

Who goes where? How long do they stay?

How much do they spend?

Extracts of Part B: Analysis of the main markets by Region 2024

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The Bank of Greece announced the data of the travel balance by Region and by country of origin of visitors (Bank of Greece, 2024). The collection and processing of travel data by Region, as gathered through the Border Survey (National Statistical Data –Sources and Methods of Measurement, 2016), began in January 2016, and since then the Bank of Greece has been compiling figures on the regional distribution of travel receipts, visits, overnights and inbound travellers (Economic Bulletin, 2006). The classification of the Regions follows the official EU statistical nomenclature (NUTS 2013/EU-28), specifically at its second level (NUTS 2), which corresponds to the country's division into 13 administrative Regions.

The present study analyses the data at the regional level, focusing on Greece's key metrics. The figures are analysed for:

- Visits –noting that one tourist arrival in Greece may involve multiple visits to different Regions.
- Overnights
- Receipts

as well as for the principal indicators:

- Spend per Visit
- Spend per Night
- Average Length of Stay

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1. Key Points

In 2024, a total of 39 355 thousand visits were made to Greece's 13 Regions, up +8,9% on 2023 (36.136 thousand). Overnight stays reached 231 038 thousand, +1,4% higher than in 2023 (227.938 thousand). Tourism receipts grew to € 20 592 million, +4,3% versus 2023 (€ 19.746 million).

Average spend per visit across the 13 Regions in 2024 stood at € 523 versus € 546 in 2023, a decline of –4,2%. This reduction, despite a +2,9% rise in average spend per night (from € 87 to € 89), is attributed to a –6,9% fall in average length of stay (from 6,3 to 5,9 nights).

The picture is far from uniform: there are marked differences both between Regions[1] and among the six main source markets analysed here (Germany, United Kingdom, USA, France, Italy, Netherlands), which together account for 46,8% of visits and 56,6% of both overnight stays and tourism receipts from inbound tourism:

- The largest percentage increase in visits was in the North Aegean Region (+40,1%), while Western Macedonia was the only Region to register a decline (–2,2%).
- Five Regions (Attica, South Aegean, Central Macedonia, Crete, Ionian Islands) together accounted for 83,3% of visits, 87,2% of overnights and 89,7% of receipts.
- The South Aegean is the top choice for all six markets, exhibiting high spend per night and per visit. Visitors from the USA recorded the highest spend per night (€ 107) and per visit (€ 676), whereas Germans posted the lowest spend per night (€ 79) and Italians the lowest spend per visit (€ 545).
- French and Italian visitors had the shortest average stay (6,1 nights), while German visitors stayed longest (8,3 nights).
- Germany remained Greece's largest source market in 2024, generating € 3,702 million in receipts, 46,881 thousand overnights and 5,675 thousand visits, despite declines across all three key performance indicators (spend and length of stay).

[1] For a detailed presentation of the data by Region, see Part A of the study

- The United Kingdom retains 2nd place in visits and receipts, but in 2024 recorded a –3% drop in visits, –6% in overnight stays and –4% in revenues. Nevertheless, it remains the primary market for the Ionian Islands and Thessaly Regions, underscoring its importance to these areas despite overall declines.
- France saw an +8% increase in visits but –12% in receipts and posted the shortest average stay (6,1 nights) among the analyzed markets, with Crete remaining a key destination.
- The USA led all markets in spend per visit (€ 676) and spend per night (€ 107), peaking at € 193 per night in Central Greece.
- Italy achieved growth in visits (+6%) and receipts (+14%), despite a –6% decline in overnights, with a strong presence in Thessaly and the Ionian Islands.
- The Netherlands registered the second-highest spend per visit (€ 623), although visits (–5%) and overnight stays (–9%) fell sharply.
- Significant increases occurred in less-visited Regions such as the North Aegean and Epirus, particularly from the USA, the United Kingdom and Germany.

2. Comparative Analysis of the Main Markets

3.1 Main Markets

Table 1 presents the key figures and performance indicators for Greece's six most important source markets (by travel receipts) in 2023 –Germany, United Kingdom, France, the USA, Italy and the Netherlands –broken down by Region. The metrics shown are:

- Average Spend per Visit
- Average Spend per Night
- Length of Stay

Table 1: : Main markets in Greece by Region–2024

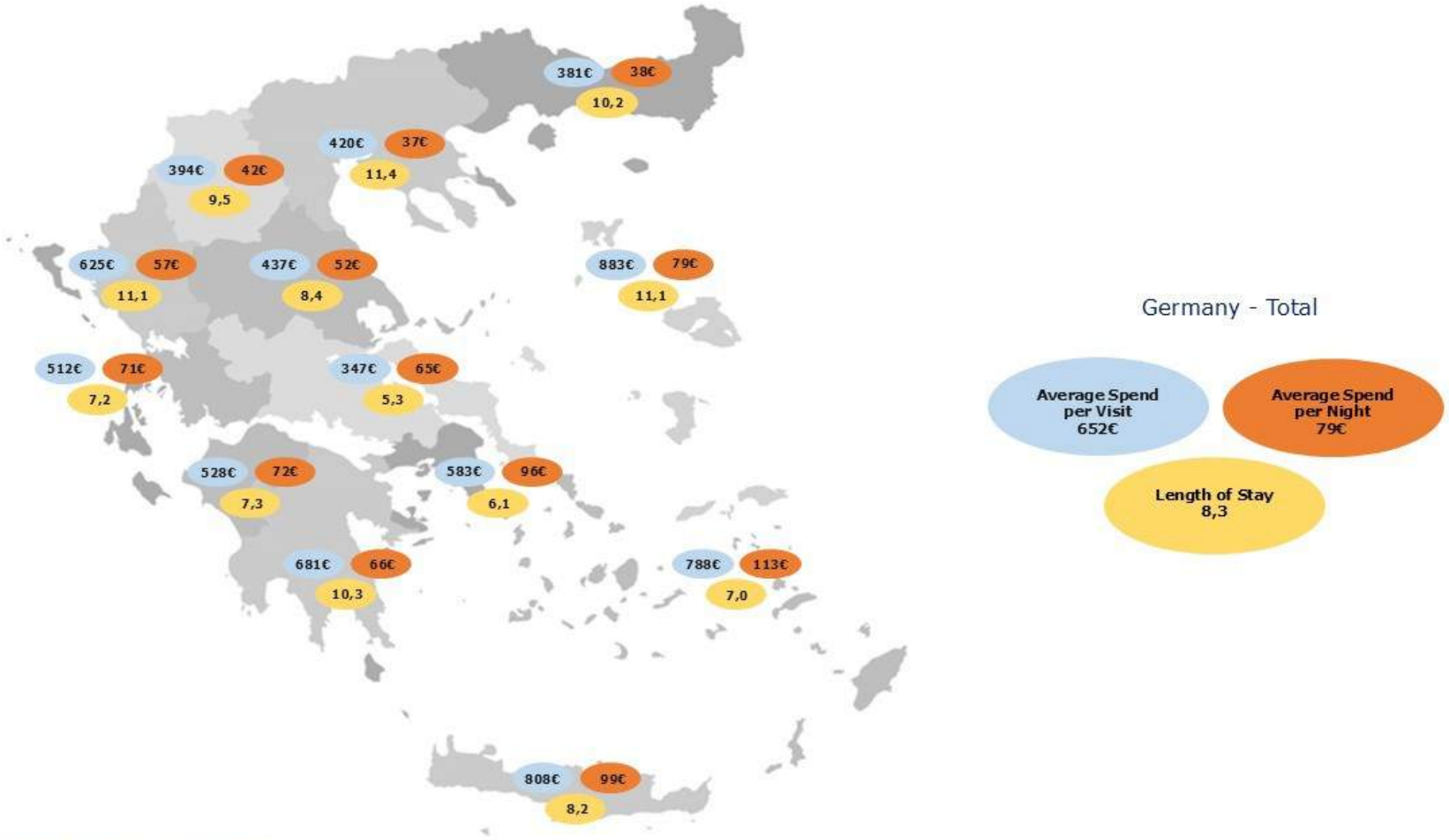
Countries	Visits (thousands)		Overnights (thousands)		Receipts (millions)		KPIs		
	2024	Contribution	2024	Contribution	2024	Contribution	Average Spend per Visit	Average Spend per Night	Lenth of Stay
Germany	5.675	14,4%	46.881	20,3%	3.702	18,0%	652 €	79 €	8,3
United Kingdom	4.691	11,9%	33.239	14,4%	3.160	15,3%	674 €	95 €	7,1
USA	2.342	6,0%	14.768	6,4%	1.584	7,7%	676 €	107 €	6,3
France	2.288	5,8%	13.924	6,0%	1.260	6,1%	551 €	90 €	6,1
Italy	2.249	5,7%	13.762	6,0%	1.225	6,0%	545 €	89 €	6,1
Netherlands	1.168	3,0%	8.170	3,5%	728	3,5%	623 €	89 €	7,0
Subset	18.412	46,8%	130.743	56,6%	11.658	56,6%	-	-	-
Total	**39.355**	-	**231.038**	-	**20.592**	-	**523 €**	**89 €**	**5,9**

Source: Bank of Greece - Processing: INSETE Intelligence

The six countries together account for 46.8% of visits, 56.6% of overnight stays and 56.6% of tourism receipts. Of the markets analyzed, visitors from the USA record the highest spend per visit (€ 676). Visitors from the USA also have the highest spend per night (€ 107). Germans post the lowest spend per night (€ 79) and Italians the lowest spend per visit (€ 545). Finally, French and Italian visitors have the shortest average stay (6.1 nights), while German visitors stay the longest (8.3 nights).

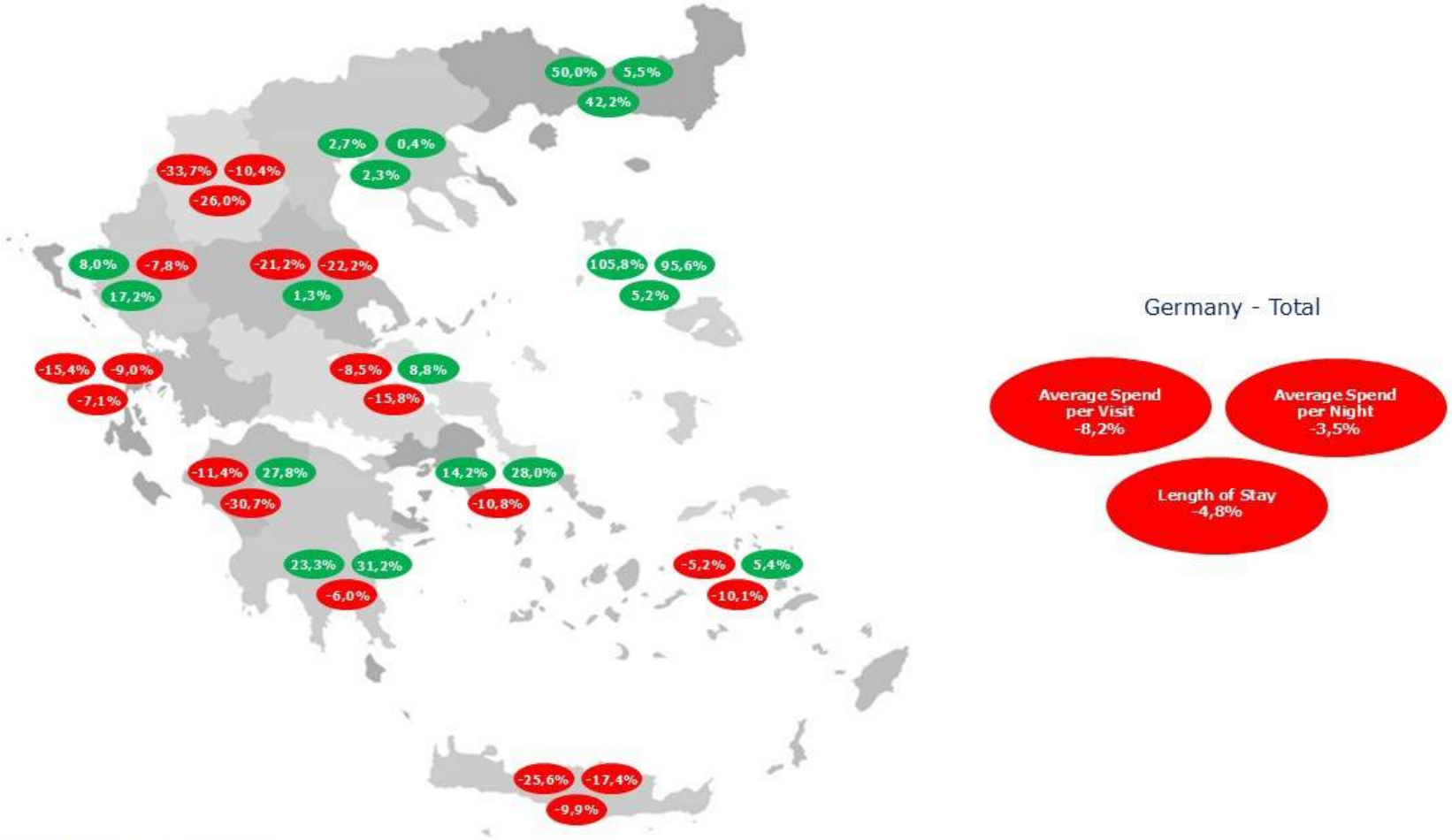
3. Profile of Germany

Map 1: Germany-Average Spend per Visit, Average Spend per Night, Length of Stay 2024



Source: Bank of Greece - Processing: INSETE Intelligence

Map 2: Germany-Change Average Spend per Visit, Average Spend per Night, Length of Stay 2024-2023



Source: Bank of Greece - Processing: INSETE Intelligence

Germany retained first place in visits, overnight stays and travel receipts, remaining Greece's top inbound tourism market in 2024. Travel receipts from Germany amounted to € 3.702 million (+4% versus 2023), overnight stays to 46.881 thousand (+7%) and visits to 5 675 thousand (+13%).

Based on receipts, the German market ranks 1st in the South Aegean, Crete, Central Macedonia, Peloponnese and Epirus; 2nd in Central Greece, Eastern Macedonia–Thrace, Western Macedonia, Ionian Islands, Thessaly and Western Greece; and 3rd in Attica and North Aegean.

Based on visits, it is the primary market in South Aegean, Crete and Peloponnese; 2nd in Ionian Islands, Epirus, Thessaly, Western Greece and Western Macedonia; and 3rd in Eastern Macedonia–Thrace, Central Macedonia and North Aegean.

Based on overnight stays, Germany leads in South Aegean, Central Macedonia, Peloponnese, Epirus, Western Greece, Central Greece, Western Macedonia and Crete; is 2nd in Eastern Macedonia–Thrace, Ionian Islands and Thessaly; and 3rd in Attica and North Aegean.

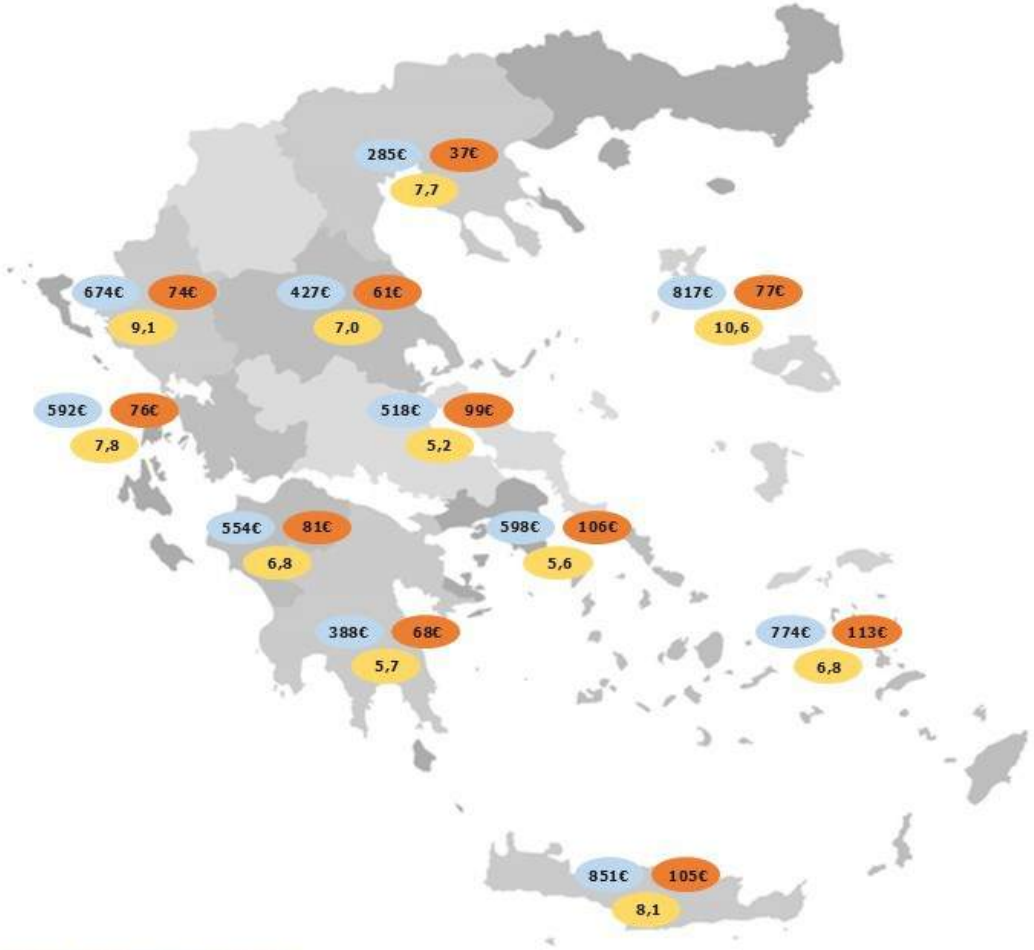
Compared with the national averages, the German market posts a higher spend per visit (€ 652 vs. € 523), a lower spend per night (€ 79 vs. € 89) and a longer average stay (8,3 vs. 5,9 nights). In 2024 it recorded a –8,2% change in spend per visit, –3,5% in spend per night and –4,8% in average length of stay versus 2023.

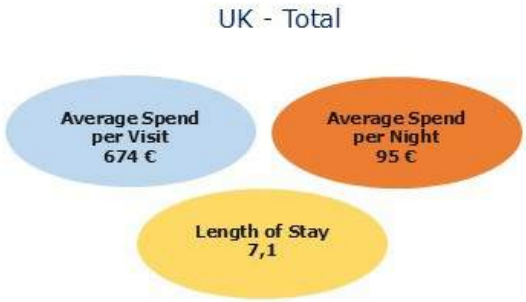
The three most-visited Regions by German travellers were: Crete; South Aegean; Central Macedonia.

- ⊗ The maximum spend per visit by German visitors was € 883 in the North Aegean
- ⊗ The maximum spend per night by German visitors was € 113 in the South Aegean
- ⊗ The longest average stay by German visitors was 11,4 nights in Central Macedonia

4. Profile of UK

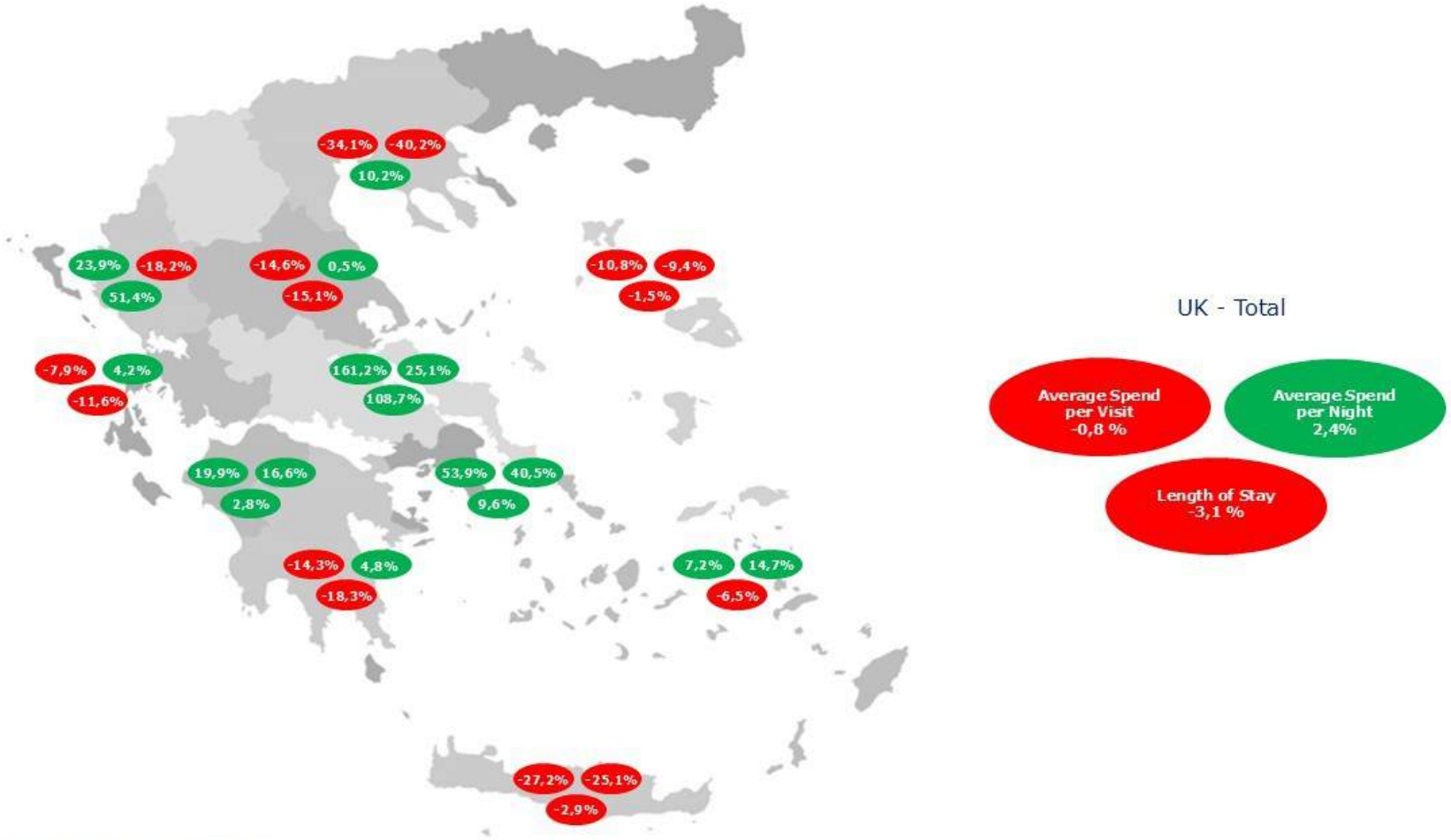
Map 3: UK-Average Spend per Visit, Average Spend per Night, Length of Stay 2024





Source: Bank of Greece - Processing: INSETE Intelligence

Map 4: UK-Change Average Spend per Visit, Average Spend per Night, Length of Stay 2024-2023



Source: Bank of Greece - Processing: INSETE Intelligence

The United Kingdom ranked second in visits, overnight stays and travel receipts for inbound tourism in Greece in 2024. Travel receipts from the UK amounted to € 3.160 million (–4% compared with 2023), overnight stays totaled 33.239 thousand (–6%) and visits reached 4.691 thousand (–3%).

By receipts, the UK market holds first place in the Ionian Islands and Thessaly, second place in South Aegean, Crete, Attica and North Aegean, and third place in Epirus and Western Greece. By visits, it ranks first in the Ionian Islands and Thessaly and second in Attica, South Aegean, Crete and North Aegean. By overnight stays, it is first in the Ionian Islands and Thessaly, second in South Aegean, Crete, Attica, Epirus and North Aegean, and third in Western Greece.

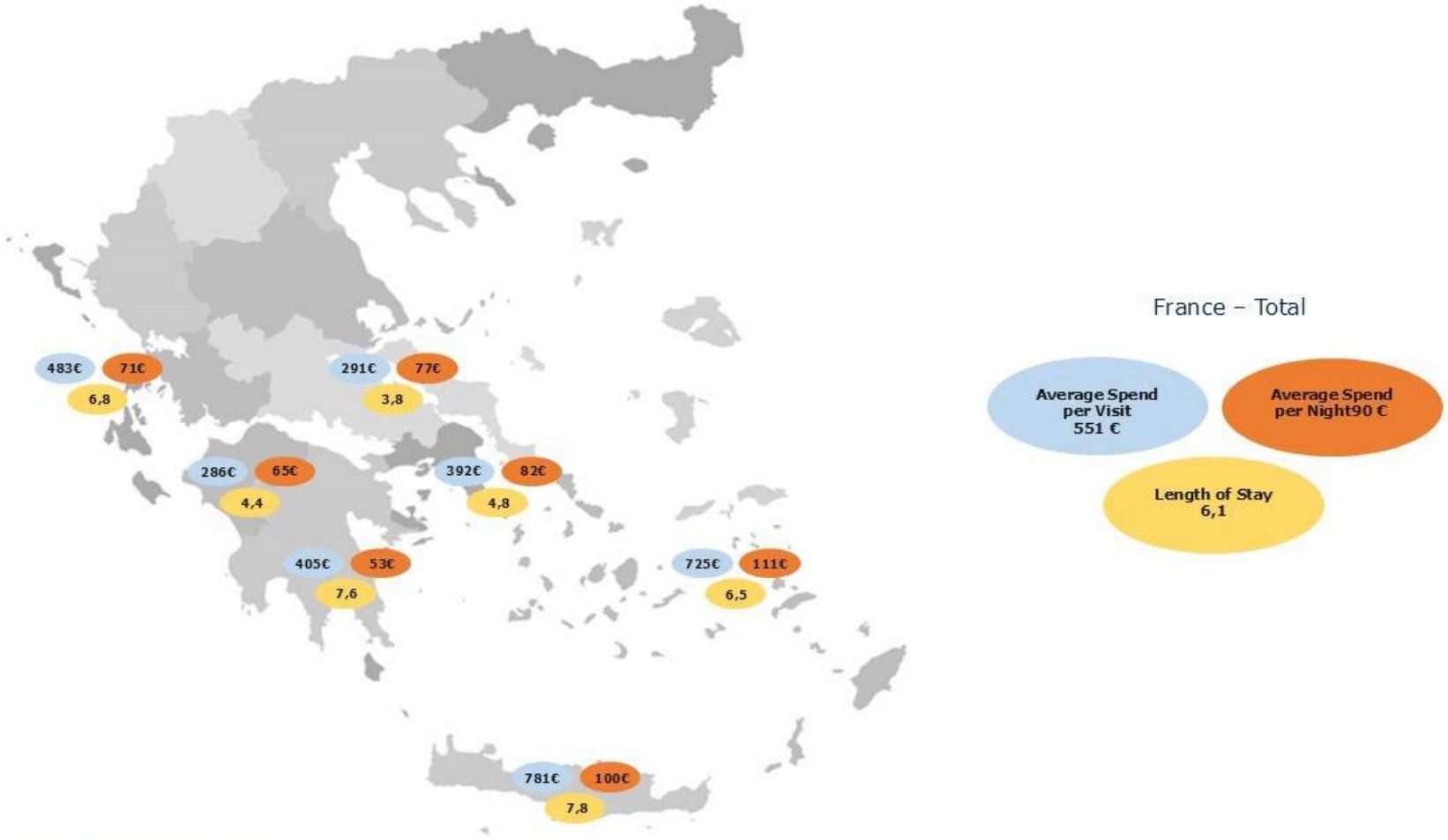
Compared with the national averages for Greece, the UK posts a higher spend per visit (€ 674 versus € 523), a lower spend per night (€ 95 versus € 89) and a longer average length of stay (7,1 nights versus 5,9 nights). In 2024 the UK market recorded a –0,8% change in spend per visit, a +2,4% change in spend per night and a –3,1% change in average length of stay relative to 2023.

The three most-visited Regions by UK travellers were South Aegean, Ionian Islands and Attica.

- The maximum spend per visit by British visitors was € 851 in Crete
- The maximum spend per night was € 113 in South Aegean
- The longest average stay was 10,6 nights in North Aegean.

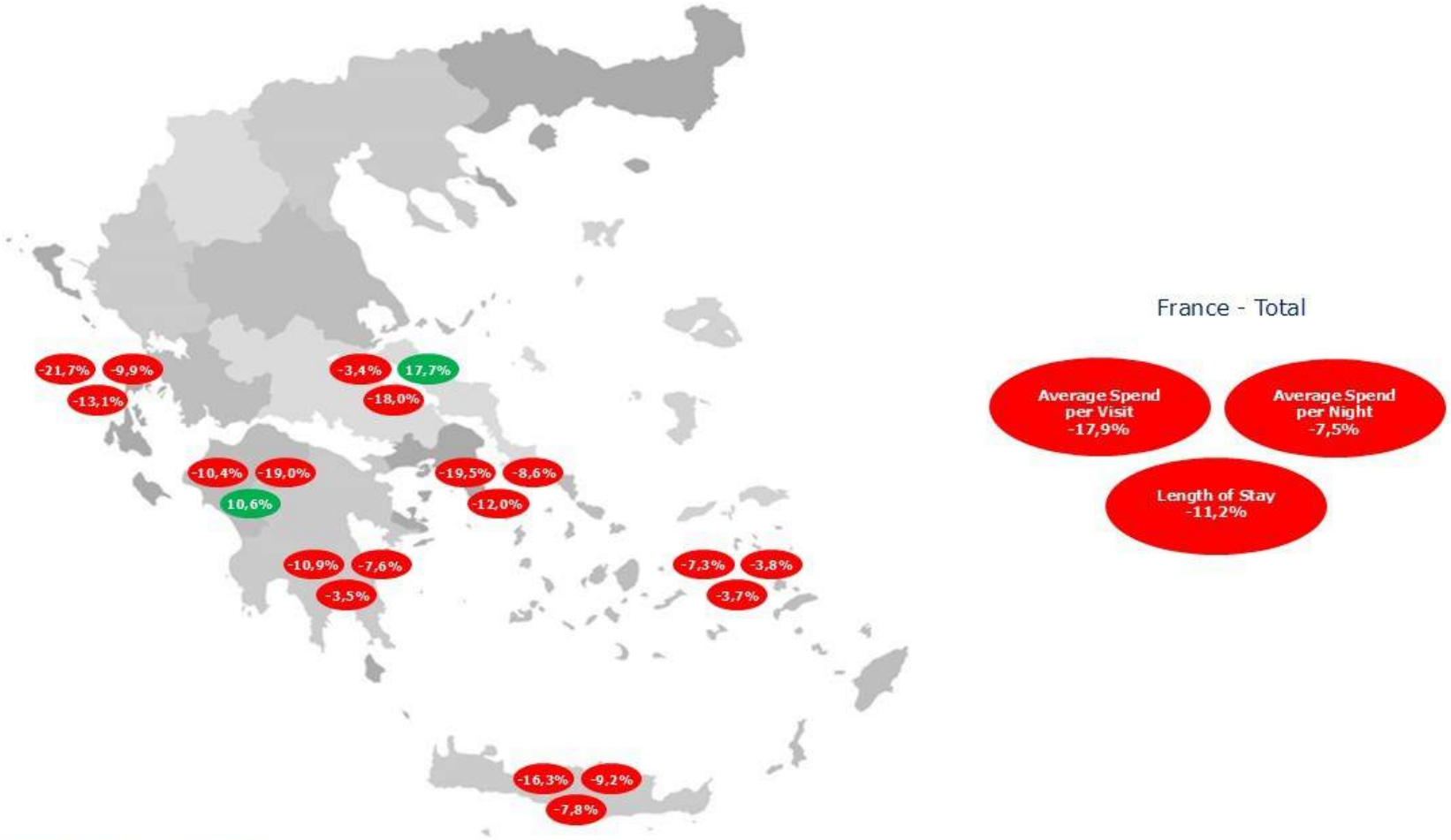
5. Profile of France

Map 5: France-Average Spend per Visit, Average spend per Night, Length of Stay 2024



Source: Bank of Greece - Processing: INSETE Intelligence

Map 6: France-Change Average Spend per Visit, Average spend per Night, Length of Stay 2024-2023



Source: Bank of Greece - Processing: INSETE Intelligence

France ranked fourth in travel receipts and overnight stays, and fifth in visits for inbound tourism to Greece in 2024. Travel receipts from France amounted to € 1.260 million (–12% versus 2023), overnight stays reached 13.924 thousand (–4%) and visits totaled 2.288 thousand (+8%).

By receipts, the French market holds third place in the Regions of Crete, Peloponnese and Central Greece.

By visits, it ranks second in Central Greece and third in the Regions of Peloponnese, Crete, Western Greece and Attica.

By overnight stays, France is second in the Peloponnese and third in Crete and Central Greece.

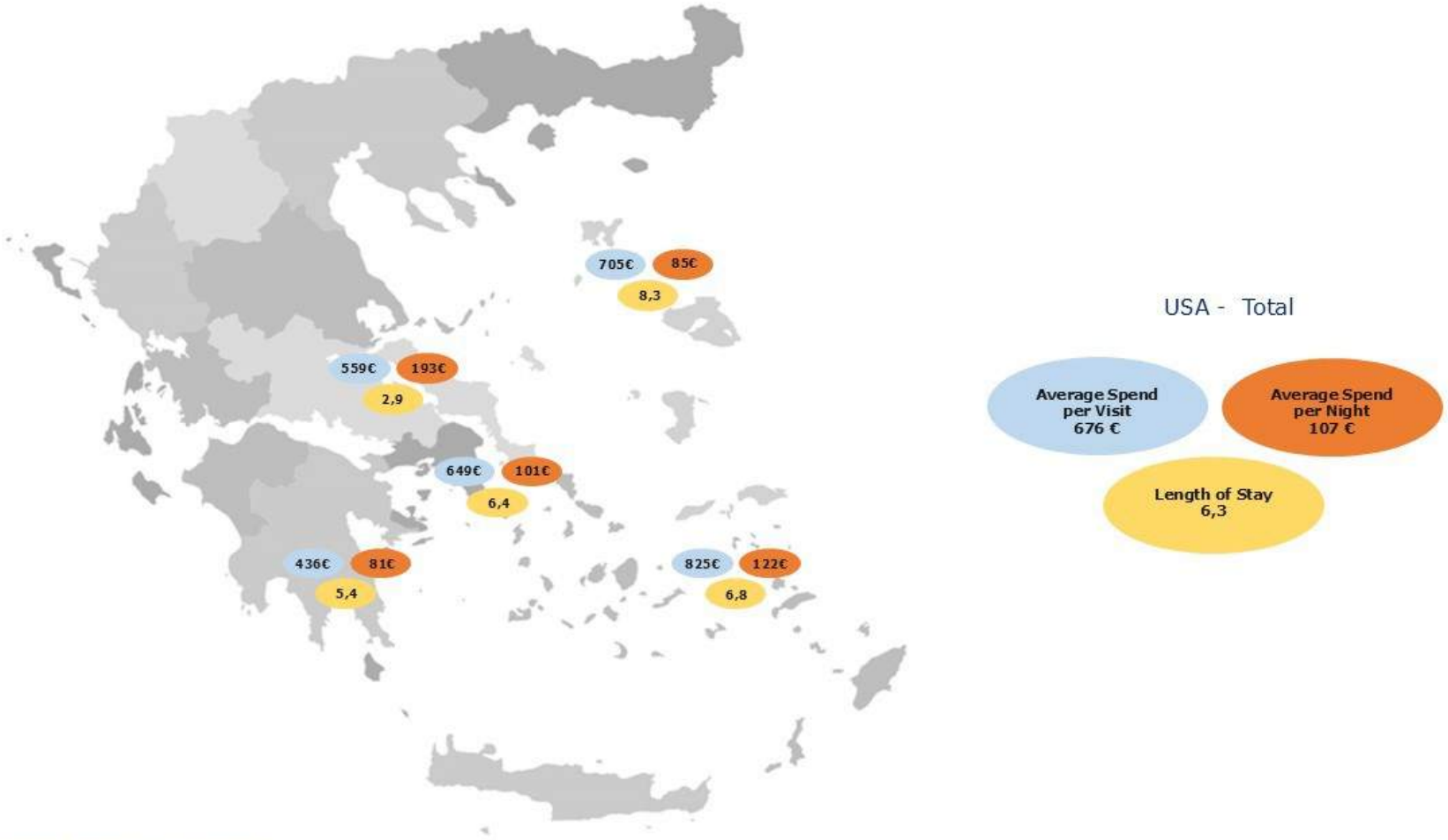
Compared with the national averages, the French market posts a higher spend per visit (€ 551 versus € 523), a higher spend per night (€ 90 versus € 89) and a slightly longer average stay (6,1 versus 5,9 nights). In 2024 it recorded a –17,9% change in spend per visit, –7,5% in spend per night and –11,2% in average length of stay versus 2023.

The three most-visited Regions by French travellers were Attica, South Aegean and Peloponnese.

- The maximum spend per visit by French visitors was € 781 in Crete
- The maximum spend per night by French visitors was € 111 in South Aegean.
- The longest average stay by French visitors was 7,8 nights in Crete.

6. Profile of USA

Map 7: USA- Average Spend per Visit, Average Spend per Night, Length of Stay 2024



Source: Bank of Greece - Processing: INSETE Intelligence

Map 8: USA-Change Average Spend per Visit, Average Spend per Night, Length of Stay 2024-2023





Source: Bank of Greece - Processing: INSETE Intelligence

The United States ranked third in travel receipts and overnight stays, and fourth in visits for Greece's inbound tourism in 2024. Travel receipts from the USA amounted to € 1.584 million (+13,6% versus 2023), visits reached 2.342 thousand (+5,7%) and overnight stays totaled 14.768 thousand (–5,7%).

By receipts, the US market holds first place in the Regions of North Aegean, Central Greece and Attica, second place in Peloponnese, and third place in South Aegean.

By visits, it ranks first in Central Greece, North Aegean and Attica, second in Peloponnese, and third in South Aegean.

By overnight stays, the USA is the top market in North Aegean and Attica, second in Central Greece, and third in South Aegean and Peloponnese.

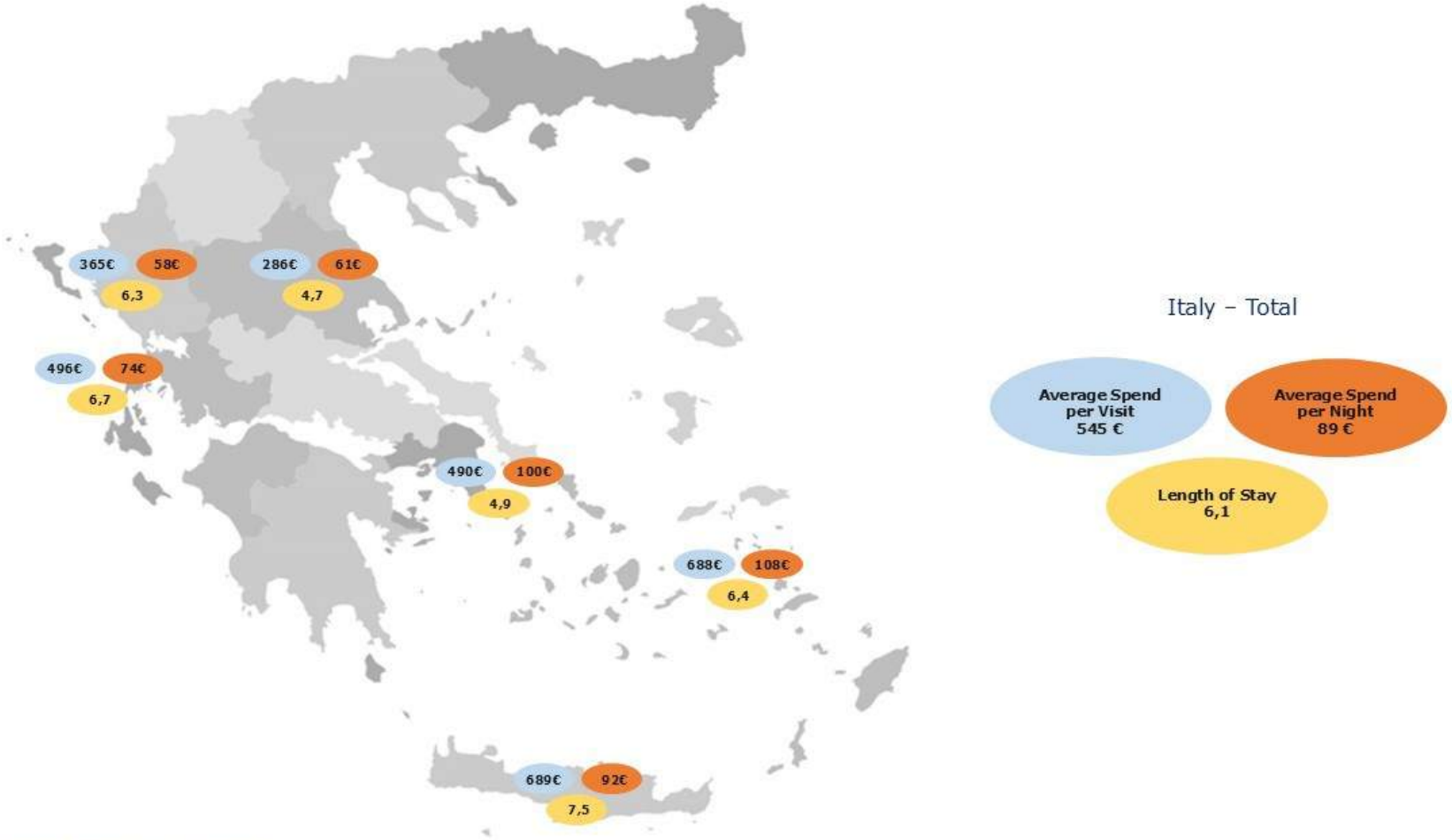
Compared with the national averages, US visitors post a higher spend per visit (€ 676 vs. € 523), a higher spend per night (€ 107 vs. € 89) and a longer average stay (6,3 nights vs. 5,9). In 2024 they recorded a +3,8% change in spend per visit, a +16,9% change in spend per night and a –11,2% change in average length of stay versus 2023.

The three most-visited Regions by US travellers were Attica, South Aegean and Peloponnese.

- Maximum spend per visit by US visitors: € 825 in South Aegean
- Maximum spend per night by US visitors: € 193 in Central Greece
- Longest average stay by US visitors: 8,3 nights in North Aegean

7. Profile of Italy

Map 9: Italy-Average Spend per Visit, Average spend per Night, Length of Stay 2024



Source: Bank of Greece - Processing: INSETE Intelligence

Map 10: Italy-Change Average Spend per Visit, Average spend per Night, Length of Stay 2024-2023



Source: Bank of Greece - Processing: INSETE Intelligence

Italy ranked sixth in visits and fifth in both overnight stays and travel receipts for inbound tourism to Greece in 2024. Travel receipts from Italy amounted to € 1.225 million (+14% versus 2023), overnight stays totaled 13.762 thousand (–6%) and visits reached 2.249 thousand (+6%).

By travel receipts, the Italian market holds third place in Thessaly and the Ionian Islands. By visits, it ranks third in Thessaly, Epirus and the Ionian Islands. By overnight stays, it is the third-largest market in the Ionian Islands and Thessaly.

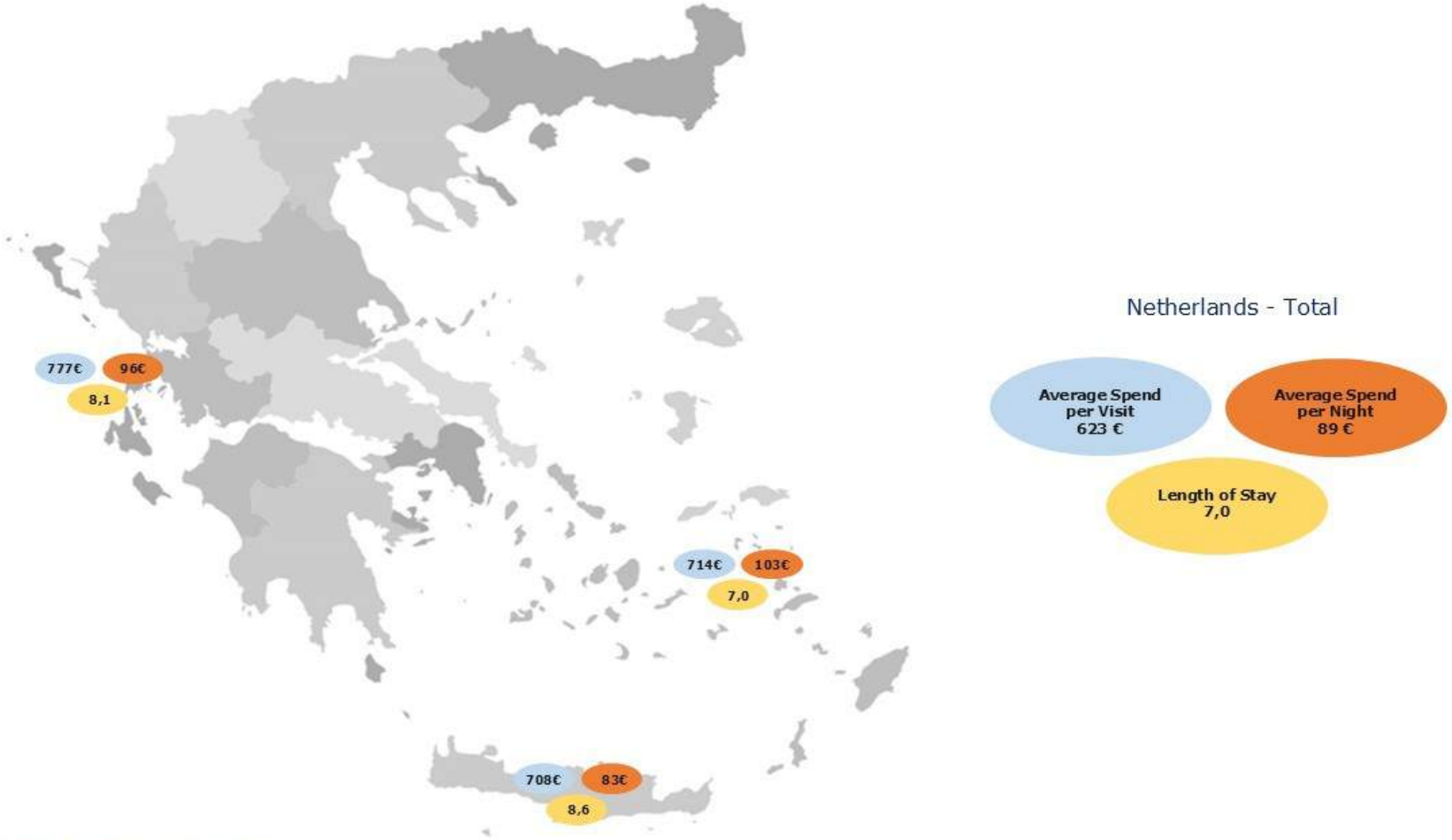
Compared with the national averages, Italian visitors post a higher spend per visit (€ 545 versus € 523), the same spend per night (€ 89) and a slightly longer average stay (6,1 nights versus 5,9). In 2024 Italy recorded a +7,5% change in spend per visit, a +20,5% change in spend per night and a –10,8% change in average length of stay versus 2023.

The three most-visited Regions by Italian travellers were South Aegean, Ionian Islands and Attica.

- The maximum spend per visit by Italian visitors was € 689 in Crete
- The maximum spend per night was € 108 in South Aegean
- The longest average stay was 7,5 nights in Crete.

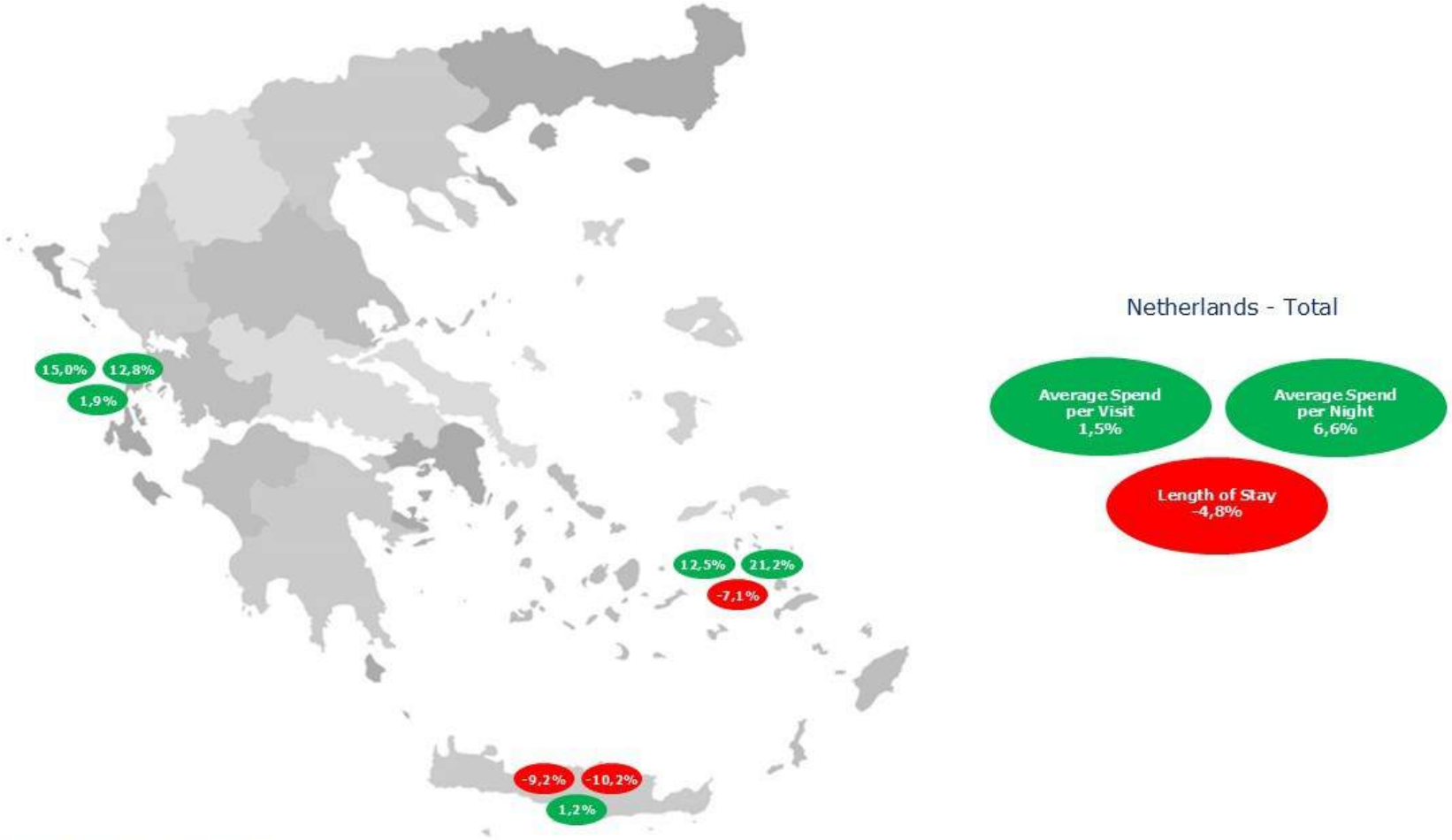
8. Profile of Netherlands

Map 11: Netherlands-Average Spend per Visit, Average Spend per Night, Length of Stay 2024



Source: Bank of Greece - Processing: INSETE Intelligence

Map 12: Netherlands Change Average Spend per Visit, Average spend per Night, Length of Stay 2024-2023



Source: Bank of Greece - Processing: INSETE Intelligence

The Netherlands ranked sixth in overnight stays and travel receipts, and twelfth in visits for inbound tourism to Greece in 2024. Travel receipts from the Netherlands amounted to € 728 million (–3% versus 2023), overnight stays totaled 8.170 thousand (–9%) and visits reached 1.168 thousand (–5%).

Based on receipts, visits and overnight stays, the Dutch market does not place in the top three in any Region. Compared with the national averages, Dutch visitors post a higher spend per visit (€ 623 versus € 523), the same spend per night (€ 89) and a longer average stay (7,0 nights versus 5,9).

In 2024 they recorded a +1,5% change in spend per visit, +6,6% in spend per night and –4,8% in average length of stay versus 2023. The three most-visited Regions by Dutch travellers were South Aegean, Crete and the Ionian Islands.

- The maximum spend per visit by Dutch visitors was € 777 in the Ionian Islands
- The maximum spend per night by Dutch visitors was € 103 in South Aegean
- The longest average stay by Dutch visitors was 8,6 nights in Crete

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ΕΣΠΑ 2021-2027

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