



Greek Tourism: Challenges, Prospects and Trends

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Way Ahead

A person stands on a large, dark rock in the foreground, looking out over a coastal town and harbor. The town is built on a hillside, and the harbor is filled with boats. The sky is a deep blue, suggesting sunset or sunrise. The overall scene is serene and scenic.

Tourism in Greece

Facts & Figures

Why do they visit?

Facts & Figures

2025

- Greece's #1 export sector

- €30,2 billion in economic output representing directly ~13,0% of Greek GDP (2023-the highest historically)

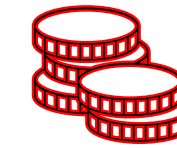
- Approximately ~30% of Greek GDP when indirect impact is also added

- 16,5 % of employees in Greece are occupied in F&B and hospitality in the summer months

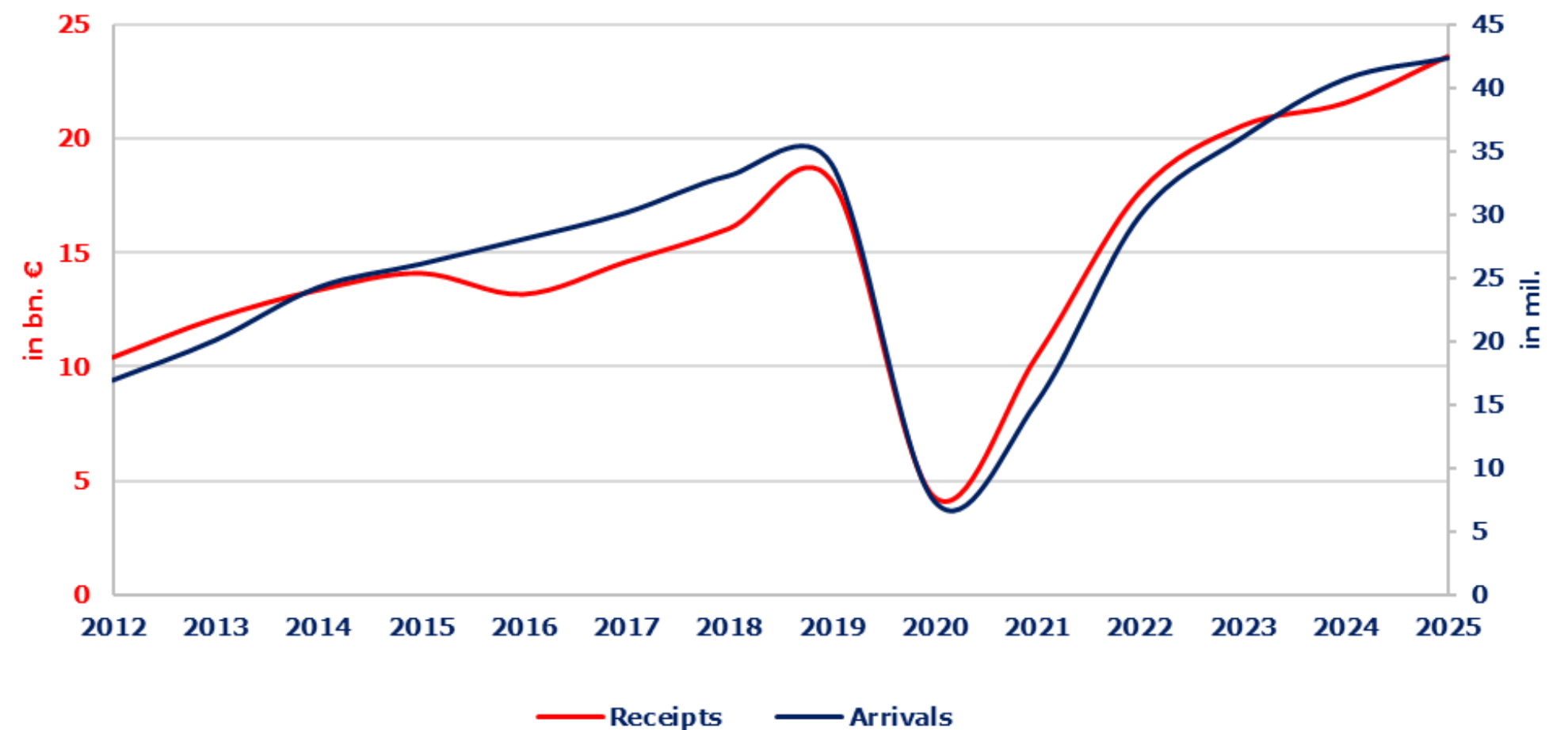
- Greece's #1 most dynamic, resilient and socially inclusive employer



<40 mi. Arrivals

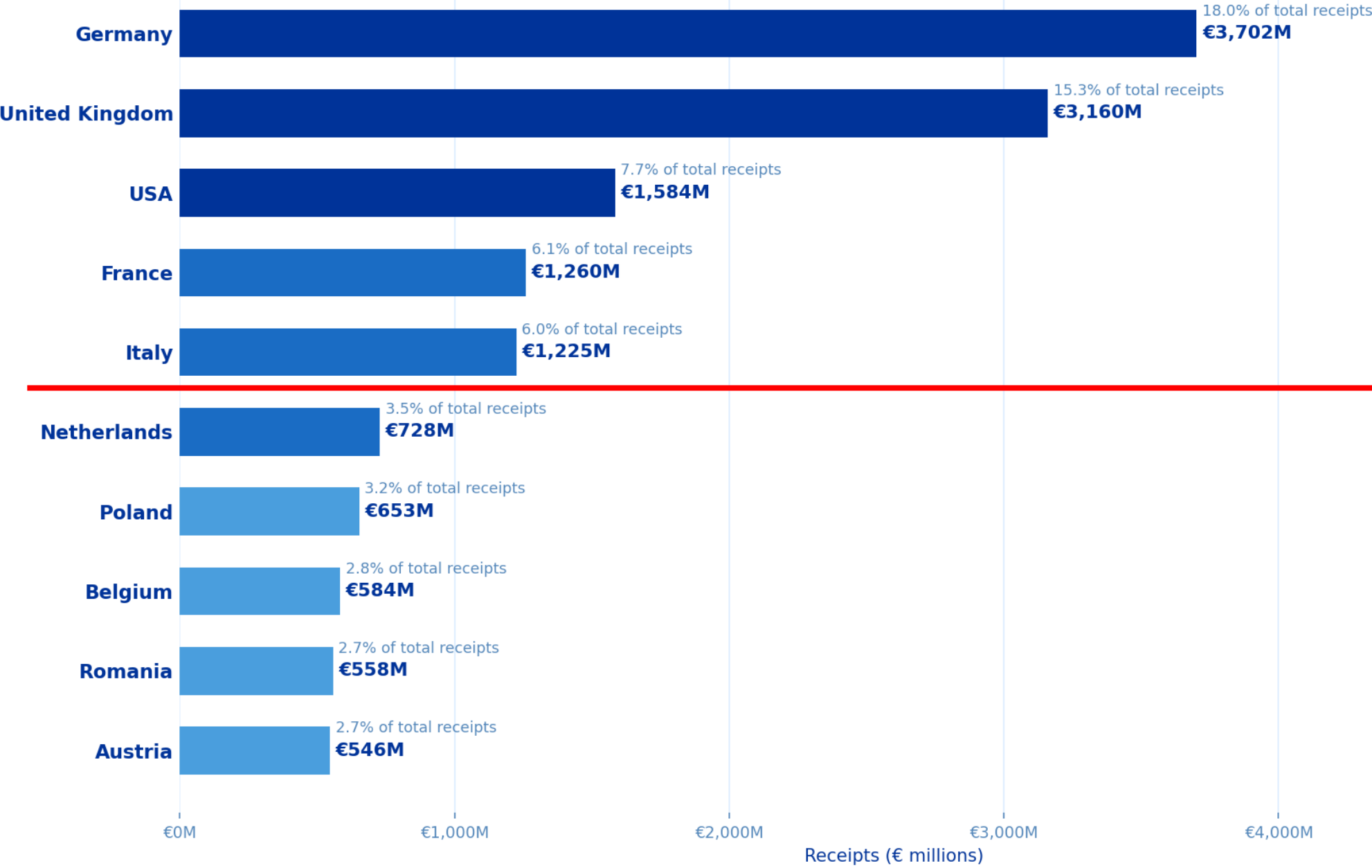


€ <23.5 bi. Receipts



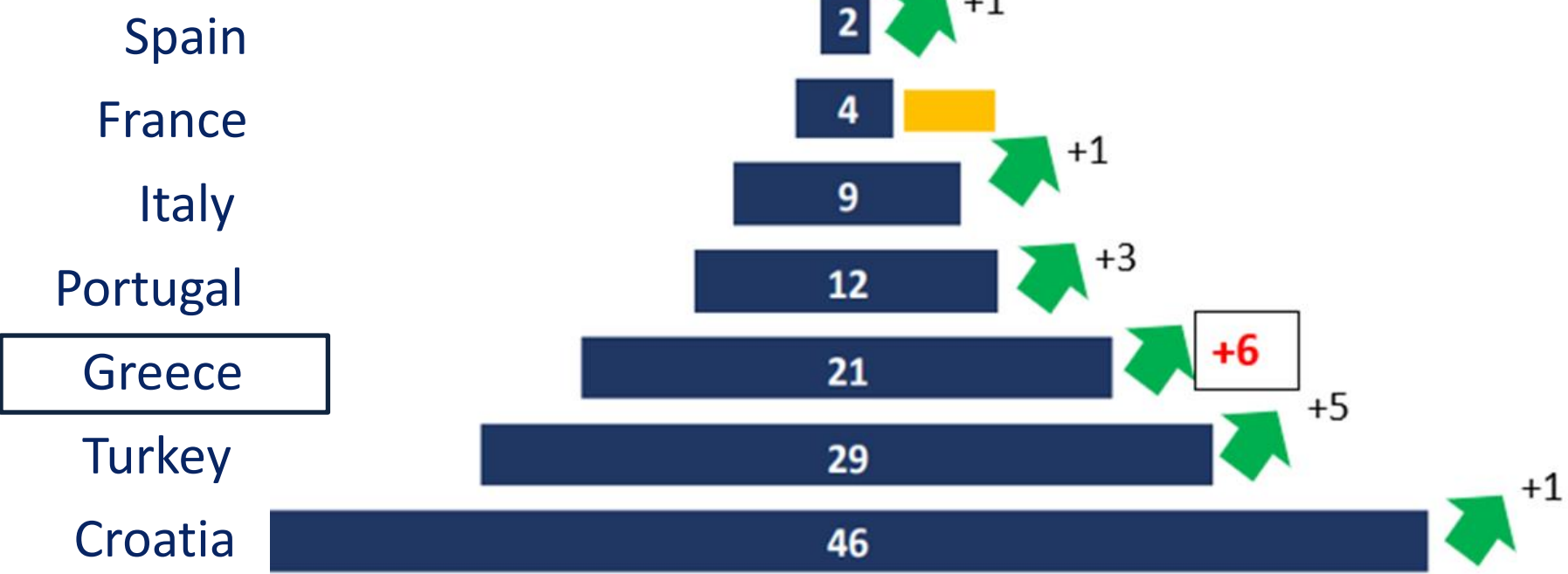
Source: Bank of Greece – Processing INSETE Intelligence. Cruise data included

Inbound Tourism: Greece's Top Spenders



Source: INSETE, 2024

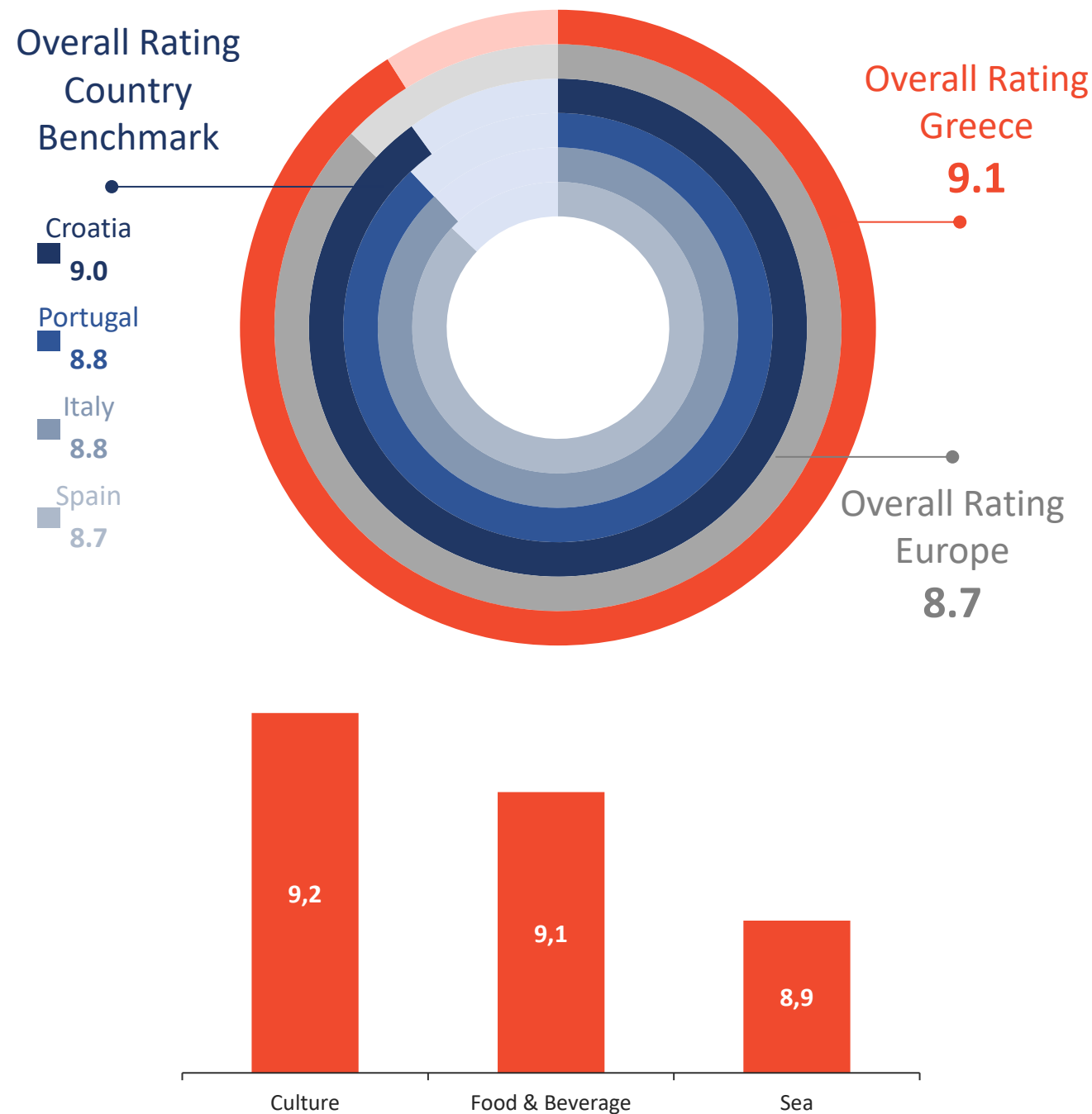
Travel & Tourism Development Index Ranking 2024



Source: World Economic Forum

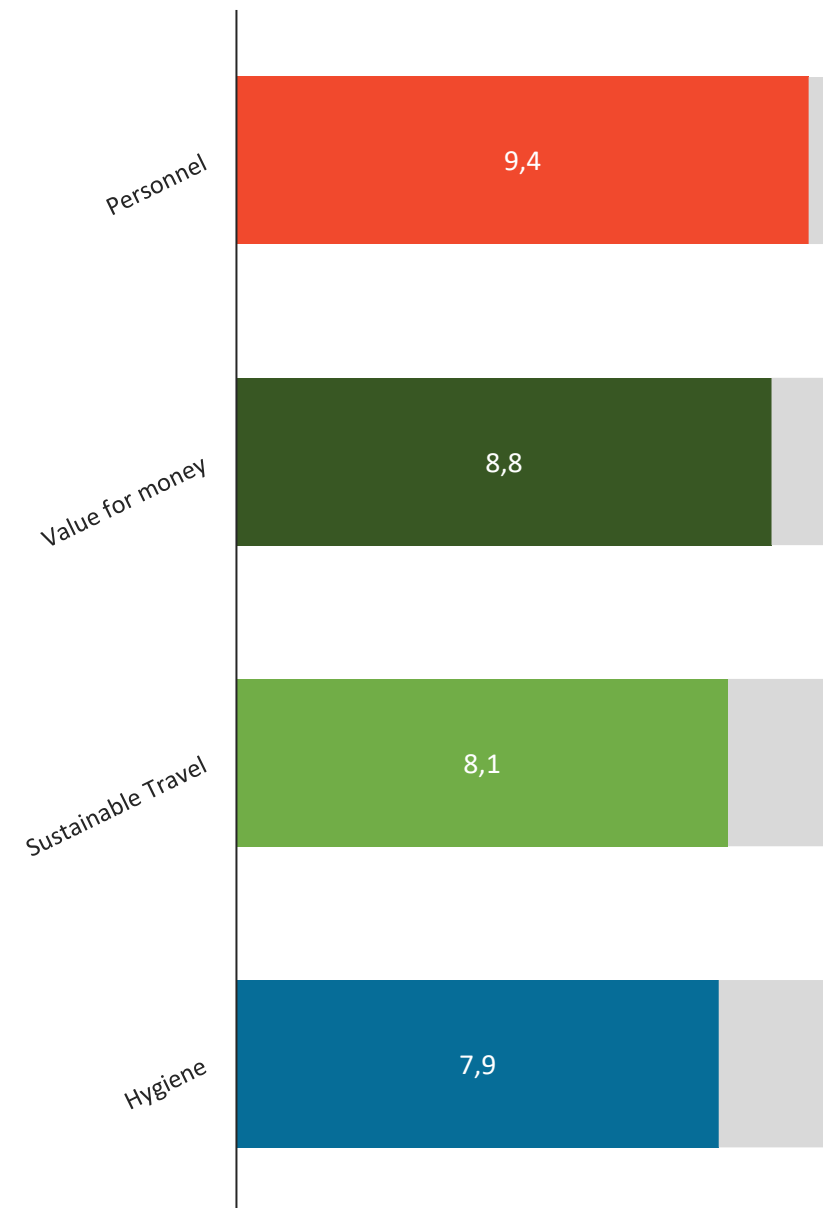
Greece Overall

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN GREECE



Note: Data presented here stems from numerical ratings.

Sentiment Scores



Note: Data presented here stems from written reviews.



Rating per Market

Market	Rating	Review Volume
United States	9.4	5,185
United Kingdom	9.0	6,505
Germany	8.7	2,574
France	8.5	3,459
Italy	8.4	4,645
Greece	8.5	1,308

Note: Data presented here stems from numerical ratings. The markets reported are based on review count.

Period of analysis: July 1st, 2025 - September 30th, 2025. **Review Count:** 319,872

Top motives: relaxation – new places / cultures

Followed by weather in Europe, new activities in USA, AUS

High score for gastronomy and experiences as well

	Germany	France	UK	Italy	USA
Experiencing a new place / culture	46,9%	46,8%	53,3%	51,7%	46,6%
Enjoying yourself / relaxing	37,0%	47,4%	70,2%	50,6%	58,1%
To enjoy better weather	36,1%	30,0%	48,2%	16,6%	20,9%
To do new / exciting activities	33,6%	20,2%	29,5%	22,7%	41,2%
Explore the outdoors / adventure	31,0%	32,4%	26,6%	24,1%	30,3%
To try new food	27,8%	27,7%	28,3%	29,8%	32,1%
Once-in-a-lifetime experience	22,1%	26,3%	20,1%	25,5%	31,3%
Luxury / treating yourself / others	17,4%	15,1%	34,8%	4,3%	29,5%
To visit religious monuments / sites	8,6%	29,0%	8,0%	28,6%	8,8%
To watch sport	5,6%	5,0%	7,6%	3,6%	9,7%
Other	4,6%	5,9%	6,4%	4,6%	7,6%

Source: GWI

In the next 12 months, what are your reasons for taking vacations abroad?

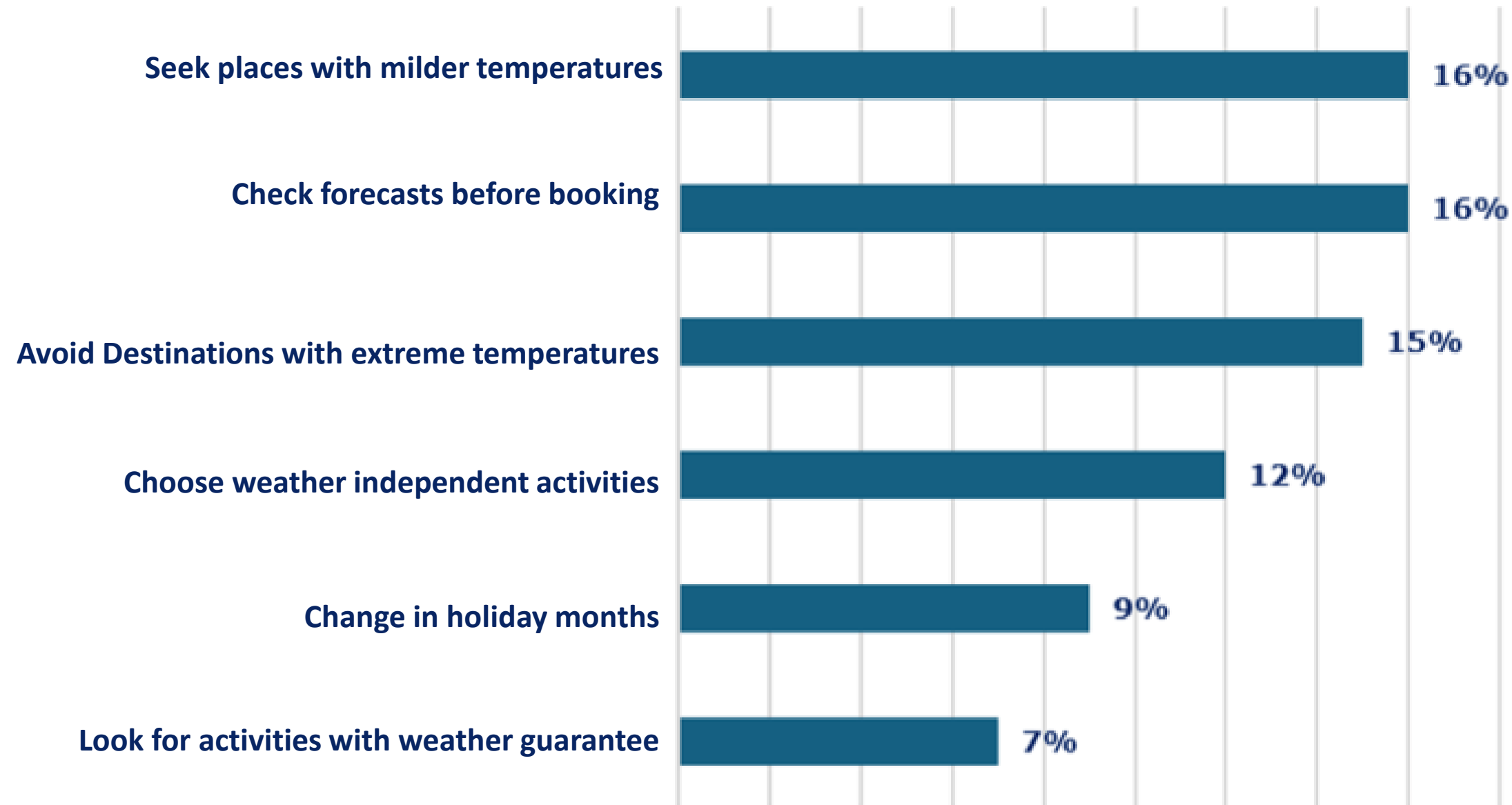


Megatrends

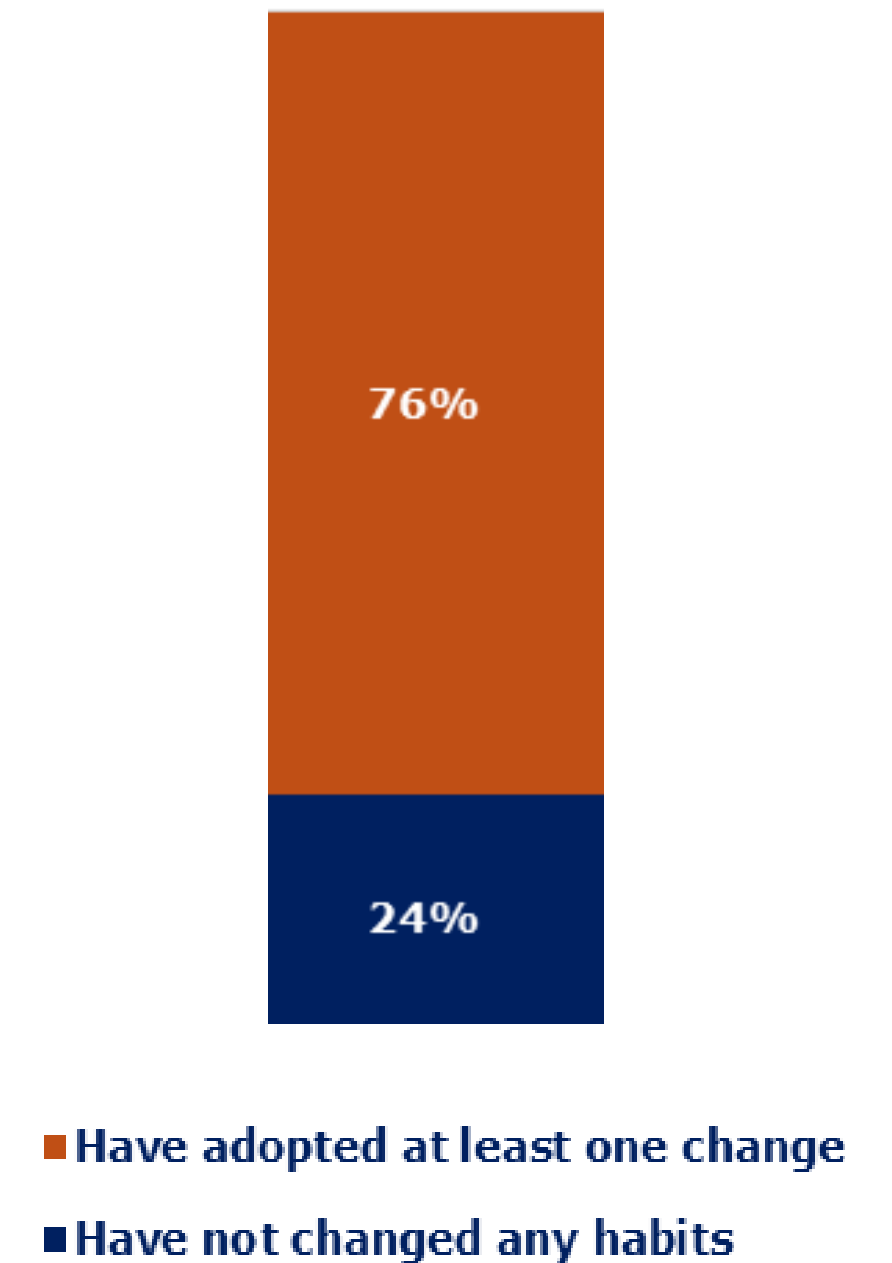
Seasonality Insights

Q 2025	%Δ Receipts vs 2024	%Δ Arrivals Vs 2024	Performance Status	Main Takeaway
Q1	4,3%	5,4%	Stable	Moderate organic growth in low season.
Q2	12,8%	-0,6%	High Efficiency	Significant revenue boost despite fewer arrivals.
Q3	6,9%	6,2%	Market Leader	Dominates 50%+ of the total annual market.
Q4	15,5%	14,4%	Growth	Fastest expansion; proof of season extension.

Europeans are adjusting their travel habits according to climate change



Source: ETC Monitoring Sentiment for Intra-European Travel Autumn & Winter 2025/2026



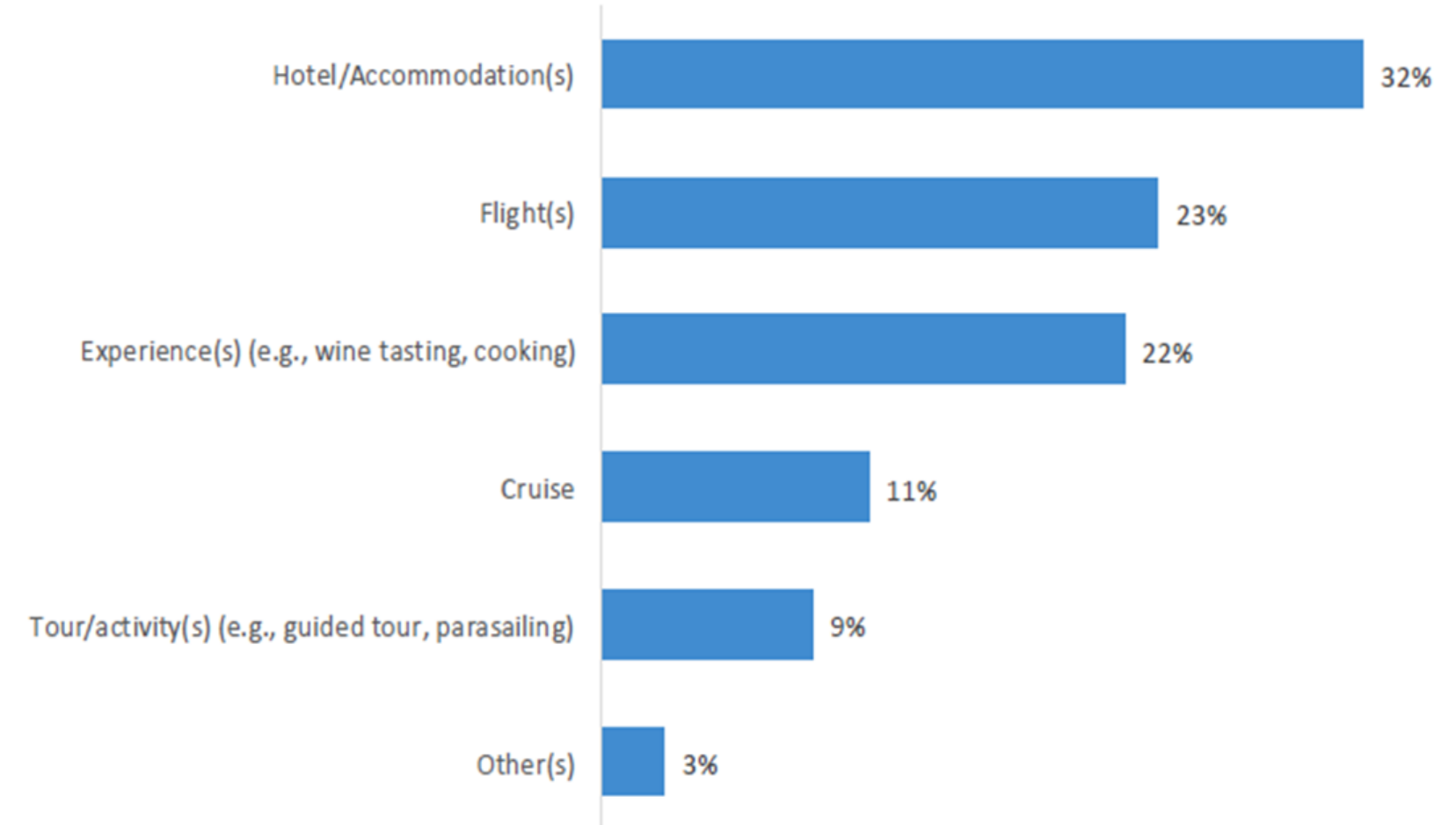
Sustainability as a priority in travel spending

25%



of respondents paid more for a more sustainable travel option (only the extra cost compared to a non-sustainable alternative) in the past 12 months

Part of the Trip for which the Respondent Paid More for a Sustainable Option, Q3 2023



Source: Skift Research U.S. Travel Tracker, Q3 2023. N=1,030
(Business travelers N=~143 and travelers traveling for personal purposes N=~887)

METRON

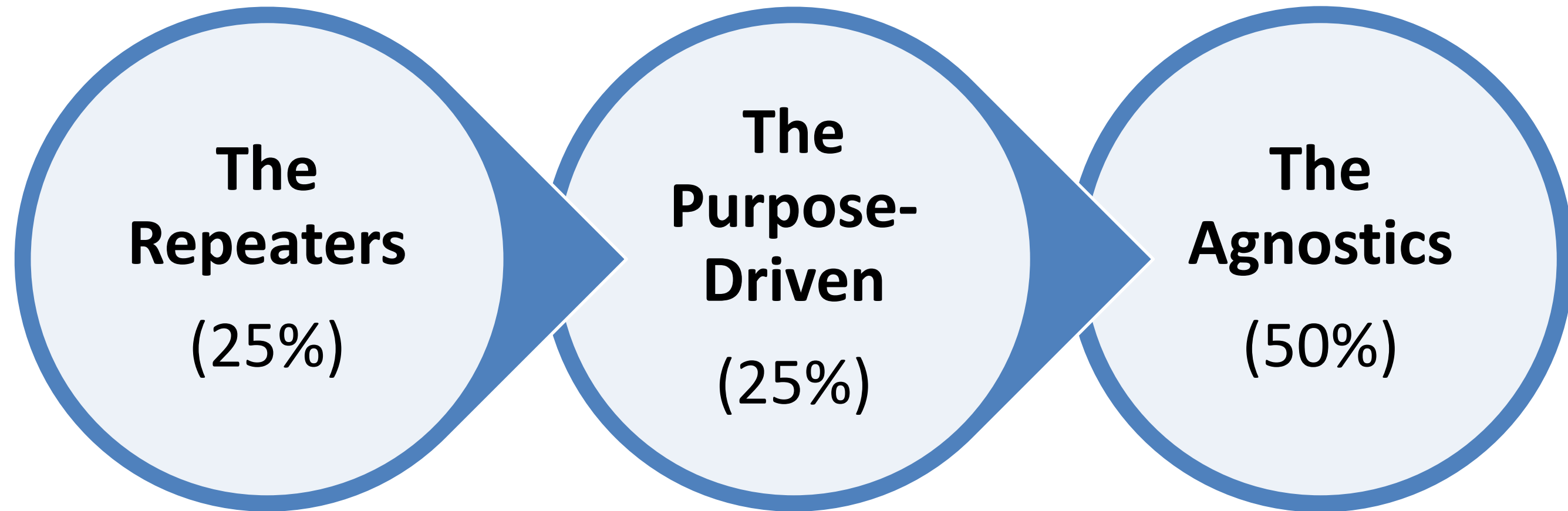
Sustainable Tourism

Powered By **SETE**

Η Ψηφιακή Πλατφόρμα



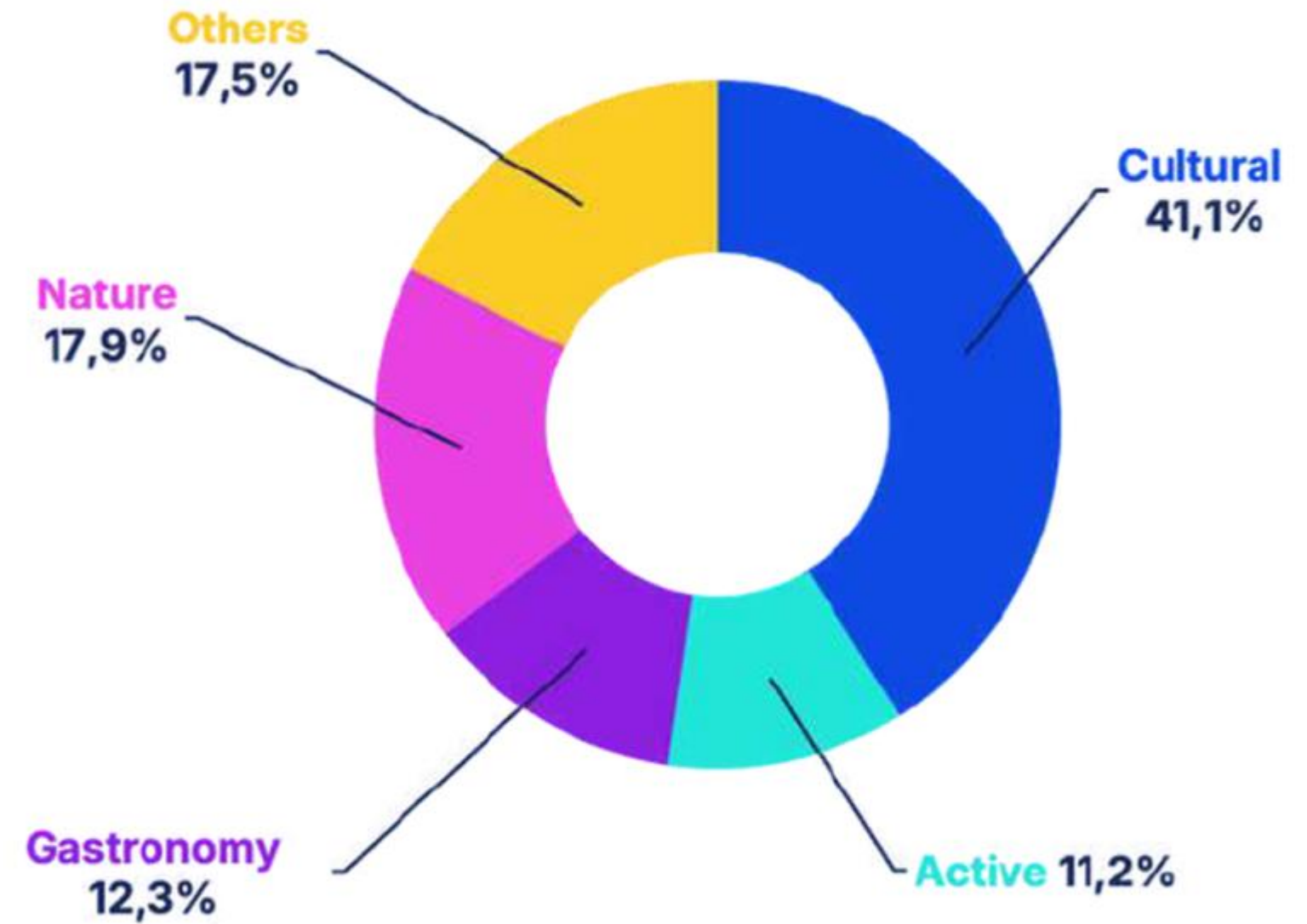
The “anywhere” query



Source: European Tourism Day 2026 Conference

The “experience” first

Activities & experiences key to diversify and to redistribute demand



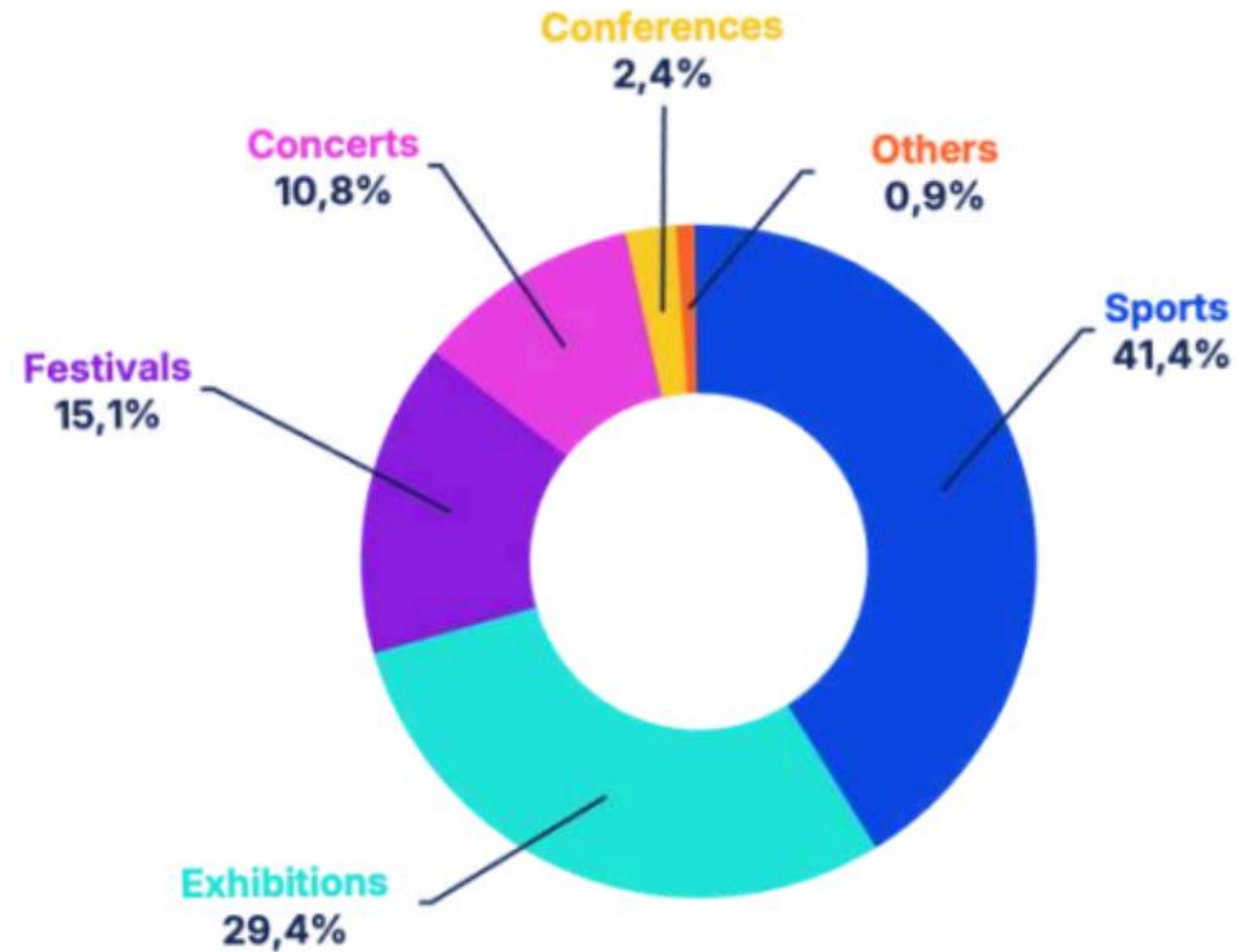
Source: Mabrian and Data Appeal

The power of “live tourism”

Sports and exhibitions drive the most tourism spending around events in Europe

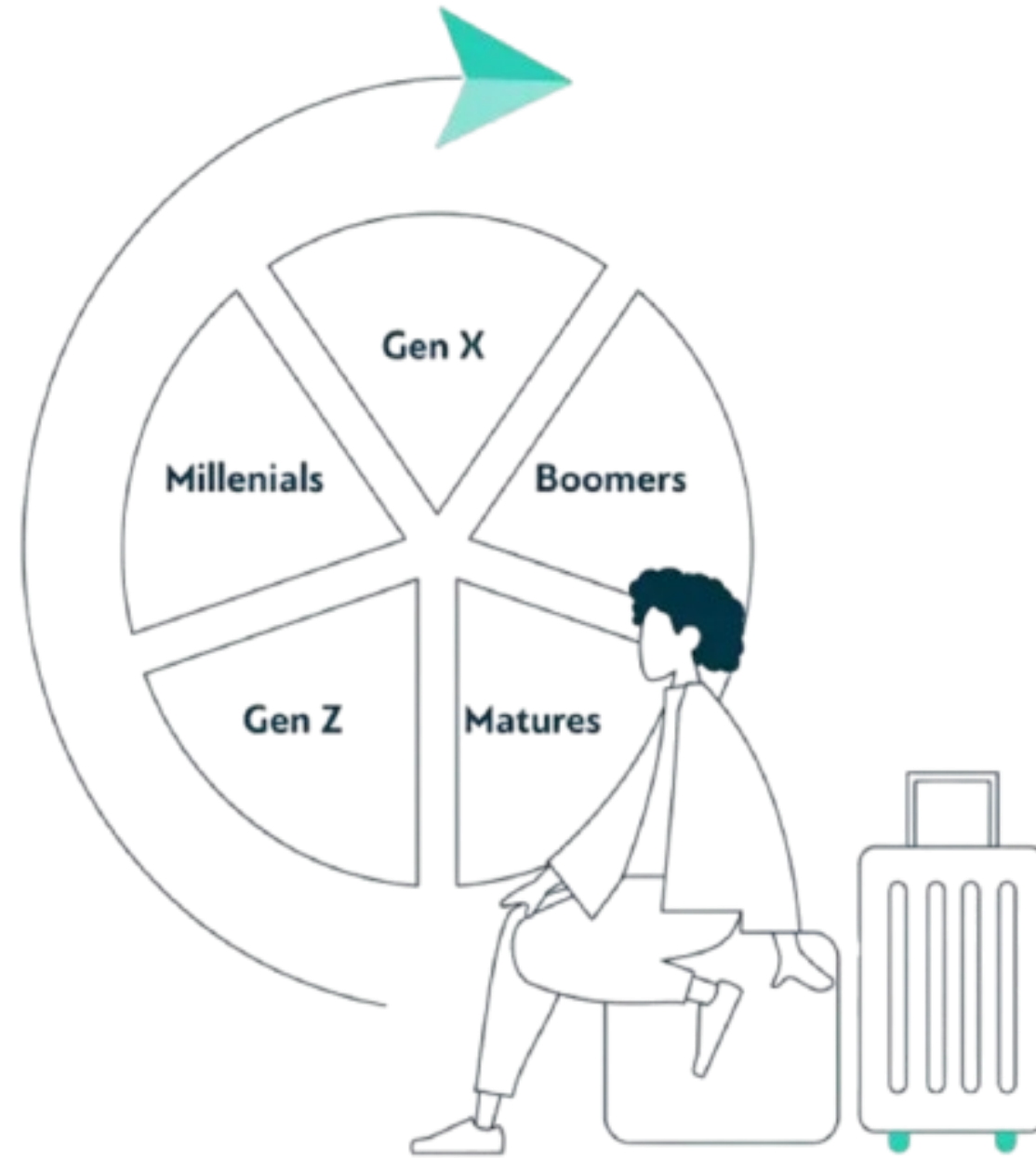
+7%

Compared to last year, tourism economic impact of events in Europe grew

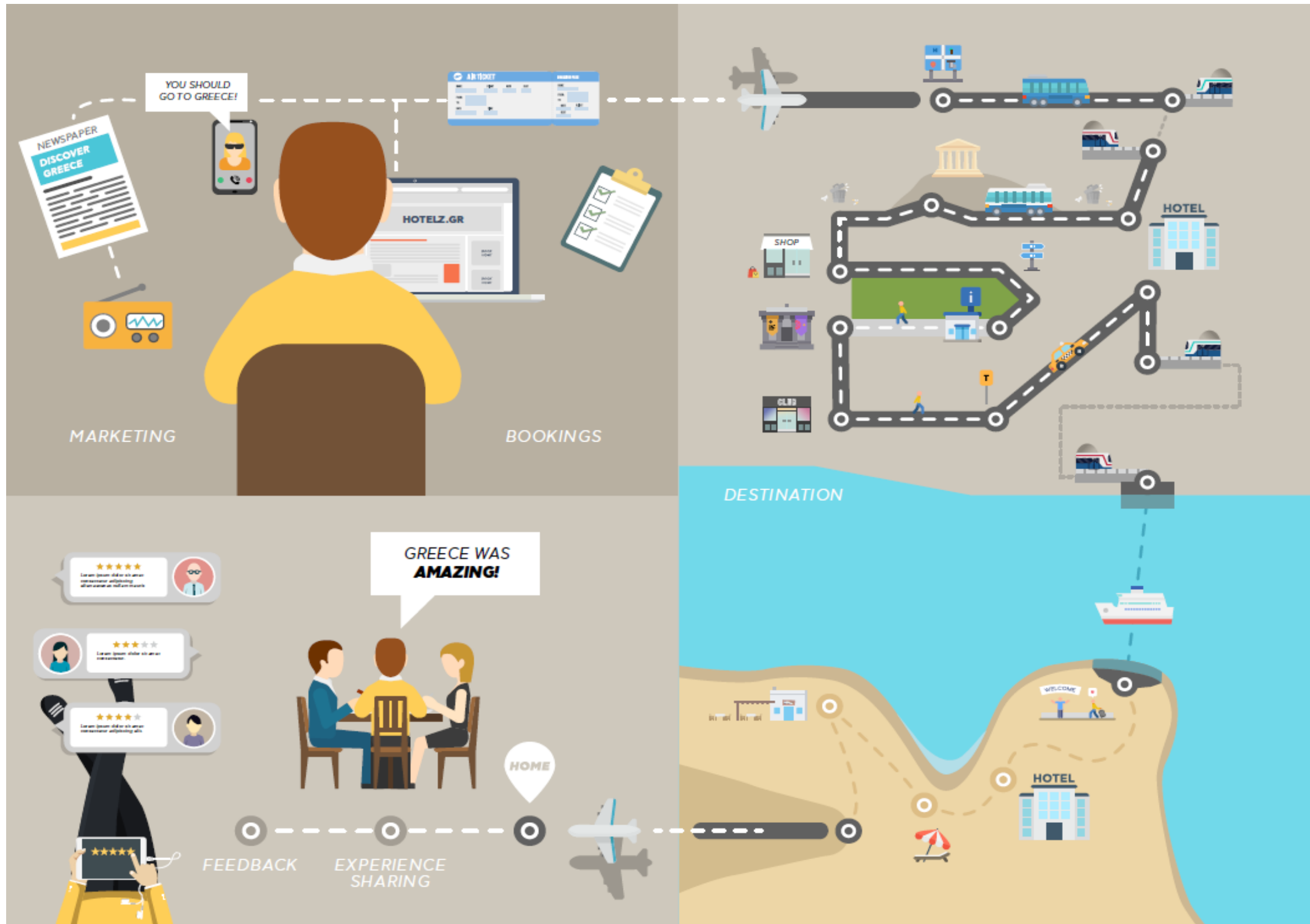


Source: Mabrian and Data Appeal

Travel Trends by Age



AI, Hyperconnectivity & Digitalization



“

Automating the predictable so it can **humanise** the exceptional.

”

An aerial photograph of a coastal landscape. The scene features a large body of water with a striking turquoise hue, indicating shallow depths. Several sailboats are anchored in the water. The land is rugged and rocky, with sparse, low-lying vegetation. In the background, more landmasses and mountains are visible under a clear sky. The text "Way Ahead..." is overlaid in the center of the image.

Way Ahead...

Main Challenges



- Seasonality
- Concentration
- Overcrowding
- Infrastructure
- Climate Change
- Labour shortages

Destination
Management

Macroeconomics / Geopolitics

#Resilience



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