

Hellenic Republic

# THE STUDY OF TOURISM PROMOTION

With Special Reference to the Measures  
to Increase Japanese Tourists to Greece

## FINAL REPORT MAIN VOLUME

July 1989

Japan International Cooperation Agency

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Hellenic Republic

# THE STUDY OF TOURISM PROMOTION

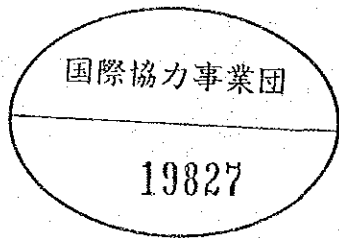
: with Special Reference to the Measures  
to Increase Japanese Tourists to Greece

## FINAL REPORT

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## PREFACE

In response to a request from the Government of Hellenic Republic, the Japanese Government decided to conduct a Study of Tourism Promotion and entrusted the study to Japan International Cooperation Agency (JICA).

JICA sent to Greece a survey team headed by Mr. Osamu Ohtsu, ALMEC Corporation, composed of members from ALMEC Corporation, Pacific Consultants International and the International Tourism Development Institute of Japan from September, 1988 to May, 1989.

The team held discussions with concerned officials of the Government of Greece, and conducted field surveys. After the team returned to Japan, further studies were made and the present report was prepared.

I hope that this report will contribute to the promotion of the project and to the enhancement of friendly relations between our two countries.

I wish to express my sincerest appreciation to the officials concerned of the Government of Hellenic Republic for their close cooperation extended to the team.

July, 1989



---

Kensuke Yanagiya

President

Japan International Cooperation Agency





July, 1989

His Excellency Mr. Kensuke Yanagiya  
President  
Japan International Cooperation Agency  
Tokyo, Japan

Letter of Transmittal

Dear Sir,

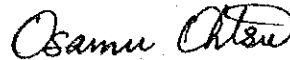
We are pleased to formally submit herewith the final report on "The Study of Tourism Promotion: with Special Reference to the Measures to Increase Japanese Tourists to Greece".

This report embodies the results of the Study which was carried out from September 1988 to July 1989 by the Japanese Study Team commissioned by the Japan International Cooperation Agency, following the request of the Government of Greece.

The Study Team, headed by Mr. Osamu Ohtsu, conducted a series of surveys on various relevant agencies throughout the country, analyzed data and prepared a tourism promotion plan for the year 1992. We hope that this Study would be of valuable assistance to the Government of Greece for the future promotion of Greek tourism.

We wish to express our appreciation and sincere gratitude to the officials of your Agency, Advisory Committee, the Embassy of Japan in Greece as well as to the officials of the agencies concerned in the Government of Greece, particularly the Greek National Tourism Organization, for the assistance and cooperation extended to the Study Team.

Very truly yours,

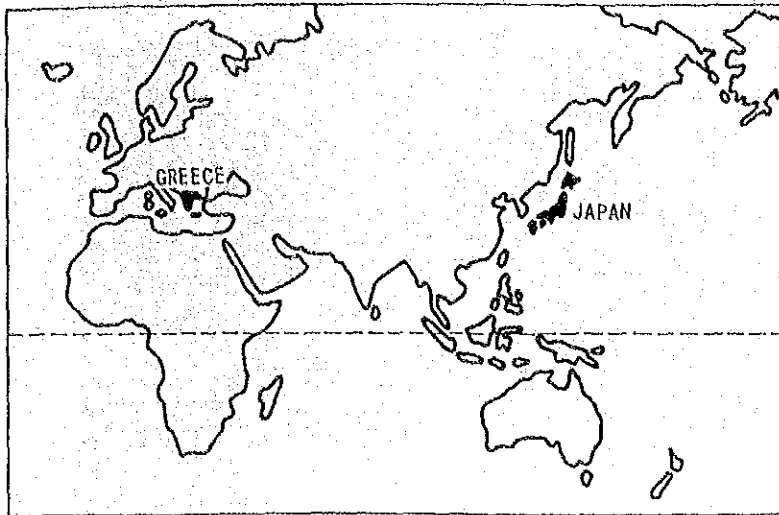


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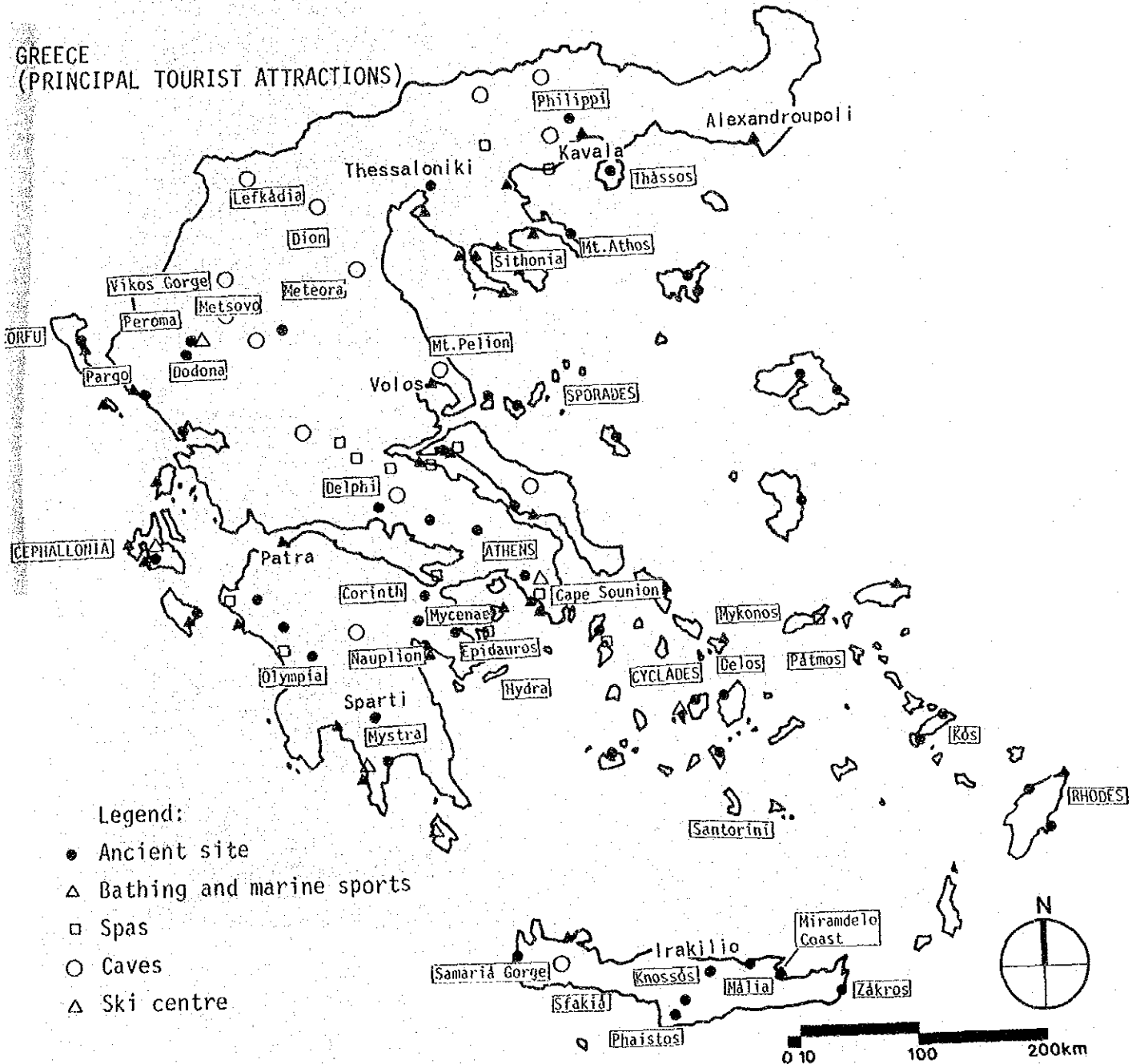
Osamu OHTSU  
Team Leader  
The Study of Tourism Promotion



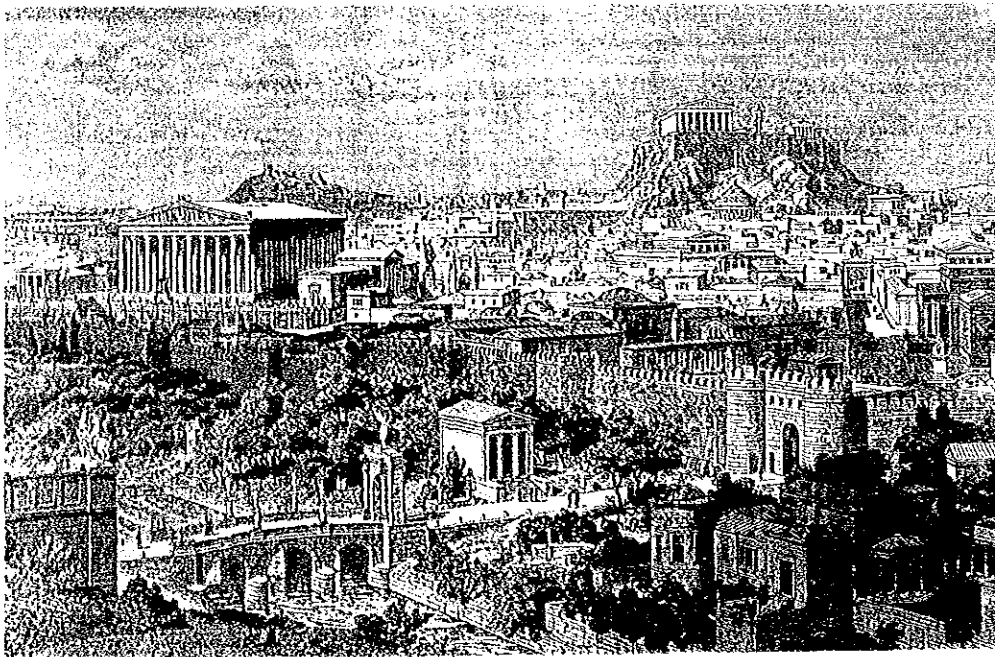
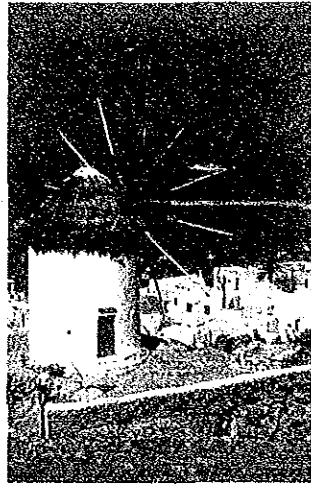
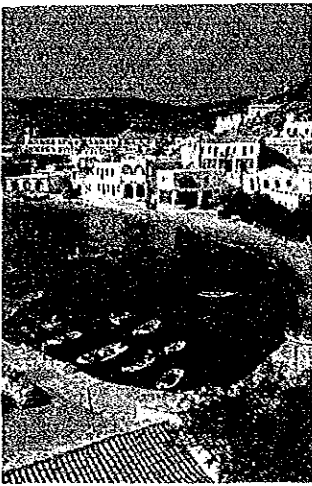
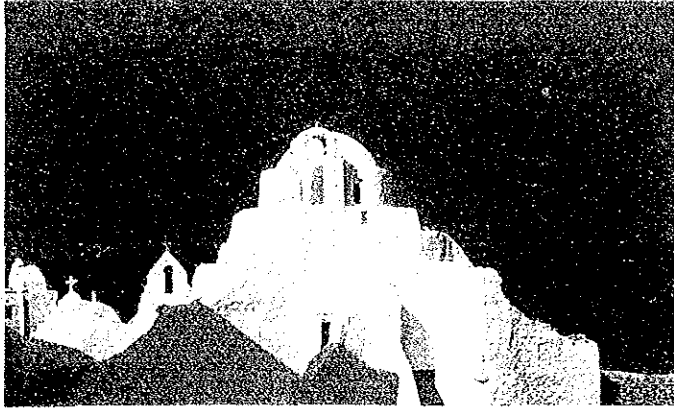
# STUDY AREA MAP



## GREECE (PRINCIPAL TOURIST ATTRACTIONS)







*A view of Athens from the east in Hadrian's time (restoration)*



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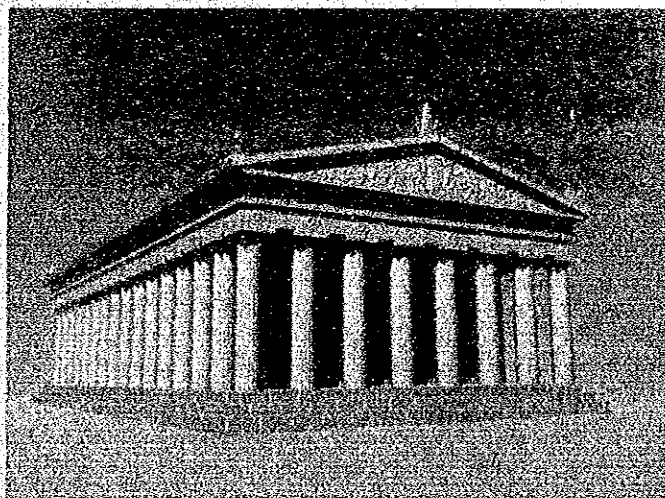


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## CHAPTER 1 INTRODUCTION





## CHAPTER 1 INTRODUCTION

### 1.1 Study Background and Objectives

#### 1.1.1 Background

Greece, a world famous advanced country in the field of international tourism, with her rich archaeological sites, marine scenic beauties, mountains and picturesque towns/streets, etc., is receiving a significant number of foreign tourists from all over the world. The number of tourists has been steadily increasing these past ten years, from 5.1 million in 1978 to 8.2 million in 1988.

The tourism sector plays an important role in the Greek economy, i.e., the foreign currency income from tourism (including direct tourist receipts, credit card purchases, cruises, etc.) covers over half the amount of the trade deficit or 7.8 percent of the Gross National Product (GNP).

But in order to overcome difficulties, which the Greek economy faces, it is necessary to carry out further tourism promotion.

In this context, based on the request of the Government of Greece, the Government of Japan agreed to conduct the Study on Tourism Promotion through the Japan International Cooperation Agency (JICA). The scope of work for the Study of Tourism Promotion; with special reference to the measures to increase Japanese tourists to Greece (hereinafter referred to as the Study), was signed between the Greek National Tourist Organization (GNTO) and JICA in March 1988.

Hence, JICA organized a Study Team and an Advisory Committee for the implementation of the Study, and the Study was commenced in the middle of September 1988.

#### 1.1.2 Objectives

The objectives of the Study are to analyze existing constraints and problems, and to make recommendations for possible measures to increase Japanese tourists to Greece.

Special emphasis is placed on the aspects of administration and institution as well as the aspect of infrastructure of the tourism sector in Greece.

### 1.2 Study Framework

#### 1.2.1 Outline of the Study Contents

##### 1) Study Area

The Study covers the areas specified in Greece as the destinations, and the areas in Japan as the origin of tourists.

##### 2) Target Year

The year 1992 is defined as the target year for the forecast of future demand and recommendations.

### 3) Study Items

In order to achieve the objectives mentioned above, the Study covers the following items:

- (1) Analysis of Existing Conditions
  - (a) Review of previous studies with direct relevance to Japanese tourists.
  - (b) Investigation of present conditions (policy, plans, programmes, projects, resources, infrastructure, and institutions).
  - (c) Identification of constraints and problems.
- (2) Market Research and Demand Forecast of the Japanese Market
  - (a) Evaluation of resources and infrastructure.
  - (b) Market research and analysis.
  - (c) Assessment of internal/external factors affecting future demand.
  - (d) Forecast of tourism demand.
- (3) Formulation of a Plan for Tourism Promotion to Increase Japanese Tourists
  - (a) Establishment of goals and objectives.
  - (b) Identification of criteria for the attraction of Japanese tourists.
  - (c) Establishment of promotion strategy and tactics.
  - (d) Formulation of implementation programmes.
- (4) Recommendations

#### 1.2.2 Study Schedule

The Study was commenced in the middle of September 1988 and completed in July 1989. The overall study schedule is presented in Figure 1.2.1.

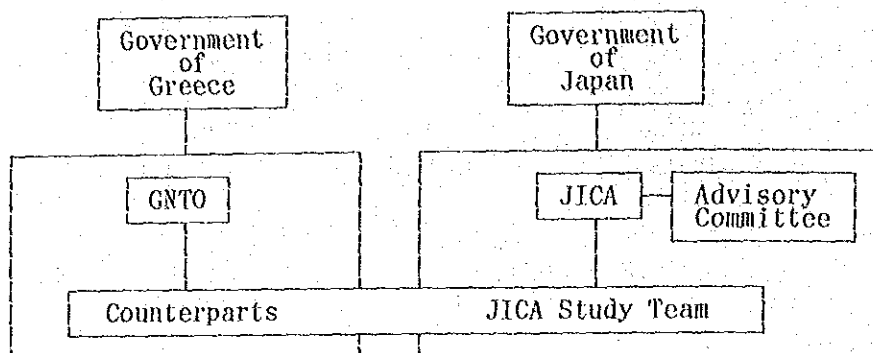


### 1.3 Study Organization

The Study was carried out by the JICA Study Team in close cooperation with GNTO and other Greek authorities concerned.

The organizational framework is illustrated in Figure 1.3.1.

Figure 1.3.1  
Organizational Framework



#### 1) JICA Study Team

The members of the Study Team are listed in Table 1.3.1.

Table 1.3.1  
List of Study Team Members

Assignment	Name
1. Team Leader	Mr. Osamu OHTSU
2. Tourism Promotion	Mr. Takashi HAYASHI
3. Tourism Facilities	Dr. Hirohisa NAKADA
4. Publicity Planning	Mr. Takashi HARADA
5. Transport Planning	Mr. Hiroshi TANAKA
6. Market Study	Mr. Shigeo IMAI
7. Demand Forecast	Mr. Haruhiko IMAI
8. Financial Analysis	Ms. Chizuko IHARA
9. Socioeconomic Analysis	Mr. Shizuo IWATA



2) JICA Advisory Committee

JICA requested the following members to set up the Advisory Committee, which gives advices to the Study Team.

Table 1.3.2  
List of Advisory Committee Members

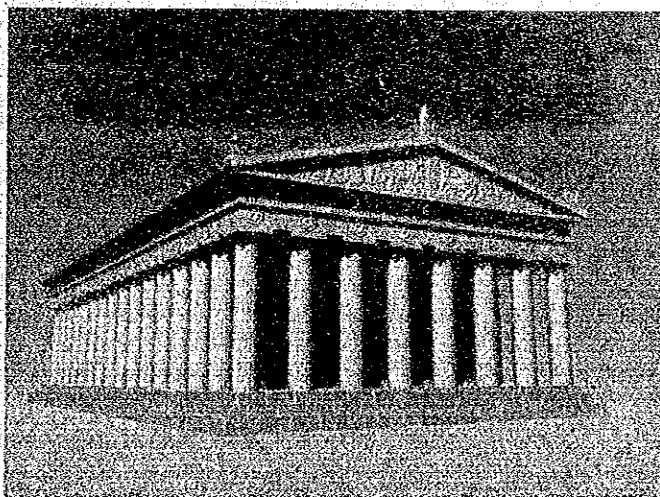
Assignment	Name	Office of Affiliation
Chairman	Mr. Kousuke SHIBATA	Ministry of Transport
Member (Tourism Promotion)	Mr. Kiichi KUROSU	Japan National Tourist Organization
Member (Tourism Policy)	Mr. Kazuo MARUYAMA	Ministry of Transport
Member (Demand Forecast)	Mr. Wataru OBARA	Ministry of Transport

3) Counterpart Officials

Greek National Tourism Organization (GNTO) acted as the counterpart agency to the JICA Study Team.



## CHAPTER 2 THE COUNTRY'S PROFILE





## CHAPTER 2 COUNTRY'S PROFILE

### 2.1 Geography

Greece is located at the southern most of Europe. The country stretches from the Balkan Peninsula to the Mediterranean Sea. The country adjoins with Albania, Bulgaria and Yugoslavia to the north, with Turkey to the east, with Italy across the Ionian Sea and with Africa across the Mediterranean Sea.

With this geographical background, historically, Greece was a centre for interchange of eastern and western cultures, and was the cradle of European culture and civilization.

- o The attractiveness of Greek tourism is mainly attributable to this geographical and historical position.

The country covers 132 thousand square kilometers and extends approximately 1,300 kilometers from north to south and 1,000 kilometers from west to east. The mainland is generally mountainous and Pindos Range runs through from north to south. Highest mountains are more than 2,000 meters high and they are snow-capped until late spring. Flat land is fragmented and limited to some major urban areas such as Athens, Thessaloniki, Larissa, etc. 427 islands with different sizes, of which 134 are inhabited, are scattered over the Aegean Sea and the Ionian Sea. The country's some 15,000 kilometers long coastline is the longest in Europe.

- o North-South extension, various ups and downs and long coastline of the national land provide many opportunities for tourism activities.

### 2.2 Climate

The climate of Greece is varied by season and region, though it is basically of Mediterranean, "mild throughout the year" (see Table 2.2.1).

During summer from June to September, the country is blessed with blue sky and bright sunshine. The temperature is very high and sometimes exceeds 40 C in July and August (the average temperatures in Athens in July and August are 27.3 C and 26.5 C, respectively). Humidity is low in summer.

During winter, the weather in southern areas is mild with an average temperature of 12 to 13 C in December and January, while that in central and northern areas is relatively cold with snowfalls on the high mountains. The whole country is rather rainy in this season.

The weather in spring and autumn is mild and average temperature is 15 to 20 C.

- o At present, Greek tourism season is concentrated in the summer for full of blue sky and bright sunshine, but late spring and early autumn can also allow similar tourist activities. For a sightseeing purpose, whole spring and autumn are comfortable for tourists.

Table 2.2.1  
Climate of Greece<sup>1/</sup>

1) Air Temperature in Degrees/Celsius

i) Average (1971 - 1980)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Athens	9.3	10.1	12.2	15.3	20.7	25.2	27.3	26.5	23.2	18.3	14.4	11.0	17.8
Herakleion	12.0	12.4	13.7	16.4	20.3	24.1	26.0	25.4	23.3	20.4	16.4	13.4	18.6
Thessaloniki	5.0	7.0	9.6	13.5	19.4	24.2	26.4	25.2	21.0	15.4	10.4	6.2	15.3
Kalamata	9.5	10.3	12.1	14.3	19.5	24.0	25.8	25.5	22.5	17.8	13.7	10.8	17.2
Corfu	9.8	10.6	12.1	14.6	19.5	23.8	25.7	25.5	22.1	17.8	13.6	10.8	17.2
Rhodes	11.3	12.1	13.6	16.3	20.6	24.8	26.8	26.5	24.2	20.3	16.1	12.7	18.6
Tokyo <sup>2/</sup>	4.7	5.4	6.4	13.9	18.4	21.5	25.2	26.7	22.9	17.3	12.3	7.4	15.3
Sendai <sup>2/</sup>	0.9	1.3	4.2	10.0	14.9	18.4	22.2	23.9	20.0	14.3	8.7	3.7	11.9

ii) Absolute Maximum (1985)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Athens	19.8	19.5	19.2	29.8	32.1	34.7	39.0	40.0	34.3	30.7	24.8	21.4	40.0
Herakleion	22.4	23.5	22.4	34.2	29.5	33.8	33.4	35.2	29.5	24.8	28.6	21.0	35.2
Thessaloniki	17.4	18.0	17.8	31.2	31.6	34.0	33.4	37.8	34.0	28.0	19.4	19.2	38.4
Kalamata	18.6	19.2	23.0	29.8	30.4	33.6	37.8	39.4	33.4	28.8	23.6	20.4	39.4
Corfu	18.0	17.2	20.6	25.6	33.8	31.0	37.0	37.2	32.8	30.0	22.0	20.2	37.2
Rhodes	18.6	18.2	18.8	24.6	30.0	31.2	34.0	34.6	32.6	29.6	24.8	20.8	34.6
Tokyo <sup>2/</sup>	9.5	10.0	13.0	18.4	22.7	25.3	28.9	30.8	26.7	21.2	16.6	12.1	19.6
Sendai <sup>2/</sup>	5.2	5.8	9.1	15.2	19.8	22.4	25.9	28.0	24.1	19.0	13.7	8.1	16.4

iii) Absolute Minimum (1985)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Athens	2.1	-0.2	4.3	6.0	10.1	16.4	16.9	18.3	14.4	6.3	7.6	3.4	-0.2
Herakleion	5.5	2.5	6.4	9.2	10.4	15.5	18.5	19.0	15.2	9.6	9.8	6.0	21.5
Thessaloniki	-5.2	-8.4	2.0	3.0	4.4	15.0	14.2	16.2	10.0	-3.2	2.0	-1.0	-8.4
Kalamata	0.6	-3.2	3.0	5.4	8.0	11.8	14.0	14.6	11.4	4.8	6.5	0.3	-3.2
Corfu	-1.6	-2.0	3.8	5.0	5.4	12.0	14.8	14.8	13.4	7.2	6.0	-0.6	-2.0
Rhodes	8.0	3.0	4.2	11.4	14.0	18.4	20.6	22.4	18.8	12.4	13.8	7.8	3.0
Tokyo <sup>2/</sup>	0.5	1.2	4.2	9.8	14.5	18.4	22.2	23.6	19.9	13.9	8.4	3.3	11.7
Sendai <sup>2/</sup>	-2.7	-2.5	-0.1	5.2	10.3	15.2	19.3	20.8	16.6	10.3	4.4	-0.1	8.1

2) Precipitation

i) Precipitation in mm (average 1971 - 1980)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Athens	44	57	42	26	17	8	5	8	16	17	53	66	360
Herakleion	94	66	52	31	12	3	1	0	23	64	53	76	476
Thessaloniki	42	41	42	46	48	26	30	29	36	62	43	37	482
Kalamata	112	118	64	77	23	6	5	9	28	120	148	123	834
Corfu	146	150	114	75	42	7	19	23	79	174	168	149	1147
Rhodes	149	139	63	31	20	5	0	0	3	66	64	125	665
Tokyo <sup>2/</sup>	54	63	102	128	148	181	125	137	193	181	93	56	1460
Sendai <sup>2/</sup>	46	48	72	82	109	141	160	153	175	118	69	49	1219

ii) Days of Precipitation (average 1971 - 1980)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Athens	13	14	10	10	7	4	3	2	5	9	10	12	101
Herakleion	17	15	11	9	4	1	0	1	3	9	10	14	94
Thessaloniki	13	12	13	12	11	7	6	6	8	10	10	10	118
Kalamata	16	14	11	13	6	4	1	3	5	12	13	14	112
Corfu	17	15	13	14	8	4	3	4	8	13	14	14	127
Rhodes	15	13	9	8	4	2	0	0	2	7	8	12	80
Tokyo <sup>2/</sup>	5	6	9	10	10	12	10	9	11	10	7	5	104
Sendai <sup>2/</sup>	6	6	7	8	9	12	13	12	12	9	6	6	105

<sup>1/</sup> Tokyo and Sendai are shown for reference. Tokyo at 35° 40' north, Sendai at 38° 16' north (Athens at 38° 00').

<sup>2/</sup> Average of absolute maximum/minimum by each month.

Sources: Statistical Yearbook of Greece, 1986  
Rika Nenryo (Science Yearbook of Japan), 1988

- o As such examples indicate, Greek climate gives a distinctive feature to each season, which allow tourists to enjoy its unique attractiveness. It is, therefore, quite important to select visiting seasons in accordance with respective travel purposes.

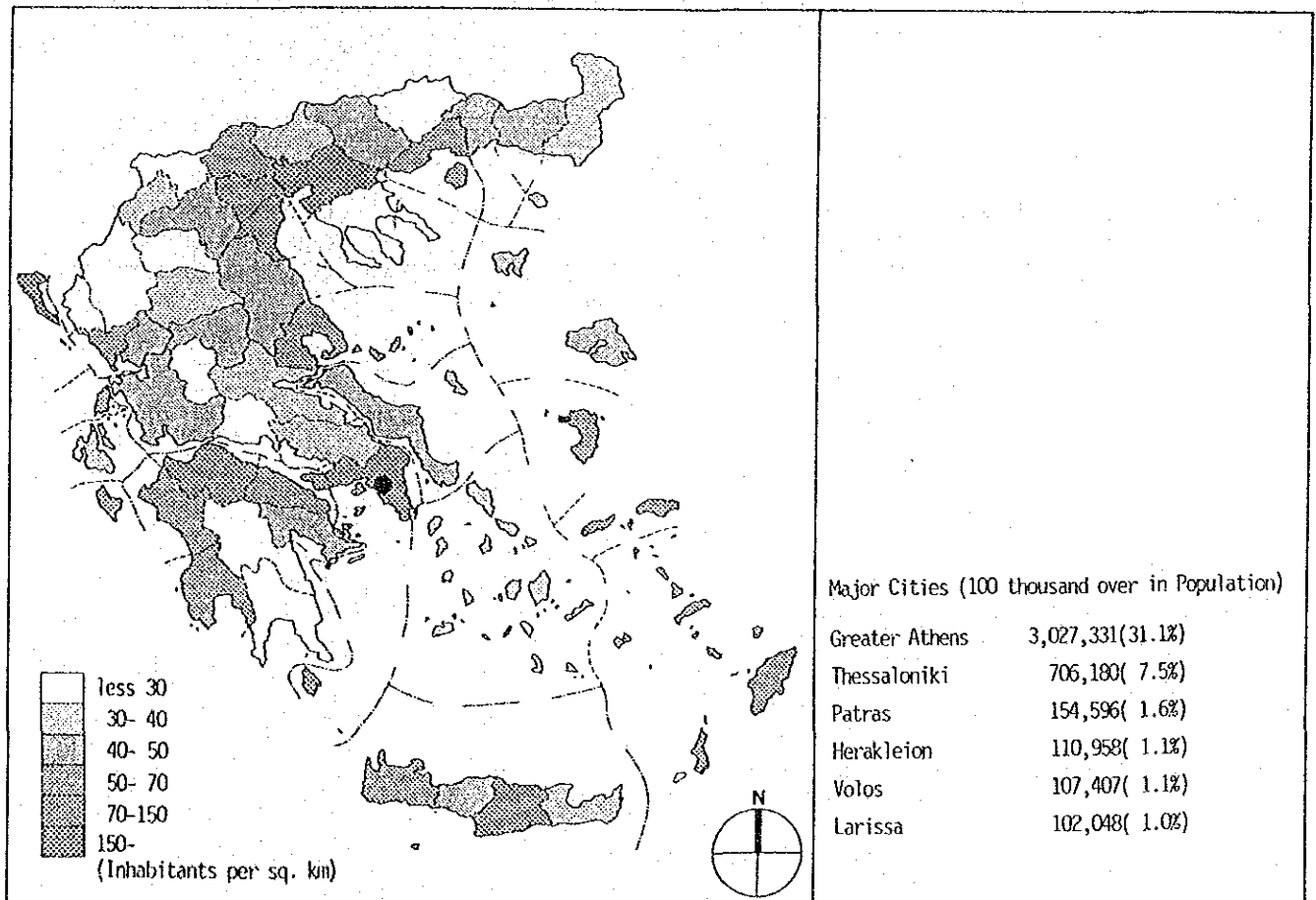
### 2.3 Population

Greece has a population of about 10 million with an average growth rate of 0.6% per annum, which is quite similar to those of other member countries of the Organization for Economic Cooperation and Development (OECD).

Greater Athens area is the largest populated area in Greece, and has 31% of the total population in 1981. Thessaloniki is the second largest with about 710 thousand population in 1981. Urban concentration is limited to Athens and Thessaloniki. Other cities with population of 100 thousand or more are Patras, Herakleion, Volos and Larissa (see Figure 2.3.1).

Average population by community, except Greater Athens and Thessaloniki, is about 13,000 in 1981. Thereby, the regional development in local area is one of the keen issues in Greece.

Figure 2.3.1  
Population Density by Administrative Department  
'Nomos', 1981



The ratios of foreign tourists to local residents in several regions/areas are more than as high as 2% as shown in Table 2.3.1.

Table 2.3.1  
Number of Tourists/Tourist nights  
per Inhabitants in Some Areas

Region/ Area	Number of Tourists per 1,000 Inhabitants a Year		Number of Tourist - Nights per 1,000 Inhabitants a Year	
	Greek	Foreigner	Greek	Foreigner
Dodecanese	877	5,300	10.5	142.2
Corfu	961	3,730	9.0	90.6
Crete	418	1,923	3.2	37.3
Chalkidiki	968	1,176	11.0	29.9
Argolis	1,212	3,522	7.9	28.5
Cyclades	861	1,731	7.1	21.0
Samos	353	954	4.0	20.6

Source: Tourist Statistics, Years 1984 and 1985

- o Population size of Greece is not so large. But each community from Greater Athens to some islands with a small population has its own character with its historical background. Tourism promotion in scarcely populated area is given high priority from the viewpoint of regional development policy.

There are large Greek expatriate communities in the world such as in Canada, Australia, South Africa, West Germany, etc.

- o Typical Greek temperament to strangers is said to be hospitable, as represented by the Greek word 'Philoxenia', due to long history of exchange with different culture and abundant emigration experiences.



## 2.4 Economy

### Sectoral Composition

The sectoral composition of Greek economy, as indicated in Table 2.4.1, shows relatively high percentage (16.4%) of the primary sector in the Gross Domestic Product (GDP) in 1987. Major agricultural products are wheat, tobacco, cotton, fruits, vegetables, etc., which make Greece almost self-sufficient in food.

The share of the secondary sector in GDP was almost 30% during the 1970s and 80s. The manufacturing sector is largely composed of light industries such as food, drinks, tobacco, textiles and shoes.

The first stage of industrialization occurred in 1950s in the sectors of construction and light industries. Industrialization was accelerated after 1962 through a rapid increase of foreign investment in modern technology sectors. The chemical and petroleum industry developed with the import of oil from the Middle East countries at the beginning of the 1960s. The first oil crisis in 1973 as well as the second crisis in 1979, seriously affected the development course of the Greek economy. Development of the petroleum industry in the Middle East countries caused also unfavorable effect on the petroleum industry in Greece. Although Greek industry has been experiencing a positive growth with world economic growth since 1982, the development of heavy industry is not yet well-advanced.

The tertiary sector accounted for almost 50% of the country's GDP in 1961 and has continued to grow slightly.

Table 2.4.1  
Economic Indicators of Greece

	1961	1971	1981	1986	1987
<b>1. GNP</b>					
1) Nominal GNP (Drs billion)	121	338	2,110	5,496	6,361
2) Real GNP (Drs billion at 1970 Price)	162	328	484	505	504
3) Real Growth Rate (%/year)		7.3	4.0	0.9	-0.2
4) Per Capita GNP (US\$)	n.a.	1,276	3,911	3,940	4,677
<b>2. Sectoral Composition of GDP (%)</b>					
1) Primary	22.5	18.2	17.7	16.9	16.4
2) Secondary	24.5	31.9	30.7	29.4	28.7
3) Tertiary	49.7	49.9	51.6	53.7	54.9
<b>3. Balance of Payments (US\$ million)</b>					
1) Import		1,927	11,468	10,198	12,556
2) Export		625	4,771	4,513	5,614
3) Trade Balance		-1,302	-6,697	-5,686	-6,942
4) Invisible Earnings		1,292	6,482	6,512	8,490
5) Invisible Payments		317	2,206	2,598	2,843
6) Balance of Invisibles		975	4,276	3,914	5,647
7) Balance		-327	-2,421	-1,772	-1,295

Sources: The Greek Economy in Figures, 1987 (data from 1961 to 1986)  
Bank of Greece (1987 data)

## International Trade

Major items exported from Greece are fruits, nuts, tobacco, petroleum products, textile yarn, garment, wine, etc. On the other hand, the major items imported are manufactured goods, cars, machineries, transport equipments and specific food items such as meat, live animals, cereals, etc. (see Table 2.4.2).

Table 2.4.2  
International Trade of Greece, 1987

### Major Export

Item	US\$ million	%
1. Food and Beverages	1,342	23.9
Olives & Olive Oil	248	4.4
Fruits & Vegetables	483	8.6
Others	611	10.9
2. Tobacco	228	4.1
3. Raw materials and Semi-finished Products	192	3.4
4. Minerals and Ores	209	3.7
5. Petroleum Products	545	9.7
6. Manufactures	2,879	51.3
Textiles	1,278	22.8
Metals & Metal Articles	269	4.8
Furs	173	3.1
Aluminum & Alumina	189	3.0
Chemicals & Pharmaceuticals	152	2.7
Others	838	14.9
7. Unallocated	219	3.9
<b>Total</b>	<b>5,614</b>	<b>100.0</b>

### Major Import

Item	US\$ million	%
1. Food	2,176	17.3
Meat and Live Animals	774	6.2
Daily Products	335	2.8
Other	1,047	8.3
2. Raw Materials	1,733	13.8
Chemicals	591	4.7
Iron and Steel	494	3.9
Others	648	5.2
3. Fuel	2,360	18.8
Crude Oil	1,660	13.2
Others	700	5.6
4. Capital Goods	2,401	19.1
Machinery	1,867	14.9
Transport Equipment	346	2.8
Electrical Equipment	188	1.5
5. Manufactured Consumer Goods	3,847	30.6
Textiles	583	4.6
Plastic & Plastic Articles	359	2.9
Motor Vehicle Articles & Passenger Vehicles	559	4.5
Scientific & Medical Instrument	342	2.7
Others	2,004	18.0
6. Unallocated	39	0.3
<b>Total</b>	<b>12,556</b>	<b>100.0</b>

Source: Monthly Statistical Bulletin, Bank of Greece

Greece has large trade balance deficit. Chronic trade imbalance is mainly due to heavy reliance on the import of fuel and various heavy industrial goods.

Greece's major export trading partners are West Germany, Italy, USA and U.K., while major import trading partners are West Germany, Italy and OPEC countries, as shown in Table 2.4.3.

Table 2.4.3  
Greek Trade by Country, 1987

Country	Export			Import		
	US\$ million	%	Ranking	US\$ million	%	Ranking
OECD countries	4,338	77.3		10,041	80.0	
EEC	3,192	56.9		7,580	60.4	
W. Germany	1,180	21.0	1	2,582	20.6	1
France	361	6.4	5	1,057	8.4	3
Italy	859	15.3	2	1,452	11.6	2
Netherlands	117	2.1	8	325	6.6	5
Belgium-Luxembourg	126	2.2	7	335	2.7	
U.K.	435	7.7	4	622	5.0	6
Others	114	2.0		707	5.6	
Other OECD	1,146	20.4		2,461	19.6	
Switzerland	158	2.8	6	372	3.0	8
USA	668	11.9	3	1,037	8.3	4
Japan	64	1.1	10	346	2.8	
Others	256	4.6		706	5.6	
East Europe	204	3.6		620	4.9	
USSR	60	1.1		369	2.9	9
Others	144	2.6		251	2.0	
OPEC Countries	205	3.7		1,351	10.8	
Iraq	22	0.4		413	3.3	7
Saudi Arabia	94	1.7	9	364	2.9	10
Others	89	1.6		574	4.6	
Other Countries	867	15.4		544	4.3	
TOTAL	5,614	100.0		12,556	100.0	

Source : Monthly Statistical Bulletin, July 1988 Bank of Greece.  
July 1988

#### Balance of Invisibles

Invisible earnings, mainly consisting of receipts from tourism, shipping and emigrants remittances, totalled US\$ 8,490 million and invisible surplus increased to US\$ 5,647 million in 1987, which covered 81% of the trade deficit.

Although per capita GNP in Greece was US\$ 4,677 in 1987 and still remains in lower level among EEC countries, its agricultural sector makes Greece a self-sufficient country in food supply and the living standard of the Greek people is not badly off. Neither heavy industry nor high technology industry in Greece have yet been developed well. Most of the trade deficit has been substantially recovered by invisible earnings.

- o Both structural adjustment and continuous strengthening of invisible earnings (including tourism) are important for the Greek economy for years to come.

## 2.5 Employment

Total employment in 1986 is about 3.6 million, which had grown only at an annual rate of 0.4% from 3.5 million in 1981. The tertiary sector has the highest share of 43% of the total employment and the primary sector has 28.5% (see Table 2.5.1).

Table 2.5.1  
Employment by Sector

Sector	1981		1986	
	000	%	000	%
Agriculture, Livestock, Fishing	1,083	30.7	1,026	28.5
Mining and Quarrying	19	0.5	24	0.7
Manufacturing, Handicraft	681	19.3	718	19.9
Electricity, Gas, Steam, Water	30	0.8	36	1.0
Construction, Public Works	293	8.3	235	6.5
Commerce, Restaurants, Hotels	529	15.0	562	15.6
Transport, Warehousing, Communication	274	7.8	238	6.6
Banking Insurance, Real Estate	117	3.3	139	3.9
Other Services	504	14.3	623	17.3
<b>Total</b>	<b>3,530</b>	<b>100.0</b>	<b>3,601</b>	<b>100.0</b>

Source: The Greek Economy in Figures, 1987 Electron Press Publications

The unemployment rate has been slightly decreasing recently (7.4% in 1986). This rate, though still high, is lower than the average of EEC countries.

The unemployment rate varies by month. During the tourism peak season, between May and October, it is less than 5%, while it increases to more than 10% during the rest of the year.

Generally speaking, workers in Greece have well organized labour unions.

The number of labour disputes has been steadily decreasing as shown in Table 2.5.2.

- o The unemployment rate is high in general and thus, supply of manpower is not considered a serious problem in Greece. Labour dispute in Greece showed a fierce tendency in the past, however, it has been steadily decreasing recently.

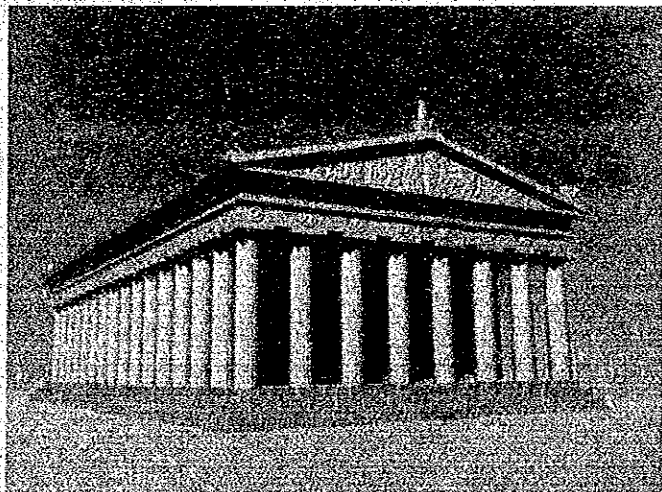
Table 2.5.2  
Labour Dispute by Country

Country/Year	No. of Incidents	No. of Participants (000)	No. of Participants/Incident	No. of Participants/Labour	Loss of Days (000)
Greece 1980	726	1,408	1,939	0.4	2,907
1985	453	786	1,735	0.2	1,094
1986	213	1,106	5,193	0.3	1,263
Spain 1986	914	858	939	0.06	2,280
France 1986	1,391	22	16	0.001	568
Italy 1986	1,469	3,607	2,455	0.15	5,643
U.K. 1986	1,074	720	670	0.03	1,920
Portugal 1986	476	199	418	0.04	275
Austria 1986	11	3	273	0.001	3

Source: International Statistics Digest, Agency of General Affairs Japan, 1988



## CHAPTER 3 OVERVIEW OF TOURISM IN GREECE







## CHAPTER 3 OVERVIEW OF TOURISM IN GREECE

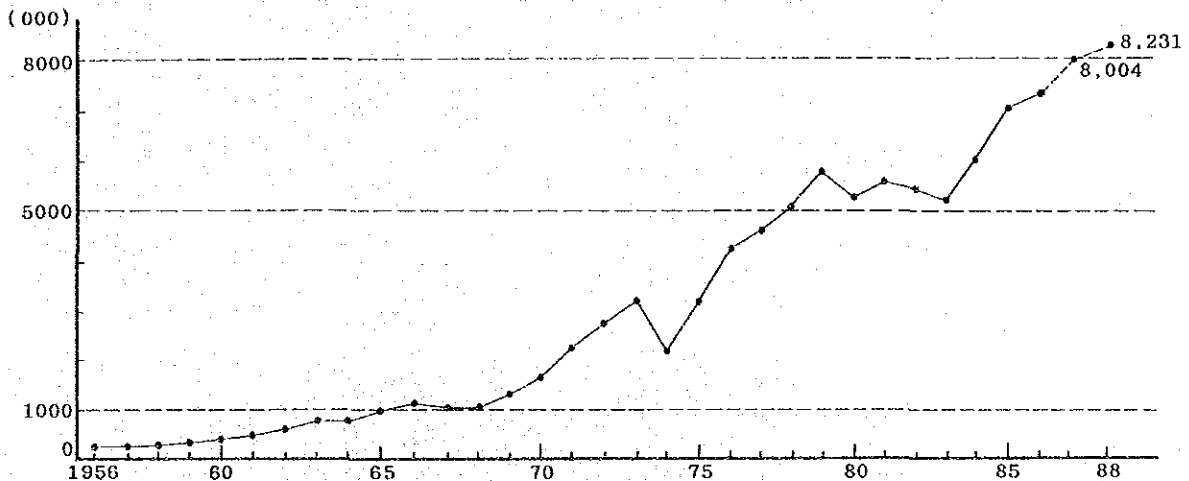
### 3.1 Demand Characteristics

#### 3.1.1 Historical Trend of Foreign Arrivals

The number of foreign arrivals to Greece has steadily increased since the 1960s as shown in Figure 3.1.1; 400 thousand in 1960, 1,610 thousand in 1970, 5,270 thousand in 1980, 7,040 thousand in 1985, 8,004 thousand in 1987 and 8,231 thousand in 1988.

In 1974, 1980, 1982 and 1983, the number of arrivals decreased from previous years, mainly due to the oil crisis and world wide recession during those periods (see Figure 3.1.1).

Figure 3.1.1  
Trend of Total Tourist Arrivals  
in Greece, 1956 - 1988



Source: GNT0

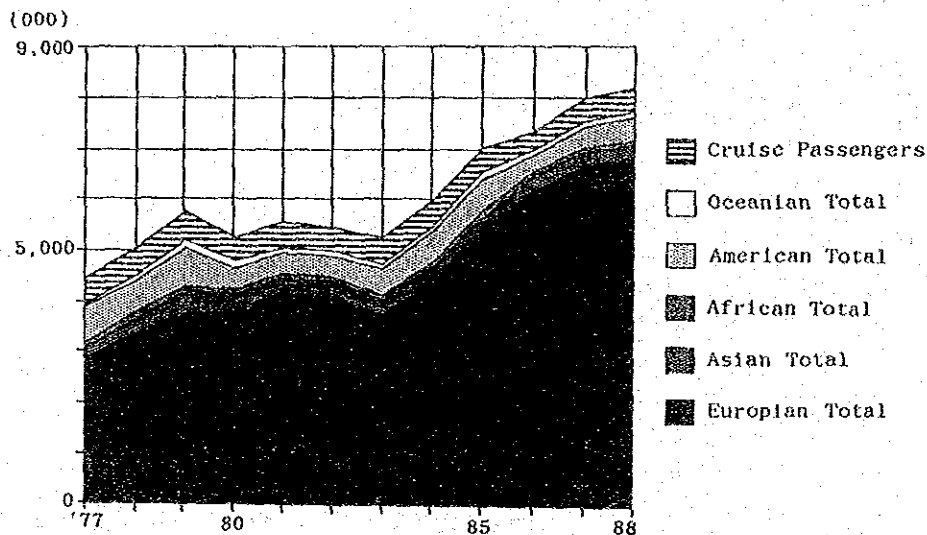
The number of foreign arrivals in Greece from 1965 to 1985 increased 7.2 times; while world trade (export and import), international tourists arrival and worldwide tourism receipts grew 11.7 times, 3.0 times and 9.3 times in the same period, respectively. Though it is not certain that there are some significant correlations between the number of tourist arrivals in Greece and the three factors mentioned above, it is believed that the increasing growth of world economy have positive effects on world tourism.

### 3.1.2 Trends by Nationality

Table 3.1.1 shows the arrivals of foreign tourists by nationality.

- o By Continent, as shown in Figure 3.1.2, the European countries occupy a dominant share (84% in 1986, increasing from 65% in 1977), followed by the American countries, whose share indicated a wide fluctuation; 15% in 1977 to 4% in 1986.
- o United Kingdom and West Germany are the two biggest tourist originating countries in that order, and recently this situation is stable. Most of other nationalities show wide fluctuations; as wide as  $\pm 30\%$  and over compared to previous years (see Table 3.1.2 and Figure 3.1.3). The following factors are noteworthy to see the fluctuations:
  - decrease in the arrivals of Yugoslavian and French in 1983: changes in control of international travel
  - decrease in the arrivals of the Americans, both in 1980 and 1986: the second oil crisis and the hijack incident

Figure 3.1.2  
Trend of Total Tourist Arrivals  
by Continent (1977-88)



Source: GNTQ

Table 3.1.1  
Tourist Arrivals by Country  
(1977 - 1988)

Country	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)	Arrivals (\$)
1 Austria	172,553	150,717	151,570	187,312	263	144,032	195,381	237,918	282,468	395	305,000	381
2 Cyprus	---	---	---	---	106,106	97,101	103,249	94,449	101,032	1,44	120,000	150
3 Denmark	90,802	128,095	126,320	170,684	2,48	148,100	148,626	124,037	160,792	2,28	210,000	2,62
4 United Kingdom	384,076	514,485	539,657	786,215	14,57	1,022,892	886,991	1,043,363	1,329,299	19,88	1,980,000	24,74
5 France	278,488	347,627	319,483	299,791	5,69	335,366	299,506	405,907	451,141	5,27	510,000	6,37
6 Germany	489,522	520,547	555,171	692,961	13,15	606,046	728,478	864,800	1,120,000	15,26	1,205,000	15,05
7 Italy	164,631	214,678	264,048	197,006	3,74	223,922	327,619	328,598	384,177	5,17	440,000	5,81
8 Spain	25,729	24,174	51,247	32,906	0,62	27,331	31,021	33,991	40,791	0,58	50,000	0,62
9 Sweden	252,600	254,793	222,416	235,592	4,47	267,834	189,921	194,356	223,958	3,18	239,000	2,99
10 Switzerland	115,325	126,743	142,334	154,666	2,93	149,497	173,830	156,995	205,662	2,92	172,000	2,15
11 Yugoslavia	490,639	514,529	572,777	477,393	9,06	537,553	55,375	265,209	350,735	4,99	420,000	5,25
12 Rest of Europe	457,217	575,957	791,106	666,031	12,64	861,436	598,721	659,503	858,205	12,19	1,006,000	12,48
EUROPE TOTAL	2,879,622	3,272,355	3,757,727	3,842,387	72,90	4,121,010	3,749,709	4,410,226	5,408,296	78,63	6,578,000	83,11
13 Japan	46,241	61,451	129,050	75,666	1,44	74,802	82,029	86,476	92,802	1,32	92,000	1,15
14 Israel	15,297	36,939	76,155	31,278	0,55	31,347	49,188	31,887	18,727	0,26	26,000	0,45
15 Turkey	42,551	49,761	98,197	47,590	0,90	42,625	43,427	42,770	48,784	0,69	54,000	0,70
16 Rest of Asia	106,164	134,538	137,508	148,237	2,77	139,430	150,771	137,606	124,892	1,92	102,000	1,27
ASIA TOTAL	210,253	281,789	440,911	300,761	5,71	308,194	325,415	299,739	294,705	4,19	285,000	3,41
17 Egypt-Sudan	46,036	50,610	42,048	50,067	0,95	31,219	37,725	43,415	50,991	0,72	50,000	0,62
18 South Africa	26,304	32,001	24,079	24,712	0,47	25,661	25,690	26,130	23,467	0,33	17,328	0,24
19 Rest of Africa	36,796	43,707	43,707	31,068	0,60	31,068	32,804	31,729	35,661	0,56	32,823	0,45
AFRICA TOTAL	109,136	125,518	92,202	106,667	2,02	87,966	96,219	101,274	114,139	1,62	81,000	1,01
20 USA	598,470	513,181	601,456	288,647	5,48	333,080	406,887	474,845	466,155	6,62	260,000	3,25
21 Canada	54,043	75,326	81,662	72,441	1,37	64,991	72,540	82,226	102,532	1,46	74,612	1,02
22 Rest of America	35,042	45,571	79,077	49,588	0,94	40,461	38,046	43,114	50,772	0,72	47,000	0,59
AMERICA TOTAL	687,555	634,078	764,195	410,676	7,79	438,432	517,473	600,185	619,479	8,80	321,455	4,32
23 Australia	60,649	91,149	133,540	110,609	2,10	85,886	83,230	90,933	121,694	1,73	116,272	1,58
24 Rest of Oceania	11,992	16,712	28,029	21,764	0,41	8,245	11,769	13,655	14,984	0,21	18,116	0,22
OCEANIA TOTAL	72,641	107,861	161,569	132,373	2,51	94,131	94,999	110,608	136,678	1,94	134,388	1,80
25 Unknown	3,905	9,810	16,369	2,856	0,05	3,089	3,663	2,180	496	0,01	483	0,01
TOTAL TOURISTS	3,961,112	4,532,411	5,232,873	4,785,900	90,98	5,032,822	4,778,477	5,523,192	6,575,693	92,39	7,564,000	94,50
CRUISE PASS.	489,972	548,822	1,080	475,215	9,02	431,039	479,895	504,074	465,435	6,61	440,000	5,50
GRAND TOTAL	4,461,084	5,081,233	6,312,953	5,261,115	100,00	5,463,861	5,258,372	6,027,266	7,041,128	100,00	8,004,000	100,00

\*\*\*not available

Table 3.1.2  
Tourist Arrivals to Greece  
by Nationality (1986 and 1988)

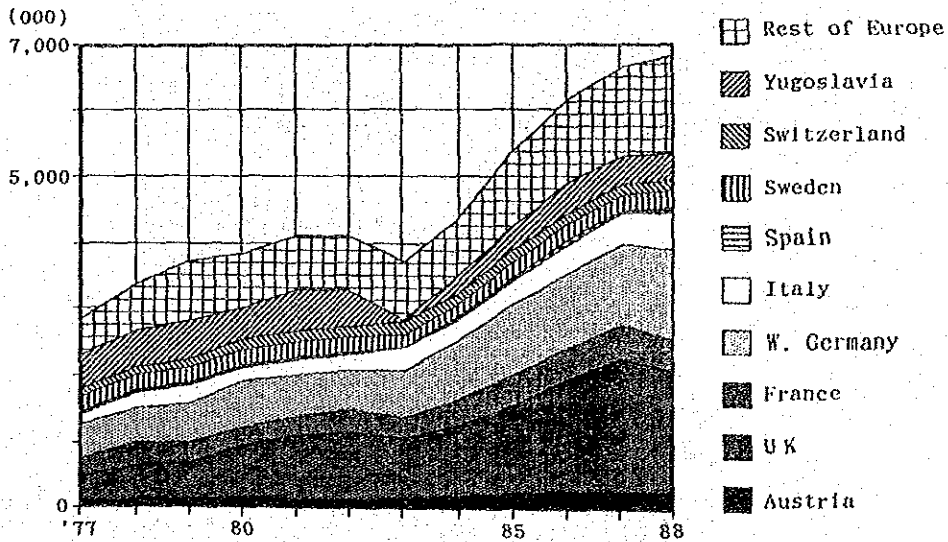
Order	1986			1988		
	Nationality	Number (000)	Share (%)	Nationality	Number (000)	Share (%)
1	United Kingdom	1,710	23.3	United Kingdom	1,790	21.8
2	W. Germany	1,145	15.6	W. Germany	1,382	16.8
3	France	468	6.4	Italy	544	6.6
4	Yugoslavia	467	6.4	France	469	5.7
5	Italy	440	6.0	Netherlands	382	4.7
6	Netherlands	330	4.5	Yugoslavia	345	4.2
7	Austria	293	4.0	Austria	311	3.8
8	Sweden	249	3.4	U.S.A.	295	3.6
9	U.S.A.	204	2.8	Sweden	253	3.1
10	Denmark	192	2.6	Denmark	235	2.9
11	Finland	167	2.3	Finland	198	2.4
12	Switzerland	158	2.1	Switzerland	175	2.1
13	Norway	157	2.1	Belgium**	175	2.1
14	Australia*	140	1.9	Cyprus	140	1.7
15	Belgium**	116	1.6	Norway	125	1.5
16	Cyprus	107	1.5	Australia*	123	1.5
17	Japan	85	1.2	Canada	107	1.3
18	Canada	74	1.0	Japan	105	1.3

\* include New Zealand

\*\* include Luxemburg

Source: GNT0

Figure 3.1.3  
Trend of Tourist Arrivals  
from European Countries (1977 - 1988)



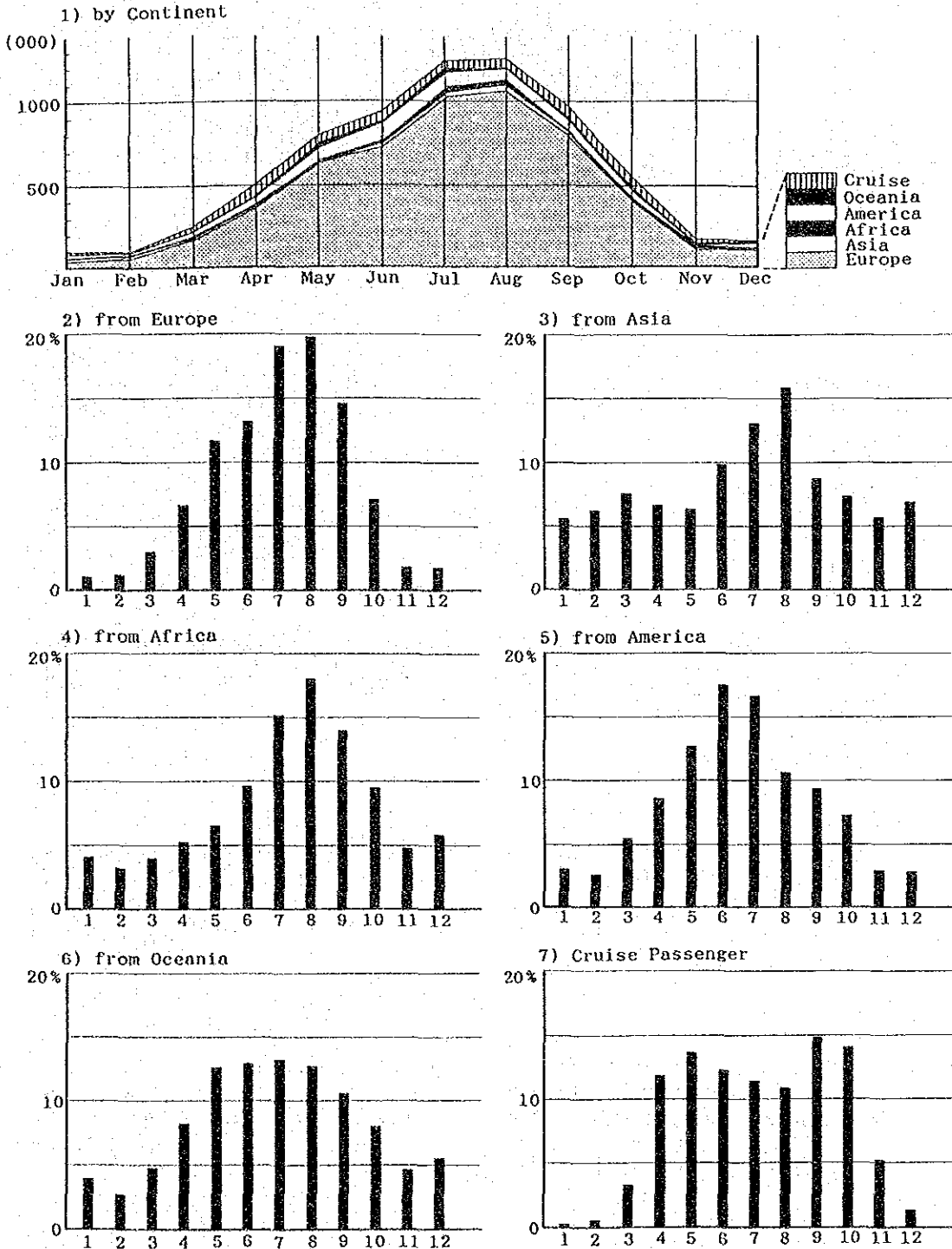
Source: GNT0

### 3.1.3 Arrivals per Month

Tourist arrivals per month show very high peaks for both the months of July and August, and the number of tourists between May and September reaches over 74% of the total tourists every year.

This concentration during summer season is mainly caused by European and American tourists. Tourists from Asia are distributed more evenly throughout the year (see Figure 3.1.4).

Figure 3.1.4  
Tourist Arrivals by Month, 1985



### 3.1.4 Arrivals by Transport Mode

The proportion of transport modes utilized by tourists to Greece has remained almost stable for the past 10 years; 70% by air, 15-20% by sea (including cruise passengers), 10-15% by road and a few percent by railway.

Major entrance points by each transportation mode and respective percentages to the total arrivals are as follows:

- By Air		
Ellinikon (Athens)	:	34%
Herakleion (Crete)	:	11%
Rhodes	:	9%
Corfu	:	8%
- By Sea		
Patras	:	4%
Corfu	:	3%
- By Road		
Euzoni	:	9%

Among tourists by air transport, passengers on charter flights, especially from the European countries, are of the majority. The utilization rate of charter flights as against the total passengers by air is as follows:

- from Europe	:	81.2%
- from Asia	:	3.5% (mainly from Israel)
- from Africa	:	17.8%
- from America	:	6.3%
- from Oceania	:	-

The higher share of charter flights appears in United Kingdom, West Germany, Scandinavia and France; 93, 83, 79 and 76 percent of the total travellers by air, respectively.

### 3.1.5 Stay in Hotel, etc.

#### 1) Type and Category of Hotel

Hotel units account for 88% of nights spent by foreigners and the other supplemental units such as boarding houses and camps account for the rest. Of those who stay in hotels, 33% are in class A hotels, 24% in class B, 19% in class C and 10% in class AA (Luxury).

#### 2) By Region/Area

The distribution of overnight stay in Greece is seen in Table 3.1.3. Of total foreign arrivals and nights in 1984, the Ionian Islands, Aegean Islands and Crete all together share 35% and 58%, respectively. Greater Athens shares 32% of the arrivals and 19% of the nights.

With respect to the distribution of overnight stay by area, major islands such as Crete and Rhodes show increasing tendency since 1975, while decreasing tendency is seen in Athens.

Table 3.1.3  
Number of Tourists and Nights by Region, 1984

Region	No. of Tourists (000)			No. of Nights Per Tourists		No. of Nights (000)		
	Greek	Foreign	Total	Greek	Foreign	Greek	Foreign	Total
Greater Athens (%)	876 (19.9)	2,144 (31.5)	3,021 (26.9)	2.3	2.9	2,006 (18.2)	6,292 (19.2)	8,298 (18.9)
Central Greece (%)	450 (10.2)	486 (7.1)	936 (8.3)	3.2	4.0	1,420 (12.9)	1,948 (5.9)	3,369 (7.7)
Peloponnese (%)	645 (14.6)	929 (13.7)	1,575 (14.0)	2.3	2.7	1,476 (13.4)	2,541 (7.7)	4,018 (9.2)
Ionian Islands (%)	171 (3.9)	414 (6.1)	585 (5.2)	3.4	8.8	575 (5.2)	3,628 (11.1)	4,203 (9.6)
Epirus (%)	259 (5.9)	88 (1.3)	347 (3.1)	1.9	2.6	494 (4.5)	233 (0.7)	727 (1.7)
Thessaly (%)	333 (7.5)	219 (3.2)	552 (4.9)	2.3	2.3	761 (6.9)	500 (1.5)	1,260 (2.9)
Macedonia (%)	1,012 (23.0)	545 (8.0)	1,558 (13.9)	2.3	3.9	2,314 (21.0)	2,137 (6.5)	4,451 (10.2)
Thrace (%)	192 (4.4)	38 (0.6)	230 (2.1)	2.2	2.0	417 (3.8)	76 (0.2)	493 (1.1)
Aegean Island (%)	258 (5.9)	980 (14.4)	1,238 (11.0)	3.8	8.8	969 (8.8)	8,629 (26.3)	9,598 (21.9)
Crete (%)	210 (4.8)	966 (14.2)	1,175 (10.5)	2.8	7.1	585 (5.3)	6,836 (20.8)	7,422 (16.9)
Total (Average) (%)	4,406 (100.0)	6,809 (100.0)	11,216 (100.0)	2.5	4.8	11,017 (100.0)	32,822 (100.0)	43,839 (100.0)

Source: Tourist Statistics (1984 and 1985);  
National Statistical Service of Greece

### 3) Average Number of Days Spent in Hotels, etc., by Nationality

The estimated figures regarding the average number of days spent in hotel, etc. in 1984, range widely from 1.32 days by Yugoslavians to 15.21 days by Austrians and the average for all foreigners is 5.45 days.

### 3.1.6 Japanese Tourists in Greece

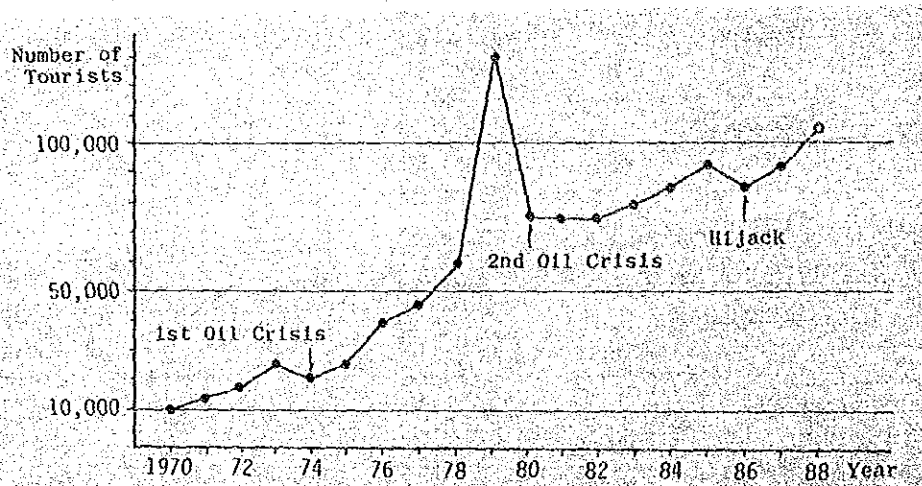
Characteristics of Japanese tourists' demand in Greece are summarized as follows:

#### 1) Yearly Trend

The number of Japanese tourist arrivals in Greece shows an increasing trend, from 10 thousand in 1970 to 105 thousand in 1988. This indicates an average annual growth rate of 13.8%, which is higher than that of total foreign arrivals in Greece (9.5% per annum). But when the period from 1980 is considered, the number of Japanese tourists show 4.2% of annual growth rate against 5.7% for total foreign tourists in Greece.

The number of Japanese tourist was 130 thousand in 1979, which was more than twice bigger than the previous year. This figure is even larger than that in 1988. This significant increase is said to be due to the big sale of a novel by Ikeda Masuo, a famous Japanese artist/novelist, and a related song and movie.

Figure 3.1.5  
Trend of Japanese Tourist Arrivals  
in Greece, 1970-1988



#### 2) Share

The Japanese has only 1.0 to 1.5 % share to total foreign arrivals in the 1980s.

#### 3) Area Distribution

Two types of statistical data, "the number of tourist arrivals by place/transport mode" and "the number of nights spent in hotels by area", in 1985 show the significance of Athens to the Japanese tourists. To wit:

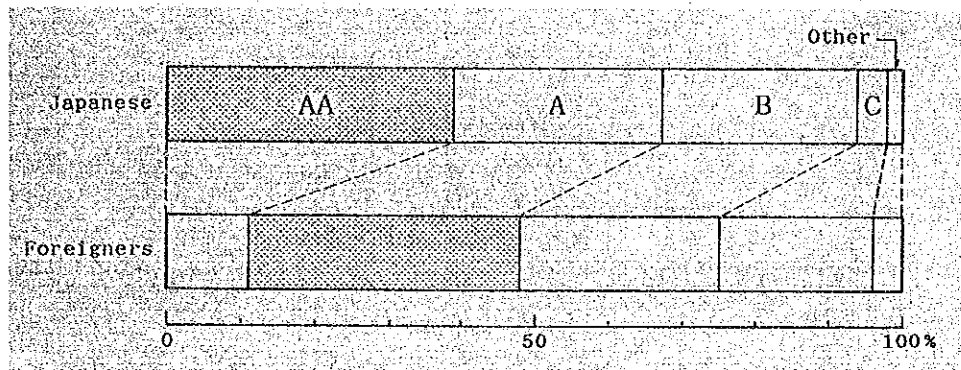


- Over 95 percent of Japanese enter Greece from Ellinikon airport (Athens),
- Eighty-seven percent of overnight stays by Japanese were concentrated within Athens area. This is an extremely high rate compared to 10 percent for the total foreigners. This Japanese tourists' concentration to Athens has increased since 1980 in contrast to the decreasing trend among other foreigners.

4) Type of Accommodation Used

The Japanese tourists prefer AA class (Luxury) hotels, compared to other foreigners as shown in Figure 3.1.6.

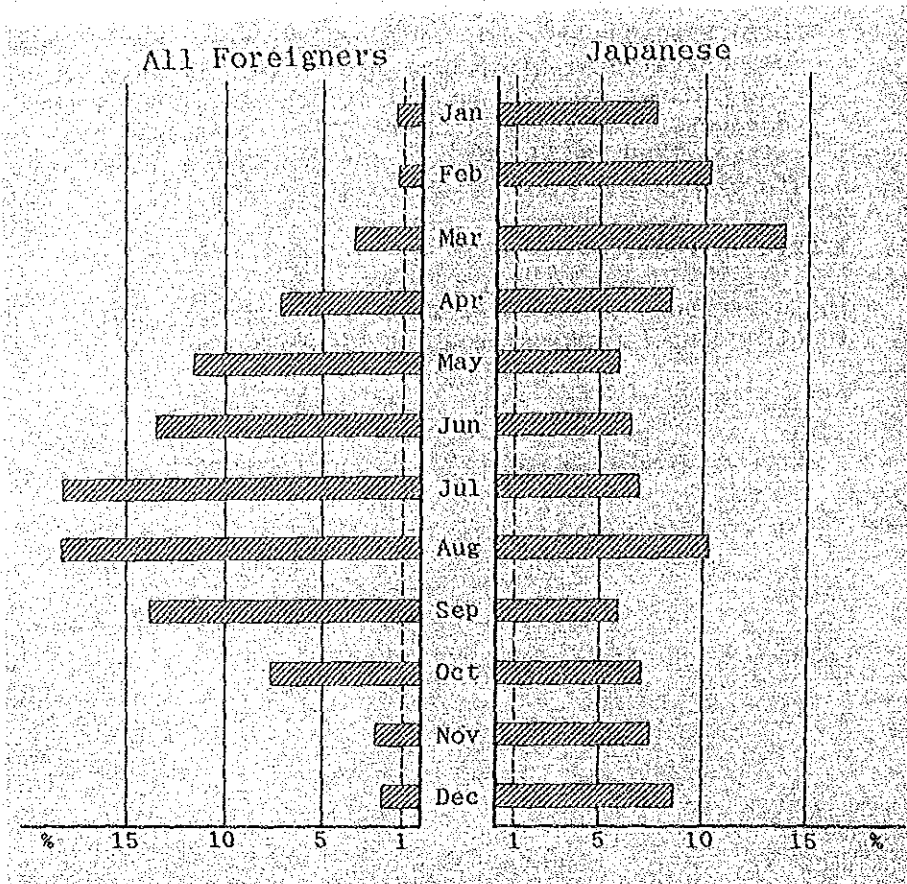
Figure 3.1.6  
Share of Nights Spent by Japanese and Foreigners  
by Accommodation Class, 1985



5) Arrivals per Month

The arrival pattern of Japanese tourists per month is significantly different from those of other foreign tourists. As shown in Figure 3.1.7, arrivals distribute relatively evenly throughout the year with peaks in February, March and August.

Figure 3.1.7  
Monthly Variation of Japanese Tourist Arrivals, 1985



6) Some Characteristics in 1979

Some characteristics of Japanese arrivals in 1979 are as follows:

- The number of arrivals accounted 129 thousand, 110% increase from the previous year.
- Number of nights spent in hotels and other such accommodations increased only by 33%, thus, the average duration of stay decreased. The estimated average number of nights spent are:

1977 : 3.28 days  
 1978 : 2.90 days  
 1979 : 1.83 days  
 1980 : 2.80 days  
 1985 : 2.77 days

- With respect to the number of nights spent in hotels, etc., by area, it was only in the years 1978 to 1980 that Rhodes had a relatively high share (7 to 9% of the total), while in recent years its share is about 3%.
- Arrivals per month in 1979 showed almost the same pattern as that for all foreigners, as shown in Figure 3.1.8.

Figure 3.1.8  
Monthly Variation of Tourist Arrivals, 1979

