

# Greece

## Tourism in the economy and outlook for recovery

Tourism is one of the key drivers in the Greek economy. The impact of COVID-19 saw tourism GVA decline 44.8% to EUR 6.4 billion in 2020 to directly contribute 4.4% to the national economy. Employment has been less impacted, with the tourism-related share of the workforce falling to 13.0% in 2021, down 1.4 percentage points from 2019.

International arrivals decreased from 34 million in 2019 to 7.4 million in 2020, down 78%. This caused a decline in travel receipts of EUR 13.9 billion (down 76% compared to 2019). A strong recovery in 2021 saw arrivals return to 15.2 million, but this remained 55.2% below 2019 levels. Domestic tourists declined to 4.5 million in 2020 (down 14.1% compared to 2019), before increasing to 4.8 million in 2021.

Domestic and international tourists spent 73.9 million nights in registered accommodation in 2021. Despite signs of recovery, this was still 48.5% below 2019 levels. International tourism remains vital to the Greek tourism economy, accounting for 80% of nights in 2021.

## Tourism governance and funding

The Ministry of Tourism shapes Greece's tourism policy and international marketing strategy, introduces legislation on tourism, undertakes tourism planning and ensures co-operation with other ministries and local administration. Another part of its mission is the implementation of tourism education and training programmes to improve the quality and competitiveness of Greek tourism.

The Ministry of Tourism operates 14 Regional Tourism Offices, which aim to ensure a high-quality tourism product. The Regional Tourism Offices are responsible for: licensing, conducting quality control regarding the services provided by tourism businesses, monitoring the official classification of tourist accommodation, and imposing administrative sanctions on tourism businesses.

The Executive Structure for the Tourism Sector is responsible for the National Strategic Reference Framework for the Tourism Sector. The Special Service for the Promotion and Licensing of Tourism Investments acts as a "one-stop-shop" aimed at boosting and facilitating major tourism investments by providing full and personalised support to investors at all stages of the planned investment.

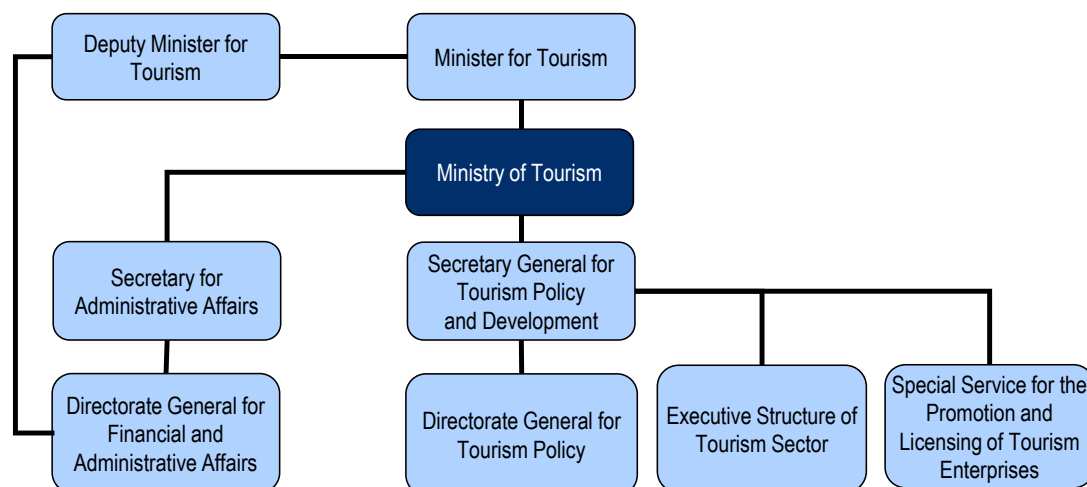
The Department of Tourism Policy Planning is responsible for developing adequate short- and long-term marketing strategies to promote Greece as a tourist destination. It also participates in co-operation schemes with the Ministry of Foreign Affairs. The Department of International Relations and EU Affairs is responsible for EU affairs, bilateral and multilateral co-operation in tourism, and the representation of Greece in tourism-related international organisations. The Department of Special Forms of Tourism is responsible for planning, promoting and regulating matters related to thematic and special forms of tourism. It works together with other ministries (e.g. Health, Culture and Sports, Maritime Affairs and Insular Policy and Rural Development and Food) and co-operates with thematic tourism stakeholders).

For the development of smooth processes to facilitate both safe and seamless travel during the pandemic, intense co-operation was developed with the Ministries of Foreign Affairs, Health and Digital Governance, the former General Secretariat for Civil Protection and the National Civil Aviation Authority.

Local administrations (regions and municipalities) draw up and implement programmes and activities for tourism development and promotion in the areas under their jurisdiction. All promotional activity is aligned with the national tourism promotion strategy.

The total budget for tourism in Greece was EUR 55.1 million in 2019 and EUR 68.3 million in 2020.

### Greece: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2022.

### Tourism policies and programmes

Greece pursues sustainable tourism development within the context of broader economic and regional development planning. Strategic planning to fulfil the aims of the national tourism policy involves extending the tourism season, dispersing tourism demand throughout the country, focusing on quality tourism, developing synergies with the private sector and boosting tourism investments. Measures focus on greater integration of tourism into national strategic planning, policies to strengthen tourism governance, support for tourism investment, promotion of skills development, encouragement of the sector's digitalisation and fostering of sustainable destination management.

The National Recovery and Resilience Plan (Greece 2.0) funds individual projects for tourism development. These projects include developing mountain, health and wellness tourism and agrotourism and gastronomy, improving marine and coastal infrastructure, implementing accessibility improvements, and promoting upskilling and reskilling in tourism through programmes to upgrade existing and acquire new skills.

The Ministry's Annual Action Plan 2022 includes projects aimed at establishing and implementing the national strategy for sustainable tourism development and the optimal management of the individual tourism destinations of the country. There is also a focus on measuring and monitoring sustainable tourism development through the establishment of a National Sustainable Tourism Observatory, local Sustainable Tourism Observatories and Tourism Satellite Accounts.

The following projects are also being implemented:

- Digital Transformation of the Greek National Tourism Organisation (GNTO), with four sub-projects: the creation of a digital tourist map; the creation of a digital repository of the country's cultural assets; the development of an innovative information system for tourists and citizens based on second-generation artificial intelligence technology; and the digitisation of GNTO's historical archive.
- Creation of a unique electronic register for tourism enterprises (e-MHTE) to improve the quality of services and enhance interoperability with new applications and systems.

At the same time, the National Strategic Plan for Tourism Development (NSSTA) is under elaboration, i.e. the development of a ten-year integrated national strategic plan for tourism development entitled the National Pact for Sustainable Tourism 2021-30. Key axes are product development and visibility, accessibility and connectivity, sustainable management and development, quality private and public infrastructure, and funding opportunities.

A Tourism Crisis Management Plan and a Crisis Communication Strategy in Greece covers a wide range of potential crises that can impact tourism, including health, environmental, economic, and societal crises. Both plans aim to increase the effectiveness and agility of the Greek tourism sector in responding to eventual future challenges.

### A new governance framework for destination management in Greece

Greece's Ministry of Tourism has recognised the need for enhanced co-operation between local authorities and the central government in light of the complex development challenges of its destinations. As a result, the Ministry enacted new legislation providing for a new governance framework to establish and operate Destination Management and Marketing Organisations (DMMO) and Tourism Sustainable Development Observatories.

The DMMOs aim to improve the governance of individual tourism destinations, facilitate co-operation among various authorities at the local and regional levels, and form a quality, competitive, and sustainable tourism product. Furthermore, a Sustainable Tourism Development Observatory within each DMMO will make available and monitor the necessary data for the integrated planning of tourism strategies. This approach helps identify destination management gaps and avoids overlapping functions regarding destination promotion. The establishment of a Sustainable Tourism Development Observatory in each above DMMO is funded by the Recovery and Resilience Facility.

## Statistical Profile

### Greece: Domestic, inbound and outbound tourism

|  | 2017    | 2018    | 2019    | 2020   | 2021    |
|--|---------|---------|---------|--------|---------|
| <b>TOURISM FLOWS, THOUSAND</b>                       |         |         |         |        |         |
| <b>Domestic tourism<sup>1</sup></b>                  |         |         |         |        |         |
| Total domestic trips                                 | 24 650  | 26 301  | 27 879  | 23 507 | 21 899  |
| Overnight visitors (tourists)                        | 5 492   | 5 691   | 5 180   | 4 448  | 4 831   |
| Same-day visitors (excursionists)                    | 19 158  | 20 610  | 22 699  | 19 059 | 17 069  |
| Nights in all types of accommodation                 | 21 975  | 24 064  | 23 623  | 12 277 | 14 963  |
| Hotels and similar establishments                    | 21 189  | 23 209  | 22 682  | 11 685 | 14 360  |
| Other collective establishments                      | 785     | 855     | 941     | 593    | 603     |
| Private accommodation                                | ..      | ..      | ..      | ..     | ..      |
| <b>Inbound tourism</b>                               |         |         |         |        |         |
| Total international arrivals                         | 30 161  | 33 072  | 34 005  | 7 406  | 15 246  |
| Overnight visitors (tourists)                        | ..      | ..      | ..      | ..     | ..      |
| Same-day visitors (excursionists)                    | ..      | ..      | ..      | ..     | ..      |
| Top markets  |         |         |         |        |         |
| Germany  | 3 706   | 4 381   | 4 026   | 1 526  | 3 001   |
| United Kingdom                                       | 3 002   | 2 943   | 3 499   | 1 069  | 1 591   |
| France   | 1 420   | 1 524   | 1 542   | 469    | 1 175   |
| Italy  | 1 441   | 1 667   | 1 553   | 373    | 806     |
| Bulgaria   | 2 546   | 3 135   | 3 883   | 663    | 762     |
| Nights in all types of accommodation                 | 213 516 | 230 727 | 236 547 | 64 172 | 133 735 |
| Hotels and similar establishments                    | ..      | ..      | ..      | ..     | ..      |
| Other collective establishments                      | ..      | ..      | ..      | ..     | ..      |
| Private accommodation                                | ..      | ..      | ..      | ..     | ..      |
| <b>Outbound tourism</b>                              |         |         |         |        |         |
| Total international departures                       | 7 685   | 7 961   | 7 848   | 2 324  | 2 026   |
| Overnight visitors (tourists)                        | ..      | ..      | ..      | ..     | ..      |
| Same-day visitors (excursionists)                    | ..      | ..      | ..      | ..     | ..      |
| Top destinations                                     |         |         |         |        |         |
| Germany  | 421     | 500     | 584     | 227    | 225     |
| Bulgaria   | 2 186   | 2 371   | 1 916   | 617    | 212     |
| Italy  | 351     | 405     | 438     | 146    | 184     |
| North Macedonia                                      | 1 787   | 1 352   | 1 138   | 343    | 174     |
| Cyprus   | 214     | 255     | 239     | 134    | 171     |
| <b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b> |         |         |         |        |         |
| <b>Inbound tourism</b>                               |         |         |         |        |         |
| Total international receipts                         | 16 621  | 18 444  | 20 618  | 5 353  | 11 621  |
| International travel receipts                        | 14 630  | 16 086  | 18 179  | 4 319  | 10 503  |
| International passenger transport receipts           | 1 991   | 2 359   | 2 439   | 1 034  | 1 119   |
| <b>Outbound tourism</b>                              |         |         |         |        |         |
| Total international expenditure                      | 2 920   | 3 314   | 3 764   | 1 321  | 1 891   |
| International travel expenditure                     | 1 905   | 2 191   | 2 744   | 793    | 1 113   |
| International passenger transport expenditure        | 1 015   | 1 123   | 1 021   | 528    | 778     |

.. Not available; | Break in series

1. Trips from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/qehykj>

## Greece: Enterprises and employment in tourism

|   | Number of establishments | Number of persons employed |                |                |                |                |
|---|--------------------------|----------------------------|----------------|----------------|----------------|----------------|
|   | 2021                     | 2017                       | 2018           | 2019           | 2020           | 2021           |
| <b>Total</b>  | ..                       | ..                         | ..             | ..             | ..             | ..             |
| <b>Tourism industries</b>                                     | <b>77 543</b>            | <b>537 886</b>             | <b>541 285</b> | <b>564 003</b> | <b>535 801</b> | <b>509 037</b> |
| Accommodation services for visitors                           | 52 053                   | 91 333                     | 100 442        | 99 494         | 75 312         | 92 395         |
| Hotels and similar establishments                             | 9 745                    | 86 532                     | 94 700         | 93 635         | 69 635         | 84 689         |
| Food and beverage serving industry                            | ..                       | 263 222                    | 266 227        | 287 398        | 273 443        | 239 031        |
| Passenger transport   | ..                       | 105 355                    | 99 643         | 99 748         | 105 346        | 104 301        |
| Air passenger transport                                       | ..                       | 7 539                      | 4 712          | 3 804          | 5 840          | 8 592          |
| Railways passenger transport                                  | ..                       | 78 450                     | 87 027         | 87 404         | 59 153         | 73 534         |
| Road passenger transport                                      | 9 097                    | 2 665                      | 2 000          | 2 322          | 3 943          | 2 756          |
| Water passenger transport                                     | ..                       | 65 310                     | 63 740         | 62 783         | 65 912         | 55 033         |
| Passenger transport supporting services                       | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Transport equipment rental                                    | ..                       | 3 762                      | 6 094          | 7 224          | 5 244          | 4 186          |
| Travel agencies and other reservation services industry       | 6 554                    | 20 138                     | 14 136         | 15 251         | 17 483         | 16 456         |
| Cultural industry   | ..                       | 19 093                     | 17 638         | 19 444         | 17 985         | 17 062         |
| Sports and recreation industry                                | ..                       | 34 982                     | 37 106         | 35 444         | 40 990         | 35 606         |
| Retail trade of country-specific tourism characteristic goods | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Other country-specific tourism industries                     | 94                       | ..                         | ..             | ..             | ..             | ..             |
| <b>Other industries</b>                                       | ..                       | ..                         | ..             | ..             | ..             | ..             |

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/7bzsmg>

## Note by the Republic of Türkiye

The information in this document with reference to “Cyprus” relates to the southern part of the Island. There is no single authority representing both Turkish and Greek Cypriot people on the Island. Türkiye recognises the Turkish Republic of Northern Cyprus (TRNC). Until a lasting and equitable solution is found within the context of the United Nations, Türkiye shall preserve its position concerning the “Cyprus issue”.

## Note by all the European Union Member States of the OECD and the European Union

The Republic of Cyprus is recognised by all members of the United Nations with the exception of Türkiye. The information in this document relates to the area under the effective control of the Government of the Republic of Cyprus.



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