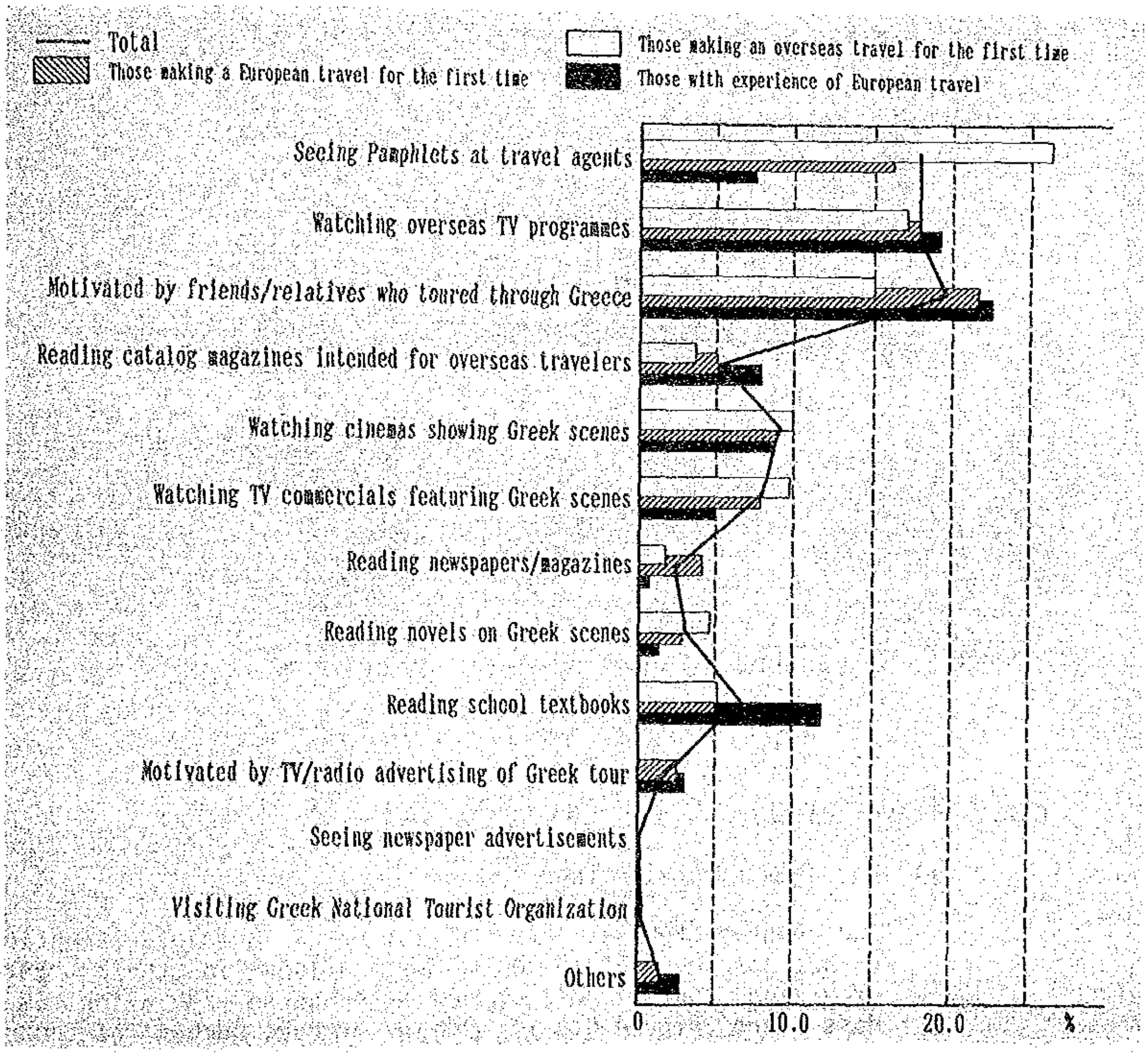
6.2.4 Information on Greek Tour

o As for the sources of tour-motivating information, travel agency pamphlets are important to those making overseas travel for the first time, and word-of-mouth communication to those having already experience of overseas travel (see Figure 6.2.8).

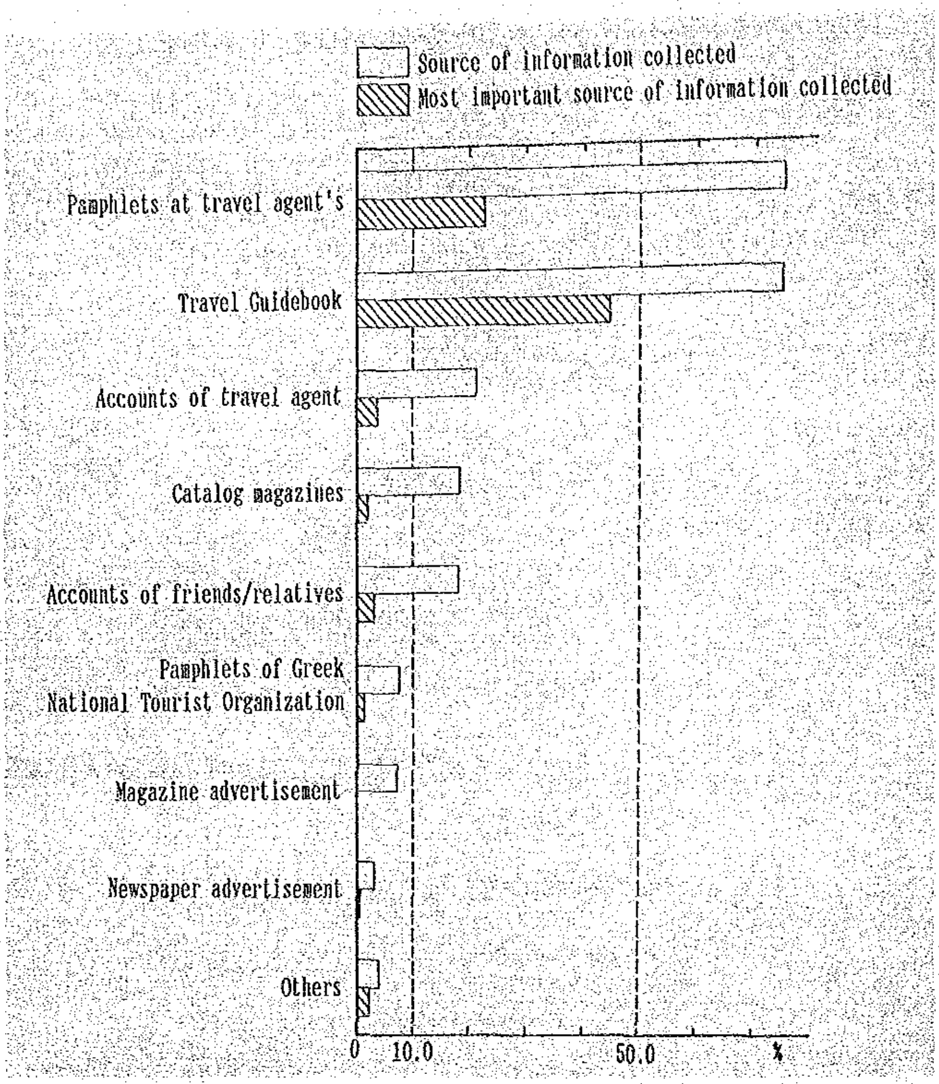
Since one-thirds of the Japanese tourists to Greece have no experience of overseas travel, the travel agency pamphlets are quite important information source in the case of Greek tourism. As can be seen in Figure 6.2.9, many tourists cite that the travel agency pamphlets and travel guide books are the principal sources of information they collected when they planned their tours.

Figure 6.2.8
Strongest Motivation of Greek Tour
by Pattern of Overseas Travel



Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

Figure 6.2.9
Source of Information Collected



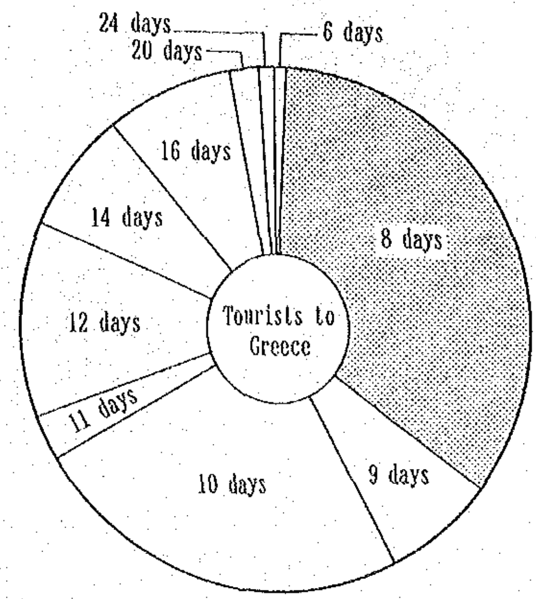
Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

6.2.5 Travel Pattern

1) European Excursion Tour

The Japanese tourists visit Greece not as a *mono-destination* but rather as one of a multi-destinations in their European excursion tour. Their average European tour duration is 10.5 days (see Figure 6.2.10) and the average number of countries they visit is 3.3 (see Figure 6.2.11).

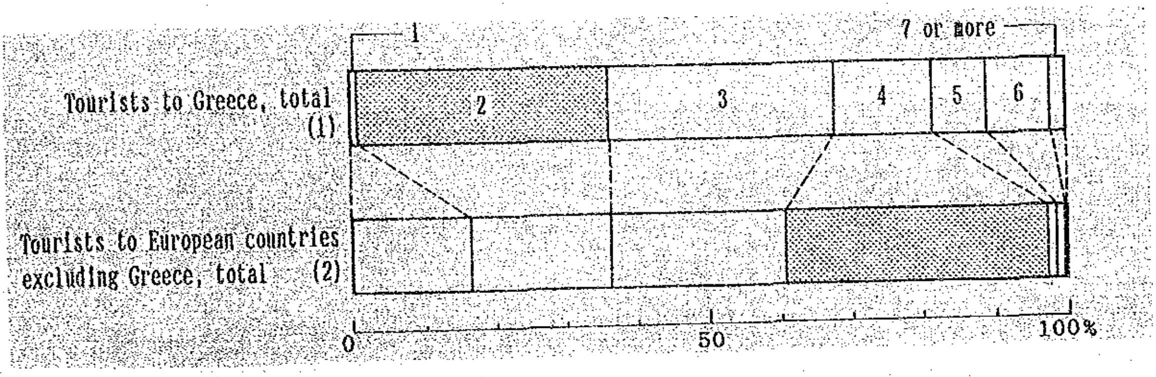
Figure 6.2.10
Number of Days of Travel (Total)



Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

Figure 6.2.11

Number of Countries Visited (Total)

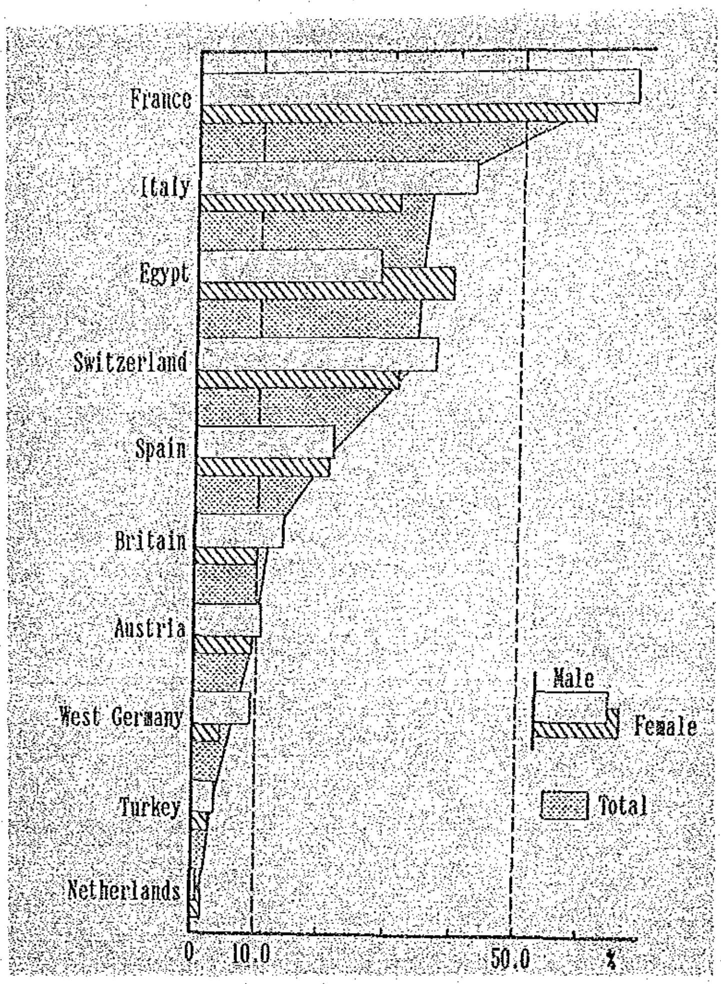


Sources: 1. Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA (October 1988)
2. Questionnaire Survey of Japanese Tourists to Other European Countries, JICA (October 1988)

2) Other Countries Visited

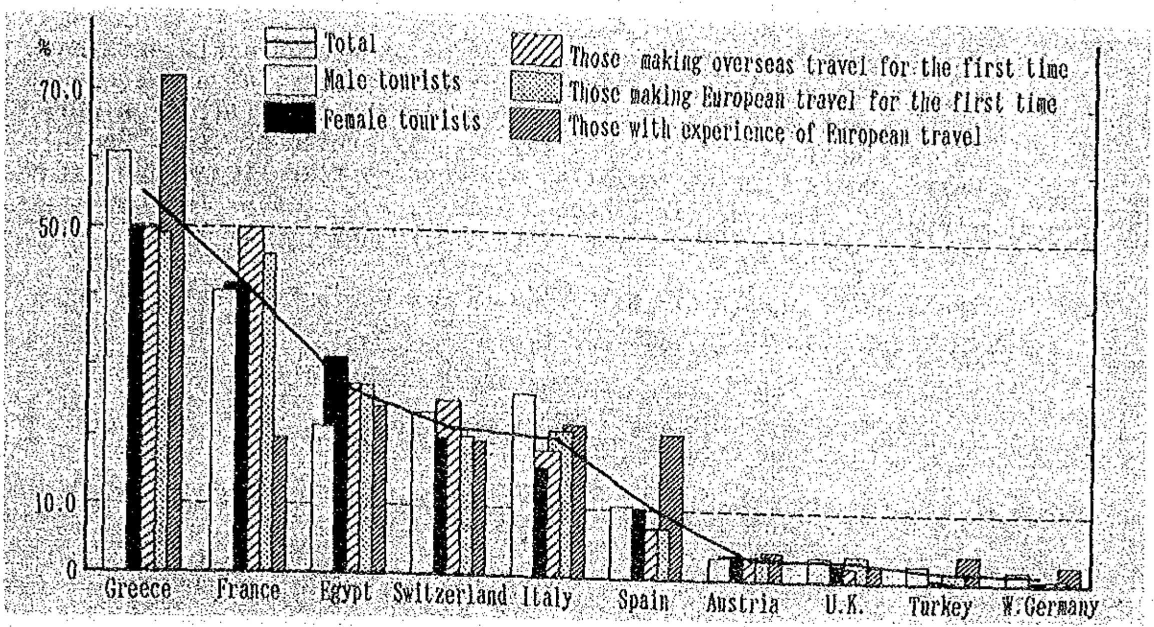
France places first among all countries visited by tourists to Greece (see Figure 6.2.12). Moreover, there are many of the Japanese travellers who identify France as their most favourite destination among the European countries (see Figure 6.2.13).

Figure 6.2.12
Countries Visited (by Sex)



Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

Figure 6.2.13
Most Favourite Destination

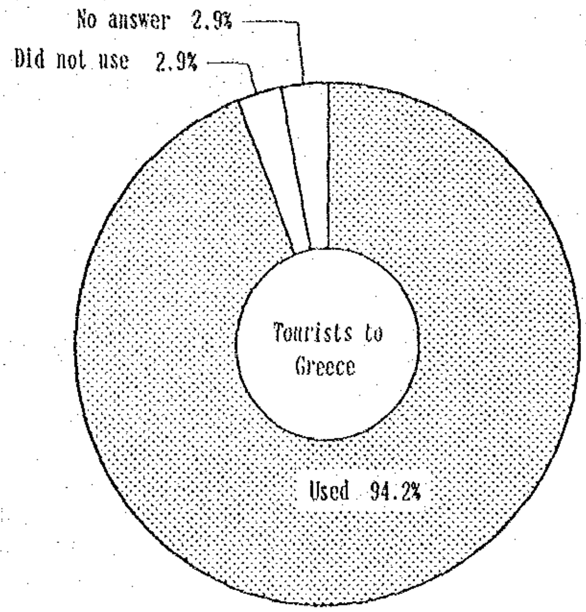


Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA (October 1988)

3) Usership of Package Tours

o Large share of Japanese tourists to Greece are sightseens, and therefore, the ratio of package tour usage is considerably high (see Figure 6.2.14). For this reason, their activities in Greece are rather patternized.

Figure 6.2.14
Usership of Package Tour



Source: "Questionnaire Survey of Japanese Tourists on a Cruise Ship of the Saronic Gulf",JICA (October 1988)

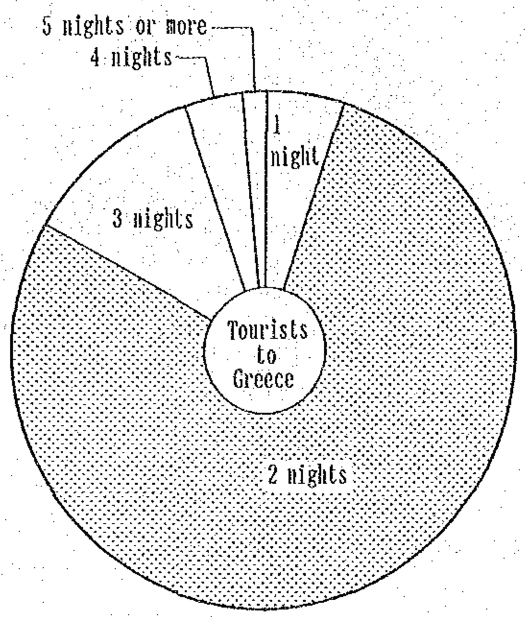
4) Itinerary in Greece

o Typical Japanese tourists in Greece are as follows:

The Japanese travellers usually arrive at Athens early afternoon from various cities in other European countries, do a three-hour city sightseeing and stay overnight in the city (first night). On the next day, they enjoy the one-day cruise of the Saronic Gulf, go to Piraeus to relish sea food at Mikrolimano and stay overnight in the city (second night), and leave for another tourist city in the morning of the third day.

The average length of their stay in Greece is 2.17 days as shown in Figure 6.2.15.

Figure 6.2.15
Lenght of Stay in Greece (Total)



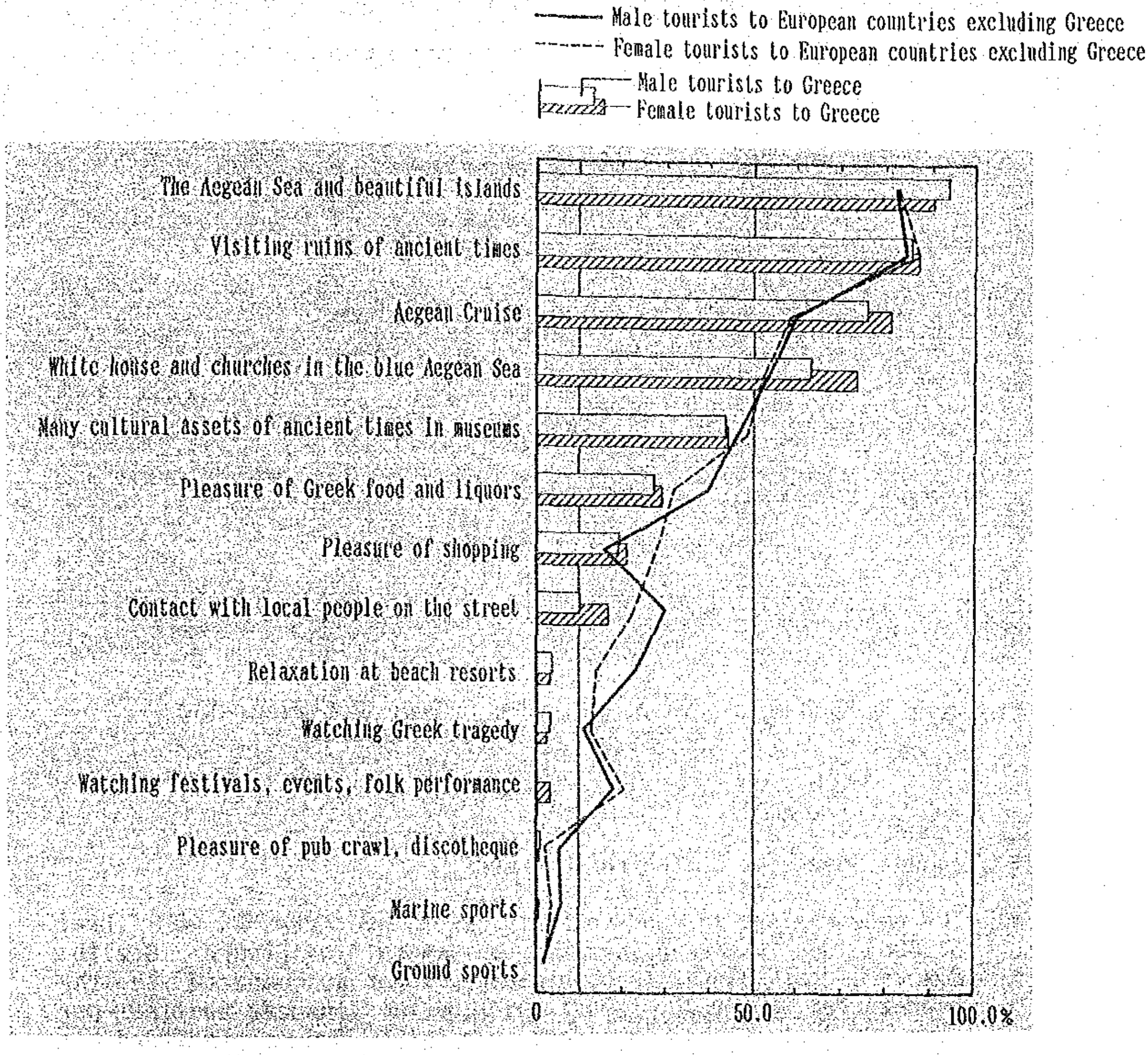
Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

5) Expectations in Greece

o The expected activities of the Japanese tourists to Greece, as shown in Figure 6.2.16, are centered on "viewing natural beauty" (example: the Aegean Sea) and "visiting ruins of ancient times". The ruins of ancient times, represented by the Acropolis, were once the most important of all Greek tourist resources. But today, "the Aegean Sea" is gaining more popularity than "ruins of ancient times" among the Japanese tourists, due to the image "blue sky, blue sea, white house". To fulfil such expectations, in most cases, they do the city sightseeing and one-day cruise of the Saronic Gulf actually (see Figure 6.2.17).

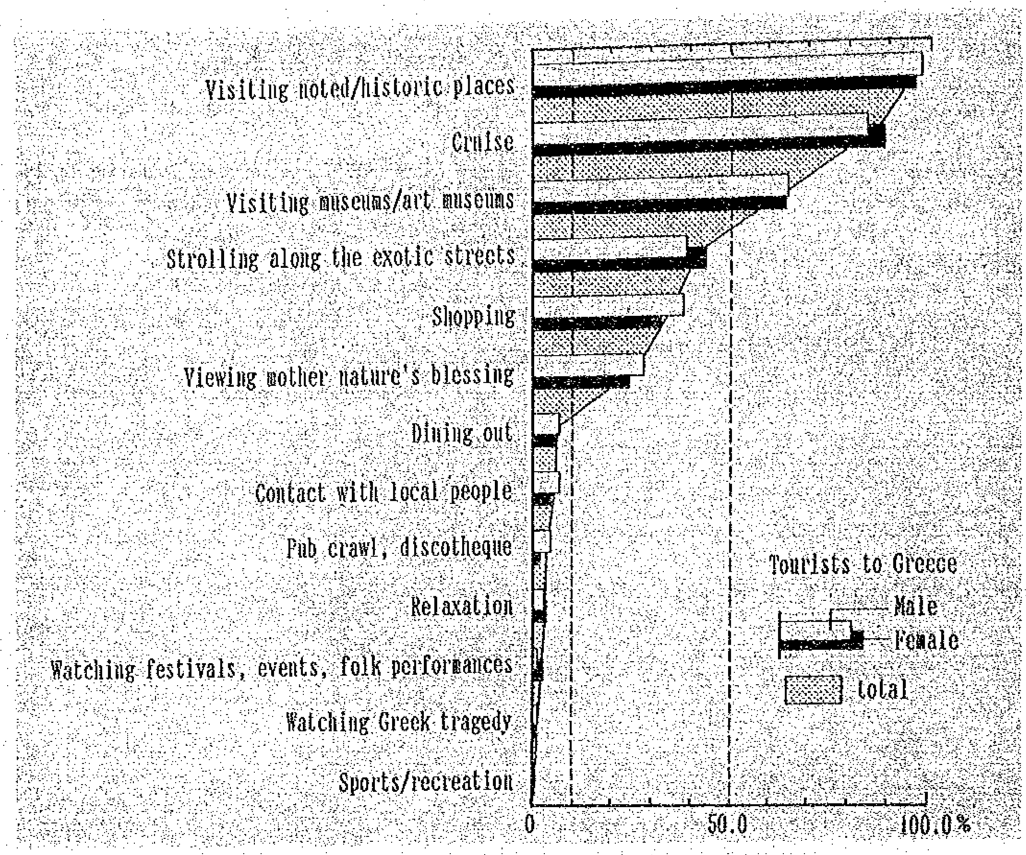
Shopping is one of the most exciting attractions to any overseas travellers, but the Japanese tourists in Greece do not enjoy it because their itinerary does not afford them the time for it.

Figure 6.2.16
Expectations of Tourist Activities in Greece
(by Sex)



Sources: 1. Questionnaire Survey of Japanese Tourists Who Have Been to Greece.
2. Questionnaire Survey of Japanese Tourists to Other European Countries.
3. National Omnibus Survey, JICA (October 1988)

Figure 6.2.17
Main Tourist Activities in Greece
(by Sex)



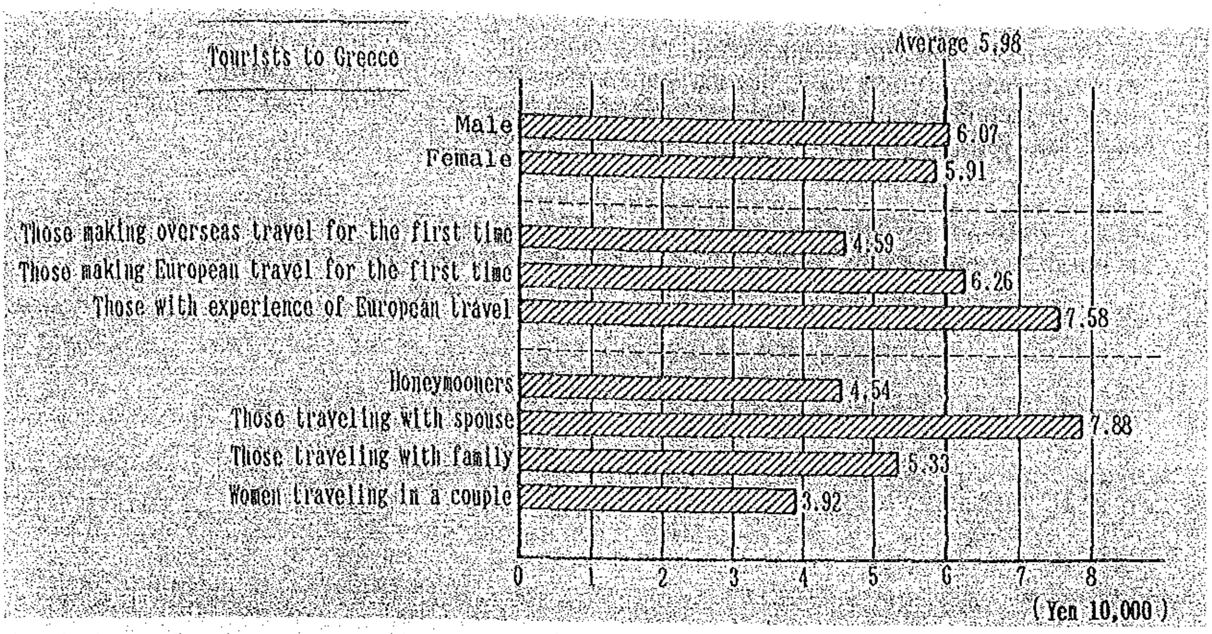
Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA (October 1988)

6) Amount Spent for Souvenirs in Greece

o The amount spent for souvenirs in Greece averages ¥60,000 (Drs. 67,000) per Japanese tourist as shown in Figure 6.2.18. However, this amount is considerably lower as compared to the average ¥88,000 (Drs. 98,000) spent by the Japanese tourist per country during their European tour (with Greece included in their itinerary).

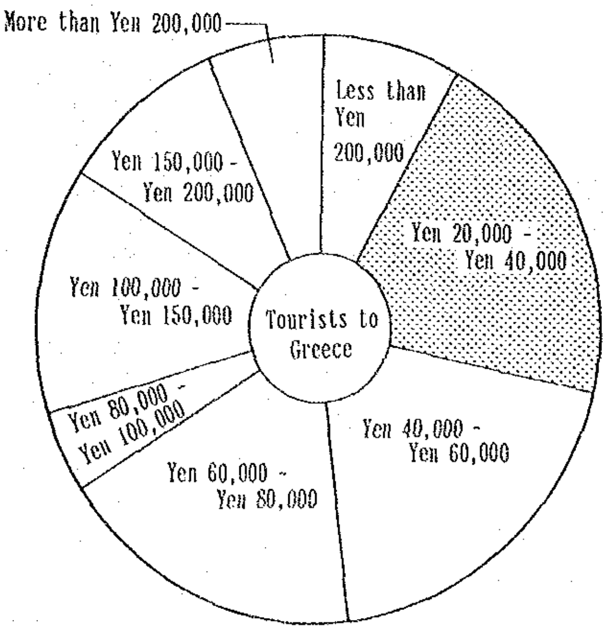
If Paris is combined with Athens in the tour itinerary, there would be many who will purchase high-class products in Paris.

Figure 6.2.18
Average Amount Spent for Souvenirs in Greece



Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

Figure 6.2.19
Amount Spent for Souvenirs per Country
(Total)



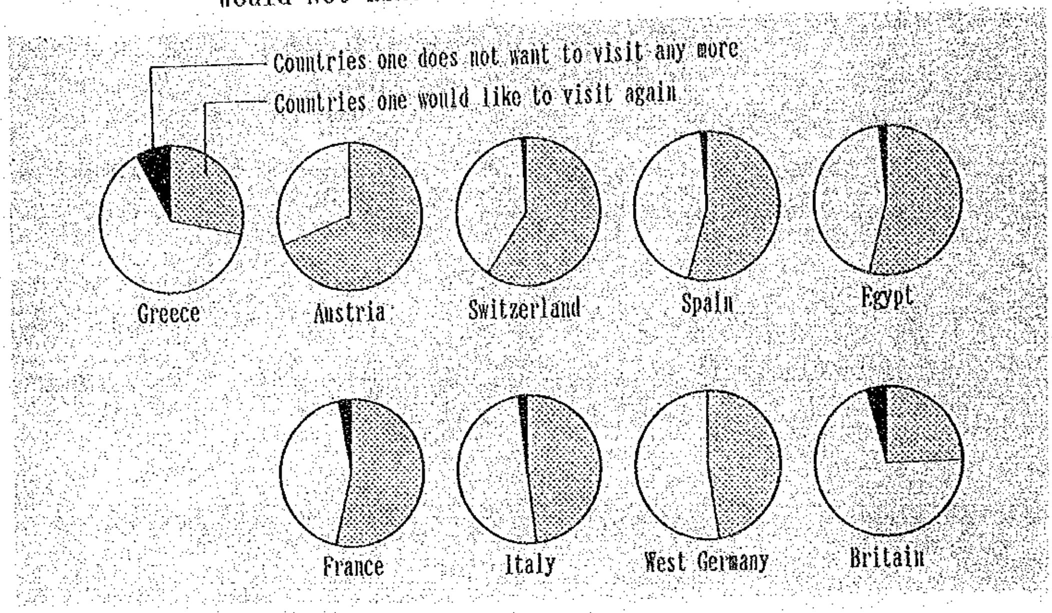
Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

6.2.6 Assessment of Greek Travel

1) Inclination of Visiting Greece Again

On asking about "countries one would like to visit again", it was found that Greece ranks the 8th among the 9 major European countries. Revisit intend for Greece is, thus, low as shown in Figure 6.2.20.

Figure 6.2.20
Countries One Would Like to Visit Again/
Would Not Like to Visit Any More



Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

2) Evaluation of Tourist Facilities

o Generally speaking, the Japanese tourists give high scores for the "sight spots" but low scores for the "meals" (see Figure 6.2.21). Meals are evaluated low regardless of where they are served, at hotels or restaurants, and the group interview disclosed that the lunch served on the cruise ship of the Saronic Gulf was found to be very unsavory by Japanese tourists.

There may be reasons to explain this, the principal reasons of which are as follows:

a) Meat is excessively roasted, thus making it hard.
b) Dish presentation is not appetizing.

Some Japanese say that olive oil does not appeal to their palate, but olive oil might be familialized, as cheese has been, among Japanese.

As for souvenirs, price is accepted as reasonable, but most tourists are dissatisfied with their quality and assortment.

Airport facilities are also given low evaluation rates. The itinerary of many Japanese tourists makes Athens the first destination in Europe, but as the entrance to the longed-for Europe, the Ellenikon Airport would be open to the criticism of being a little too poor in appearance and functions. For instance, the West Terminal, which is used for departures and arrivals of Olympic Airways' planes, is needful of improvement in terms of international telephone service facilities and other aspects.

o Sight spots are given fairly high scores, but the One-day cruise is given low evaluations despite its being the prime attraction of the Greek tour.

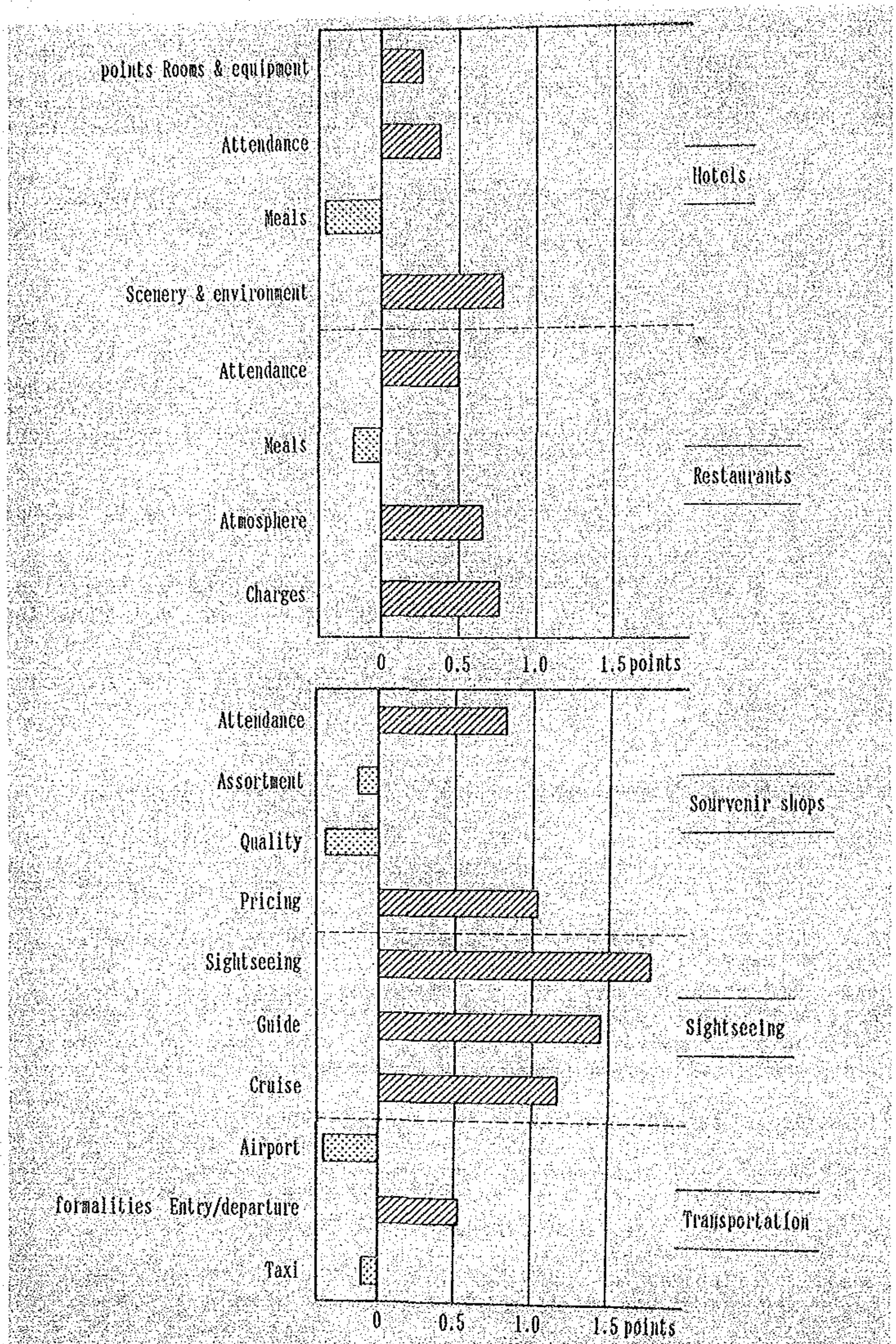
This may be attributed to the following reasons:

a) The Aegean Sea evokes an image of "blue sky and blue sea", but from autumn to winter, when many Japanese tourists visit Greece, the weather is cloudy for days, making the sea look lead-colored, which is quite contrary to the projected or promoted image.

b) The cruise ship is often jampacked, making it impossible for the foreign tourists to find a seat.

c) The lunch served on the cruise ship is not agreeable, and the show given on the way back to the port is not attractive enough.

Figure 6.2.21
Evaluation of Tourist Facilities



Note: Evaluation was made by giving 3 points to "excellent," 0 point to "good to fair," and -3 points to "poor."

Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA(October 1988)

3) Evaluation of Tourist Resources

An assessment of the tourist resources of various European countries is given in Table 6.2.3. This evaluation was done by the Japanese tourists who visited Greece during their European tour.

o It is indicated in this table that Greece is appreciated for its beautiful seas, cruise and notable historic places. However, it did not get the same positive evaluation rating as the other countries in the following aspects:

- Countryside scenery, which is topped by Switzerland.
- Fine arts/performing arts, which is topped by Spain, France and Italy.
- Genuine ethnic delicacies, which is noted in Spain and France.
- Cultural exchange through socializing with the local folks as it is noted in Spain.
- Festivals and related activities, which is also favourably noted in Spain.
- Pleasure of relaxation, which is identified to Switzerland.
- Shopping in France, Italy, Spain and the United Kingdom.

Table 6.2.3
Assessment of the Tourist Resources in Europe

	Natural resources		Cultural resources						Recreational resources				
	Fulness of nature such as beautiful mountains/seas	Pastoral countryside scenery	Visiting ruins/historic places	Exotic streets	Refined culture such as fine arts and performing arts	Pleasure of genuine ethnic delicacies	Contact with local people	Watching festivals, events and folk performances	Grand scale sports/recreation	Cruise	Shopping	Pleasure of relaxation	Pleasure of pub crawl/discotheque
1. Greece	45.3	0.7	41.0	39.6	5.8	3.7	1.6	0.7	0.1	45.0	2.9	4.0	0.7
2. France	3.5	1.1	33.8	18.4	39.9	16.2	2.7	0.4	0.5	0.3	34.5	0.1	1.3
3. Switzerland	64.9	27.8	6.7	9.9	2.5	5.3	2.0	0.5	6.7	0	3.3	11.6	0.3
4. Austria	6.9	0.1	24.7	10.6	28.3	7.6	0.6	0.9	0	0	0.4	0.6	2.3
5. West Germany	11.8	12.7	48.5	50.4	10.6	9.5	2.1	1.8	0	0.4	6.1	1.7	0.7
6. Britain	0.1	1.0	25.1	18.4	9.6	5.8	1.1	1.3	0	0	14.3	0.4	0.1
7. Italy	9.5	0.3	70.3	49.2	39.0	14.8	4.4	1.7	0.2	1.9	21.0	1.7	2.5
8. Spain	3.3	1.9	83.1	69.5	55.1	26.6	19.4	14.4	0	0	20.4	0.5	4.3

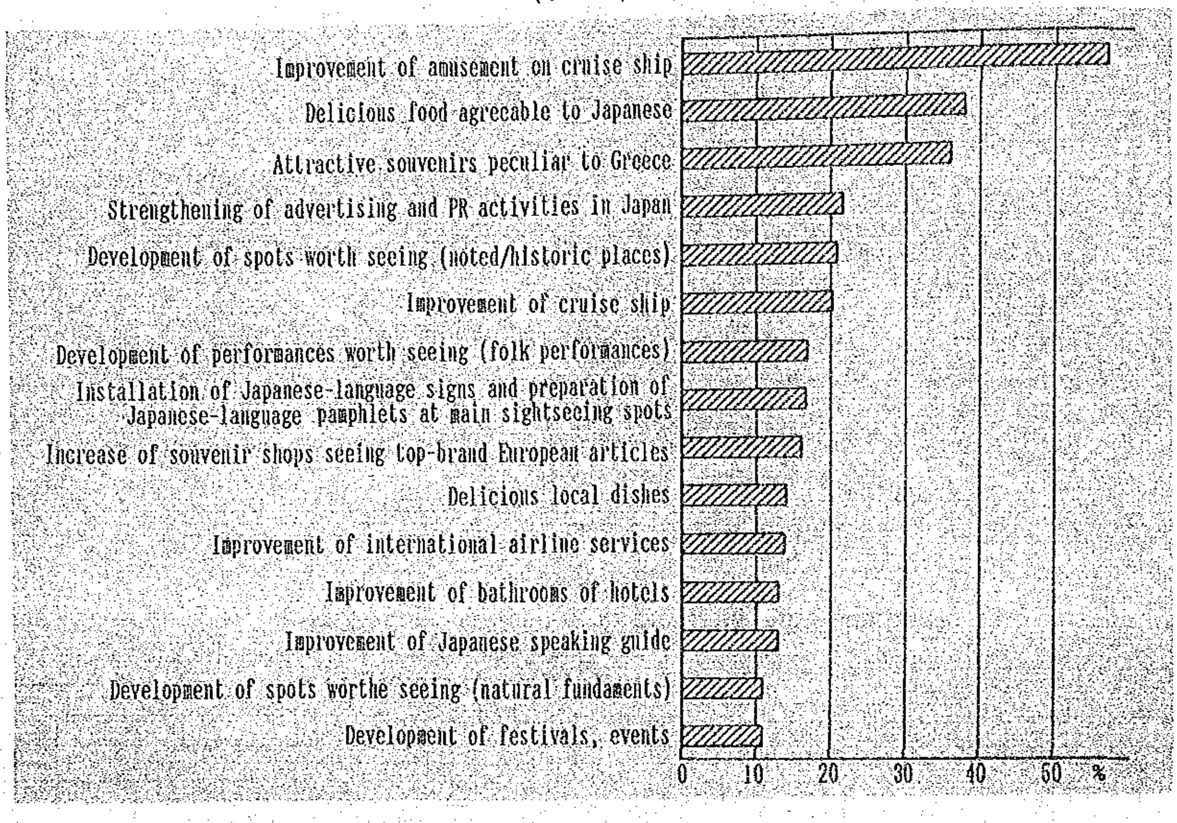
Note: Scores indicate the percentages of those who entertain expectations for individual elements of resources. In the case of Greece, for example, 45.3 out of each 100 tourists evince expectations for the "fulness of nature such as beautiful maintains/seas" element of natural resources.

Sources: 1. Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA (October 1988)
2. Questionnaire Survey of Japanese Tourists to Other European Countries, JICA (October 1988)

4) Improvements Required for Greek Travel

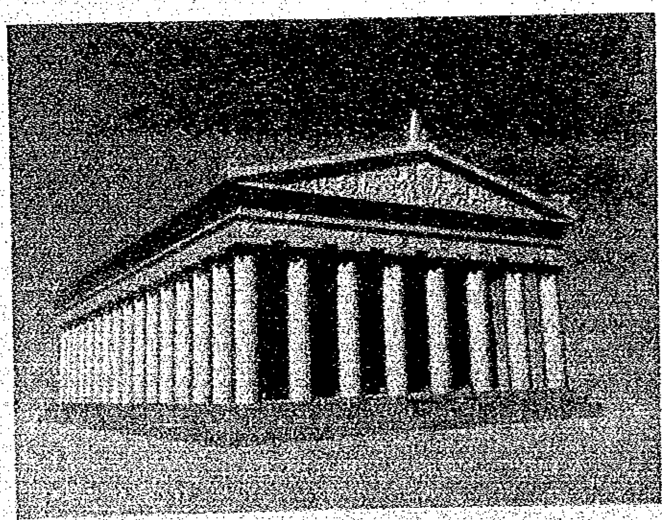
- Improvements deemed necessary to boost the tourism of Greece were subjected to a ranking test done by the same Japanese tourist respondents. From the results, upgrading of the "amusement on the cruise ship" was given the highest priority (see Figure 6.2.22).

Figure 6.2.22
Improvements Required for Greek Tour
(Total)



Source: Questionnaire Survey of Japanese Tourists Who Have Been to Greece, JICA (October 1988)

CHAPTER 7 ANALYSIS OF PRESENT CONDITION



CHAPTER 7 ANALYSIS OF PRESENT CONDITION

7.1 Resources and Facilities

7.1.1 Tourism Resources

Greece has rich natural and cultural tourism resources all over the country. Natural resources comprise numerous islands and seas, beaches, mountains, caves, hot springs, etc. while the cultural resources comprise various ruins/historical remains of different eras. Various tourism facilities and services to support international and domestic tourism are fairly well provided in general.

1) Natural Resources

a) Islands and Sea

The numerous islands with different size and characters are the most attractive tourism resource for the average tourists. Many of the islands are not only with natural beauties but are also endowed with historical and traditional assets/activities. Small islands with pearl white houses against the deep blue sky are full of poetic sentiment to those that visit the islands by cruise ship.

Among the large islands, Crete (8,340 sq.km and a population of 502 thousand), Rhodes (1,800 sq.km. and a population of 90 thousand), and Corfu (641 sq.km. and a population of 34 thousand) are among the popular islands for tourists. There are also many attractive small islands such as the Mykonos, Delos, Santorini of the Cyclades and the Aigyna, Polos and Hydra near Athens.

b) Beaches and Marine Leisure Activities

There are great number of beaches all along the long coastline of the mainland and the islands. They vary from the simple untouched beaches to those well equipped ones. Public beaches and most of the beaches managed by resort hotels of AA to B classes have different facilities such as restaurants, dressing rooms, piers, play ground, tennis courts, and training centers and facilities for water skiing, wind surfing, scuba diving and sailing. At present, there are 16 beaches managed by the public sector; 14 by the Greek National Tourism Organization (GNTO); and two by local governments.

o Although not a many Japanese tourists visit Greece for the purpose of marine resort/sports activities, the inclusion of them in the travel itinerary would enhance the attractiveness of Greek tours for Japanese.

c) Skiing

Greek mountains with altitudes higher than 1,800 meters generally offer skiing opportunities from December to March, while Mt. Olympos, Parnassos and the Pindos till the month of May. However, their snow quality, scale and facilities are not competitive compared with representative ski resorts such as in the Alps.

d) Caves

There are about 7,500 stalactite caves in Greece, of which 3,400 are in Crete. Some of these caves have long underground water ways and some were used or lived-in by ancient people. Nine caves are provided with facilities, such as lighting, handrails, signboards, and other administrative facilities, for sightseeing purposes.

o These caves are not considered promising tourism resources except for to those with special interest for caves, unless poor accessibility is improved.

e) Health Spas

Hot springs in Greece mostly exist in the coastal areas of the mainland. Major spas which are utilized by foreign visitors are about 20, of which 9 are directly managed by GNTO.

The number of hot spring users have doubled in the past 15 years, from 72,900 visitors in 1970 to 134,900 in 1985.

o The hot springs are used for medical treatment in Greece, and they are quite different from those in Japan, which are mainly for leisure/recreation purposes.

f) Other Sports

All the other types of sports and recreational activities can be enjoyed in Greece.

There are four golf courses in the country. Glifada Golf Club , is located 16 kms from Athens, Corfu Golf Club, which is located 14 kms from Corfu, Afandou Golf Club located 19 kms from Rhodes City, and Porto Carras Golf Course in Chalcidice. They are mainly utilized by resort vacationers except Glifada Golf Club.

Although those courses can provide playing opportunities throughout the year except middays of summer and winter, the potential of world-wide popular golf course development in Greece is rather poor.

2) Cultural Resource

a) Greek Culture as a Tourism Resource

Greek culture and its history are very important by themselves for tourism resources. Ruins/Archaeological sites of Minoan, Mycenaean, Classical and Hellenistic periods which are the cradle of European civilization are scattered all over the country.

But it is rather difficult to find historical heritages of the Medieval and Modern Ages, while other European countries are abundant in those resources.

b) Archaeological Sites

Numerous historical spots related to ancient Greece exist all over the country. Major spots with abundant historical assets from ancient Greece are the Acropolis (Athens), Delphi (Central Greece), Knossos (Crete), Mycenae, Epidauros and Olympia (Peleponnese), etc. Those developed in Byzantine Age (4C to 15C) and in the following ages are Nauplion, Mystra (Peloponnese), Rhodes, Corfu, etc. The major sites managed by the Ministry of Culture are listed in Table 7.1.1.

A total number of visitors to the ruins/buildings opened for tourists with charges reached 7.2 million (with Drs. 678 million) and 7.8 million (with Drs. 1,086 million) in 1984 and 1985, respectively.

o The Japanese are taught about the history of the ancient Greece in their childhoods even at elementary/secondary school and these archaeological sites are one of major expectations of Japanese tourists in Greece. And most of the Japanese tourists visit there with great interests.

o However, the guidance or signboards which will help better understanding of the tourists are not sufficient or are not properly provided even in Athens.

c) Museums

Museums in Greece are roughly classified into the following three types:

i) Archaeological Museum: which displays excavations of ancient Greece. There are 88 museums of this type.

ii) Byzantine Museum: which stores the art collection of Byzantine age (4C - 5C).

Table 7.1.1
Major Archaeological Sites in Greece

Town/Regions	Site/Facility	Closed on	Fees (Drs)	Open Hour	
				Weekday	Sunday
Athens	Acropolis Archaeological Site	-	600	7:30-19:15	8:00-18:30
	Ancient Agora	-	400	9:00-14:00	10:00-14:00
	Dionyssus Theatre	-	200	9:00-14:45	9:00-13:45
	Keramikos Archaeological Site	-	200	8:45-15:00	9:30-14:30
	Roman Forum	-	200	9:00-15:00	9:00-14:00
	Temple of Olympian Zeus	-	200	8:45-15:00	9:30-14:30
Attica	Elefsina Archaeological Site	-	200	8:45-15:00	9:30-14:30
	Sounion	-	300	9:00-Sunset	10:00-Sunset
	Vravrona Archaeological Site	-	200	9:00-15:00	9:30-14:30
Corinth	Archaeological Site	-	400	8:00-19:00	8:00-18:00
Crete	Aghia Trias Archaeological Site	-	200	8:45-15:00	9:30-14:30
	Knossos Archaeological Site	-	500	8:00-19:00	8:00-18:00
	Phaestos	-	300	8:00-19:00	8:00-18:00
	Tylissos	-	200	8:45-15:00	9:30-14:30
	Gortys	-	200	8:00-19:00	8:00-18:00
	Mallia	-	200	8:45-15:00	9:30-14:30
	Heraklion Harbour Fortress	-	200	8:45-15:00	9:30-14:30
Delos	Archaeological Site	-	500	8:45-15:00	9:30-14:30
Delphi	Archaeological Site	-	400	8:00-19:00	8:00-18:00
Aigina	Temple of Ahaia	-	300	8:00-19:00	8:00-18:00
Epidauros	Archaeological Site	-	500	8:00-19:00	8:00-18:00
Philippi	Archaeological Site	-	200	9:00-17:00	10:00-17:00
Kos	Castle	Tue.	200	8:45-15:00	9:30-14:30
	Restored Ancient Dwelling	Tue.	200	8:45-15:00	9:30-14:30
Lesbos	Castle of Mytliene	Mon. Tue.	200	15:00-18:00 (Wed. Thu.)	9:00-18:00 (Sat. Sun.)
Melos	Catacombs	Wed. Sun.	200	9:00-14:30	-
Mycenae	Archaeological Site	-	500	8:00-19:00	8:00-18:00
Mystra	Archaeological Site	-	400	8:00-19:00	8:00-18:00
Nauplion	Palamidi Fortress	-	200	8:00-19:00	8:00-18:00
Olympia	Archaeological Site	-	400	8:00-19:00	8:00-18:00
Pella	Archaeological Site	-	200	8:45-15:00	9:30-14:30
Pilos	Nestor's Palace	-	200	8:45-15:00	9:30-14:30
Rhodes	Camiros	-	200	8:45-17:00	9:30-17:00
	Acropolis of Talyssos	-	200	8:45-17:00	9:30-17:00
	Acropolis of Lindos	-	400	8:45-17:00	9:30-17:00
Samos	Hera Temple	-	200	8:00-14:00	8:00-13:00
Samothraki	Archaeological Site	-	200	8:45-15:00	9:30-14:30
Santorini	Akrotirion Thiras	-	500	8:00-19:00	8:00-18:00
Tiryns	Archaeological Site	-	300	8:00-19:00	8:00-18:00
Vergina	Archaeological Site	-	300	8:45-15:00	9:30-14:30

Source: GNTO

iii) Other Historical/Ethnic Museum

A total number of visitors to the museums is 3.2 million and 3.5 million in 1984 and 1985, respectively, while the total amounts of entrance fee are Drs. 313 million and Drs. 429 million in the respective year. Major ones are the National Archaeological Museum (Athens), Delphi Museum (Central Greece), Herakleion Museum (Crete), Ancient Olympia Museum (Peloponnese), and Palace of the Knights (Rhodes).

o Since the exhibits in these museum are important for foreigners to deeply comprehend the ancient Greek culture, the attractive presentation with helpful explanation to the tourists is necessary.

The exhibitions at Delphi Museum and Ancient Olympia Museum, for instance, are considered appropriate in scale and easy to understand for general tourists.

Byzantine Museum and Benaki Museum, both in Athens, exhibit a remarkable series of icons, collection of regional costumes and traditional jewelry, and so on. These displays are more accessible to the average visitors than the excavations of ancient Greece.

d) Other Attractions

There are many other tourist attractions such as festivals, artistic events and sports events. Most of them are concentrated in summer, although some of them are held in different season.

Festivals: Major ones, most of which are organized by GNTO, are as follows:

(i) Athens Festival: This was inaugurated 30 years ago and now is of international acclaim. It is held at Herod Atticus Theatre between June and September annually, and presents performances of theatre, opera, ballet, modern dance, and music by international artists.

(ii) Epidauros Festival: This is held at the ancient theatre of Epidauros 154 kms from Athens and specializes in the performance of ancient Greek drama. Many bus tours from Athens are organized to visit the festival performances.

(iii) Sound and Light: Music, sound, and light effects while listening to historical texts are presented on Pnyx hill opposite the Acropolis from April to October. Explanations are in English, French, and German.

(iv) Lycabettos Festival: Various performances are staged at Lycabettus open theatre in Athens from mid-June to end of August.

(v) Greek folk dance at Dora Stratou Theatre in Athens: Performances of Greek folk dances are presented from June to September.

(vi) Wine Festival: Festivals are held every summer at various places for the celebration of Dionysus. They are full of fun, offering a wide range of free Greek wine as well as varied programme of Greek songs and dances.

(vii) "Veakio" Municipal Amphitheatre of Piraeus: various performing arts are offered from June to September.

Sports Event: There are some international sports event such as 'Acropolis rally', "Spartaslon", 250 km long marathon race between Athens and Sparta, international Athens Marathon, etc. They are mostly held during June and September.

o These events, especially Athens Festival and Epidauros Festival, are famous and attractive to foreign tourists as well as Greek people, but Japanese tourists don't know well about those events.

7.1.2 Tourism Facilities and Industries

Tourism industries are defined as those which cover all activities directly or indirectly producing goods and services intended for tourism consumption. This section intends to explain certain aspects of tourism industries based on the information obtained.

1) Accommodations

a) Types of Accommodations and Their Capacities

Accommodations available for tourists in Greece are composed of different types of facilities. As shown in Table 7.1.2, those other than hotels especially room to rent provide considerable capacities which normally absorb peak demands during summer.

Table 7.1.2
Capacity of Accommodation Establishments, 1988

Type	Capacity
Licensed Hotel Accommodation	395,812 beds
Licensed Room to Rent	219,318 beds
Licensed Campings	75,410 persons
Yachts	12,000 beds
Cruise-ships	12,000 beds

Source: 1988 Annual Report, GNTO

Table 7.1.3
Capacity of Licensed Accommodation Establishments, 1988

	Category	Number of Establishments	Number of Rooms	Number of Beds
HOTELS	Deluxe	42	10389	19513
	A class	240	40748	76098
	B class	660	46632	87341
	C class	1858	59372	111044
	D class	970	16034	30760
	E class	734	8479	16847
BUNGALOWS	Deluxe	3	297	591
	A class	7	814	1532
	B class	25	1606	3094
	C class	13	382	739
MOTELS	Deluxe	2	277	541
	A class	6	532	1024
	B class	22	872	1651
	C class	1	30	58
APARTMENT HOTELS	A class	93	2276	4454
	B class	129	2037	4086
	C class	475	7760	13839
	D class	35	442	802
GUEST HOUSES	A class	53	567	1181
	B class	537	8079	15557
	C class	-	-	-
INNS		46	291	607
TOTAL		6129	210191	391358

Source: G.N.T.O./Establishments Supervision Dept.

These licensed accommodation establishments are classified into three to six categories according to GNTO standard. As shown in Table 7.1.3, hotels are categorized into Deluxe (AA), A, B, C, D and E, while others three to four classes.

The classification system of hotels is presently under review and it is expected a new standard will be formulated.

b) Hotel

Capacities

There are 5,200 hotels in the country as of 1985 with about 350 thousand hotel beds which increased considerably from 80 thousand in 1965. Distribution of hotels and hotel beds by region is shown in Table 7.1.4 and 7.1.5:

The number of beds are relatively concentrated in several regions such as Aegean Islands, Crete and Central Greece. These regions share more than 60% of the total.

Hotels with higher standards AA and A class are also concentrated in resort areas such as the Aegean and Ionian Islands, especially Crete, Rhodes and Corfu and large cities like Athens and Thessaloniki.

Expansion of the number of beds between 1981 and 1985 is significant in Crete, Aegean Islands, Ionian Islands and Thessaly regions.

Table 7.1.4
Hotel Capacity, by Geographic Region

	No. of Hotel Units			No. of Hotel Beds			Ave. Hotel Size: No. of Beds/Unit		1985/1981 Ratio	
Region	1981	1985	(%)	1981	1985	(%)	1981	1985	Hotel Units	Hotel Beds
Greater Athens	581	608	11.7	52,020	59,787	17.2	90	98	1.05	1.15
Rest of Central and Euboea	756	806	15.5	41,645	39,807	11.4	55	49	1.07	0.96
Peloponnese	561	608	11.7	34,466	37,328	10.7	61	61	1.08	1.08
Ionian Islands	245	365	7.0	23,380	30,266	8.7	95	83	1.49	1.29
Epirus	104	114	2.2	4,906	5,801	1.7	47	51	1.10	1.18
Thessaly	188	314	6.0	10,277	14,215	4.1	55	45	1.67	1.38
Macedonia	482	506	9.7	31,919	33,782	9.7	66	67	1.05	1.06
Thrace	60	66	1.3	2,662	3,318	0.9	44	50	1.10	1.25
Aegean Islands	722	1,117	21.5	53,296	75,450	21.7	74	75	1.55	1.42
Crete	406	697	13.4	32,449	48,417	13.9	80	77	1.72	1.49
Total	4,105	5,201	100.0	286,020	348,171	100.0	70	67	1.27	1.22

Source: Tourism Statistic 1984/85

Table 7.1.5
Distribution of Hotel Capacity by Category and Region

Region	Hotel Units						Beds					
	AA	A	B	C	D,E	Total	AA	A	B	C	D,E	Total
Greater Athens	20	75	175	286	162	718	9,015	11,032	18,531	21,125	6,118	65,821
Rest of Central and Euboea	-	18	188	339	203	748	-	2,430	12,547	14,689	5,457	35,123
Peloponnese	2	31	103	224	216	576	210	6,784	10,485	12,041	4,921	34,441
Ionian Islands	5	40	88	204	90	427	2,052	9,600	10,629	9,249	2,622	34,152
Epirus	-	1	26	52	39	118	-	43	2,258	2,848	1,192	6,341
Thessaly	1	21	58	132	134	346	424	1,404	3,428	6,077	3,893	15,226
Macedonia	2	17	90	173	231	513	1,542	5,956	11,249	9,719	7,002	35,468
Thrace	-	1	16	23	19	59	-	99	1,492	1,368	564	3,523
Aegean Islands	5	97	293	494	405	1,294	3,091	26,982	19,227	25,149	10,084	84,533
Crete	8	62	215	380	175	840	3,252	17,527	13,455	17,105	4,263	55,602
Total	43	363	1,252	2,307	1,674	5,639	19,586	81,857	103,301	119,370	46,116	370,230

Source: Greece Hotel Guide 1988

Occupancy rate

Occupancy of the hotels varies considerably by region and also by hotel category. As shown in Table 7.1.6 hotels in resort areas such as Corfu, Crete, Rhodes and Aegean Islands generally show high occupancy rates, especially those with AA, A and B categories in Crete have average occupancy of higher than 80%. The hotels with higher categories in Corfu, Rhodes and Aegean Islands also have high occupancy rates. In these areas, accommodations capacities have been always in short during summer.

As shown in Table 7.1.7, occupancy during summer are extremely high, while that during winter very low. In fact, many hotels are closed or not in full operation between November and March.

Table 7.1.7
Hotel Occupancy Rates by Month, 1987 (Selected Areas)

Month	Athens	Rhodes	Crete	Myconos	Santorini
January	26.7	21.8	18.8	25.2	5.3
February	26.3	23.5	22.1	20.5	6.8
March	39.6	33.5	31.7	28.5	7.7
April	44.0	64.8	61.4	17.1	16.4
May	42.7	98.2	90.3	44.5	30.8
June	40.7	102.7	87.5	54.4	29.7
July	50.0	112.4	100.0	70.2	49.4
August	63.5	114.7	107.5	79.7	62.4
September	53.3	106.1	95.6	55.4	44.4
October	42.1	75.5	73.7	24.6	25.9
November	32.3	15.5	23.7	34.7	9.7
December	27.5	17.3	19.4	21.8	4.3

Source: National Statistical Service at Greece

Table 7.1.6
Hotel Occupancy by Category and Tourist Area

Tourist Areas	A A		A		B		C		D & E		Total	
	Foreigners	Total	Foreigners	Total	Foreigners	Total	Foreigners	Total	Foreigners	Total	Foreigners	Total
Total	53.9	59.0	70.5	77.1	42.4	58.2	27.4	45.6	11.1	28.3	39.1	50.1
Athens	48.6	51.5	57.2	62.9	49.1	61.9	26.9	41.9	10.2	29.0	8.1	25.2
Athens - North Suburbs	6.1	18.3	21.0	38.7	2.5	16.0	6.1	24.1	1.2	20.3	38.1	43.5
Coasts of Attica	33.9	41.2	63.6	66.7	38.3	42.9	25.5	32.4	7.4	17.3	21.5	37.3
Kamena Vourla-Malessina	-	-	21.7	41.2	41.7	54.3	1.3	22.5	0.7	11.1	36.6	47.8
Eratini - Delfi	-	-	48.1	60.5	36.3	50.2	30.4	37.0	17.8	23.6	44.5	53.6
Eretria - Aliveri	-	-	-	-	48.1	56.6	38.0	44.0	0.1	21.5	21.3	39.3
Kilini - Gargaliani	-	-	47.7	55.6	-	-	6.8	30.6	3.4	27.4	12.9	39.1
Pylos - Messini	-	-	-	-	19.1	53.9	11.0	38.4	8.3	21.6	22.7	40.2
Corinth - Patras	-	-	40.6	49.9	27.3	43.3	14.1	38.3	6.1	25.1	41.9	51.6
Ermionis Area	-	-	52.8	59.8	39.5	50.0	13.4	29.3	1.8	19.5	27.6	41.1
Methana - Poros - Galatas	-	-	30.8	45.6	43.2	54.3	13.5	27.8	9.1	28.1	19.0	31.6
Makrigialos - Platamon	-	-	-	-	21.7	30.0	18.3	32.8	16.2	32.1	18.5	50.3
Salonica - Agia Trias	20.2	36.1	21.5	49.6	23.9	56.0	14.4	51.3	11.2	42.0	49.2	62.7
Moudania - Ierissos	30.3	51.0	65.5	75.5	43.6	58.8	28.5	44.8	7.4	19.4	17.6	42.6
Kavala - Thassos	-	-	28.4	34.3	19.0	47.0	14.0	47.9	11.4	28.8	5.9	31.6
Pilio	-	-	-	-	11.9	52.6	2.5	22.0	3.6	19.4	50.4	60.6
Sporades	66.9	77.1	74.8	80.7	60.0	69.6	30.8	44.2	22.6	30.7	67.4	74.6
Corfu	63.6	70.5	76.8	80.8	70.7	78.1	57.9	68.1	27.9	35.1	26.1	44.3
Ionian Islands	-	-	53.5	62.7	29.0	49.1	21.7	40.3	3.2	20.7	16.3	32.7
Epirus coasts	-	-	-	-	27.2	43.1	6.8	25.4	7.4	22.6	72.6	79.4
North Crete	82.0	84.0	84.0	89.3	79.3	85.6	60.1	72.0	24.7	33.9	53.5	60.9
South Crete	-	-	90.6	92.7	75.1	84.6	18.6	38.6	9.2	14.0	80.6	88.7
Rest of Crete	95.0	99.3	106.2	108.4	85.7	86.4	61.4	64.2	19.2	21.3	78.8	84.8
Rhodes	71.9	76.2	85.8	90.0	66.0	80.3	80.1	85.6	45.2	49.7	74.3	77.9
Kos	-	-	81.7	85.3	69.5	72.7	73.2	76.6	30.9	39.8	18.4	26.7
Rest of Dodecanese	-	-	75.9	85.6	25.0	36.1	21.7	28.7	7.5	17.0	31.8	42.7
Cyclades	-	-	58.3	63.5	40.4	52.8	28.3	40.4	25.5	34.4	29.5	42.1
Aegean Islands	70.4	80.9	-	-	25.2	41.7	36.8	45.0	10.8	24.8	12.4	37.3
Rest of Greece	30.4	45.7	36.2	52.4	20.4	49.5	9.2	35.3	4.9	26.2	40.6	54.5

Source: GNTO

Financial Condition

Hotels in Greece are significantly affected with seasonal fluctuation of tourist arrivals. Most of hotels in summer resorts operate less than seven months only. This is the most critical factor which affect the financial condition of the operation together with high interest loan in Greece (18.5% as of 1988). Even large hotels in Athens seem facing financial difficulties, as shown in Table 7.1.8.

Table 7.1.8
Financial Conditions of Selected Major Hotels

	Greece 1/			Japan 2/	
	1985	1986	1987	1985	1986
Net Sales	100.0	100.0	100.0	100.0	100.0
Cost of Goods	82.2	94.1	80.8		
Gross Margin	17.8	5.9	19.2	81.8	83.2
General & Administration Cost	10.5	10.8	9.7		
Depreciation	4.8	4.6	6.3	5.8	6.1
Operating Margin & Losses	2.5	-9.5	3.1	12.4	10.7
Non Operation Income & Expenses	0.0	-1.0	0.4	0.2	0.8
Profit before Interest & Income Tax	2.5	-10.6	3.5	12.6	11.5
Interest	3.7	25.6	19.1	1.9	1.4
Profit before Income Tax	-1.1	-36.2	-15.6	10.7	10.1

Source: GNTO
1/ Average of G.B, Olympic and Intercontinental
2/ Average of five representative urban hotels

GNTO Hotels

In line with the Government tourism policy, 26 Xenia hotels have been constructed by GNTO mainly for Greek people. High class hotels such as Xenia Palace in Nauplion have also been constructed to encourage the utilization by foreign tourists. GNTO has developed "Traditional Hotels" by renting the historical buildings owned by private sector, converting them to hotels and managing them. These hotels are well appreciated by certain group of foreign resort vacationers.

c) Other Accommodation Facilities

Camping Sites

There are about 250 camping sites including auto camping sites. At shown in Table 7.1.9, the number of sites and capacities have been gradually increasing. They are mainly located at coastal areas.

Table 7.1.9
No. of Camping Sites and Units

	No. of Sites (a)	Capacity: No. of units(b)	Average size (b)/(a)
1981	206	18,422	89.4
1982	211	18,660	88.4
1983	235	20,715	88.1
1984	233	21,641	92.9
1985	240	22,131	92.2

Source: Tourism Statistics, 1982/83 and 1984/85

Rental Room

The actual situation of rental rooms is not clear. They are mostly operated in islands during the peak season. As they also provide unique and home basis for resorters and generate incomes directly to local operators, more comprehensive information are to be gathered to formulate proper policy measures.

d) Preference of Accommodation by Nationality

Choice of accommodation type is different by nationality of tourist. Table 7.1.10 shows the following characteristics:

- Majority of the tourists of any nationals use hotels. However those from European countries use relatively more supplemental units than those from the countries far from Greece who have different travel purposes from each other.

- The tourists from European countries also choose more economical hotels, while those from America and Asia tend to stay with higher class hotels. This is because the hotel cost shares relatively small percentage in their total travel expenses.

- Choice of accommodations by Japanese tourists are concentrated in the AA, A and B hotels (93% of the total).

Table 7.1.10
Utilization of Accommodations, by Category and by Nationality of Tourist

Nationality	Main Hotel Unit: Hotels AA	A	B	C	D+E	Supplementary Units: Bungalows and Motels	Guest Rooms	Boarding Houses	Furnished Suites	Camping	Summer Resorts	Grand Total
Total	7.6	25.4	23.5	22.9	5.9	2.9	2.1	0.5	2.6	5.1	1.5	100
Greek	2.7	8.7	25.3	36.6	14.3	1.7	2.8	1.2	0.7	5.9	0.2	100
Greek (Foreign Nationals)	3.7	29.9	15.2	30.3	12.9	0.7	1.7	0.7	1.6	3.1	0.3	100
British	8.1	37.1	23.4	16.3	2.9	3.8	1.7	0.2	3.6	2.7	0.3	100
Austrian	5.0	33.7	22.0	17.0	2.9	5.8	1.6	0.1	0.9	8.9	2.0	100
Belgian-Luxemburger	13.6	31.5	23.4	11.4	2.7	4.8	1.1	0.3	0.7	3.8	6.8	100
French	6.0	27.2	27.8	14.1	3.0	5.3	1.1	0.4	0.7	6.2	8.1	100
German (F.R.)	7.3	38.8	20.6	14.1	2.6	4.3	1.0	0.1	2.2	7.0	1.8	100
Yugoslavian	2.2	4.6	21.1	20.8	14.0	0.5	0.7	0.2	0.7	35.1	0.1	100
Danish	4.4	31.8	27.8	23.1	1.5	0.5	3.3	0.2	5.0	2.3	0.1	100
Swiss	8.1	45.5	15.3	16.3	1.7	7.1	1.3	0.1	0.8	2.1	1.6	100
Italian	10.8	21.4	23.6	14.2	3.2	3.3	1.0	0.2	1.1	12.9	8.3	100
Spanish	9.4	22.8	29.9	24.5	2.7	1.1	1.6	0.2	0.2	6.0	1.3	100
Cyprian	8.3	12.9	31.1	38.6	4.8	0.5	1.1	0.3	1.2	1.0	0.2	100
Norwegian	3.7	28.7	25.2	25.4	1.2	1.1	2.8	0.1	10.2	0.5	0.1	100
Dutch	7.6	29.5	18.5	21.8	2.3	2.8	1.2	0.2	8.2	7.3	0.4	100
Swedish	2.2	25.0	19.1	35.1	3.1	0.3	4.5	0.1	9.9	0.6	0.0	100
Finish	1.6	19.6	24.7	43.1	1.2	1.5	4.7	0.1	3.0	0.4	0.0	100
Other European	4.4	8.8	35.7	29.1	6.1	1.2	1.5	0.4	3.1	9.4	0.3	100
American (USA)	27.2	27.3	23	11.8	2.6	2.1	1.8	0.6	1.7	0.8	1.1	100
Canadian	18.8	23.6	21.2	18.1	6.7	2.1	3.2	1.3	2.1	2.8	1.2	100
Mexican	35.0	27.4	17.9	11.0	3.4	0.9	1.8	0.8	0.3	1.0	0.5	100
Other Latin-American	19.8	20.0	24.4	18.8	9.3	1.0	1.8	0.6	2.4	1.3	0.4	100
Israelite	22.5	26.8	24.7	13.0	3.3	2.2	1.2	0.5	1.8	1.0	2.9	100
Syrian-Lebanese	18.4	19.9	26.8	17.6	6.5	1.0	0.9	0.2	6.9	1.0	0.9	100
Turkish	11.0	29.5	25.3	18.8	7.8	1.4	1.3	0.2	3.4	0.7	0.7	100
Other Asian	30.7	17.7	19.0	16.6	3.2	0.7	1.7	0.4	9.2	0.6	0.3	100
South American	16.0	14.4	39.6	12.4	6.5	2.6	3.6	0.6	0.9	2.3	1.1	100
Egyptian-Sudanese	13.5	24.1	21.9	25.1	9.0	0.6	1.5	0.3	3.0	0.5	0.4	100
Other African	18.0	10.4	19.5	17.8	9.5	0.4	13.4	0.5	8.1	1.1	1.4	100
Australian-New Zealand	9.4	16.7	24.6	21.2	6.5	1.7	4.2	1.7	0.9	12.6	0.6	100
Japanese	38.6	27.5	26.8	3.7	1.4	0.6	0.7	0.2	0.2	0.2	0.1	100

Source: GNTO

2) Convention Facilities

In order to meet the needs of convention activities, conference facilities are fairly well developed in major urban and resort areas. At present, there are nine convention centres; five in Athens, one in Crete, one Thessaloniki, one in Delphi and one in Tinos. Most of the AA and A class hotels in those areas have conference rooms.

Conventions are actively promoted in Greece as in other countries. Newly constructed hotels are normally provided with relatively large conference facilities. Following convention centres are also being planned.

Athens Convention Centre

- Total surface area is about 77,000 sq.m

- The complex contains space for congresses and conferences of all sizes, and a large opera house with seating capacity of 3,500 which can be alternatively used for concerts and conventions.

- The complex includes a film library and an open-air cinema, areas for receptions and ceremonies, restaurants and cafes.

- The complex contains exhibition areas with 15,000 sq.m and number of shops.

Kos Convention Centre

- The centre is located 4 kms from the city of Kos will be constructed by September 1991.

- The centre has a capacity of 2,000 participants with all essential infrastructure, such as refreshment area, small meeting space, offices, etc.

Competitions in convention activities with other countries who also have been undertaking active promotion and development of facilities are becoming fierce.

It is desired in Greece to expand promotion activities with unique programs integrated with various after-convention activities, such as sightseeing of Aegean Sea as ladies program, stay aboard cruise ship, historic tour, etc.

3) Casino

There are, at present, three casinos in operation in Greece, all managed by GNTO, at Mt. Parnes, Rhodes and Corfu, in addition to casinos on cruise ships. The Government has a plan to open seven more casinos.

7.2 *Transport*

7.2.1 International Air Transport

1) International Air Transport between Japan and Europe

a) Present Situation

There are four routes which link Japan and various points of Europe: via south, polar, non-stop, and via Moscow. As summarized in Table 7.2.1 and Table 7.2.2, there are a total of 96 departures/week providing 28,160 seats/week. The following significant changes are seen between 1987 and 1988:

(i) Remarkable increase of the non-stop flights and rapid decline of the southern-route flights. While the former increased by almost 80%, the latter decreased by 60%, which clearly illustrates a shifting trend in favour of the non-stop flights;

(ii) The polar and the Moscow routes show only a moderate increase; and

(iii) The total seating capacity between Japan and Europe has been expanded by nearly 15%.

The overall annual capacity is estimated to be 1.46 million based on the above scheduled flights, while the actual capacity is larger because there are additional flights during summer when the demand is high. According to the statistics by the Japanese Ministry of Justice (Immigration Bureau) and JNTO (Japan National Tourist Organization), the total number of Japanese tourists visiting Europe and that of Europeans visiting Japan in 1987 were approximately 710,000 and 380,000, respectively. Thus actual demand is estimated to have been 1.09 million per year in 1987, for example.

It is, at the same time, estimated by the Japanese travel industry that the current potential traffic demand between Japan and Europe is roughly 1.8 - 2 million per year (80% of which may be attributed to Japanese) and that it is still growing. It is a usual scene that additional seats are promptly taken as soon as the supply increases.

Particularly, the non-stop flights have been popular from the very beginning, due to the following reasons:

(i) The scheduled time (departure from Japan at around midday and arrival in Europe late in the afternoon or early in the evening) is convenient for businessmen; and
(ii) The duration of the journey is shorter, usually connecting Japan with Europe in 12-13 hours.

The load factor on these non-stop flights is quite high, ranging from 80 to 90% on the average. Starting in 1989, all major airlines are planning to introduce the new-generation aircraft, Boeing 747-400, in their services with a longer flying range which will enable a non-stop flight over the north pole. The non-stop flights will no doubt constitute the main core traffic between Japan and Europe in the years to come.

Table 7.2.1
Air Transport Capacity between Japan and Europe

Route	1987 1/ No. of Seats/week	1987 1/ %	1988 2/ No. of Seats/week	1988 2/ %	1988/1987
Via South	3,200	13.0	1,190	4.2	0.37
Polar	12,020	48.9	12,820	45.5	1.07
Non-stop	5,300	21.6	9,500	33.8	1.79
Via Moscow	4,060	16.5	4,650	16.5	1.15

1/ Number of seats in 1987 is based on data from Weekly Travel Journal.
2/ Number of seats in 1988 is a calculated figure based on assumed seating capacity of various aircrafts, and the total number of seats differs slightly from the number of seats actually supplied.

Table 7.2.2
Flight Departures from Japan to Europe

Destination/Route		No. of Departures /week	No. of Seats per week	No. of Seats per year
Destination by City	LONDON:	25	8,240	428,480
	PARIS:	21	6,240	324,480
	FRANKFURT:	15	4,790	249,080
	ROME:	8	2,030	105,560
	AMSTERDAM:	7	2,040	106,080
	COPENHAGEN:	6	1,430	74,360
	MADRID:	4	1,040	54,080
	BRUSSELS:	3	600	31,200
	ATHENS:	2	500	26,000
	HELSINKI:	2	500	26,000
	ZURICH:	2	500	26,000
	GENEVA:	1	250	13,000
	Total	96	28,160	1,464,320
Route	Polar	43	12,820	666,640
	Non-Stop	28	9,500	494,000
	Via Moscow	20	4,650	241,800
	South	5	1,190	61,880

On the other hand, the southern route has deteriorated considerably during the past few years. Now that KLM, Lufthansa, Swissair, and Iberia all withdrew from this route and switched to either the polar or the non-stop route, only Alitalia and Japan Air Lines remain to serve this route to Europe. It is believed that the following factors prompted the withdrawal of other airlines from this route:

- Lengthy duration of travel, often with so many stopovers;
- High operational cost to airlines;
- Unstable political conditions en route as a result of repeated conflicts and acts of terrorism; and
- Consequential diminishing of passenger movement in connection with oil and plant business and of general demand.

General characteristics of each route pattern are further outlined as follows:

Polar Route

The polar flight departs Japan in the evening and arrives at the European destination early next morning. The duration of journey is usually 16 to 18 hours. The night flight saves one night's hotel accommodation, and early morning arrival enables immediate activities such as sightseeing. For this reason, the polar flight is popularly used to accommodate group tourists.

The polar flight is also favoured by extremely busy businessmen who must depart after an ordinary day's work in the office and begin their work immediately after they arrive.

Starting from November 1988, Sabena Belgian World Airlines is setting a new trend to the existing pattern by inaugurating a polar flight which departs Tokyo in the morning and arrives in Belgium on the same day early in the evening.

Non-stop Route

The non-stop flight departs Japan around midday and arrives in Europe on the same day late in the afternoon or early in the evening. The flight has no stopover and requires only 12 to 13 hours which is the shortest. The schedule enables travellers to have one night's rest. This route is very popular among businessmen and some group tourists who do not mind paying for an extra night's hotel accommodation.

Moscow Route

The Moscow flight departs Japan at around midday and arrives Europe on the same day in late afternoon or early evening. The flight time is normally 13 to 15 hours. Apart from a brief stopover in Moscow, the conditions are almost the same as the non-stop flight.

At present, as the aircraft capability necessitates airlines to operate their non-stop flights over USSR, the airlines must in turn operate (on the ground of the aviation treaty with USSR) some flights by way of Moscow. When the new Boeing 747-400 comes into service, it will enable a non-stop voyage from Japan to Europe over the north pole, without flying over USSR.

Before non-stop flights became available, the Moscow route was the shortest way between Japan and Europe.

<u>Southern Route</u>

The southern-route flight departs Tokyo in the afternoon or in the evening and arrives Europe early next morning. The flight usually takes longer than 20 hours to reach the final destination.

This route once enjoyed popularity when the oil and the plant business in the Middle and the Near East flourished, although the profitability was not so high. Repeated political conflicts and acts of terrorism in recent years also had a negative effect, and the demand for the route gradually declined.

b) Future Outlook

The recent air talks between Japan and the United Kingdom (held in August, 1988) have agreed on further increasing the supply, so that the total maximum capacity in 1989 between the two countries will be 34 flights per week.

As a result, All Nippon Airways will begin operation of 3-5 flights per week to London, starting from July, 1989; and alternately, Virgin Atlantic Airways will operate 4 flights to Japan from May, 1989.

Another route, Tokyo/Moscow/Vienna v.v. will be opened in in summer of 1989. The frequency is presently planned to be 2 flights a week during summer and 1 flight during winter. It will be a "troika" joint operation among Austrian Airlines, Aeroflot and one Japanese airline.

Turkish Airlines also expresses the intention to open an air route between Japan and Turkey after summer, 1989. There are a number of other airlines intending to operate a flight to Japan, but the details are unknown yet.

2) International Air Traffic Between Japan and Greece

a) The Present Conditions and the Future Outlook

This section is to take a closer look at the situation of the southern route in connection with the tourism traffic from Japan. To simplify the matter, we may say that there are two means or routes of access to Greece from Japan: one possibility is to utilize the northern (polar, non-stop or Moscow) route for some European destination and thereafter change onto a connection flight for Greece, and the other is to fly via the southern (or the "Silk Road") route to Greece - with or without a transfer of flights en route.

Southern Route by JAL

The Tokyo-Athens route was originally opened in 1972, subsequent to the conclusion of the air agreement between the two countries, as one of the oldest air routes connecting Japan with Europe. It has ever since contributed substantially to the tourism and other exchange between Japan and Greece.

Currently, Japan Air Lines is the only airline to remain on the southern route serving directly between Japan and Greece without a transfer. JAL operates a DC-10 over this route twice a week, with a seating capacity of approximately 26,000 seats a year (See Appendix 3.A). En route to Athens, JAL is also serving four to five other countries with these flights. For a through passenger from Tokyo to Athens, the total flight time adds up to about 24 hours. The average percentage of through passengers (Tokyo/Athens) on these flights remains low, at slightly over 20% of the seats provided.

Although it cannot be denied that the traffic demand for this route is stagnant, the route today still provides the least expensive link between Japan and Europe without the inconvenience of changing flights. Moreover, the route has played a significant role in the history of Greco-Japanese relationship.

Southern Routes with Connections

On the other hand, there are other flights connecting Japan and Greece involving a transfer of flights. Singapore and Bangkok appear to be especially noteworthy points of transfer, as there are non-stop flights in both directions (connecting Tokyo and Athens), but the demand over these sectors is always on the high side (Details of the flights are listed in Appendix 3.B).

Although there is a total seating capacity of approximately 250,000 a year, there is hardly any room for Japanese group tourists between Athens and either Singapore or Bangkok, because there is a constant heavy traffic of Greek immigrants and expatriates between Greece and Australia by way of these cities.

Olympic Airways, the state-owned national airline of Greece, has been operating a B-747 twice a week between Greece and Australia via Singapore. In addition to these, Olympic Airways has inaugurated since November 1988 a new flight once a week, connecting Greece with Australia by way of Bangkok.

Issues on the Southern Route

It is significant to note that the Greek Government, on the basis of the bilateral air agreement between Japan and Greece, has recently notified JAL of the termination of JAL's traffic right between Bangkok and Athens. It means that Japan Air Lines can no longer accommodate passengers whose journey originates and terminates solely between Bangkok and Athens. Although JAL is in no way affected by this measure to carry passengers between Tokyo and Athens, should this termination of traffic right come into effect, it is obvious that JAL will incur a heavy loss of revenue by not being able to carry passengers over the Bangkok-Athens sector. In that event, even the possibility of JAL's eventual suspension of operating these flights could not be denied.

It is said that in the past the Greek Government had requested JAL to operate a B-747 non-stop between Tokyo and Athens. The present level of Japan - Greece demand and the lack of steady business traffic over this sector are considered to be the main reasons which withheld JAL from going into such an operation. One major issue which is always raised in association with the tourism promotion of Greece has been the shortage of supplied seats and of direct flights between Tokyo and Athens. If this is the case, then it is more important and more natural to try to preserve the existing facilities, rather than to impose restrictions on them, thereby risking the danger of further reduction of the already limited supply. Restrictions of carriage will, if anything, only bring about backward and negative effects from the viewpoint of promoting tourism for Greece.

In this context, it is desirable that Olympic Airways open a new route into and out of Japan at an early stage, as this would not only increase the supply of seating capacity but also provide another channel of promoting Greece in Japan. However, interviews with various parties concerned have so far revealed that this is not likely to happen within the foreseeable future. The primary negative factors are described as follows:

(i) Presently, there are about 300 Greeks residing in Japan, and this is not a sufficient number to sustain and create demand for Olympic Airways.

(ii) Olympic Airways is suffering from chronic shortage of aircrafts as shown in Table 7.2.3, and for this reason Olympic Airways is obliged to operate larger types of aircrafts, capable of long-range operation, on high-demand routes with priority.

Table 7.2.3
Olympic Airways' Passenger Fleet
as of October, 1986

A/C MFR & TYPE	NBR OF A/C	Capacity
BOEING 747-200 SERIES	4	432-447
AIRBUS A300	8	262
BOEING 707-300 SERIES	5	155-183
BOEING 727-200 SERIES	6	146
BOEING 737-200 SERIES	11	101-123
S/TOTAL	34	
(OLYMPIC AVIATION FLEET)		
SHORTS SD3	6	30
DORNIER	7	19
SHORTS SC7	2	18
PIPER	3	3-5
CESSNA	3	1
AEROSPATIALE (HELICOPTER)	2	5
S/TOTAL	23	
G/TOTAL	57	

(iii) Although Olympic Airways is allegedly aiming to modernize its fleet and further expand its network, Olympic's present financial situation (See Appendix 3.D) is such that it does not allow substantial lump expenditure for a bulk purchase of aircrafts - whether new or used.

In fact, as of the end of 1986, Olympic Airways sustained a heavy annual loss of nearly 19.9 billion drachmas (which is almost 78% of its capital), and the accumulated loss amounted to as much as 65 billion drachmas.

Long-term loans have been increasing year by year to compensate for the loss, and interests on these loans have been piling up, only to worsen the financial conditions.

Under such circumstances, it is only natural that Olympic's aircraft acquisition is limited to lease-purchase agreements and sporadic purchases of used aircrafts.

(iv) Olympic Airways' immediate goal is to upgrade its intra-European network by operating Airbus A300s on all of its service routes instead of the conventional B-707s and B727s. In the meantime, B-707s and B-727s are gradually becoming antiquated and will shortly be in need of replacement by newer type(s) of aircrafts.

Obviously, Olympic Airways is in serious financial difficulties, and its fleet of aircrafts are in need of replacement and major face-lifting. In the light of the essential role Olympic Airways has to play in the tourism promotion of Greece, measures and efforts are urgently called for to improve its financial conditions.

b) An Example of Success

It may be of some interest to refer to a successful example of IBERIA, the national airline of Spain. Spain was once considered to be a very "distant" country from Japan, and the number of Japanese tourists visiting Spain in 1980 was less than 90,000.

IBERIA began its operation to Japan from May 1986, twice a week, using a B-747 passenger/freight mixed version over the route Madrid/Bombay/Tokyo v.v. The initial year was not a very good one, right after the Chernobyl incident in USSR, but Europe slowly recovered and the demand gradually expanded. IBERIA claimed their flight to be the shortest possible way to Spain (then taking about 17 hours). In October 1987, IBERIA changed its route to fly via Anchorage instead of Bombay to respond to the growing demand. In November 1988, they have added a new, third flight to fly Tokyo/Anchorage/Barcelona/Madrid, presumably in preparation for the 1992 Olympic Games in Barcelona.

IBERIA's promotion and publicity campaign, in addition to and in conjunction with the activities of the Spanish National Tourist Organization, have contributed greatly and successfully to further boost the tourism demand in Japan for Spain. In 1987, the growth rate in number of Japanese tourists to Spain showed a magnificent 36.3% (as compared with the average 21.9% of Europe in general), and as a result, the number of Japanese tourists visiting Spain exceeded 130,000 in 1987 which is expected to grow continuously.

IBERIA's average load factor in the initial year of 1986 was a mere 55%; in 1987 it rose to 77%; and in 1988 they hope to attain 84% which is an excellent figure in the airline business. IBERIA's contribution to the seating capacity was less than 30,000 seats a year, but the impetus it has given to the Japanese tourism demand is said to be far greater than the number of seats it has supplied to the Japanese market.

c) Air Transport Between Greece and European Gateway Countries

The result of the market survey indicates that the majority of Japanese tourists prefer to visit not one but several countries - as long as their time and resources permit - once they have purchased an expensive tour to come all the way from Japan to Europe.

In utilizing the northern route, what can become a major problem is the matter of connection traffic between other European countries and Greece. Flight connection time in each city does not present a very big problem for the time being. However, if Greece indeed were the sole destination in Europe, the flight connection time at intermediate ports of call would be an important factor requiring careful attention, and efforts should certainly be made to make the connections as short and as easy as possible for the benefit of tourists heading for their final destination. Therefore, the key factors to improve the utilization of the northern route to Greece appear to be the frequency and the capacity of such connection flights.

The current level of air traffic between Greece and some gateway countries is shown in Table 7.2.4.

Table 7.2.4
Estimated Tourist Arrivals on Charter and Scheduled Flights by Nationality (1988)

Country of Origin	Grand Total Arrivals	Total Arrivals by Air	Charter Arrivals	Arrivals by Scheduled Flts	Scheduled Flt Arrivals/week
United Kingdom	1,790,000	1,645,010	1,542,980	102,030	1,962
France	469,000	370,041	272,489	97,552	1,876
W. Germany	1,382,000	942,524	751,808	191,716	3,687
Italy	544,000	193,120	43,520	149,600	2,877
Netherlands	389,000	343,487	267,243	76,244	1,466
Austria	311,000	200,284	158,610	41,674	801

Notes: 1. Number of grand total arrivals is the estimated figure by GNTO.
2. The rest of the figures are estimated on the basis of tourist arrivals in 1985.

There are considerable number of flights available along the above routes (See Appendix 3.C). However, there is no information on actual load factors of the relevant airlines except for those of Olympic Airways, which are as follows:

London/Athens v.v.	: 74.1%	Amsterdam/Athens v.v.	: 63.0%
Paris/Athens v.v.	: 64.6%	Rome/Athens v.v.	: 61.9%
Frankfurt/Athens v.v.	: 67.0%	Vienna/Athens v.v.	: 58.7%

The load factors of other airlines of the above routes are believed to be more or less on the similar level as those of Olympic Airways. Judging from the current level of load factors, it is considered that the supply is generally larger than the demand, but the margin is not so large on some routes. At any rate, in order to ensure smooth traffic flow into Greece, further improvement of general intra-European air network is deemed necessary.

There are numerous charter flights operating from various European cities to Greece, and they may seem like a nice supplementary means of transport which can be utilized by Japanese tourists as well. Although such charter flights are certainly inexpensive and convenient means of travel for the Japanese living in Europe, for various reasons they do not offer a practical solution to travellers originating from Japan. The most significant of these reasons is the economic one: all of these charter airlines have their own independent (and competitive) fare systems, and none of them have common means of revenue proration with the regular scheduled airlines. For this reason, charter flights cannot be included in the normal group tour packages. Technically, it is possible to combine charter flights with ordinary tour package itineraries, but then the charter fares will be added up to the normal tour price (which already includes passage to Greece) as extra, making it very difficult for travel agents to offer attractive and competitive tour packages to prospective travellers.

While the charter business keeps on growing in Europe, it is beginning to cause a serious problem of over-congestion at most of the airports, especially during the summer season. For regular airlines, increasing flight frequency is becoming more and more difficult.

d) Conclusion

Needless to say, each route has its own merits and demerits. The northern route inevitably involves a transfer of flights but can offer a great number and variety of flights. The southern route is more time-consuming and offers only a limited capacity of seats, although it can provide a direct and less expensive access to Greece without a change of flights. Until recently, the group air fare system between Tokyo and Athens was such that it would be more expensive to travel to Athens - than to other major European cities - via the polar route. This was clearly a disadvantage for Greece, making Greece appear to be an even more distant destination than it really is. However, the situation changed when Greece joined ECF (Europe Common Fare) in October, 1987, bringing the group air fare using the polar service down to the same level as any other major European cities. Incidentally, it is worth mentioning that Japan Air Lines played a leading role at IATA tariff coordinating conferences in effecting this change. The change virtually had a similar effect as expanding the supply of seating capacity as far as Greece was concerned.

As we look at the present-day tourism trend, we should probably place an emphasis on exploitation of the northern route air network; but, even so, the southern route must not be forgotten. Continued efforts are required to preserve and to improve this route.

7.2.2 Domestic Air Transport

1) Domestic Air Transport

Routes

Domestic air routes in Greece are served by the national airline, Olympic Airways, and its subsidiary company, Olympic Aviation, which operates light aircrafts and helicopters. Larger types of aircrafts such as Boeing 707, 727, 737 and Airbus A300 - with a capacity of over 100 seats - serve the main trunk routes, while smaller aircrafts like Shorts and Dornier - with a capacity of less than 30 seats - operate on other routes.

In 1987, Olympic Airways transported 4,475,002 passengers on its domestic services.

Olympic Airways' domestic network (See Figure 7.2.1) covers the following 33 cities and islands, as of July 1988:

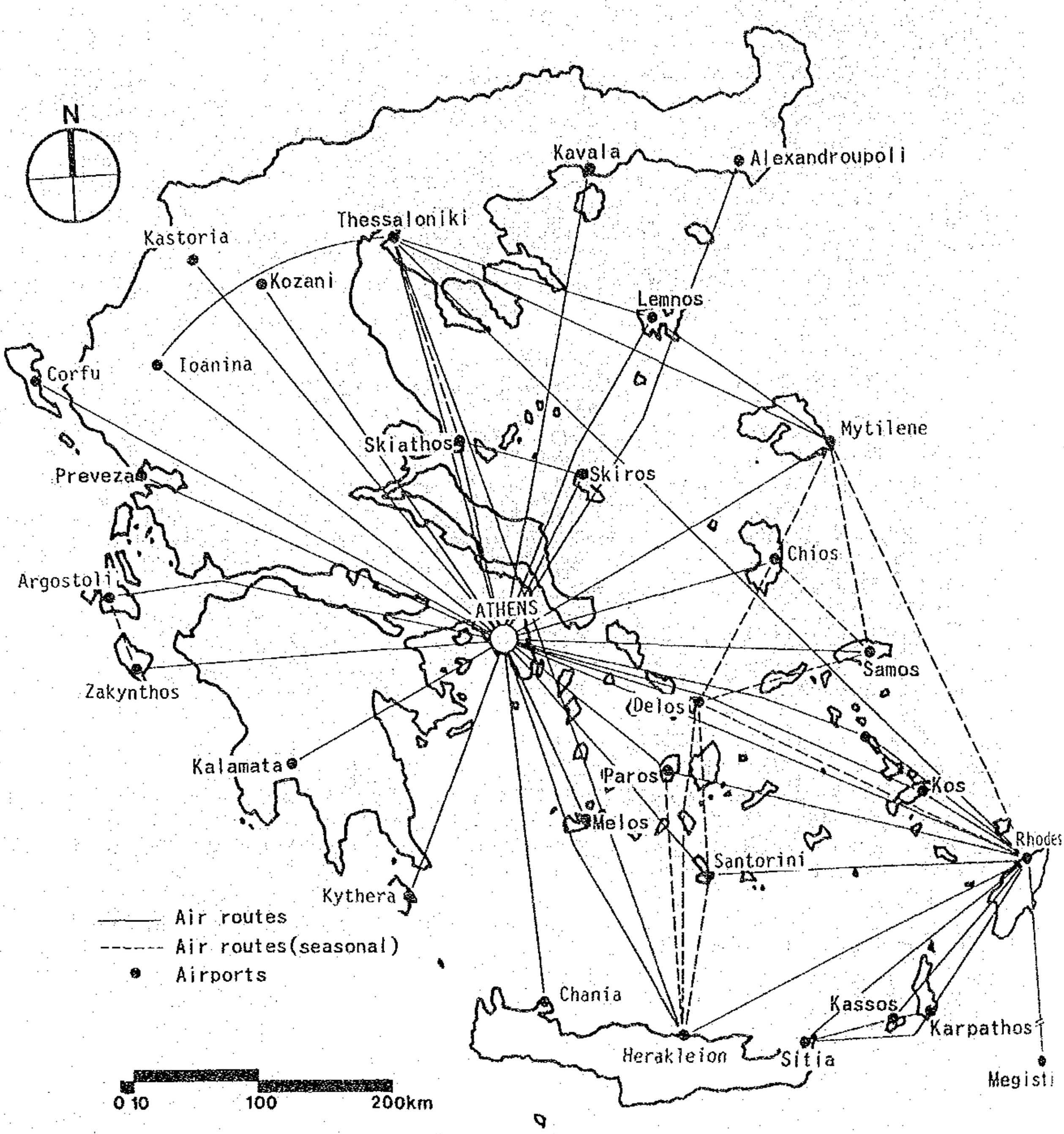
- Alexandroupoli	- Cephallonia	- Paros
- Chania	- Corfu	- Patras
- Chios	- Kos	- Preveza
- Ioania	- Kozani	- Rhodes
- Herakleion	- Kythera	- Samos
- Kalamata	- Larissa	- Sitia
- Karpathos	- Leros	- Skiathos
- Kassos	- Lemnos	- Skyros
- Kastellorizo	- Melos	- Thessaloniki
- Kastoria	- Mykonos	- Santorini (Thera)
- Kavala	- Mytilene	- Zakynthos

Schedule

Current domestic air schedule as of October 1988 is listed in Appendix 3.E for reference. Apart from the flights listed, during the summer season, there are additional inter-island flights available.

Upon request, Olympic Aviation can also operate light aircrafts and helicopters on a charter basis.

Figure 7.2.1
Domestic Air Network



2) Fares

Normal domestic air fares as of October 1988 are shown in Appendix 3.F. For special reduced fare, Olympic Airways offers night-flight fare and APEX (Advanced Purchase Excursion) fare on some routes.

The current level of Greek domestic air fare is not high, as compared with domestic air fares in other countries. (See Table 7.2.5 and Table 7.2.6.)

Table 7.2.5
Distance, Flight Time and Fare from Athens to Major Domestic Destinations as of October 1988

Destination	Distance (km)	Flight Time (min.)	One Way Fare (DRS)	Unit Fare (¥/km)
Thessaloniki	298	50	7,000	23.49
Corfu	379	50	8,200	21.64
Rhodes	422	55	9,200	21.80
Herakleion	312	50	7,300	23.40

Notes: 1. For distance, IATA standard non-stop sector mileage applied.
2. For currency conversion rate, DRS 1=¥ 1 is applied.

Table 7.2.6
Comparison of Unit Domestic Air Fare as of May 1987

Country	Sector	Distance (km)	Oneway Fare	Unit Fare (¥/km)
Japan	Tokyo/Osaka	431	JYE14,183	32.90
USA	San Francisco/Los Angeles	547	USD100.93	26.16
	Boston/Philadelphia	451	129.63	40.34
	St. Louis/Chicago	414	175.93	60.24
United Kingdom	London/Manchester	264	UKL 57.00	51.28
	London/Liverpoor	286	54.00	44.84
Germany	Hamburg/Munich	624	DMK349.00	44.20
	Koln/Hamburg	365	240.00	51.96
	Dusseldorf/Munich	499	305.00	48.30
France	Paris/Lyon	397	FFR593.00	35.67
	Paris/Mulhouse	405	698.00	41.16
Italy	Rome/Venice	412	LIT135.500	36.97
	Rome/Palermo	407	135.500	37.42
Australia	Melbourne/Canberra	470	AUD126.00	27.26
	Sydney/Canberra	237	90.00	38.61

Note: For conversion rate, USD 1=141.75, UKL 1=¥237.50, DMK 1=¥79.02, FFR 1=¥23.88, LIT 100=¥11.24 and AUD 1=¥101.67 have been applied.

Source: Japan Air Lines

3) Airport

Ellenikon Airport

Ellenikon Airport, located in the south-east of Athens, is the main gateway to Greece. It has two terminals: an international terminal in the east and an Olympic Airways terminal in the west. The east terminal serves 51 foreign airlines operating in and out of Athens and a large number of charter companies which bring tourists to Greece, mainly from central and northern Europe. The west terminal serves the national airline, Olympic Airways, and its subsidiary company, Olympic Aviation.

In 1986, there were a total of 110,199 takeoffs and landings, carrying a total of 9,599,651 passengers. Out of these, 60,663 takeoffs and landings were those of international flights. About 74.5% of departures took place between the months of May and September. In the months of July and August, there were, on the average, 364 international takeoffs and landings per day.

Ellenikon Airport has only one runway, 3,500m long and 60m wide. (See Appendix 3.G). Although its parallel taxiway (3,150m long and 45m wide) could be used as a reserve runway in exceptional cases, it is not normally used. Since the present single runway can take only 30 to 35 flights per hour, Ellenikon is said to be operating at the verge of saturation during the peak season of summer.

Recently, it has gone through a series of improvement programmes, including modernization of air traffic control (ATC) system, extension of fueling system, expansion of the east terminal building and renovation of the west terminal building. As a result, the east terminal is now capable of handling about 2,000 departing passengers and about 2,300 arriving passengers per hour. The Greek Civil Aviation Authority (CAA) plans to carry out further development and improvement works on the airport so as to push off the saturation date as late as possible; but the construction of a new runway at Ellenikon has been judged by the government as requiring too much time and money.

In order to alleviate the worsening congestion at Ellenikon Airport, construction of Venizelos Airport in the Sparta area is underway. Preliminary earthworks have already been started. The construction of the first runway, terminal buildings and control tower of Venizelos Airport will begin in early 1989 and is scheduled for completion in 1992. The new airport will be initially used for charter flights, with the prospect of handling regular scheduled flights at some future date. The new airport's runway will have a capacity of 40 flights per hour and the terminal will be able to handle up to 3,000,000 passengers per year. In its final phase, the airport will have two runways and four terminals.

Other Airports

Out of Greece's remaining 34 civil airports, five handle scheduled international flights: Thessaloniki, Corfu (Kerkyra), Rhodes, Herakleion and Ioania. In terms of passenger traffic, the second largest airport is Herakleion with 2,418,720 passengers (departures and arrivals) in 1986. Third comes Rhodes Airport with 2,018,639 passengers, followed by Thessaloniki with 1,546,433 and Corfu with 1,472,775 passengers.

Charter flights from abroad also land at many Greek airports. The total arrivals of charter flight passengers in 1987 were said to be 4,070,305.

Heavy seasonal fluctuation and a large percentage of charter traffic are the prominently characteristic features common to major Greek airports.

4) Conclusion

As far as the Japanese group tourists - with a limited duration of stay in any one country - are concerned, it seems like a natural conclusion that their transfer from one point to another must greatly depend upon air traffic. Although it is interesting to note that our questionnaire survey with Japanese tourists indicates that the cruise ship is the most preferred means of transport to visit the Aegean Islands (80.9% preference rate), while the airplane and hydro-airplane are listed with low priority (5.2% when combined).

There being so many islands and beaches in Greece, it would be an interesting idea to operate hydro-airplanes, but presently there is no such aircraft in the Olympic Aviation fleet. In any case, when such factors as time and money are considered, we may say that airplanes are a practical, if not preferred, mode of transportation within Greece. Most of the domestic destinations in Greece fall within a 1-hour flight radius from Athens, and Greek domestic air fares are kept at a low level.

Indeed, Greece has a very large and extensive domestic air network when compared to her size, which literally serves as a vital basic infrastructure for her people in terms of transport and communications.

For this reason, in the public interest, Greek domestic air fare is maintained at a very low level, which is probably one of the lowest in the western world. This low air fare contributes greatly to the remarkably high load factor (nearly 85% overall average, according to Olympic Airways) of Greek domestic flights.

Despite the very high load factor, high operational cost to maintain the extensive network and limited revenue, when combined, can produce very little or no profit at all. In fact, according to one Olympic Airways official, more than 2/3 of Olympic Airways' deficits may be attributed to its domestic sector.

Such being the case, although domestic air travel in Greece is both convenient and advantageous in terms of time and money, it cannot be regarded as an ideal means of domestic transport for Japanese group tourists in the sense that it would be physically difficult to even book a specific flight.

For inland destinations (which are relatively close to Athens) there are alternative transport means of buses and trains, and for nearby islands hydrofoils can be convenient, but for remote islands such as Crete and Rhodes aircrafts are just about the only practical means of transport for Japanese tourists who have limitations of time. Therefore, so long as Japanese tourists cannot utilize these domestic flights freely, Greek domestic destinations - no matter how attractive - will have to remain relatively unexposed and, consequently, unpopular. As a result, Japanese tourists are obliged to adhere to the conventional tour itinerary allowing only 1 day in Athens and another day on the Saronic cruising, without exploring or experiencing the better part of Greek tourism.

Obviously, Olympic Airways has by no means neglected the importance of its domestic sector. It has been trying to increase the domestic fares in order to improve its revenue, but, according to Olympic Airways, approval has been granted for only a minor increase which is not even enough to make up for Greece's high inflation rate.

Under the circumstances, increased flights on Greek domestic services could be synonym to increased deficits. Higher load factor, as far as Greek domestic air network is concerned, does not necessarily mean higher profit.

Solutions must be sought, and efforts must be made to increase the flight frequency and/or capacity without worsening the Olympic Airways' financial conditions.

7.2.3 Sea Transport

1) General

Greece is well-known throughout the world for her merchant fleet and for her tradition of shipping. Needless to say, for a country where 15% of its land consists of islands inhabited by 14% of the country's total population, sea transport is of great importance. Figure 7.2.2 illustrates the routes operated by Greek shipping lines.

There are regular, scheduled steamship services and cruises connecting Greece with Egypt, Cyprus, Israel, Italy, Syria, Turkey, USSR and Yugoslavia, but they are seldom ever utilized by the majority of Japanese tourists.

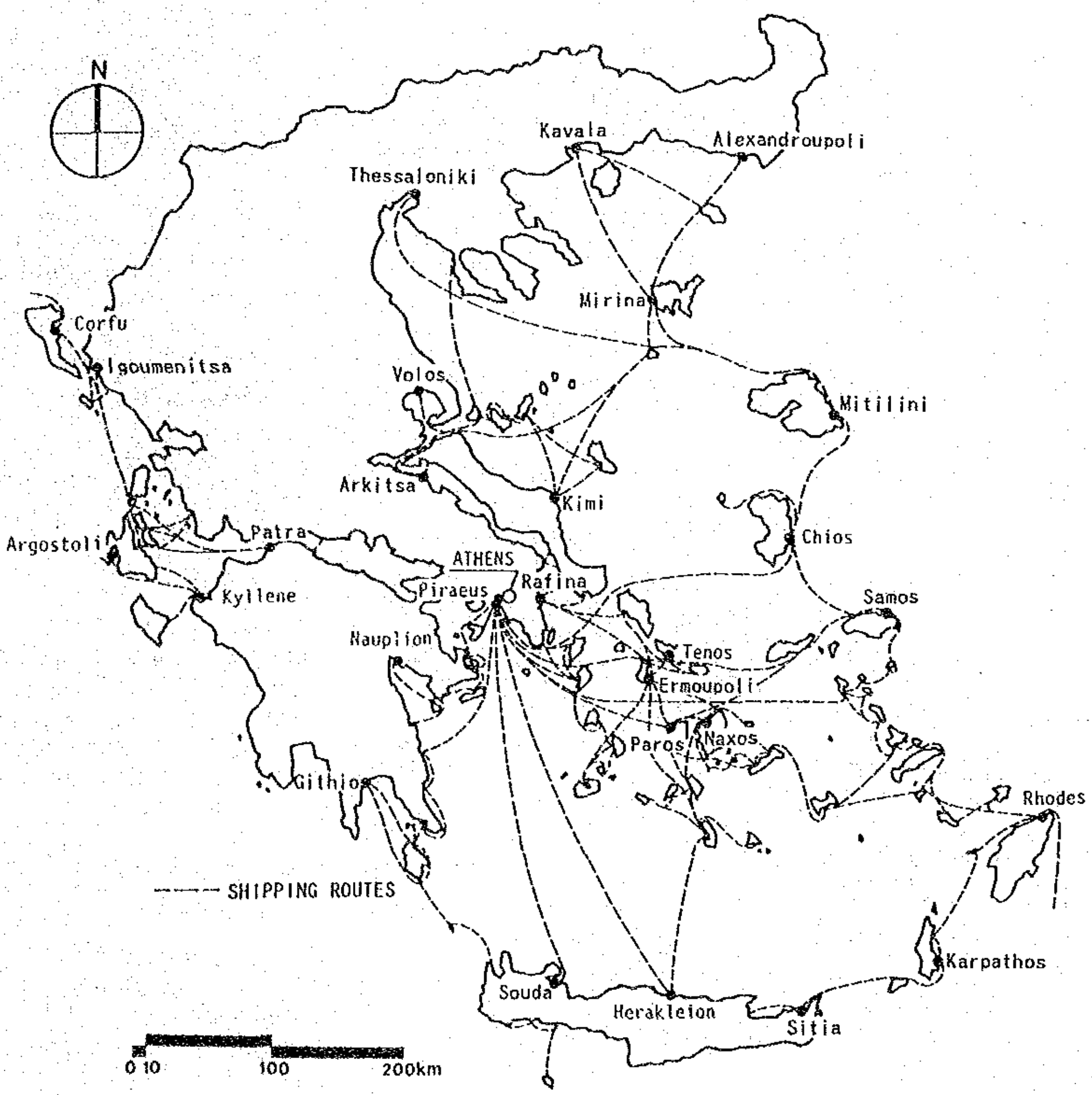
The hub of the coastal network is the port of Piraeus. Piraeus is linked to the islands of the Saronic Gulf and the Aegean by a large fleet of passenger and car ferries plus 20 hydrofoils (flying dolphins) which, with a speed of 36 knots, draw Athens closer to the islands and the east coast of the Peloponnese. In recent years, many direct inter-island lines have been created which serve tourist needs primarily. The Ionian Islands are linked by regular sailings to ports in western Greece. There are also local ferry boat lines served by open-type ships (often basic links to supplement the road network such as the Rion - Antirrion line) which connects the Peloponnese, and indirectly Attica, with northeastern Greece. As of 1985, there are about 340 passenger ships , including ferry boats, registered in Greece, with a gross tonnage of 616,000t.

In 1985, 685,831 foreigners (excluding the number of arrivals of cruise passengers en route to their voyage) entered Greece by way of sea, which accounts for 10.4% of the total arrivals. Including the cruise passengers, 1,151,266 foreigners visited Greece by sea transport. The coastal passenger ships and ferries carried a total of 24,584,388 passengers and 6,870,527 vehicles in 1985.

Some of the domestic ship schedules and fares, including those of flying dolphins, are listed in Appendix 3.H for reference.

Figure 7.2.2

Shipping Routes



2) Cruises

Cruises in Greece constitute a major part of tourist attraction. More than 30 Greek ships are said to be currently in operation, sailing in the Greek seas. Although some of these ships are old, all have been either specially built or adapted for cruising and offer a variety of accommodation, ranging from deluxe suites to economy cabins. The only difference in price is usually attributed to different grades of accommodation and, unlike many of the great ocean liners, all amenities are equally available to all passengers.

The accommodations on Greek cruise ships are divided into a number of cabin categories, from deluxe suites on the upper decks to economy inside cabins on the lowest decks. Rates are quoted in US$ per person and vary depending on the position in the ship, the degree of comfort and the number of persons sharing a cabin. Rates also vary according to the duration of the voyage, the season and the shipping company.

There are a variety of itineraries to choose from. The duration of the cruise ranges from 1 day to 21 days, but the 1-day to 7-day itineraries seem to be the most popular choice. Typical itineraries and schedules of such cruises are shown in Table 7.2.7. Except for the 1-day cruise, which is available all year round, most of the cruise sailings are seasonal and are generally available from March through November. During winter months, there are fewer passengers joining the cruise in proportion to the number of visitors to Greece. Cruising conditions tend to be less favourable with less sunshine, occasional cold rain and rough sea. As a result, cruising in winter may not be always enjoyable. If, however, luck favours with a good weather, the cruise can be as pleasant as it should be. On such occasions, the cruise may be fully appreciated by Japanese tourists who are big cruise patrons during this season.

Many ancient and medieval sites such as those at Knossos, Lindos, Aigina, and Delos can all be easily visited by shore excursions from the ports of call.

3) General Impressions on the Aegean Cruise

Although the Aegean Sea cruising is such an important and popular feature of Greek tourism to the Japanese (See 6-19), most of the Japanese tourists visiting Greece have only enough time to experience one-day cruise (See 6-18). And their impressions of the cruise are not necessarily favourable (See 6-24).

Common complaints often raised by the Japanese may be summarized as follows:

- Visiting as many as 3 islands within one day seems a bit too much, and stay at a port of call is inevitably too short.
- The lunch served on board is not very agreeable.
- Entertainments provided on board are not attractive enough.

Table 7.2.7 List of Cruises

Dep.Day	Duration	Available	Vessel	Itinerary (Departure Time)
DLY	1 Day	Year Round	AEGIAN GLORY CITY OF HYDRA or CITY OF PIRAEUS	P.Phaleron(0830)-Hydra-Poros-Aigina-P.Phaleron
DLY	1 Day	Year Round	HERMES or APOLLO	P.Phaleron(0830)-Aigina-Hydra-Poros-P.Phaleron
DLY	1 Day	JUN-OCT88	GLARAKI	Marina Alimos(0830)-Hydra-Poros-Aigina-Marina Alimos
	10 Days	26APR,10MAY,13SEP	ATALANTE	Piraeus(1300)-Istanbul-Limassol-Ashdod-Alexandria-Katakolon
	9 Days	29MAR,12APR,27SEP	ATALANTE	Herakleion(1300)-Alexandria-Haifa-Limassol-Rhodes-Kusadasi-Patmos-Piraeus
	8 Days	24MAY,07JUN88,11OCT88	ATALANTE	Piraeus(1200)-Istanbul-Yalta-Odessa-Nessebar-Cannakale-Mykonos-Piraeus
MON	14 Days	03/17OCT88	STELLA MARIS	Piraeus(1600)-Hydra-Corinth Canal-Itea-Nauplion-Gythion-Herakleion-Santorini-Kusadasi-Bodrum-Kos-Rhodes-Dikili-Canakkale-Istanbul-Mt.Athos-Thessaloniki-Volos-Delos-Mykonos-Piraeus
MON	14 Days	08/29AUG88	STELLA SOLARIS	Piraeus(1900)-Constanta-Odessa-Yalta-Volos-Piraeus-*Rhodes-Alexandria-Port Said-Ashdod-Samos-Kusadasi-Piraeus*
MON	14 Days	01/22AUG88	STELLA SOLARIS	Piraeus(1900)-Dikili-Istanbul-Kusadasi-Rhodes-Herakleion-Santorini-Delos-Mykonos-Piraeus-Constanta-Odessa-Yalta-Volos-Piraeus
MON	14 Days	25APR-17OCT88 Every other Mon.	STELLA SOLARIS	Piraeus(1900)-Dikili-Istanbul-Kusadasi-Rhodes-Herakleion-Santorini-Delos-Mykonos-Piraeus-Rhodes-Alexandria-Port *Said-Ashdod-Samos-Kusadasi-Piraeus*
MON	7 Days	23MAY-17OCT88	CITY OF MYKONOS	Piraeus(1400)-Port Said-Ashdod-Rhodes-Kusadasi-Mykonos-Piraeus
MON	7 Days	04/11/18APR88	STELLA MARIS	Piraeus(1800)-Dikili-Istanbul-Kusadasi-Rhodes-Herakleion-Santorini-Delos-Mykonos-Piraeus
MON	7 Days	02MAY-17OCT88 Every other Mon.	STELLA SOLARIS	Piraeus(1900)-Rhodes-Alexandria-Port Said-Ashdod-Samos-Kusadasi-Piraeus
MON	7 Days	25APR-24OCT88 Every other Mon.	STELLA SOLARIS	Piraeus(1900)-Dikili-Istanbul-Kusadasi-Rhodes-Hderakleion-Santorini-Delos-Mykonos-Piraeus
MON	7 Days	08/29AUG88	STELLA SOLARIS	Piraeus(1900)-Constanta-Odessa-Yalta-Volos-Piraeus
MON	7 Days	23MAY-03OCT88	AEGEAN DOLPHIN	Piraeus(2000)-Herakleion-Santorini-Kusadasi-Mykonos-Corinth-Dubrovnik-Venice-Piraeus
MON	7 Days	23MAY-01OCT88	LA PALMA	Piraeus(2100)-Rhodes-Herakleion-Corfu-Dubrovnik-Venice-Piraeus
MON	4 Days	28MAR-11NOV88	OCEANOS & NEPTUNE	Piraeus(1200)-Mykonos-Santorini-Herakleion-Rhodes-Kusadasi-Patmos-Piraeus
MON	4 Days	28MAR-21NOV88	BETSY ROSS	Piraeus(1230)-Istanbul-Skiathos-Santorini-Herakleion-Piraeus
MON	4 Days	04APR-24OCT88	STELLA OCEANIS	Piraeus(1800)-Hydra-Herakleion-Santorini-Rhodes-Kusadasi-Mykonos-Piraeus
MON	4 Days	18APR-21OCT88	CITY OF RHODOS	Piraeus(1830)-Patmos-Kusadasi-Rhodes-Herakleion-Santorini-Piraeus
MON	3.5 Days	25APR.09/16/23/30MAY, 29AUG.05/12/19/26SEP	STELLA MARIS	Piraeus(1100)-Mykonos-Kusadasi-Patmos-Rhodes-Hydra-Piraeus
MON	3 Days	23MAY-03OCT88	AEGIAN DOLPHIN	Piraeus(2000)-Herakleion-Santorini-Kusadasi-Mykonos-*Corinth (From Corinth shuttle service to Piraeus)*
TUE	4 Days	26APR-25OCT88	VICTORIA	Mykonos(1000)-Naxos-Ios-Santorini-Siphnos-Seriphos-Paros-Mykonos
THU	7 Days	23JUN-01SEP88	ATALANTE	Piraeus(1300)-Ancona-Katakolon-Herakleion-Santorini-Rhodes-Bodrum-Piraeus
THU	3.5 Days	28APR,12/19/26SEP, 01/08/15/22/29OCT	STELLA MARIS	Piraeus(1900)-Patmos-Kusadaki-Rhodes-Santorini-Mykonos-Piraeus
THU	3 Days	05MAY-20OCT88	VICTORIA	Kos(0730)-Bodrum-Rhodes-Nissyros-Kos
FRI	7 Days	25MAR-18NOV88	BETSY ROSS	Piraeus(1230)-Mykonos-Rhodes-Patmos-Kusadasi-Piraeus-Istanbul-Skiathos-Santorini-Herakleion-Piraeus
FRI	7 Days	13MAY-04NOV88	WORLD RENAISSANCE & PEGASUS	Piraeus(1700)-Rhodes-Alexandria-Port Said-Ashdod-Patmos-Kusadasi-Piraeus
FRI	7 Days	22APR-04NOV88	ATLAS & PEGASUS	Piraeus(1800)-Santorini-Rhodes-Patmos-Kusadasi-Bosphorus-Istanbul-Mykonos-Delos-Piraeus
FRI	3 Days	08APR-28OCT88	STELLA OCEANIS	Piraeus(1100)-Mykonos-Rhodes-Kusadasi-Patmos-Piraeus
FRI	3 Days	01APR-14NOV88	OCEANOS & NEPTUNE	Piraeus(1200)-Mykonos-Rhodes-Patmos-Kusadasi-Piraeus
FRI	3 Days	25MAR-18NOV88	BETSY ROSS	Piraeus(1230)-Mykonos-Rhodes Patmos-Kusadasi-Piraeus
FRI	3 Days	18APR-21OCT88	CITY OF RHODOS	Piraeus(1830)-Rhodes-Herakleion-Santorini-Piraeus
SAT	7 Days	30APR-29OCT88	VICTORIA	Rhodes(0800)-Nissyros-Kos-Patmos-Kusadasi-Samos-Leros-Kalymnos-Kos-Bodrum-Rhodes
SUN	7 Days	24APR-23OCT88	VICTORIA	Mykonos(0800)-Delos-Tinos-Syros-Paros-Mykonos-Naxos-Ios-Santorini-Siphnos-Seriphos-Paros-Mykonos
SUN	5 Days	01MAY-30OCT88	VICTORIA	Kos(0800)-Patmos-Kusadasi-Samos-Leros-Kalymnos-Kos
SUN	3 Days	24APR-23OCT88	VICTORIA	Mykonos(0800)-Delos-Tinos-Syros-Paros-Mykonos

Source: Greek Travel Page, Aug. 1988

In order to satisfy the demanding taste of the Japanese tourists, it may be a good idea to design a special luxury one-day cruise course using a smaller ship, visiting only 1 or 2 island(s) and serving a deluxe lunch on board at reasonable price.

If one wishes to experience an Aegean cruise in its proper style, a 3-day cruise would be a minimum requirement. On the other hand, a 3-day cruise would be the maximum possibility for the Japanese with a limited span of time and money.

It must be noted, however, that 3-day cruises are only available March through November (mostly April through October) and that during the summer both the cruise ships and the islands tend to be overcongested. Therefore, it would be a practical idea to concentrate promotion of such cruises to Japanese for the seasons of spring and autumn.

The particular cruise we experienced had approximately 290 passengers to the capacity of about 550 (which was about 58% load). With this load, the ship was adequately lively and the service by the ship's crew was relaxing yet prompt and attentive, so as to make the short voyage an altogether very pleasant and satisfactory one.

7.2.4 Land Transport

1) Road Network

As of 1985, Greece's national road network (shown in Figure 7.2.3) has a total length of 8,915 km, which is supplemented by a provincial road network of 29,042 km. Almost 99% of the national road and 88% of the provincial road are paved in different forms (See Appendix 7.2I).

Although we have found in Athens and elsewhere that some roads are quite narrow and that the surface of major roads is sometimes in need of re-paving to avoid slipperiness in rain, we may say roads are generally in satisfactory condition and tourists can travel and visit tourist spots with reasonable comfort. Moreover, the Government is currently undertaking a project to upgrade the basic road network system into expressways.

2) Road Transport

As of 1985, Greek roads are used by 2,050,440 motor vehicles, of which 1,263,366 are passenger cars (one per 7.86 inhabitants) and 787,074 are commercial vehicles, buses and motorcycles. Of the total number of vehicles, 872,144 are based in the Greater Athens area (See Appendix 7.2J).

The greater part of inter-urban transport is carried out by buses owned by local cooperatives of bus-owners (KTEL). Each department (or "Nomos") has its own KTEL which is responsible for the transport of paying passengers within the department. The KTELs also link each department with the country's large urban centres. There are also some buses operated by the Organization of Greek Railways (OSE).

In 1985, 3,872 inter-urban buses carried a total of 164,591,000 passengers on different routes. Some inter-urban services from Athens to other major cities are shown in Appendix 7.2K.

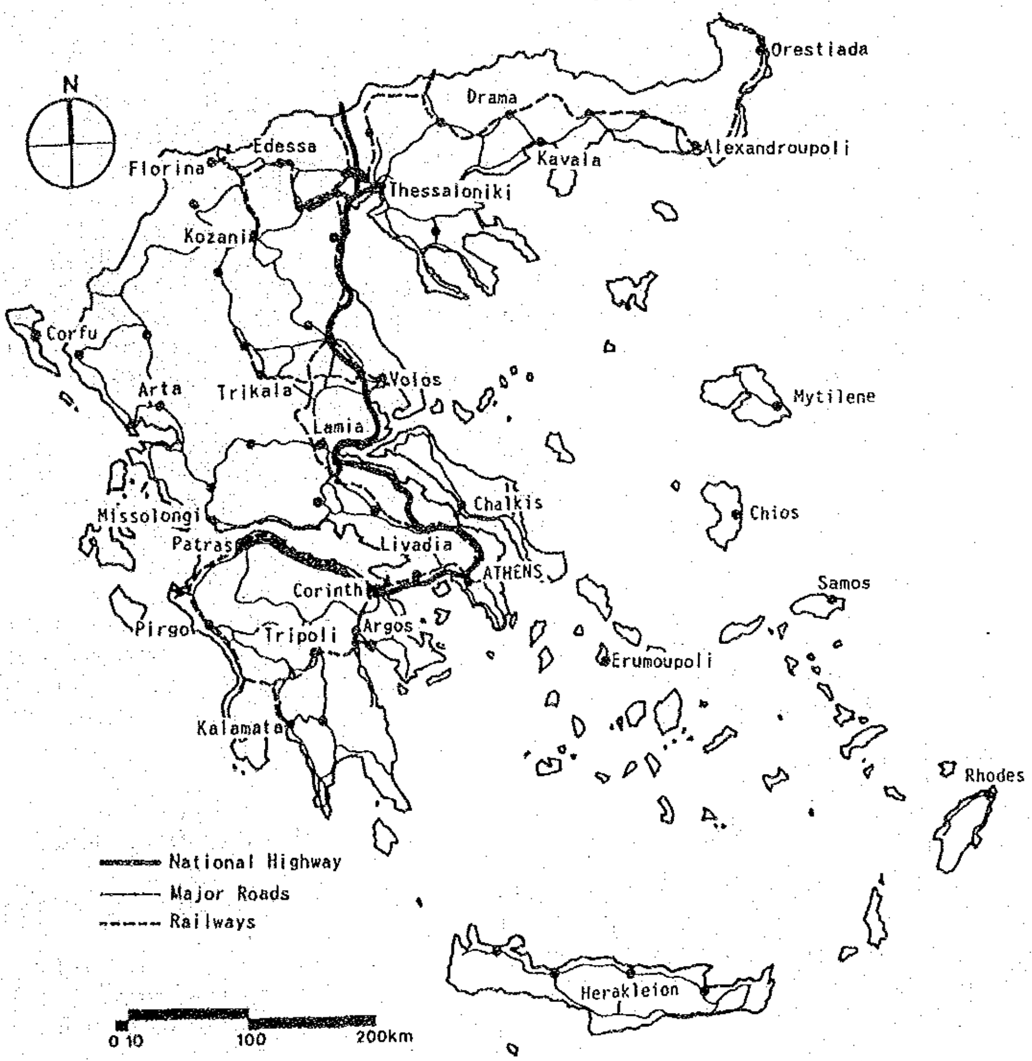
3) Railways

<u>System</u>

Railways in Greece have never been developed to the same degree as in most other European countries. A large part of Greece was under the Ottoman rule until the early 20th century when the railway construction was at full steam in the rest of Europe. Table 7.2.8 summarizes the length of operated lines of the Greece railways.

Most of the railway network, which consists of a single track and double-track lines (5% of the total network) are found only in and around Athens. The network is composed of a standard gauge (1,435 mm) and a metric gauge (1,067 mm).

Figure 7.2.3
Road and Railroad Network



There are a number of international railway services linking Greece with Yugoslavia, Bulgaria, Rumania, Austria, Turkey, Germany, France, United Kingdom, Belgium, Italy and Switzerland. These international services are said to be enjoyed by rail travel enthusiasts, but again very few Japanese tourists - unless they are residing in Europe - utilize them.

Table 7.2.8
Length of Operated Lines of the
Organization of Greek Railways by Network
(Greece Total: 1981-85)

	1938	1981	1982	1983	1984	1985
Total length of networks	2557	2479	2479	2479	2479	2479
1. Network of normal line of international width (Athens-Salonica network)	1435	1565	1565	1565	1565	1565
2. Network of metric width (Piraeus-Peloponnese network)	1071	892	892	892	892	892
3. Other lines (0.75-0.60) (Diakofto-Kalavrita)	51	22	22	22	22	22

Source: Statistical Year Book of Greece, 1986

Greece's most important railway section is the standard gauge Athens - Thessaloniki line, which has two extensions. One extends to the east, to the Bulgarian and Turkish borders, and the other to the north, linking Greece to Central Europe via Yugoslavia. The standard gauge network also has some branch lines (Larissa - Volos, Thessaloniki - Florina/Kozani). The total length of the standard gauge line is 1,565km. The metric gauge network, with a total length of 892 km, consists of a circular line in the Peloponnese (Athens - Corinth - Patras - Kalamata and Kalamata - Tripoli - Corinth - Athens) and the Volos - Kalambaka line in Thessalia.

There is also a 22 km long rack railway from Diakofto to Kalavrita in the northern Peloponnese which runs through the gorge of the Vouraikos River and is more of a tourist attraction than a means of transport.

All of Greece's railways, with the exception of the electric railway (Metro) in the capital, belong to the Organization of Greek Railways (OSE). Domestic railways fares and schedules are shown in Appendix 7.2L.

Traffic

In 1985, OSE trains carried a total of 11,156,000 passengers.

The number of foreign tourists arriving in Greece by means of railways in 1985 was 164,885, accounting for only 2.5% of the total number. Although railway travel is reportedly incorporated in some tour itineraries, railways are not considered to be a primary mode of transportation for tourists.