

Cyprus Destination Partnership

‘Cyprus Breakfast for Cypriot Hotels’



Final Submission

January 2014

Acknowledgments

We would like to thank the Cyprus Destination Partnership for trusting and supporting us in preparing this important research work for improving the authenticity of the tourism experience in Cyprus. We strongly believe that the concept of a Cyprus Breakfast and the framework associated with it, as suggested herein, could create a new unique selling point for the hotel industry and become the flagship of the Cyprus Food Tourism product.

We would also like to express our gratitude for the excellent co-operation in this project, to Suzannah Newham and Julie Middleton of the Travel Foundation, Monika Liatiri and Lygia Dermatis of the Cyprus Tourism Organisation, Philippos Droushiotis and Irene Yiasemi of the Cyprus Sustainable Tourism Initiative.

The research work for the concept of the 'Cyprus Breakfast' has taken place from September to December 2013 in the regions of Pafos and Polis. The Project Team has been co-ordinated by Savvas Maliotis and supported actively by Nasos Hadjigeorgiou, Nikolas Tsifoutis, Agni Photiou, Florentia Kythreotou and George Kassianos. The team covers the full spectrum of expertise in tourism and hotel management, agrofood and gastronomy and possess a wealth of knowledge on Cyprus' gastronomic heritage.

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4th January 2014

This report has been prepared by the partnership of A.M. Filagrotiki Consultancy Ltd and the Pafos Regional Board of Tourism Ltd.

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Executive Summary

The objective for creating value added to the Cypriot hotel industry stems from the need to find ways of escaping from the channel of continuous price competition, in which substantial part of the industry has been trapped. Furthermore, strategic planning demands that value creation must follow the emerging consumer trends of the international travel industry. There is ample evidence to suggest that consumers are looking more for authentic experiences rather than 'artificial' or 'globally identical' travel destinations. Consumers, especially of an upper market status, are also becoming more sensitive on ethical issues, expecting from hotels responsible behaviors in protecting the environment, caring for the local communities and supporting the socially and economically deprived people.

Among the emerging consumer trends, food tourism ranks high, especially among travelers with better educational and economic status. Although Cyprus does not fall among the established brands for gastronomy tourism, it possesses a substantial gastronomic tradition, closely linked to its history and culture. Being situated on the crossroads of civilisations with deep rooted history and existence, Cyprus' food treasures have been influenced by the cultures of different invaders, rulers and shaped into what one may term as an authentic experience. In this context, the concept of a Cyprus Breakfast can support a new branding proposition for the hotel industry based on the authentic and traditional character of the local cuisine and act as an umbrella promotion tool for supporting the Cyprus Tourism Industry.

This research work concludes that there is a common ground for both the hotel industry and their customers to adopt a new concept, in an organised manner which would promote not only the authentic products but the culture and other intangible values behind them. Although hotels are striving to create traditional corners, gaps are noted in their efforts and there seems to be an inconsistency in the presentation and innovative usage of these products in their breakfast buffets. In the region of Pafos, in which much of the research took place (the balance of work carried out in Polis), hoteliers seem to have been offering a breakfast selection that fits the needs of the British consumer, the dominant tourism nationality in the region. Yet, one cannot ignore the different preference options and the greater authenticity demanded by other nationalities. Furthermore, no one can ignore the need to differentiate and prepare for a value chain that will meet emerging consumer trends, irrespective of their nationality.

In trying to establish a framework for the Cyprus Breakfast, the study has focused predominantly on the authentic Cypriot gastronomy as a communication tool for promoting products and services that make up the 'Cyprus Food Tourism' product. The proposed framework has opted not to impose limitations and constraints on the origin of products and the supplier base, deliberately not wishing to upset current procurement practises. Therefore the proposed criteria do not focus on achieving direct support to the local micro-producer, yet support to the local community is an issue considered in an innovative way and indirectly incorporated into the criteria.

Taking into account the views and perceptions from hoteliers, consumers and the stakeholders, this research study has come up with a set of twelve criteria that make up the core framework in which the Cyprus Breakfast could evolve. Some of these criteria are novel in nature and aim to combine authentic tastes with educational experiences for a genuine appreciation of Cyprus' traditional gastronomy. Furthermore, this framework sets the ground for a win-win approach, through which the hotel industry would support local communities and micro-producers, acting as a communication channel for their Food Tourism products and services.

Finally, the study proposes an organisational structure that will coordinate and manage the implementation of Phase II – the pilot implementation in the Pafos & Polis regions for testing the proposed framework.

1. Need Identification & Project Objectives

1.1 The Sun & Sea concept Vs the emerging consumer trends

Tourism in Cyprus has for decades focused on the concept of the 'sun & sea', a major competitive advantage that has shaped the tourism industry in the past and is most likely going to remain so in the years to come. This statement is strongly supported by the results of a recent research study¹ in which tourist visitors in Cyprus claimed by the overwhelming 95.6% that the sun-sea combination is the most important reason for visiting the island. However, the sun & sea concept has its drawbacks, in the sense that it sustains the seasonality problem creating an uneven spread of the tourism inflow around the year and depletes resources in the seaside regions where the tourism industry is concentrated.

Furthermore, the sun & sea concept is an advantage on which other destinations are already capitalising on and certainly one that is not unique to Cyprus. Looking for ways that can further support the sun & sea concept with authentic experiences and sustainable practises can provide product differentiation and would fit closely with emerging consumer trends that are described in the following two quotes:

«In the medium term, the experts believe that important changes in travel demand and supply will emerge. One trend will be that consumers will seek new and more authentic experiences, they predicted. More people would turn their backs on artificial 'travel worlds' and instead seek authentic holiday destinations and experiences with more interaction with local communities.....»²

«Today's consumers expect travel companies to build sustainability into their product offer. A majority (70%) believe companies should be committed to preserving the natural environment and 55% want fair working conditions, while three quarters want a more responsible holiday and 66% would like to be able to easily identify a greener holiday»³

Times are therefore changing and travellers demand the authenticity of the experience whilst their sensitivity on ethical issues, green practises and sustainable resource management is evident from the fact that international Tour Operators are striving to achieve greener destinations by imposing rules and drafting appropriate guidelines for the travel industry. Business scholars from around the world claim that businesses with short sighted behaviours are most likely to lose out in the future if they do not realise and adjust early to these emerging consumer needs.

In this context, there could be a need for the Cypriot tourism industry to infuse in its tourism product and across its tourism industry, authentic hotspots, in an organised manner so as to create a new unique selling point for the island and a key branding characteristic. The authenticity of food and its close relationship to the cultural heritage which in turn creates a food experience for the traveller is a product on which the Cyprus Tourism Organisation is trying to capitalise on and the Cyprus Breakfast falls within this strategic objective⁴.

¹ Research for the competitiveness and prospects of the Cyprus Tourism Industry, prepared by PWC and the University of Nicosia, July 2013

² ITB WORLD TRAVEL TRENDS REPORT 2012/2013, prepared by IPK International on behalf of ITB Berlin, p18

³ The Travel Foundation 2012: Sustainable Tourism means business, p5

⁴ Cyprus Tourism Organisation: Strategy on Tourism 2011-15, p39

1.2 Cost cutting impairs travellers' food experience and undermines sustainable practises

During the past decade, the surge for tourism development that is based on the sun & sea concept has also been associated with intensive cost cutting exercises, especially by the hotel industry. The past decade has seen an intensified price competition in the travel market, especially by destinations offering - similar tourist products. At the same time, the rising energy and labour costs, and the high interest rates in a highly loan leveraged hotel industry, have squeezed profit margins. In turn, this has led to significant cost cutting decisions which have on occasions undermined the authenticity and uniqueness of the travel experience. The intensification of these competitive forces and the profit constraints has guided entrepreneurial behaviour to focus on short term financial viability rather than work with medium to long term objectives.

In the academic literature, it is frequently argued that a focus on short term financial goals, whilst ignoring longer term influences and trends in the marketplace could be detrimental to the future of the business. Extrapolating this to a tourism industry at the level of destination could result to Michael Porter's⁵ value chain gap, implying a value creation that would not fit to emerging consumer needs. It is certainly not the purpose of this study to evaluate the extent to which medium term consumer trends are considered vis-a-vis short term financial objectives by the Cypriot hoteliers, but it comes by default that offering a 'Cyprus Breakfast' which would be guided by authenticity and sustainability issues is a move in the right direction.

1.3 A Cyprus Breakfast for enhancing the tourist product

Cyprus has certainly a wealth of traditional and authentic products, offering the visitor a multitude of flavours, tied closely to the widely accredited Mediterranean diet. In 2010 the Mediterranean diet was included on the UNESCO World Heritage List, a major testament to the importance of food to culture in countries across the Mediterranean basin. Although in terms of international branding activities, the Cypriot cuisine has been much less tied to the Mediterranean diet than other regions eg Greece, Italy, yet Cyprus' position in the Mediterranean basin can be utilised to capitalise on this widely accredited heritage. One form of enhancing the tourist product and increasing the quality of the tourist experience is the notion of a 'Cyprus Breakfast' to be offered by Cypriot hotels. From the outset we note that this notion has a threefold effect on the tourist product which needs to be studied and treated separately, considering however the spill over effects between them:

- (a) **The cultural impact:** The enrichment of the tourist product with the authentic tastes of the local food and the cultural aspects associated with this.
- (b) **The social/ ethical impact:** The extent to which it may support the local agro-food businesses and benefit the local community in the broader sense
- (c) **The sustainability impact:** The imposition of procurement rules and criteria that link to sustainability issues, leading to the protection of the environment through the reduction of CO2 emissions and greener production practises.

These impacts are very closely linked to the emerging consumer trends that were described earlier in this chapter, confirming that choosing to offer a 'Cyprus Breakfast' at the hotel industry level is a product differentiation approach that is in line with global consumer trends and their emerging expectations from a tourism experience. These impacts are also highlighted across much of the available literature on food tourism, an example of which is cited here as it explains in a sound manner their link to food tourism,

⁵ Porter M. and Kramer M., 2011. Creating Shared Value. Harvard Business Review, Jan 2011

«.... Any creation of value proposition made to strengthen travel motivations centred on gastronomy should be underpinned by sustainability principles and practices and organized around an effective system of public-private cooperation. Both approaches are inseparable and can provide benefits not only to direct providers, such as restaurants and food industries, but also other sectors indirectly related but linked to tourism, creating conditions for improving local employment and the promotion of new activities in zones of influence»⁶

1.4 The Project's objectives

The project's primary objective is to evaluate the potential for the development of a concept named as 'Cyprus Breakfast on offer by Cypriot Hotels'. In its terms of reference and for achieving this primary objective, the project has concentrated in the following specific (or secondary) objectives:

1. Define the meaning of Cyprus Breakfast, the content and characteristics as understood by the hotel industry professionals, the stakeholders and the tourists
2. Create a literature review on traditional products by providing a mapping of the traditional products that can be included in the 'Cyprus Breakfast'.
3. Evaluate the level of the traditional character in the Cyprus breakfast offered currently by hoteliers
4. Evaluate both, the authentic/ cultural impact and the sustainability/ social impact of the Cyprus Breakfast on offer. This objective further demands the evaluation of current practises and the constraints, limitations and other considerations pertaining the decision to offer an authentic experience in the breakfast menu
5. Provide a suggested framework or guidelines for the development of a common concept that could be branded as the Cyprus breakfast as an effort to differentiate and add value to the hotel product
6. Suggest an action plan for the implementation of the concept of a pilot scale at the Pafos and Polis regions.

At this first stage of the Project, work has geographically focused in the district of Pafos, including also the Polis region. Yet, the work's relevance should be seen as applicable to the whole island and its future implementation should be planned as an island-wide rather than a regionalised concept.

Based on the need identification and the impacts approach discussed above, by the end of this study three crucial questions are answered, and these have in fact been used to make up the Executive Summary of this report.:

1. Can the concept of the Cyprus Breakfast support a new branding proposition for the hotel industry based on the authentic and traditional character of the local cuisine?
2. What is the role of the Cyprus Breakfast in the strategy for developing food tourism and the local gastronomy?
3. Can the Cyprus Breakfast provide the means by which the hotel industry will guide sustainability in the agrofood industry and establish a support channel with the local communities?

⁶ Herrera C., Heranz J., Arilla J.; Gastronomy's importance in the development of tourism destinations in the world, in UNWTO report of Food Tourism 2012



2. Background Information

2.1 Defining Food Tourism

Food has always been central to every traveller's experience, offering both interesting and new flavours but also linked to the customs and traditions of a place. However, over the last decade a growing number of research studies have focused on the link between food and tourism in order to understand and explain the new wave of food travellers, or travellers looking for the alternative experience in the globalised travel market. Terms like culinary, gastronomy and food have been used as adjectives in order to describe a specific type of tourism which according to the World Food Travel Association (WFTA) may be defined simply as '*the pursuit and enjoyment of unique and memorable food and drink experiences, both far and near*'⁷. To further explain the phrase 'far and near' the WFTA clarifies that people are food travellers both when travelling abroad as well as when travelling within their region of residence. The WFTA has selected the term **«food tourism»** as the most appealing of all terms used to describe the experience defined above and this conclusion is further confirmed by the titles of recent research studies.

Another highly appealing definition has been proposed by Hall and Sharples⁸ according to which *«food tourism is an experiential trip to a gastronomic region, for recreational or entertainment purposes, which includes visits to primary and secondary producers of food, gastronomic festivals, food fairs, events, farmers' markets, cooking shows and demonstrations, tastings of quality food products or any tourism activity related to food»*. Taking into account this definition and in order to summarise the concept of food tourism, a schematic approach has been developed (Appendix 1), which presents the various food tourism activities in the form of subsets which are in turn dependent on the different needs of the traveller. In this schematic approach, concepts such as wine routes, gourmet restaurants, food festivals and alike, are recorded as subsets of 'Food Tourism' and they are directly linked to the different needs of the food traveller.

At the outset, it is suggested that the general concept of a 'Cyprus Breakfast', as investigated in this report, is another subset of Food Tourism. This is a sensible approach to take since breakfast that is linked to authentic flavours and locally procured ingredients meet the broad requirements of food tourism. However, an important finding of this research work is related to the position of the Cyprus breakfast in the big picture of Food Tourism, as depicted in the diagram of Appendix 1. This finding is central to the proposed concept for the Cyprus breakfast and is discussed in the last chapter of the report.

⁷ www.worldfoodtravel.org

⁸ Hall, C. M., & Sharples, L. (2003). The consumption of experiences or the experiences of consumption? An introduction to the tourism of taste. In C. M. Hall, E. Sharples, R. Mitchell, N. Macdonis & B. Cambourne (Eds.), *Food Tourism Around the World: development, management and markets* (pp. 1-24). Oxford: Butterworth-Heinemann

2.2 Food Tourism, an emerging trend for the world travel industry

*'In recent years, Food Tourism has grown considerably and has become one of the most dynamic and creative segments of tourism. Both destinations and tourism companies are aware of the importance of gastronomy in order to diversify tourism and stimulate local, regional and national economic development. Furthermore, Food Tourism includes in its discourse ethical and sustainable values based on the territory, the landscape, the sea, local culture, local products, authenticity, which is something it has in common with current trends of cultural consumption.'*⁹

The above quote is the introductory paragraph to the most recent report of the WTO on Food Tourism and confirms both the trend and the impacts associated with this, namely sustainability, local economic support and authentic experience. Reading through the lines of key recent reports on food tourism, it is confirmed that food tourism is a phenomenon of a global nature that is in a clear growth phase. Food tourism is no longer linked to sophisticated lifestyles; neither does it mean gourmet food or a wine lover's traveller experience. These are no more than just subsets of Food Tourism, as indicated already in the diagram of Appendix 1.

Capitalising on the cultural value of the authentic gastronomy is an issue that has been taken seriously by many organisations around the world. Key examples of organised food tourism initiatives identified in literature are,

- Tasting Spain, an initiative run by the Spanish Association of Destinations for the Development of Culinary Tourism
- Taste of Portugal launched in 2010 by the Portuguese Tourist Board
- The Hansik (Korean cuisine) Globalisation Project launched in 2009 by a cooperation of various Ministries of the Korean Government

Many more case studies are cited in two extensive reports published recently by the OECD¹⁰ and Go:tteborg & Co¹¹, thereby confirming that food tourism is a global issue and an emerging trend for the coming years. In the extensive research undertaken for Go:tteborg&C, it is proven that 'foodies' – food lovers – are a growing segment of the European travellers' market, characterised by better education and higher incomes than the norm. These people are willing to travel to destinations where they can eat good and authentic food, visit traditional food makers and enjoy a day out in a food festival.

Furthermore, food tourism has a positive impact on the economy, employment and local heritage, as tourists seek to get to know not only the local food but also its origin and production processes, making it an expression of cultural tourism; it has great potential for expansion as a main motivation for tourism trips in the countryside. Although in its sophisticated way, it is practised by a minority of oeno-gastronomy elite category of tourists, evidence suggests that it is becoming more of a mainstream tourism experience and one that contributes towards improving the general perception of the destination. Destinations that cannot claim for being established brands for gastronomy tourism for the sophisticated food & wine traveller may still opt for a gastronomy product that offers an authentic experience to the mainstream traveller, thereby avoiding a direct competition with the leaders of this tourism activity.

⁹ UN World Tourism Organisation, 2012; Global Report on Food Tourism, p5

¹⁰ OECD Studies on Tourism (2012): Food and the Tourism Experience, The OECD-Korea Workshop

¹¹ Go:tteborg & Co, (2013): Food Tourists: Who are they, what do they want, how do you package offers, and reach them

2.3 Current experiences on the concept of breakfast with regional or country character

In the recent literature on Food Tourism, the concept of a local breakfast does not appear in the list of branded gastronomy products and most case studies on food tourism do not refer to this concept as a distinct differentiation approach on a regional or countrywide basis. One recent effort that has tried extensively to create the concept of an authentic breakfast is the 'Greek breakfast'¹² led by the Hellenic Chamber of Hotels. The Greek breakfast is very closely related to the proposed Cyprus Breakfast and hence the research team has carried out an extensive deskwork review of their approach. It needs to be stressed that the Greek Breakfast which was established in 2010, is regarded by many as having a successful start with a bright future. In its three years of operation it has 206 members and in a recent study by the University of Patra it is estimated that *'the net benefit to the economy from the implementation of the Greek breakfast during the year 2012 is around €368million, resulting from the increased usage of local products'*¹³.

The Greek Breakfast as defined in the Manual for Hoteliers¹⁴, aims to form part of the Greek gastronomic diplomacy by which the hotels gain value added for their services. At the same time, customers should have the experience to see, taste and be educated about the local cuisine of each destination (referring to the different authentic recipes of the various regions and islands across the country). The Greek Breakfast also aims to bring hotels closer to the local supplier and the local community. Its framework is based on the following broad considerations, as these are specified in the Manual for Hoteliers:

- At least 50% of the suppliers are Greek
- Greek products are organised in a specific area or otherwise labelled accordingly
- All Greek products and recipes are labelled with the logo of the Greek Breakfast
- The logo should appear also on the menu list
- Hoteliers sign a declaration of quality commitment
- Hotels entering the scheme are promoted via the website
- Customers are urged to post comments on the website
- Hotels are urged to engage themselves in other gastronomic activities eg cooking lessons, gastronomy lectures etc.

Although the term local is not specified in the Manual, the Greek breakfast capitalises heavily on the very large number of PDO/ PGI¹⁵ products which provide a guarantee about the authentic character that is linked to the locality. Support to the local producer is meant to be safeguarded through the implementation of the first requirement on the list above, but it is our opinion that this does not ensure the origin of the produce or the traditional aspect, issues discussed extensively in Chapter 5.

2.4 The concept of traditional food

The meaning of traditional foods has been investigated deeply under the Research project TRUEFOOD (Traditional United Europe Food – Contract no. 016264-2), funded under the EC Sixth Framework Programme. In a study carried out within this project¹⁶, *'European consumers seemed to define traditional foods as "well-known" foods, that one "can eat often" and that were eaten already by "our grand-parents". Conversely, traditional foods were less strongly associated with being "natural and low-processed"*. Based

¹² www.greekbreakfast.gr

¹³ Trofima & Pota, Weekly bulletin Issue 43, 28/12/2013

¹⁴ Greek Breakfast, Manual for Hoteliers, available at www.greekbreakfast.gr

¹⁵ See <http://ec.europa.eu/agriculture/quality/schemes/> for a list of Greek PDO/PGI

¹⁶ Vanhonacker F., Lengard V., Guerrero L., Scalvedi L., Raude J., Hersleth M., Verbeke W.; Europeans and Traditional Foods: Definition and Image from the Consumers' Perspective

on extensive research in six European countries which clearly differ in terms of cultural background, namely Belgium, France, Italy, Norway, Poland and Spain, the concluding remarks¹⁷ on the key criteria that determine what traditional food products are, is summarised as follows:

- *The product is regularly consumed or associated to specific celebrations and/or seasons*
- *Time factor: usually 50 years – commercial availability in stores and restaurants*
- *Specific way of production – according to the gastronomic heritage – authenticity (recipe, origin of raw material, production process)*
- *Associated to a certain area (local, regional, country)*
- *Distinguished and known because of its sensory properties*
- *Gastronomic heritage: has a story, which can be written down*

We regard this definition of traditional food and the criteria selected too broad for the purpose of this work. Instead, we have distinguished products into four categories and the terms used to describe their link to the concept of Cyprus Breakfast are defined below:

- **Traditional:** Products made in Cyprus for at least 50 years using local recipes and local ingredients, irrespective of whether similar products can be found elsewhere. These products are also closely related to the eating habits of local people either across the island or in specific regions eg rose pedals spoon sweet
- **Authentic:** These are traditional products with characteristics and production methods exclusively produced in Cyprus with no similarities known elsewhere eg haloumi cheese
- **Locally produced:** Food produced and/ or processed in Cyprus, whose production region can be clearly specified or the region has gained fame for this product, but may not be termed as authentic or traditional eg Red Soil potatoes from Kokkinochoria
- **Mediterranean type:** These are products that are produced locally or all over Cyprus and are closely linked to the Mediterranean diet eg olives, olive oil.

It is obvious that some products may fall to more than one category but for reasons of analysis and product portfolio management this categorisation is a useful one. In fact, the proposed list of products associated with the Cyprus Breakfast in Appendix 4 makes also reference to this categorisation. In the text of this study the above words may be used interchangeably and with a vague meaning but when product categorisation takes place and for reasons of building educational material, these definitions need be considered and used appropriately.

2.5 Support to the local community

An important issue associated with the ethical impact of food tourism, including the concept of the Cyprus Breakfast, is related to the locality of the products procured from (food and other goods) and the support it gives to the local community. Cyprus is a small place and by definition the locality would apply to the whole island. Indeed, the fact that the project focuses on the Cyprus and not the Pafos Breakfast, is a decisive factor in the definition of what is local – a term which in turn affects how one defines a local supplier. Yet, it is the belief of the Project Team, reaching also a consensus at the Focus Group discussions that there are deeper issues associated with the notion of support to the local community and the regional economy. These are directly related with efforts of ‘pushing’ the tourist out of the hotels, suggesting reasons for travelling inland thereby visiting the rural parts of Cyprus and providing economic support for these deprived regions.

¹⁷ True Food 2006, Final Paper

In this context, we may define the need to support the local community from two perspectives:

- (a) Procuring products from, thereby offering support to, small SMEs that work close to the hotel industry and are mostly using local raw materials and labour eg a local cheese maker who is based in a small village close to Pafos and uses local milk supplies and hires labour from the community,
- (b) Use the breakfast as a communication tool to prompt tourists to visit the rural regions, the local actors and hence indirectly support the local community

Ideally, the Cyprus breakfast should achieve to support the local communities from both perspectives an issue that is examined in the field work carried out for the purpose of developing the framework of operation.

2.6 Sustainable issues into the food selection process

Issues of sustainability could be seen as more complicated when incorporated into the food supply chain, demanding from suppliers to prove their dedication to greener production practises. Sustainability principles are high on the demand list of major tour operators, even with the food selection at the hotels, an effort that aims to meet the growing concerns of customers on environmental issues. When sustainability is high on the priority list of a hotel, criteria are imposed in the food procurement processes which could be related to,

- a high proportion of organically produced foods
- calculated CO2 emissions, based on a predefined formula (eg the B.E.S.T. pilot project for aiming to reduce CO2 impacts on meals developed in 2007 by the Ecole Hoteliere de Lausanne) or by deliberating deciding to procure carbon neutral labelled products
- Procuring from suppliers who have acquired an accredited environmental certification, eg ISO14001 or EMAS (European Ecosystem Audit scheme).

Based on literature reviews and on current experiences, an investigation with regard to the above targets has also been carried out, in an effort to specifically define if it can be possible to establish sustainability criteria when deciding about the Cyprus Breakfast concept.

3. Description of tools and methodology

The methodology of work has focused both on field research and desk work associated with literature reviews on (a) food tourism internationally practised and (b) the mapping of the Cyprus traditional products. The methodology is described schematically in Appendix 3 and in the table below. An analytical description of the tools used in the relevant field works is provided in their respective chapters. It needs to be pointed out that this research work has been based on the assumption that the concept of the Cyprus Breakfast is studied across all hotel types, irrespective of their star rating. Hence any legislative framework governing the different hotel types is not taken into account and does not affect the proposed framework which should be seen as relevant to the hotel industry as a whole.

Overview of Activities	Outputs
Investigation into what a 'Cyprus Breakfast' could include	
A mapping of Cyprus products based on the categorisation defined in section 2.4 has given 19 categories of products and 9 of these are further analysed in the products that have been selected in each category. This mapping is certainly non-exhaustive but it covers much of the island's gastronomy treasures. The work is based on extensive research undertaken in the past in two projects related to the Cyprus traditional food products in which the team of experts have carried extensive research, namely, www.cyprusfoodndrinks.com (S. Maliotis, coordinator and food researcher) and http://foodmuseum.cs.ucy.ac.cy (F. Kythreotou, food research). Both projects have been funded by the Research Promotion Foundation and more in depth analysis is available through these websites. Additionally, the work has added input from interviews with relevant stakeholders including the Ministry Of Agriculture, Professional Associations of agro food producers and the Cyprus Chamber of Commerce	A set of data sheets for 9 product categories in Appendix 3 and a list of products for 19 categories in Appendix 4
Literature Review on Food Tourism and the international experience	
Desk work on literature review on reports focusing on, <ul style="list-style-type: none"> • Food Tourism • The Cyprus Tourism Industry • Authentic or traditional foods 	The work is presented in Chapter 2
Identification and analysis of the current breakfast 'offer' within hotels to assess the extent to which locally-produced, traditional, Cypriot breakfast products are currently included	

Semi-structured interviews with hotel industry professionals to identify the current breakfast situation. Also, an assessment of the extent to which hotel practices would need to be adapted to deliver the 'Cyprus breakfast' i.e. will they need to source different products or change suppliers or is it mostly a case of re-branding the current 'offer'?	Presented extensively with quantitative and qualitative results as Chapter 4 and relevant Appendices 5 and 6
Identification of the potential demand for a 'Cyprus breakfast' among UK and other source market tourists	
Surveys (n=122) with tourists to identify their thoughts about the current breakfast offering at their hotel, what they understand to be Cypriot, whether they would be interested in a Cyprus Breakfast offer, what they would like/expect to see included, etc	Presented as Chapter 5 and the relevant Appendix 7
Focus Groups for discussion among (1) stakeholders directly related to the industry, (2) university students and academics in related subjects	
2 focus groups have been organised with invited persons (a) that come from the academic and journalist profession, including students aiming to get fresh ideas, (b) stakeholders who officially represented interested organisations and associations.	Notes on the comments, observations and suggestions are presented in Chapter 6, and incorporated in the proposals

4. Hotel industry behavior - *perceptions & practices for preparing the breakfast menu*

4.1 The research tools used

The research work with the hotel industry was based on interviews using a semi structured questionnaire (Appendix 6) that was carried out in a randomly selected sample of hotels in the Pafos and Polis regions. The hotels were placed in the database according to their star rating and then, from the list, every third hotel was selected to make up the sample of hotels as indicated on the table of Appendix 5. If more than 2 hotels were selected from the same hotel chain company, the random selection process was repeated. Hence, despite the fact that our work has covered 23 hotels (28%) in the Pafos-Polis region, the interviews with key personnel at hotel chains HQ raises the overall coverage to 31 hotels (39%). Interviews were carried out with at least one managerial staff from each hotel and depending on the organisational structure and the availability of other responsible persons to meet the Project team, a supplementary questionnaire was completed.

Interview coverage	
Period of interviews execution	October – November 2013
Number of hotels selected and % to total in the regions	23 (28%)
Total number of rooms in the selected sample and % to total in region	3766 (31%)
Number of professionals interviewed	34
Numbers of hotel chain management interviewed	3

The semi structure type of interviews has given an adequate freedom to the research team to obtain an in depth understanding of hoteliers' emotions, concerns and expectations which are described analytically in this chapter. Where possible, questionnaire responses have been quantified in tables that are presented in the following sections, whilst the findings and conclusions have also taken into account the observations of the qualitative work – i.e. resulting from the discussions with hoteliers. The findings are organised in 5 sections and their respective objectives are summarised in the table below. The observations noted in this chapter have subsequently been used along with the rest of the information derived from other activities of the Project to arrive at the conclusions noted in Chapters 7 and 8.

Section	Objective
4.2 Procedures for selecting the breakfast menu and the room decoration	Draw conclusions on the decision making process and the factors affecting the choice of selecting the breakfast menu
4.3 Understanding consumer perceptions	Record the professionals' understanding of consumer needs and the procedures in place for measuring customer satisfaction
4.4 Defining and supporting the authentic, traditional character	Evaluate the (current) role of the authentic, traditional character in the breakfast – the cultural impact
4.5 Supporting the local supplier and introducing sustainability issues in their breakfast selection	Evaluate the (current) support provided to the local community and the promotion of local products (including the notion of being made with sustainable practises) – the sustainability impact
4.6 Willingness to support the concept of 'the Cyprus Breakfast'	Record the level of readiness or willingness to support the concept of 'the Cyprus Breakfast'

4.2 The decision making process for selecting and presenting the breakfast menu

(Questions D1 – D5)

Selections procedures: There is no common procedure for selecting products, dishes and deciding on the

D1: Breakfast menu composition decision maker	
1: Chef	9.5%
2: F&B Manager	0.0%
3: F&B Manager-Chef	33.3%
4: General Manager	14.3%
5: Gen. Manager-Chef	42.9%
6: Owner	0.0%

breakfast menu as this depends on the internal organisation, the business culture, the level of attention paid to food quality and the extent of centralised decision making. The general consensus suggests that the selection process is a team work which involves both the executive chef (and chef team) and the hotel management team. A key observation focuses on the different approaches, constraints and limitations between individual hotels and hotel chains. In hotel chain organisations, decision making is part of the internal business structure and falls within the responsibilities of the operations management team

while in individual hotels, procedures are less formal and decided by the F&B manager and the owner/manager. The frequency of changes in the breakfast menu is predominantly seasonal, as indicated in the table D2, with the exception of hotel chains in which the decision making, the planning and the selection of suppliers takes place usually on an annual basis (by mid-spring) with minor adjustments possible during the season ahead. Table D2 values are slightly misleading since the hotel sample has included less than 2 hotels from chain companies. Bearing in mind that 25 out of the 80 tourist accommodations businesses belong to chains, (accounting for around 45% of the total room capacity in the region), it implies that the actual proportion of hotel chain decision making is much higher and hence the decision making based on option 2 (once a year) would be much higher.

D2: Frequency of changes in BR composition	
1: Seasonally	47.6%
2: Once a year	28.6%
3: Almost Never	9.5%
4: Never	9.5%
N/A	4.8%

The early organisation of the breakfast menu, the products and the supplier base is a critical process as it affects the cost planning of the hotel and the annual planning of the F&B procurement department.

D3: Criteria for changes in BR composition (Ranking from 1-6 – only top 3 ratings shown)						
Rating	Feedback	Seasonality	Availability	Cost	Usability	Other
1 st	23.8%	4.8%	0.0%	52.4%	0.0%	19.0%
2 nd	38.1%	38.1%	4.8%	19.0%	0.0%	0.0%
3 rd	19.0%	19.0%	38.1%	9.5%	14.3%	0.0%

However chefs are given the chance to work innovatively with the products available and occasionally come up with new recipes. The cost factor is important in the selection of the ingredients, although this becomes a secondary factor in the 4/5 star hotels. The overall selection process is

significantly based on the customer feedback and the experiences gained from the previous years on the needs and expectations of prospective customers, which are in turn closely related to the factor of nationality. Among hoteliers there is a widespread view that customer requirements are continuously evaluated and accounted for in formulating the breakfast menu, yet there is no clear indication as to the methods used to carry out this ongoing evaluation.

The difference between hotel chains and individual hotels is also noted in the qualitative discussions of question 4a (non-tabulated) - *factors determining the choice of materials or quality elements of the breakfast*. The critical difference between hotel chain organisations and individual hotels lies in the greater importance given by the former group on (a) the volumes demanded and (b) the selection of suppliers that can meet the volumes at competitive prices. This factor inevitably leads to the need to look for industrially made local

and/or imported products which are available at sufficient volumes throughout the year and at acceptable prices that can fit the breakfast cost requirements. Hotel chains are much more interested in co-operating with suppliers with proven reliability in volume supplies at the requested quality and price. Furthermore, hotel chains prefer to work with fewer and bigger in size suppliers who can cover a wide variety of products and an island-wide geographic coverage since this reduces the cost of logistics and improves the efficiency of the procurement procedures (orders, deliveries and payments).

The decision making process was also evaluated with regard to the requirements demanded by Tour Operators. The effect of tour operator co-operations (question D4b) is mixed in terms of replies, but the point to note is that positive replies are linked to the cost factor (push by tour operators to reduce prices) which deters hoteliers from offering a good authentic breakfast. The cost component enforced by the Tour Operators is given as a major factor that has led to the addition of inferior quality products in the breakfast, especially for the 2/3 star hotels and hotel apartments.

D4b: Co-operation with tour operators affecting the decision to select breakfast menu	
1: Major Selling Point	9.5%
2: Affected in great extend	33.3%
3: Not really affected	4.8%
4: Not affected at all	33.3%
5: N/A	19.0%

4.3 Understanding consumer perceptions

(Questions E3b, E4)

The research team has evaluated hoteliers' perceptions on their consumer needs both using qualitative and quantitative questions. In quantifying the responses, the table for question E4 suggests that 33.3% of

E4: Do customers demand more from the breakfast on offer?	
1: YES	33.3%
3: YES, but to a limited extent	4.8%
4: NO, prefer familiar flavours	38.1%
0: NO	9.5%
2: N/A	14.3%

the respondents believe that customers demand more from what is currently on offer (in terms of the authenticity of the breakfast menu), while another 38.1% hold the view that customers would rather stick to familiar flavours. Qualitative work suggests that this view is directly related to the nationality of the customers staying at the hotel or the type of the potential customer preferred by the hotelier. In the former case (1: YES), hoteliers' replies refer to Russian or Central European customers for whom they believe (quoting from hoteliers replies):

- *They (Russians) would eat anything served and food served as Cyprus will be appreciated along with the rest of the buffet menu (more of a passive behaviour and less linked to the use of senses)*
- *Russian and Ukrainian customers are happy to taste Cyprus authentic flavours as much as they are happy to taste any food on the buffet*
- *Scandinavians an Central Europeans are happy to have the chance to taste traditional and authentic Cyprus foods, and would like to note the difference from the international cuisine (deliberately wishing to taste and sense the food)*

In the case where the reply is option 4 (NO, prefer familiar flavours), hoteliers refer mainly to UK nationals whom they regard as a group of customers who demand the English type of breakfast and may be willing to taste traditional foods by '*probably putting it on a side of their plate*'.

The views expressed above are based on feedback they have from customers (see table E3b) but there is no clear evidence to suggest a systematic and scientific approach in customer evaluation. This is indicated by the fact that hoteliers were not in position to clearly describe the food preferences of UK

E3b: Do you evaluate customers' needs?	
1: YES, often	66.7%
2: YES, once	4.8%
3: NO, never	28.6%

repeat travellers and whether they would be happier to explore new tastes rather than first time visitors. It is also noted that UK tastes are more conservative than other nationalities but these have not been scientifically evaluated in tasting panels for new recipes.

It is also known that the cold climate of Russia has led to a tradition of a rich breakfast which could include, among others, a wide variety of smoked meats¹⁸, such as the traditional hiomeri and the Cyprus loukanika (sausages) that are smoked and matured in red wine. These flavours are rarely available on the buffet, especially due to the high cost factor and the low package deals often reached between hoteliers and tour operators. However, the need to clearly understand, using scientifically proven methods, the eating habits, needs and expectations of the different nationalities is crucial in deciding the breakfast menu as this makes up a major part of the hotel intrinsic value.

4.4 Defining and supporting the authentic, traditional character

(Questions E1a, E1d)

In an effort to understand the hoteliers' intention in giving a distinct character to their breakfast, question E1a has been put forward with the outcome indicating that the vast majority of respondents hold a positive

E1a: Current willingness to give special character in the composition/ presentation of breakfast	
YES	71.4%
NO	28.6%
If NOT, why?	
1: Already exists	33.3%
2: Low occupancy	16.7%
3: Happy with existing menu	50.0%
If YES, what character	
1: International	26.7%
2: English	0.0%
3: Cypriot	20.0%
4: English-Cypriot	33.3%
5: Mix	20.0%

view. Moreover, the percentage of negative responses (28.6%) are not due to the aversion towards the suggested concept but rather to the fact that the overall capacity of the hotels is quite low (less than 30%) and concentrated in the summer season, an issue that is regarded as a constraint in implementing a new concept with additional obligations. The conclusions drawn generally outlines an interest in enhancing the breakfast's Cypriot character, to an extent though that does not degrade the British or other international cuisine products and dishes already on offer. It is noted that 20% of respondents (in the YES response) who support a purely authentic Cypriot character operate predominantly small specialty hotels mainly in the Polis region.

Question E1d aimed to capture how hoteliers understand the meaning of the Cyprus breakfast concept and what methods they would use/ prioritize to enhance this character. The vast majority highlight the addition of Cypriot products in the composition of the

breakfast and authentic traditional elements in its presentation. However, the lack of knowledge of the cultural aspects of traditional products was strongly emphasized during the interviews. This is why the ability to give customers the necessary information appears very high on the priority list, which may be provided to the tourist through informative material and to the hotel staff through training on the cultural and nutritional value of local and traditional products. All respondents agree that this information material or training of the staff would preferably be undertaken collectively, for a more uniform and correct information aimed at educating the consumer and enhancing his appreciation for the authentic/ traditional Cyprus products

E1d: Which elements would you emphasize to impact the Cyprus character of your breakfast (top two ratings shown here)				
Rating	Authentic/ traditional features	Add certain products	Room Décor	Inform Customers
1st	23.8%	66.7%	4.8%	4.8%
2nd	28.6%	23.8%	4.8%	42.9%

¹⁸ Greek Breakfast manual for hoteliers, Hellenic Chamber of Hotels

and recipes. The addition of Cypriot traditional elements in the decoration of the room where breakfast is offered, in order to enhance the local character, is not regarded as an important issue yet many hotels of 4/5 star rating are already using decorative materials and objects that resemble a traditional Cypriot setting. The majority of respondents feel that their breakfast halls already have a certain character, such that follows the general decor of the hotel. Moreover, they believe that the adoption of heavy Cypriot décor or the imposition of specific guidelines is a costly requirement in relation to the expected outcomes and does not fit with all types of hotels.

4.5 Use of local / traditional products

This part of the work, studies the existing use of Cypriot products in the breakfast menus of the various hotels. Table F4 features the main categories of products, along with the percentage of hotels that already use them or wish to incorporate them in their breakfast. The overall conclusion is that, although many traditional products are already present in the buffet, their use is rather basic, meaning that their capacity to create authentic recipes of various dishes is not utilized. Moreover, issues involving the authenticity and quality of products, vary from hotel to hotel. The survey data of each category are further analyzed below.

Cheese & dairy Products: All hotels participating in the survey use at least one type of Cyprus cheese, either “halloumi” or “anari”, while some use both. In many cases “anari” is chosen over “halloumi” due to its lower cost. Both of these cheese products are mainly offered in raw form, while grilled “halloumi” was also located in some of the hotels. Although there are many existing traditional recipes that use either of these two products as a basic ingredient (various traditional pies), an extremely low number of hotels utilizes them in this way. No other type of traditional dairy was located, apart from the traditional “Pafos or Flaouna Cheese”, used by only one hotelier, who expressed difficulties finding it from local producers.

Due to state regulations, there are quality issues concerning the use of “halloumi”, since there are certain quality standards related to the authentic recipe, the exact proportions of milk types used, the days left in brine, the size and shape of the final product etc. Large manufacturing dairy industries bypass the quality standard and produce the so called “halloumi blocks”, specifically for the hotel and catering sectors. This type of halloumi is widely regarded as inferior in taste and quality and certainly does not conform to the typical physical and sensory characteristics of the authentic product. Apart from some hotels in the area of Polis Chysohous, which use “halloumi” made with the authentic recipe, most hoteliers in the Pafos area use ‘halloumi blocks’ and admit their ignorance to the fact that it does not conform to the legally acceptable quality standard.

F4: Which of the following products are currently in use		
	1: In use	2: Wish would be used
Cheese & Dairy products	100,0%	0,0%
Trahanas	0,0%	4,8%
Carob & products	57,1%	14,3%
Grape must Products	14,3%	23,8%
Herbs	52,4%	4,8%
Honey	90,5%	4,8%
Spoon Sweets	19,0%	0,0%
Cyprus olives & olive oil	85,7%	4,8%
Local fruit & vegetables	90,5%	0,0%
Cyprus brandies	0,0%	14,3%
Commandaria wine	0,0%	14,3%
Marmalades	100,0%	0,0%

Trahanas: Although not a conventional breakfast item, trahanas ranks as a traditional product of Cyprus that makes for tasty and delicious soups. It is not currently used by any hotel, however, its composition, made by wheat and sour milk, may constitute a nutritious and healthy morning snack. A product which

chefs have not been able to use in the breakfast menu, probably due to their limited knowledge for its composition, nutritional value and the possible ways of usage as a breakfast item.

Carob & its products: Carob is used by 57.1% of the hotels, almost exclusively in the form of carob syrup. The strong, distinctive taste of carob syrup might not be pleasant to everyone; however it has amazing nutritional characteristics which are not adequately exploited. Carob is a versatile product that can be used as an ingredient to many breakfast recipes, while its nutritional and cultural values are significant but seem to be unknown to the hoteliers and the chefs.

Grape and grape must products: Cyprus has a great history in viniculture and winemaking and there is a great variety of traditional products made from grape and grape must. However, only 14.3% uses fresh grapes or grape must products in their breakfast. Grape products could be used to promote and portray the culture of the Cyprus vine and wine making, for which archaeological evidence suggests that it possesses one of the oldest history in the world. In the framework of the Greek Breakfast, grape products such as the grape spoon sweet are used in making pastries and in this way convey the message of the Greek culture in the vine and its products.

Herbs: Although 52.4% state that they use herbs in their breakfast, most of them refer to herbal teas, while only few of them serve local and indigenous aromatic herbs. Most of the hotels use imported branded teabags or dry herbs of unknown place of origin. Cyprus aromatic herbs are barely used as garnishes in hot dishes (eg scrambled eggs with Cyprus oregano) and this can be suggested as a possible opportunity for promoting authentic herbs in the hot buffet. The difficulty with this category of products lies in the inability of knowing the place of origin of the herbs and any criteria imposed on the place of origin cannot be checked adequately.

Honey: Honey is used by 90.5% of the hotels, yet its place of origin cannot be stated or confirmed as many local processors could be using imported honey in their product blends. Some hotels use imported honey in individual packages, but only a couple of hotels have been noted to present explicitly the renowned Cyprus thyme honey with a designated place of origin. It needs to be noted that Cyprus honey is at least twice the price of the imported one, while both types are genuine honey products. The authenticity in honey lies in the dominant flower from which bees harvest pollen. The Cyprus uniqueness lies in the Cyprus thyme honey, characterised by a strong aroma, thick texture and a deep golden colour.

Spoon sweets: Spoon sweets are only used by 19% of the hotels; however, even these hotels serve it in their raw form. No case has been observed where the chef utilizes spoon sweets as ingredients in simple recipes more compatible with breakfast e.g. yogurt with pieces of walnut sweet (an authentic taste with Cypriot traditional walnut spoon sweet).

Olives/ olive oil: Olives and olive oil are used by the fairly large percentage of 85.7% of the hotels. However, the locality of these products is doubtful, since their availability is limited in Cyprus and their production is not associated with a specific region of the island. Unlike other Mediterranean countries, Cyprus has not established any regional or even island brand of a PDO (product of designated origin) which could easily differentiate Cyprus olive products from non-Cypriot.

Fruit and vegetables: Fresh fruit and vegetables are used almost by all hotels, reaching the percentage of 90.5%. The issue faced in this particular case is that the origin of the products is barely known to the hotelier; however they are most likely of Cypriot production, if not entirely local. Although Cyprus produces a wide range of products, some of which have established a brand in European markets eg red soil potatoes, these are not labelled or clearly identified in the breakfast buffet. Most hotels in the area of Polis

Chysochous get their fruit and vegetables from small-scale local producers, a proven support to the local grower that is not however communicated accordingly.

Authentic drinks: Authentic drinks of Cyprus are used by most of the hotels but not during breakfast, since they are mostly alcoholic – Cypriot Wine, Commandaria, zivania, liqueurs etc. Hoteliers admit that the lack of awareness, as well as the limited time and lack of creativity do not allow chefs to inspire new recipes using traditional products. Most hoteliers and chefs seemed to like the ideas they were presented with e.g. making bread using Commandaria or making cakes using local orange liqueur.

Marmalades: All of the hotels use marmalades in their breakfast buffets, however it is not really known if these are actually made in Cyprus. Most of the hotels use marmalades not related to the Cypriot tradition, usually bought by large distributors rather than local producers, constituting their origin questionable. However, many hotels make their own Cypriot marmalades e.g. azerole (mosfilo), quince, fig, based on the seasonality of production of the fruit used and present them proudly in the breakfast buffet, without though telling the story behind them.

Cured Meats: The use of cured meats predominantly focuses on internationally known flavours such as ham, salami and sausages. Traditional Cyprus cured meats such as Cyprus loukanika (sausages), lountza and hiomeri are less frequently used, mainly by the 5 star hotels. But even where they are used, these are supplied by the big factories that have industrialised the way of making them and in no occasion do they procure from the local traditional suppliers who are mainly based in the rural region of Pitsilia. Pafos is also a known region that traditionally produced loukanika (a relevant file for PDO has been submitted), yet no hotelier is aware of this and certainly no such product reaches the hotel buffet.

Eggs: The eggs in use are from either small, local suppliers or from suppliers with an island wide coverage. In almost all cases, the eggs used come from conventional farms. Only one hotel claimed that the eggs come from their own farm while another noted that they insist in buying free range eggs but the high cost is a limiting factor in establishing this type of eggs.

Bread & cakes: Small individual hotels put great effort in producing in-house much of their bread and cakes needed. This allows great freedom for the chef to create products with authentic characteristics. Hotel chains procure much of their products from local bakeries whilst chefs are urged to use the available ingredients and complement the range with in-house recipes, especially in cakes. Yet, the Project team has recorded great potential in promoting authentic and traditional products as ingredients in making bread and cakes eg commandaria wine, carob and local liqueurs. Such examples (bread made with commandaria, carob based biscuits) were presented at the focus groups and proposed at discussions with executive chefs who have been positive in such approaches for enhancing the Cyprus Breakfast.

4.6 Description of the supplier base

(Question C2)

Note: It needs to be stressed that the supplier base and the procurement process is not dependent on the breakfast selection alone but generally on the F&B operation within a hotel, with supplier and product selection being dependent on all the F&B requirements of a hotel. Therefore the supplier base cannot be isolated on the breakfast selection and our observations inevitably have to take into account considerations other than the breakfast menu.

Description of supplier base: The analysis of the supplier base for groups of products is summarised in the table below. It is evident from the table that a large proportion of the supplier base consists of Cypriot food processors (options 1, 2, 4). This however does not imply that the products supplied are of an

authentic or traditional character and may not even be of local origin. A great number of local producers use industrialised methods to produce food, and at times, they could be using a high proportion of imported raw material eg honey, olive oil and marmalades. Furthermore, the proportions of local versus imported final products cannot be estimated as many Cypriot processors do include in their supply list both Cyprus made and imported products eg a cheese maker would supply (Cyprus made) haloumi and (imported) Edam cheese. Based on qualitative work, it can be estimated that the overall use of Cypriot made products is in the range of 50-60% with greater imports noted on the marmalades, honey and the olive products. It is highly likely that imported products are used in greater proportions by hotels that belong to chains rather than the individual hotels, since the volumes required are much higher than what the local production can offer at a given (competitive) price.

C2: MAIN PRODUCTS SUPPLIERS							
	Dairy & Cheese	Marmalades & Honey	Processed Meat Products	Fruit & Vegetables	Bakery/ Confectionery	Olives & Olive Oil	Juices
1: Primary Producer	9.5%	0.0%	4.8%	23.8%	4.8%	4.8%	23.8%
2: Local Trader	9.5%	19.0%	14.3%	47.6%	9.5%	4.8%	0.0%
3: Importer	14.3%	23.8%	0.0%	4.8%	0.0%	42.9%	9.5%
4: Manufacturer/Processor	33.3%	14.3%	61.9%	0.0%	38.1%	14.3%	42.9%
5: Own production	4.8%	23.8%	0.0%	4.8%	23.8%	14.3%	4.8%
6: Supermarket	0.0%	0.0%	4.8%	4.8%	9.5%	0.0%	4.8%
7: Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8: Combination	19.0%	9.5%	0.0%	4.8%	4.8%	4.8%	4.8%

Traders/ distributors play also a significant role in the supplier base as they are often better positioned to offer a diverse range of products and match the volumes requested as they procure from various production sources both local and imported. Traders would most likely have an island wide coverage, well positioned therefore to serve chain companies with hotels all over Cyprus. Distributors would also supply the local and /or traditional products but they, in turn, may not systematically procure from a given source. This is especially the case with fruit and vegetables where daily supplies are based on a variety of factors and certainly the place of origin varies frequently.

Primary producers: The link of the primary sector with the hotel industry is limited to the fruit and vegetable products and to some hotels who procure fresh oranges for juice making. This is most notable in the Polis region where the distance from the main centres is a limiting factor for the big fruit and vegetable distributors, giving way to small local producers who deliver regularly from their fields to the nearby hotels. However, this close relationship is not noted or communicated in any way at the breakfast buffet.

Homemade: For cost control purposes which are also combined with the quality of a freshly homemade product, many hotels prepare in house several products, predominantly local jams and bakery items. According to the hoteliers, homemade products are greatly appreciated by customers in the sense that they are often authentic in character and flavour eg quince or orange marmalade, village type leavened bread with sesame.

Defining the local supplier: A critical issue relevant to the sustainability and ethical impacts, is related to the support given by the hotel industry to the local community by procuring from sources that are located within the region. The debate here is linked to the meaning of the term local. Referring to the table above, we would initially suggest that primary producers, food processors and local traders may all be seen as

local suppliers. However, if one has to classify in a broad sense, the Cypriot (local) food and beverage Producers/ Processors then this could lead to three categories, namely,

1. SME's with more than 50 employees, termed as the big players with an island wide distribution network, a wide product range which also includes imported products
2. SME's between 10-49 employees, termed as medium size players with a distribution network that covers most of the island, with strongholds in particular districts and occasionally with a small section of imported items
3. SME's less than 9 employees who operate normally within a district with no imported final products in their portfolios and a restricted range of products, usually of traditional character using simple traditional methods

Cyprus is too small in size and all 3 categories could fall within the term local. Yet, by the strict term of the word, a local supplier should only fall within the third category and the ethical issues associated with the need to support the local community would apply to the last type of suppliers only. In the research work, we have carried out an analysis of the suppliers (primary and secondary producers) based on the above breakdown which leads to the conclusion that the overwhelming supplier base consists of category 1&2 producers in a ratio of 80:20. This is a quite reasonable behaviour since hoteliers select well known companies in the agrofood industry with island wide coverage who can (a) meet the volume requirements, (b) offer a product range that can cover all their needs in the particular product category, (c) offer competitive prices, which result from the highly industrialised processes. The case in favour of category 1&2 suppliers is even more acute in the supplier base of hotel chains where the procurement is done centrally and the above factors are of utmost importance.

It is important to note that despite the fact that the Pafos region has a number of very small producers of cheese products (category 3), the sample investigated has identified less than 3 hotels procuring from this type of supplier. Another hotel in the Polis region produces its own traditional cheese products as part of its philosophy of producing in its own farm, most of the food used at the hotel.

Sustainability criteria in the supplier selection: It has been observed that issues of sustainability and environmental practises are not included in the supplier selection criteria. This observation is an expected one, since sustainability criteria are barely associated with buyer behaviour in the agrofood supply chain.

The supplier base as a parameter to define the Cyprus Breakfast: There exist key issues that play a negative role in linking the Cyprus Breakfast to the supplier selection and the need to support the local economy (both at district level and at country level). Small local suppliers (category 3) cannot meet the volume, variety and price requirements set by the hotels. Even if the two factors can be met theoretically by the establishment of cluster networks (a very difficult task), it remains highly unlikely that the desired price is met by this type of a supplier organisation.

4.7 Willingness to support the concept of the Cyprus Breakfast

(Questions F1, F3)

F1: Would enhancing CY/ local character of your BR help your business?	
1: YES	90.5%

The overwhelming majority of the interviewed hoteliers believe that a possible enhancement of the Cypriot character of their breakfast would benefit their business (table F1). Interestingly this belief comes from all types of hotels irrespective of rating, all inclusive etc) and even from hotels that are currently offering their customers what they regard as Cyprus breakfast. Their support stems from the belief that the creation of an umbrella brand based on the Cyprus breakfast would affect their efforts in a positive way. Significant is also the fact that for 33% of those hotels, the addition of Cypriot elements would not lead to a considerable increase in cost, mainly due to the existing Cypriot character or lower relevance of the cost component (4/5 star hotels). However, for 57.1% of the respondents, the possibility of additional cost should be seen as a major concern and constraint in any effort to establish a Cyprus breakfast concept. The results of these two questions highlight the optimism of the hoteliers towards a probable shift to more authentic and traditional breakfast but highlight that this should be done with the least possible addition in cost. A further concern stressed by the hotel chains and big hotels, is related with the risk of upsetting existing procurement patterns or the imposition of limitations and costly controls in the effort to implement the concept of a Cyprus Breakfast.

0:NO	9.5%
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Questions in Part G are intended to identify the intention of hoteliers to participate in a pilot project to enhance the Cyprus breakfast and how they perceive the form of such participation. The positive intention rises to 85.7 %, closely in line with the high degree of positive replies in question F1. The negative replies come from hotels with a low star rating whose occupancy rate is dependent on locals, predominantly in the summer months. It is

Interested in participating in CY breakfast pilot program?	
1:Probably, YES	85.7%
0:NO, not at all	14.3%
Form of participation	
1: Certification scheme /particular rules-regulations are enforced	68.4%
2: Basic set of guidelines - adapted by each individual hotelier	15.8%
3: Based on the approval of a plan/ adhering to certain guidelines to obtain a logo	15.8%

F3: Would CY / local character enhancement lead to higher cost?	
1:YES	57.1%
0:NO	33.3%
2:N/A	9.5%

interesting to comment that the majority of hoteliers holding a positive view would like to see the development of a Certification scheme where particular rules and regulations are enforced. This option has been the most preferred one as, according to respondents, it safeguards that the participating hotels will put in a place a firm approach that will create a real added value without 'cheating' the system. Through this preference, hoteliers have expressed their desire to contribute to an effort of enhancing the Cyprus breakfast, which will be characterized by commitment on offering authentic experience in an organized manner and maintaining high quality standards. It is pointed out that the positive attitude cannot be treated in isolation from the concerns noted above and any proposition for a Cyprus Breakfast should consider both the positive attitude and the key concerns expressed.

4.8 Presentation and room decoration

(Question D5)

Based on an extensive list of photographs, taken from the breakfast buffets of 20 hotels (all photos presented in Appendix 11) the Project Team has made several observations which are considered positive or negative with respect to the establishment of the Cyprus Breakfast setting. These observations could be taken up in drafting guidelines for the dos and don'ts when preparing the presentation of the Cyprus Breakfast. The observations are subjective and based on the Team's views, aiming to point out key issues that need to be considered in the future, for a successful Cyprus Breakfast concept.

Non-use of local products with an EU approved quality mark

“Loukoumi of Yeroskipou” is one of the only two Cypriot products to have been granted with the European quality mark “PGI – Product of Geographic Indication”. From the sample of hotels selected only two have been identified to include the loukoumi delight in their menu and both hotels are located within a radius of 3 km from Yeroskipou, where the renowned loukoumi PGI is produced by a well known local supplier whose premises are also open to visitors. In the first picture, loukoumi is referred to as “Traditional Greek Sweet”, while in the second picture, no origin is designated. We have spotted ignorance by the hoteliers about the PGI mark and a preference over multi-product distributors who can supply amongst other products, the small volumes demanded for this product.



Non-labeled indigenous products



In the two pictures the breakfast includes two different indigenous varieties of grape, the “Mavro” in the left picture and the “Verigo” variety in the right. Both grape varieties have their own story to tell and are closely linked to the history and culture of Cyprus (eg verigo has been named out of the British exclamation ‘very good’ by the British colonial troops in the early 20th century when they tasted it). None of the two hotels from where the photos were taken designates the varieties with a tag or tells their story in any way.

Use of exotic fruit for decoration



The concept of the Cyprus Breakfast is occasionally supported by decoration with fresh fruit and vegetables; the use of Cypriot seasonal local products is much more preferable. The images above depict the seasonal local watermelon in contrast with an exotic pineapple, both of which have been used to decorate a Cyprus corner in different hotels.

Non-use of Cypriot dishes in cooking areas

We have observed several dishes being prepared by cooks at the breakfast buffets. However, we have not observed any cooking that is based on a Cypriot recipe or uses traditional ingredients which can in turn be presented and explained by the cook.



Mixing local with international products & dishes





Putting side by side Cypriot traditional dishes with those of international cuisine is a common characteristic in many hotels. Although this cannot be commented as a negative attitude towards a Cypriot breakfast character, it is noted that no special tag / label is presented in a manner which can 'introduce' the Cypriot product and 'bring it to the front', thereby communicating to the consumer the different flavors and tastes. In the pictures at the top, grilled halloumi is placed next to baked beans and bacon, while in the bottom left picture lountza and traditional sausages are placed together with German sausages, with no special tagging to highlight the Cypriot character and the invitation to a new and different flavor of traditional Cyprus. In the picture to the bottom right, fried halloumi cheese is placed along with American pancakes, a fairly incompatible combination, while tags are placed in reverse order. Although pancakes bear the name American, the same approach is not observed for halloumi, probably because hoteliers assume that consumers are expected to know that halloumi is Cypriot.

Non-labeled local products

Placing Cyprus products in the buffet without tagging is common in most hotels; the picture on the left shows carob syrup being placed untagged amongst tagged jams (*how can one expect customers to know what it is and how to use it?*), while the picture on the right shows halloumi, placed next to European cheese slices without a relevant tag.



Occasionally, tags are placed next to Cyprus products but there is no clear identification that it is a Cyprus traditional and there is no additional information about the product. The picture below shows a tag next to Fresh Anari Cheese, but the link to the Cypriot authentic gastronomy and its cultural value that can in turn trigger customer's appreciation is missing.



Certain fruit and vegetables used raw or in recipes, are most likely sourced from local producers and quite often bear a European wide fame eg red soil Cyprus potatoes from Kokkinochoria and Cyprus oranges. Especially in the Pafos-Polis areas, significant amounts of oranges are procured from nearby groves eg the well known Jaffa variety oranges of Argaka village. However, on the hotel buffets there is no special label stating the origin or the history of the specific products. Equally useful is the reference that can be made on Cypriot parsley that is used to garnish the potatoes, a major export item to European markets.



Tagging



Tagging does not follow a uniform design and each hotel selects different ways for specifying the products offered on its breakfast buffets. In the case of implementation of a Cyprus Breakfast concept, uniformity in tagging would be a critical factor in the effort's marketing and branding.

Non-fresh juices



Few hotels use fresh oranges and freshly squeezed orange juice, even during the period of availability of cheap local oranges. The use of suitable machines for consumer friendly, freshly squeezed juices could be suggested as a feature that relates directly to the concept of authenticity and provides an experience to the tourist in preparing the juice, while bringing them closer to the flavors and aromas of the Cypriot nature. The cases presented in the images above – offering bulk packaged juices of dubious quality and origin at breakfast – are fairly incompatible with the concept of the Cyprus breakfast.

Décor using traditional items



In most hotels, the breakfast area's décor follows the overall style of the hotel. However, some of the hotels manage to infuse into the the breakfast decoration, the Cyprus character using simple additions of Cypriot traditional items. Some good examples are presented in the pictures above: a painting of earthenware, widely used in the old days for storing food and wine, clay jars and wooden trays for serving traditional products and framed "tsestoi" for decorating the walls.



In some cases, although the hoteliers go through the extra effort to reinforce their traditional products with special decoration, the lack of awareness could lead to mispositioning of the items, based on their actual usage. In the picture on the left, traditional cheese moulds made from the bush *Juncus* sp. found on the river banks (named sklinitzia in Greek), decorate the bread area. It would be more appropriate to position these moulds with traditional cheeses as these gave the characteristic rings on their outer surface.

The picture on the right depicts the use of photo images (posters) behind the buffet, a creative approach which could be used to portray the particular regions of Cyprus from where certain products on the buffet originate from thereby triggering customers' curiosity to visit the place.

5. Evaluating consumer perceptions and preferences

5.1 Methodological tool

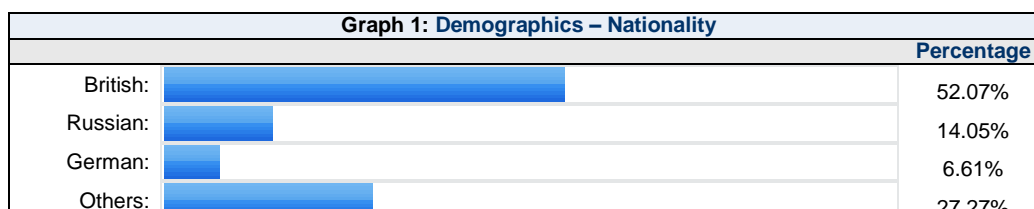
A survey among customers of Pafos and Polis hotels was carried out in order to capture their views on issues relevant to the concept of the Cyprus Breakfast. This work has given valuable additional information that has been used for the final proposal of the concept for the Cyprus breakfast. The bulk of the survey was executed in November and supplementary work was also carried from the 16th to the 21st of December 2013 using questionnaires in the English and Russian languages (Appendix 7).

Customers' profile: Although the majority of the tourists visiting Cyprus are British, the percentage of Russians is gradually rising. According to data by the Cyprus Statistical Agency, the percentage of the British visitors decreased from 51% in 2008 to 39% in 2012, while the percentage of Russian visitors increased from 7.5% in 2008 to 19.2% in 2012. German visitors hold a steady 6% of the tourism market and rank third in the nationalities ranking scale. Using data of tourist arrivals for the year 2012 (prepared by the C.T.O.) , we have noted that the region under study receives around 36% of the tourists visiting Cyprus and the breakdown in terms of nationalities is indicated in the table below. A noteworthy observation for the region is the high percentage of UK tourists, which significantly exceeds the island's average, with the concentration being much higher in the Pafos than the Polis region.

2012 figures issued by the CTO	Cyprus		Pafos/ Polis	
	Total number	%	Total number	%
UNITED KINGDOM	959,463	38.92%	508,011	56.75%
RUSSIA	474,426	19.25%	157,363	17.58%
GERMANY	144,407	5.86%	43,492	4.86%
GREECE	132,990	5.40%	25,027	2.80%

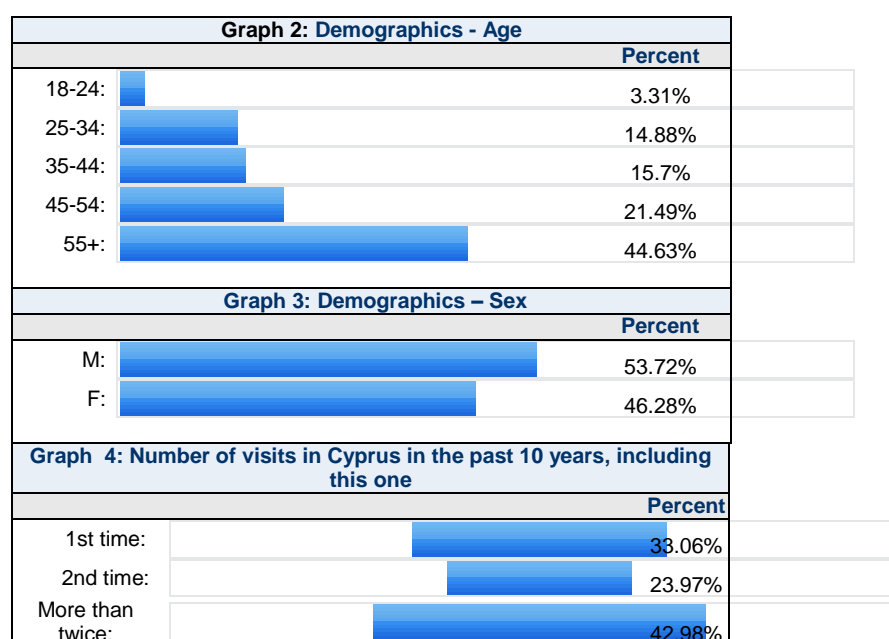
SWEDEN	117,286	4.76%	12,267	1.37%
OTHERS	636,336	25.82%	148,982	16.64%
	2,464,908		895,141	

With the above data as a reference point, a survey with 122 consumers has taken place aiming to capture a representative sample in terms of nationalities. The final breakdown in terms of the nationalities that make up the sample is indicated in Graph 1, below.



The demographic profile of the visitors is completed by the age and sex groups, presented in Graph 2. It should be noted that the majority of the participants are of age 55⁺, a result that was highly affected by the season during which the survey took place (November), a time when most holiday makers are retired people. In an effort to correct this imbalance, a minor part of the survey took place in mid-December, during which family holidaymakers visit Cyprus. A fairly even spread in terms of sex has been achieved (Graph 3) while the coverage in terms of the type of hotel preference has been covered by the spread of the survey which took place in 10 different hotels across the region and across the different star ratings.

Noteworthy is also the percentage of repeat tourists (Graph 4), a characteristic mainly of the British tourists visiting Cyprus in mid-Autumn. In our sample, 43% have visited Cyprus more than twice, a figure which may not be representative of the population for the Pafos region (no data is available to confirm this). However, we could regard this type of tourist an important one in being able to evaluate in a sound manner the authenticity of the breakfast and the need for possible changes. Due to the low absolute numbers in the age groups of less than 55+ years and the lack of adequate representation across age groups, no data analysis based on this parameter is presented, as it could not provide concrete conclusions.



5.2 Quantitative Analysis of responses

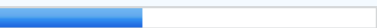
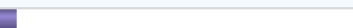
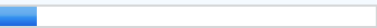
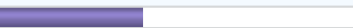

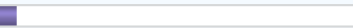




General Preferences and eating habits at breakfast: The first three questions were aimed at identifying the preferences and eating habits of customers, as well as the elements they value during breakfast. The great majority of respondents for Question 1 expressed their preferences in having a combination of breakfast types, an observation that is in line with hoteliers' views on their customers' preferences. The

Q1. Which of the following best describes the breakfast that you choose to eat at your hotel? (please select 1 option based on the dominant character of your food selection)



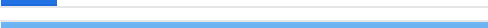

	Percent
English:	22.95%
European:	16.39%
Traditional Cypriot:	6.56%
American:	0.82%
A combination of all:	53.28%

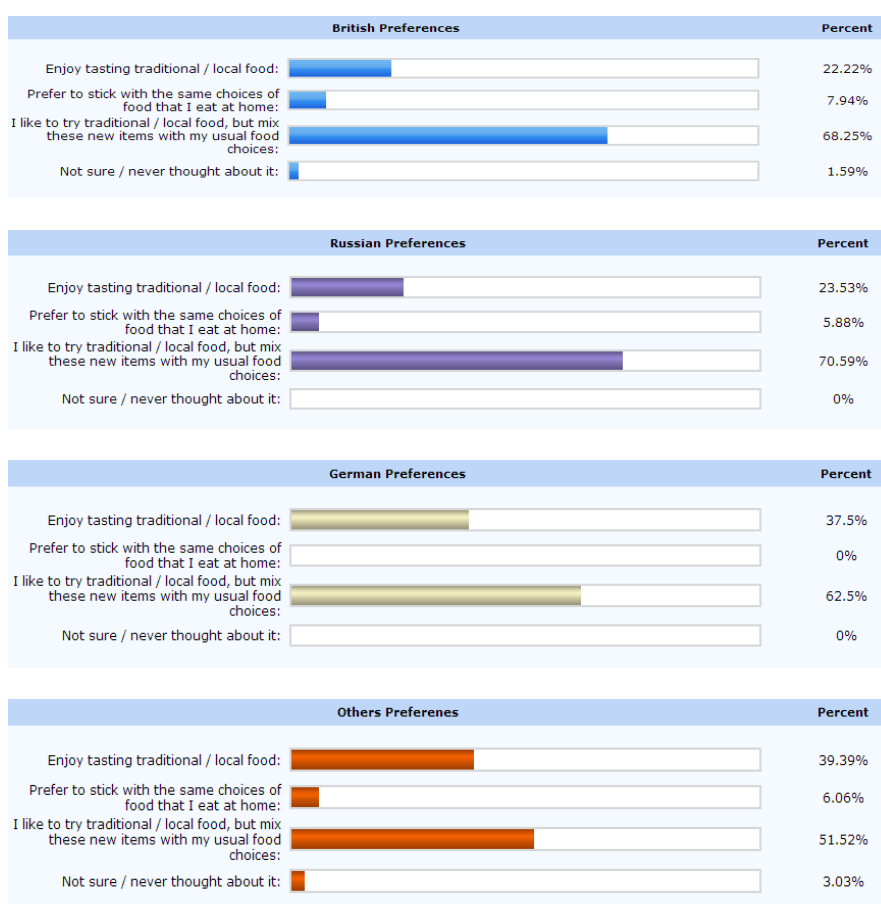
English breakfast ranks second at 23% while the need to have a fully traditional Cypriot breakfast is rated at 6.56%, a fairly low level. A further analysis based on the two major customer nationalities (see graphs below), raises the preference of the British over English breakfast, while Russians tend to prefer combination of the breakfast types, but

the overall performance for a purely traditional Cypriot breakfast is for both cases on the low side. What is important though to note, is that for both nationalities, the highest scores were obtained for the 'combination' option. The result verifies hoteliers' view that was recorded in Chapter 4 which claimed that many British tourists prefer to have the usual breakfast that they eat at home and that all the ingredients that make up the English breakfast should be present at the breakfast buffet.

British Preferences		Percent	Russian Preferences		Percent
English:		38.1%	English:		5.88%
European:		9.52%	European:		41.18%
Traditional Cypriot:		3.17%	Traditional Cypriot:		5.88%
American:		1.59%	American:		0%
A combination of all:		47.62%	A combination of all:		47.06%

The above conclusion is further supported by the results of question 3 in which customers were asked to describe their breakfast food preferences when in another country. The majority of the visitors, by a percentage of 63%, stated that they like trying out traditional dishes of local cuisine, so long as this is done in combination with their usual food choices. Moreover, an encouraging percentage of almost 29% replied that they enjoy tasting traditional local food, in contrast with the very low percentage of 6.5% who strictly prefer to stick with the same food choices they have at home. The case in favor of tasting traditional / local food is much higher with the German and the 'Other' nationality groups a point that is denoted in the graphs below and surprisingly the British and Russian choices seem quite similar.

Q3. How would you describe your food preferences when in another country		Percent
Enjoy tasting traditional / local food:		28.69%
Prefer to stick with the same choices of food that I eat at home:		6.56%
I like to try traditional / local food, but mix these new items with my usual food choices:		63.11%
Not sure / never thought about it:		1.64%



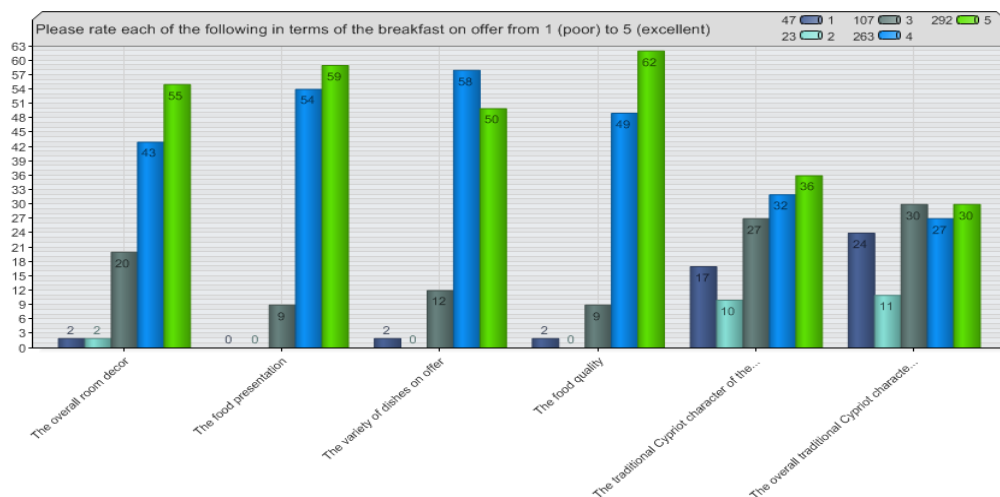
The conclusions reached are in line with the observations noted by the hoteliers, which are summarized in the following sentences,

- (a) *The British do like to taste traditional food on the side of their English breakfast plate*
- (b) *The Russians could eat anything served including traditional food*
- (c) *The German and Western European consumers deliberately want to taste traditional foods*

In question 2, customers were asked to evaluate their hotel's breakfast based on six criteria, four of which being rather general while the last two have a focus on the traditional character. The results indicate that customers are very much satisfied with what is on offer and the way it is presented. More than 80% of the replies rate the four criteria close to excellent. However, the level of satisfaction is reduced on the criteria related to the traditional character of the food and the overall setting. The results on these two criteria show a much greater spread in the ratings, a factor attributed also to the different hotels from where the sample was taken. The general picture as depicted in graph 1 shows a very positive overall impression on the four criteria that do not relate to the traditional Cypriot character issues and a less positive (close to average) view on the two criteria that are linked to the traditional Cypriot character. Another explanation though could be related to the very different approaches taken by hotels to promote the concept of traditional Cyprus, thereby resulting to confusion amongst visitors concerning what is actually Cypriot and traditional.

Q2. Please rate each of the following in terms of the breakfast on offer from 1 (poor) to 5 (excellent)					
	1	2	3	4	5

The overall room decor:	1,64%	1,64%	16,39%	35,25%	45,08%
The food presentation:	0,00%	0%	7,38%	44,26%	48,36%
The variety of dishes on offer:	1,64%	0%	9,84%	47,54%	40,98%
The food quality:	1,64%	0%	7,38%	40,16%	50,82%
The traditional Cypriot character of the food:	13,93%	18,2%	22,13%	26,23%	29,51%
The overall traditional Cypriot character in the room setting:	19,67%	9,02%	24,59%	22,13%	24,59%



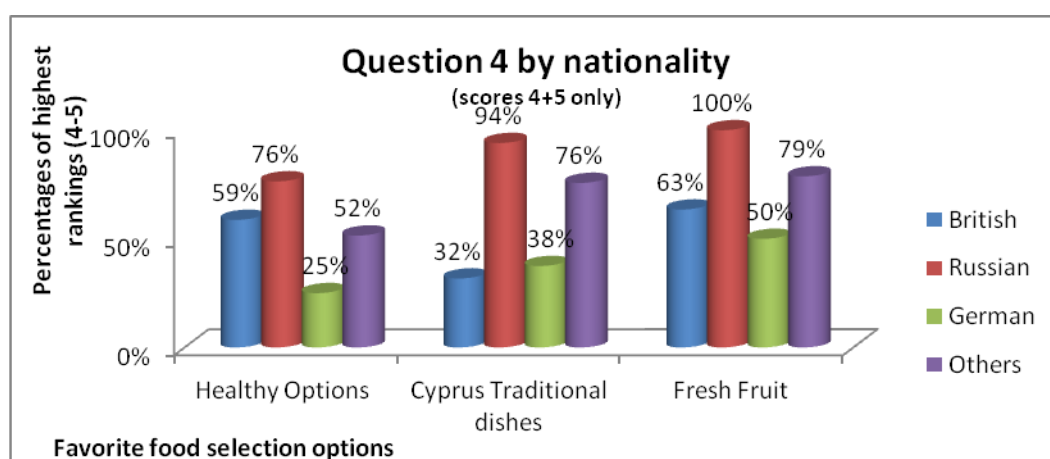
Food preferences when in Cyprus

Questions 4 to 7 have tried to get an insight into the food preferences when in Cyprus in order to receive a more in depth feedback on customers' needs. Question 4 asked customers to rate specific food choices according to their favorite food selection for breakfast during their holidays in Cyprus.

Q4. Please express your favorite food selection for breakfast during your holidays in Cyprus by rating each category in scale from 1(least favorite) to 5 (most favorite)					
	1	2	3	4	5
English Breakfast (e.g. eggs, sausages, bacon, baked beans):	13.93%	9.02%	14.75%	26.23%	36.07%
European-style items (e.g. toast, ham, cheese, cucumber, tomato):	20.49%	7.38%	22.95%	22.13%	27.05%
Gourmet Choices (e.g. smoked salmon, bagels, cream cheeses etc):	30.33%	4.92%	16.39%	20.49%	27.87%
Healthy Options (e.g. cereals, low-calorie yogurt):	16.39%	10.66%	15.57%	24.59%	32.79%
Cakes & Sweets:	37.7%	7.38%	18.85%	13.93%	22.13%
Mediterranean (e.g. olives, olive oil):	33.61%	9.84%	9.84%	18.03%	28.69%
Cyprus Traditional dishes:	27.87%	7.38%	12.3%	24.59%	27.87%
Fresh Fruit:	13.11%	6.56%	8.2%	23.77%	48.36%

Although the responses give a fairly mixed picture as they spread across all ratings, a few points stand out quite clearly,

- the greatest preferences are associated with the English Breakfast, a trend that follows closely the replies of question 1 and one that is affected by the high proportion of British customers in the sample
- interestingly, a high proportion of top ratings is noted on the categories 'healthy options' and 'fresh fruit – both categories follow the current trend for a healthier diet
- Cyprus traditional dishes score lower, yet more than 50% of the responses have rated them on the high score level (4 & 5) thereby showing their interest to try traditional dishes
- In examining the responses based on the age and sex parameters no substantial differences have been observed
- In terms of the nationality parameters, the British customers score the lowest values in terms of the high rating given as favorite food option on the 'Cyprus traditional dishes'. Conversely, 94% of the Russians have rated high the same option. The Russians also seem to rate very high the healthy options provided in this question – however due to the small sample size and the particular time during which the survey took place, we keep some reservations on this impressively 'healthy' behavior by the Russians.

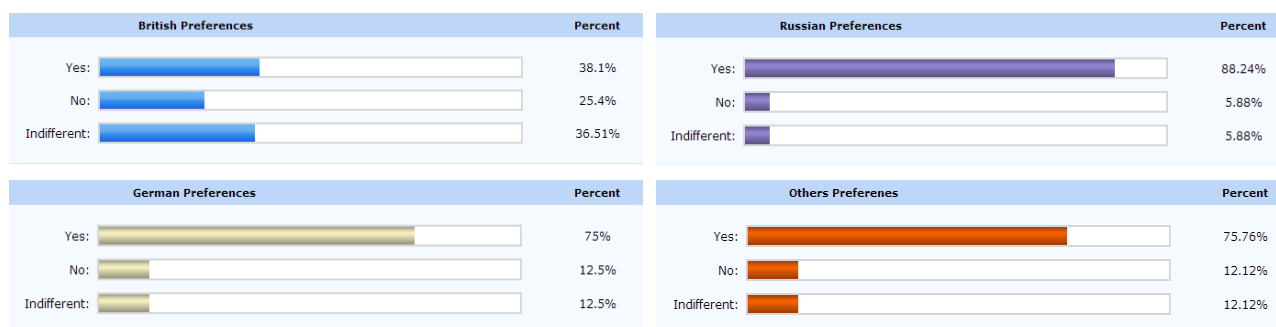


Although in question 1, respondents have rated the option of an exclusively traditional Cyprus breakfast quite low (at 6.56%), in question 5 where respondents are asked to express their interest for being offered a more distinct traditional character, positive replies have risen to 57%. A further analysis of question 5 based on the nationality parameter, indicates that the positive reply scores over 75% for all nationalities

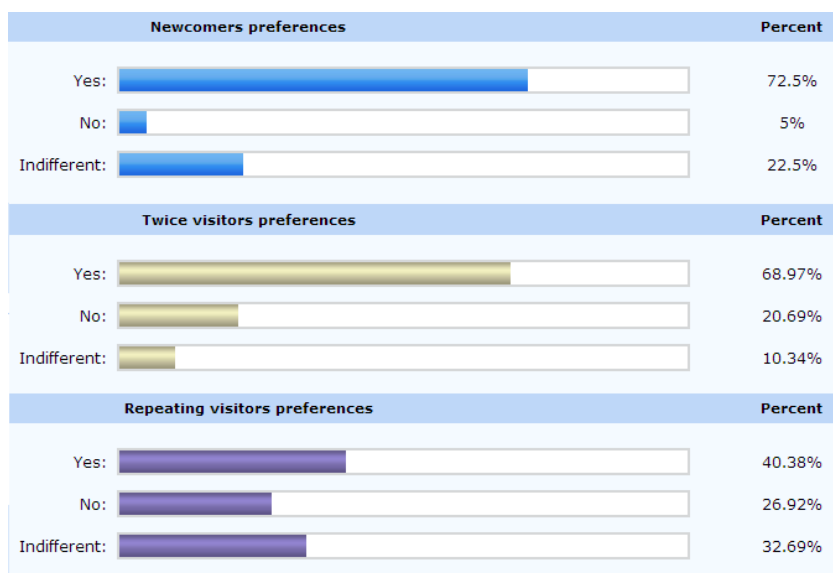
Q5. Would you like the breakfast options provided by the hotel to have a more distinct Cyprus traditional character?	
	Percent
Yes:	57.38%
No:	18.03%
Indifferent:	24.59%

except for the British which is at 38%. It is important to observe that around 61% of the British customers are satisfied or do not care about traditional Cypriot products in the breakfast buffet, compared to the respective responses by other nationalities

that do not exceed the 25% mark. Considering that the English breakfast is currently on offer, it seems that the majority of the British are actually offered exactly what they would choose to have – a point concluded from question 7 (see below).



A further breakdown of the replies in this question suggests that first time tourist visitors are far more interested to taste traditional products than customers who have visited the island more than once. In the graphs below, we note a marked reduction in the 'Yes' replies as customers visit the island more than twice. This response is also related to the nationality parameter as most repeat travellers in autumn are British. Yet, a more in depth investigation into the behaviour of repeat travellers is suggested for future research works, since this type of customers, (a) form a category of its own, (b) support the off-season tourism and (c) are important promoters of the Cypriot hotels in their respective countries.



Question 5 was further investigated (using question 6) with regard to the importance of several factors which could improve the Cyprus breakfast. It is apparent that the most important factor relates to the availability of local products whilst the use of items other than food (cutlery, crockery, tableware etc) is rated very low (14%). It is interesting to note that the availability of informative material related to the products, their source and their relation with Cyprus' history and culture seems to be an important issue, much more than simply labeling the food and where it is sourced from. A total of 39% of respondents have selected this option as one of the two most important factors for a more distinct character of the Cyprus breakfast.

Q6. If yes, how important is the availability of the following (please select up to 2 options)?		
Local products (e.g. olives, local cheese etc):		68.83%
Information / labels provided about where the food has been sourced from:		27.27%
Information on local food-related history and culture:		38.96%

Use of locally produced cutlery, crockery, tableware etc:		14.29%
Local recipes available to take home:		20.78%
If other, please specify:		1%

In checking the 'No/ indifferent' replies of question 5, it is clear by the overwhelming 91.3% that these customers are already quite happy with what is on offer. According to the nationalities analysis graphs, customers who pick this option are mostly British who have visited Cyprus more than twice, an observation that, as indicated earlier, could require further investigation in the future.

Q7. If No or Indifferent, please specify why (please select only 1 option)		
I am happy with what is currently being offered:		91.3%
I'm not interested in receiving information during my breakfast:		0%
I'm not interested in where my breakfast sourced from:		2.17%
If other, please specify:		6.52%







Understanding and identifying Cyprus' traditional breakfast

Question 8 aimed at identifying how customers perceive the concept of a traditional Cypriot breakfast. The answers outline that the perception of authenticity and locality in terms of products and recipes is rated high, while the thought of a guided tour around the products by a waiter that will be able to introduce them to the local cuisine, is also highly appreciated.






Q8. Which of the sentences below best describes your understanding of Cypriot traditional breakfast? Please select up to 2 options		
Authentic recipes:		29.75%
Authentic food products, made locally:		59.5%
A decoration that resembles closely the historical and cultural aspects of a traditional Cypriot house:		14.05%
Any recipe as long as it is made from locally produced ingredients:		28.1%
A friendly waiter capable of introducing and explaining about the local cuisine:		30.58%
Anything labeled with a specific logo as traditional:		10.74%
Other		3%

The decoration of the room scores the lowest percentages in term of how customers perceive the Cyprus Breakfast, an observation which suggests that customers focus more on the food and its information/ educational aspects rather than the decoration. In determining how customers would like a Cyprus breakfast presented, question 9 suggests that the most preferred options are, (a) have the products presented in a dedicated area and / or, (b) have products clearly labeled across the buffet. This question's replies seem to rule out (a) the option to avoid altogether any Cyprus traditional character and (b) the option of a fully Cypriot traditional breakfast. It is again noted here that customers would enjoy taking a bite of the traditional Cypriot cuisine and they would even appreciate an effort by the hoteliers to clearly label and identify the traditional food on the buffet. The decision on how to present Cypriot traditional dishes is not clearly denoted here but it appears that the top two options available can be combined, as the one can complement the other – an issue discussed further in the concluding chapter.

Q9. If your hotel decides to establish a breakfast dedicated to Cyprus traditional products, how would you prefer this to be offered?	
	Percent

Presentation in a dedicated area where traditional products are separated from the rest:		24.79%
Particular products or dishes are clearly labeled as Cypriot, but do not have to be in a special corner:		28.93%
The full breakfast menu is traditionally Cypriot (without any international variations / options) and is served once a week:		7.44%
The full breakfast menu (including any international variations / options), where possible, is made from local ingredients and is served daily:		18.18%
The full breakfast menu is traditionally Cypriot (without any international variations / options) and is served daily:		4.96%
Could be placed on the buffet along with other dishes:		15.7%
Do not wish to have any Cyprus traditional products in my breakfast:		0%

In the final question 10, customers were asked their opinion on how authentic Cyprus breakfast elements would be better recognizable in a hotel breakfast buffet. Equal in terms of preference, are customers' selections for a special (certification) logo and / or a clear and decorative signage. Respondents have again shown little interest for the decoration and the overall character of the restaurant. Conversely, they seem to show their preference on the food signage and the use of additional informative material on the historical and cultural aspects relevant to the products. Although informative material accompanying the dishes is considered useful, customers don't believe that it is sufficient to support such a concept.

Q10. Which of the following would help you most clearly identify a Cypriot Breakfast?		Percent
A special logo (confirming that an external body controls the traditional character and quality attributes of the food served) is present on menus and breakfast restaurant signage:		33.06%
Clear and decorative signage which provides information on the history / culture of the food ingredients:		33.06%
Information on the origin of the food ingredients:		16.53%
Overall traditional Cypriot decoration and character of the restaurant:		12.4%
Other		4.96%

The overall conclusions reached from the survey are presented in Chapter 7, along with findings from the rest of the research work.

6. Focus Group Discussions

6.1 Methodological approach

In the context of this project work, two focus groups have been organised aiming at two different target groups and organised around two different objectives.

Focus group 1 was targeted at the non-directly involved (to the industry) people, coming from academic and journalism sectors. The objective of this focus group was to get fresh ideas (with minds that are not restricted by the industry's constraints and daily anxieties) using a brainstorming approach on how to establish the concept given the problems and difficulties encountered. This focus group was organised on the 13th Of December 2013 at the training centre of the CTO with a participation of 15 people (see participation list in Appendix 7) and the invitation to participate was based on an informal approach where selection was undertaken by the project team based on a selective list.

Focus group 2 was targeted at the stakeholders who are directly involved with the hotel and tourism industry. Invitations were sent formally, to the organisations and associations that make up the hotel and tourism industry and the Focus Group took place on the 16th of December 2013 at the training centre of the CTO with a participation of 13 people. The delayed organisation of this focus group proved as an opportunity to present the final thoughts for the framework of the Cyprus Breakfast, in order to get a feedback from the participating audience.

This chapter summarises in a point form the key observations, concepts and suggestions that came out of these focus groups. A number of the key points that came out of the discussion have been taken into consideration by the Project's Team of Experts in drafting the final framework and the criteria that would eventually make up the concept for a Cyprus Breakfast.

6.2 Observations & suggestions noted from Focus Group 1

Travelers' preference shift: Considering the emerging needs of tourists and travelers, a consensus was reached claiming that people's preferences are shifting towards more simple and authentic destinations. Gastronomic tourism is rapidly expanding – from being the elite's choice of tourism to an experience demanded by the medium-upper classes of tourists. This means that the gastronomic elements necessary, would have to expand, from the luxurious and gourmet food to the authentic and traditional flavors that do not add substantial cost to the overall service on offer.

What is breakfast? Breakfast means something different for every person – people's breakfast is related with their culture, their personal diets and their taste preferences – BUT breakfast is for all: the beginning of the new day – a basic need, the first of the day. Especially on vacation: no one misses breakfast. It is the only meal of the day that you can ensure any hotel customer will taste.

Approach to the concept: In defining the objectives for setting up a Cyprus breakfast, the following points were noted:

- We want to support the Cyprus products
- We want to support and promote local producers
- We want to engage as many hotels as possible
- We want to promote our culture and tradition
- We want to promote the Mediterranean healthy nutrition

Although choosing the "strictly authentic products from local producers" and the 'strictly traditional recipes' that would change the whole menu to strictly Cypriot would sound more correct, this cannot be applied because it refers to a niche market, limits the number of hotels that can participate due to limited availability of products and could increase the cost of the breakfast to restraining levels as most Cypriot products are much more expensive than the imported ones. A few people expressed the wish that the Cyprus Breakfast could present what in the Cypriot language is named as 'mpoukoma', which is the slang word for the local breakfast; a word that encompasses in the Cypriot's thinking a local, rather rural breakfast. However, it has been widely accepted that this breakfast is suitable for the minority of tourists and certainly cannot be applicable across the hotel industry.

The Focus group came to the conclusion that the Cyprus Breakfast should have the following characteristics:

-
- Applicable to as many hotels as possible and acting as an umbrella theme
 - Co-exist with international breakfast choices but with special designation / logo – Cypriot-centered breakfast
 - Surprise customers with unexpected menus
 - Promote seasonality
 - Force customers to be engaged with the preparation procedure
 - Not strictly authentic recipes but use of products that are promoted through the label and through other informative material
 - Impose certain quality criteria for products and promote as best as possible products of Cyprus origin
 - Create synergies with local producers/communities in order to increase variety and authenticity of the breakfast without increasing cost by promoting certain products
 - Utilize experienced chefs to create a book of recipes that will use traditional products as a guide for chefs of the hotels, thereby ensuring similar flavors in all certified hotels
 - Guidelines for decoration in order to avoid low standard, poor decoration
 - 2-week rotating menu – intriguing customers with “traditional meal of the day”
 - Traditional shops – shop in shop – adding value
 - Engage chefs, nutritionists
 - Seek expertise support from ‘food stylists’, this term refers to artists (usually photographers) who can support the hoteliers in attractive displays of the traditional products, providing settings that are very much tied to the local culture. As an example, we refer the reader to page 29, where a photo shows the cheese mould in the bakery section.

6.3 Observations & suggestions noted from Focus Group 2

Focus Group 2 was presented with the broad objectives and goals aimed by the Cyprus Breakfast and then discussions were undertaken on a provisional list of proposed criteria and characteristics that would make up the concept possible to implement.

Locality: The definition of what is local cannot (legally) exclude the big Cypriot suppliers or even the imported produce in favor of the micro-producer in any product. Furthermore, any guidelines that will aim to substitute existing suppliers with micro-producers cannot be realistic in terms of implementation as this will create unnecessary difficulties to the hotels for reasons related to procurement selection criteria – discussed extensively in Chapter 4.

Cost: All respondents agree that for many product categories, local supplies are very expensive eg honey, marmalades. For other products such as halloumi, the cost of a typical authentic local halloumi is more than twice the price of an industrially made one. Therefore, the support to the local production is limited by the very high price differential which is also accompanied by other factors such as volume reliability, product range etc.

Reliable suppliers in volume/ quality/ price: Hoteliers who manage chain companies insist that procurement practises that are currently executed centrally with strict annual plans cannot downgrade these selection criteria for participating in a Cyprus Breakfast scheme. Yet, they are happy to see a few authentic products that are usually low in demand from customers to be included in the breakfast menu and be procured from small local processors (examples cited are seasonal jams from indigenous Cyprus fruit).

Traditional Product portfolio implementation: The Focus Group was presented with a provisional list of products which are suggested as a menu for hoteliers to make up their traditional product portfolios. Some stakeholders suggested that the concept implementation in terms of the traditional product portfolio should start with a few items only and pick up gradually. This would allow both the hotels and the food supply chain to adjust to possible additional supply requirements. Other stakeholders believe that the Cyprus Breakfast concept should be introduced without any compulsory product portfolio requirements. These could remain for some time as voluntary guidelines and incorporated, at some point in the future, as part of the compulsory criteria. It was further supported that this criterion could also act as the key factor for granting different grades of the Cyprus Breakfast, linked to the intensity of authentic products offered.

Objectives: Stakeholders agreed that the Cyprus Breakfast must,

- Improve chefs' capabilities to work innovatively with traditional products, as this could improve the authenticity of the breakfast and possibly even reduce the cost, since some products could be used as ingredients in recipes rather than in raw form with the same positive impact.
- We must use this concept for attracting tourism with higher incomes and better spending capabilities
- We must link the traditional taste to the Cypriot heritage
- Hoteliers can capitalise on the communication potential of the Cyprus breakfast for meeting the ethical obligation of supporting the deprived communities, and for triggering customers' interest in visiting the Cypriot rural regions.

Stakeholders also admit that the Cyprus Breakfast could in the future, given its successful implementation, provide the ground for the use of environmental sustainability criteria in the food procurement process. Furthermore, it could prove as the starting point for a new strategy on Food Tourism, an issue though that needs further investigation.

7. Concluding observations and framework clarifications

7.1 Hoteliers perceptions summarised

Hotel chains Vs individual hotels: One should review buyers' behaviour by looking at two distinct categories, which by definition create two different types of behaviour; hotel chains and individual hotels. In the former case the buyers' decision making is centralised and the procurement methods are based on annual planning. Both the breakfast planning and the supplier selection takes place once a year and the decision making is based on three parameters that could be ranked as (1) reliability on required volume availability, (2) Price, (3) Quality. Other factors are also very important for reducing the administrative cost of procurement such as broad geographic (distribution) coverage and wide product range. Because of their high volumes, hotel chains would not rank the place of origin high on their list eg they would buy marmalades which are local and / or imported so long as the above decision parameters are satisfied, the

case usually being that they end up buying produce for which the place of origin is not really known. In the case of individual hotels, buyers have a greater freedom to change the menu, introduce new dishes or procure occasionally from various sources, yet the price constraint is a key factor in determining their procurement decisions.

Therefore, there is a distinct difference in the procurement approach as well as in the constraints and limitations of the breakfast selection between these two types of hotel operations. These differences and the constraints/ limitations that guide buyer behaviour must be taken into account when designing the Cyprus Breakfast. Should we aim to include hotel chains in the proposed concept then their behaviour is a limiting factor to any decision. The cost factor is an important issue in selecting suppliers but in the case of hotel chains the adequate availability of volumes and the reliability of suppliers to offer volumes and quality is critical.

Supplier Base: One can identify significant co-operation with local producers (local implies Cypriot) to a level which could broadly be seen as approaching 60%. However, this by no means supports the authentic character since local producers would (a) supply locally made products of non-Cypriot character eg ham, (b) supply products which are both locally made and imported depending on the volumes needed, the seasonality of supply eg jams, (c) supply imported products in an effort to cover the full range of products needed in a category eg edam cheese by local cheese makers. The case in favour of local suppliers becomes even more complicated when considering that intermediary distributors are part of the supply chain. Distributors may be offering both local and imported products and they could be buying from various sources or supplying products which could be typical of a Cyprus character but not being Cypriot in origin eg olives and olive oil. For example, hotel chains would prefer to deal with fruit and vegetable distributors (traders) with an island wide coverage who procure both locally and import produce. So long as the price and quality of the products are in line with hotel needs, the origin of the goods is not part of the selection criteria. The case in favour of micro-local producers, at regional level is identified in a few individual hotels but this is recorded as minority behaviour.

Local, Cypriot, EU, non-EU products, is there a way out? From the outset, a controversial issue related with the implementation of a Cyprus Breakfast, is the use of locally made products. This issue is associated both with the authenticity of the products served and the indirect impact of providing support to the local communities. What is really local is hard to define and certainly no one can exclude industrially made Cypriot products from the ones made locally by micro-producers. Neither can one ignore the factors that affect the procurement decision, other than price e.g. consistent supplies, wide geographic and product coverage. Furthermore, in a globalised market where key players in the supply chain are both producers and importers or where intermediate distributors have a stronghold, the imposition of limitations with regard to the origin of the product would upset the F&B procurement system and create unnecessary barriers to the proposed new concept. A way out must be proposed in which hotels would support the local communities through the Cyprus Breakfast without intervening with the procurement system.

Chefs and staff knowledge for local and traditional products: Chefs are reluctant or do not have the push by management to innovate using traditional and authentic products in creating new recipes. Chefs and the staff are also unaware of the characteristics, nutritional attributes and cultural values of Cyprus traditional products and the local gastronomy. This creates a lack of communicating traditional products in the form of storytelling, thereby infusing the cultural aspect into the breakfast experience.

Understanding the meaning of Cyprus breakfast: Allowing the hoteliers to suggest their thinking about Cyprus Breakfast, their understanding has been limited to the breakfast buffet and the options available to

introduce more traditional or local products. The concept of traditional breakfast is predominantly related with food rather than with the room decoration or with informing and educating the customer, although when asked to suggest improvements, the educational aspect is treated positively.

Effort to promote the Cyprus character: An effort to promote the local character in hotel breakfast is noted in most hotels by adding some products in specific corners or by incorporating into the buffet some authentic traditional products – often though positioned next to international dishes. The overall impression leads to the conclusion that hoteliers are in the search for infusing authentic flavours into their breakfast, and efforts are being made both by small hotels and by hotel chain companies. There is a very positive approach, reaching an almost unanimous agreement that the development of an umbrella concept will enhance their efforts and add to the product differentiation they are trying to achieve.

7.2 Consumers' perceptions summarised

Categories of customers: The survey has confirmed hoteliers' views that there exist three different types of customers based on their nationalities, with their respective behaviours:

- The British who want to have the options of an English breakfast but who would also pick some traditional food if placed on the buffet
- The Russians who would like to have an international buffet mixed with traditional food but the authenticity aspect is much less important than the food itself
- The Germans and Central European customers who would deliberately want to have the experience to taste authentic Cyprus products and dishes and who would appreciate the informative and educational aspects.

A common denominator in all categories is their positive interest, in a scale ranging from 22% to 40% to be able to taste Cyprus traditional foods, leading to an arbitrary consensus that the hotel breakfast buffet should include Cyprus traditional products by around 30%.

A probable 4th category of customers are the repeat hotel customers for whom it is suggested that further investigation into their food preferences should be considered in the future.

Evaluation of current breakfast: Customers have expressed a positive view (close to excellent) on the current status of the hotel breakfast based on a set of general criteria, but they seem less satisfied by the availability of traditional foods. This is also supported by the high proportion of respondents who would like to see a more distinct authentic character in the breakfast. A very high proportion of non-British customers (exceeding 75%) are interested to see a more distinctive Cypriot character in the breakfast menu. It appears that the current breakfast menu is more aligned to the British preferences (a nationality that makes up 58% of the tourism industry in Pafos). Yet, a strategy of shifting towards a broader customer base in terms of nationalities would require the presence of 'authentic hotspots' in the hotel services, such as the Cyprus Breakfast.

In what ways to improve the Cyprus breakfast: Customers are suggesting that the greater availability and the better presentation of local food in the breakfast buffets is the key to a better authentic breakfast. Factor such as the room decoration, the tableware, cutlery etc are very low in importance – possibly though a response that is affected by a satisfaction expressed on the current room decorations and the general room atmosphere. The project team of experts holds the view that indeed the general breakfast room decoration is set at high standards across the hotels interviewed, a possible reason for explaining consumers downgrading of this factor.

Besides food, customers wish to be more informed and educated on the historical and cultural aspects of the Cyprus traditional food. This observation could be seen as a great potential for the Cyprus Breakfast to act as a communication channel for promoting the local gastronomy and the different products and services around it as analysed broadly in the diagram of Appendix 1.

How to present the Cyprus traditional products: There seems not be a clear consensus on whether to present traditional products in a separate side of the buffet or spread them in with the rest of the dishes. Responses from customers are mixed as is the case from hoteliers' views on this issue. What seems certain though is the need to have more clearly identified products using labels, logos and other information material. Although 33% of customers have supported the view for having product signage along with a firm certification scheme, to most customers the enforcement of a strict certification scheme is immaterial. What is most important is the improvement in the range of local products, the clear signage and the supportive information, through which products can 'tell their story'.

7.3 Other Stakeholders' perceptions and expectations

Association of Executive Chefs (meeting with Mr P. Hatzitofis, association's president): The Association admits that its members lack expertise and training in what traditional products are and how to use them in the breakfast menu (and generally in making authentic recipes). They do stress though the point that hotel management does not give the necessary incentives for training or rewards for the effort of cooking innovations using 'Cyprus traditional products'.

HORECA departments in major distribution companies (meetings with C. Stratis, HORECA director, Cosmos-Laiko Distributors and C. Chionas, Amalia Ltd): Any distribution company is ready to include in their product portfolios any traditional products, thereby supporting micro-producers in their efforts to distribute their products, yet they are very much concerned that the price differential with industrially made or imported products and the low production volume capacities are negative factors in meeting their customers' requirements.

Agrofood Associations & the Cyprus Chamber of Commerce and Industry (meeting with A. Andreou, secretary to agrofood associations at the CCCI): Agrofood suppliers hold the view that every effort possible should be made to include in the Cyprus Breakfast, products of Cyprus origin only, irrespective of who is the supplier in terms of size or production capacity. Any approved producer should be freely available according to market forces to supply the hotel industry and claims that some products are more traditional than others are based on subjective criteria that cannot fit in the market.

7.4 SWOT analysis

Strengths	Opportunities
<ul style="list-style-type: none"> • Efforts are already under way by many hotels in establishing a Cyprus breakfast menu • A wealth of information material on the history and culture of Cyprus traditional products has been developed through research funded programs^{19,20} • The general food quality, room decoration and food variety is rated high by customers 	<ul style="list-style-type: none"> • A Cyprus Breakfast can open up a new cultural approach and provide a push towards a quality upgrade in the hotel breakfast • Any tool for differentiation should be seen as an opportunity in escaping from the vicious circle of price competition and squeezed margins • A Cyprus breakfast can support the effort of

¹⁹ <http://www.cyprusfoodndrinks.com>

²⁰ <http://foodmuseum.cs.ucy.ac.cy>

<ul style="list-style-type: none"> • Hoteliers by more than 90% believe that a concept of Cyprus Breakfast would improve their tourist product • It has been observed that a great proportion of products used in the breakfast are of Cyprus origin 	<p>the CTO to promote food tourism and the various efforts undertaken already to support this eg wine routes</p> <ul style="list-style-type: none"> • A Cyprus Breakfast can offer much greater support to the local producer in a period of deep economic downturn • The new programming period 2014-20 for establishing policy instruments under the Structural funds, can provide a possible funding tool for support
<p>Weaknesses</p> <ul style="list-style-type: none"> • Weak food tourism branding image in the world travel market • Lack of knowledge on the cultural and nutritional values of local products • Inability to communicate the cultural and nutritional aspects of the traditional products • Low innovation by chefs in using traditional foods and creating new unique recipes for breakfast • Absence of active support by hotels to the local micro-producer and the local community with regard to food and gastronomy • Limited volumes availability for many products by Cypriot producers • Non-competitive prices by local producers for many products 	<p>Threats</p> <ul style="list-style-type: none"> • Inability to capture the emerging trends on authentic experience, caring for the environment and the people in need • Weakening of the unique selling propositions vis-a-vis close competitors • One-sided cost focus squeezes profit margins and does not help attract consumers who demand authentic vacations and at the same time are high spenders. • Lack of authentic experiences such as the Cyprus Breakfast may continue to play a negative role in attracting Central European consumers.

7.5 Key considerations

How high do we raise the bar? A critical decision that would significantly affect the design of a framework for the Cyprus Breakfast is related to the targets we wish to set in terms of the three key impacts, namely



authentic and traditional food, support to the local producer and sustainable production methods. It is clear that the stricter we set the rules the more likely we are going to reach the highest standards in terms of the above impacts. However, the higher we raise the bar, the fewer the hotels that would most likely be willing to support the concept. Furthermore, the higher we set the standards, the fewer the customers that would appreciate the concept, these being traditional food lovers - a type of

tourism that is currently a minute, niche market for the Cypriot hotels. The decision on how high to set the bar is a critical one as we have identified, through this research work, significant limitations and constraints

into the authenticity and identification of place of origin for many products. Furthermore, setting the bar high would most likely be an impossible task for many hotels that currently struggle to survive in a price sensitive market.

Do we aim for an umbrella concept, suitable for the wider tourism industry or do we take a niche market approach? It is the Project Team's view and one that has been taken up positively in both focus groups that a concept of Cyprus Breakfast should aim for the wider tourism market. Although not stated exclusively in the tender documents, the Project Team understands that the Destination Partnership is looking for a concept that would be welcomed by the broader tourism industry rather than heading for the support of a niche market. Furthermore, the Cyprus tourism industry is highly price sensitive and attracts consumers that are, on average, less inclined to have truly and fully authentic Cyprus tastes. Besides, a dedicated gastronomy food traveller is by default a niche rather than a mainstream market.

Should we aim for the support of the hotel chain companies? The decision in favour of creating an umbrella concept, targeting at the wider tourism industry, implies that it should consider seriously the constraints and limitations identified by the whole industry, considering the differences between hotel chains and individual hotels. In fact, when considering the different buyer behaviours among hotel chains and individual hotels, the limiting factor is related to the procurement parameters, constraints and price considerations expressed by the major hotel chain companies, whose support is a key factor for success. In the Pafos / Polis region, the hotel chain companies control approximately 45 % of the accommodation capacity, a figure that cannot be ignored when considering the implementation of this new, umbrella concept.

Should we prioritise the support to the local producer and the local community? The discussion in previous chapters has highlighted that on the supply side, it is almost impossible to demand from the hoteliers to explicitly support the local producer. It may also be stated that leaving the decision making process to the rules of the market is a better approach, since this behaviour cannot be easily upset by external rules, imposed by the concept of the Cyprus Breakfast. Furthermore, the local supply issue is a complex one, as local producers may also be importers and/ or producers of industrially made products of non-traditional character. It is the Project Team's position that the free market, as it currently works, is an adequate system for the procurement process and should not be intervened substantially in the process for the Cyprus Breakfast.

However, the concept of a Cyprus Breakfast could be used as a link with the local community, both as a marketing tool and an ethical need which could be greatly valued by the tourism industry. In this case, the terminology used when referring to the local community is seen as a support to specific regions of Cyprus, usually sub-rural, or rural regions that are in need of support from the main poles of attraction that are located close to the coasts of Cyprus.

Shall we specifically aim to capture the wider sustainability issues? During the course of this research work, sustainability issues have been evaluated as part of the proposed concept. Sustainability was specifically studied under three implementation options, their selection being based on literature reviews and current experiences on the use of sustainability parameters applicable primarily to the food industry.

- (a) Use of organically produced food: Hoteliers are reluctant to include organic products (either local or imported) in the breakfast menu, due to the high price differential (estimated at more than 250% compared to conventional foods) and the limited available supplies. Moreover, hoteliers unanimously

support that the use of organics is not adding value to the breakfast menu that can be appreciated and paid for by the great majority of tourists in Cyprus.

- (b) Procuring from suppliers, accredited with environmental certification schemes: Many leading suppliers in Cyprus have been accredited with the EMAS (European Eco-management and audit system) and/or the ISO 14001, schemes which provide a proof for the sustainability concerns of the organisation. Demanding from suppliers to possess such certifications is an easy to implement approach which adds towards a breakfast that is caring for the environment. However, a great majority of agrofood SME's and especially the local micro SMEs, are not yet ready to adopt such schemes. Furthermore, this will most likely be seen as a hostile barrier as it will disrupt the current procurement processes to a great extent.
- (c) Use of products that reduce CO2 emissions: This is a far reaching goal as current practises in Cyprus have not adopted such schemes and no Cypriot product has been registered as carbon free or carbon neutral. Working around sustainability issues with a basis on CO2 which in turn will be linked to the proximity of the supplier is a difficult and complex issue as a multitude of factors need be considered. For example, procuring from a local cheese maker may not necessarily imply less CO2 emissions if one considers that for the production of cheese, significant volumes of animal feed is imported and significant amounts of water need to be used up, frequently by pumping up water from deep boreholes using fossil fuels.

In evaluating the factors that affect hoteliers purchasing decisions, it is concluded that sustainability issues and specifically sustainable production practises are not currently part of the selection process. Indeed, it is a difficult task to impose sustainability issues without adding significantly to the cost of the breakfast composition. It should also be noted that the task of enforcing sustainability issues into the breakfast menu is a task that will put great cost in managing the concept (in terms of compliance).

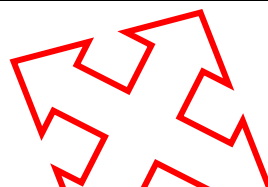
Shall we provide guidelines for a loose framework or suggest a firm certification scheme with specific criteria (compulsory and voluntary)? The answer is given both by the hoteliers and the consumers during the field works executed. Hoteliers have shown their preference for a firm certification scheme in order to safeguard the proper execution of the concept and to maintain certain standards in what can be seen as an umbrella brand that shall improve the value offered by Cyprus hotels. Customers have also been positive (by 33%) in the identification of the concept through a certification scheme.

8. A proposed framework for establishing the Cyprus Breakfast



8.1 'Cyprus Breakfast' is the communication tool for Food Tourism

Earlier in this report, we have positioned the concept of the Cyprus Breakfast as falling within the broader definition of Food Tourism. Deliberately though we have not positioned this on the Food Tourism diagram that we have developed and



present as Appendix 1 since it seemed quite unclear as to how it could fit as a subset of Food Tourism. Yet, its place in Food Tourism is an issue of great importance for it is the only service that will be experienced by all hotel customers when in Cyprus. Whilst for all subsets of Food Tourism, there needs to be an intention on behalf of the visitor to travel to or experience, the breakfast buffet is the only part of Food Tourism from where all hotel visitors will pass through. This theoretical approach has led us to the conclusion that the Cyprus Breakfast is a powerful communication tool for promoting all subsets of Food Tourism. This thinking has also been backed by discussions at the Focus Groups and may help in opening up new, novel ways for promoting the Cyprus gastronomy and the services associated with it. Referring to the diagram in Appendix 1 and reproducing it partly above, we fit the Cyprus Breakfast as the arrows that represent its role as the communication channel for promoting the Food Tourism subsets to the foreign visitor. Under this theoretical approach, one can open up new promotional tools, explained here using specific examples:

- (a) Organisers of local food festivals eg Kyperounta village apple festival, can offer a quantity of local apples to selected hotels for serving at breakfast during the period of the festival. This provides a win-win situation in which hotels show their support to the local community at no cost, while the festival organisers achieve a most targeted promotion at a very low cost
- (b) Traditional products available at the breakfast are also displayed in a hotel shop, whose suppliers are local micro-producers (irrespective of who supplies the products for the breakfast). Visitors who have the chance to taste and be informed about their particular authentic attributes and usage possibilities can be tempted to buy and take home, thereby increasing the revenue to the hotel and supporting local suppliers.
- (c) Offering bread made with commandaria wine as a basic ingredient (a product served at the focus groups for demonstration) is a vehicle for informing hotel residents about the commandaria region and the Commandaria Wine Route, therefore prompting them to travel the route, thereby benefiting the particular rural region and the producers of commandaria.
- (d) Presenting unique flavours with carob that is supplied by a specific producer who in turn offers cooking lessons (at the hotel or at the business premises) with carob may enrich the experience associated with carob and increase the revenue for the benefit of the local supplier.

This conclusion is subsequently used in designing the Cyprus Breakfast framework and specific criteria in the following section have been developed specifically as a result of this theoretical finding. Its value as a communication tool to develop the Cyprus gastronomy tourism is importance in the sense that Cyprus cannot claim to be a known gastronomy tourism destination. A recent report²¹ emphasises that *‘several studies have found that tourists travel to those destinations that have established a reputation as a place to experiment with quality local products’*. Bearing in mind that Cyprus does not belong to the *‘influential destinations whose brand image is connected, with varying levels of intensity, to gastronomic values’*, the use of Cyprus Breakfast as the source to communicate the gastronomic its treasures is critical in establishing a Food Tourism product.

8.2 Suggested criteria for the ‘Cyprus Breakfast’ implementation

Based on the results and findings of this research study, a set of criteria has been developed, aiming to provide the basis for establishing the framework for this concept. Although this study proposes 12 criteria, it

²¹ UN World Tourism Organisation, 2012; Global Report on Food Tourism, p8

does not imply that all should be mandatory. Rather, it falls into the views of the Cyprus Destination Partnership whether to drop some of these or leave them as voluntary. However, turning some criteria as voluntary is an issue that must be treated carefully as it may impinge the standards set for introducing the concept. The guidelines suggested below are also linked to a set of goals that need to be achieved through the implementation of the Cyprus Breakfast which in turn are derived from the issues noted in Chapter 7.

Communicating the history, culture and nutritional value of the Cyprus Breakfast

1. Each hotel is obliged to place information material (brochures) at an easily accessible place in the breakfast room. The information material will be produced collectively by the Organising Body.
2. All staff working in the breakfast must receive training on the value of traditional products offered on breakfast. The training will be provided by tutors approved by the Organising Body, with proven experience on the history, culture of the Cyprus gastronomy. A separate subject on nutritional aspects should also be provided and the staff will receive a training certificate.
3. Adoption of the **“breakfast guide”** concept – a person with appropriate training, dressed in a Cyprus Breakfast suit, can offer a guided tour around the breakfast, explaining the products and the recipes. It is proposed that the satisfaction of this requirement can be left to the individual hotel to decide as to how to implement eg designate a person who welcomes visitors and circulates the product information; assign a waiter with additional guide obligations; dress up a trainee chef who will be helping customers at the Cyprus buffet, introducing the day’s special and providing the information material.

Training in the use of local products in the kitchen

4. The cook should receive training on the use of local products, their utilization in the kitchen and their characteristic traditional combinations. Following the training course a certification for ‘Traditional Breakfast preparation’ will be issued by the Organizing Body.

Welcoming gesture

5. Obligation of the participant hotel to state the “welcoming” ways, that should coincide with customs and/or promotion of local products e.g. sprinkling with rosewater, plate on the table with bread, olive oil, olives and oregano

Presentation of authentic Cypriot products / recipes

6. Each hotelier must select from a list, prepared and submitted herein as Appendix 4 of indicative Cyprus products that can be used to describe the Cyprus Breakfast concept. This list is based on the product categories presented in the next section of this report from which the traditional product portfolio will be compiled. It could arbitrarily be suggested here that potential users of the Cyprus Breakfast brand should compile a **‘Cyprus Traditional Breakfast Portfolio’** from at least 6 categories, picking at least 2 products from each category (these products could either be selected from the list of Appendix 4 provided or suggested by the applicant and justified accordingly). The selected products that are characterized as authentic Cypriot, traditional or local, should be placed in a special area on the buffet or, if placed amongst others, should be designated by specific labeling with the assigned logo, the name and a brief description. The hotel must ensure that the Cyprus traditional buffet is labeled distinctively with the logos and brand guidelines of the Cyprus Breakfast.
7. The concept of **“Cypriot day’s special”** is proposed, according to which a different dish – authentic Cypriot recipe or international cuisine recipe with traditional Cypriot materials – is presented every

day, along with special decoration and referrals to the history, culture and characteristics of the key product ingredient.

Coexistence with international cuisine

8. Hotel management and chefs are urged to blend international dishes with local / traditional products. These should be distinctively marked, with reference to the materials used.

Seasonality

9. The hotels will have to choose from a list of seasonal product (weeds, seasonal cheese & dairy, fruit etc) and commit to use them during the desired period.

Decoration

10. The hoteliers will have to choose from a list of characteristic traditional items which they will use for the decoration of their breakfast halls / areas and accept not to use certain objects which could be rated as non-acceptable by the Organizing Body in terms of promoting the Cyprus tradition (eg plastic fruit decorations).

Supporting the local community

11. ***“Adoption of local communities”*** by which hotels commit themselves to support through the breakfast setting, specific rural regions (communities cluster) and accept to freely promote their gastronomy, and the local producers through the breakfast menu by:
 - promoting gastronomic events through breakfast
 - promoting (if possible) local micro-producers at the Cyprus breakfast buffet using specifically the producer’s name
 - give priority and make every effort to provide space for the presentation and promotion of their products eg in providing rooms for cooking lessons or in offering weekly promotion stands
 - evaluate the potential for a shop-in-shop concept for the local products in the hotels’ premises


Complaint and evaluation

12. During breakfast, there should be available (a) a customer satisfaction form and (b) a customer complaint form and these will be prepared by the Certification Body and records must be kept by the hotelier and submitted to the organizing body at regular intervals.

8.3 Product categories for making up the traditional product portfolio

The list below presents the product categories that will be used in making up the ***‘Cyprus Traditional Breakfast Portfolio’***. The categories are further presented in Appendix 4, giving specific examples of traditional products that fall in each of these categories and indicating also in which of the food categories described earlier in Section 2.4 they fall. An applicant hotel for joining the Cyprus Breakfast should pick the categories and the products from the list of Appendix 4 or suggest alternatives, giving adequate justification for including them in the portfolio. It is important to note that on the table of Appendix 4 additional notes and limitations are proposed, for each product category, aiming to safeguard the authenticity and local character of the products. Although, the Cyprus Breakfast does not limit any hotelier with regard to the origin of the products on the buffet, for most of the items that will make up the list of the Cyprus Traditional Product portfolio and therefore be labelled as such on the breakfast buffet, they should be produced in

Cyprus and procured from Cypriot suppliers. To clarify this further with an example, hoteliers could use any marmalade on the buffet, irrespective of the producer or the country of origin. However, a marmalade that shall be presented at the Cyprus corner or that will be labelled with the 'Cyprus breakfast logo' must conform to the limitations suggested on the table of Appendix 4, a key limitation being that it should be of Cyprus origin.

- | | | |
|--|---|---|
| <ol style="list-style-type: none"> 1. <i>Cheese</i> 2. <i>Non-cheese dairy</i> 3. <i>Carob</i> 4. <i>Cured meats</i> 5. <i>Spoon sweets</i> 6. <i>Honey</i> 7. <i>Olive</i> 8. <i>Grape and grape juice food</i> 9. <i>Herbs (for herbal teas and garnishes)</i> 10. <i>Fruit commercially grown</i> 11. <i>Vegetables commercially grown</i> 12. <i>Marmalades</i> 13. <i>Juices</i> 14. <i>Fruit and vegetable of the wild</i> 15. <i>Bakery</i> 16. <i>Cakes, cookies and pastries</i> 17. <i>Eggs</i> 18. <i>Cereals</i> 19. <i>Alcoholic drinks (as food ingredients)</i> |  | <p>Data sheet available in Appendix 3</p> |
|--|---|---|

In Appendix 3, a provisional mapping for 9 of these categories is submitted in an effort to provide insights into the history, culture and uses of these products. The mapping is carried out on an extensive list of fresh and processed food but it is certainly not possible to provide an exhaustive mapping of all products and recipes available that can be termed as relevant to the Cyprus traditional gastronomy. Hoteliers should therefore be urged to provide, in their application form, their product suggestions giving adequate justification of their link to Cyprus tradition and authenticity.

8.4 List of traditional products for preparing information material

Story telling is often seen as a necessity in travelers' behavior. The current research work has seen a consensus across all hoteliers and a significant proportion of positive responses among consumers, in providing additional information about the traditional products. At this preliminary stage, it is suggested that a series of informational brochures is produced that can be placed at the entrance of the breakfast room, on the breakfast table (based on the day's special) or be circulated and explained by the Cyprus breakfast Guide. The proposed list of brochure publications is provided below and samples of such work (prepared in the past by the Consultant) is attached in Appendix 9.

- Carob, the black gold of Cyprus
- Cyprus Herbs & Aromatics
- Chiomeri and other wine mature meats

- Authentic spoon sweets of Cyprus
- Authentic marmalades from Cyprus
- Commandaria Wine
- Viticulture of Cyprus and products from the grape juice
- Olive and the olive tree
- Cyprus honey
- Traditional bakeries and sweets of the Cypriot gastronomic heritage
- Cyprus Breakfast, an authentic experience (general)

8.5 Organising Body & Organisational structure

Once the Cyprus Breakfast guidelines are laid down as a framework that hoteliers must adhere to in order to be granted the logo, it becomes no less than a certification scheme. All legal rights of the Cyprus Breakfast logo and the framework associated with it would belong to the Destination Partnership jointly unless otherwise decided. The Certification scheme could be managed either by the owners of the legal rights jointly or assigned to one of the two local organisations (CTO/ CSTI). The Cyprus Breakfast can be implemented by the establishment of an organisational structure for which the various roles are analysed below:

Executive committee: The committee responsible for the organisation, management and overall control of the Cyprus Breakfast concept, most likely composed of personnel by the members of the Destination Partnership. The executive committee must initially, (a) draft the rules, regulations and the framework guiding the Cyprus Breakfast concept, (b) issue the terms of reference of the Evaluation Committee and (c) assign in writing the job responsibilities of the key positions proposed below.

Evaluation committee: The evaluation committee should also be comprised of personnel from the Destination Partnership (could be comprised of the same people as the Executive Committee) and shall be responsible for the final decision in granting or not the Cyprus Breakfast logo to the Applicants. The Evaluation committee is granted the specific role of evaluating applications by hoteliers, granting the logo and imposing penalties. No other powers regarding the management, promotion, funding and operation of the Cyprus Breakfast Brand shall be given. Terms of reference should be prepared for guiding the committee's work.

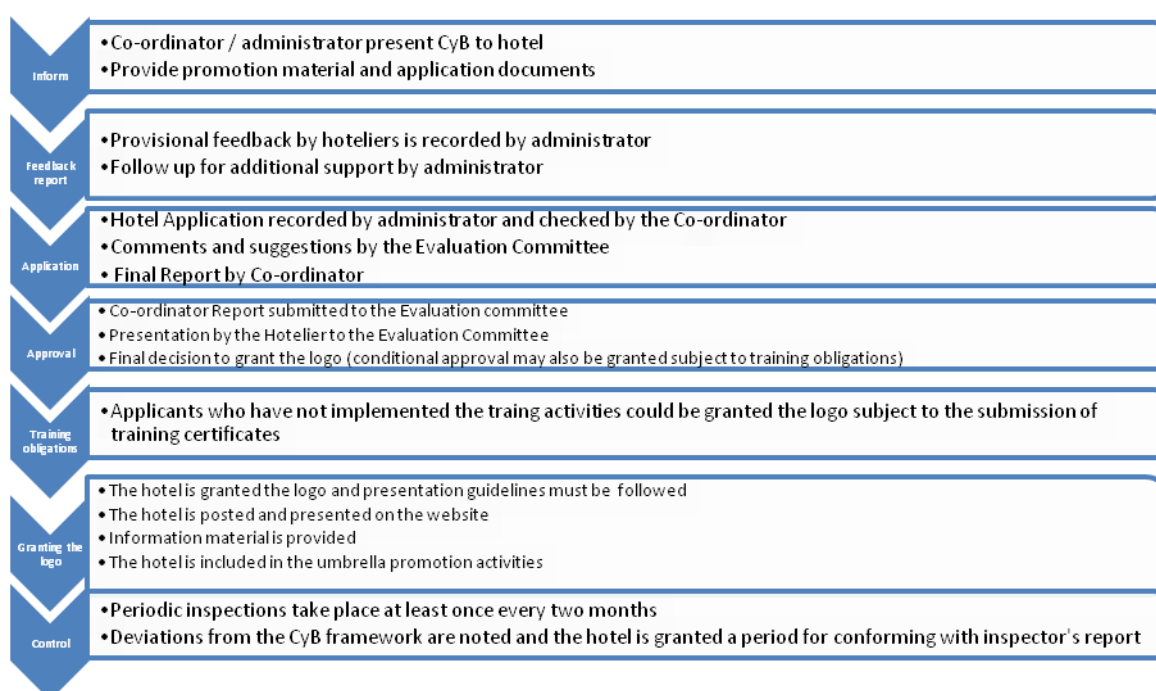
Co-ordinator: A person in charge of the organisation and management of the Cyprus Breakfast concept, answerable to the CDP executive committee. The person will have full responsibilities in running the pilot action, organising the documentation work, ensuring the development of the website, informing hoteliers, training the inspection officers and bringing together all other parties in the scheme. In order to save on budget, this person can either be an employee of the CDP members or an external expert that will be sub-contracted on a part time basis.

Cyprus Breakfast administrator: A full time staff working for the Cyprus Breakfast concept and running all day to day activities, supporting the co-ordinator. This person can be an existing employee of the CDP members or sub-contracted, using the current support schemes for young unemployed university graduates.

Inspection officers: Periodic checks on the hotel that have been granted the logo must be made by a competent body of inspectors or by assigning the task to external personnel. It is suggested that at least for the second phase which involves the implementation of the scheme on a pilot scale, inspectors who are currently staff of the CTO could undertake this task without the need of extra resources. Otherwise, for cost saving purposes, the duty of inspection could fall within the responsibilities of the Co-ordinator and the administrator.

Experts Committee: An external consultancy team comprising of, (a) an agrofood expert or food researcher, (b) an expert in hospitality, (c) an expert in interior designing / food stylist, (d) a nutritionist. This team shall be used for scientifically evaluating the applications of hotels and provide the Evaluation committee with necessary reports to support their work.

8.6 Flow chart for granting the Cyprus Breakfast logo



8.7 Planning for the implementation of the second (pilot execution) phase

Given the terms of reference, we define the project area for Phase II (Pilot implementation) as being confined to the Pafos – Polis regions and we suggest the period of implementation to run for 15 months, from February 2014 till April 2015. The implementation time plan is presented in the table below, while the suggested execution plan and the associated cost is provided on pages 54 and 55, giving two possible scenarios which are in turn based on low and high budget options. In the course of the final discussions, this table could provide a menu of low and high cost options which could be combined in order to reach the final implementation plan and the associated budget requirement. The two extreme budget scenarios suggest a minimum of €19.800 and a maximum of €105.000 without including the budget allocation to marketing and promotion.

Year	2014	2015
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Month	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
Preparatory (organisational) stage															
Cyprus Breakfast concept launching															
Pilot implementation period															
Ex post evaluation															
Transitional period prior to the full scale implementation															

8.8 A closing note

Experience shows that concepts that are destined to play the role of an umbrella brand, can only succeed if they are supported by adequate promotion funds and a well designed marketing plan. Potential members to the Cyprus Breakfast scheme would quickly see the value added of joining the scheme if this is promoted in an efficient manner with a significant promotional fund backing. On the contrary, lack of promotion funds could lead to a slow start for the concept, increasing the risk of failure if hotels cannot see or realise a quick impact on their membership to the new scheme.

It is therefore suggested that the potential for success is highly dependent on the funds available for promoting the Cyprus breakfast brand both in the international market and at the hotel premises. The promotion funds could be (a) available at the CDP for direct branding activities, (b) supplementary to the hotels for promoting the Cyprus Breakfast buffet eg special publications in food/ travel magazines with explicit reference to particular hotels, (c) indirect, via the CTO general promotion budget as an additional branding objective.

This report cannot provide specific suggestions on branding and marketing proposals as this depends on future decisions such as the budget availability, the organisational structure of the scheme and the willingness of the CTO to appreciate the concept's role as a key differentiating issue and as a communication channel for supporting the development of food tourism in Cyprus.