese (graviera, feta, mizithra etc) and almost half (49%) bought wine. Concerning the other local agricultural products, Cretan honey and vegetables were preferred by 44% of tourists, tsikoudia (local alcoholic drink) by 43% and fresh orange juice by 42%, while 38% of tourists bought local herbs & spices and almost three out of ten tourists (29%) purchased traditional rusk bread.

Compared to the previous Tourism Research, there was a higher percentage of tourists who bought all of the above local agricultural products in 2023, highlighting the satisfaction of the high quality Cretan local agricultural products.

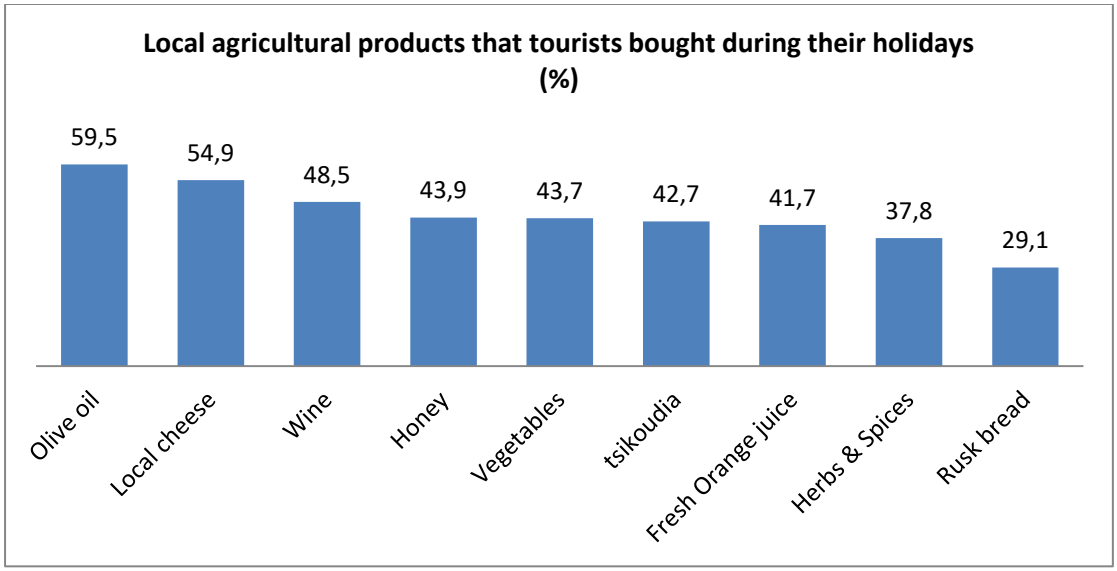


Figure 7.23 Local agricultural products that tourists bought during their holidays
Source: Author's own work

Regarding the participation of tourists in food activities, 10% of visitors participated in olive oil routes, 8,4% in wine routes, 8,1% in festivals/events, 4,2% in agrotourism and 1,8% in cooking seminars/courses.

Compared to the previous Tourism Research A, there was a higher involvement in all food activities from tourists in 2023, highlighting the high interest and satisfaction from the participation in local food activities.

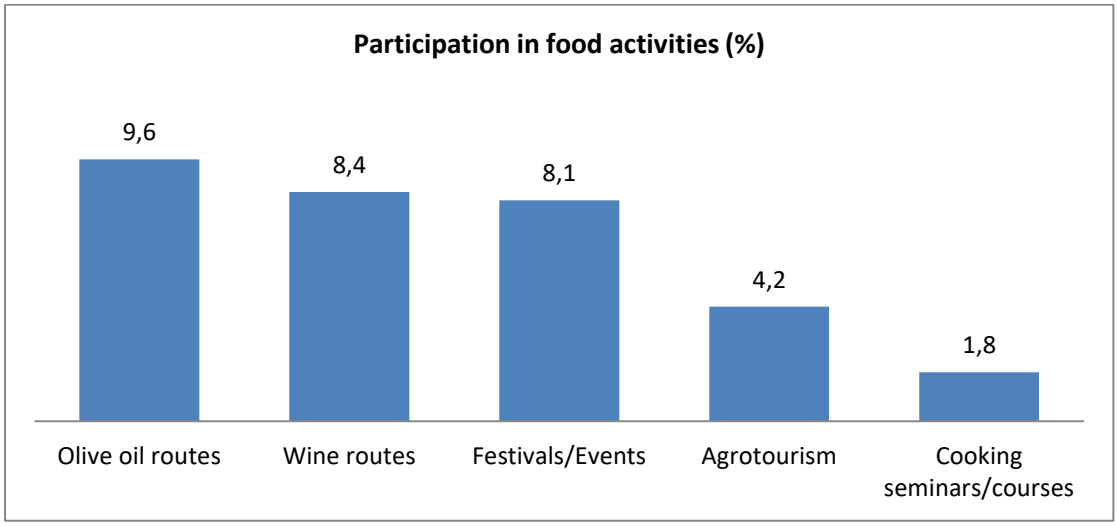


Figure 7.24 Participation in food activities
Source: Author's own work

Regarding Cretan agricultural products, although the majority of tourists said that they could find them at their hotels, there was a very high percentage of 31% that declared that those products were not available at their hotel accommodation. This percentage was lower than found in the previous Tourism Research A by 6 percentage units, depicting that more touristic accommodations are trying to provide the authentic high quality local agricultural products in their accommodations rather than products from other towns or countries.



Figure 7.25 Availability of Cretan local agricultural products at hotel accommodation
Source: Author's own work

The majority of tourists, just over three out of four (77%), consumed local agricultural products at restaurants/tavernas, 15% at hotel restaurants, 6% at special Cretan food places and 1,6% at farms or street markets.

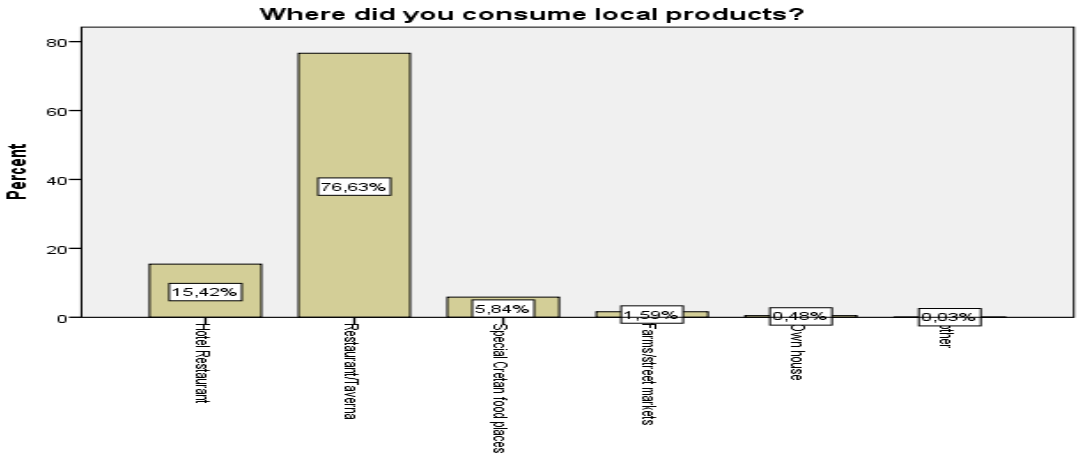


Figure 7.26 Place of consumption of local agricultural products
Source: Author's own work

Concerning the characteristics of the Cretan agricultural local products, the vast majority of tourists expressed their satisfaction about the different characteristics. More specifically, 88% of tourists declared that they were much or very much satisfied with the taste of local agricultural products, with 55% of tourists stating their absolute satisfaction about the taste of Cretan agricultural products.



Figure 7.27 Satisfaction with taste of local agricultural products
Source: Author's own work

The same high percentage was declared by tourists as well regarding the quality of the local agricultural products, since 88% of tourists declared that they were much or very much satisfied with the quality of local agricultural products, with half the tourists stating their absolute satisfaction about the quality of Cretan agricultural products.

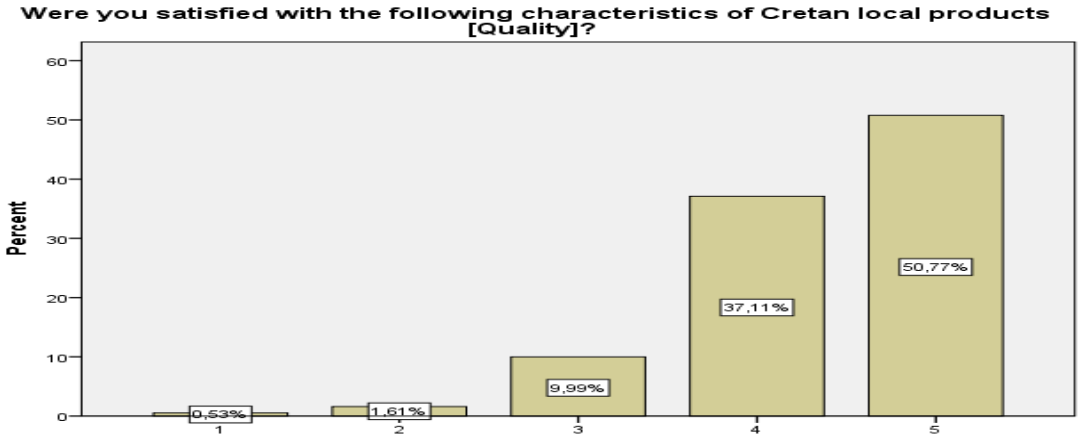


Figure 7.28 Satisfaction with quality of local agricultural products
Source: Author's own work

Almost the same high percentage was also declared by 87% of tourists who declared that they were much or very much satisfied with the freshness of local agricultural products with half the tourists stating their absolute satisfaction about the freshness of Cretan agricultural products.

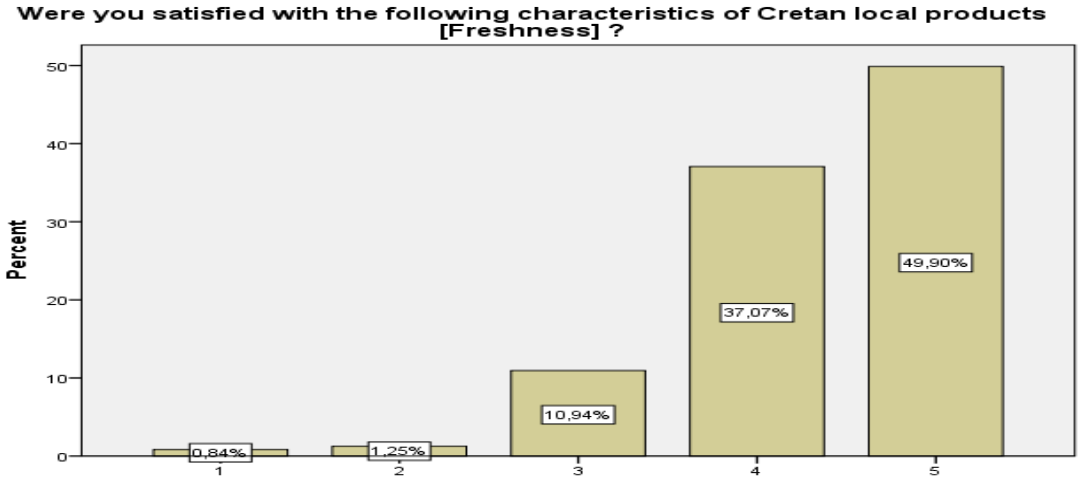


Figure 7.29 Satisfaction with freshness of local agricultural products
Source: Author's own work

Concerning the appearance of the local agricultural products, a high percentage of 84% of tourists also declared that they were much or very much satisfied with the appearance of local agricultural products.

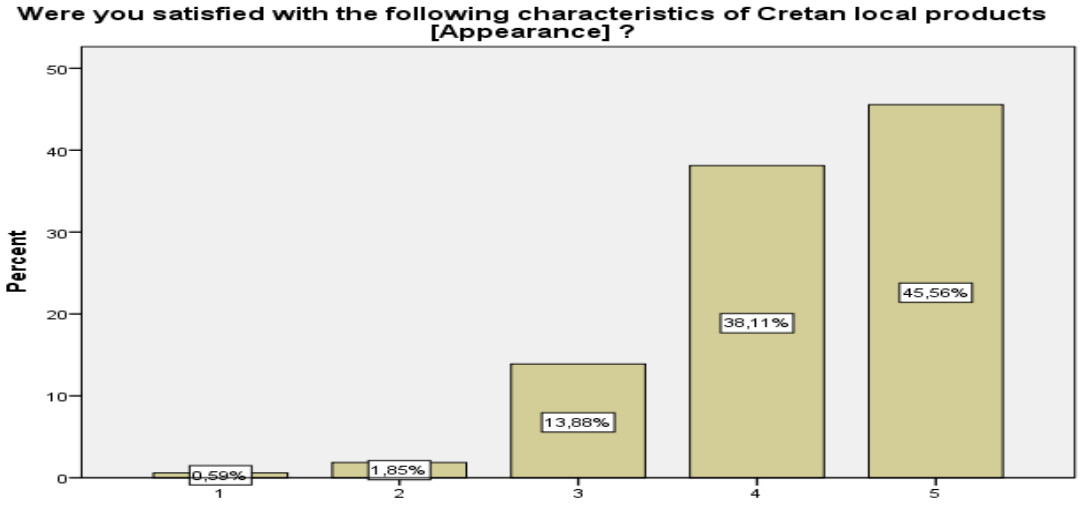


Figure 7.30 Satisfaction with appearance of local agricultural products
Source: Author's own work

On the contrary, concerning the varieties of the local agricultural products, the satisfaction was not so high compared with the previous characteristics; since 72% of tourists declared that they were much or very much satisfied with the varieties of local agricultural products.

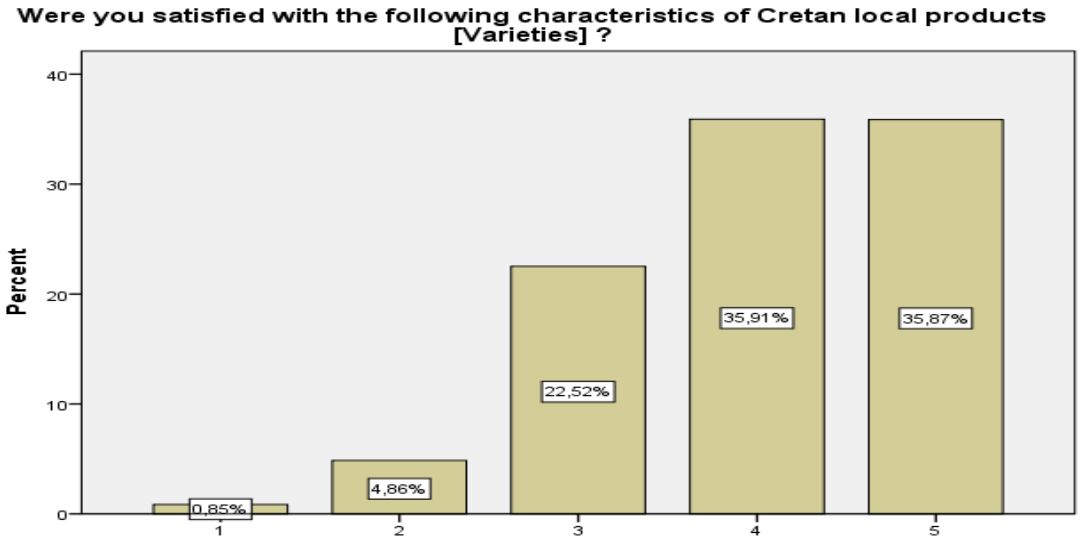


Figure 7.31 Satisfaction with varieties of local agricultural products
Source: Author's own work

The same percentage of satisfaction (71%) was declared as well from tourists regarding the price of local agricultural products.

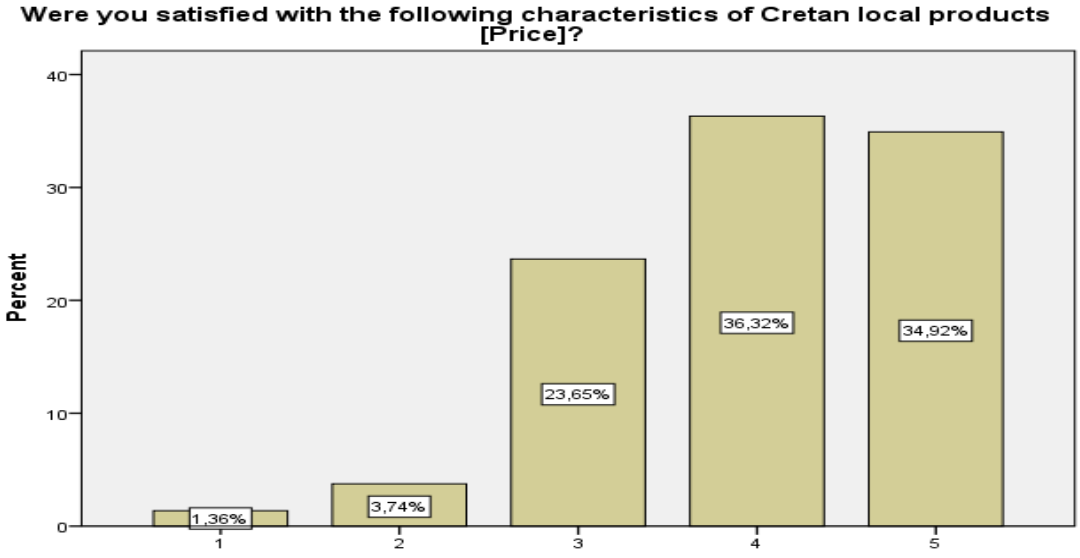


Figure 7.32 Satisfaction with price of local agricultural products
Source: Author's own work

The vast majority of tourists, specifically nine out of ten tourists, expressed the opinion that food experiences in Crete met their expectations which was higher than the percentage in 2021, also highlighting the higher satisfaction with the local agricultural products.

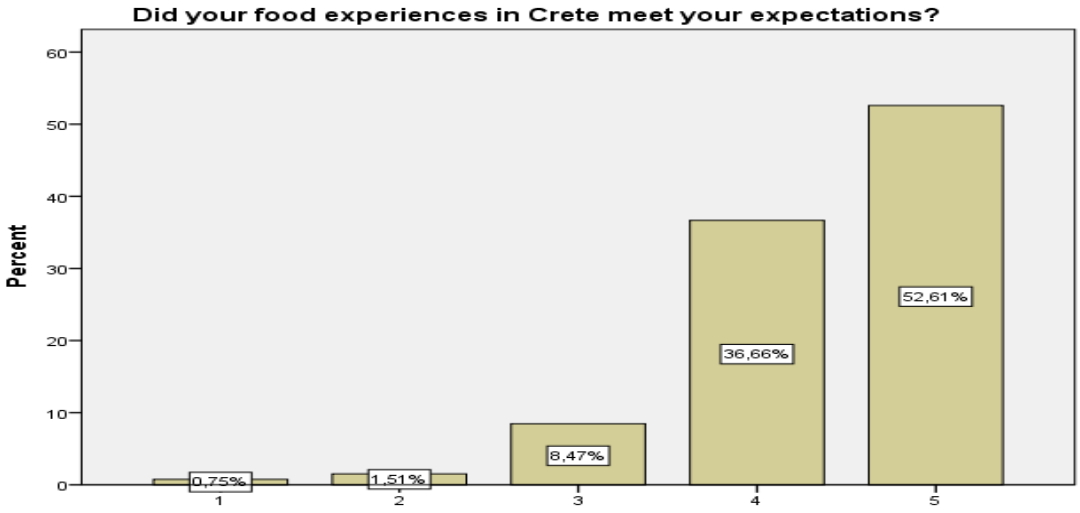


Figure 7.33 Food experiences and meet of expectations
Source: Author's own work

7.13.3 Structural Equation Model analysis

The types of statements and response modes were harmonized to be able to perform a statistical analysis using the Structural Equation Model (SEM). This model fits well with the possibility of capturing behavior from observed variables by estimating latent effects. SEM offers a solution to the problem of measuring variables that cannot be directly observed (such as perceptions and attitudes) and that of identifying causal links between variables (Hair et al., 2021). In fact, the use of SEM models in the literature is widely established when one wants to identify aspects of individuals' behavior or opinion, especially in food tourism studies (Angelakis et al., 2023). The literature has extensively discussed the minimum sample size (Hair et al., 2021). Practice has shown that the size depends both on the reference universe and the complexity of the model put into practice. To compare a specific structure between different groups, one must first identify the structural differences between the groups and then choose the appropriate SEM technique. All associated parameters must be measured with the same value in a specific structure. Generally, 5- or 7-grade Likert scales are used in order to get the midpoint.

To evaluate the SEM approach, one must estimate the goodness of fit of the model based on the p-value and also estimate the root mean square error of approximation (RMSEA), which takes into account the approximation error of a population and how well the model would fit the population covariance matrix. Values of RMSEA below 0.05 can be considered acceptable, and between 0.05 and 0.1 average as acceptable; above 0.1, the model must be rejected.

In this work, SEM approach was used in order to construct an extended and modified version of the well-known Theory of Planned Behavior, starting from the previous research in 2021 (Tourism Survey A), and adding new aspects from the inspiring theoretical models of Apak and Gurmuz, 2023; Birch and Memery, 2020; Chang and Mak, 2018; Choe and Kim, 2019; Choe and Kim, 2018; Hsu et al., 2022; Madaleno et al., 2017; Meng et al., 2016; Mora et al., 2021; Rodríguez-Gutiérrez et al., 2020; Sung et al., 2016; Vesci and Botti, 2019; Zhang et al., 2018. Thus, we came up with the following scheme in the following Figure 7.34, with the following assumptions:

H1. Taste quality value is positively related to tourists' attitude towards local food
H2. Health value is positively related to tourists' attitude towards local food
H3. Price value is positively related to tourists' attitude towards local food
H4. Emotional value is positively related to tourists' attitude towards local food
H5. Prestige value is positively related to tourists' attitude towards local food
H6. Interaction value is positively related to tourists' attitude towards local food
H7. Epistemic value is positively related to tourists' attitude towards local food
H8. Sustainability dimensions are positively related to tourists' satisfaction
H9. Authenticity and trust are positively related to tourists' satisfaction
H10. Marketing and distribution are positively related to tourists' satisfaction
H11. Food neophilia is positively related to tourists' satisfaction
H12. Food neophilia is positively related to tourists' behavioral intentions
H13. Food involvement is positively related to tourists' satisfaction
H14. Food involvement is positively related to tourists' behavioral intentions
H15. Satisfaction is positively related to tourists' behavioral intentions
H16. Attitude is positively related to food destination image
H17. Satisfaction is positively related to food destination image
H18. Food destination image is positively related to tourists' behavioral intentions
H19. Attitude is positively related to tourists' behavioral intentions
H20. Subjective norms are positively related to tourists' behavioral intentions
H21. Perceived behavior control is positively related to tourists' behavioral intentions

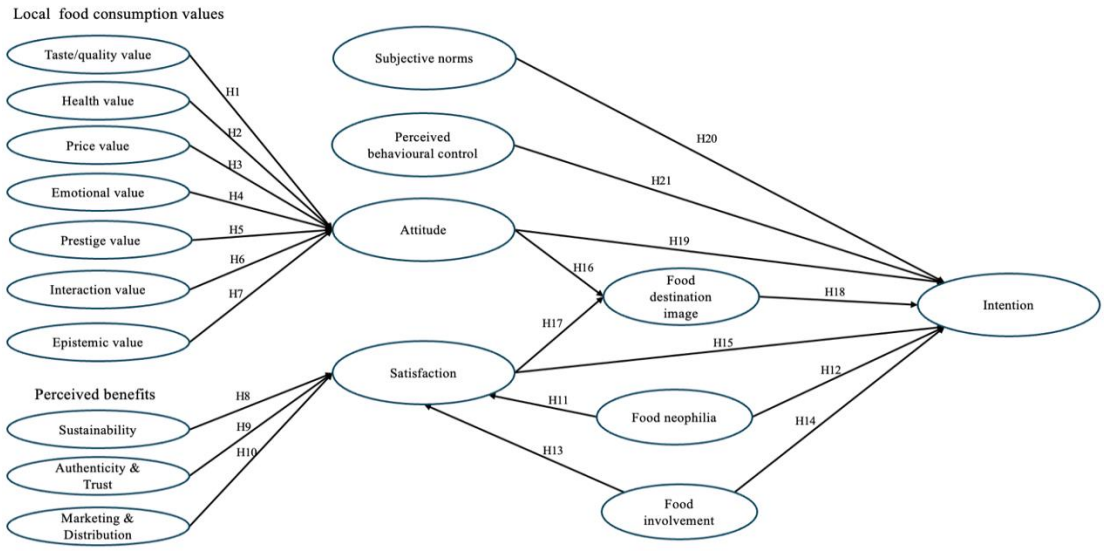


Figure 7.34 Extended TPB of this study
Source: Author's own work

For hypothesis testing, we used SEM. The fit of the model was tested using certain fit indices such as Chi-square and root mean square error of approximation (RMSEA) (Hooper et al., 2008). The RMSEA is 0.074 and the Chi-square statistical value of 49983.313 (p-value<0.001) indicates the robustness of the model's results (Browne & Cudeck, 1993). The strength of the relationship between a dependent and an independent variable is measured by the regression coefficient, which can be positive or negative, and it indicates the effect that a unit increase in the independent variable has on the dependent variable.

Table 7.1 SEM Analysis Results

		Coefficient	Standard error	z	P>|z|	95% conf. interval	
Attitude	Emotional value	.1220615	.0204089	5.98	0.000	.0820607	.1620626
	Taste quality	.4186546	.0280994	14.90	0.000	.3635807	.4737285
	Epistemic value	.1266252	.0184229	6.87	0.000	.090517	.1627334
	Health value	.1219668	.0220143	5.54	0.000	.0788196	.165114
	Prestige value	-.1662787	.0182322	-9.12	0.000	-.2020132	-.1305442
	Price value	.116352	.0169309	6.87	0.000	.0831682	.149559
	Interaction value	.1249964	.0248277	5.03	0.000	.1187953	.164539
Intention	Attitude	.1235338	.0211078	5.85	0.000	.0821633	.1649044
	Food Destination image	.3648783	.032944	11.09	0.000	.3003868	.4293697
	Satisfaction	.4102972	.0365954	11.21	0.000	.3385716	.4820228
	Subjective norms	.0672804	.010771	6.25	0.000	.0461696	.0883912
	Perceived Behavioural control	-.0662409	.016975	-3.90	0.000	-.0995113	-.0329706
	Food neophilia	.0634345	.0154561	4.10	0.000	.0331411	.0937279
	Food involvement	.1414471	0.116695	12.14	0.000	.1187953	.164539
Satisfaction	Sustainability	.3171968	.0326296	9.72	0.000	.2532439	.3811497
	Food neophilia	.2095058	.0177485	11.80	0.000	.1747195	.2442922
	Food involvement	-.0607997	.0133685	-4.55	0.000	-.0870015	-.034598
	Marketing distribution	-106841	.0187949	5.68	0.000	.0700036	.1436783
	Authenticity and trust	.3687918	.0281814	13.09	0.000	.3135573	.4240264
Food Destination Image	Satisfaction	.7923855	.0239614	33.07	0.000	.7454221	.8393489
	Attitude	.1136739	.021001	5.41	0.000	.0725128	.154835

Source: Author's own work

The results reported in Table 7.1 show that all the hypotheses underlying the model proved to be significant with a p-value < 0.001. Concerning the local food consumption values, all of them were found to have a positive and significant influence on visitors' attitude towards local food, apart from the prestige value which was found to have a negative and significant effect on attitude (β=-0,16). Prestige value also received the lowest mean score from tourists (grand mean=2.89). The lowest mean score of prestige value was also observed in the research of Choe and Kim (2019). In the study of Choe and Kim (2018), prestige value was also found with a negative value but the effect on the attitude of local food was not statistically important. In contrast, the "taste/quality value" was found to be the most influential dimension (β=0,42), also achieving the highest mean score from tourists (grand mean=4.14). The other local food consumption values, namely emotional, epistemic, health, interaction and price values, were having almost the same importance on attitude towards local food (β=0,12). On the contrary, in the research of Choe and Kim (2018), the health, price and interaction values were not found to be significant on attitude towards local food products.

In turn, attitude has a positive influence directly on intentions (β=0,12) to recommend local food, to find them in their countries, pay more and revisit Crete, and indirectly through food destination image (β=0,11) which is line with the study of Choe and Kim (2018). Applying the Theory of Planned Behavior, attitude was found to be the most important factor that positively affects the intentions, followed by the subjective norms (β=0,07). On the contrary, the perceived behavior control was found to have a negative influence on tourists' intentions (β=-0.07). Those findings are in contrast with other studies that have found a positive influence of all three dimensions on intentions (Quintal et al., 2015; Vesci and Botti, 2019; Zhang et al., 2018). Using an augmented Theory of Planned Behavior Model, satisfaction was also involved in the model to better understand the factors that influence tourists' intentions. Satisfaction was statistically significant, and positively influenced by perceived benefits, authenticity and trust, food neophilia, but negatively with food involvement (β=-0.06) and marketing and distribution (β=-0.11). Authenticity and trust (β=0.36) together with sustainability (β=0.31) were found to be the most important factors that affect satisfaction. On the other hand, food involvement (β=0.14) and food neophilia (β=0.06) were statistically significant and positively influence tourists' intentions directly. Satisfaction was found to

have a statistically significant positive effect directly on tourists' intentions (β=0.41). Comparing the dimensions of the Augmented Theory of Planned Behavior, satisfaction was found to be the most important dimension in positively and significantly influencing the intention to recommend local food, to find them in their countries, to pay more and to revisit Crete. These findings are in line with previous studies (Angelakis et al., 2023; Sung et al., 2016). Food destination image also influences intentions (β=0.36) to a high degree more than the direct effect of attitude on intentions, which is in line with the research of Choe and Kim (2018). The most influential variable on food destination image appears to be 'satisfaction', with an estimated coefficient of 0.79.

The Structural Equation Model is depicted together with the coefficients.

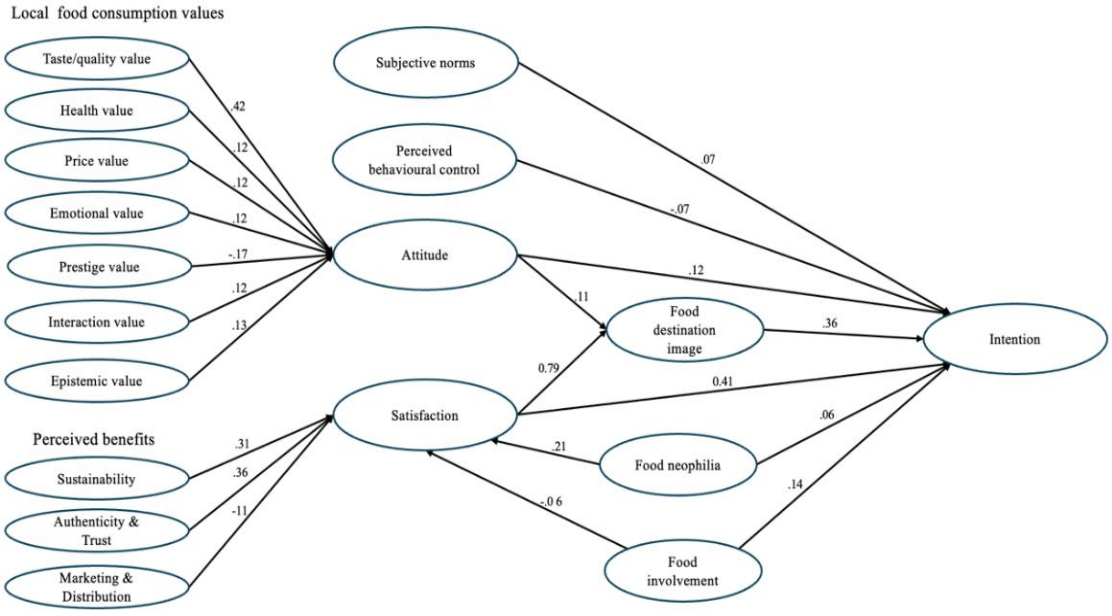


Figure 7.35 Results of SEM analysis of the extended TPB
Source: Author's own work

In order to assess internal consistency, Cronbach's alpha was utilized due to the existence of notable correlations. The index represents the degree of reliability of a test, indicating the extent to which a set of items is interconnected as a whole. A high value of this index does not guarantee that a scale is unidimensional. The function of the standardized Cronbach's alpha is:

$$\alpha = \frac{N \cdot \bar{c}}{\bar{v} + (N+1) \cdot \bar{c}}$$

In this function, N represents the number of items, c is the average inter-item covariance between the items, and v is the average variance. This test shows a good result for our groups: from a minimum of 0.73 to a maximum of 0.96, as shown below. This result confirms the internal consistency between variables; thus, it is possible to justify the use of this set of variables to generate latent ones in SEM analysis.

Table 7.2 Internal consistency

Dimension	Cronbach's Alpha
Emotional value	0.88
Taste quality	0.90
Epistemic value	0.81
Health value	0.73
Prestige value	0.84
Price value	0.89
Interaction value	0.79
Food destination image	0.91
Attitude	0.96
Subjective norms	0.89
Perceived behavioural control	0.82
Intention	0.82
Satisfaction	0.91
Food neophilia	0.77
Food involvement	0.81
Marketing distribution	0.88
Authenticity and trust	0.86
Sustainability	0.92

Source: Author's own work

7.14 Discussion

There was a significant increase of Scandinavians and British tourists at the airport of Chania in 2023 compared to 2021 due to the fact that in the post-COVID-19 period, there were no serious travel restrictions imposed for health reasons. The majority of tourists were 25-54 years old, with more arrivals of tourists aged 35 years old and above, because there was less possibility of being affected by coronavirus. There were more private and public employees and less students than 2021. The annual average family net income was very high, very close to 80.000 euros, higher than that of 2021, mainly due to the return of Scandinavians and the increase of British, Canadian, American and Australian tourists, who are of a higher income level.

They spent on average around 825-875 euros per visit of group during their vacations, excluding the expenses for air tickets and accommodation, which was higher than 2021, due to the higher income level of the tourists. Half the tourists had visited Crete before, mainly a higher percentage than 2021 because of the significant increase of Scandinavians who are repeaters. Most of them chose to come to Crete directly from their home town, mainly through low-cost flights due to the general increase of prices after the invasion of Ukraine by Russia which prevented a significant number of tourists to travel through the more expensive non low-cost regular charters. The majority of tourists stayed at luxurious hotel accommodations but at a decreased percentage. A significant decrease by one third of tourists was recorded in the rented villas due to the general increase of prices. Although there is a decrease in the percentage of tourists who make their travel arrangements alone, it is still high and preferred by more than half of tourists.

According to the World Food Travel Association (2023), food tourism is finally considered as a mainstream travel experience since food has become a main motivation factor for travelers when choosing a destination and with a great interest in food, while spending more time and money on unique experiences for food and beverages. The group of travelers known as food tourists, who are seeking to taste local food products and take part in related food activities while traveling, is increasing substantially in the last years, contributing to the sustainable development of a touristic destination.

This holds true in Crete as well, since two out of three tourists stated that the gastronomic experiences were important or very important when they choose a destination for their trip: almost eight out of ten tourists stated that gastronomy was important and very important in the satisfaction of their trip, while two out of three tourists stated that gastronomy was very important as a motivation to travel. Moreover, four out of ten tourists declared that their knowledge on Cretan gastronomy before their visit was at a good and very good level, six out of ten tourists stated that Cretan gastronomy influenced their visit to Crete much and very much, the average rate of tourists' interest in Cretan gastronomy was calculated at seven on a scale out of ten, and almost half of the tourists' budget was spent on food during their holidays in Crete, buying more local agricultural products and participating in more food activities.

Furthermore, tourists had been much and very much satisfied by around 90% from the characteristics of the local agricultural products, mainly from the perspective of taste, quality, freshness and appearance, but they were less satisfied with prices and varieties. Three out of ten tourists stated that the local agricultural products were not available at their hotel accommodations, a percentage which is lower than that of 2021 which shows that the touristic accommodations are taking steps forward for the promotion of local agricultural products. Finally, nine out of ten tourists expressed their view that Cretan gastronomy met their expectations much and very much, highlighting the very high degree of their satisfaction.

Food tourism is a growing segment of the travel industry that attracts a wide range of travelers worldwide who are looking to experience authentic local food products, influencing tourists' behavioral intentions.

More specifically, based on the results of the research, food consumption value theory together with an augmented Theory of Planned Behavior Model were used, taking into account satisfaction and food destination image, in order to describe tourists' behavioral intentions to revisit and recommend the destination, intentions to find local food products in their countries and the willingness to pay more for such food products. Perceived benefits, food neophilia and food involvement were also examined. All the relationships among the

drivers of the model were found to be statistically significant, directly or indirectly affecting behavioral intentions.

It was found that satisfaction was the most influential factor on tourists' behavioral intentions and food destination image, though satisfaction was also a good predictor. Taste/quality value was the most significant factor concerning the food consumption values that positively influence tourists' attitudes towards local food. On the other hand, prestige value was the only one that negatively affected tourists' attitudes towards local food, which is not common in the majority of other studies. Although the value is very small, further research should consider whether prestige value should be reexamined as one of the values of consumption value theory or if it should be integrated together with interaction value as a social dimension. Regarding perceived benefits, there is a need to construct a new marketing plan and more convenient distribution channels. Food neophilia, food involvement, attitudes and subjective norms could positively affect tourists' behavioral intentions, apart from perceived behavior control, which was found to have a negative influence on intentions.

To the best of our knowledge, this research is the first application using the food consumption value theory and the extended theory of planned behavior in order to explain the effect on tourists' intentions in a direct or indirect way through the food destination image. More specifically, all the values of the model were found to be statistically significant with a p-value<0.001, which makes the model robust.

The outcomes of this research could be used as a guideline for relative stakeholders and decision-makers in order to better promote the place as a food tourism destination. Initiatives should be focused on enhancing the unique quality and the beneficial properties of local food attributes and food activities, connecting them with the culture and history of the place, emphasizing the health properties of the local food products and enhancing knowledge, by taking into account the emotional values of tourists, and providing them with experiential authentic and memorable experiences that will increase the degree of satisfaction and stimulate positive intentions to revisit and recommend the destination.

It should be noted that our sample has been taken based on the total number of tourists who preferred the airport of Chania in order to visit the island of Crete, focused mainly on Western Crete. Because the mixture of nationalities is different among tourists who prefer the

airport of Chania to those who prefer the airport of Heraklion, future research should also include tourists who landed at the airport of Heraklion in order to visit Crete, so as to have a more comprehensive picture of tourists who visit the Region of Crete.

Finally, like the previous research, only tourists were included in the current study. For a broader view, local stakeholders' network should be investigated as well in order to have a more holistic approach for the sustainable development of food tourism. The establishment of local network with an efficient coordination and mutual trust among the stakeholders could bring more benefits to the local society. Moreover, the active engagement of the local residents with tourism activities could contribute to the sustainable development of the destination by respecting the environment, encouraging local youth employment, tightening social relations, maintaining natural resources and promoting cultural heritage.

CHAPTER 8

REGIONAL STAKEHOLDERS' SURVEY

8.1 Introduction

In the previous researches, studies were made on the demand side, by examining tourists' behavior through local agricultural products in Crete. For a broader view, the supply side should be analyzed by examining the local stakeholders' view in order to have a more holistic approach for the sustainable development of food tourism in Crete.

A study was conducted during the period 2024-2025, focused on the production and consumption of local agricultural products, as well as their promotion, in the tourism sector and tourism development. A well-structured questionnaire was developed in order to contribute to the formation and completion of the decision-making tool by providing information on the various points through the SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) for Crete. Through the questionnaire and in order to facilitate the collective synthesis of the opinions of all stakeholders, a prioritization of the individual parameters has also been made, in order to determine individual needs and find ways to promote food tourism in the Region of Crete.

8.2 Data and methodology

The sample consisted of 155 fully completed questionnaires from different groups of stakeholders in Crete, activated in the agricultural and tourism sector, as well as with stakeholders from the public sector and Academic Institutes such as:

- Educational/Research Institutes (Universities, Observatories, Institutes)
- Local and Regional Public Authorities (Regional Unities, Municipalities, Chambers of Commerce, Economic Chambers, Federations of Small and Medium enterprises)
- Agricultural Unions, Associations, Cooperatives, Networks, Centres, Partnerships, Organisations, Enterprises

- Unions, Associations, Federations of Touristic Accommodations, Managers & Employees, Enterprises, Self-Employees

Almost four out of ten stakeholders were from the agricultural sector, three out of ten from the tourism sector, two out of ten from public authorities and one out of ten from educational and research Institutes. Moreover, the sample was equally distributed among Western and Eastern Crete.

For the analysis of the questionnaires concerning the SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, the Eisenhower matrix was used. The Eisenhower Matrix is an approach that supports decision-making, through 4 categories concerning the degree of urgency and importance: 1. Most urgent, most important; 2. Most urgent, less important; 3. Less urgent, more important; and 4. Less urgent, less important.

"Important" refers to the importance of each characteristic of local agricultural products. "Urgent" refers to how immediately a measure should be implemented to improve the situation of the local agricultural products.



Figure 8.1 Eisenhower matrix

A Google Form was prepared and stakeholders were asked to rank the points according to their importance and urgency using a Likert scale, whereby 1 was “least” and 5 was “most” urgent or important.

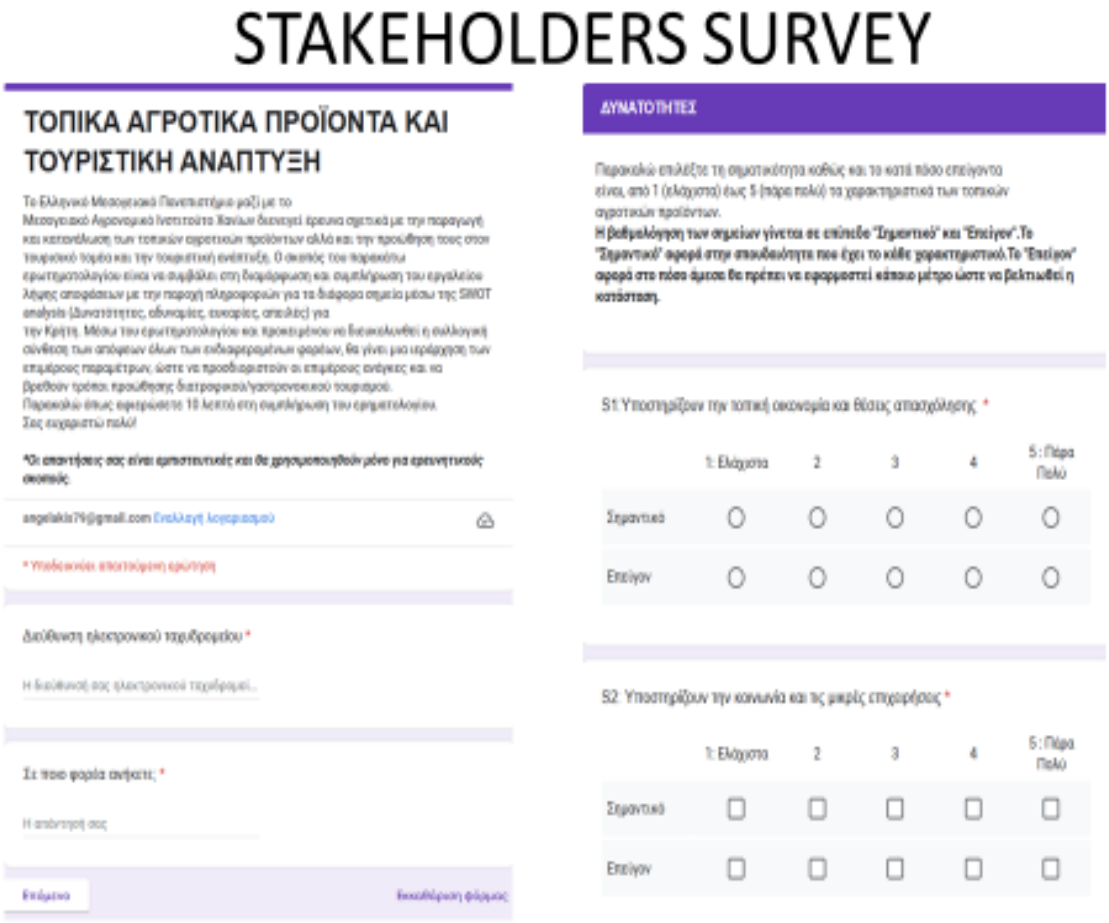


Figure 8.2 Stakeholders survey
Source: Author's own work

8.3 SWOT analysis

Concerning the results, it should be noted that some characteristics may be significant but not so urgent so as to take action, so the Eisenhower Matrix prioritizes each characteristic of the local agricultural products taking into account both significance and urgency.

8.3.1 Strengths

Concerning the strengths of the local agricultural products, the regional stakeholders stated in a hierarchical way about the local agricultural products that:

1. They support the local economy and jobs

2. They have better taste and quality

3. They support the community and local businesses

4. They are made from fresh ingredients, minimally processed, with more natural ingredients

5. There is a better connection and trust with local producers

6. They are healthier and have more nutrients

7. They are more authentic and unique

8. The environmental impact or carbon footprint is reduced

9. There is better food safety and traceability

10. Prices are lower

Table 8.1 Eisenhower matrix of strenghts

STRENGTHS	Important	Urgent
• They support the local economy and jobs (S1)	4,55	4,34
• They have better taste and quality (S5)	4,62	4,21
• They support the community and local businesses (S2)	4,46	4,28
• They are fresh ingredients, minimally processed, with more natural ingredients (S4)	4,42	4,15
• There is a better connection and trust with local producers (S10)	4,32	4,22
• They are healthier and have more nutrients (S7)	4,33	4,1
• They are more authentic and unique (S9)	4,26	4,12
• The environmental impact or carbon footprint is reduced (S3)	3,96	4,14
• There is better food safety and traceability (S8)	3,9	4,03
• Prices are lower (S6)	3,01	3,44

Source: Author's own work

All of them seem to be on the upper left quarter of the matrix (see below), which states that all of them are urgent and important. Local agricultural products support the local economy and jobs, so they contribute to the economic and social sustainability of Crete; they have better taste and higher quality than non-local ones, due to the unique characteristics of the land elements of Crete. The local agricultural products support the local community and local businesses, contributing to social sustainability as well. They are made of fresh ingredients, minimally processed, with more natural ingredients, making them seem healthier and of higher quality compared to the imported ones.

The connection with the local producers is direct, effective and based on trust, so if there are some complaints, you can directly communicate with the producer compared to the imported

ones, where most times it is very difficult to find the producer. Local agricultural products are healthier having more nutrients than the conventional ones since they are fresher than the imported ones. They are more authentic and unique, meaning that they cannot be found elsewhere. Furthermore, the environmental impact or carbon footprint is reduced since the CO2 emissions from transportation are less than the imported ones, contributing to the environmental sustainability. There is better food safety and traceability than other imported products, where the production process is not so clear.

Prices are not considered to be so low. In Crete the producers cannot achieve economies of scale due to their small size. This is a disadvantage of local high-quality products and it is one of the reasons that some food establishments prefer not to provide local agricultural products in their establishments, replacing them with other products of lower quality from other regions or from other countries.

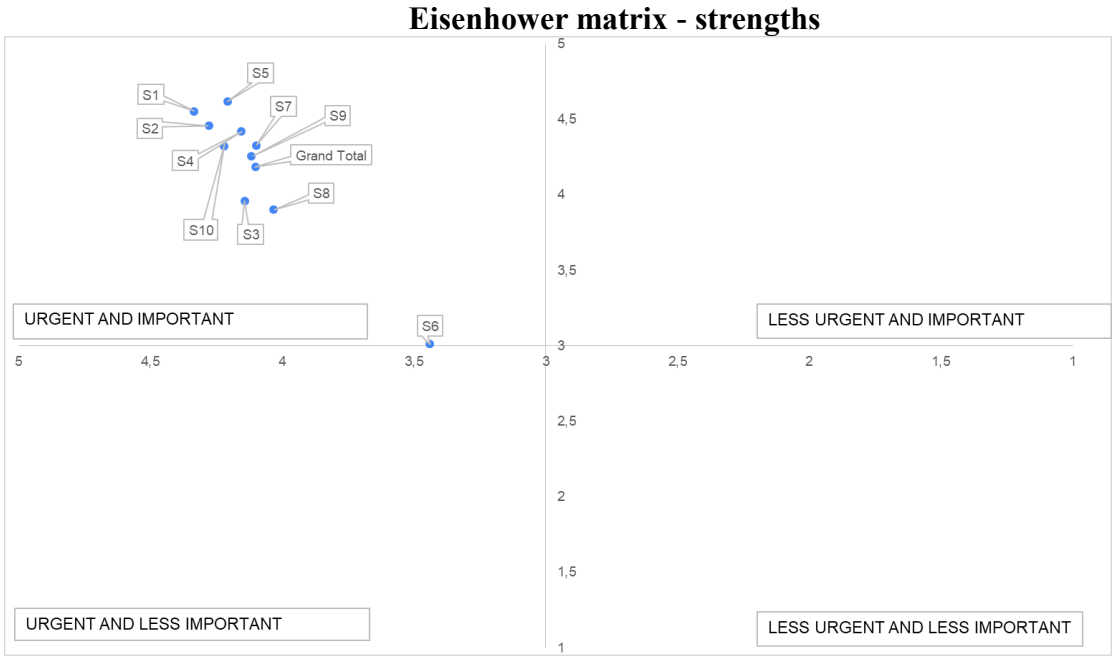


Figure 8.3 Eisenhower matrix - strengths
Source: Author's own work

8.3.2 Weaknesses

Concerning the weaknesses of the local agricultural products, the regional stakeholders stated in a hierarchical way about the local agricultural products that the most crucial weaknesses are the following:

1. Aging of the rural population and lack of young people

2. Labor shortages in the rural areas

3. High production costs, especially for energy, oil, fertilizers and animal feed

4. Abandonment of rural areas

5. Bureaucracy and administrative difficulties

6. Lack of vocational training and information

7. Lack of investment and infrastructure

8. Unfair trade practices and limited market access

9. Lack of know-how

10. The small size of agricultural holdings

Table 8.2 Eisenhower matrix of weaknesses

WEAKNESSES	Important	Urgent
• Aging of the rural population and lack of young people (W3)	4,62	4,51
• Shortages of labor in rural areas (W2)	4,59	4,51
• High production costs, especially of energy, oil, fertilizers and animal feed (W10)	4,57	4,5
• Abandonment of rural areas (W4)	4,45	4,43
• Bureaucracy and administrative difficulties (W8)	4,41	4,34
• Lack of vocational training and information (W5)	4,33	4,34
• Lack of investment and infrastructure (W6)	4,31	4,28
• Unfair trade practices and limited access to markets (W9)	4,15	4,14
• Lack of know-how (W7)	3,96	4,01
• Small size of agricultural holdings (W1)	4,01	3,86

Source: Author's own work

All of them seem to be on the upper left quarter of the matrix (see below), which states that all of them are urgent and important. The main weaknesses of local agricultural products are the aging of the rural population. It is a fact that the rural population is very old and there is a lack of young people available to support the agricultural sector. The lack of a labor force is evident, since most people, especially locals, are reluctant to work in agriculture. The high production costs, especially for energy, oil, fertilizers and animal feed, are a reality, especially after the invasion of Russia in the Ukraine, which makes it very difficult for the

farmers to cover the needed costs. Abandonment of rural areas is a reality, since there is a lack of interest especially from the young people to stay and work in rural areas.

Bureaucracy and administrative difficulties are also issues that farmers face and there should be found fast-track procedures to solve the issues that emerge. Farmers have a lack of vocational training, since most of them have no specialised education and most of the times they are not aware of some topics since it is very difficult to find the information needed. Educational institutes should provide seminars to farmers in order to be better educated in agricultural topics and be informed about the latest technologies and trends of the market. Lack of investment and infrastructure is another issue, which the government, through banks, could assist with in the provision of low interest loans and subsidies.

Unfair trade practices and limited market access are problems that the majority of the farmers face and the educational institutes could help them with the provision of an efficient strategic marketing plan for better access to new markets. Lack of know-how is crucial, especially in new technologies, so seminars should be provided by educational institutes. Finally, the small size of agricultural holdings is a permanent problem in Crete that prevents economies of scale to be achieved. To overcome this problem, cooperation is needed among the farmers in order to enlarge their holdings and gain the benefits.

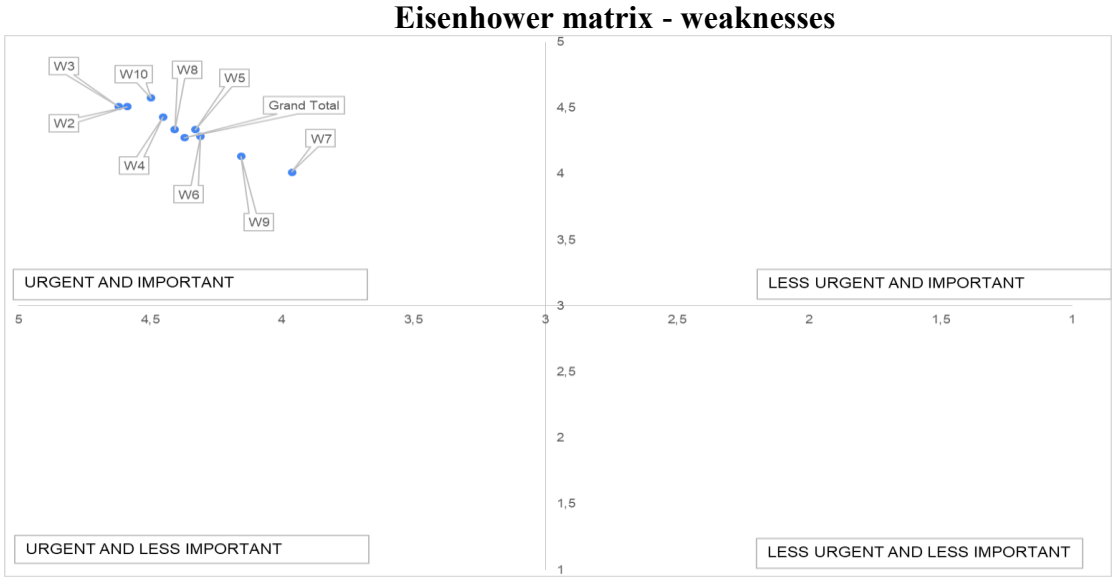


Figure 8.4 Eisenhower matrix - weaknesses
Source: Author's own work

8.3.3 Opportunities

Concerning the opportunities for local agricultural products, the regional stakeholders stated in a hierarchical way about the local agricultural products that the most promising opportunities are the following:

1. Tax incentives and financing to optimize source allocation between crops

2. Connecting university research departments with the primary sector and agribusiness

3. Environmental protection, reduction of pollutant emissions

4. Increase in employment

5. Strengthening the investment activity and entrepreneurship of small and medium-sized enterprises

6. Improvement and modernization of existing infrastructures as well as the creation of new ones

7. Strengthening the competitiveness of enterprises

8. Registration and certification of agricultural products and their standardization and marketing processes

9. Balanced regional development with diversity of arable land (restructuring)

10. Information, training, mobilizing, introducing and rewarding innovation through business competitions

Table 8.3 Eisenhower matrix of opportunitites

OPPORTUNITIES	Important	Urgent
• Tax incentives & financing to optimize the allocation of sources between crops (O7)	4,39	4,37
• Connecting university research departments with the primary sector and agricultural enterprises (O6)	4,39	4,33
• Environmental protection, reduction of pollutant emissions (O4)	4,35	4,35
• Increase in employment (O2)	4,34	4,3
• Strengthening the investment activity and entrepreneurship of small and medium-sized enterprises (O5)	4,35	4,27
• Improvement and modernization of existing infrastructure as well as the creation of new ones (O10)	4,31	4,31
• Strengthening the competitiveness of enterprises (O3)	4,29	4,17
• Registration and certification of agricultural products and their	4,26	4,18

standardization and marketing processes (O9)		
• Balanced regional development with diversity of arable land (restructuring) (O1)	4,19	4,12
• Information, training, mobilization, introduction and reward of innovation through business competitions (O8)	4,04	3,89

Source: Author's own work

All of them seem to be on the upper left quarter of the matrix (see below), which states that all of them are urgent and important. Tax incentives & financing to optimize source allocation between crops are on the agenda of the government, encouraged by suitable programs that will support farmers and the economical sustainability of the sector. The connection between university research departments and the primary sector & agribusiness is also very crucial since it is observed that farmers and agribusiness are not informed regarding the latest evolution of the agribusiness sector at the national, European and international level. Academic institutes could provide such information to them, bridging the gap between the connections of academic institutes with the agricultural sector by disseminating all the up-to-date knowledge to them. Environmental protection by the reduction of pollutant emissions will satisfy the environmental sustainability of the area, supported by the appropriate energy policies of the Region in the framework of the directives of the European Union that are in line with this direction.

Due to the continuous increase in the number of tourists coming to Crete in the last years, there is a need for more staff, so employment will be increased. Strengthening the investment activity and entrepreneurship of small and medium-sized enterprises will be a priority in order for small–medium enterprises to survive and be competitive. The improvement and modernization of the existing infrastructures as well as the creation of new ones is a necessary condition in order to attract more visitors and better promote the local agricultural products.

The competitiveness of enterprises will be increased by the participation of more enterprises in a wider network with a common target. Registration and certification of agricultural products and their standardization and marketing processes is on the top of the list of the agribusinesses, with an opportunity to participate in the common brand name of "Crete". Balanced regional development with a diversity of arable land (restructuring) will take place in the next years since some crops should be replaced by others according to the needs of the

market and the needs of every crop which sometimes cannot be satisfied. Information, training, mobilizing, introducing and rewarding innovation through business competitions will be an opportunity for agribusiness in order to become innovated.

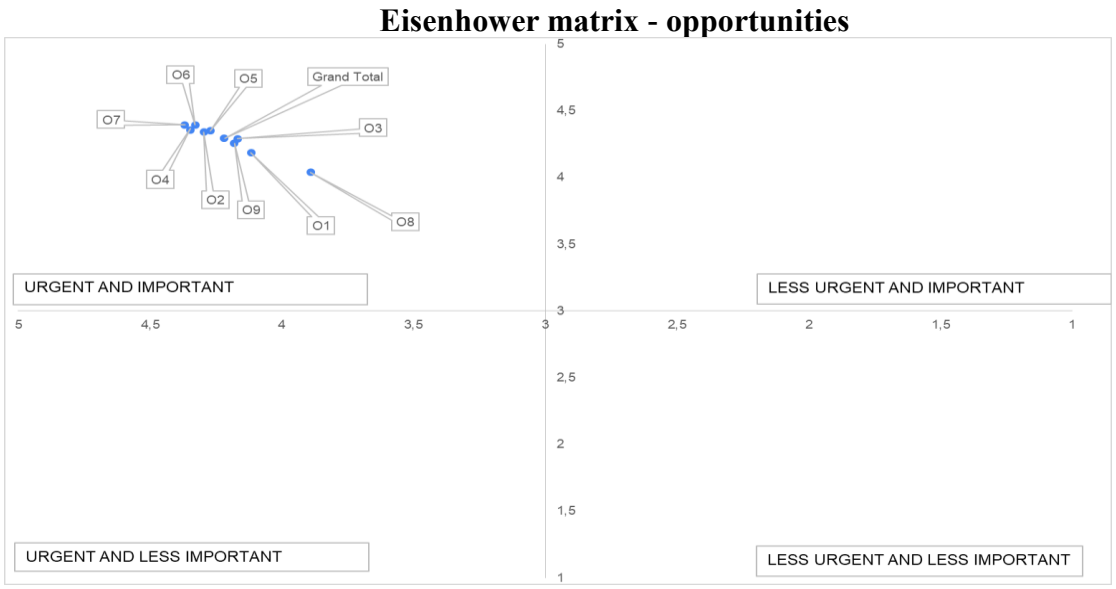


Figure 8.5 Eisenhower matrix - opportunities
Source: Author's own work

8.3.4 Threats

Concerning the threats of the local agricultural products, the regional stakeholders stated in a hierarchical way about the local agricultural products that the most crucial threats are the following:

1. Climate change

2. Inconsistent tactics in the implementation of subsidies, resulting in little protection and unequal treatment between regions and producers

3. Increased Hellenization of important Greek products that distort competition

4. Failure to adapt with the insurance regulations and the absence of elementary preparation for the increasing losses

5. Imports of cheap low-quality agricultural products

6. Irrational organization and management of agricultural plots

7. Lack of basic functioning of the banking system and lack of liquidity

8. Marginalization of farmers, livestock farmers, cooperatives, groups, TOEBs and processing from the possibility of using RES

9. Changes in consumption patterns (fast foods)

10. Failure to deal with bad loans of farmers, livestock farmers and poultry farmers (T6)

Table 8.4 Eisenhower matrix of threats

THREATS	Important	Urgent
• Climate change (T8)	4,41	4,42
• Wrong tactics in the implementation of subsidies, resulting in little protection and unequal treatment between regions and producers (T4)	4,37	4,37
• Increase in cheap imported agricultural products that distort competition (T1)	4,34	4,33
• Failure to adapt with the insurance regulations and the absence of elementary preparation for the increasing losses (T3)	4,23	4,28
• Imports of cheap low-quality agricultural products (T9)	4,23	4,24
• Irrational organization and management of agricultural plots (T7)	4,1	4,1
• Lack of elementary functioning of the banking system and lack of liquidity (T5)	4,1	4,08
• Marginalization of farmers, livestock farmers, cooperatives, groups, and processing from the possibility of using RES (T2)	4,06	4,08
• Changes in consumer standards (fast food) (T10)	4,01	3,98
• Failure to deal with bad loans of farmers, livestock farmers and poultry farmers (T6)	3,88	3,92

Source: Author's own work

All of them seem to be on the upper left quarter of the matrix (see below), which states that all of them are urgent and important. Climate change is the threat that is most important and urgent, which is why appropriate measures have already been taken and will continue in the future not only at the regional level, but worldwide. Inconsistent tactics in the implementation of subsidies, resulting in little protection and unequal treatment between regions and producers, is a topic that should be handled from the government by looking separately into each Region's real problems and needs, because each Region has different characteristics. Increased Hellenization of important Greek products is a serious problem that distorts competition and quality, leading to producer mobilizations, as illegal imports with "smart" labels create unfair competition and harm the national and local economy, requiring stricter supervision by the authorities.

Failure to adapt with insurance regulations and the absence of elementary preparation for increasing losses is a threat for farmers and posits a need to be well prepared. Imports of cheap low-quality agricultural products are a serious threat because they replace local products, distort competition and deteriorate the brand image of the destination. Lots of farmers cannot optimize the organization and management of their agricultural land and they should be supported by the relative stakeholders. Sometimes there may be a lack of basic functioning of the banking system and a lack of liquidity, which prevents farmers from investing in their business. Farmers, livestock farmers, cooperatives, and producer groups have fewer possibilities of participating in programmes for Renewable Energy Sources, due to the fact that funds for such investments have been mainly oriented to the tertiary and secondary sectors.

It is evident that fast food shops have spread worldwide, changing the consumers' habits and standards. This trend distorts the competition of the local agricultural products, since fast foods are made of cheap and low-quality products at a very low price, and they are preferred over local gastronomy. Finally, there is the possibility of failure to address the "red" loans of farmers, which will make it very difficult for the farmers to survive in the field.

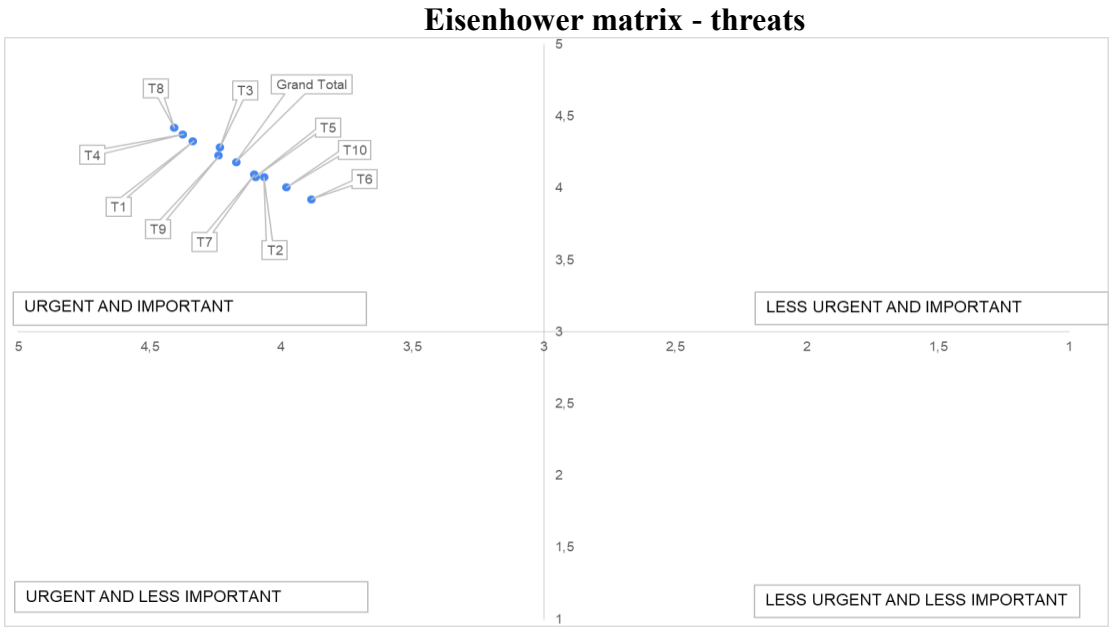


Figure 8.6 Eisenhower matrix - threats
Source: Author's own work

8.4 Impact of the agricultural sector on tourism

Concerning the impact of the agricultural sector on tourism, it seems to be very crucial. Stakeholders stated that the natural environment and culture constitute a comparative food tourism and agrotourism advantage of the region, while local traditions and culture and their connection with the food tourism of the region together with the participation of local residents in food tourism development activities could contribute to the further satisfaction of tourists, highlighting Crete as a popular food tourism destination. The Cretan diet and the quality of local agricultural products contribute significantly to attracting tourists, while consumption of local agricultural products contributes to the development of knowledge and sociability as well as to the health of tourists. Regarding the extension of the tourist season, the existence of airlines during the winter months together with the appropriate promotion of food tourism and the participation of tourists in agrotourism and related activities (olive picking, grape growing, cheese production, etc.) could significantly contribute to this direction. On the other hand, it is stated that more agrotourism and food tourism activities in the region should be developed, and the infrastructure (road network, signage) and access especially to some agrotourism firms needs to be highly improved in the region.

Table 8.5 Impact of the agricultural sector on tourism

IMPACT OF THE AGRICULTURAL SECTOR ON TOURISM	Important
• The natural environment and culture constitute a comparative food tourism and agrotourism advantage of the region (AT4)	4,61
• Local tradition and culture and their connection with the food tourism of the region contribute to the highest level of satisfaction of tourists (AT7)	4,50
• Crete is a popular food tourism destination (AT1)	4,46
• The existence of airlines during the winter months could contribute to the extension of the tourist season (AT3)	4,41
• The Cretan diet and the quality of local agricultural products contribute significantly to attracting tourists (AT5)	4,28
• Consumption of local agricultural products contributes to the development of knowledge and sociability as well as to the health of tourists (AT6)	4,27
• With the appropriate promotion of food tourism and the participation of tourists in agrotourism and related activities (olive picking, grape growing, cheese production, etc.), the tourist season could be extended to the winter months (AT2)	4,19
• The participation of local residents in food tourism development activities could contribute to the further satisfaction of tourists (AT10)	4,14
• There are numerous agrotourism and food tourism activities in the region (AT8)	3,39
• Infrastructure (road network, signage) and access are at a satisfactory level in the region (AT9)	2,50

Source: Author's own work

8.5 Main problems and obstacles that hinder the promotion of local agricultural products in tourism

Regarding the promotion of local agricultural products in the tourism sector, there seem to be some main problems, such as a lack of an organized network for the marketing and distribution of the products, lack of marketing techniques, and a lack of a coordinating body to manage that network, since there is a lack of cooperation and trust between local businesses. Some other problems are the limited supply of seasonal agricultural products, and the creation of agreements with other large businesses outside the region and territory, which results in the higher prices of the local agricultural products compared to imported similar ones.

The existence of a multistakeholders' network, with an efficient coordinating body will be of the benefit of all the members since knowledge will be shared; trust, mutual understanding and personal relationships will be developed among the members; innovation will be enhanced that could asssit in the marketing and distribution procedures as well as in the enhancement of several properties of the products; restriction of the imported products could be achieved due to the higher negotiation power of the network that could lead to the provision of the local products at reasonable prices; agreements with other large businesses outside of the region could be achieved in different sectors that could improve the sales of local products.

Table 8.6 Main problems for the promotion of local agricultural products

MAIN PROBLEMS FOR THE PROMOTION OF LOCAL AGRICULTURAL PRODUCTS	Important
• Lack of an organized network for the marketing and distribution of products (WP4)	4,30
• Lack of marketing techniques of products (WP3)	4,25
• Lack of a coordinating body (WP1)	4,24
• High prices in relation to imported products (WP6)	4,08
• Lack of cooperation and trust between local businesses (WP2)	4,01
• Creation of agreements with other large businesses outside of the region and territory (WP7)	4,00
• Limited supply of seasonal agricultural products (WP5)	3,74

Source: Author's own work

8.6 Collaboration potentialities

Almost all the stakeholders agreed on the fact that small-medium tourism enterprises could collaborate in order to offer combined tourism packages, providing a full package to tourists and increasing their income at the same time.

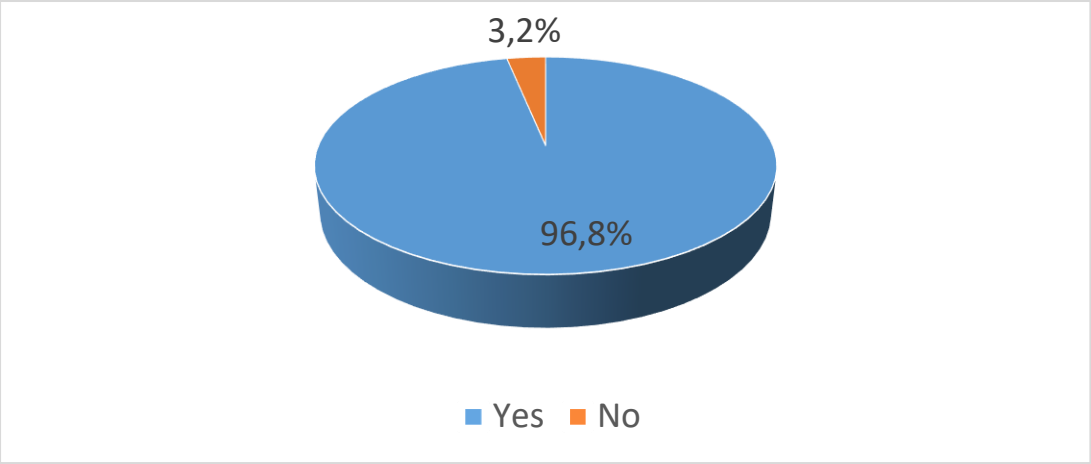


Figure 8.7 Collaboration among small and medium sized tourism enterprises
Source: Author's own work

The sectors that could develop collaboration among them are mainly farmers with hotels and restaurants. Farmers could provide their high-quality products directly to hotels and restaurants and the hotels/restaurants could reduce the low-quality imported products from other countries. Other tourism and cultural businesses could act in a similar way to enhance the overall experience and satisfaction of tourists concerning the destination, by providing and connecting food activities with culture, history and mythology. Travel agents/agencies are also significant in order to suggest and provide the appropriate agrotouristic routes and activities to tourists. The role of academic and research institutes is very important and can act as an intermediary stakeholder in order to bridge the gap between theory and the real market, by providing to farmers all the necessary data, knowledge and information so as to better manage their products and promote them in the market.

Tour guides are necessary in order to enhance the knowledge and experience of tourists when they visit agrotouristic companies or any other sightseeing related with food. Municipalities and public bodies should develop, design and apply policies that encourage and enhance the production of local agricultural products, by giving incentives to people to stay in the rural areas and enhance their income. Environmental companies and firms that are active in

Renewable Energy Sources are also vital in order to prompt agricultural companies to use environmentally friendly methods of producing their products, by decreasing at the same time CO2 emissions and be adaptive to the challenges of climate change. Finally, transportation companies such as public buses should be very punctual with the timetables, providing frequent routes in agrotouritic places and connecting some distant agrotouristic companies in order the proximity problems to be solved. Rental car companies should keep the prices at reasonable levels in order to be more affordable to tourists to use them more days in order to visit agrotouristic companies in the region.

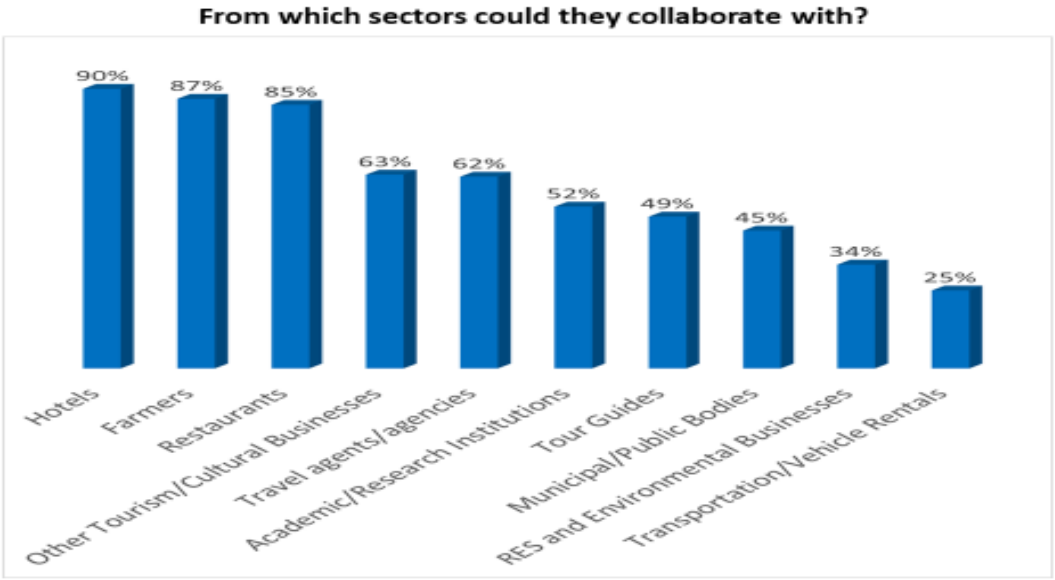


Figure 8.8 Sectors of collaboration
Source: Author's own work

8.7 Promotion of local agricultural products to tourists

According to the regional stakeholders, local agricultural products should be promoted by having a label. Branding is very crucial for the promotion of the product. Local agricultural products should be promoted in catering and accommodation facilities, so that tourists could have the opportunity to taste and buy them. Creation of a platform where tourists can learn about local agricultural businesses and local agricultural products is of utmost importance, hosted on a formal prestigious website or/and instagran (food-stagramming) of the Region that should be continuously updated in order for tourists to get familiar with all the provided products and activities and upload their impressions as well. Visits to farms, olive mills,

wineries, dairies and generally to businesses of gastronomic interest should be well organized and provided by an expert guide, that could perfectly promote all the local food consumption values together with the history, culture of the food establishment and the destination.

Advertising agricultural products with tourist content, advertising spots which are broadcast from time to time on well-known television channels and the production of documentaries will lead to the successful promotion of the local agricultural products. Exhibitions can take place in Greece or abroad in order for the local agricultural products to become known outside of the boundaries of Crete. An Institution can be created that will organise an annual agri-food exhibition to take place every year in Crete with the participation not only of regional farmers but also with entrepreneurs from other countries (international exhibition) in order to come to Crete, taste the local agricultural products and make deals directly with local producers through B2B meetings. Cooking lessons and competitions based on the island's local agricultural products could also take place not only at the regional level, but also at the national and international level, in order to promote the high-quality agricultural products and the popular Cretan gastronomy, which is very tasty and healthy.

Table 8.7 Promotion of local agricultural products to tourists

HOW COULD LOCAL AGRICULTURAL PRODUCTS BE PROMOTED TO TOURISTS?	Important
• Branding on all local agricultural products (label) (P10)	4,62
• Promotion of local agricultural products in catering and accommodation facilities (P9)	4,59
• Creation of a platform where tourists can learn about local agricultural businesses and local agricultural products (P8)	4,47
• Visits to farms, olive mills, wineries, dairies and generally to businesses of gastronomic interest (P7)	4,44
• Advertising agricultural products with tourist content (P3)	4,27
• Documentaries for the promotion of local agricultural products (P5)	4,2
• Advertising spots, which are broadcast from time to time on well-known television channels (P6)	4,12
• Exhibitions taking place in Greece or abroad (P1)	4,02
• The creation of an institution, an annual agri-food exhibition, which takes place every year in Crete (P4)	3,95
• Cooking competitions based on the island's local agricultural products (P2)	3,89

Source: Author's own work

8.8 Impact of food tourism on Agriculture in the Region of Crete

According to the regional stakeholders, the impact of food tourism on the agricultural sector is very high and beneficial. Food tourism contributes to the sustainability of the Region to a high degree. Economic sustainability is achieved by the increase of sales of local agricultural products in the Region, so the regional income is increased at the same time; social sustainability is achieved by the increase of agricultural land use with the increase of employment for local residents of rural areas, acting as a deterrent to the abandonment of the countryside; cultural sustainability is achieved by the preservation of the culture from local residents; environmental sustainability is achieved by the implementation of friendly production processes. Moreover, with the great potentialities of food tourism, there is an incentive for those who are actively involved in the agrotouristic sector to improve their level of knowledge, skills and competencies through their participation in educational programs/seminars that academic and research institutes provide in order to increase their competitiveness.

Table 8.8 Impact of food tourism on agriculture

IMPACT OF FOOD TOURISM ON AGRICULTURE	Important
- Food tourism increases sales of local agricultural products in the region (TA3)	4,32
- Food tourism improves the income level of the region (TA2)	4,29
- Food tourism overall benefits the agricultural sector of the region (TA10)	4,26
- Food tourism increases employment for local residents of rural areas (TA4)	4,23
- Food tourism acts as a deterrent to the abandonment of the countryside (TA7)	4,18
- Food tourism contributes to the sustainability of the region (TA1)	4,13
- Food tourism has a positive effect on the culture of the local residents (TA9)	4,08
- Food tourism is an incentive for improving the level of knowledge, skills and competences of those involved (TA6)	4,00
- Food tourism increases agricultural land use (TA8)	3,98
- Food tourism protects the environment by following environmentally friendly production processes (TA5)	3,94

Source: Author's own work

8.9 Discussion

The involvement of local stakeholders is significant for the enhancement of sustainability. The creation of local networks of key stakeholders from different sectors with an efficient coordination is of utmost importance for the effective promotion of the local food products and the touristic destination through well-structured marketing techniques that could help

SMEs to enhance their competitiveness. The network should be supported by the up-to-date knowledge provided about the agricultural and tourism sectors from academic/research Institutes, the encouragement of environmentally friendly policies by the Region to cope with climate change and the financial aid from the Government in the form of subsidies, tax incentives and low-rate loans, in order to have the liquidity needed to take up the required investments and increase the efficiency through innovation. This will lead to the improvement of the quality of agricultural products, the reduction of the prices due to the achievement of economies of scale, the exclusive promotion to the food establishments through special agreements based on relationships of trust that will restrict imports of low-quality products and improve destination's food image in the Region and the related behavioral intentions of tourists.

The main findings are also consistent with other surveys. Coordination, voice mechanisms, knowledge sharing, mutual understanding (Soontiens et al., 2018), trust and personal relationships (Roy et al., 2017) could contribute significantly to the internalization of small producers (Musso and Francioni, 2015), the enhancement of innovation in local food products (Szpilko, 2017) and the provision of solutions for proximity difficulties in an urban target market where the local industry is located in rural areas, which could act as a competitive advantage compared to other touristic destinations.

The engagement of local people and guides also plays a key role in the sustainable development of the area. Local people could act as part-time marketers through their interaction with tourists, evoking memorable food experiences (Bjork and Kauppinen-Raisanen, 2019), supporting participatory experiences (Wu et al., 2015), assisting in the transmission and preservation of knowledge attributes, culture and production methods (Kohsaka et al., 2016), taking part in food product tours (Millán-Vazquez de la Torre et al., 2017) and offering experiential activities to tourists (Lee et al., 2015a), which could lead to the sustainable development of the Region of Crete that emphasizes the unique economic, cultural and environmental characteristics of a place, increasing the level of satisfaction and creating favorable intentions to revisit and recommend the destination.

Finally, the outcomes of the survey could be a useful tool for the all the relative stakeholders in the Region of Crete, a quite a high number of key stakeholders from the tourism and

agricultural sectors, together with academic/research institutes and public authorities, participated in order to pinpoint the strengths, weaknesses, opportunities, and threats of local agricultural products, through the use of Eisenhower matrix methodology, as well as prioritizing individual parameters in order to determine needs and find ways to promote food tourism in the Region of Crete through a collective synthesis of the opinions of the relevant stakeholders.

CHAPTER 9

9.1 Conclusions

The greek economy has totally recoverd from the coronavirus crisis, since the national Gross Domestic Product (GDP) in 2025 has reached and overcome the levels of 2008 as well, which was the highest GDP ever recorded in Greece, and the same also holds true for the Region of Crete. Concerning the Regional Units of Crete, based on the the most recent data (2023), the Regional Unit of Heraklion comprises almost half of the regional GDP, Chania one fourth and Rethymnon together with Lasithi the remaining quarter, whereas Lasithi has the highest GDP per capita in Crete and Heraklion the lowest.

The contribution of the Primary sector of Greece to the national GDP based on the Gross Added Value (2023) was formed at very low levels of 4,3%, whereas in Crete it was higher at 9,9%, but it is still the less developed sector at the regional and national level over time. Comparing the Regional Units, Lasithi seems to have the highest contribution at the prefectural level with increasing trends over time and Heraklion the lowest. Concerning the Secondary sector, the trend is downward from 2006 and onwards at both the national and regional level, with the contribution of the Secondary sector being higher in Greece compared to Crete which was at 12,5%. Comparing the Regional Units, Lasithi, excluding the last year, also has the highest contribution at the prefectural level and Rethymnon the lowest over time. Regarding the Tertiary sector, the trend is exactly the same at both the national and regional level, with the contribution reaching 77%, being the most developed sector at the national and regional level with stabilized trends from 2020 and onwards, although it was seriously affected by the coronavirus crisis. Comparing Regional Units, Heraklion, Chania and Rethymnon have the highest and almost the same contribution at the Prefectural level and Lasithi the lowest, but this sector is still the most developed in all Regional Units.

Employment was decreasing from 2010 till 2015 in Crete by 20%, but afterwards there was an increasing trend till 2020 and although there was a decrease in the pandemic year in Crete, employment recovered over the next years. Crete represents the 6,2% of the total employment of Greece in 2025. Full-time employment dominates by more than 90% of the employees, with around 57% being men and 43% women, with an increasing trend of employees aged 15-24 years old over time at both the national and regional level. The

unemployment rate is always lower in Crete than in Greece over time and after the increasing trend from 2008 till 2013, there was a continuous decrease till 2025, excluding the coronavirus period, reaching 8,9% in Greece and 5,2% in Crete.

The direct contribution of tourism on the GDP was much higher in Crete with 48,8% in 2025 than in Greece which was estimated at 13%. Almost one out of five employees in Crete were working in touristic catering and accommodation branches, mainly full-time, with the accommodation branch being preferred slightly more by employees aged 45-54 years old and women, while the catering branch is preferred slightly more by employees aged 35-44 years old and men.

Regarding touristic accommodations, Crete comprised 16% of the total national hotel units and 22% of the total national hotel rooms and beds in 2025. Two thirds of the hotels in Crete are small (21-50 rooms) and family-size hotels (1-20 rooms), while four out of ten hotels are 4- and 5-star hotels, with an increasing trend from 2010 and onwards regarding the 5-star hotels. Concerning the Regional Units of Crete, Chania comprises 36% and Heraklion 31% of the total hotel units of Crete, whereas Heraklion comprises 41% and Chania 27% of the total hotel rooms of Crete, which means that hotel units in Heraklion are bigger. Moreover, the most luxurious 4- and 5-star hotels are located in Heraklion with 38%; Chania follows with 28%, whereas most 1-, 2- and 3-star hotels are located in Chania with 41%, followed by Heraklion with 27%.

Concerning other types of touristic accommodations, three out of four rooms-apartments for rent in Crete are characterized as 2K and 3K, while the Regional Unit of Chania comprises 39% followed by Rethymnon and Heraklion with 24% and 23%, respectively, whereas Chania comprises 35%, Heraklion 32% and Rethymnon 21% of the total rooms in Crete, meaning that the room-apartment units of Heraklion are bigger than all the other units in Crete. Concerning furnished tourist residences, Rethymnon comprises 40% of the total units of Crete, followed by Chania with 34%, whereas Chania comprises 35% of the rooms of the total furnished tourist residences of Crete, followed by Rethymnon with 32%, meaning that Chania has bigger furnished tourist residences. Chania comprises 40% of the total villa units of Crete, followed by Heraklion with 24% with no difference in the room allocations. As far as AirBnB (short-term rental) units in Crete are concerned, there was a high increase of 49%

in 2024 compared to 2019. Crete comprised 15% of the total AirBnB units in Greece. The Regional Unit of Chania comprises the most AirBnB units of Crete with 41% and then Heraklion follows with 27% with no significant difference in room allocations. Regarding camping facilities, Crete comprises 5% of the total camping units and 3% of the total positions of Greece, with no significant change from 2019 and onwards.

Arrivals of cruise ships and passengers coming to Crete and Greece through cruise ships increased in 2025 rather more than the respective arrivals in the pre-covid era. 9% of the total cruise ships that came to Greece arrived at the ports of Crete, consisting the 12% of the total cruise ship passengers of Greece. Half of the total cruise ships that came to Crete arrived in the Regional Unit of Heraklion and one third in Chania, whereas 55% of the passengers arrived in Heraklion, with a significant increase of passengers from 2019, and 40% arrived in Chania, with a significant increase of passengers compared to 2024. Concerning passengers of domestic ships, they seem to be at a lower number than in the pre-covid era, with the passengers who prefer Heraklion being 50% more than those who prefer Chania.

Concerning the arrivals of foreign tourists who are coming through international flights, there is an increasing trend from 2010 and onwards at the airports of Crete, constituting the 20% of the total foreign arrivals coming in Greece through international flights in 2025. Especially at the airport of Chania, the increase is almost 2,5 times more and the arrivals in Heraklion have been doubled till the year 2025. This vast increase of foreign tourists' arrivals at the airport of Chania is mainly due to the dynamic entrance of the low-cost airline company "Ryanair", which is mainly preferred by non-Scandinavian tourists. Scandinavians comprise 36% of the total foreign arrivals in Chania, whereas 57% of the total foreign arrivals in Heraklion is consisted of Germans, British and French. While there is a record in foreign touristic arrivals who are coming through direct flights in Crete, the arrivals of Heraklion airport are 2,5 times more than those of Chania airport. As far as domestic flights are concerned, there is a significant increase of passengers at both Heraklion and Chania airports compared to the pre-covid era, while the domestic arrivals of Heraklion airport are double than those of Chania airport.

Although the direct arrivals of foreign tourists at the airports of Crete sum up to 5,6 million in 2025, the total visits in Crete are estimated at 6,35 million, meaning that there are 750

thousand tourists who are coming in Crete from another Region of Greece through domestic flights and ships, excluding cruise ships.

In 2025, the revenues coming from foreign visits in Crete through international flights, domestic flights and ships, constitute 19% of the total revenues of all the foreign visits of Greece, excluding cruise ships. 27% of the total revenues of Crete come from Germans, 17% from the British and 9% from the French.

The expenditure per visit and per overnight from foreign visitors over time is always higher in Crete than in Greece with the expenditure per visit in 2025 in Crete being 684 euros while in Greece it was 541 euros. The expenditure per overnight was 89 euros in Crete and 97 euros in Greece and is the first time that the expenditure per overnight in Greece is higher than that of Crete during the period 2016-2025. The average duration of stay is also always higher in Crete than in Greece over time with foreign tourists staying 7,7 days in Crete and 5,6 days in Greece in 2025, while one out of five foreign tourist overnights of Greece are taken place in Crete.

The last two years, revemues coming from foreign visits were decresaed in Crete by 16%, whereas in Greece there was an increase by 14%. This is explained by the fact that although foreign visits have beem increased tourist's expenditure per overninght and the average duration of stay in Crete decreased, whereas in Greece, although the average duration of stay decreased, tourist visits and expenditure per overnight increased.

Based on the most recent data of the figures of hotel accommodations (2024), regarding the arrivals of visitors at hotel accommodations, there was a record at both national and regional level, with the arrivals of foreign and domestic visitors of Crete constituting 18% of the total arrivals of visitors in Greece. Concerning foreign visitors, the Regional Units of Heraklion and Chania comprise 45% and 25% respectively of the total arrivals of foreign visitors in Crete, whereas the gap is smaller concerning domestic visitors. The Regional Unit of Heraklion comprises 39% and Chania 30% of the total arrivals of domestic visitors in Crete.

Regarding overnights at hotel accommodations, there was also a record year at the national level but not in Crete, with the overnights of foreign and domestic visitors in Crete constituting 25% of the total overnights of visitors in Greece. Concerning foreign visitors,

there is no significant difference with the corresponding percentages of arrivals per Regional Units, whereas the gap is much smaller concerning domestic visitors in Heraklion and Chania.

The occupancy of visitors at hotel accommodations is always higher in Crete than in Greece over time with occupancy in Crete being 54% and in Greece 51%. Especially in Crete, it seems that during the pre-covid years, the occupancy was much higher. Comparing the Regional Units of Crete the highest occupancy over time was recorded in Heraklion which has the same percentage in 2024 with Rethymno at 56%, followed by Chania with 53% and Lasisthi with 49%.

In the agricultural sector, based on the most recent data, at the national level, cultivated agricultural land has a decreasing trend from 2011 and onwards, whereas in Crete although there are some fluctuations, it remains almost at the same levels in 2023, while Crete constitutes 9% of the total stremmas of cultivated agricultural land of Greece. Regarding the Regional Units of Crete, almost half of the total stremmas of cultivated agricultural land in Crete are in Heraklion, while all the Regional Units seem to have a small increase of cultivated stremmas from 2011. Chania is the only Regional Unit to record a decrease over time.

The distribution of the total stremmas of cultivated agricultural land in Greece consists of 60% crops on arable land, 36% tree groves (compact plantations), 2,5% vines (grapes and raisins) and 1,5% garden area, whereas in Crete the vast majority consists of 85% tree groves, 8% crops on arable land consists, 5% vines and 2% garden area.

Concerning tree groves, which are consisted mainly of olive groves, Crete constitutes one fifth of the total stremmas in tree groves in Greece. While in Greece there is a slightly decreasing trend of stremmas from 2011, in Crete it is the opposite with almost half the stremmas located in the Regional Unit of Heraklion. Crete constitutes 17% of the total production of olives in Greece, with the Regional Unit of Chania having the most production of olives in Crete with 44%. Crete produces 30% of the total production of olive oil in Greece, with the Regional Unit of Chania producing 41% and Heraklion 36% of the total production of olive oil in Crete in 2023. It should be noted that the olive harvest in Crete and generally in Greece in 2023 was historically low and poor. Ongoing drought conditions, the

prevalence of the olive fruit fly, and structural climate shifts heavily impacted the island's production volume. That outcome had as a consequence that although the olive oil production in the Regional Unit of Heraklion is generally higher than that of Chania over time, since there are more olive trees and olives, the prevailed favorable climate and soil conditions and the restriction of the olive fruit fly, especially at the West part of Chania, resulted in the higher production of olive oil than that of the Regional Unit of Heraklion. Concerning citrus fruit, Crete constitutes 5% of the total production of citrus fruits in Greece, with the Regional Unit of Chania having the most production of citrus fruit with 80% in Crete.

Crete constitutes just 1,3% of the total stremmas of crops on arable land in Greece, with a decreasing trend over time. In Crete, fodder plants for hay are the dominant crops comprising almost 70% of the total regional arable land, with the most stremmas located in the Regional Unit of Heraklion, whereas in Greece, cereals for grain are the most cultivated crops, comprising nearly half the national crop on arable land.

Concerning vines, which consist of grapes and raisins, Crete constitutes 17% of the total stremmas of vines in Greece with a decreasing trend over time, as well as the most stremmas being located in the Regional Unit of Heraklion with 75% each. Heraklion constitutes 60% of the total regional production of grapes for wine, 96% of the total regional production of grapes for table use and 95% of the total regional production of grapes for raisins. Crete also constitutes 14% of the total production of must in Greece, with the Regional Unit of Heraklion producing almost half the production of must in Crete.

In Crete, garden area, which is consisted almost exclusively of horticultural land (areas under vegetables), comprises 10% of the total stremmas of garden area in Greece, also with a decreasing trend over time, with the most stremmas being located in the Regional Unit of Lasithi and Heraklion, at nearly 40% in each Region. Regarding the production of greenhouses products, such as tomatoes, cucumbers, eggplants, and peppers, Lasithi produces the most with percentages of more than 65% in all the products.

Regarding the certified agricultural products of Crete, there are 9 brands of olive oil characterized as PDO and 2 as PGI; 4 cheeses are characterized as PDO, 1 throumba olive as PDO, 1 variety of oranges as PDO, one brand of honey as PDO, the Cretan soultanina raisin

as PGI and the Cretan rusk as PGI. Moreover, there are 7 brands of wines characterized as PDO and 6 wine zones of Crete as PGI.

Furthermore, there are in total 171 certified businesses in Crete that have been awarded with the Cretan labels “Crete-Land of values”, “Cretan cuisine”, “Cretan taste” and “Cretan brunch”. In Heraklion there are 83 certified businesses having been awarded with the above labels, whereas 35 enterprises in each of Chania and Rethymnon have been awarded with the labels “Crete-Land of values” and “Cretan cuisine”, and 18 enterprises in Lasisthi. Moreover, there are 2 certified businesses that have been awarded with the label “Cretan grocery” which are located in Attica, outside of Crete.

Over a hundred (114) enterprises in Crete have been certified with the label “Crete-Land of values” in their local agricultural products such as extra virgin olive oil, dairy products, cheese products, fruit and vegetables, among others, with almost half of them located in the Regional Unit of Heraklion. 51 are enterprises in Crete that have been certified with the label “Cretan Cuisine” with almost half of them being restaurants/tavernas, while the other restaurants are connected with hotels, with almost half of them also located in Heraklion. Four are enterprises that have been certified with the “Cretan taste” label, all of which are located in Heraklion. Moreover, 3 are certified enterprises that have been awarded with the “Cretan grocery” label and all of them are located in Attica.

Concerning wines, there are 11 indigenous varieties, 7 white and 4 red varieties, and 36 wineries in Crete, with almost three out of four wineries located in the Regional Unit of Heraklion. As far as ancient olive trees are concerned, 14 have been characterized as monumental olive trees and proposed for the award of Europa Nostra, with 6 of them being located in the Regional Unit of Chania, 4 in Heraklion and 2 in Rethymnon and Lasithi.

Food tourism is developing with a very fast growth rate in recent years. There are lots of travellers, foodies, food hunters and gastronomes, whose primary motivation is to visit a destination in order to taste the local agricultural products and/or take up related activities, to learn and explore local culture, history, and food authenticity, by acquiring memorable experiential experiences, contributing to the sustainable development of the touristic destination. Although there is no consensus on the definition of “local” concerning the production site, this does not seem to be so important, since tourists are interested mainly in

the quality characteristics of the food product. The terms ‘cuisine’ and ‘culinary tourism’ have been replaced by the terms ‘gastronomy tourism’ and ‘food tourism’. It is noted that the first two terms are usually used to describe ethnic food.

A bibliometric analysis of 290 relative papers from 44 scientific journals, taking under thorough examination the most relative papers during the period 2014-2025, showed that the majority of papers were produced in Spain, China, Australia, USA, UK and Italy, however those numbers were reduced when place of reaserch is mentioned, which implies that the academicians of the beforementioned nations were conducting research in other countries as well. Moreover, the majority of the papers were written by two to four authors, deriving from one or two academic Institutes. Regarding the type of research, the majority of studies were using quantitative methods, mainly SEM, conducting CFA and/or EFA. On the other hand, methods such as as thematic and content analysis, nentography, ethnographic and phenomenological analyses were mostly used in qualitative methods.

The vast majority of the papers were focused on food products and the researches were mostly conducted at restaurants and food establishments. Almost two out of three papers were referring to the demand side (tourists), around 2,5 times more than those related to supply, referring mainly to local and national rather than international tourists, whereas there are only a few papers that refer to both the supply and demand sides. Moreover, an analysis of all the three main dimensions of sustainability at the same time, namely economic, environmental and sociocultural, was also limited.

A complex multidimensional conceptual model was developed for food tourism management under a holistic approach taking into account the demand and supply perspectives, as well as broad categories of food tourism such as motives, culture, history, authenticity, marketing and experiences that increase the level of satisfaction towards local food and related food activities that will positively affect the intentions to purchase and recommend a food product, as well as to revisit and recommend a food service establishment/destination.

Food tourism sustainability development refers mainly to economic, socio-cultural and environmental dimensions, taking into account the involvement of tourists and local stakeholders. The intentions of tourists to consume local food products, to revisit the destination and recommend the place as a gastronomic destination could contribute to the

sustainable development of the area. In addition, the creation of a local network of key stakeholders will facilitate for the effective promotion of local food products and the enhancement of the food image of the touristic destination.

Looking at the demand side, the first survey took place in Crete throughout the touristic period of 2021 in order to pinpoint the profile of tourists who visit Western Crete, concerning their opinions and interests about local agricultural food products and related food activities. The majority of tourists were young up to 44 years old, one out of five tourists were students, the annual average family net income was around 60.000 euros, with 800-850 euros expenditure per visit of group, during their vacations mainly in the Regional Unit of Chania (excluding the expenses for air tickets and accommodation). Almost one out of three tourists had visited Crete before coming in 2021 directly from their home town mainly through non-low-cost flights. The majority of the tourists stayed at luxurious hotel accommodations, whereas there were a significant percentage of tourists who came with friends as company rather than relatives, making all the travel arrangements alone and not through a travel agency/tour operator.

In that research it was found that three out of ten international tourists claimed that food experiences were very important to them in order to choose Crete as their final destination and half the tourists declared that food experiences very much met their expectations. Moreover, almost half of the tourists' budget was spent on food and beverages, consuming them mainly at restaurants/tavernas and cafeterias with a high degree of satisfaction. The consumption of local agricultural products was at a satisfactory level, with tourists purchasing mainly olive oil, wine, cheese, fresh orange juice, tsikoudia, honey, herbs & spices and rusk bread. A high percentage of tourists preferred to stay in their accommodations for food, but almost one out of three tourists declared that the local agricultural products were not available at their accommodations. Finally, a very high percentage expressed the view that they would like to find Cretan agricultural products in their country, highlighting their high degree of satisfaction.

Moreover, the behavioral intentions of tourists were investigated with an extended Theory of Planned Behavior Model including satisfaction as a mediator between perceived value/ perceived quality and behavioral intentions. It was found that perceptions of the value and

quality of local food have a positive influence in visitors' satisfaction, which in turn positively affects the intentions to revisit Crete to savour local agricultural products, recommend and give advice to others to consume local products. Moreover, satisfaction seemed to be the most important dimension together with attitude and subjective norms, whereas perceived behavior control, albeit having a positive and significant effect on behavioral intentions, does not have such a strong impact compared to the other components.

Due to the fact that the first survey took place during the pandemic period, it was decided to make another survey in order to compare the results and see if there are any differences in the profile of tourists who prefer to visit Western Crete during their holidays. According to the results, there was a significant increase of Scandinavian and British tourists at the airport of Chania in 2023 compared to 2021 due to the fact that in the post COVID-19 period there were no serious travel restrictions for health reasons. The majority of tourists were 25-54 years old, with more arrivals of tourists aged 35 years old. There were also more tourists employed in the private and public sector, and fewer students than 2021. The annual average family net income was very high, very close to 80.000 euros, higher than that of 2021, mainly due to the return of Scandinavians and the increase of British, Canadian, American and Australian tourists, who are generally of higher income level.

They spent on average around 825-875 euros per visit of group during their vacations (excluding the expenses for air tickets and accommodation) which is higher than 2021, due to the higher income level of tourists. Half of the tourists had visited Crete before, a higher percentage than 2021, because of the significant increase of Scandinavians who are generally repeaters. Most of them chose to come in Crete directly from their home town mainly through low-cost flights due to the general increase in prices caused by the global geopolitical conditions that prevented a significant number of tourists to travel through the more expensive non low-cost regular charters. The majority of tourists stayed at luxurious hotel accommodations but with a decreased percentage. A significant decrease by one third was recorded for tourists staying in rented villas due to the general price increases. Although there is a decrease in the percentage of tourists who make the travel arrangements alone, it is still high and preferred by more than half of tourists.

Two out of three tourists stated that the gastronomic experiences were important or very important when they choose a destination for their holidays; almost eight out of ten tourists stated that gastronomy was important or very important in the satisfaction of their trip, while two out of three tourists stated that gastronomy was very important as a motivation to travel. Moreover, four out of ten tourists declared that their knowledge on Cretan gastronomy before their visit was at a good and very good level; six out of ten tourists stated that Cretan gastronomy influenced their visit to Crete much or very much; the average rate of tourists' interest in Cretan gastronomy was graded with 7 out of 10 and almost half of the tourists' budget was spent on food during their holidays in Crete, buying more local agricultural products and participating in more food activities.

Furthermore, the vast majority of tourists were much or very much satisfied from the characteristics of the local agricultural products concerning taste, quality, freshness and appearance, and less satisfied with prices and varieties. Three out of ten tourists stated that the local agricultural products were not available at their hotel accommodations, a percentage which is lower than that of 2021; it seems that touristic accommodations are making few steps forward for the promotion of local agricultural products. Finally, nine out of ten tourists expressed the view that Cretan gastronomy met their expectations much or very much, highlighting the very high degree of their satisfaction.

Due to the fact that some dimensions were not included in the first model of the survey that took place in 2021, more factors were included in the next model during the survey that was implemented in 2023 that directly or indirectly influence tourists' behavioral intentions, such as perceived benefits from sustainability, authenticity, trust, marketing, distribution, food involvement, food neophilia and destination image.

Local food consumption value theory together with an augmented Theory of Planned Behavior Model was used, taking into account satisfaction and the food destination image, in order to describe tourists' behavioral intentions. Perceived benefits, food neophilia and food involvement were also examined. It was found that satisfaction was the most influential factor on tourists' behavioral intentions; food destination image could act as a good mediator between satisfaction and intentions. The taste/quality value was the most influential dimension concerning the food consumption values that positively influence tourists'

attitudes towards local food. On the other hand, the prestige value was the only one that negatively affected tourists' attitudes towards local food. Regarding perceived benefits, there is a need to construct a new marketing plan and more convenient distribution channels, whereas food involvement in food activities should be better organized in order to increase tourists' satisfaction. Food neophilia, food involvement, attitudes and subjective norms positively affect tourists' behavioral intentions, apart from perceived behavior control, which was found to have a negative influence on intentions.

A stakeholder analysis also took place in order to have a holistic approach by recording the opinions of regional stakeholders from the educational, public, agricultural, touristic and private sectors to determine the needs and find ways to promote food/gastronomic tourism in the Region of Crete. The results of a SWOT analysis, using the Eisenhower matrix showed that local agricultural products support local economy and jobs, contributing to the economic and social sustainability of Crete; reduce environmental impact or carbon footprints, supporing environmental sustainability as well. They have better taste and are of higher quality than non-local ones; they are made of fresh ingredients, minimally processed, with more natural ingredients, making them healthier; they are consisted of more nutrients; they are authentic and unique, of higher quality, with better food safety and traceability compared to imported ones. The connection with the local producers is direct, effective and based on trust, however prices are not considered to be so low.

The main weaknesses of local agricultural products are the aging of the rural population, the lack of a rural labor force, the high production costs and the abandonment of rural areas especially by young people. Bureaucracy and administrative difficulties, lack of vocational training & information, lack of investment & infrastructure, lack of know-how, unfair trade practices & limited market access, and the small size of agricultural holdings are also significant problems that need urgent actions from stakeholders.

Concerning opportunities, chances for farmers and agribusinesses to increase their competitiveness will come from: tax incentives & financing from the government; the connection between university research departments and the primary sector & agribusiness for the provision of information and education; the reduction of pollutant emissions derived from the directives of the European Union; the increase of employment due to the higher

number of tourists's visits; the strengthening of investment activity and entrepreneurship of small and medium-sized enterprises for the increase of competitiveness; the improvement and modernization of existing infrastructures as well as the creation of new ones to cover the needs of the market; the registration and certification of agricultural products for better promotion and marketing; the diversity of arable land to keep up with the balanced regional development; the encouragement of innovation through business competitions.

Climate change is the most crucial threat not only at the regional but also at the global level, along with other threats that are of utmost importance: inconsistent tactics in the implementation of subsidies between farmers and regions; the increase in the Hellenization of imported products, distorting competition and quality; failure to adapt to insurance regulations; restricted liquidity and restricted funds of agricultural companies to participate in programmes for Renewable Energy Sources; the inability to manage the "red" loans of farmers; the inability to optimize the organization and management of farmers' agricultural land due to lack of knowledge; the import of cheap low-quality agricultural products and the change of consumer habits, which all deteriorate the brand image of the destination and the prospects of the local agricultural products.

Stakeholders agreed to the fact that food tourism contributes significantly to the sustainable development of the Region of Crete, in all three dimensions (economic, social, and environmental). Regarding the impacts of the agricultural sector, stakeholders stated that the most important impacts are the natural environment and culture which constitute advantages for comparative food tourism and agrotourism in the Region, while local traditions and culture, and their connection with the food tourism of the Region, together with the participation of local residents in food tourism development activities, could contribute to the further satisfaction of tourists, which could increase their behavioral intentions to revisit the destination, establishing Crete as a popular food tourism destination. Moreover, concerning the extension of the tourist season, the existence of direct flights during the winter months together with the appropriate promotion of food tourism and the participation of tourists in agrotourism and related activities (olive picking, grape growing, cheese production, etc.) could significantly contribute to the sustainable development of the Region.

The main problems of the promotion of local agricultural products in tourism are: the lack of an organized network for the marketing and distribution of the products, lack of marketing techniques and the lack of a coordinating body to manage that network. Almost all the stakeholders emphasized the potentialities of the collaboration of small-medium tourism enterprises from different sectors and mainly the cooperation of farmers with hotels and restaurants in order to promote their agricultural products and increase their profitability.

Finally, regional stakeholders stated that local agricultural products could be better promoted by having a label. They could be branded under a PDO/PGI label or under the umbrella of the "Crete-Land of values" label. Local agricultural products should be promoted in catering and accommodation facilities, so that tourists could come in direct contact with the authenticity of the products, which is one of the main problems that was revealed from the survey focusing on tourists: most of them could not find the local agricultural products in their hotel accommodations, deteriorating the food image of the destination. The creation of a platform (website, instagram) providing all the necessary information where tourists could learn about the agricultural businesses that provide certified agricultural products and related food activities and could upload their impressions would be of utmost importance.

Visits to farms, olive mills, wineries, dairies and generally to businesses of gastronomic interest should be well organized and provided by an expert guide that could link the product with the history, mythology and traditions in order to increase the satisfaction of tourists and their behavioral intentions, which could lead to the sustainable development of the Region. Marketing techniques, such as advertising, documentaries, exhibitions, cooking lessons and competitions, are crucial as well for the effective promotion of the food destination image and the behavioral intentions of tourists to buy local agricultural products, to revisit the Region and to recommend the destination to friends and relatives, which could lead to the sustainable development of Crete.

9.2 Recommendations

Food tourism is a growing tendency worldwide with specific emphasis on experiencing authentic local foods and taking up related activities at a destination and enhancing environmental awareness, as well as fostering economic and social sustainability as well.

By defining local food and its preference against conventional food; distinguishing the terms "food tourism", "gastronomic tourism", "culinary tourism", and "cuisine"; linking food tourism with different forms of special interest tourism connected with food such as slow food tourism, halal food tourism, street food tourism, gourmet tourism, ethnic food tourism, traditional food tourism, salt tourism, olive oil tourism, beer tourism, wine tourism, agrotourism and green tourism; distinguishing the food service establishments in various categories, such as restaurants, Michelin restaurants, luxury restaurants, 4 & 5 star hotel restaurants, ethnic restaurants, green restaurants, authentic restaurants, hot pot restaurants, pop-up restaurants, upscale restaurants, fast food restaurants, hotels, grocerants, groceries, premium food markets, farmers' markets, food tourism factories, food trucks, breweries, wineries, cellar door tasting rooms, olive oil companies, halal food establishments, universities and festivals; and finally, comprehending food tourism destinations such as historical cities, districts, popular food & wine regions, villages and "gastronomic" countries; the outcomes of this research could act as a guideline for the relative stakeholders, consultants, practitioners, managers, researchers and academicians who are involved in food tourism to better understand the concepts and the interlinkages of the main factors of each category that influence tourists' behavioral outcomes, which would enable them to design, follow and implement the most appropriate strategy.

The United Nations launched 17 Sustainable Development Goals (SDGs) that could be applied in all sectors of every nation (UN, 2015). Food tourism sustainability development refers mainly to economic, socio-cultural and environmental dimensions, taking into account the involvement of tourists and local stakeholders.

Food tourism could contribute quite efficiently to the socio-economic development by promoting the cultural and historical attributes of a destination, through a holistic approach by taking into account tourists' and stakeholders' views as derived from the referred conceptual framework that was developed, which is in line with Kumar (2019) outcomes.

Furthermore, the issues of sustainability should be emphasized since by consuming local food products, economic, social and environmental benefits remained in the local society. With the consumption and purchase of local food products, there are economic benefits that are derived from local producers, food establishments, and generally distributed among the local

society. The positive effect of the increase in tourists' intentions could lead to an increase in the sales and exports of the local products, increase in investments, and increase in the number of tourists in a destination. This economic development results in an increase in employment in the agriculture sector as well as the touristic sector; social aspects are thus well advocated. With the consumption of local traditional food products, cultural aspects also emerge, since tourists could learn about the culture, traditions, the history of the destination, as well as its food, so that the knowledge and culture can be transferred, preserved and protected. Moreover, by consuming local products, there is less CO2 produced in contrast to importing food from other countries; thus, environmental sustainability is supported as well.

Taking into account the opinions of local stakeholders and consumers, the policy makers should promote alternative and local food systems together with conventional systems in the development of rural areas as O'Neill (2014) suggested. A sustainable model of entrepreneurial initiative that reconstructs the territory in such a way that it could be beneficial not only for tourists but also for the local stakeholders and the residents, by respecting the environment, encouraging local youth employment, tightening social relations, maintaining natural resources and promoting cultural heritage could also be promoted based on Sanita (2016) analysis.

By attaining a holistic approach on food tourism management, history, culture, authenticity of a local food product, food service establishment and food destination could be better developed and promoted; tourists would be more motivated to search for local food; to learn about its special attributes; to be actively involved in gastronomic activities, acquiring unique and memorable experiences; to be better able to define and improve their attitude, beliefs, emotions and desires; increase the level of satisfaction towards local food/related activities that will positively affect the intentions to purchase and recommend a food product, revisit and recommend a food service establishment/destination, which could lead to the sustainable development of the area as well (Apak and Gurbuz, 2023; Estrada et al., 2023; Kiralova and Malec, 2021; Leer, 2020).

The empirical findings of the studies provide several insights for food producers, retailers, and destination management organizations that aim to improve the commercial viability and sustainability of local food systems. The outcomes could be used by the relative stakeholders'

destination marketers in order to connect the properties of local food with quality, emotions, authenticity, health, knowledge, history, culture, social bonds and good value for money. The increase in tourists' satisfaction is the main target that the efforts should focused on in order to enhance the food destination image of Crete, attracting more tourists and increasing their behavioral intentions, since satisfaction is the most influential predictor on tourists' intentions in both touristic surveys.

Taste/quality, health, price, emotional, interaction and epistemic value were found to have positive effects on attitude, whereas only prestige value had a negative influence on attitudes towards local food. That means that tourists do not really care about showing off when tasting local foods; there is no snob-effect. They do really care about only the other values.

Regarding the factors that influence satisfaction, only the marketing and distribution dimension was found to have a negative influence, meaning that marketing and distribution of local foods should be better organized in order to increase the satisfaction of tourists; there is a need for the reorientation of the marketing and distribution strategy. Marketing efforts may prioritize authenticity over prestige, avoiding status-based or luxury positioning, because prestige values have a unique negative influence on attitudes. Instead, a promotional focus must remain on authentic, well-crafted, and heritage-based food experiences that resonate with the emotional appeal of the destination.

Concerning product development and quality assurance, stakeholders should prioritize sensory quality given that taste and quality values are identified as the primary determinants of consumer attitude. Ensuring the sensory consistency of local products requires strict quality control standards, in which Destination Marketing Organizations should collaborate with local food stakeholders in order to maintain the high quality of local food offered to foreign tourists. Moreover, the health value of Cretan food products should also be emphasized, by connecting it together with the nutritional properties of the Mediterranean Diet to appeal health-conscious international consumers, as health factors significantly influence positive attitudes towards the local brand. New menus should include dishes and recipes with local food with a good value for money. Information through websites and applications of how and where to find local food products should be made more available to tourists, allowing them to upload their impressions as well. More local food product

activities, such as festival/events, wine routes, olive oil routes, cooking seminars/courses, and agrotourism, should be implemented in order to increase tourists' knowledge and involvement of Cretan food products.

Food destination image was found to play a significant role, since satisfaction of tourists increases the food destination image to a high degree, and a high destination image also has a high degree on the positive intentions of tourists to recommend local food, to find them in their countries and to revisit Crete. Food destination image is very significant in order to achieve a competitive advantage compared with other destinations and increase the arrivals of foreign tourists.

Cretan food products should also be available in the vast majority of hotels and restaurants and other special Cretan food places, at a specific place and on menus, where it could be easily found and tasted by tourists recognizing and appreciating the authenticity of the local foods. In order for the provision of the local food products to be successfully implemented in a food establishment, mutual trust between farmers and owners of food establishments should be enhanced. Promotional campaigns should focus on the emotional appeal to tourists, emphasizing the positive benefits of Cretan gastronomy and the memorable experiences that they will have while eating altogether, by enhancing the family bonds as well as socialization with local people.

To optimize supply chain and distribution strategies, stakeholders must address the current inefficiencies identified by the negative impact of marketing and distribution dimensions on satisfaction. This finding suggests an availability gap that can be bridged by improving the visibility and convenience of local products through their integration into major hotel menus and established retail channels.

The logistical flow required to resolve these gaps involves a coordinated food production chain consisting of production, which involves livestock farming and crop cultivation; processing, which is the transformation of raw materials into standardized food products; distribution, involving storage and transport logistics where current inefficiencies must be mitigated; retail and restaurants, which serve as critical points of sale where products become accessible; and finally, consumers whose satisfaction drives future intentions.

Digital integration is equally vital, and destination management organizations should develop dedicated mobile applications or web platforms providing real-time information on where to purchase authentic items or participate in culinary activities, such as wine and olive oil routes. Producers can capitalize on tourists' readiness to spend more by clearly outlining the social, economic, and environmental advantages of local production. This may become particularly effective because satisfaction is a key driver in purchasing decisions.

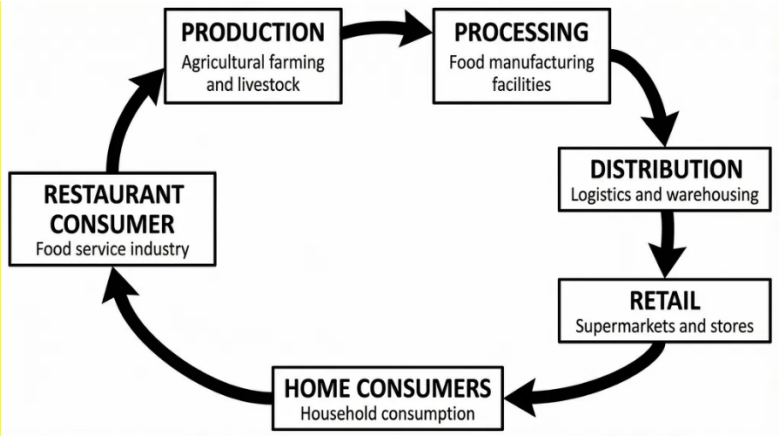


Figure 9.1 The Food Production Chain
Resource: Author's own work

Strengthening inter-sectorial linkages between the agriculture sector and accommodation properties will benefit the corresponding stakeholders and encourage youth employment, which could lead to sustainable tourism development as pinpointed by (Nguyen et al., 2019). Moreover, the relationships among food producers and restaurant owners, attitudes (preferences, past experience), behaviors towards sourcing (order processing time), unique product characteristics and promotional materials play significant roles in the WTP for local food as inputs among the value chain of restaurants as noticed by Sharma et al. (2014), whereas the significance of personal relationships and trust among farmers, producers (sellers) and food distributors, food services (buyers) could contribute to the sustainability of food systems and the maintenance of competitive advantage at the same time as mentioned by Roy et al. (2017).

Furthermore, understanding ongoing changes in tourist drivers over time is crucial and will assist policy makers in the implementation of the appropriate marketing tools that will enhance the satisfaction of tourists and stimulate their intentions to revisit and recommend

the touristic destination. Based on the findings of the stakeholders' survey, successful marketing and management initiatives could be implemented through a well-established cross-sectoral Local Network that could lead to effective coordination, mutual trust and benefits among the stakeholders (De Rosa et al., 2017).

Regional successful marketing techniques of a destination are also in line with other surveys and can be achieved by the establishment of an official website for visitors where they could upload their impressions (Jong and Varley, 2017; Nelson, 2016); the creation of an official governmental Instagram account supporting the new trend of food-stagramming which will advertise unique local food characteristics (Yu and Sun, 2019) that could also be very useful for tourists, since they could share food experiences, attitudes and impressions from a destination that could influence the travel behavior of their followers (Wong et al., 2019); the promotion of annual events with national traditional foods (Jalis et al., 2014); and by the promotion of material emphasizing the unique characteristics of Cretan gastronomy, combined with the culture and history of the area and linking it with the healthy beneficial properties of the Mediterranean Diet.

The existence of direct international flights during winter time and the improvement of the infrastructure, together with the active involvement of local residents with tourists by offering them experiential activities, could lead to the sustainable development of the Region of Crete by the extension of the touristic period, emphasizing the unique economic, cultural and environmental characteristics of local quality agricultural products which is much in line with Lee et al. (2015a).

Finally, the high quality of the local agricultural products of Crete is recognized globally, by the unanimous proclamation of Crete as a "European Region of Gastronomy 2026" by the "International Institute of Gastronomy, Culture, Arts & Tourism" (IGCAT). This could act as a unique opportunity for the sustainable tourism development of the Region to promote Cretan food culture at regional, national and international level that will positively affect tourists' behavioral intentions to consume local agricultural products, (re)visit Crete and recommend it to others, through a well-established cross-sectoral network that will strengthen the image of the Region as a food tourism destination.

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APPENDICES

A. QUESTIONNAIRE - TOURISM SURVEY A

Part 1 – Previous visits to Crete

1. Have you ever visited Crete before?

Please choose only one of the following:

1. Yes
2. No

2. How many times have you visited Crete (including this one)?

Please write your answer here: _____

3. Which area of Crete did you stay?

Please choose only one of the following:

1. Chania
2. Rethymno
3. Heraklio
4. Agios Nikolaos/Sitia (Lasithi)

Part 2 – Your Current visit to Crete

1. Who did you travel to Crete with?

Please choose only one of the following:

1. Alone
2. With my husband/wife (with no children)
3. With my family (with children)
4. With my boyfriend/girlfriend
5. With company, group of friends

2. How did you arrange your holidays?

Please choose only one of the following:

1. Travel Agency/Tour Operator
2. Booked a packaged tour
3. Alone (I made all the arrangements)
4. Other: _____

3. Which type of airline did you arrive at Crete with?

Please choose only one of the following:

1. Direct Low cost flight
2. Direct Non low cost flights (regular charters)
3. Non Direct flights through Athens/Thessaloniki

4. What type of accommodation did you mainly stay at?

Please choose only one of the following:

1. Hotel
2. Rented Apartment/room
3. Rented Villa
4. Friend / family
5. Own house
6. Camping
7. Other: _____

5. What was the accommodation's star rating?

Please choose only one of the following:

1. 1
2. 2
3. 3
4. 4
5. 5
6. Not applicable

6. What type of accommodation arrangement (or package) did you mainly use?

Please choose only one of the following:

1. All-inclusive / Full Board (AI/FB)
2. Half Board (HB)
3. Bed and Breakfast (BB)
4. No package

7. How many days did you stay?

Please choose only one of the following:

1. Less than a week
2. One week
3. Two weeks
4. More than two weeks

Part 3 – Expenditure

1. APART from the TICKET and ACCOMMODATION expenses, how much did you spend during your stay in Crete?

Please choose only one of the following:

1. Less than 250 €
2. Less than 400 €
3. Less than 600 €
4. Less than 750 €
5. Less than 1000 €
6. More than 1000 €

7. More than 1,500 €

2. What percentage of your budget did you spend for food during your vacation??

1. 10%
2. 20%
3. 30%
4. 40%
5. 50%
6. 60%
7. 70%
8. More than 70%

Part 4 Culinary experiences

1. Which of the following local products did you buy during your holiday?

Please choose all that apply:

1. Cretan honey
2. Raki or Tsikoudia
3. Cretan wine
4. Local cheese (feta, graviera, mizithra, etc)
5. Cretan olive oil
6. Local fresh orange juice
7. Traditional rusk bread
8. Vegetables
9. Herbs & Spices

9.1. Please specify: _____

Other: _____

	Not important			Very important
1	2	3	4	5

2. How important was food experiences for your decision to choose Crete?

	Not at all			Absolutely
1	2	3	4	5

3. Did your food experiences in Crete meet your expectations?
4. Where did you consume local products?

Hotel Restaurant Restaurant/Taverna Special Cretan food places Farms Other

5. Were Cretan local products available at your Hotel? Yes, No

	Not satisfied			Very satisfied
1	2	3	4	5

6. Were you satisfied with tavernas/restaurants?
7. Were you satisfied with coffee shops ?

8. Have you participated in food activities?

Festival/events, Wine routes, Olive oil routes, Cooking seminars/courses, Agrotourism Other

Part 5 Cretan local products

	Not satisfied			Very satisfied
	1	2	3	4	5

1. Were you satisfied with freshness of Cretan local products?

2. Were you satisfied with appearance of Cretan local products?

3. Were you satisfied with taste of Cretan local products?

4. Were you satisfied with quality of Cretan local products?

5. Were you satisfied with price of Cretan local products?

6. Were you satisfied with varieties of Cretan local products?

	strongly disagree			strongly agree
	1	2	3	4	5

7. Eating local food products gives pleasure

8. Eating local products in its original place is exciting

9. Eating local products on holiday helps to relax

10. Eating local products evokes memories

11. It is important to me that the local products I eat on holiday look nice/taste good

12. I consume local products because they contain a lot of fresh ingredients produced in a local area

13. Experiencing local products increases my knowledge about different cultures

14. It is valuable for me to consume local products

15. Trying local food while traveling is very important for me

16. Tasting local products in an original place is an authentic experience for me

17. I like to talk to people I respect about my local product experiences

18. Tasting local products enables me to have an enjoyable time with friends/family that are important to me

19. Most people who are important to me think I should consume local food when traveling

20. I am constantly confident to sample new and different food products

21. Whether or not I consume local food when traveling is completely up to me

22. I have time, money, and information to consume unfamiliar local food when traveling

23. I intend to revisit Crete to savour its local products

24. I expect to consume more local food if I have a chance to revisit

25. I want to give advice about local product experiences to people who want to travel

26. I am willing to recommend Cretan local products to others

Part 6 – Profile questions

1. What is your country of residence?

Please choose only one of the following:

1. Austria
2. Australia
3. Armenia
4. Belarus
5. Belgium
6. Bulgaria
7. Canada
8. China
9. Cyprus
10. Croatia
11. Czech Republic
12. Denmark
13. Estonia
14. Finland
15. France
16. Greece
17. Germany
18. Hungary
19. Italy
20. Ireland
21. Israel
22. Latvia
23. Lithuania
24. Luxembourg
25. Netherlands
26. New Zealand
27. Norway
28. Poland
29. Portugal
30. Romania
31. Russia
32. Serbia

33. Slovakia
34. Spain
35. Sweden
36. Switzerland
37. Slovenia
38. Tunisia
39. USA
40. United Arab Emirates
41. United Kingdom
42. Other: _____

2. What is your gender?

Please choose only one of the following:

1. Female
2. Male
3. Prefer not to say

3. What age group do you belong to?

Please choose only one of the following:

1. 16-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65 and over

4. What employment category best describes you?

1. Public employee
2. Private employee
3. Self-employee
4. Retired
5. Student

6. What is your approximate net annual family income (in Euros)?

Please choose only one of the following:

1. Below 18,000
2. 18,000 – 30,000
3. 30,000 – 45,000
4. 45,000 – 60,000
5. 60,000 – 80,000
6. 80,000 – 100,000
7. 120,000 and over

B. QUESTIONNAIRE - TOURISM SURVEY B

Part 1 – Previous visits to Crete

1. Have you ever visited Crete before?

Please choose only one of the following:

1. Yes
2. No

2. How many times have you visited Crete (including this one)?

Please write your answer here: _____

3. When did you last visit Crete last time?

1. Within last 6 months
2. Within last year
3. Within last 2 years
4. Within last 5 years
5. Within last 10 years
6. Longer than 11 years

4. Which area of Crete did you visit last time?

Please choose only one of the following:

1. Chania
2. Rethymno
3. Heraklio
4. Agios Nikolaos/Sitia (Lasithi)

Part 2 – Your Current visit to Crete

1. Who did you travel to Crete with?

Please choose only one of the following:

1. Alone
2. With my partner or husband or wife
3. Child / children aged under 15
4. Child / children aged 15 or older
5. Other family / relative
6. With group of friends
7. With an organised group

2. How did you arrange your holidays?

Please choose only one of the following:

1. Travel Agency
2. Booked a packaged tour
3. Alone (I made all the arrangements)
4. I made some arrangements myself and some via a travel agency
5. Other: _____

3. Which type of airline did you arrive at Crete with?

Please choose only one of the following:

1. Direct Low cost flight
2. Direct Non low cost flights (regular charters)
3. Non Direct flights through Athens/Thessaloniki

4. What type of accommodation did you mainly stay at?

Please choose only one of the following:

1. Hotel
2. Rented Apartment
3. Airbnb or similar type of accommodation
4. Rented Villa (not via Airbnb or similar type of provider)
5. Friend / family
6. Own house
7. Camping
8. Other: _____

5. What was the accommodation's star rating?

Please choose only one of the following:

1. 1
2. 2
3. 3
4. 4
5. 5
6. Not applicable

6. What type of accommodation arrangement (or package) did you mainly use?

Please choose only one of the following:

1. All-inclusive / Full Board (AI/FB)
2. Half Board (HB)
3. Bed and Breakfast (BB)
4. No package (rented villa or apartment or stayed with friends)

Part 3 – Expenditure

1. **APART from the TICKET and ACCOMMODATION expenses, how much did you spend during your stay in Chania / Crete?**

Please choose only one of the following:

1. Less than 250 €
2. 251 - 500 €
3. 501 - 750 €
4. 751 - 1,000 €
5. 1,001 - 1,250 €
6. 1,251 - 1,500 €
7. 1,501 - 2,000 €
8. More than 2,001 €

2. **What percentage of your budget did you spend for food during your vacation?**

1. 10%
2. 20%
3. 30%
4. 40%
5. 50%
6. 60%
7. 70%
8. More than 70%

Part 4 – Cretan Local Products

	strongly disagree			strongly agree
	1	2	3	4	5

1. Emotional value

1a. Eating Cretan food products helps me relax

1b. Eating Cretan food products gives me pleasure.

1c. Eating Cretan food products changes my mood positively

1d. Eating Cretan food products evokes good memories

1e. Eating Cretan food products makes me feel excited

2. Epistemic value

2a. I want to seek out more information about Cretan food products

2b. Eating Cretan food products is a good opportunity for me to learn new things

2c. I want to try more diverse Cretan food products

2d. My knowledge of Cretan food culture has increased

3. Health value

3a. Cretan food products are hygienic and healthy

3b. Cretan food products are safe

3c. Cretan food products provide good nutrition, free of additives

3d. Cretan food products contains a lot of fresh ingredients produced in a local area

3e. Cretan food products can result in beneficial weight gain

4. Prestige value

4a. Eating Cretan food products gives me a chance to show off my Cretan food experiences to others

4b. I have higher social status when eating well-known Cretan food products

4c. It is worth showing pictures of my Cretan food experiences to others

4d. Eating well-known Cretan food products gives me prestige

5. Taste/quality value

5a. Cretan food products provide a variety of ingredients

5b. Cretan food products provide a high standard of quality

5c. Cretan food provide appealing flavors

5d. Cretan food products are tasty

5e. Cretan food products have very good reputation

6. Price value

6a. Cretan food products are reasonably priced

6b. Cretan food products offer value for money

7. Interaction value

7a. Eating Cretan food products increases family and friendship bonds

7b. I always like to mix with the local people and experience the local customs.

7c. I like to talk and transmit my local food experience to everybody

7d. I want to give advice about Cretan food product experiences to people who want to travel

8. Food neophilia

8a. I am constantly sampling new and different food products

8b. I love to try recipes from foreign countries.

9. Food involvement

9a. I like to join cooking classes on my trips if possible.

9b. I like to read food blogs on the Internet.

9c. I like to join food events/festivals.

9d. I like to participate in wine and / or olive oil routes

10. Perceived behavior control

10a. Whether or not I consume unfamiliar local food when traveling is completely up to me.

10b. I am confident that if I want, I can consume unfamiliar local food when traveling.

10c. I have time, money, and information to consume unfamiliar local food when traveling

11. Subjective norms

11a. Most people who are important to me think I should consume unfamiliar local food when traveling.

11b. The expectation is that I should consume unfamiliar local food when traveling.

11c. People whose opinions I value would prefer that I consume unfamiliar local food when traveling.

12. Food destination image

12a. Crete, as a tourism destination, provides rich food culture

12b. Crete, as a tourism destination, provides diverse food

12c. Crete, as a tourism destination, provides delicious food

12d. Crete, as a tourism destination, provides unique food

12e. Crete, as a tourism destination, is a friendly city suitable for culinary tourism

13. Intentions

13a. I will recommend Cretan food products to families and/or friends

13b. I would like to find Cretan food products in my country

13c. I would like to revisit Crete for food tourism to savour its local food products

13d. All other attributes being equal, I am willing to pay more for locally produced food items

13e. I would be willing to spend more on food products that are less environmentally harmful

14. Satisfaction with tasting local food

14a. I am satisfied with Cretan food as I expected

14b. Eating Cretan food is a wise choice

14c. I am happy about my decision to experience Cretan food

15. Attitude toward local food

15a. My attitude towards local food is good

15b. My attitude towards local food is good and pleasant

15c. My attitude towards local food is good and positive

15d. My attitude towards local food is good and favorable

15e. My attitude towards local food is good and valuable

16. Sustainability

16a. Food tourism in Crete can be considered as economically sustainable

16b. Food tourism in Crete can be considered as environmentally sustainable

16c. Food tourism in Crete can be considered as socially sustainable

16d. Supports local economy, jobs

16e Increases the welfare of the local people

16f. Supports local small producers and retailers

16g. Are produced in an environmentally friendly way

16h. Reduce environmental impact or carbon footprint

16i. Have less transport miles and time from the restaurant

17. Authenticity and Trust

17a. Enhance trust to producers or growers

17b. Are Special, unique

17c. Provide greater food safety or traceability

17d. Are more authentic, better crafted foods

17e. Tasting Cretan food in its original place is an authentic experience

17f. I learned Crete dining habits through my Cretan food experiences

18. Marketing and Distribution

18a. Are seasonal foods with limited availability

18b. Are widely available

18c. Are branded and easily recognizable as local

18d. Are promoted nationally

18e. Are well labelled

18f. Are well packaged

18g. Cretan food is convenient to eat

18h. Cretan food is convenient to buy

Part 5 Culinary experiences

1. Which of the following local products did you buy during your holiday?

Please choose all that apply:

1. Cretan honey
2. Raki or Tsikoudia
3. Cretan wine
4. Local cheese (feta, graviera, mizithra, etc)
5. Cretan olive oil
6. Local fresh orange juice
9. Traditional rusk bread
10. Vegetables
11. Herbs & Spices

Other, Please specify: _____

Not important Very important

1 2 3 4 5

2. How important is gastronomy as a motivation to travel?

3. How important is gastronomy in the satisfaction of your trip?

4. How important are the gastronomic experiences when you choose a destination for your trip?

Not at all Absolutely

1 2 3 4 5

5. Did your food experiences in Crete meet your expectations?

Not knowledge Full of knowledge

1 …….. 10

6. How would you rate your knowledge on Cretan gastronomy before you visit Crete?

Not interest Very interest

1 …….. 10

7. How would you rate your interest in Cretan gastronomy? 1 (Not interest at all)…10 (very interest)

Not at all Very much

1 …….. 5

8. How much has Cretan gastronomy influenced your visit to Crete?
9. Where did you consume local products?

Hotel Restaurant Restaurant/Taverna Special Cretan food places Farms Other

10. Were Cretan local products available at your Hotel? Yes, No

Not satisfied Very satisfied

1 …….. 5

11. Were you satisfied with the following characteristics of Cretan local products? Freshness, Appearance, Taste, Quality, Price, Varieties
12. Have you participated in food activities?

Festival/events, Wine routes, Olive oil routes, Cooking seminars/courses, Agrotourism Other

Part 6 – Profile questions

1. What is your country of residence?

Please choose only one of the following:

1. Austria
2. Australia
3. Armenia
4. Belarus
5. Belgium
6. Bulgaria
7. Canada
8. China
9. Cyprus
10. Croatia
11. Czech Republic
12. Denmark
13. Estonia
14. Finland
15. France
16. Greece
17. Germany
18. Hungary
19. Italy
20. Ireland
21. Israel
22. Latvia
23. Lithuania
24. Luxembourg
25. Netherlands
26. New Zealand

27. Norway
28. Poland
29. Portugal
30. Romania
31. Russia
32. Serbia
33. Slovakia
34. Spain
35. Sweden
36. Switzerland
37. Slovenia
38. Tunisia
39. USA
40. United Arab Emirates
41. United Kingdom
42. Other: _____

2. What is your gender?

Please choose only one of the following:

1. Female
2. Male
3. Prefer not to say

3. What age group do you belong to?

Please choose only one of the following:

1. 16-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75 or over

4. What is your marital status?

1. Single
2. Married
3. Widowed
4. Divorced / separated

5. What is your education level?

1. Primary school
2. Secondary school
3. High school
4. University – Bachelor's
5. University – Postgraduate

6. What category best describes you?

1. In full-time employment
2. In part-time employment
3. Self-employed
4. Unemployed
5. Retired
6. Housewife / husband
7. Student (working part-time)
8. Student (not employed)
9. Other: _____

6. What is your approximate net annual family income (in Euros)?

Please choose only one of the following:

1. Below 10,000
2. 10,001 – 20,000
3. 20,001 – 30,000
4. 30,001 – 40,000
5. 40,001 – 50,000
6. 50,001 – 60,000
7. 60,001 – 70,000
8. 70,001 – 80000
9. 80,001 – 90,000
10. 90,001 – 100,000
11. 100,001 – 120,000
12. 120.001 – 150.000
13. 150.001 – 180.000
14. 180.001 – 200.000
15. 200.001 and over

C. OUTPUT - TOURISM SURVEY B

Dimension	***Questions/Variables***	***Mean***	***Std. Deviation***	***Skewness***	***Kurtosis***
Emotional value	Eating Cretan food products helps me relax (FTS01_SQ001)	3.860338	1.014664	-.6491931	2.9906
	Eating Cretan food products gives me pleasure (FTS01_SQ002)	4.363949	.8339812	-1.4658	5.385876
	Eating Cretan food products changes my mood positively (FTS01_SQ003)	4.029302	.9467141	-.810282	3.350069
	Eating Cretan food products evokes good memories (FTS01_SQ004)	4.139368	1.04476	-1.233266	4.014794
	Eating Cretan food products makes me feel excited (FTS01_SQ005)	3.678571	1.140047	-.5621043	2.599945
Epistemic value	I want to seek out more information about Cretan food products (FTS02_SQ001)	3.266417	1.181896	-.2132539	2.308521
	Eating Cretan food products is a good opportunity for me to learn new things (FTS02_SQ002)	3.859942	1.062196	-.7856929	3.054898
	I want to try more diverse Cretan food products (FTS02_SQ003)	3.953616	1.049157	-.8957858	3.28136
	My knowledge of Cretan food culture has increased (FTS02_SQ004)	3.965408	.9956435	-.856448	3.314299
Health value	Cretan food products are hygienic and healthy (FTS03_SQ001)	3.966878	.8893219	-.6112618	3.10765
	Cretan food products are safe (FTS03_SQ002)	4.224755	.8311948	-.9793717	3.903558
	Cretan food products provide good nutrition, free of additives (FTS03_SQ003)	4.040462	.8910488	-.6823701	3.124604
	Cretan food products contain a lot of fresh ingredients produced in a local area (FTS03_SQ004)	4.370049	.7973237	-1.381861	5.260499
	Cretan food products can result in beneficial weight gain (FTS03_SQ005)	3.476865	1.036595	-.2187371	2.582298
Prestige value	Eating Cretan food products gives me a chance to show off my Cretan food experiences to others	3.332077	1.218365	-.3164904	2.253328

Dimension	*Questions/Variables*	*Mean*	*Std. Deviation*	*Skewness*	*Kurtosis*
	(FTS04_SQ001)				
	I have higher social status when eating well-known Cretan food products (FTS04_SQ002)	2.438882	1.189983	.4162714	2.361281
	It is worth showing pictures of my Cretan food experiences to others (FTS04_SQ003)	3.380536	1.281328	-.3813133	2.132524
	Eating well-known Cretan food products gives me prestige (FTS04_SQ004)	2.446163	1.2252	.4207952	2.290269
Taste quality	Cretan food products provide a variety of ingredients (FTS05_SQ001)	3.959357	.9090476	-.6395149	3.081279
	Cretan food products provide a high standard of quality (FTS05_SQ002)	4.043146	.8430326	-.6991799	3.464318
	Cretan food products provide appealing flavors (FTS05_SQ003)	4.246921	.8443022	-1.129678	4.306141
	Cretan food products are tasty (FTS05_SQ004)	4.416031	.7848576	-1.53471	5.817649
	Cretan food products have a very good reputation (FTS05_SQ005)	4.040882	.8835254	-.6274312	2.986975
Price value	Cretan food products are reasonably priced (FTS06_SQ001)	3.886604	.9012723	-.5342038	2.966362
	Cretan food products offer value for money (FTS06_SQ002)	4.028269	.8790285	-.6872587	3.184274
Interaction value	Eating Cretan food products increases family and friendship bonds (FTS07_SQ001)	3.47598	1.122283	-.4187441	2.601267
	I always like to mix with the local people and experience the local customs (FTS07_SQ002)	4.010056	1.009666	-.9101625	3.340761
	I like to talk and transmit my local food experience to everybody (FTS07_SQ003)	3.422301	1.197823	-.3482929	2.274521
	I want to give advice about Cretan food product experiences to people who want to travel (FTS07_SQ004)	3.417288	1.224111	-.3881165	2.26898
Food	I am constantly sampling new and different food products	3.782113	1.076176	-.6099229	2.685481

Dimension	*Questions/Variables*	*Mean*	*Std. Deviation*	*Skewness*	*Kurtosis*
neophilia	(FTS08_SQ001)				
	I love to try recipes from foreign countries (FTS08_SQ002)	4.088182	1.050206	-1.059254	3.453163
Food involvement	I like to join cooking classes on my trips if possible (FTS9_SQ001)	2.266124	1.344044	.7327836	2.315395
	I like to read food blogs on the Internet (FTS9_SQ002)	2.53565	1.4105	.432694	1.876325
	I like to join food events/festivals (FTS9_SQ003)	2.86435	1.37126	.0580641	1.785852
	I like to participate in wine and/or olive oil routes (FTS9_SQ004)	3.069486	1.400041	-.1382461	1.768669
Perceived behavior control	Whether or not I consume unfamiliar local food when traveling is completely up to me (FTS10_SQ001)	4.105711	.9831786	-.941651	3.404339
	I am confident that if I want, I can consume unfamiliar local food when traveling (FTS10_SQ002)	4.208219	.9262675	-1.083636	3.805239
	I have time, money, and information to consume unfamiliar local food when traveling (FTS10_SQ003)	4.075656	.9496377	-.8568007	3.27895
Subjective norms	Most people who are important to me think I should consume unfamiliar local food when travelling (FTS11_SQ001)	3.42065	1.178187	-.4141668	2.493725
	The expectation is that I should consume unfamiliar local food when travelling (FTS11_SQ002)	3.51142	1.184908	-.5311338	2.579825
	People whose opinions I value would prefer that I consume unfamiliar local food when travelling (FTS11_SQ003)	3.261662	1.248655	-.3091844	2.244348
Food destination image	Crete, as a tourism destination, provides rich food culture (FTS12_SQ001)	4.16435	.8902309	-.9343425	3.543686
	Crete, as a tourism destination, provides diverse food (FTS12_SQ002)	4.055469	.9318154	-.7792815	3.092296
	Crete, as a tourism destination, provides delicious food	4.353488	.8255052	-1.28066	4.552718

Dimension	*Questions/Variables*	*Mean*	*Std. Deviation*	*Skewness*	*Kurtosis*
	(FTS12_SQ003)				
	Crete, as a tourism destination, provides unique food (FTS12_SQ004)	3.942839	.9677013	-.6203117	2.805784
	Crete, as a tourism destination, is a friendly city suitable for culinary tourism (FTS12_SQ005)	4.247752	.8593823	-1.058584	3.895587
Intention	I will recommend Cretan food products to families and/or friends (FTS13_SQ001)	4.205352	.9208428	-1.12033	3.921767
	I would like to find Cretan food products in my country (FTS13_SQ002)	3.985028	1.050263	-.860684	3.100745
	I would like to revisit Crete for food tourism to savour its local food products (FTS13_SQ003)	3.856027	1.161529	-.7852075	2.772108
	All other attributes being equal, I am willing to pay more for locally produced food items (FTS13_SQ004)	3.768438	1.018646	-.6594079	3.025299
	I would be willing to spend more on food products that are less environmentally harmful (FTS13_SQ005)	3.931704	1.016799	-.8506353	3.362702
Satisfaction	I am satisfied with Cretan food as I expected (FTS14_SQ001)	4.289556	.8492708	-1.254684	4.648651
	Eating Cretan food is a wise choice (FTS14_SQ002)	4.182388	.8958018	-.938615	3.477685
	I am happy about my decision to experience Cretan food (FTS14_SQ003)	4.385364	.8203656	-1.357795	4.749852
Attitude	My attitude towards local food is good (FTS15_SQ001)	4.417873	.7944299	-1.443822	5.193479
	My attitude towards local food is good and pleasant (FTS15_SQ002)	4.376028	.8173814	-1.324207	4.705825
	My attitude towards local food is good and positive (FTS15_SQ003)	4.40626	.7935054	-1.358346	4.830751
	My attitude towards local food is good and favorable (FTS15_SQ004)	4.361534	.8259826	-1.298762	4.592266

Dimension	*Questions/Variables*	*Mean*	*Std. Deviation*	*Skewness*	*Kurtosis*
	My attitude towards local food is good and valuable (FTS15_SQ005)	4.283001	.8554481	-1.092591	3.883719
Sustainability	Food tourism in Crete can be considered as economically sustainable (FTS16_SQ001)	3.779715	.9162629	-.3204703	2.734828
	Food tourism in Crete can be considered as environmentally sustainable (FTS16_SQ002)	3.671537	.9659552	-.3310995	2.820366
	Food tourism in Crete can be considered as socially sustainable (FTS16_SQ003)	3.830357	.9116909	-.3109341	2.633667
	Supports local economy, jobs (FTS16_SQ004)	4.407982	.7985488	-1.3689	4.853109
	Increases the welfare of the local people (FTS16_SQ005)	4.364272	.8106101	-1.22779	4.304829
	Supports local small producers and retailers (FTS16_SQ006)	4.434424	.7885998	-1.404246	4.865425
	Is produced in an environmentally friendly way (FTS16_SQ007)	3.934866	.9373053	-.4335554	2.534411
	Reduces environmental impact or carbon footprint (FTS16_SQ008)	3.920843	.9836416	-.5539061	2.731143
	Has fewer transport miles and time from the restaurant (FTS16_SQ009)	4.214217	.9066868	-1.007067	3.591998
Authenticity and trust	Enhance trust to producers or growers (FTS17_SQ001)	4.182631	.8717752	-.830634	3.225303
	Are special, unique (FTS17_SQ002)	4.058259	.9077524	-.6441018	2.854055
	Provide greater food safety or traceability (FTS17_SQ003)	3.953481	.9415278	-.4980896	2.62599
	Are more authentic, better crafted foods (FTS17_SQ004)	4.108905	.8869036	-.7019398	2.980916
	Tasting Cretan food in its original place is an authentic experience (FTS17_SQ005)	4.304543	.8667019	-1.29381	4.600043
	I learned Cretan dining habits through my Cretan food experiences (FTS17_SQ006)	3.620803	1.12266	-.5411943	2.645446

Dimension	*Questions/Variables*	*Mean*	*Std. Deviation*	*Skewness*	*Kurtosis*
Marketing distribution	Are seasonal foods with limited availability (FTS18_SQ001)	3.948447	.9403579	-.5607906	2.857198
	Consuming Local food products [Are widely available] (FTS18_SQ002)	3.784018	.9557873	-.3257276	2.569895
	Consuming Local food products [Are branded and easily recognizable as local] (FTS18_SQ003)	3.726807	1.013302	-.38651	2.584021
	Consuming Local food products [Are promoted nationally] (FTS18_SQ004)	3.607258	1.002194	-.1712146	2.561166
	Consuming Local food products [Are well labelled] (FTS18_SQ005)	3.647946	1.011141	-.2544831	2.488669
	Consuming Local food products [Are well packaged] (FTS18_SQ006)	3.766645	.9809071	-.3324322	2.560797
	Cretan food is convenient to eat (FTS18_SQ007)	4.107111	.8586754	-.7218378	3.175115
	Cretan food is convenient to buy (FTS18_SQ008)	3.937181	.9256599	-.5713852	2.916954

D. QUESTIONNAIRE – REGIONAL STAKEHOLDERS' SURVEY

SWOT analysis

✓ Please select the importance and urgency of the characteristics of local agricultural products, from 1 (Not at all) to 5 (Very much).

STRENGHTS

- They support the local economy and jobs

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- They support the community and local businesses

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- The environmental impact or carbon footprint is reduced

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- They are fresh ingredients, minimally processed, with more natural ingredients

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- They have better taste and quality

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Prices are lower

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- They are healthier and have more nutrients

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- There is better food safety and traceability

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- They are more authentic and unique

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- There is a better connection and trust with local producers

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

✓ Please select the importance and urgency of the weaknesses in the production of local agricultural products, from 1 (Not at all) to 5 (Very much).

WEAKNESSES

- Small size of agricultural holdings

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Shortages of labor in rural areas

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Aging of the rural population and lack of young people

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Abandonment of rural areas

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Lack of vocational training and information

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Lack of investment and infrastructure

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Lack of know-how

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Bureaucracy and Administrative Difficulties

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Unfair Trade Practices and Limited Access to Markets

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- High production costs, especially of energy, oil, fertilizers and animal feed

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

✓ Please select the importance and urgency of the opportunities for the production of local agricultural products, from 1 (Not at all) to 5 (Very much).

OPPORTUNITIES

- Balanced regional development with diversity of arable land (restructuring)

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Increase in employment

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Strengthening the competitiveness of enterprises

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Environmental protection, reduction of pollutant emissions

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Strengthening the investment activity and entrepreneurship of small and medium-sized enterprises

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Connecting university research departments with the primary sector and agricultural enterprises

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Tax incentives & financing to optimize the allocation of resources between crops

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Information, training, mobilization & introduction and reward of innovation through business competitions

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Registration and certification of agricultural products and their standardization and marketing processes

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Improvement and modernization of existing infrastructure as well as the creation of new ones

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- ✓ Please select the importance and urgency of the threats to local agricultural production, from 1 (Not at all) to 5 (Very much)

THREATS

- Increase of cheap imported agricultural products that distort competition

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Marginalization of farmers, livestock farmers, cooperatives, groups, and processing from the possibility of using RES

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Failure to adapt with the insurance regulations and the absence of elementary preparation for the increasing losses

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Wrong tactics in the implementation of subsidies, resulting in little protection and unequal treatment between regions and producers

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Lack of elementary functioning of the banking system and lack of liquidity

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Failure to deal with bad loans of farmers, livestock farmers and poultry farmers

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Irrational organization and management of agricultural plots

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Climate Change

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Import of cheap low-quality agricultural products

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

- Changes in consumer standards (fast food)

	1: Not at all	2	3	4	5: Very much
Important					
Urgent					

✓ What do you think are the problems that hinder the promotion of local agricultural products in tourism?

PROBLEMS

- Lack of a coordinating body

	1: Not at all	2	3	4	5: Very much
Important					

- Lack of cooperation and trust between local businesses

	1: Not at all	2	3	4	5: Very much
Important					

- Lack of marketing techniques of products

	1: Not at all	2	3	4	5: Very much
Important					

- Lack of an organized network for the marketing and distribution of products

	1: Not at all	2	3	4	5: Very much
Important					

- Limited supply of seasonal agricultural products

	1: Not at all	2	3	4	5: Very much
Important					

- High prices in relation to imported products

	1: Not at all	2	3	4	5: Very much
Important					

- Creation of agreements with other large businesses outside the region and territory

	1: Not at all	2	3	4	5: Very much
Important					

✓ Do you think that small and medium-sized tourism businesses could collaborate to offer combined tourism packages?

Yes
No

✓ If you answered "Yes" to the previous question, what sectors could these businesses be from? (multiple answers)

Farmers
Hotels
Restaurants
Travel agents/offices
Municipal/Public authorities
Academic/Research Institutes
Transportation/Rental vehicles
Tour Guides
Other Tourism/Cultural Enterprises
RES and environmental enterprises

✓ Would you be interested in participating in this type of network?

Yes
No

✓ How could local agricultural products be promoted to tourists?

Please select the degree to which you agree or disagree with the following statements regarding the promotion of local agricultural products to tourists:

- Exhibitions taking place in Greece or abroad

	1: Not at all	2	3	4	5: Very much
Agree					

- Cooking competitions based on the island's local agricultural products

	1: Not at all	2	3	4	5: Very much
Agree					

- Advertising agricultural products with tourist content

	1: Not at all	2	3	4	5: Very much
Agree					

- The creation of an institution, an annual agri-food exhibition, which takes place every year in Crete

	1: Not at all	2	3	4	5: Very much
Agree					

- Documentaries for the promotion of local agricultural products

	1: Not at all	2	3	4	5: Very much
Agree					

- Advertising spots, which are broadcast from time to time on well-known television channels

	1: Not at all	2	3	4	5: Very much
Agree					

- Visits to farms, olive mills, wineries, dairies and generally to businesses of gastronomic interest

	1: Not at all	2	3	4	5: Very much
Agree					

- Creation of a platform where tourists can learn about local agricultural businesses and local agricultural products

	1: Not at all	2	3	4	5: Very much
Agree					

- Promotion of local agricultural products in catering and accommodation facilities

	1: Not at all	2	3	4	5: Very much
Agree					

- Branding on all local agricultural products (label)

	1: Not at all	2	3	4	5: Very much
Agree					

✓ **IMPACT OF THE AGRICULTURAL SECTOR ON TOURISM**

Please select the extent to which you agree or disagree with the following statements regarding the impact of the agricultural sector on tourism:

- Crete is a popular food tourism destination

	1: Not at all	2	3	4	5: Very much
Agree					

- With the appropriate promotion of food tourism and the participation of tourists in agrotourism and related activities (olive picking, grape growing, cheese production, etc.), the tourist season could be extended to the winter months

	1: Not at all	2	3	4	5: Very much
Agree					

- The existence of airlines during the winter months could contribute to the extension of the tourist season

	1: Not at all	2	3	4	5: Very much
Agree					

- The natural environment and culture constitute a comparative food tourism and agrotourism advantage of the region

	1: Not at all	2	3	4	5: Very much
Agree					

- The Cretan diet and the quality of local agricultural products contribute significantly to attracting tourists

	1: Not at all	2	3	4	5: Very much
Agree					

- Consumption of local agricultural products contributes to the development of knowledge and sociability as well as to the health of tourists

	1: Not at all	2	3	4	5: Very much
Agree					

- Local tradition and culture and their connection with the food tourism of the region contribute to the highest level of satisfaction of tourists

	1: Not at all	2	3	4	5: Very much
Agree					

- There are a numerous of agrotourism and food tourism activities in the region

	1: Not at all	2	3	4	5: Very much
Agree					

- Infrastructure (road network, signage) and access are at a satisfactory level in the region

	1: Not at all	2	3	4	5: Very much
Agree					

- The participation of local residents in food tourism development activities could contribute to further satisfaction of tourists

	1: Not at all	2	3	4	5: Very much
Agree					

✓ **IMPACT OF FOOD TOURISM ON AGRICULTURE**

Please select the degree to which you agree or disagree with the following statements regarding the impact of food tourism on the agricultural sector

- Food tourism contributes to the sustainability of the region

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism improves the income level of the region

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism increases sales of local agricultural products in the region

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism increases employment for local residents of rural areas

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism protects the environment by following environmentally friendly production processes

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism is an incentive for improving the level of knowledge, skills and competences of those involved

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism acts as a deterrent to the abandonment of the countryside

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism increases agricultural land use

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism has a positive effect on the culture of the local residents

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

- Food tourism overall, benefits the agricultural sector of the region

	1: Not at all	**2**	**3**	**4**	**5: Very much**
Agree					

E. LIST OF REGIONAL STAKEHOLDERS

REGIONAL STAKEHOLDERS	
PUBLIC AUTHORITIES	**REGIONAL UNIT**
REGIONAL UNIT OF CHANIA	CHANIA
MUNICIPALITY OF CHANIA	CHANIA
MUNICIPALITY OF PLATANIA	CHANIA
CHANIA CHAMBER OF COMMERCE AND INDUSTRY	CHANIA
FEDERATION OF PROFESSIONAL CRAFTSMEN AND TRADERS OF CHANIA	CHANIA
CHANIA FOREST DIRECTORATE	CHANIA
PAYMENT AUTHORITY OF COMMON AGRICULTURAL POLICY AID SCHEMES OF CHANIA	CHANIA
REGIONAL UNIT OF RETHYMNON	RETHYMNON
MUNICIPALITY OF RETHYMNON	RETHYMNON
MUNICIPALITY OF ANOGEIA	RETHYMNON
RETHYMNON CHAMBER OF COMMERCE AND INDUSTRY	RETHYMNON
FEDERATION OF PROFESSIONAL CRAFTSMEN AND TRADERS OF RETHYMNON	RETHYMNON
REGIONAL UNIT OF HERAKLION	HERAKLION
MUNICIPALITY OF HERAKLION	HERAKLION
MUNICIPALITY OF HERSONISSOS	HERAKLION
HERAKLION CHAMBER OF COMMERCE AND INDUSTRY	HERAKLION
FEDERATION OF PROFESSIONAL CRAFTSMEN AND TRADERS OF HERAKLION	HERAKLION
PAYMENT AUTHORITY OF COMMON AGRICULTURAL POLICY AID SCHEMES OF HERAKLION	HERAKLION
REGIONAL UNIT OF LASITHI	LASITHI
MUNICIPALITY OF AGIOS NIKOLAOS	LASITHI
MUNICIPALITY OF IERAPETRA	LASITHI
MUNICIPALITY OF SITIAS	LASITHI
LASITHI CHAMBER OF COMMERCE AND INDUSTRY	LASITHI
FEDERATION OF PROFESSIONAL CRAFTSMEN AND TRADERS OF LASITHI	LASITHI
ECONOMIC CHAMBER OF WESTERN CRETE	WESTERN CRETE
ECONOMIC CHAMBER OF EASTERN CRETE	EASTERN CRETE
REGIONAL TOURISM SERVICE OF CRETE	CRETE
AGRONUTRITIONAL COOPERATION OF REGION OF CRETE	CRETE
ASSOCIATION OF CRETAN OLIVE MUNICIPALITIES	CRETE
ORGANIZATION FOR THE DEVELOPMENT OF CRETE	CRETE
EDUCATIONAL/RESEARCH INSTITUTES	**REGIONAL UNIT**
TECHNICAL UNIVERSITY OF CRETE	CHANIA

MEDITERRANEAN AGRONOMIC INSTITUTE OF CHANIA	CHANIA
ORTHODOX ACADEMY OF CRETE	CHANIA
MEDITERRANEAN AGROFOOD COMPETENCE CENTER	HERAKLION
ADVANCED (HIGHER) SCHOOL OF TOURISM EDUCATION OF CRETE	LASITHI
UNIVERSITY OF CRETE	CRETE
HELLENIC MEDITERRANEAN UNIVERSITY	CRETE
EDUCATIONAL DEVELOPMENT "PLOIGOS"	CRETE
GREEK AGRICULTURAL ORGANISATION "DIMITRA"	CRETE
INSTITUTE OF ECONOMIC ANALYSIS, ENTREPRENEURSHIP AND TOURISM	CRETE
CLUSTER AIM-HQ OIL	CRETE
OBSERVATORY OF INNOVATIVE ENTREPRENEURSHIP OF CRETE REGION	CRETE
TOURISM SECTOR	**REGIONAL UNIT**
CHANIA HOTELS ASSOCIATION	CHANIA
UNION OF TOURIST ACCOMMODATION OWNERS OF KISSAMOS	CHANIA
FEDERATION OF RENTAL ACCOMMODATION ENTEPRENEURS OF CHANIA "APTERA"	CHANIA
PALAIOHORA RENTAL ROOMS AND APARTMENTS ASSOCIATION	CHANIA
CHANIA CATERING ENTEPRENEURS ASSOCIATION	CHANIA
CHANIA HOTEL STAFF ASSOCIATION	CHANIA
CHANIA CIVIL AVIATION AUTHORITY	CHANIA
VAMOS VILLAGE	CHANIA
RETHYMNON HOTELS ASSOCIATION	RETHYMNON
UNION OF TOURIST ACCOMMODATION OF RETHYMNON	RETHYMNON
SOUTHERN RETHYMNON HOTELS ASSOCIATION	RETHYMNON
RETHYMNON CATERING ASSOCIATION	RETHYMNON
ONEIRO KOSMOS HOTEL	RETHYMNON
ARISTEA HOTEL	RETHYMNON
IKONES SEAFRONT LUXURY SUITES	RETHYMNON
HERAKLION HOTELS ASSOCIATION	HERAKLION
HERAKLION HOTEL STAFF ASSOCIATION	HERAKLION
AMMOS BEACH HOTEL	HERAKLION
LEONTARAKIS HOTEL	HERAKLION
SEASIDE HOTEL	HERAKLION
CANDIA MARIS HOTEL	HERAKLION
LASSITHI HOTELS ASSOCIATION	LASITHI
SITIA HOTELS ASSOCIATION	LASITHI
PALAIKASTROS APARTMENTS FOR RENT	LASITHI
CLUSTER OF TRADITIONAL GUESTHOUSES "BASILIKATA"	LASITHI
SITIA CATERING AND ENTERTAINMENT ASSOCIATION	LASITHI

MARE BLUE CRETE HOTEL	LASITHI
MIRABELLA HOTEL	LASITHI
CORIVA BEACH HOTEL	LASITHI
TYLISSOS BEACH HOTEL	LASITHI
VILLA KATERINA	LASITHI
TOURISM OBSERVATORY OF WESTERN CRETE	WESTERN CRETE
WESTERN CRETE BUS OWNERS ASSOCIATION	WESTERN CRETE
FEDERATION OF TOURIST ACCOMMODATIONS OF EASTERN CRETE "KNOSSOS"	EASTERN CRETE
PANCRETIAN HOTEL MANAGERS ASSOCIATION	CRETE
ASSOCIATION OF CRETAN TRAVEL & TOURISM AGENCIES	CRETE
PROFESSIONAL TOURIST GUIDE ASSOCIATION OF CRETE & THERA	CRETE
TOURISM PROFESSIONALS ASSOCIATION	CRETE
GUIDE	CRETE
GUIDE	CRETE
GUIDE	CRETE
GUIDE	CRETE
GUIDE	CRETE
GUIDE	CRETE
GUIDE	CRETE
GUIDE	CRETE
HOTEL	NOT DECLARED
HOTEL	NOT DECLARED
AGRICULTURAL SECTOR	**REGIONAL UNIT**
CENTRAL UNION OF CHANIA	CHANIA
UNION OF AGRICULTURAL COOPERATIVES OF KISSAMOS	CHANIA
CHANIA RAISIN UNION	CHANIA
AGRICULTURAL COOPERATIVE OF SFAKIA	CHANIA
AGRICULTURAL COOPERATIVE ORGANISATION OF PRODUCERS OF CITRUS FRUIT AND SUBTROPICAL OF CHANIA "KORMOS"	CHANIA
AGRICULTURAL COOPERATIVE OF GARDENING GREENHOUSE PRODUCERS OF ELAFONISIOU CHRYSOSKALITISSAS	CHANIA
COOPERATIVE OF PRODUCERS-CONSUMERS OF ORGANIC PRODUCTS "GAIA"	CHANIA
AGRICULTURAL COOPERATIVE OF ORGANIC PRODUCTS PRODUCERS OF CHANIA	CHANIA
SYNERGATIKI SA (STANDARDIZATION AND TRADE OF CITRUS FRUIT)	CHANIA
CHANIA OLIVE OIL MILL OWNERS ASSOCIATION	CHANIA
WOMEN'S AGRICULTURAL COOPERATIVE OF PALAIA ROUMATA "ARCHONTISSA"	CHANIA
GROUP OF GARDEN PRODUCTS OF FALASSARNA-CHANIA	CHANIA

VOUVES OLIVE MUSEUM	CHANIA
MILLS OF CRETE	CHANIA
BOTANICAL GARDEN OF CRETE	CHANIA
BIOLEA ASTRIKAS ESTATE	CHANIA
TERRA CRETA	CHANIA
MANOYSAKIS WINERY	CHANIA
ETANAP SAMARIA	CHANIA
AGRICULTURAL COOPERATIVE OF RETHYMNON	RETHYMNON
AGRICULTURAL COOPERATIVE OF EPISKOPI	RETHYMNON
AGRICULTURAL COOPERATIVE OF MYLOPOTAMOS	RETHYMNON
RETHYMNON BEEKEEPING ASSOCIATION	RETHYMNON
PANORMOS CULTURAL COMPANY "EPIMENIDIS"	RETHYMNON
THE SHEPHERD'S HOUSE	RETHYMNON
AGRICULTURAL UNION OF COOPERATIVES OF HERAKLION	HERAKLION
PEZA UNION	HERAKLION
AGRICULTURAL OLIVE OIL COOPERATIVE OF KROUSONA	HERAKLION
AGRICULTURAL COOPERATIVE OF GARDEN PRODUCTS OF ARVIS	HERAKLION
ORGANIZATION OF OLIVE OIL PRODUCERS "PASIPHAE"	HERAKLION
HERAKLION BEEKEEPING COOPERATIVE	HERAKLION
MELISSANTHI WOMEN'S COOPERATIVE	HERAKLION
PEZA UNION MUSEUM OF CRETE	HERAKLION
MUSEUM OF TRADITIONAL LIFE OF CRETE "LYCHNOSTATIS"	HERAKLION
ZAROS WATER	HERAKLION
PSILORITIS UNESCO GLOBAL GEOPARK	HERAKLION
AGRON AE	HERAKLION
UNION OF AGRICULTURAL COOPERATIVES OF SITIAS	LASITHI
UNIION OF AGRICULTURAL ASSOCIATION OF IERAPETRA	LASITHI
AGRICULTURAL UNION OF SITIAS	LASITHI
AGRICULTURAL UNION OF COOPERATIVES OF MERAMVELOU	LASITHI
AGRICULTURAL ASSOCIATION OF IERAPETRA	LASITHI
AGRICULTURAL COOPERATIVE OF KRITSAS	LASITHI
AGRICULTURAL OLIVE OIL COOPERATIVE OF PAPAGIANNADON	LASITHI
AGRICULTURAL OLIVE OIL COOPERATIVE OF STAVROMENOU	LASITHI
AGRICULTURAL OLIVE OIL COOPERATIVE OF ZIROU	LASITHI
LASSITHI BEEKEEPING ASSOCIATION	LASITHI
KRITSA WOMEN'S COOPERATIVE	LASITHI
TOPLOU WINERY	LASITHI
ZEUS CRETA	LASITHI
SITIA GEOPARK	LASITHI
WINES OF CRETE	CRETE

UNION OF CHEESE MAKERS OF CRETE	CRETE
EXPORTERS ASSOCIATION OF CRETE	CRETE
ASSOCIATION OF CRETAN OLIVE OIL STANDARDISATION INDUSTRIES	CRETE
BEEKEEPING COOPERATION OF CRETE	CRETE
CRETAN GASTRONOMY NETWORK	CRETE
CRETAN GASTRONOMY CENTER	CRETE
CRETAN RUSK GROUP	CRETE
CHEF'S CLUB OF CRETE	CRETE
CHALKIADAKIS SUPERMARKETS	CRETE
SYNKA SUPERMARKETS	CRETE
NATIONAL UNION OF AGRICULTURAL COOPERATIVES	GREECE
MUSEUM	NOT DECLARED
AGRICULTURAL COMPANY	NOT DECLARED