

Trends and preferences for international travel from Greece's source markets in Europe and the USA (Emphasis on Sun & Beach and City Break trips)

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1. Introduction

The dramatical change in conditions for travel and the restrictions imposed to contain the pandemic in and of themselves have affected the nature of travel markets to a great degree, particularly in relation to international travel. Endeavouring to support the recovery of tourism activity in Athens and help tourism enterprises and agencies adapt to the new conditions, the City of Athens assigned to INSETE the 'Action to Inform and Raise Awareness of members/tourism enterprises regarding new market parameters and needs: Flexible and specific information for agencies and enterprises. Targeted and organized distribution of entrepreneurship data', with MIS 5083736.

As part of this action, Censuswide Ltd was awarded a contract on 26/07/2021 to carry out primary research in eight of the most significant markets for Greek tourism (Germany, the United Kingdom, France, Italy, Austria, Switzerland, the Netherlands and the USA) to identify the characteristics of the modern-day traveller under current conditions and thus enable the best penetration of these markets. The results of the survey are presented in this issue. Aside from a general section, the survey included two specific sections related to the main products of inbound tourism to Athens: City Breaks and Sun and Beach tourism.

2. Methodology

The study presents and analyses the results of a web-based survey conducted by Censuswide for INSETE with subjects aged 17 and older in the second half of September 2021. The survey focused on potential travellers over the next 12 months and on their travel behaviour. To ensure the sample concentrated on potential travellers to Greece, subjects were selected from amongst those who travelled abroad by air on holiday at least once between 2017 and 2020. Specifically in relation to the USA, subjects were selected from amongst those who travelled on holiday outside North America at least once between 2017 and 2020. The responses represent all travellers from each country included in the sample and not only those who expressed interest in or planned to travel to Greece.

The sample sizes by country were: Germany 1,002, United Kingdom 1,002, France 1,001, Italy 1,005, Austria 703, Switzerland 705, the Netherlands 701 and the USA 1,001.

3. Key Results

Survey profile and objectives

The survey aimed to identify the characteristics of the modern-day traveller in the current circumstances and covered eight of the most significant markets for Greek tourism (Germany, the United Kingdom, France, Italy, Austria, Switzerland, the Netherlands and the USA), which in 2019 contributed 58% of revenues, 53% of nights spent and 44% of inbound tourism arrivals in Greece.

In addition, the survey focused on actual potential travellers to Greece, and did not take account of citizens who did not travel abroad even before the pandemic. For the European markets specifically, the sample was selected from those who travelled abroad on holiday by air at least once between 2017 and 2020. For the USA, subjects were selected from amongst those who travelled on holiday by air outside North America at least once between 2017 and 2020.

The survey was conducted by Censuswide for INSETE with subjects aged 17 and older during the second half of September 2021. The total survey sample included more than 7,100 subjects comprising approximately 1,000 people in Germany, the UK, France, Italy and the USA and about 700 in Austria, Switzerland and the Netherlands.

General findings

Though the overwhelming majority of respondents intended to travel abroad in the next 12 months, a significant number –ranging from 1-in-7 in Austria and Switzerland to 1-in-4 in the United Kingdom– said they would remain within their country.

In reviewing those who stated their intent to travel abroad:

- the Sun and Beach product was the most popular in most markets, followed by City Breaks. In Italy and the USA, the reverse was true;
- Spain was the 1st choice for 5 out of the 8 countries being analysed (UK, Germany, France, Italy and the Netherlands);
- the strong Greek tourism brand was reaffirmed, as Greece (along with the much larger countries and economies of Spain, Italy, France, Germany and the UK) is in the top-10 European destinations for all markets being examined. The highest place Greece held as

- a destination was 2nd in the Italian market, and it ranked 3rd in the British, German and French markets, and 5th in the Austrian market;
- for all markets, the highest share held by the most popular destination was 12% (Spain in the Dutch market) and the lowest was 7% (Spain in the UK market). This indicates a significant dispersion of desirable destinations;
 - significant variations emerged among individual markets in regard to the month of departure for their next trip. The Germans, French, Italians, Austrians and Dutch placed higher priority on summer holidays (peaking in August for the first three and July for the other two), while the British, Swiss and Americans chose the upcoming months up until March, peaking in November for the British, December for the Swiss and January and March for the Americans;
 - the cost of the journey once again constituted the main factor influencing the trip for the markets of France, Germany, Austria and Switzerland. Conversely, for the markets of the UK, Italy, the Netherlands and the USA, higher priority was given to factors related directly to the pandemic (travel restrictions/quarantines and epidemiological situation at the destination). In all countries, the rate of those stating there was nothing that would influence their travel plans was zero or minimal (<4%);
 - significant differences emerged among individual markets in terms of the average length of stay. However, trips of limited duration (3-7 nights spent) were the most frequent choice. Germany, France and the Netherlands showed the relatively higher frequency of trips with more than 10 nights spent.

Findings related to international trips for Sun and Beach

A review of preferences expressed by those stating they intended to travel abroad for Sun and Beach indicated:

- significant variations among individual markets in regard to the month of departure for their next trip. Sun and Beach holidays for summer of 2022 were a priority for the Germans, French, Italians, Austrians, Swiss and Dutch, while the British and American respondents preferred the upcoming months up until March. The highest percentage of undecided responses as to the time of travel was in the Netherlands (9%) and the lowest (0%) in the USA;
- the peak preference month for the Germans, Austrians, Swiss and Dutch was July, with 18%, 25%, 17% and 20%, respectively, while the British mostly preferred November, with 13%, and the Americans preferred October, with 19%;

- though there were significant differences among individual markets in relation to average length of stay, trips of 3-7 nights spent were the most common preference in all markets. On the other hand, Germany, France and the Netherlands indicated a preference with significantly high frequency (31%, 32%, 30%, respectively) for trips with more than 10 nights spent. They were followed by Switzerland, Austria and Italy, with 22%, 21% and 14%. As seen above, all six of these countries prefer summer holidays. The segment of British travellers who would take a holiday of at least 10 days is 13% and just 3% of Americans; both these markets would opt to go on holiday in the upcoming months up until March;
- the predominant choice of accommodation was 4- or 5-star hotels for Germany, France, Italy, Austria, Switzerland and the Netherlands, while for the UK and the USA the first choice was 3-star hotels and 1- or 2-star guest houses/hotels, respectively. The results for the UK and the USA, in contrast to other data indicating that travellers from these two countries coming to Greece prefer 4- and 5-star hotels, imply that Greece attracts the upmarket clientele from these countries. A strong preference in all markets was short-term rentals, ranging from 17% for the Netherlands to 36% for the USA, while between 13% (Italy) and 20% (USA) said they also preferred to stay with friends and relatives;
- Sun and Beach holidays are not monothematic; on the contrary, travellers seek a variety of activities, with a high frequency that in some cases exceeds 50%, that range from visits to the city and cultural activities to excursions and concerts or theatre performances. The interest in more diverse activities seems to be particularly great in Germany, France, Italy, Austria and the Netherlands, and is less evident in Switzerland, the UK and USA. This means that a successful Sun and Beach destination must satisfy a broad range of desires and not limit itself to just the beach and the sea.

Findings related to international trips for City Breaks

A review of preferences expressed by those stating they intended to travel abroad for a City Break indicated:

- significant differences among individual markets with regard to the month of departure, with the majority of British, French and American respondents saying they intended to travel within the next six months, up to February, while the majority of Germans, Italians, Austrians, Swiss and Dutch preferred March or later. The highest percentage of undecided responses as to the time of travel was in the Netherlands (16%) and the lowest (0%) in the USA;

- notable differences were also apparent among individual markets in regard to the average length of stay, with trips of 3-7 nights spent being the most frequent choice. France and Italy presented a relatively higher frequency in trips with more than 10 nights spent, with 13% each. In no other market does this rate exceed 7%;
- with regard to the preferred City Break accommodation,
 - o the predominant choice of accommodation for a holiday was 4- or 5-star hotels for the United Kingdom, Austria and the Netherlands, while
 - o for Germany and Switzerland, 3-star hotels were just as popular;
 - o conversely, 3-star hotels were the most popular for France and Italy.

For the USA, the top choice was the guest house and 1- or 2-star hotels. It should be taken into account that most trips from the USA are very short (53% are up to 4 nights spent) and –most likely– to nearby countries where expenses would be far lower than for a transatlantic holiday trip to Greece or to some other European destination where they generally stay in more expensive accommodation;

 - o short-term rentals were very strong in all markets – interesting to 1-in-4 in the Netherlands and up to 2-in-5 in the USA;
 - o the rate of those with no preference is negligible – up to 3% maximum;
- travellers frequently sought a large variety of activities in the city (e.g. walking, dining, shopping) or outside the city (e.g. excursions, athletic activities). In some cases, the desire exceeded 50% while, for all markets and activities, the rate of those who wished to participate in some kind of activity exceeded 10%. In other words, a successful City Break destination should satisfy a broad range of desires;
- the markets of Germany, France, Austria and the Netherlands presented a similar overall picture of their preferences for recreational products on a City Break trip, with particularly strong interest in city walks, sightseeing, shopping and eating out. A smaller –but not small– interest in a variety of activities was also expressed by the markets of the UK, Switzerland and the USA.

4. Appendix

Countries	Receipts (mil. €)		Arrivals (thousand)		Overnights (thousand)	
Germany	2.959	17%	4.026	13%	37.313	16%
UK	2.564	15%	3.499	11%	30.349	13%
France	1.090	6%	1.542	5%	12.946	6%
Italy	1.009	6%	1.553	5%	12.609	5%
Austria	462	3%	583	2%	5.132	2%
Switzerland	462	3%	540	2%	4.851	2%
Netherlands	534	3%	818	3%	7.573	3%
USA	1.188	7%	1.178	4%	12.457	5%

Source: Bank of Greece - Processing: INSETE Intelligence

Travel Abroad	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
None	21%	24%	22%	20%	14%	14%	19%	19%
At least 1	79%	76%	78%	80%	86%	86%	81%	81%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Sun and Beach trip	41%	28%	36%	27%	45%	31%	40%	19%
City Break	26%	22%	15%	39%	32%	27%	28%	21%
Touring	13%	16%	21%	13%	13%	21%	18%	21%
Cruise	10%	16%	8%	11%	8%	14%	8%	18%
Wellness Holiday	14%	18%	22%	13%	16%	18%	15%	19%
Nature oriented holiday	15%	18%	14%	14%	15%	23%	16%	21%
Other	2%	1%	1%	1%	1%	1%	1%	0%
N/A; I am not likely to engage in any type of trip in the next 12 months	4%	3%	4%	2%	0%	1%	1%	1%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Spain	9%	7%	12%	12%	9%	10%	12%	8%
Italy	8%	5%	11%		11%	10%	10%	6%
Greece	8%	6%	8%	9%	8%	6%	6%	4%
France	7%	6%		9%	6%	9%	7%	9%
Germany		5%	5%	7%	11%	10%	7%	7%
UK	4%		6%	9%	3%	7%	5%	8%
Portugal	4%	5%	8%	5%	3%	6%	5%	
Croatia	6%	4%	4%	4%	11%	3%	3%	
USA	4%	5%	6%	6%	3%	6%	4%	
Netherlands	7%	5%	3%	4%	3%	4%		
Turkey	7%	5%	3%		6%	3%	6%	
Austria	6%	5%	2%	4%		7%	5%	
Switzerland	4%		3%	4%	4%		2%	4%
Ireland		5%	3%	4%			1%	4%
Tailand		4%	4%		3%	4%		3%
Belgium	2%	4%	4%			1%	7%	
Hungary	3%	4%		2%	4%	2%	2%	
Canada		4%	3%			1%		6%
Denmark	4%	4%		2%	1%	2%	2%	
Other	1%	1%	4%	2%	2%	1%	3%	0%
India		5%						5%
Egypt	3%			4%	2%			
Czech republic	3%			2%	3%		1%	
Puerto Rico								7%
Morocco			5%				4%	
Sweden	4%					3%	2%	
China			1%					4%
UAE		4%				2%		
Jamaica								5%
Slovenia				2%	3%			
Dominican Republic								4%
Bahamas								4%
Norway	2%					2%	2%	
Cyprus		5%						
Poland	3%				1%			
Costa Rica								4%
Japan								3%
Mexico								3%
San Marino				3%				
Malta				3%				
N/A	1%	0%		1%		0%	1%	0%
Albania				2%				
Tunisia			2%					
Philippines								2%
Andorra			1%					
Slovakia					1%			

Source: INSETE Intelligence

		Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
2021	September	2%	3%	2%	1%	2%	1%	2%	4%
	October	8%	10%	5%	5%	7%	5%	9%	10%
	November	6%	12%	6%	6%	8%	8%	10%	9%
	December	9%	11%	8%	9%	7%	12%	11%	10%
2022	January	7%	9%	5%	8%	6%	10%	5%	11%
	February	7%	10%	7%	7%	6%	11%	5%	9%
	March	8%	9%	6%	8%	8%	11%	5%	11%
	April	8%	7%	9%	7%	7%	9%	7%	9%
2022	May	7%	7%	8%	7%	7%	9%	7%	9%
	June	9%	7%	9%	9%	9%	6%	7%	7%
	July	11%	6%	12%	11%	14%	8%	13%	5%
	August	11%	5%	15%	14%	12%	5%	8%	3%
N/A	8%	4%	7%	7%	5%	4%	11%	0%	

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Cost of trip	45%	33%	49%	41%	45%	40%	35%	28%
Travel restrictions / quarantine	40%	34%	41%	43%	44%	38%	38%	31%
Epidemic situation in destination	35%	34%	40%	49%	37%	37%	29%	31%
Safety	33%	26%	25%	30%	28%	34%	25%	30%
Being vaccinated	26%	30%	20%	23%	27%	32%	27%	31%
Availability of direct flights	21%	28%	22%	22%	24%	29%	19%	32%
Cancellation policy	20%	26%	22%	24%	22%	22%	22%	31%
Compulsory Covid test(s) cost	17%	30%	17%	16%	17%	24%	20%	29%
N/A; nothing would influence my travel plans / decisions	0%	2%	4%	2%	2%	0%	2%	0%

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
1	2%	1%	1%	1%	2%	1%	1%	5%
2	4%	4%	3%	3%	4%	5%	5%	11%
3	7%	10%	5%	8%	12%	11%	11%	15%
4	9%	13%	7%	10%	12%	15%	11%	17%
5	11%	15%	8%	13%	13%	16%	11%	13%
6	8%	17%	9%	12%	11%	13%	7%	13%
7	16%	17%	19%	18%	18%	12%	13%	10%
8	9%	7%	7%	8%	5%	6%	9%	7%
9	6%	4%	3%	6%	3%	5%	5%	4%
10	10%	4%	10%	8%	7%	5%	7%	2%
>10	17%	6%	25%	11%	12%	10%	18%	2%

Source: INSETE Intelligence

Sun and Beach

		Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
2021	September	2%	2%	3%	1%	1%	3%	1%	8%
	October	7%	13%	4%	3%	6%	6%	10%	19%
	November	3%	13%	6%	6%	4%	6%	8%	15%
	December	7%	8%	6%	5%	3%	14%	9%	9%
2022	January	5%	6%	3%	7%	3%	9%	4%	10%
	February	3%	10%	6%	6%	3%	7%	3%	8%
	March	6%	10%	6%	5%	4%	6%	2%	14%
	April	5%	6%	8%	3%	3%	5%	7%	4%
2022	May	7%	8%	8%	6%	7%	8%	7%	3%
	June	14%	7%	9%	14%	14%	6%	10%	4%
	July	18%	5%	14%	15%	25%	17%	20%	3%
	August	17%	8%	22%	24%	21%	9%	10%	3%
	N/A	7%	4%	6%	5%	5%	5%	9%	0%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
1	1%	2%	0%	0%	1%	1%	0%	8%
2	1%	5%	1%	0%	2%	3%	2%	19%
3	3%	9%	2%	4%	3%	5%	4%	15%
4	7%	9%	4%	7%	5%	7%	5%	16%
5	6%	11%	6%	7%	11%	17%	6%	14%
6	6%	15%	8%	17%	11%	11%	5%	11%
7	15%	24%	22%	26%	24%	15%	17%	7%
8	7%	3%	8%	6%	5%	5%	11%	5%
9	5%	3%	3%	6%	3%	5%	6%	2%
10	15%	5%	11%	9%	12%	8%	12%	1%
>10	31%	13%	32%	14%	21%	22%	30%	3%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Hotel 4* or 5*	59%	40%	54%	50%	61%	50%	66%	23%
Hotel 3*	28%	46%	33%	36%	24%	39%	30%	38%
Hostel or Hotel 2* or 1*	13%	29%	8%	14%	11%	17%	6%	45%
Short Term Rental	20%	27%	27%	29%	22%	33%	17%	36%
Friends or relatives - free	15%	15%	17%	13%	14%	18%	14%	20%
Other	3%	4%	5%	1%	4%	3%	4%	1%
N/A – no preference	2%	2%	2%	2%	2%	0%	2%	1%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Walking around the city	45%	34%	55%	54%	48%	37%	46%	26%
Shopping	42%	28%	39%	38%	44%	33%	44%	22%
Go out in the evening to restaurant	41%	34%	59%	60%	50%	38%	47%	25%
Visiting sights/attractions	38%	30%	44%	47%	39%	36%	33%	27%
Take an excursion out of the city	37%	29%	38%	37%	37%	28%	31%	25%
Go out in the evening to pub/bar	35%	31%	35%	47%	38%	29%	39%	25%
Go on an organised tour	23%	26%	21%	24%	24%	19%	20%	24%
Visiting a night-club/disco	22%	22%	21%	25%	27%	24%	23%	24%
Taking part in a sporting activity	20%	22%	22%	21%	23%	22%	15%	26%
Visiting exhibitions	15%	23%	9%	18%	15%	16%	12%	25%
Visiting museums	14%	22%	21%	22%	18%	18%	17%	23%
Going to concerts	14%	20%	19%	18%	17%	22%	14%	23%
Going to the theatre	11%	19%	9%	11%	12%	17%	12%	24%

Source: INSETE Intelligence

City Break

		Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
2021	September	2%	3%	1%	1%	1%	1%	3%	7%
	October	9%	6%	9%	6%	6%	6%	13%	9%
	November	8%	11%	14%	7%	13%	10%	9%	13%
	December	11%	10%	14%	12%	10%	15%	12%	14%
2022	January	6%	9%	8%	8%	5%	11%	3%	15%
	February	8%	10%	6%	5%	5%	11%	8%	7%
	March	10%	14%	5%	10%	11%	13%	7%	13%
2022	April	8%	7%	11%	9%	11%	7%	4%	7%
	May	8%	6%	11%	6%	9%	9%	7%	7%
	June	5%	7%	5%	8%	7%	5%	5%	3%
	July	5%	5%	9%	7%	7%	3%	7%	3%
	August	7%	6%	3%	11%	7%	3%	6%	3%
	N/A	12%	7%	5%	9%	6%	7%	16%	0%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
1	1%	2%	1%	1%	1%	2%	3%	5%
2	8%	6%	10%	4%	7%	6%	7%	13%
3	14%	15%	17%	12%	20%	19%	21%	20%
4	11%	16%	14%	14%	16%	22%	14%	15%
5	15%	15%	11%	19%	16%	12%	16%	10%
6	10%	15%	8%	9%	9%	11%	8%	13%
7	15%	11%	11%	16%	17%	10%	8%	8%
8	8%	5%	6%	3%	3%	4%	7%	8%
9	5%	5%	3%	2%	2%	5%	3%	4%
10	6%	3%	5%	6%	3%	4%	3%	3%
>10	5%	4%	13%	13%	5%	5%	7%	0%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Hotel 4* or 5*	35%	43%	38%	40%	46%	43%	46%	22%
Hotel 3*	34%	39%	44%	44%	39%	43%	37%	31%
Hostel or Hotel 2* or 1*	24%	36%	19%	16%	14%	21%	15%	41%
Short Term Rental	30%	33%	36%	30%	32%	32%	25%	38%
Friends or relatives - free	18%	13%	16%	14%	13%	16%	15%	21%
Other	3%	0%	4%	2%	3%	4%	3%	1%
N/A – no preference	3%	1%	3%	2%	2%	0%	2%	0%

Source: INSETE Intelligence

	Germany	UK	France	Italy	Austria	Switzerland	Netherlands	USA
Walking around the city	55%	38%	62%	68%	55%	46%	50%	26%
Visiting sights/attractions	51%	38%	53%	62%	53%	38%	48%	27%
Shopping	50%	31%	48%	50%	52%	39%	52%	23%
Go out in the evening to restaurant	50%	34%	62%	61%	50%	38%	53%	26%
Go out in the evening to pub/bar	37%	32%	35%	49%	38%	28%	41%	24%
Take an excursion out of the city	35%	27%	36%	39%	37%	30%	28%	25%
Visiting museums	31%	32%	39%	53%	38%	28%	31%	25%
Go on an organised tour	30%	25%	27%	26%	32%	23%	19%	25%
Visiting exhibitions	26%	27%	13%	40%	27%	23%	18%	23%
Visiting a night-club/disco	25%	22%	20%	20%	29%	21%	26%	25%
Going to concerts	18%	22%	21%	18%	22%	23%	17%	27%
Taking part in a sporting activity	17%	19%	17%	15%	20%	21%	12%	24%
Going to the theatre	14%	23%	12%	13%	17%	20%	15%	24%

Source: INSETE Intelligence



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