Brand Greece: How Attractive Is Greece as a Tourist Destination?

A Comparison with Competing Mediterranean Destinations

Part A: European Markets (Germany, France, United Kingdom, Spain, Italy)

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Dr. Aris Ikkos, ISCH
Research Director

Giannina Rassouli
Analyst

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1. Key points

• **Greece's continued presence among the top choices of Western European travellers for international travel over the next twelve months confirms that Greek tourism has entered a phase of maturity**. This finding reinforces the view that a strategic objective for the tourism ecosystem should be to convert interest in and intention to visit Greece into a final destination choice, not simply by increasing arrivals and revenues during the third quarter and in established destinations, but also by extending the tourism season and developing new destinations. Achieving this objective requires the improvement and development of the country's tourism product and infrastructure in a sustainable manner, while preserving the distinctive character and competitive advantages of each destination.

• **Greece consistently remains among the top preferred destinations in the major Western European markets**, maintaining a strong position in Germany, France, the United Kingdom and Italy, while recording further improvement in the Spanish market.

More specifically, Greece ranks:

• **3rd** in preference for international travel in the **German** and **Italian** markets.

• **4th** in **France** and the **United Kingdom**.

• **6th** in **Spain**, while nevertheless improving its position compared with the previous year.

• A particularly positive development is that, compared with 2024, Greece improved its position in the United Kingdom and Spain, while maintaining a consistently high ranking in the other markets.

• It should be noted that the markets examined account for slightly less than half of total inbound tourism revenue, at 47%–48%, based on official Bank of Greece data for 2023–2024.

Greece and the Competition

• Greece's presence among the top five preferred destinations in all the markets examined – with the exception of Spain, where it is nevertheless on an upward trajectory – confirms that Brand Greece has established itself at the highest level of competition in the Mediterranean. Notably, in the United Kingdom and Spanish markets, the difference in preference between Greece and the country ranking one position ahead is only around 2 percentage points. More specifically, Greece's ranking in the preferences of each market is as follows:

- **Germany:** Greece ranks 3rd, after Italy and Spain, with a preference rate of 19.7%.

- **France**: Greece ranks 4th, after Spain, Italy and Portugal, with a preference rate of 12.6%.

- **United Kingdom:** Greece ranks 4th, after Spain, Italy and France, with a preference rate of 19.9%.

- **Italy:** Greece ranks 3rd, with a preference rate of 16.8%, behind Spain and France.

- **Spain**: Greece ranks 6th, with a preference rate of 9.5%, while nevertheless having improved its relative position.

It should be noted that in the **Italian and Spanish markets, other Mediterranean destinations such as Croatia and Türkiye do not rank among the top ten preferred destinations**, further strengthening Greece's relative position.

• Despite the fact that **geographical proximity to Central Europe and the possibility of travelling by road favour competing destinations such as Italy, Spain and France, Greece consistently maintains a high position among the preferences of Western European travellers. This highlights that the attractiveness of Greek destinations** is not significantly affected by factors such as ease of access, but is instead based on a strong and recognisable tourism product which, as noted above, with the implementation of an appropriate strategy, can support the extension of the tourism season and spread the benefits of tourism to other regions of the country.

2. Methodology

The study presents and analyses the results of an online survey conducted by GlobalWebIndex (GWI) among individuals aged 16–64 in two waves (the first in January and February and the second in July and August) in both 2025 and 2024. GWI's surveys cover a wide range of topics and consumer habits; however, only data from GWI's Travel survey relating to the travel behaviour of people interested in travelling abroad are presented here. The responses refer to all consumers in each country who participated in GWI's Travel survey, and not only to those who express an interest in or intend to travel to Greece. GWI's Travel survey is conducted in the following countries: France, Germany, the United Kingdom, Spain, Italy, the United States, Canada, China, Japan, India, Singapore and Australia.

This first part presents data for the European markets, namely France, Germany, the United Kingdom, Spain and Italy, while a second part focusing on selected long-haul markets will be published at a later date.

In the present study, the results presented are based on the following sample sizes from GWI's Travel survey by country, comprising respondents who stated that they had begun planning their holidays abroad for the next 12 months. For the two survey waves conducted in 2025: France: 1,118; Germany: 1,398; United Kingdom: 1,436; Spain: 1,404; and Italy: 2,046. For the two survey waves conducted in 2024: France: 1,153; Germany: 1,420; United Kingdom: 1,453; and Spain: 1,462. Italy participated in the survey for the first time in 2025. The sample has been weighted based on internet penetration in each country and its overall population. Responses in each country have been weighted according to age, gender and level of education.

Note: The survey includes multiple-response questions, for which the sum of the response percentages may exceed 100% in each country. Furthermore, due to the multiple-response format, responses for the Canary Islands (which are presented as a separate option) cannot be added to those for Spain, as a respondent may have selected both destinations.

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SETE Institute

Voukourestiou 32,

106 71 | Athens

t: +302103244368

e: info@insete.gr

www.insete.gr