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DEVELOPMENT OF YACHTING SECTOR IN GREECE

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ABSTRACT

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Maritime tourism in Greece has always been and continues to be an integral part and characteristic feature of the country, while it dominates the other forms of tourism that thrive in Greece. The maritime element is directly interwoven with Greece. For this reason, marine tourism, yachting tourism, cruise tourism and water sports tourism have been particularly developed.

In this thesis, I have dealt with the Greek yachting sector and its prospects, as well as its further development and consolidation in the Greek reality. Greece has all the necessary elements and comparative advantages (natural wealth, landscapes, antiquity, cultural monuments) compared to other countries to become a key yachting destination worldwide.

Initially, in the theoretical part of the thesis, an introduction to the concept of yachting and the elements that constitute it was made, while reference was then to the Greek reality in which it is active. In the context of secondary data, the collection method included the use of various books and journals to properly consolidate the study.

In order to provide a detailed and appropriate study on yachting in Greece, a quantitative survey analysis was also conducted. The primary data was collected by a survey method, based on a questionnaire given to captains of boats that berthed in the Marina Rhodes during summer 2022. The analysis of the results and the processing of the data were conducted by the Microsoft Excel program. The questionnaire results were analysed and illustrated by pie charts.

Based on the studies of the characteristics, present situation and the conditions prevailing in the yachting sector in Greece, and by analysing the data obtained from the research conducted, results and conclusions were presented. Finally, based on the conclusions drawn, some policy recommendations and measures were presented to achieve further development of yachting in Greece.

Key words
Greece, infrastructure, maritime tourism, ports, yachting.

CONCEPT DEFINITIONS

ACS	Association of Caribbean States.
CEU	Commission of the European Union
CLIA	Cruise Lines International Association Cruise Europe Organisation representing the interests of cruise ports.
ECC	European Cruise Council.
EU	European Union, comprising 27 member states
Homeport	Port at which a cruise ship is based.
International cruising	Ships that visit international ports.
Lower Berths	The normal capacity of a ship when two beds in each cabin are occupied.
MedCruise	Organisation representing the interests of cruise ports located in the Mediterranean.
OECD	Organisation for Economic Co-operation and Development.
Pax	Abbreviation for passengers.
Pax-nights	Number of passengers in lower berths.
Port-of-Call	Port at which a cruise ship is approaching during the cruise
PSA	Passenger Shipping Association.
(UN)WTO	World Tourism Organization

In the memory of my Father

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1 INTRODUCTION

In this thesis, I will study the characteristics and elements that make up yachting tourism, in conjunction with the research that will help us through its results to conclude whether and to what extent there are the appropriate conditions for the development of this sector in Greece, proposing the appropriate actions for its enhancement. The main problems facing Greek marine tourism are mainly related to infrastructure issues and the organisation of the overall services provided. Although Greece, mainly due to its geographical location, could be in a higher position in the global tourism ranking, the fact that it does not always and in all its regions provide services commensurate with their cost keeps it in lower positions.

Today, in Greece, there is a significant shortage of berths for both charter tourists and boat owners, especially during the summer months, while there is a greater shortage of berths for mega yachts, a category that is aimed at very high incomes. As a result, Turkey attracts not only the customers who choose the sea routes on its coast but also many of those who choose the Greek islands, who call at tourist ports on the Asia Minor coast to benefit from the higher level of services and lower docking costs, and even for the maintenance and winter storage of tourist boats.

Moreover, Greece lags its competitors in marketing and promotion in general, because it does not show a targeted and continuous action on such issues. A typical example is the country's advertising campaign and logo, which are constantly changing without being able to make an impression in the mind of the potential tourist-consumer (Kokkosis, Tsartas & Grimba 2011). Another key problem for Greek marine tourism is the relatively limited number of commercial yacht companies. In the past, the number of these companies has fluctuated either upwards or downwards, depending on the size of the yacht market, and in difficult times, some of these companies have been forced to leave the industry.

1.1 Research aim and objectives

The main aim of this thesis is to analyse the development of yachting sector in Greece. The specific objectives of this thesis can be outlined as the analyses of the present status of the yachting sector in Greece and the evaluation of the economic, social, and environmental impacts that the yachting sector has. Moreover, an examination of way the port facilities and infrastructure can be developed to reflect the development, along with a description of the future of the yachting sector in Greece.

All the above are the general objectives and aims, to be answered in the following. Finally, to summarize, the thesis aims to identify the problems that yachting has in the Greek reality, regarding the infrastructure offered, the services and the organization of marinas, the berths, and the cost of berthing, as well as the institutional framework applied in the country and the mentality of tourist.

1.2 Introduction to the position of the object investigation

The following research was carried out in the context of a thesis and its subject was the prospects for the development of yachting tourism in Greece. Taking into consideration the natural characteristics of the country (Polynesia, large coastline, natural wealth), as well as the current situation that prevails, on the basis of comparative data available worldwide, Greece has all the elements that can claim a competitive position in the yachting industry on a global scale. In addition, this thesis consists of primary data obtained by the completion of a questionnaire survey which includes questions such as are the respondents satisfied with the yachting services offered in Greece? Does the primary data agree and complement the experts' views on the prospects for the development of this sector of tourism in Greece?

Based on the survey, potential policy measures and actions to be taken by the competent authorities to cover the weak points of yachting and its further development emerge.

1.3 Formulation of the research questions

Greece has natural wealth and characteristics that can help to conquer a strong position among competing countries in the yachting industry. But is it feasible to claim such an important position on a global level? The research problems therefore relate to the development potential that the country can have in this sector, mainly the sufficiency of proper utilization of all its infrastructure and superstructures and the exploitation of its natural characteristics sufficient for the development of this type of tourism. Are these alone sufficient and, if not, what is missing? Also, can the development of yachting in Greece be a means of attracting tourists from all over the world, but also of strengthening the economy? Are the owners and users of yachts satisfied with the services provided by leisure tourism or are they turning to other markets in other countries?

The survey was conducted to answer the questions that exist regarding the supply and demand in Greece, the shortcomings that exist and the actions that could be taken to achieve the development of yachting tourism.

1.4 Importance and usefulness of the thesis

The purpose of the research is to record the current situation in Greece, in the yachting sector, so that through the problems and weak points that it presents, policy measures and proposals could be made to strengthen the sector and further develop it in the future. Through the field research and the analysis of all secondary sources, information was collected about the existing situation and the improvements that need to take place for the development of this industry in the country. Furthermore, the views of the industry professionals, such as yacht users and owners, were recorded regarding the development prospects of yachting in Greece. The research aimed to record the weak points of yachting tourism and the actions that could be taken, taking advantage of the geomorphological wealth of Greece. The aim was to support the improvement prevailing situation and help Greece to become a global yachting centre, attracting every year a large number of tourists.

To summarise, the results include proposals, conclusions, and potential policy measures to enhance the development of yachting tourism in Greece, as well as promotional measures to promote the country as one of the most important and safest destinations worldwide in the yachting sector.

2 CONCEPT AND FORMS OF TOURISM

The word "tourism" comes from the French word "tour" which means travel. By the term tourist, we mean a person who has a portion of their income to make some wanderings and to meet new places. In ancient times the "tourist" was a person with a lot of time and money for travel. Today with the diversification of needs, tourism is a human need. The concept of tourism means the activities that people do during their travels and living in a different place from that of permanent residence for less than one year. These trips are made for entertainment reasons but also for work reasons. (Lagos 2005.)

According to the United Nations Travel and Tourism Organization the term guest is divided into two categories. Initially there is the concept of tourist, that is of the person going to a new place for leisure, vacation, health, religion and even for sports activities. The tourist stays at place visited for at least twenty-four hours. According to that meaning, tourist is a person who visits an area for less than twenty-four hours either as an airplane or ship crew or as passengers of cruise ships who stay in that place without spending the night there as well. (Lagos 2005.)

2.1 Conceptual approach to maritime tourism

Tourism is one of the most intense mass social events of the world community, with a human-centred character, an industrialized activity, which has become an important factor in both foreign trade and a great source of foreign exchange, while also contributing to the creation of jobs, employment, and income in many host countries (Lagos 2005). As Lagos and Liargovas (2003) point out, alternative tourism is associated with several sub-forms of tourism, in search of a different way of vacationing. The categories of alternative forms of tourism include agritourism, rural tourism, sports tourism, tourist tourism, ecotourism, cultural tourism, mountain tourism, winter tourism, mountaineering tourism, adventure tourism and maritime tourism.

Contact with the liquid element is very important because, on the one hand, it raises environmental awareness and, on the other hand, it favors forms of tourism related to the sea, such as maritime tourism, yachting and sailing tourism, cruise tourism, cruise tourism and water sports. The product group with the basic criterion of development the sea refers to the total of the tourist activities that develop in the marine area of a host country and includes all the tourist activities related to the sea and the coastal environment.

Specifically, the term "maritime tourism" characterizes a special form of tourism, where the consumer (tourist) decides to spend most or all of their vacation time "at sea", choosing as a place of residence and entertainment a ship, which offers a predetermined maritime tour program, or a vessel, which may co-decide on the maritime navigation program to be carried out. In both cases a ship or boat is at the same time also means of transportation (Diakomihalis 2009). The main forms of the organized market of maritime tourism internationally are cruises and private maritime tours offered using yachts (yachting) (Miller & Auyong 1991). However, as far as Greece is concerned, the main products of maritime tourism include the Day Maritime Tour (i.e. day cruises), which constitutes the activity of Coastal Touring Shipping as a separate product (Diakomihalis 2009).

Maritime tourism has an international character, and while based on its natured maritime element, by rational management it can become a lever of development for the coastal and island regions of Greece. It is an economic sector that usually defies the disadvantages that may be caused by the unfavorable geographical location, because with the shipbuilding technology and with possibility construction of various types of passenger ships achieves development of transport and tourist sector. (Miller 1993.) The development of maritime tourism presupposes significant investments in infrastructure and superstructure projects, the costs of which are particularly high, mainly in terms of the construction of port facilities for the safe mooring and refueling of ships and pleasure boats, such as modern marinas, and tourist shelters. In addition, to meet the requirements of both passengers and crews of cruise ships and yachts, tourist ports must have modern equipment.

The contribution of the infrastructure and the means of shipping in the composition of this special tourist product is decisive and includes on the one hand the ports, the marinas, the boat shelters, and the sea roads, while on the other hand includes boats and ships, as a complete system fully integrated in the leisure activities provided by Maritime Tourism. With the participation of shipping, maritime tourism acquires its true content and is expressed through maritime tour, as it provides a travel with the option to experience many of her expected experiences in the marine environment. Otherwise, both the proximity of the coastal zone with other transport systems (land or air) and the installation in coastal accommodation weaken the directness of the traveler to the sea and reduce the duration of contact with it. (Lekakou & Tzannatos 1998.)

2.2 Definition of private yachting

By the term private yachting offered using yachts (yachting), we mean the rental of a boat in order to be used both as a place of residence and entertainment and as a means of transportation, by a group of people who have the opportunity to choose and configure together the program of their sea tour, for the purpose of their leisure (Diakomihalis 2009). Yachting also provides a traveller with a special immediacy with the sea to the extent that it combines on the one hand the experience of navigating and steering the boat in destination personal choice, and on the other hand the immediacy with the liquid element. Finally, it gives a traveller opportunity to approach island and coastal areas, while providing her a wide range of options for the enjoyment of the marine environment. (Mylonopoulos & Mira 2005.)

More specifically, for a tourist, who chooses the specific form of tourism, the yacht, in addition to accommodation and food, is also a place for a variety of activities such as: Scuba diving, amateur fishing, observation of marine mammals, access to inaccessible, (by land), shores water ski, tour, swimming in isolated places and various artistic, scientific, and cultural events on a ship or boat (Kokkosis, Tsartas & Grimba 2011).

2.3 The global yachting market

Yachting tourism comes in many forms, such as fishing, sightseeing, and sailing leisure. America has the most developed tourism industry, followed by countries in the coastal areas of the Mediterranean. The table below shows that there are about 222,600 seats in France, 130,555 in Spain, 13,416 in Croatia, 130,000 in Italy and 8,924 in Greece. Compared to other Mediterranean countries, Greece has the lowest average anchorage density: just 0,56 bunk beds per kilometer of coastline. The corresponding average for Mediterranean countries is 9,00, while in France it amounts to 35,24 (Table 1).

TABLE 1. Numbers of yachts in the Mediterranean countries (Hellenic Chamber of Shipping and university of Piraeus 2012, 145)

COUNTRY	ANCHORAGE	COASTLINE (km)	Average distance/ km
GREECE	8,924	16040	0,56
FRANCE	222,600	6136	35,24
CROATIA	13,416	8032	1,67
ITALY	130,000	9532	13,64
SPAIN	130,555	6882	18,97
TURKEY	8,659	9827	0,88
MALTA	1,108	197	5,62
MAVROVOUNIO	837	293	2,86
SLOVENIA	1,475	1381	1,07
TOTAL	517,574	58500	9,0

It is worth noting that in recent years there has been increasing competition between the Mediterranean countries, especially in maritime tourism (Pardali 2007). In terms of the sector yachts, the Mediterranean region can be divided into two sectors, namely: the west coast (mainly France, Spain, and Italy) and the east coast (Greece, Croatia, and Turkey). In terms of the number of vessels, the most important European countries are Sweden, France, Finland, Norway, Britain, Germany, and Italy, as we see in the figure below. In these developed countries, the development of the tourist vessels is linked to the booming shipbuilding industry and the development of public maritime sports. It should be noted that Croatia has built more than 56 well-organized marinas, while the total number of vessels exceeds 13,416, although its population is only one third of Greece (Figure 1).

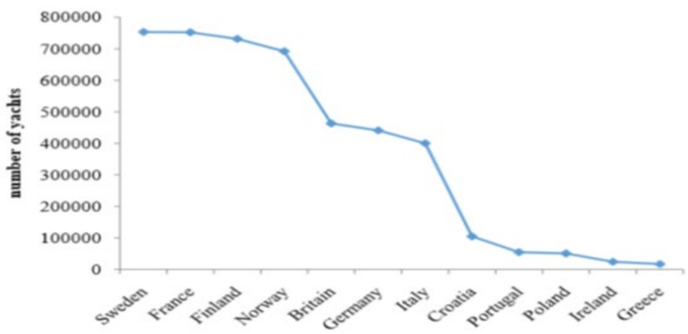


FIGURE 1. Numbers of vessels in European countries (Hellenic chamber of shipping and university of Piraeus 2012, 186)

Internationally, the industry is represented by ICOMIA (International Council of Marine Industry Associations). ICOMIA was founded in 1965 and aims to integrate all national links related to the yacht industry worldwide, with a view to their international representation. In particular, it organizes for its members conferences, proposes solutions to key issues, represents its members in official bodies and authorities, and informs them of developments in the industry, legislation and trends. According to market participants, the number of international orders for mega yachts and superyachts with a length of more than 60 meters, shows an upward trend in recent years. Consequently, there is a tendency of increasing demand for large berths. (ICOMIA 2018.)

Cyprus will be able to host more than 4,000 boats in the coming years, since it was completed the procedures and construction projects of the promoted Ayia Napa marinas, Paralimni and Paphos, as well as the development of the existing Larnaca marina. These are projects, which are promoted with the aim of upgrading the tourist infrastructure of Cyprus and improving the maritime tourism on the island in general. It is worth noting that now, with the operation of existing marinas of Limassol, Larnaca and the private marina of the hotel St. Raphael at Details of the Tourist Ports Limassol, Cyprus can accommodate about 1,600 boats. In February 2019, the operation of the Ayia Napa marina began. (Entrepreneurship Support Center of the Municipality of Piraeus 2019.)

Interesting is the case of Turkey, which has been mobilizing since the late 1970s systematically in the area of marinas, with the result that 2019 it has 36 tourist ports in Turkish coast and Northern Cyprus, with a total capacity of over 25,000 seats (Entrepreneurship Support Center of the Municipality of Piraeus 2019). The country's berths are in the Istanbul area of Marmaris, Smyrna and Antalya with modern infrastructure. An important presence has diverse Dogus group which manages a network of ten (10) in total Marinas with a total capacity of 8,270 berths in Turkey, Croatia but also Greece. There are currently 56 marinas in Croatia with a total of 16,000 berths and 8,500 wintering places on land. The state interests have a strong presence in ACI marina group which manages a total of 21 marinas throughout the country.

Close to the Mediterranean are also the United Arab Emirates which aspires to develop their own Riviera for super yachts. Today the country has 35 marinas and about 6,000 mooring points, acting as a transit point for super yachts. Maritime tourism is beginning to be recognized as a very key growth factor also for Russia, which has now begun efforts to promote all those parameters related to yachts (Entrepreneurship Support Center of the Municipality of Piraeus, 2019). Another important factor is that Russian yacht owners have lately avoided arrival in European ports, which is mainly due to the sanctions on Russia from the European Union and America, related to the war in Ukraine. The Russian oligarchs with the mega yachts therefore typically prefer Turkey, which is a country that does not belong to the European Union.

3 YACHTING TOURISM IN GREECE - A PESTEL ANALYSIS

It is a fact that Greece attracts more than sixteen (16) million tourists a year. Since ancient times, Greece has been a pole of attraction for tourists internationally both for its long history and for its beautiful and famous beaches (Kitrinoy, Rontos & Papanis 2011). Greece due to its geomorphology could be characterized as one of the largest maritime countries in the world. It has 16,000 km of coastline, 3,000 islands and islets, 1,600 coves, and a large number of passenger boats. Maritime tourism refers mainly to yachting and cruising. Sub-activities of marine tourism are diving tourism, rowing, sailing, balance on a board, sea kayak, scuba diving, windsurfing, kite surfing, etc. (Sitaras & Tzenos 2007.) It is widely accepted that having a strategy in an organization or business contributes significantly to their further progress and development but also in preparation so that they can emerge unscathed from a crisis. An organization's strategy essentially determines its long-term success and even its survival.

All organizations/businesses irrespective of their size should follow a strategy and the choice of strategy should be done after proper analysis. What is mainly required is to assess the very core of the organization, identify the strategies used to achieve the objectives, the technologies used as well as the resources available. It is also important to consider all external factors that affect its activities. The most well-known type of this type of analysis is the PESTEL analysis. This analysis is essentially a tool for identifying critical external factors that may affect an organization. These factors can be opportunities that provide a competitive advantage but also threats that could become so severe that they lead to catastrophic consequences. PESTEL analysis is important in strategic management as it provides an overview of all possible impacts on the organization/business. But reaching the final conclusions can be made only when the analysis is fully completed and all individual factors are taken into account. (Kyprianidou 2021.)

The main factors evaluated in the PESTEL analysis are political, economical, social, technological, environmental and legal factors.

The benefits of an analysis such as the PESTEL analysis can be very significant since they give an image of the opportunities, how an action plan will start with positive prospects and how it will decrease the individual risks.

3.1 The political environment

In 2014, Chen, Balomenou, Nijkamp, Poulaki & Lagos (2016) conducted a study on the sustainability of Yachting tourism in Greece. Specifically, the determinants and the satisfaction of tourists were studied using a questionnaire. The research questionnaires of Chen et al. (2016) were distributed in 10 Greek marinas that meet the legal requirements: Alimou, Floisvou, Glyfada, Elliniko, Vouliagmeni, Faliro, Zea, Gouvia, Corfu, Kalamata, and Patras. The research focused on the question of whether boat users and other interested parties are satisfied with the facilities and services offered by the Greek marinas, to ensure the competitive and sustainable development of yachting in Greece.

The regression results of the study by Chen et al. (2016) showed that the prevailing industrial policies have negatively affected the viability of the Greek yachting industry. The comparative study by Chen et al. (2016) also provided new knowledge that may guide the development of Greek yachting in a more sustainable direction, as shown by the perspectives of other countries' strategies. In addition, the field research of yachting users and other stakeholders allowed to identify the relevant factors of sustainability in the Greek tourism industry.

3.2 The economic environment

The impact of yachting on the Greek economy is manifold: financial, fiscal, and economic. The financial contribution is made through total revenues of the tourist ports and in terms of stimulating the local markets. According to the latest available data of the Hellenic Tourism Organization (EOT), those who choose yachting services in Greece are mainly high-income foreign tourists. Specifically, while the average tourist in Greece spends about $ 75 per day stay, tourists who come to Greece to do marine tourism spend about $ 120 per day per person. The total expenditure from local and non-port users as well as from the collection of the corresponding taxes from the port users and related professions have a budgetary impact. Finally, the economic impact is the combination of total expenditures, the creation of new income, the stimulation of employment and the foreign exchange contribution. (ICAP 2009.)

It has been pointed out that in the wider revenues related to charters and directed to the Greek economy, both the expenses incurred by the charterers (yacht renters) during their stay in Greece (representing revenues of the companies in the sector), should be considered, as well as revenues from a number of professions or business activities that are directly or indirectly related to the support of Greek yachting (such as, for example, revenues related to fuel consumption, entertainment or leisure services, etc.). However, the maximization of all these benefits will come mainly from the improvement of the competitiveness of the companies of the yachting sector in Greece. In recent years, companies in the sector have been intensifying their efforts to faster renew their fleet (sale and purchase of new modern boats every 4-5 years), as well as providing a complete package of services (management of privately owned or leased marinas throughout Greece). (Chen et al. 2016.)

3.3 The social environment

The concept of yachting is synonymous with the rental of various categories of professional yachts, mainly sailboats and yachts, which are the means used by a group of tourists to make a leisure trip to the sea, with stations in various ports and coasts. The chartering of yachts of all kinds, such as luxury yachts, sailboats, speedboats, etc., is the most productive and foreign exchange activity of maritime tourism. It is aimed mainly at high-income people, and product demand was been growing internationally. (Hall 2001.)

Summer vacation by boat provides comfort and organization of time, as tourists who choose this type of vacation, have the opportunity and comfort to organize their visits to attractions or other destinations, to enjoy independence in their choices, free from waiting in lines and the usual inconveniences, even from taking care of reservations (in the means of transport) and rooms. Above all, however, in the yacht the passenger determines the place and time of his leisure activities. The most important advantage of yachting is the autonomy of leisure, i.e. the complete freedom in choosing the destinations that its passengers have. It gives them the opportunity to change their schedule and destination, to visit areas of special natural beauty, to enjoy activities such as swimming, diving, or fishing at the time they want and in places for which there may be no other access, while at the same time to enjoy the peace and quiet of the place. (Diakomihalis 2009.)

The entertainment offered by the activities in the coastal areas covers the human needs for relaxation, for rest, for peace of mind and tranquility with the observation of the marine flora and fauna. It is possible to communicate through water games or through the cruise. It can be a long trip for the purpose of diving or participating in a water sport. In addition, the need for prestige and appreciation from the social environment (acquisition of a boat) is covered. The sea offers different levels of rest and excitement. It creates many kinds of motivations, even those for loneliness, for peace and for contact with nature. (Mylonopoulos & Mira 2005.)

3.4 The technological environment

In addition, the infrastructure, and the quality of the provided services of the tourist ports play a decisive role in the development of the sector. Marinas are also commonly called yachts, with special constructions to serve 500-2000 yachts on a daily basis. The organized ones have mooring places, security and security services, repair areas, post offices, parking and leisure areas, commercial department store, customs, refueling station, waste collection & biological treatment plant, port authority and administration offices. The marinas of Greece lag the marinas of other European countries, not having the above facilities or where they have them, they are poorly organized. In recent years, marina management companies have begun to realize the need to modernize their infrastructure and management, to improve their overall services and become competitive. (Chen et al. 2016.)

Compared to the situation in other Mediterranean countries, it is obvious that Greece lags in yachting infrastructure and shows great room for improvement. Observing the development of the respective sector in direct competitors countries such as Croatia and Turkey, it can be realized that the need to accelerate the construction, licensing and operation of yachting infrastructure becomes imperative. (Zervakis 2015.)

3.5 The ecological environment

The "Blue Flag" is an international symbol of quality, considered the most famous environmental symbol in the world. It has been awarded internationally, since 1987, to all coasts and marinas that meet its requirements. It is not enough for the shores to have only the desired, excellent quality of bathing water. In addition, all 31 strict criteria must be met, based on cleanliness, organization, information and safety of bathers and visitors. Figure 2 illustrates the situation in Greek marina industry.

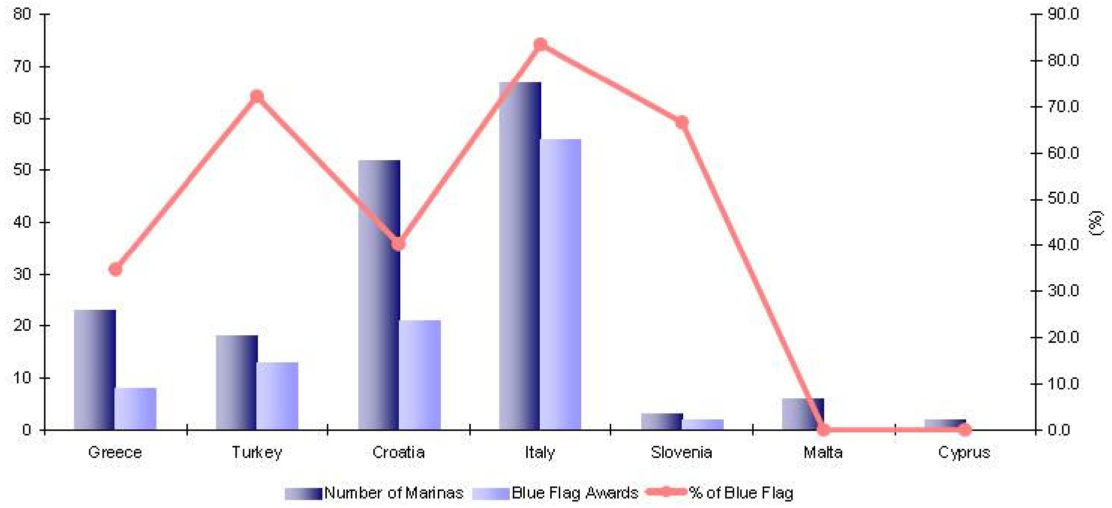


FIGURE 2. The Greek marina industry and blue flag awards (Papadimitriou 2009, 14)

The protection of the natural resources of the coast and the coastal area is also considered extremely important. Large travel agencies abroad place special emphasis on the “Blue Flag” when choosing the destinations they offer to their customers, insisting on the good services offered in coast, but also in environmental protection. (Papadimitriou 2009.)

3.6 The legal environment

In Greece professional yachting association, is characterized as the boat, which has a transport capacity up to forty-nine (49) passengers, which has space accommodation, in addition to those of the crew, and is used exclusively for performing leisure or tour trips with total charter. Also, the boat must have a total length of more than 7 meters. (Government Gazette A '211 / 13.10.1999.)

Private yacht has been defined as a non-professional yacht in accordance with the provisions of the above law. This means that execution of leisure trips or tours with payment of fare is prohibited by private pleasure boats with Greek flag. Advertising is also prohibited, in any country and in any way. (Ministry of Development & Competitiveness & Shipping 2011.)

For the operation of a pleasure boat regardless of flag, the following is required: a) a certificate of the competent service of the Tax office (T.O) and b) registration of its data in the Register of Tourist Ships and Small Boats. For the operation of the ship lease a total charter contract is concluded. Partial chartering is prohibited. The duration of the charter contract may not be less than eight (8) hours. The place and time of commencement and termination of the charter contract are considered, and respectively the place and time of delivery and re-delivery of the yacht listed in the charter agreement. Execution of up to two (2) total charter contracts is allowed within the same twenty-four-hour period.

Charter contracts which are executed, by the same ship, within the same twenty-four hours are considered one (1) day charter for the execution of a charter contract, in which the place of delivery and the place of return of the ship yachts are in the Greek Territory, the following yachts are allowed: yachts under the flag of Greece or another EU Member State or the E.O.X., as well as yachts under the flag of a non-EU country or of the EEA, with a total length of more than thirty-five (35) meters, provided that they are mostly made of metal or plastic and have a carrying capacity of more than twelve (12) passengers.

Commercial pleasure crafts must complete every three years, from the date of their entry in the Register, a minimum number of charter days, which is set at:

1. one hundred and five (105) days when they are chartered without a master and crew,
2. seventy-five (75) days when they are chartered by a master and crew,
3. twenty-five (25) days in the case of designated as traditional, regardless of whether they are chartered with or without a master and crew. (Law N 4256 / 14.04.2014.)

4 ECONOMIC & SOCIOLOGICAL DIMENSION OF MARITIME TOURISM

The sea is very important for humans, both economically and sociologically. Most of the world's population lives in coastal areas. This is a way of entertainment that is highly preferred by all people. It is possible to participate in marine leisure activities in all age groups and in all income classes. Coastal and maritime tourism are a part of the tourism industry. For some countries it is the main or even the only backbone of tourism. However, in maritime tourism there is great difficulty in recording its true size. Tourism industry statistics do not provide specific statistics on tourism in coastal areas. The capture of this form of tourism includes activities such as cruising, travel, and yachting, while for example there is no information on diving tourism. (Mylonopoulos & Mira 2005.)

From a sociological point of view, the marine environment causes awe to the visitor, who either participates actively or passively. The sea and consequently maritime tourism cover a large number of human needs. Maslow with his theory of "Hierarchy of human needs" grouped needs into five categories: the biological or physical, the security needs, the social needs, the psychological needs and the needs of self-realization or self-fulfilment. (Mylonopoulos & Mira 2005.) Maritime tourism, depending on the criteria of the maritime space where it is developed and the vessel used, is divided into the following categories: Coastal tourism, underwater tourism, marine nature tourism, marine fishing tourism, maritime cultural tourism, marine sports, yachting and cruise tourism (Mylonopoulos & Mira 2005).

With the development of maritime tourism, different cultures come into contact. Through this contact, elements of their cultures are exchanged. Maritime tourism changes the habits of the cultures that come into contact, and brings changes to the lives, customs and habits of their inhabitants. The effects of maritime tourism are directly linked to the social and cultural environment as well as environmental impacts. Maritime tourism is one of the most important forms of alternative tourism. In Greece maritime tourism brings an increase in the incomes of the inhabitants, and by the extension of the countries, creates new jobs through the need to create new infrastructures, and results in the improvement of the country’s' balance of payments. With the entry of more tourists, becomes a higher demand for tourist accommodation so that everyone can be served. With the need for more accommodation, many jobs are created, and this actively participates in the increase of local income. With the needs of tourists growing, and who choose the alternative form of marine tourism, new jobs are opening catering, clothing, training on marine tourism and finally training on rental services. Although maritime tourism is primarily seasonal its significant contribution to the reduction of unemployment must be emphasized. Maritime tourism contributes to the improvement of living standards and the development of remote island areas. Maritime tourism develops the regions, even Athens, which is the center of Greece and there is the main development of the country's economy.

In island regions, history, culture and geographical peculiarities, as well as the prevailing climate, are all elements that help the development of these areas. This type of alternative tourism not only helps to improve the conditions of local societies, but also to the income of the country in general. This is due to the increase in tax revenues, both direct and also indirect, meaning the collection of the state tax through the purchase of products and services. Because of the revenue from maritime tourism, the deficit of the country is reduced and its economy an improve. With the existence of a deficit, the country is forced to borrow money from other countries with a more stable economy and thus increase its debts to third parties. With the existence of the economic crisis, countries cannot straighten up and pay off their debts and so the debts are passed on to next generations.

4.1 Yachting in Greece

The analysis of the Greek tourist port market highlighted an integrated network of sited tourist port infrastructures which needs minimal interventions, but which has not been fully developed, depriving Greece of a functional network of tourist ports for the benefit of the national and local economy. As for the economic impact, there are a number of studies that approach the added value mainly of maritime tourism, and through it tourist ports, to the national economy. The study of the Hellenic Chamber of Shipping (2012) estimated the total costs of yachting at €607,233,900 and at 3,063 jobs only on the boats docked in Attica.

However, the calculation of expenses is a part of the total revenue generated by the specific activity in the national economy. The study by the Institute of the Association of Hellenic Tourism Enterprises (SETE 2018) estimated total yachting revenues at €800 million and direct employment at 11,500 jobs. The study of the Hellenic Professional Yacht Owners Associations (2020) estimated total revenues at €1.016 million and employment at 43,626 jobs, with 10,903 of them being direct jobs.

On the other hand, it should be noted that the lack of a uniform scientific methodological approach, as well as the selection of the appropriate economic quantities to be measured, creates limited points of comparison of the conclusions of the studies in question. In the research, scenarios for the development of marinas were carried out. Even the partial construction of berths that have already been allocated but have been stagnant for many years can significantly benefit the national economy while contributing positively to employment as well. The impact on employment in both scenarios considered could be even greater, if the indirect positions that occur as a result of the recirculation of money caused by direct changes in the national economy were also taken into account.

In the optimistic scenario, the country could expect revenues of €330 million on a primary basis, starting in 2030 when the construction of all berths will be completed. In the best scenario, the revenue jumps to around €600m on a base basis from 2030 onwards. It is reasonable to ask the question of the optimal distribution of these benefits in the various regions of the country and especially in the less developed ones. In this direction, the spatial distribution of the new berths at the base and the conclusions for the network of tourist port facilities are important. Initiatives have been then at both central (strategic and policy planning level) and local levels to promote the construction of tourism port facilities, but many moves have not been made to move forward with their construction process. Especially in regions with limited infrastructure-tools for economic development, the construction and proper management of tourism port facilities could prove to be of great added value, a parameter that was taken into account, when designing the strategic plan of Croatia as well as Estonia for the development of the sector.

4.2 Marina services

According to the data from the Entrepreneurship Support Center of the Municipality of Piraeus (2019) the entire Greece has a total of 154 designated ports. The largest number (62) belongs to tourist boat Shelters (40.3% share), while tourist ports - Marinas amount to 59 (38.3% share). Especially in terms of tourist ports, most of them are concentrated in the region of Attica, followed by the region of Crete and Western Greece. The tourism port sector is represented by the Hellenic Marine Association (H.M.A). Hellenic Marine Association was founded in 2010 with the aim of representing, upgrading and promoting tourist ports and marina facilities throughout the country. H.M.A members are currently 21 marinas and cover approximately 77% of the country's organized berths. The main mission of H.M.A is to change and improve the national framework for the development, operation and exploitation of tourist ports. Today, 24 private tourist ports (marinas) operate throughout the country with a total capacity of 8,471 berths. Most Hellenistic positions are found in the prefecture of Attica, occupying a 37.7% share. Positive is the contribution of the operation of the marinas to the economy, society and environment of the country, through their added value.

In particular, the sector's contribution to the creation of new jobs is important, as according to a study by the Hellenic Maritime Chamber of Shipping (2020) for every 10 berthing positions 4.4 positions are affected and another 100 positions within and in the wider operating area of the marina (professionals who are active in general with yachting), and the total number exceeds 200 if the crews of the boats are included. The sector's contribution to the economy is also significant, through the consumption of goods and services, much of which brings foreign exchange coming in from foreign yachts. The International Council of the Maritime Industry (ICOMIA) estimates that for every one euro spent on docking at a marina, between €5 and €10 are spent, depending on the size of the vessel and its operational needs (fuel, supplies, maintenance, entertainment etc.). Also important is the collection of revenue for the public from the rents paid to it by marinas and the various fees charged from pleasure boats (ICOMIA 2018). Finally, the sector's contribution to local communities is important through the responsible and quality management of a marina, but also the upgrading of Athens' waterfront through the construction of modern port facilities with environmental conditions.

After a period of decline (2011-2012), the size of the tourist port market moved upward during the period 2013-2019, with an average annual rate of 6%. The decrease that preceded the market size of the tourist ports in the previous years, according to the actors of the sector, was a result of the economic crisis and the departure of a large number of boats sold to foreign owners from the Greek marinas. In particular, in 2019 the size of the market in question showed an increase of 7.7% compared to 2018. These developments are illustrated in Figure 3.

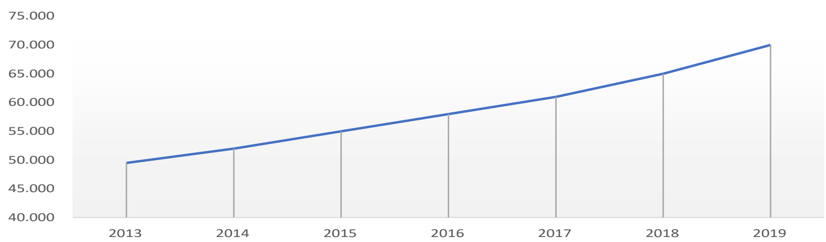


FIGURE 3. Evolution of total tourist port market in Greece 2013-2019 (Hellenic chamber of shipping 2020)

According to Hellenic Maritime Chamber of Shipping (2020) from a sample of high-capacity tourist ports of approximately 1,300 berths (in Attica and outside it), there is an increase in the average number of vessels berthed by approximately 4% in 2019 compared to 2018 and an increase in the average economy of occupancy by approximately 2.5% over the same period. Regarding the geographical structure of the size of the tourist port markets for 2018, as most Hellenistic places are located in Attica, 54% of the large markets come from the marinas of Attica, followed by the marinas of the Ionian and Peloponnese with a share of 21%.

4.3 Maritime Spatial Planning

The analysis of Dianeosis (2021) regarding tourist port service, and the existing institutional framework revealed useful conclusions about the dysfunctions of the current situation in the tourist port market in Greece. The lack of infrastructure and mainly integrated development of the network, but also institutional issues (supervision of the tourist port system, spatial planning framework, concessions process) create an environment that reduces the attractiveness of the sector for attracting investments, mainly from the private sector.

Greece, despite its extensive coastline, falls behind in the number of port infrastructures and moorings compared to other European countries and in particular to the countries of the Southern European countries. With only 0.5 berths per kilometer of coastline, Greece has a network of tourist ports with a low density, while the available port facilities are characterized by low capacity, offering an average of around 135 berths per facility.

This fact highlights the importance of forming an adequate network of tourism port infrastructures, capable of meeting both the needs of domestic demand and the country's visitors. The analysis of the data (Dianeosis 2021) revealed an important problem which limits the possibilities of exploiting the spatial network of tourist ports. This is the percentage of sited tourist port facilities that have been built and are operating. Only 22% of the designated tourist ports and 30.9% of the designated berths have been built, while in terms of tourist shelters and anchorages the percentages of construction and operation are almost zero. As a result, at planning level, a network of tourist port facilities has been formed which, under conditions, could cover at least part of the mooring needs of tourist pleasure boats, but in fact the largest part of this network has not been built.

It should be noted that in addition to the sited network of tourist port facilities, there are additional mixed-use port facilities throughout Greece that offer berths, but they have not been recorded so that they can be integrated into a wider planning of the state. Having recorded the current institutional framework for the location, construction, operation and concession of tourist port facilities, it is established that there is no overall monitoring in terms of the implementation of the legislation, but also the absence of an overall supervision of the tourist port market. The existing institutional framework, the mixing of different ministries for different functions of the port facilities serving pleasure boats combined with the multitude of different legal entities that make up the tourist ports management and operating agencies maintain a bureaucratic structure and partly market operation, a fact which is a factor reducing the attractiveness of the market for private investment (Dianeosis 2021).

4.4 Promotion of yachting services in Greece

Most companies operating in the professional yacht rental industry, in their effort to reach potential customers, take part in exhibitions held annually both in Greece and abroad. By participating in these exhibitions, companies have an opportunity to present their boats and their services and in general to be informed about the trends prevailing in the industry. Abroad, various boat shows are organized in different countries on an annual basis.

In Greece, every year in the month of May, two important exhibitions take place with the aim of the international promotion of the Greek professional maritime tourism. These are the Mediterranean Yacht Show organized in the city of Nafplio on the initiative of the Hellenic Yachting Association (H. Y. A) and the East Med Yacht Show hosted in Marina Zeas on the initiative of the Hellenic Tourist Boat Owners Association (E.P.E.S.T).

Also, the Internet is a "powerful" means of promoting yachting, as almost all companies now have their own website on the internet, through which the presentation of their fleet and services takes place. In addition to the direct sale, several commercial yacht companies cooperate with agents (brokers) both in Greece and abroad, for the fullest possible geographical coverage of the market, while finally in several cases, the personal acquaintances of the shipowner may attract clientele (Entrepreneurship Support Center of the Municipality of Piraeus 2019).

5 SWOT ANALYSIS AND STRATEGIC ASSESSMENTS

The SWOT analysis is a strategic planning tool and examines the strengths and weaknesses of a business, the opportunities and threats from the environment in which it operates, it is used by many businesses to assess their current situation in order to make decisions and thus shape their future strategy. The SWOT analysis is divided into two main parts: the analysis of the company's internal environment, which are the strengths and weaknesses, and in the analysis of the company's external environment, which are the opportunities and threats (Cabrilo & Dahms 2018).

A SWOT analysis would analyze all the elements that concern the yachting sector in Greece in order to capture the strengths and weaknesses of the internal environment as well as the opportunities and threats of the external environment. In this way it is possible to find the strategies that the industry can follow as well as the elements that make it different from others. In this way it is possible to find the strategies that the industry can follow as well as the elements that make it different from others.

5.1 Strengths

A summary of strengths can be presented as per Table 2 below.

TABLE 2. Strengths (source by the author)

Greece, a country with a strong maritime tradition, with mild weather conditions, long coastline, many islands, clean and safe seas.
Industry that attracts high-income tourists by making a decisive contribution to the economy through added value
The general port infrastructure has improved considerably in recent years.
Organized companies with a long tradition in maritime tourism are active in the sector.

Greece, with its multitude of coastlines, independent coves and islands, is ranked on a global scale as a choice of yachting destination. The country can provide an excellent combination of mild climate, unique view and short distances between the destinations. As a result, it can gradually climb higher in terms on consumer preference. Often at the docking points there is the possibility of engaging in water sports, increasing the choices of the tourists and the possibilities to get employed. Increased work traffic can be clearly observed in the summer months. But also in the winter, activities like the guarding of the premises and boats, the renewal, the maintenance and the repair of the fleet, results in a continuous flow of labor supply.

5.2 Weaknesses

In turn, a summary of strengths can be presented as per Table 3 below.

TABLE 3. Weakness (source by the author)

The chronic structural problems of Greek tourism in general (seasonality, geographical concentration, lack of support infrastructure, dependence of Greek tourism companies on international tourism organizations, etc.).
Shortages in matters of infrastructure and organizations of maritime tourism (e.g., lack of berths in general, but also for mega yachts).
The high port costs.
The bureaucracy and the time-consuming process of licensing new investments with several stakeholders.
Shortages in the training of marine crews.
Restrictions on chartering commercial vessels with a foreign flag.
Illegal yacht charters.
The lack of a national strategy of extroversion and promotion of maritime tourism - yachting inside and outside the borders

Compared to competitors, Greece has the lowest seat/coastline ratio. 75% of the marinas in the Mediterranean are covered by the facilities of Italy, Spain and France shaping the market from the side of demand and supply. In addition to physical barriers such as seasonality, there are also technical ones, which include shortages of sufficient technical and infrastructure works (e.g. modern marinas and supply points). On the other hand, all the institutions surrounding the sector must be modernized and adapted to the new tourism conditions. For example, red tape that delays the chartering and renting of a boat, increases illegal chartering and uncollected dues – taxes to the state. Another problem that exists is the lack of adequately trained crews that can adequately cope with the needs and requirements of the vessel and the charterer. Also, insufficient advertising, both in Greece and abroad, makes it difficult to promote the industry to the general public, making it a niche activity or unknown as a means of recreation.

5.3 Opportunities

In terms of opportunities, they can be summarized as per Table 4 below.

TABLE 4. Opportunities (source by the author)

Many natural and protected Bays in various Greek islands remain unused.
The modernization of the institutional framework of maritime tourism (start of registration of professional yachts).
The creation of an organized network of marinas and tourist shelters.
The modernization of competition rules with the return of incentives and funds for the purchase of a boat (leasing).
The provision of incentives for the increase of permanently moored vessels in our country.
The acceleration of the process of privatization of the tourist ports of the country.
The extension of the tourist season.
Attracting high income tourists.
The special advertisement of Greek maritime tourism, in developing tourist markets abroad.

The industry has many opportunities for improvement and expansion exuding a sense of optimism in the country's economy. The geographical location of Greece is a strong comparative advantage over competitors, also attracts large foreign companies in the area. At the same time, along the coastline of the mainland and the island country, small coves are formed, offering solutions for short stops and rest. To a small extent, the length of the coastline may have been exploited, but with the establishment of organized tourist ports, there is room for the creation new investments.

Also, this cooperation could have a positive impact to the state with private entities or even the total privatization of marinas and ports. As a result, the state apparatus is released from the high maintenance costs, creating an organized set of marinas. Also, the market in Egypt and Israel has been quite limited in recent years, due to the prevailing political situation. On the other hand, Greek waters are a safe destination that can absorb demand. Finally, yachting can derive many benefits through targeted advertising, such as attracting customers from the middle income class, and thus setting new horizons and conditions in domestic yacht charter.

5.4 Threats

In turn, a summary of threats can be presented as per Table 5 below.

TABLE 5. Threats (source by the author)

The tax measures of the state regarding the yachts (professional and private).
Intense competition from neighboring competing countries (Turkey, Croatia, France, Spain) in maritime tourism.
Refugees and Greek-Turkish relations.
High fuel prices.

It is easy to see that the recession of 2008, which started on a global scale, continues to still affect the Greek economy, still posing a threat to shipping, and more specifically to yachting tourism. In combination with the strict tax measures, individuals and professionals turn to other more favorable markets, thereby discouraging new investors. A real threat is the competition from the Mediterranean countries, which attract a large share of tourists. Countries like Turkey, France and Spain have better infrastructure and more sophisticated technical means, and visiting tourists ask for corresponding benefits also in Greece, which is unable to provide them. In recent years Turkey has provided development incentives, simplification of the investment process, new luxury marinas, as well as full utilization of coastline in depths and lengths compared to its competitors.

Despite the fact that the invoices are at a high level, the low labor costs allow the offering on high level services. An important reason for out-of-euro-zone families to turn to cheaper destinations is the exchange rate of the euro against the currencies of other countries (Entrepreneurship Support Center of the Municipality of Piraeus 2019).

5.5 The challenges

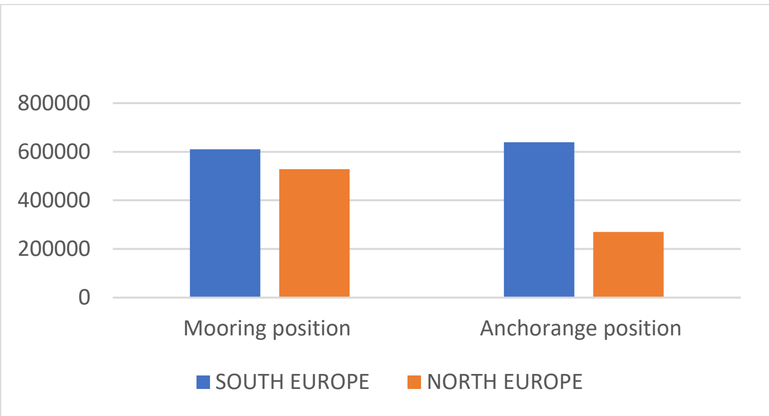
There is a number of challenges to take into consideration developments in the wider environment, in particular the dynamic development of the global yacht fleet (at least until the Covid-19 pandemic), and the fact that competition in region of Greece is constantly growing, as neighboring countries (e.g., Italy, Croatia, Cyprus, Turkey) invest in tourist ports.

Greece is called upon to formulate appropriate public policies for the further development of tourist ports. Through the appropriate strategies it could be able to follow the developments in the industry and form a competitive product, producing greater benefits and additional jobs.

Despite the favorable developments in the yacht industry - in the five years 2014-2018 the average annual growth rate of the yacht market (in terms of value) amounted to 10.45% - the tourist port facilities have not been able to adapt effectively. The most recent public investment for the creation of a new marina in the country took place in Lefkada, and was added to the country's potential in 2003. Islands that are emblematic in the Greek tourist map, such as Santorini, Mykonos and Crete either have no marina, or have infrastructure that does not keep pace with the level of the wider tourist product they have (Dianeosis 2021.)

Table 6 describes the distribution of offer of tourist port facilities of Northern and Southern Europe (sample countries).

TABLE 6. Recreational boat industry statistics (ICOMIA 2018)



Overall, the countries of Southern Europe are lagging behind in the number of tourist ports compared to the northern European countries (Table 6), but are superior in berths. There is a different approach to designing and developing a network of tourist ports between Northern and Southern Europe. There are more but smaller tourist ports in Northern Europe. A smaller number has developed in Southern Europe tourist ports with much larger capacity tourist ports.

Northern Europe may follow a network model with few (in number) central and large tourist ports and many smaller "satellite" tourist ports. In contrast, Southern European countries seem to follow a network model with many large tourist ports and fewer, medium-sized tourist ports satellites. (Dianeosis 2021.)

5.6 The main obstacles

The study at Dianeosis (2021) includes an extensive examination of the institutional framework, the spatial dimension of the existing network of zoned tourist ports and the governance of tourist ports. The analysis highlighted the fact that, at the planning level, a network of tourist port facilities has been formed which, under certain conditions, could cover a significant part of the docking needs of tourist pleasure boats, and with particular dynamics, providing sufficient geographical cover. But, in fact, the largest part of this network has not been built, it has simply been placed, in the past time and in different conditions.

It should be noted that in addition to the sited network of tourist port facilities, there are additional mixed-use port facilities throughout the territory that offer berthing positions. In this case however , there has not been the necessary recording of them in order to integrate them into the broader planning of the state. The study at Dianeosis (2021) was also enriched by the analysis of the strategy for the development of tourist ports applied in two Mediterranean countries Italy and Croatia that are competitors of Greece in the marine tourism market with pleasure boats.

Also the views of stakeholders in the yacht and marina market were recorded and analyzed as regards the improvement of the existing institutional framework but also the formulation of development proposals with the aim of increasing the competitiveness of Greek tourism ports. Based on this, it was possible to record the main obstacles to the development of tourist ports in Greece, which are summarized in Table 7.

TABLE 7. Main obstacles to the development of tourist ports in Greece (Dianeosis 2021)

Strategy	1) Deficit / Absence of strategy 2) Necessity of extending the period of maritime tourism 3) Promotion of tourist port infrastructure.
Update / Location of tourist ports	1) Lack of berths 2) Significant dispersion of tourist port facilities 3) Small size (capacity) of tourist ports 4) Lack of mega-yacht berths (length> 24 m.) 5) Lack of wintering places 6) Need to settle unlicensed infrastructure projects for tourist ports
Investments	1) Unattractive bidding process 2) Need to update an existing concession model Bureaucracy 3) Lack of financial tools 4) Need to present a coordinating body
Institutional framework	1. Necessity of improving the institutional location framework and Licensing 2. Need to replace / update elements of N.2160/93 3. Timely treatment of issues of daily operation tourist ports
Education	1. Development of education and training programs for workers in maritime tourism

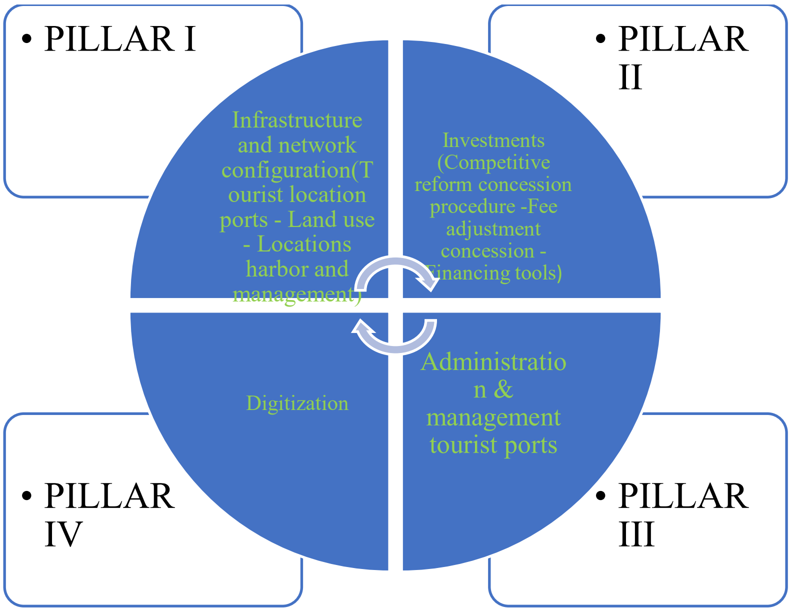
As it can be seen, Table 7 provides a picture of multiple and many-sided obstacles that could/should be tackled by strategic development measures.

5.7 Strategic Management Plan

The proposed strategic management plan (Dianeosis 2021) provides the basis for a national strategic development for tourist ports. This project should inspire to motivate the whole industry in initiatives. It is also important to link to a specific one vision - and send a message - about the characteristics of the tourist port infrastructure that Greece wants to achieve.

The proposed strategic management plan consists of four (4) pillars, with each pillar including specific, targeted actions (Dianeosis 2021). Table 8 presents a summarized picture of the basic structure and content of the plan and its pillars.

TABLE 8. The proposed strategic management plan (Dianeosis 2021)



Each of the proposed strategies is explained in policy measures. In the context of the proposed policies, two initiatives are considered the most important. First, the evaluation of the network of already located tourist port facilities. The evaluation policy can result in the formation of a network of tourist ports which will be designed, free from cases of located ports that stagnate creating obstacles to the design and implementation of a competitive network. By selecting the appropriate cases of tourist ports that can be completed in construction, the evaluation of the already located tourist port facilities, with the formulation of final proposals, can directly contribute to the final connection of a network with more adequate spatial coverage and density. Second the reform of the competitive process of the concession of tourist ports, as today there is a heterogeneity of competitive processes resulting in a negative impact on the intentions of potential investors and, consequently, healthy competition in the industry. To this end, it is proposed to adopt a specific policy, using, and utilizing positive practices from abroad (Italy), to formulate a single concessions process with specific objectives.

Also, what is needed is to first work to take initiatives to speed up the process of finalizing an integrated national special spatial framework for tourism, while in the meantime, the cooperation of the responsibilities of the Ministry - and in particular of the Ministry of Tourism - is considered expedient, necessary, and urgent. The local self-government of A and B degree, in order to evaluate and further utilize the proposals for the development of tourist port facilities which include the individual regional spatial planning plans (Vangelas & Pallis 2021).

5.8 What would Greece gain from the reform - 3 scenarios

The proposed strategic management plan to improve the structure, management and operation of the country's tourist ports can form an adequate network of tourist ports with improved performance, which will be attractive to both the users and potential investors. Under these conditions, additional economic benefits are expected to be generated locally and nationally.

Scenario 1 is the pessimistic scenario which means the case where the proposed strategy of tourist ports is not proposed and the comprehensive initiative to increase the mooring positions of tourist boats is absent. In this case there is no substantial change in the extent of the sector's contribution to the national economy and employment.

Scenario 2 is the optimistic scenario which means the case where the proposed strategic management plan is easier. Nevertheless, it creates the conditions for the construction of 15% of the total of the already located berths in the period 2022-2031. It is estimated that this scenario and during the decade 2022-2031 would create a serious financial impact of € 1,579 million. From 2031 onwards the optimistic scenario would create an annual financial impact (direct and indirect) of € 332.9 million while it would maintain about 4,652 direct jobs.

Scenario 3 is the best Scenario which means the proposed strategic management plan would be executed for the most part, making conditions for restarting the industry, increasing its competitiveness, and attracting private capital. A total of 30% of the existing sites and non-constructed mooring sites would be constructed and operated. In the whole examined period (2022-2031) the 5,164 new berths would create a cumulative financial contribution of € 2,862 million. From the year 2031 onwards, the new berths would contribute financially (direct and indirect impact) with € 602.7 million, while they would maintain 8,422 jobs. (Dianeosis 2021.)

6 SURVEY AND DATA ANALYSIS

The following are the results of the survey obtained by the questionnaire given to captains of boats that berthed in the Marina of Rhodes (PICTURE 1) during the summer of 2022. In this particular research, the focus was on the skippers - captains who hold either a license or a speedboat, emphasizing the marine tourism they carried out during the summer months of 2022. The research sample was determined according to the principles of statistical theory and the principles of academic ethics.

In particular, the research sample included more than 30 questionnaires, was representative, and had not been selected based on subjective criteria (acquaintances, friends, relatives). Specifically, the research sample was determined to include 51 people. I found difficulties from the captains in order to answer the questionnaire, either because of lack of time from their side, or because they avoided to answer, even in the cases where I assured them that their answers were confidential. Every effort was made to, on the other hand, keep the questionnaire short enough, with the aim of not tiring the respondents and not taking too much time to complete, but at the same time to serve the purposes of the research.

PICTURE 1 Marina of Rhodes

A selection of questions was made in order to extract the necessary information. Also, the format of the questionnaire was chosen in such a way that it is not easy to print and reproduce. In the future, the possibility of using an electronic way of conducting the research should be considered (Folinas & Diamantopoulos 2014). During the design phase of the questionnaire, emphasis was placed on creating a flexible data collection tool that would be able to function as a means of stimulating the discussion process, especially on qualitative information. The completion of the questionnaire by the captains who cruised during the summer months was carried out in August 2022. In addition, the average duration of completing the questionnaire was 5 minutes. The analysis of the results and the processing of the data was done with the Excel program. All questionnaire questions were analysed separately with pie charts.

The specific method (with questionnaires), was chosen since it was considered the most compatible to meet the needs of the research. Additionally, the structure of the questionnaire helped the person completing it to understand and cope with the questions. 51 questionnaires were distributed. The questionnaire can be found in appendix 1.

6.1 Weak points of yachting in Greece

Figure 4 presents the weak points of yachting in Greece and the respective percentages represented by each of them, according to the opinion of yacht users.

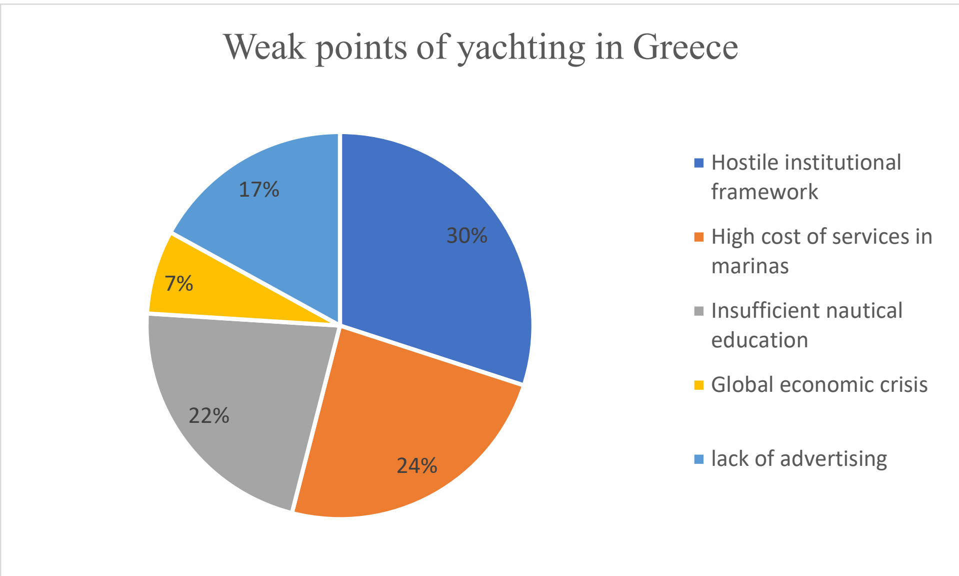


FIGURE 4. Weak points of yachting in Greece

In the first position of "negative" characteristics and with a percentage of 30%, is the hostile institutional framework that prevails in Greece for yachts. In particular, the unstable tax framework forces many shipowners to leave Greek marinas, filling up those of neighbouring countries. A typical example is the case where a foreigner with a private boat does not know, when coming to Greece, what they have to pay -extraordinary levy, special tax, mooring fees- and to which service they should pay them. All this prevents foreigners from coming to Greece, even for holidays. Next, with 24% and 22%, are the high cost of services in marinas, such as the increase in fees and the insufficient nautical education of users, while in the last positions, with lower percentages, we find the lack of advertising 17% and promotion of Greece as a key destination for yachts, as well as the global economic crisis 7%.

6.2 Existing state of the marinas and improvements to better serve users

In figure 5 the levels of user satisfaction regarding the services offered in marinas in Greece are presented.

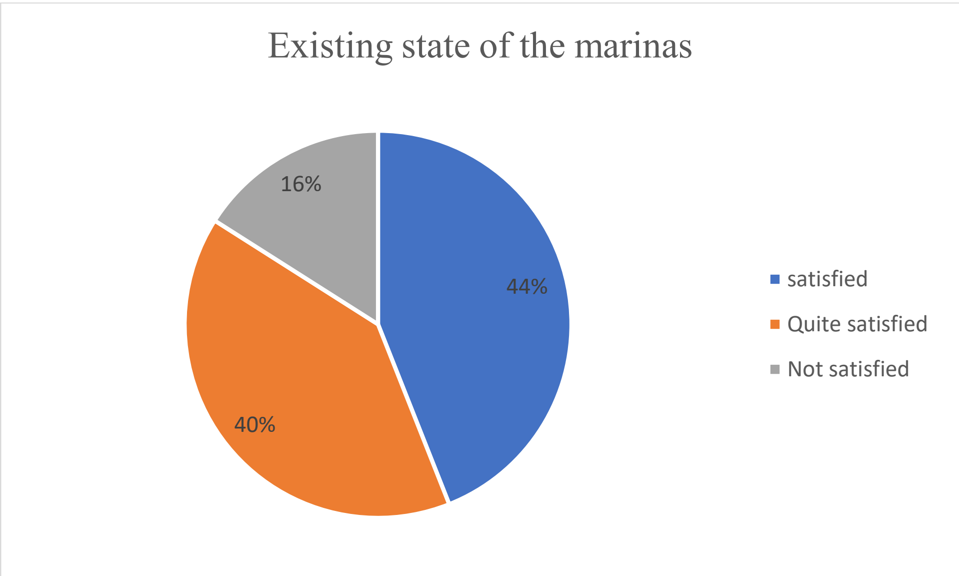


FIGURE 5. Existing state of the marinas

44% of respondents said that they were somewhat satisfied with the services provided at marinas, while 40% said they were quite satisfied with the services. Finally in the last place, 16% of users are not at all satisfied. The first important area of concern for the competitiveness of the Greek yachting sector lies in the yacht marinas, and in particular in their completeness, synchronization and safety. According to the views that have been publicly expressed from time to time by several actors in the sector, there is an important lack of sufficient number of berths.

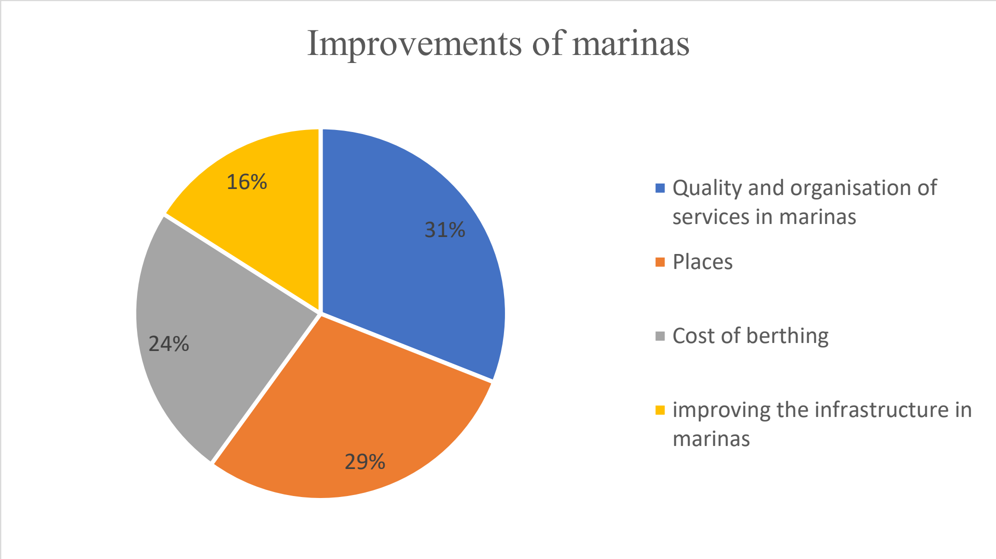


FIGURE 6. Improvements of marinas

According to figure 6, the majority of users sees as the most important factor for the improvement of marinas and their better service to be the quality and organisation of services in marinas 31%. That was followed by the places 29% and the cost of berthing 24%. Finally, 16%, of the respondents show especially that improving the infrastructure in marinas would result in a better service for them. Regarding the infrastructure that has been created in Greece, it is estimated that there are approximately 9,000 berths, while in the final stage of what there are another 9,254 berths in 79 tourist ports. Indicative is the fact that in Greece there are 0.5 berths per kilometre of coastline, while the average of the European Union, the Mediterranean and Turkey is 8.9 places per kilometre of coastline. Greece therefore, based on its coastline and the average, should have many more reception places than it actually has (Didenko, Skripnuk & Kikkas 2015).

6.3 Promotion of Greece in the yachting sector

Figure 7 shows that 58% of respondents believe that Greece is lagging behind its competitors (e.g., Turkey, Croatia) in the yachting sector in terms of marketing and promotion, followed by 42% of the respondents who consider the promotion and advertising of Greece to be "sufficient".

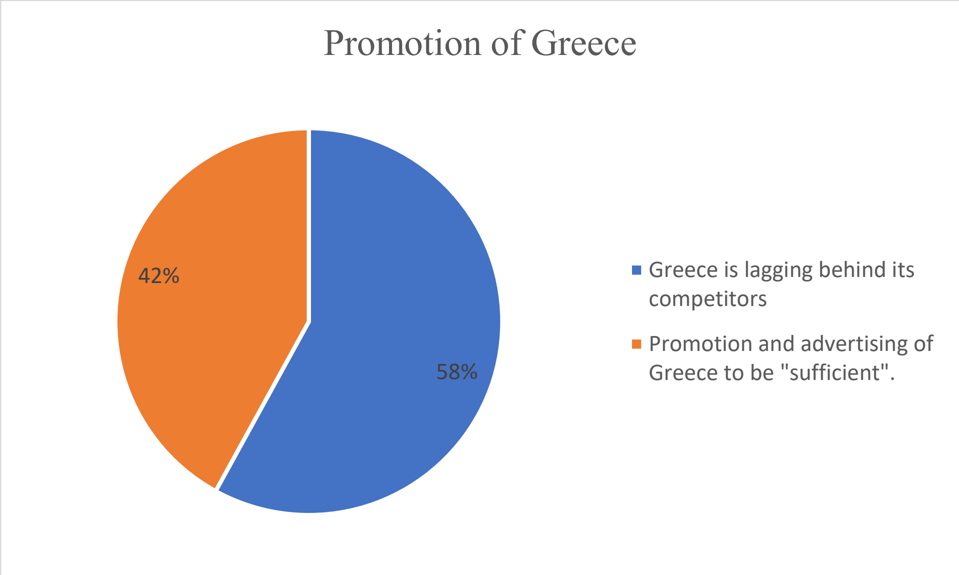


FIGURE 7. Promotion of Greece

Overall, on the basis of the results it can be observed that a small majority of the respondents saw the promotion of Greece abroad to be insufficient and lacking behind in comparison to competitors.

6.4 Development of yachting and the geomorphology of Greece

According to figure 8, the majority of respondents believed that Greece has the geomorphological characteristics that are sufficient to gain a position in the international market and 38% believed that to a fairly large extent the country will benefit from these characteristics.

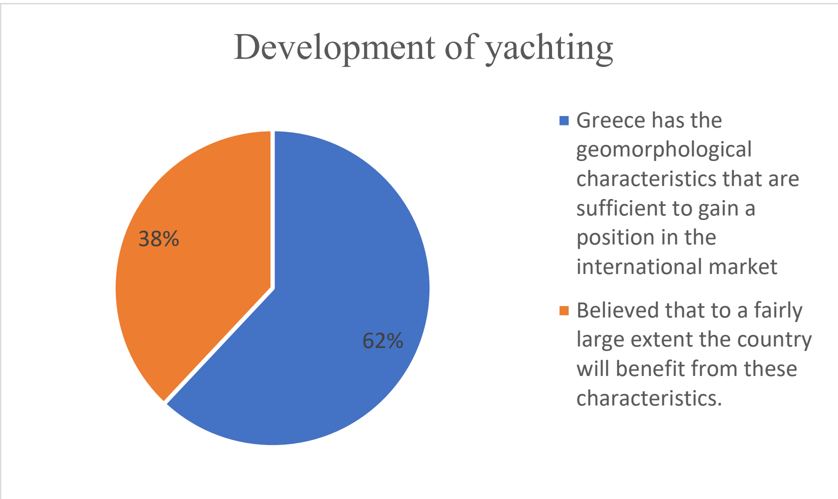


FIGURE 8. Development of yachting

A trip to the calm Greek waters, with a private or chartered pleasure boat, offers a tourist the possibility to sail between beautiful island complexes, to anchor in natural protected bays of rare beauty, to keep inaccessible beaches and to swim safely in waters of exceptional purity and clarity. Moreover, the distances between the coasts are short, while the weather conditions are equally favorable, related to the intensity of the winds and the temperatures of the environment and the sea.

6.5 Berthing facilities and services provided

As illustrated in figure 9 most respondents 73% believed that the berths available in Greece are not sufficient in relation to the number of yachts they attract, while 19% believe that they are sufficient.

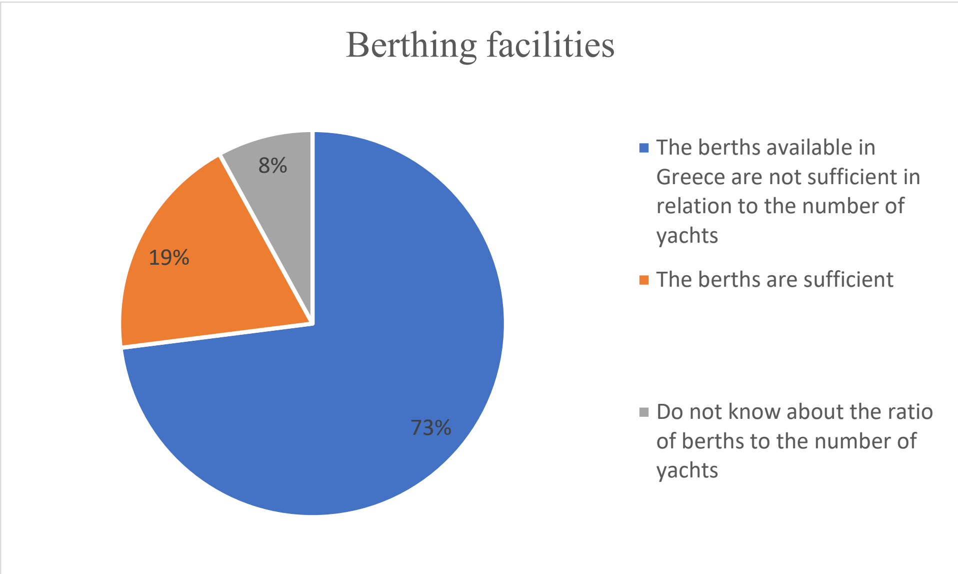


FIGURE 9. Berthing facilities

Finally, there is also a percentage of 8% who do not know about the ratio of berths to the number of yachts. Furthermore, all respondents answered no to the question of whether they consider the services provided by the berthing facilities (e.g., marinas, moorings) in the country for yachts to be adequate.

It is characteristic that the total number of organized berths in Greece, Turkey and Croatia is less than 35,000, while France, Italy and Spain have 350,000 berths, having reached a point that exceeds their carrying capacity. The importance of the creation of new berths as well as the coverage of existing berths is very important for the national economy. According to the International Council of Marine

Industry Associations (2018) every euro spent on berthing of a boat in a marina corresponds to a multiplier of 5 to 12 depending on the size and type of the boat for expenses on fuel, catering, supplies, repairs, maintenance, payroll, taxes and other needs of the vessel (ICOMIA 2018).

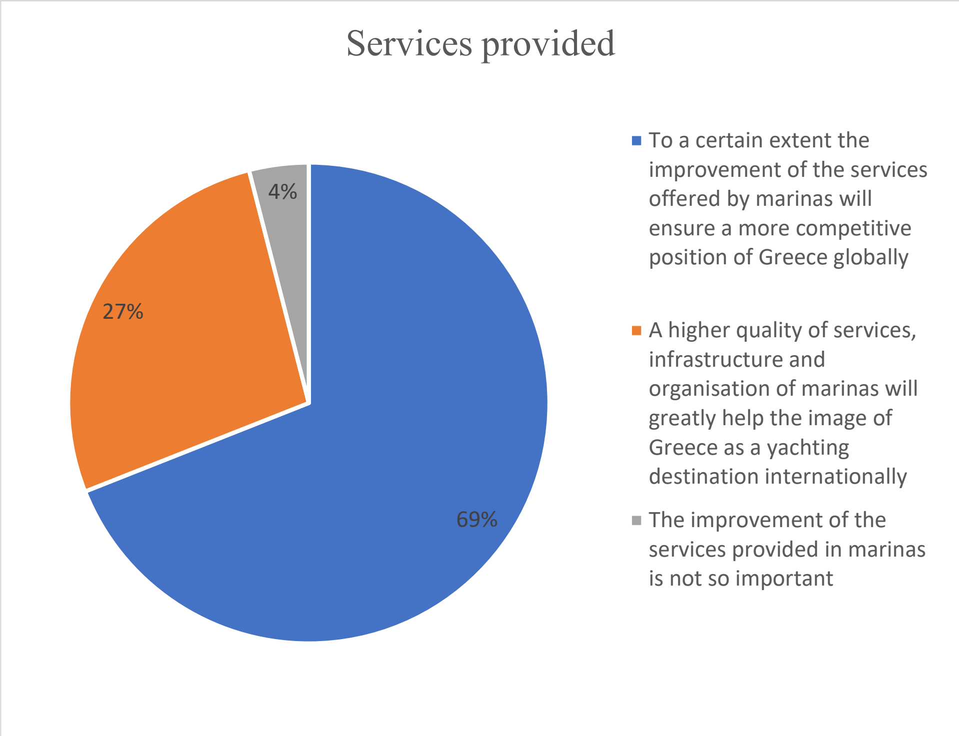


FIGURE 10. Services provided

In figure 10, the largest percentage of respondents, 69%, believe that to a certain extent the improvement of the services offered by marinas will ensure a more competitive position of Greece globally. In turn 27% of respondents believe that a higher quality of services, infrastructure and organisation of marinas will greatly help the image of Greece as a yachting destination internationally. Finally, 4% consider the improvement of the services provided in marinas not to be so important.

In addition, a decisive role in the development of the sector is played by the infrastructure and the quality of the services provided by the tourist ports. Marinas are usually also called recreation ports , with special structures to serve 500 - 2000 boats recreation on a daily basis. The organized ones have mooring positions, security services, repair areas, post offices, parking and recreation areas, commercial department store, customs office, gas station, waste collection & biological treatment station, port authority & administration offices. However , the marinas of Greece fall short of the marinas of other European countries, not having the above facilities or having them incompletely organized. In recent years, marina managers have realized the necessity of modernizing their infrastructure, but also managing it more efficiently, improving their overall services and becoming competitive.

6.6 Institutional framework of yachting in Greece

According to figure 11, a majority of respondents (66%) believe that the institutional framework in Greece for yachting directs both Greek and foreign tourists to dock their boats in marinas of other countries, such as Turkey, Croatia, Montenegro, while a small percentage of 19% answer no, and 15% answer that they do not know.

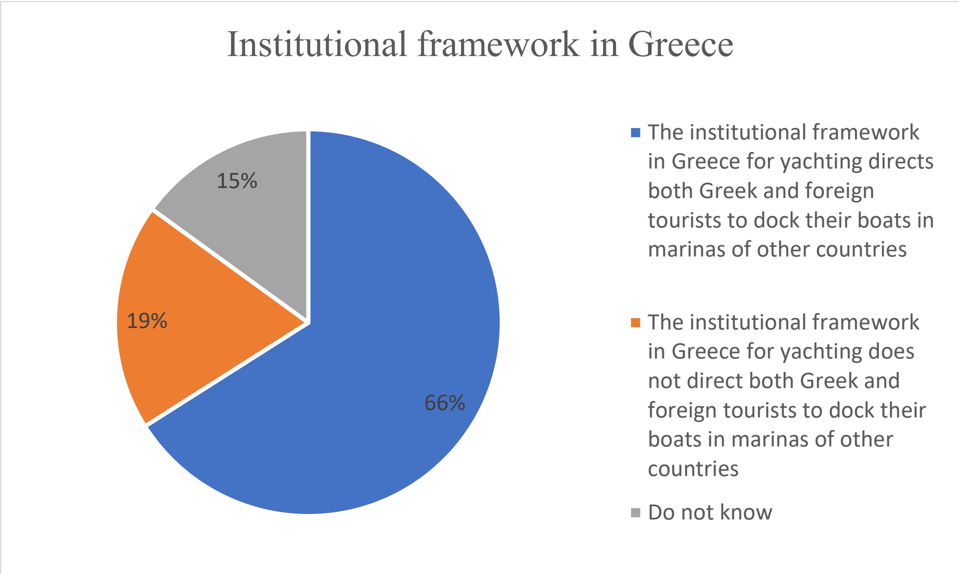


FIGURE 11. Institutional framework in Greece

It is recognized by professionals, while the prospects for the development of the sector are excellent, that the difficulties were and still are many and varied. The main problem is that the contribution of the state to the enforcement and the development of the sector has not been satisfactory to the required extent. Greek tax policy has done little to help the commercial boat as an economic unit. Thus, in the last years, Greek yachting has not been able to aim the rise of tourism, even though Greece is a safe destination. It should also be pointed out that while in Greece the commercial vessel is constantly burdened, in Turkey vessels with the Turkish flag have a 50% discount on the cost of approaching the country's ports while at the same time the banks give great incentives for fleet renewal. A big problem of Greece is the imposition of 24% VAT on the offered yachting services, which makes the Greek-owned ships very expensive and puts them out of competition. Characteristic of this situation is that the fiscal punishment suffered by the "boatmen" makes them often leave for the marinas of Turkey and

Croatia. A consequence of the high VAT is also an increase in the number of vessels berthing, with Greece among the most expensive countries (HPYOA 2020).

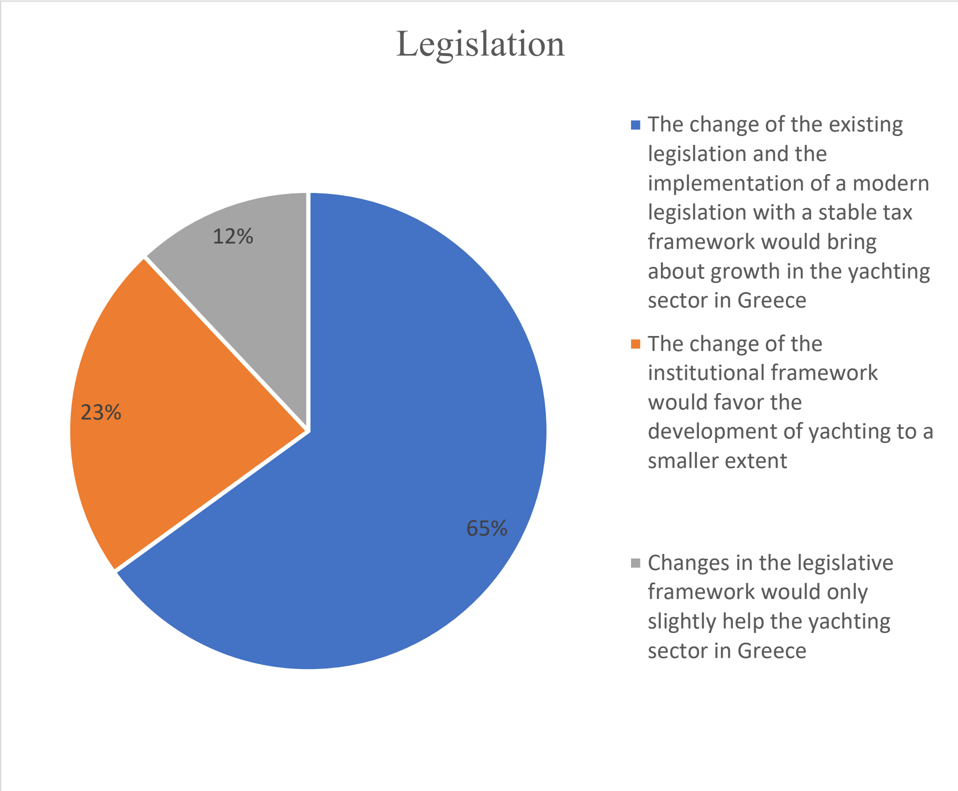


FIGURE 12. Legislation

According to figure 12, 65% of the respondents believed that the change of the existing legislation and the implementation of a modern legislation with a stable tax framework would bring about growth in the yachting sector in Greece, while 23% believed that the change of the institutional framework would favor the development of yachting to a smaller extent. Finally, a small percentage 12% argued that changes in the legislative framework would only slightly help the yachting sector in Greece.

Another major problem that inhibits investment in the yachting industry is the fiscal and institutional framework that is particularly unstable, unable to identify a certainty of stability of at least five years for potential investors. Therefore it is observable that a change of government or minister of shipping, may also lead to change in the corresponding legislation and the regulatory framework. As a consequence potential investors are moving away from Greece, and turn to countries with a more attractive investment framework. In addition, it is observed that many boats are private and have some exemptions declared as professional, others collect fares without being declared and evade taxes, while there are also not a few cases of boats that anchor in a tourist port and do not pay the prescribed fees.

All these issues can be seen as a result of the incomplete organization and coordination of the agencies involved (HPYOA 2020).

7 CONCLUSIONS AND DISCUSSION

Based on the empirical part of the thesis, i.e., the research conducted in the marina of Rhodes with the captains that have visited ports mainly in the region of Attica, but also based on the secondary information covering also other parts of Greece, some basic conclusions and discussion questions emerge.

The institutional framework prevailing in Greece, as well as the high cost of services provided by marinas, are the main points where yachting in Greece lags, according to the answers given through the completion of questionnaires by a sample of 51 people. The survey shows that both users and owners of recreational crafts are not satisfied with the marina facilities, with the main weaknesses being the organization and services provided, as well as the costs and berths. The issue of advertising and promotion of Greece as a destination for yachting tourism is a key problem. Still, the achievements here could favour the development of yachting in the country, and most respondents believed that targeted and continuous action on advertising issues would help to ensure the position of Greece as a key and safe destination in the yachting sector. Moreover, the survey showed that the geomorphological characteristics of the country are sufficient to secure a position in the international market, while the appropriate exploitation and utilization of these geomorphological elements (natural landscape, geomorphological wealth, long coastline) would help to achieve future growth of yachting tourism in Greece.

Another equally important element that contributes to the non-development of this type of tourism in Greece is the inadequacy of berths in marinas and the high cost of berthing yachts. Ensuring a higher quality of services, infrastructure and organization of marinas would help Greece's image as a yachting destination internationally, offering it a more competitive position globally. The aim should be to organize a network of marinas, shelters and hotel harbors that would meet the existing demand and modern needs of yachting. The lack of specialized teams to provide high quality technical services is also not conducive to the development of yachting in our country, so the issue of education and training of all those involved should also be explored. Therefore, in addition to the infrastructure that undoubtedly needs to be created or improved, investment in human capital is also an important area for the competitiveness of the country's tourism product.

An important step for the improvement of the services provided and the competitiveness of Greek yachting is the intervention of the state in matters of hotel training of crews as well as the provision of similar training and certification of skippers of sailing vessels. Moreover, as it was concluded in the theoretical part of the study, the research showed that the institutional framework in Greece for yachting is turning both Greek and foreign tourists to dock their boats in marinas of other countries, such as Turkey, Croatia, Montenegro. The prospects, however, of Greek yachting tourism are many. The measures that need to be taken to improve the current situation in marinas, line the change of the tax system and the institutional framework, the promotion and advertising of Greece as a yachting destination, would be able to help the country to gain new prospects in the development of this type of tourism.

7.1 Prospects for further development

Greek yachting could contribute to the increase of the country's revenues, the promotion of the Greek islands abroad and the creation of jobs. In other words, by utilizing and improving all those elements that Greece has, it can become a global center of marine tourism and capable of competing with other countries that are active in the yachting industry. Greece is considered one of the safest countries in the world, and it is also one of the few that possess characteristics like Polynesia, and long coastline and it may be an opportunity for the country to exit the crisis.

First, there should be radical and rapid changes to the existing legislation and implementation of a modern one with a stable tax framework, since, as mentioned in the previous chapter, many moored vessels have left Greek marinas due to the unstable tax system.

Also, there should be a better organization and improvement in the services and infrastructure offered by marinas as well as easier establishment of a marina (less bureaucracy), while with the implementation of an advertising campaign, there will be promotion of Greece as a key destination for yachting tourism.

Finally, through the appropriate advertising promotion of the country, the logic of the negative characterization of "scavengers" could be eliminated, so that the professionals of the sector would be free to do their work. In conclusion, to support yachting in Greece, it is essential that the public sector (the state has the responsibility for decisions and planning by setting rules and exercising control) and the private sector (the business sector is responsible for implementing the tourism policy) cooperate in order to maximize the benefits for the national economy. The balanced development of the network of tourist ports will help to promote regional development on the one hand and improve the country's tourism product on the other.

However, the implementation stage requires, in addition to the overall assessments for each region, specific analyses to reflect the specificities of each island and coastal destination separately, as well as the degree and scale of development of a particular marine tourism activity. In the advertising campaign for Greek yachting tourism, emphasis should be placed on the thousands of islands that the country includes and its climate, since in no other country in the world does the summer season have such a long duration.

Following on from this research, issues that could easily arise for further research by other researchers, is the combination of yachting tourism offered in Greece, with other tourist activities offered by the islands, such as ecotourism or adventure tourism (diving, water sports), so that tourists can get to know elements of the culture of Greece. Closing the main proposals for the development yachting industry in Greece, we must not forget that apart from the aforementioned internal issues that can be regulated, the country must be advertised and to be promoted internationally by all reasonable means. It is not enough for only a few countries to know Greece, but to open up to new markets that can become “clients” of the country in yachting.

Therefore, the promotion of our country abroad aims both to give the present to their existing customers by constantly emphasizing the beauties, organization and advantages of our country, and to attract new tourists and investors who may ignore Greece or have not been fully informed about the possibilities it offers to marine tourism. Also, the combination of yachting with marine tourism institutions, such as the organization of the Aegean Regatta, i.e., events that combine nautical sports, sailing and the promotion of the special characteristics of the island area could provide added value. The yachting sector is an integral part of Greece and therefore continuous research should be carried out to further develop the maritime activities that take place there.

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APPENDIX 1: SURVEY QUESTIONNAIRE

Questionnaire

1) What, in your opinion, are the "weak points" of yachting in Greece?
□ High cost of services (e.g., increase in marina fees).
□ Inadequate nautical education / wrong tourist mentality.
□ Insufficient advertising and promotion of Greece as a key destination for yachts.
□ Hostile institutional framework for yachts (e.g., private yachts are subject to a special tax for stays of more than 40 days in port).
□ Global economic crisis (e.g., imposition of extraordinary taxes).
□ Other..

2) Are you satisfied with the services provided in the marinas?
□ Very
□ Quite
□ A little
□ Not at all
□ I do not know / I do not answer

3) What improvements would you like to see in the marinas to better serve you?
□ More berths
□ Lower berthing costs
□ Services of higher quality and organization
□ Better infrastructure
□ Other...................

4) Do you think that our country lags in marketing and promotion compared to its competitors (e.g., Turkey, Croatia) on the issue of yachting?
□ Very
□ Quite
□ A little
□ Not at all
□ I do not know / I do not answer

5) In your opinion, does Greece, have the characteristics (e.g., Polynesia, geographical location), to conquer an important position in the yachting market worldwide?
□ Very
□ Quite
□ A little
□ Not at all
□ I do not know / I do not answer

6) Do you consider the services provided by the docking facilities (e.g., marinas, anchorages) in our country for yachts to be adequate?
□ Yes
□ No
□ I do not know / I do not answer

7) Do you believe that by ensuring a higher quality of services, infrastructure and orheaaganization in marinas, Greece will secure a more competitive position compared to other competing countries?
□ Very
□ Quite
□ A little
□ Not at all
□ I do not know / I do not answer

8) Do you think that the institutional framework in Greece regarding yachting is turning many shipowners to neighboring countries?
□ Yes
□ No
□ I do not know / I do not answer

9) Would the implementation of modern legislation on marine tourism encourage the development of yachting?
□ Very
□ Quite
□ A little
□ Not at all
□ I do not know / I do not answer