

Greece

Tourism in the economy

Tourism is a central pillar of the Greek economy. In 2016, direct tourism GVA was estimated to be EUR 9.6 billion, which represented 6.4% of national GVA. In the same year, tourism directly supported nearly 366 000 jobs, accounting for approximately one in ten jobs in Greece.

In 2016, Greece received a record number of international tourist arrivals for the fourth consecutive year, totalling 28 million visitors, an increase of 7.5% on 2015. Overnight stays in Greece totalled 193.4 million, up by 2.9% from 188 million in 2015. Visits from EU countries accounted for 61.3% of all arrivals and saw an overall growth of 15% in 2016. In the same year, as far as the cruise sector is concerned, 4 093 cruise ship arrivals (4 375 in 2015) were recorded, while the number of cruise passenger visits was stable at 5.1 million.

Domestic tourism in Greece was estimated to account for 5.8 million trips and 57 million overnight stays in 2015 (down 10.2% from 2014). The vast majority of these trips (over 90%) were for leisure purposes, however, nearly two-thirds (64%) of total trips and over three-quarters (78.4%) of total nights were spent in non-commercial accommodation.

Tourism governance and funding

Acknowledging the importance of tourism as a crucial factor in the Greek economy, a separate Ministry of Tourism was established in November 2016. The Ministry formulates the country's tourism policy, introduces legislative reforms, undertakes tourism planning and coordinates activities with other ministries in order to boost investment and improve the quality and competitiveness of Greek tourism. A number of directorates are responsible for the various functions of the Ministry. Within this structure, the National Strategic Reference Framework Executive (NSRF) reports directly to the Secretary General for Tourism Policy and Development, and contributes to the formulation of proposals which lead to specific tourism projects.

The Greek National Tourism Organisation (GNTO) is a public entity under the supervision of the Ministry. Its mission is to organise, develop and promote Greek tourism, within the country and worldwide, utilising its 16 overseas offices.

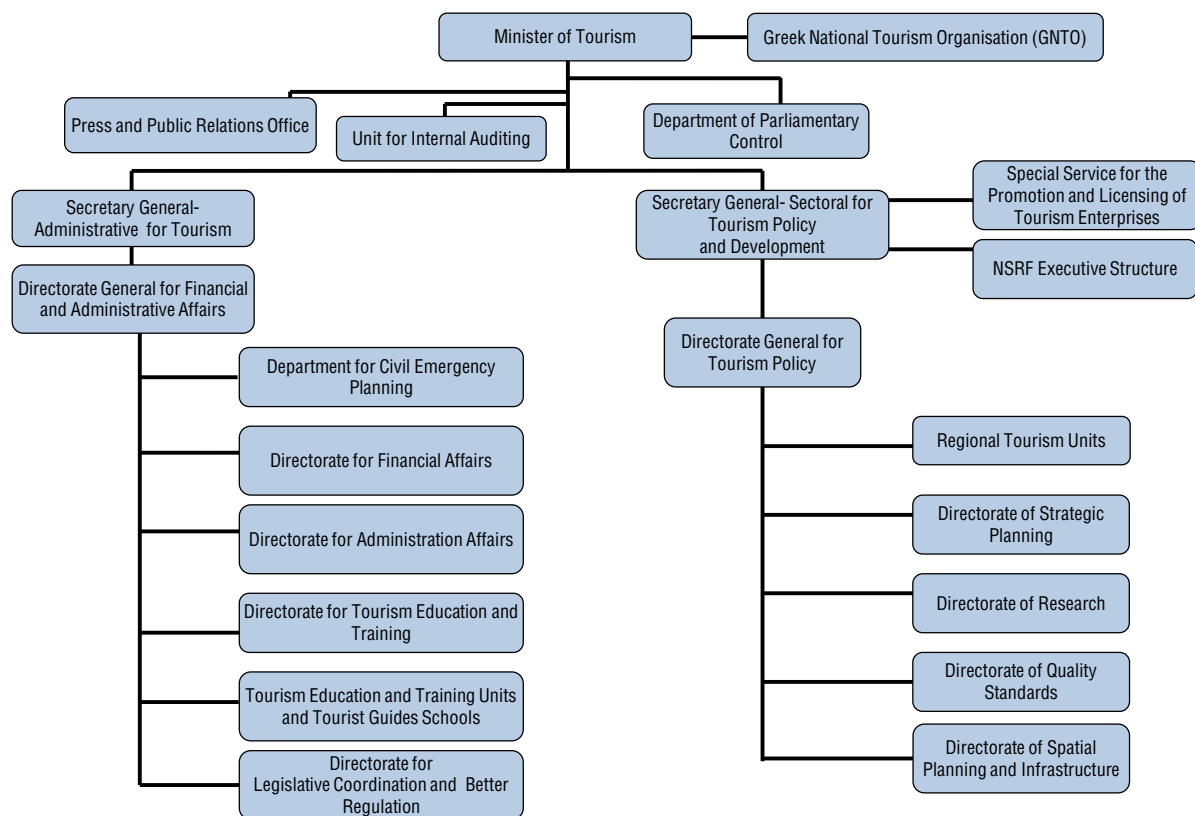
The Hellenic Chamber of Hotels is the state's institutional consultant and the competent authority responsible for the official classification of hotels, rooms and apartments for rent.

The Ministry of Tourism has 14 Regional Tourism Offices, located in each region, which have responsibility for licensing and inspecting tourism businesses, conducting quality control, monitoring official classification and imposing administrative sanctions on tourism businesses.

At the local level, Regions and Municipalities design and implement programmes and activities for tourism development and promotion. These activities are not financed by the central government; local authorities make use of their own resources or European programme funds. Regarding tourism promotion activities in particular, it is mandatory for all public (national or local) authorities to obtain prior approval from the GNTTO, with a view to harmonising tourism promotion campaigns with the overall tourism promotion strategy of the country.

In 2016 the budget of the Ministry of Tourism was EUR 49 million. Of this, EUR 26 million comes from the regular budget, with a further public investment budget made up of approximately EUR 10 million from national sources (used for promotional activities by GNTTO), and EUR 13 million from EU co-financing (used for innovation, infrastructure, projects, skills and SME support).

Greece: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2018.

Tourism policies and programmes

Since 2015 the Ministry of Tourism has been implementing a New Tourism Policy to promote Greece as a globally attractive destination offering unique and authentic travel experiences, 365 days a year. All initiatives are geared towards increasing international travel share, further enriching the tourism offer, and enhancing competitiveness. The strategic pillars are:

- Extending the tourism season by innovative product development in close co-operation with all 13 Regions.

- Promoting new thematic tourism products and special interest tourism with an emphasis on cultural tourism, pilgrimage tourism, cruises, yachting, diving parks, wellness and spas, medical tourism, MICE, luxury tourism, city-breaks, and Greek gastronomy.
- Targeting new dynamic source-markets (Middle East, China, South Korea, and as of 2017 India) while enhancing Greece's presence in traditional markets in Europe, Russia and the United States.
- Increasing air connectivity/direct flights from central and regional foreign airports to existing and new destinations in Greece.
- Attracting investments of high quality and added value to upgrade the overall tourism product and accommodate the expected increase in demand in the coming years.
- Creating and promoting synergies with other economic sectors (e.g. agri-food, manufacturing).

In response to this strategy, a number of specific actions have been implemented to increase tourism flows and lengthen the season. For example, the Minister of Tourism supported the introduction of a direct year-round Athens-New York service by Emirates, which is expected to generate consistently high demand and enhance business, culture and leisure connections on both sides of the Atlantic.

In the field of tourism education and training, the core priorities are to provide:

- Tourism enterprises with qualified personnel in order to increasingly improve the quality of the services provide.
- Unqualified employees with opportunities to acquire the necessary skills in order to be more productive and competitive in the labour market.
- Incentives to tourism enterprises to hire qualified personnel.
- Quality education to tourist guides.

Tourism product innovation and upgrade involve:

- Pursuing the proper utilisation of funding instruments available within the framework of the NSRF.
- Regulating the licensing and general functioning of different types of tourism businesses (including lodgings, ski centres, mountain shelters, thermal establishments, travel and tourism agencies, and chauffeuring services), through a set of Joint Ministerial Decisions.
- Streamlining the legal and regulatory framework concerning domestic and foreign investment. To this end, a comprehensive “Codification of Tourism Legislation” was completed and implemented, with the purpose of reducing administrative-regulatory barriers, improving the business environment, and thereby promoting transparency and increased investment in the tourism sector (Box 1.18).

Statistical profile

Table 1. Greece: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	6 257	4 615	5 340	4 842	4 590
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	45 246	47 955	53 212	48 660	46 438
Hotels and similar establishments	4 596	4 491	5 487	5 275	4 405
Specialised establishments	956	537	609	481	528
Other collective establishments	571	356	833	402	367
Private accommodation	39 123	42 571	46 282	42 503	41 139
Inbound tourism					
Total international arrivals	16 947 |	20 111	24 272	26 114	28 071
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	2 109 |	2 268	2 459	2 810	3 139
United Kingdom	1 921 |	1 846	2 090	2 397	2 895
Bulgaria	599 |	692	1 535	1 901	2 523
Former Yugoslav Republic of Macedonia	1 300 |	1 692	2 347	3 023	1 721
Italy	848 |	964	1 118	1 355	1 387
Nights in all types of accommodation	142 417 |	162 918	186 927	188 012	193 419
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	4 681	4 594	5 802	6 291	7 235
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Former Yugoslav Republic of Macedonia	1 185	1 393	1 800	1 979	1 923
Bulgaria	509	536	751	1 109	1 557
Turkey	533	524	716	652	803
Germany	417	357	469	400	444
Italy	286	310	292	297	364
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	11 293	13 168	14 652	15 569	13 207 p
International travel receipts	10 443 e	12 152	13 393	14 126	13 207 p
International passenger transport receipts	850	1 016	1 259	1 443	..
Outbound tourism					
Total international expenditure	2 232	2 837	3 014	3 191	2 006 p
International travel expenditure	1 844 e	1 835	2 076	2 037	2 006 p
International passenger transport expenditure	388	1 002	937	1 154	..

.. Not available; | Break in series; e Estimated value; p Provisional data
Source: OECD Tourism Statistics (Database).



StatLink  <http://dx.doi.org/10.1787/888933640158>

Table 2. **Greece: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	60 595	286 392	274 131	320 003	347 756	365 892
Accommodation services for visitors	48 864	66 741	60 639	75 931	75 068	79 615
Hotels and similar establishments	48 864	59 281	54 333	69 617	67 851	72 238
Food and beverage serving industry	..	205 235	198 122	220 539	249 681	261 484
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	6 521	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	2 496	2 083	2 205	4 002	3 921
Travel agencies and other reservation services industry	5 170	11 920	13 287	21 328	19 005	20 872
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	40	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933640177>



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