

INSETE: The contribution of road tourism to inbound tourism

In 2019, the contribution of road tourism to inbound tourism came to 9.6 million arrivals, 38.2 million overnight stays and €1.8 billion in revenue, which is equivalent to 30.6% of total arrivals, 16.4 % of total overnight stays and 10.1% of total revenue.

This was one of the main conclusions of the latest study conducted by the Institute of the Greek Tourism Confederation (INSETE) under the title ‘[Road tourism in Greece, 2012-2019](#)’. As reflected in the study, Greece’s main markets for road tourism are Romania, Serbia, Bulgaria, Albania, Turkey and the Republic of North Macedonia.

According to the study, road tourism represents a significant portion of Greece’s inbound tourism, especially for northern Greece (Thrace, Macedonia, Epirus). However, road tourism is also characterized by a relatively low Average Per Capita Expenditure (€185 compared to €731 for the rest of tourism and €564 for total inbound tourism), as a result of the low Average Length of Stay (4.0 nights spent compared to 8.9 and 7.4 respectively) but also due to the low Average Expenditure per Night (€47 compared to €82 and €76 respectively).

Moreover, seasonality is strong, with a high concentration in the third quarter of the year. More specifically, 67% of total road tourism revenues flow into the country in the third quarter, compared to 58% for the rest of tourism and 59% for total inbound tourism. Therefore, opening the borders helps turn to account the strong demand for road tourism in the specific quarter. The ease of access and the sense of safety and independence conveyed by private vehicle travel could possibly boost the aforementioned expected demand in the third quarter.

The progress of arrivals, overnight stays and revenues per market

As regards road tourism revenues, what stands out is the consistently upward course of Romania (the largest market in 2019, with €354 million) and Bulgaria (the third largest market, with €282 million). Serbia (the second largest market, with €297 million) shows some variations. Albania has been on an upward trend since 2014, with a slight drop in 2019 (€200 million). Turkey has been on a downward trend since 2015, with a slight recovery in 2017, a drop in 2018 – possibly due to the devaluation of the Turkish lira – and another slight recovery in 2019 (€171 million). Lastly, after showing an upward trend until 2014, the Republic of North Macedonia has been moving on a downward path, with the country’s revenues in 2019 coming to €114 million. The other countries of origin for road tourism show constant variations and revenues from these countries in 2019 came to €360 million.

As regards road tourism overnight stays, the upward trend of Bulgaria and Romania (8.2 million and 7.0 million respectively in 2019) is noteworthy. Serbia shows some variations, with 7.7 million overnight stays for 2019. Next comes Albania, which has been on an upward trend since 2016 and had 3.2 million overnight stays in 2019. After showing an upward trend until 2014, the Republic of North Macedonia has been moving on a downward path, with 2.3 million overnight stays in 2019. Turkey has also been on a downward trend since 2015 but then showed some signs of stabilization and a slight recovery in 2019 (2.1 million). Overnight stays for the other countries of origin for road tourism show some variations, coming to 7.8 million for 2019.

As regards road tourism arrivals, what stands out is the steadily upward course of Bulgaria, along with the downward trend of the Republic of North Macedonia, after a rising trend which lasted until 2015. In 2019, arrivals from these two countries came to 3.8 million and 945 thousand, respectively. From 2013 onwards – the year the country left the IMF support programme – and especially since 2016, Romania has been showing an improvement, with 1.1 million arrivals in 2019. A decrease can also be seen in the number of arrivals from Turkey for 2016 – the year of the unsuccessful coup d'état in the country –, with a subsequent slight improvement and 679 thousand arrivals for 2019. Serbia showed a slight decline in 2015 – the year the country joined the IMF programme – and in 2016, but then recovered and had 935 thousand arrivals in 2019. Albania and the other countries have been on a steadily upward trend – except in 2014 and 2015, respectively –, with 920 thousand and 1.2 million arrivals respectively, in 2019.

Average Per Capita Expenditure, Average Expenditure per Night and Average Length of Stay

As regards the Average Per Capita Expenditure of road tourism for 2019, the highest values were recorded by Serbia (€318) and Romania (€311). Conversely, the lowest values were recorded by Bulgaria (€75) and the Republic of North Macedonia (€121). Turkey and Albania had a PCE of €251 and €218, respectively. The PCE of the other countries of origin for road tourism was €294 in 2019 – following the downward trend of several years –, compared to €610 in 2013.

As regards the Average Expenditure per Night of road tourism, what stands out is Turkey's high level (€82), despite a decline in 2019. Turkey had the highest Average Expenditure per Night for all the years under consideration, reaching a peak in 2013 (€109). On the other hand, this high Average Expenditure per Night is matched by a low Average Length of Stay, resulting in Turkey's PCE ranging at relatively low levels. Albania is next with €63 in 2019, ranking second throughout the period under review despite its fluctuations. Romania (€51 in 2019) and Bulgaria (€35) have variations, with Bulgaria showing the lowest Average Expenditure per Night from 2013 onwards. Average Expenditure per Night is also at low levels – with small

fluctuations – for Serbia (€39 in 2019), the Republic of North Macedonia (€49) and the other countries of origin for road tourism (€46).

As regards the Average Length of Stay of road tourism, it is worth noting the high figure of 15.2 days recorded by the other countries in 2012 and the subsequent downward course to 6.4 days in 2019. Among the main markets of road tourism, Serbia consistently has the highest Average Length of Stay (approximately 7.9-8.9 days), which is, however, combined with a low Average Expenditure per Night. Romania comes next with 5.7-7.3 days, followed by Albania with 3.4-4.2 days. Bulgaria (2-3.8 days), the Republic of North Macedonia (2.6-3.1 days) and Turkey (2.7-3.9 days) have the shortest Average Length of Stay.

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