

**RESEARCH INSTITUTE
FOR TOURISM**

Stadiou str. 24

105 64 Athens

Tel. 331 2253, 331 0022

Fax. 331 2033

Athens, 24 November 1998

PRESS RELEASE

Seasonality in Greece and in Competitor Countries

RIT presents the study of Mr. A. Tsitouras “Seasonality in Greece and in Competitor Countries”

The study examines the timeline of tourism demand in Greece compared to competitor countries, the alternatives in tourism development and a policy frame aiming to reduce seasonality.

The seasonality of foreign tourist arrivals in Greece on a twelve month basis has increased by 13,1% and of overnight stays by 16,2%. The econometric research of the twelve months of seasonality showed that the most important factor for this increase is not the significant increase of arrivals in this period, but the long-term association of the Greek tourism product with summer season. If there is no change in tourism policy then the 12-month seasonality will continue to increase. The increase in arrivals contributes over time to the corresponding expansion of seasonality of arrivals, as tourism market affects mainly summer season.

In **Spain**, despite the more than doubling of visitors between 1975 and 1995, there is a significant reduction in the seasonality of arrivals, by about 34.8%. In **Portugal**, the number of tourists increased more than ten times between 1975 and 1995 and seasonality increased by 26,8%. The increase of the seasonality of arrivals was recorded mainly in 1975-85, while since then the seasonal pattern of arrivals shows stability, a phenomenon that is also reflected in the seasonality of the overnight stays.

In **Italy**, a significant increase in arrivals by 54% between 1975 and 1995 was combined with a decrease in seasonality by 39,9%. In **France**, the increase of visitors by 79% between 1982 and 1995 was combined with a decrease in seasonality by 17,2%. In **Turkey**, the seasonality of arrivals decreased by 16,8% between 1975 and 1985. The rapid development of tourism by 196,2% in the decade 1985-95 resulted in increase of seasonality by 7,5% between 1975 and 1995.

Compared to the other competitor countries

- Greece records in 1995 higher seasonality of arrivals by about 75,5% compared to the average of competitor countries, followed by Portugal (31,4%) and Turkey (5,7%),
- Greece presents the highest seasonality of overnight stays in 1995, about 100,8% higher than the average of competitor countries followed by Turkey (82,6%) and Italy (12,7%),
- The difference in the seasonality of both arrivals and overnight stays between Greece and competitor countries becomes wider over time. This expansion is greater regarding overnight stays.
- Greece has the second smallest relative size of domestic tourism, since in 1995 1.156 overnight stays per 1.000 inhabitants were recorded, compared to the average of 1.473 for competitor countries.

Only the improvement of provided services and the upgrade of the tourism product can contribute to the reduction of seasonality. The changes in the composition of hotel infrastructure indicate an improvement trend in European competitor countries. In our country, where tourism activity presents relatively high seasonality, almost nothing has been done on a practical level.

The study of Dr. Tsitouras examines alternative scenarios regarding the evolution of tourism figures and concludes that, if seasonality is limited to the average of competitor countries, then

- The share of winter season arrivals could increase from 15% to 33,1% and of overnight stays from 10,2% to 28,1%.
- The total number of arrivals of foreign tourists could reach about 14 million in 2000 compared to 11,4 million without mitigation policy and 15,9 million in 2005 compared to 12,9 million without a mitigation policy.
- The total number of overnight stays of foreign tourists could reach 75,8-81,2 million in 2000, compared to 59,4 million without mitigation policy and 85-91 million in 2005, compared to 66,4 million without mitigation policy.

Directions of tourism policy that could contribute to the reduction of tourism seasonality are the following:

- Addressing the problem of air transport
- Addressing the inefficiency of existing infrastructure
- The development and promotion of winter tourism product
- The twelve-month, continuous and consistent promotion of Greek tourism destinations.