The Profile of Key Markets for Greek Tourism

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



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Dr. Aris Ikkos, ISHC
Research Director

Giannina Rassouli
Analyst

INSETE INTELLIGENCE

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1. Main results

The study captures the travel intentions of potential visitors to Greece from five major European markets (Germany, the United Kingdom, France, Italy and Spain), which in 2025 accounted for more than 46% of Greece's inbound tourism revenue. The study is based on data from the GWI Travel survey, conducted in January and February among a sample of approximately 4,600 individuals aged 16 and over, weighted by age, gender and education level. It examines respondents' intentions to travel abroad over the next 12 months, a period that includes the crucial summer months.

Market Profiles

Germany – Germany was Greece's largest market in terms of tourism revenue in 2025. Greece ranks as the third most preferred destination among Germans in terms of intention to visit.

Germany is the most "mature" market in terms of travel planning. 72% plan to travel abroad, with a strong preference for longer holidays (55% lasting more than 7 days). Beach/coastal holidays dominate (50%), followed by nature-based trips (37%) and city breaks (34%). German travellers book early: 59% book their accommodation at least three months in advance for short holidays, rising to 68% for longer holidays. They travel mainly with a partner (54%) or family (30%) and prefer hotels (65%) or rental accommodation (26%). 42% are willing to pay between €86 and €145 per night for accommodation, while 22% are willing to pay more than €145. Key travel motivations include experiencing a new place (46%) and enjoying better weather (42%). Cars play an important role in transportation (37%), which favours nearby destinations.

United Kingdom – The United Kingdom was Greece's second-largest market in terms of tourism revenue in 2025. Greece ranks as the fourth most preferred destination among British travellers in terms of intention to visit, moving up one position and gaining 0.7 percentage points compared with 2025.

The United Kingdom is the market with the highest intention to travel abroad (74%) and has a strong tradition of overseas holidays (81% usually travel abroad). Air travel is by far the dominant mode of transport (91%), meaning that destination choices are less constrained by geography. The main travel motivations are relaxation (67%) and better weather (52%) – a profile that is highly compatible with Greece. Travellers prefer beach/coastal holidays (48%) and city breaks (42%), while 81% choose hotel accommodation. The market shows a tendency towards last-minute bookings. 35% are willing to pay £76–£125 per night for accommodation, while 34% are willing to pay more than £150 per night.

France – France was Greece's fourth-largest market in terms of tourism revenue in 2025 (the United States ranked third). Greece ranks as the fourth most preferred destination among French travellers in terms of intention to visit, falling by one position and 2.7 percentage points compared with 2025.

France has the lowest share among the five markets in terms of intention to travel abroad (61%). However, it has a small but significant segment of "frequent travellers" (18% intend to take seven or more trips and 12% intend to take nine or more). French travellers mainly choose sightseeing (39%), beach/coastal holidays (35%) and nature-based trips (30%), with strong interest in religious sites (34% – the highest among all five markets). They prefer hotels (60%), while guesthouses/B&Bs are also popular (25%). 22% are willing to pay more than €145 per night for accommodation.

Italy – Italy was Greece's fifth-largest market in terms of tourism revenue in 2025. Greece remains the third most preferred destination among Italian travellers in terms of intention to visit, although it has lost 2.9 percentage points compared with 2025.

The Italian market has a strong propensity for international travel (76% usually travel abroad) and strong demand for city breaks (44%) – the highest percentage among all five markets. Beach/coastal holidays (30%) and sightseeing (30%) follow. Italians show the strongest preference for short-haul travel (85%) and the lowest willingness to pay for mid-haul flights (37% are willing to pay less than €269), reflecting Italy's geographical proximity to many European destinations. 33% are willing to pay between €86 and €125 per night for accommodation, while 13% are willing to pay more than €125 per night.

Spain – Spain was Greece's nineteenth-largest market in terms of tourism revenue in 2025, but has shown significant growth in recent years. Greece remains the sixth most preferred destination among Spanish travellers in terms of intention to visit, facing strong competition from closer destinations as well as from Spain itself, which offers a similar "Sun and Sea" tourism product.

The Spanish market shows a high intention to travel abroad (72%), with preferences for city breaks (31%), sightseeing (36%) and nature-based trips (26%). Preference for beach/coastal holidays is lower (26%) than in the other markets, which is understandable for a country with an extensive coastline and a similarly well-developed tourism product. Spanish travellers mainly travel with a partner (61%) and show the greatest willingness to increase their spending (36% intend to spend more than they usually do), reflecting the strong performance of the Spanish economy. Spanish travellers show the lowest intended spending on flights. Finally, 36% are willing to pay between €86 and €125 per night for accommodation, while 13% are willing to pay more than €125 per night.

Intention to Maintain and Increase Spending

The majority intend to spend about the same as they usually do (45–55%), while those **intending to spend more outnumber those intending to spend less** by 7–21 percentage points, creating favourable conditions for the tourism market.

Key Differences Between Markets

Intention to Travel Abroad – There is a clear difference between France (61%) and the other markets (71–74%).

Number of Trips Abroad – The majority plan to take 1–2 trips (49–58%), with the exception of France (29%). On the other hand, France has the highest share (18%) of travellers intending to take seven or more trips, compared with 1–3% in the other countries. In fact, 12% state that they intend to take nine or more trips.

Booking Lead Time – Germany and the United Kingdom plan their trips further in advance, while Spain and Italy tend to book at the last minute. The trend towards even later bookings in 2026 compared with 2025 is common across all markets, with implications for booking management.

Geographical Constraints and Air Connectivity – Travellers from Germany, France and Italy make significant use of cars or trains, favouring destinations closer to home. The United Kingdom, with 91% of travellers travelling by air, is the market with the greatest flexibility in destination choice – something that can be leveraged strategically.

Spending Profile and Price Sensitivity – Germany and the United Kingdom show greater tolerance for higher accommodation and airfare prices. Spain and Italy are clearly more price-sensitive, with lower upper spending limits – a factor that is critical for hotel pricing and airline route strategies.

Conclusions for Greece as a Destination

The overall picture for Greece **is mixed and calls for a differentiated strategy** for each market.

A particularly positive feature of these markets is the demand for beach/coastal holidays and city breaks – the two dominant types of holiday in most markets – which aligns very well with Greece's tourism product. Growing interest in nature and hiking represents an additional opportunity to diversify the tourism offering and promote regions where tourism activity is still relatively underdeveloped. The preference for trips lasting 5–7 days or longer, combined with stable or increasing willingness to spend, supports the maintenance or improvement of tourism revenue per arrival.

On the other hand, 76–85% of travellers choose short-haul destinations, which places Greece at a competitive disadvantage compared with Spain, Portugal, Italy and Croatia in many markets.

Finally, the widespread trend towards last-minute bookings highlights the need for flexible booking policies, a strong presence on major platforms and targeted promotional activities. For Germany and the United Kingdom, where travellers tend to plan further in advance, these activities should focus on the winter and spring months, while for Spain and Italy they should take place closer to the peak travel season.

2. Methodology

The study presents and analyses the results of an online survey conducted by GlobalWebIndex (GWI) among individuals aged 16 and over during the period January–February 2026. 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, Brazil, Mexico, South Korea and Australia.

This first part presents data for the European markets, namely Germany, France, the United Kingdom, Spain and Italy. 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: Germany: 1,000; France: 1,004; United Kingdom: 1,050; Spain: 1,049; and Italy: 1,500. 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.

It should be noted that the survey also includes multiple-response questions, for which the sum of the response percentages may exceed 100% in each country.

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SETE Institute
Voukourestiou 32,
106 71 | Athens
t: +302103244368
e: info@insete.gr
www.insete.gr