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The editors

Aris Ikkos
Research Director
INSETE Institute

Evangelia Lamprou
Researcher – Statistician
INSETE Institute

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Summary

This special edition of the Statistical Bulletin presents tourism data for 2020, a year marked by the COVID-19 pandemic and the measures used to address it. The impact on tourism has been particularly heavy, both at a national and at an international level:

- A decrease of -74% (from 1.5 billion to 381 million) in arrivals was recorded internationally. Europe showed a decrease of -70% (from 746 million to 221 million).
- According to Bank of Greece data, travel receipts in 2020 decreased by -76.5% compared to 2019 and amounted to €4,280 million. In 2020, inbound travel flows decreased by -76.5% and came to 7,375 thousand travellers compared to 31,348 thousand travellers over the corresponding period in 2019. The euro area countries showed comparatively the smallest decrease (-69% in arrivals and receipts). This decrease is also reflected in the administrative data on arrivals from abroad:
  - In the period January-December 2020, 5.9 million international airport arrivals were recorded, showing a decrease of -72.5%/-15.6 million arrivals compared to the period January-December 2019 when 21.5 million international airport arrivals were recorded.
  - In the period January-December 2020, 2.6 million international road arrivals were recorded, showing a decrease of -78.7%/-9.7 million arrivals compared to the period January-December 2019 when 12.3 million international road arrivals were recorded.
  - With regard to maritime routes between Greece and Italy, inbound passenger flow is estimated to have decreased by -70% in 2020, while the estimate for the number of passengers comes to 450 thousand compared to 1.5 million in 2019.
  - With regard to cruise travel, arrivals came to 64 thousand in 2020 compared to 5.5 million in 2019 (-99%).
- The picture is similar for domestic flows:
  - In the period January-December 2020, 3.1 million domestic airport arrivals were recorded, showing a decrease of -61.4%/-5 million arrivals compared to the period January-December 2019 when 8.1 million domestic airport arrivals were recorded.
  - Domestic maritime passenger flow for 2020 is estimated at 9.4 million passengers, showing a decrease of -50% compared to 2019 (18.8 million).
- The fall in tourism activity is also reflected in the statistics on hotel activity:
  - According to RIT data, hotel turnover in 2020 amounted to barely €1.8 billion, showing a decrease of -78.1% compared to 2019 when total turnover amounted to €8.3 billion. Moreover, €278 million in receivables was not collected and a decrease of €744 million in advance payments for 2021 burdened the hotels' liquidity.

- According to ELSTAT data, hotel check-ins during the first nine months of 2020 showed a decrease of -69.3% compared to the corresponding period in 2019, while overnight stays were reduced by -73.2%. Despite the significant decrease in the number of inbound visitors, hotels had more foreign than local customers during the summer months (July, August, September).
- In the third quarter of 2020, however, 396 thousand employees were recorded as working in the accommodation and food sectors, compared to 429 thousand employees in 2019, showing a decrease of -8%. This development is probably due to the employment-related support measures taken by the government in response to the COVID-19 pandemic.

- Despite the restrictive measures taken to deal with the coronavirus outbreak and their impact on the operation of hotels, the key experience indicators of their customers show an improvement:
  - The Net Sentiment Index (NSI) of hotel customers showed an improvement compared to 2019, especially during the summer months (77% in July 2020 compared to 73% in July 2019, 74% in August 2020 compared to 69% in August 2019, and 78% in September 2020 compared to 71% in September 2019).
  - An improvement was also recorded in the GRI –Global Review Index– (from 87.1% in 2019 to 87.4% in 2020) and in the individual ratings for Cleanliness (from 90.3% to 91.6%), Food and Drink (from 83.9% to 84.3%), Location (from 86.6% to 87.2%), Service (from 88.8% to 89.5%), Value for Money (from 84.4% to 85.2%), Room (from 83.6% to 84.6%), Entertainment (from 77.6% to 79.2%) and Reception (from 88.2% to 94.0%).

  Regardless of the reasons that led to this improvement –which may be due to either inherent factors, such as improved service, or external factors, such as the travellers' sense of freedom after months of confinement–, it is a significant boost for the 2020 tourist season which strengthens the country’s brand.

1 Introduction

Graph 1: International Arrivals 2020

Global tourism suffered its worst year on record in 2020, with international arrivals dropping by -74% according to the latest data from the World Tourism Organization (UNWTO). Destinations worldwide welcomed 1.1 billion fewer international arrivals in 2020 than in the previous year, due to an unprecedented fall in demand and widespread travel restrictions.

As a typical example, 1.5 billion international tourist arrivals were recorded in 2019, while in 2020 they barely came to 381 million. According to the latest UNWTO World Tourism Barometer, the collapse in international travel represents an estimated loss of $1.3 trillion in export revenues – more than 11 times the loss recorded during the 2009 global economic crisis. The crisis has put between 100 and 120 million direct tourism jobs at risk, many of them in small and medium-sized enterprises.

Europe showed a decrease of -70%, recording 221 million arrivals compared to 746 million in 2019. Greece showed a decrease of -76.5%, recording 7.4 million arrivals compared to 31.3 million in 2019.

Due to the evolving nature of the pandemic, many countries are now reintroducing stricter travel restrictions. These include mandatory testing, quarantines and –in some cases– a complete closure of borders, all weighing on the resumption of international travel.

2 International Arrivals

2.1 International airport arrivals

Table 1:International air arrivals at main Greek airports

2020	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	286.928	116.888	6			1.857	1.204	1		2	5	5			2				20	406.918
February	244.088	112.386				8.324	1.468	22			3	14	279		327		6	8	74	366.999
March	217.801	55.291	121			4.654	553	166			2	1	12	4	748				25	279.378
April		161		13			5	3										1		183
May		11														6				17
June	73.894	12.732		170		2		11			21		20							86.850
July	302.542	114.112	111.372	61.109	2.285	214.312	50.127	84.194	56.131	12.531	16.119	31.754	30.592	5.730	9.008	5.862	7.477	6.340	1.358	1.122.955
August	333.590	123.318	193.600	109.198	4.449	316.174	78.020	159.842	99.308	37.079	30.739	63.342	58.429	4.024	13.642	8.316	15.943	9.898	3.757	1.662.668
September	228.734	86.490	150.388	83.747	1.592	210.597	48.475	107.410	35.532	20.895	21.393	30.624	33.479	2.929	9.784	4.013	9.551	4.731	263	1.090.627
October	203.107	67.850	128.757	67.046		141.449	21.815	52.541	5.726	5.300	6.296	7.033	17.124	1.483	4.400	401	562	1.305		732.195
November	59.070	5.543	1.640	1.065		4.557	114	294	26			34	270		217					72.830
December	73.324	14.376	51			350														88.101
Total	**2.023.078**	**709.158**	**585.935**	**322.348**	**8.326**	**902.276**	**201.781**	**404.484**	**196.723**	**75.807**	**74.578**	**132.807**	**140.205**	**14.170**	**38.128**	**18.598**	**33.539**	**22.283**	**5.497**	**5.909.721**

2019	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	271.630	100.085	48			1.738	1.465						36					1.094	17	376.113
February	251.571	98.359				6.587	1.498						118		248					358.381
March	356.299	123.494	94	168		10.228	2.017	508	150		248		695		1.833					495.734
April	511.163	190.003	102.683	31.851	601	185.666	71.079	62.690	10.538	7.606	4.444	18.189	26.927	351	5.507	1.247	55	906	820	1.232.326
May	593.359	226.466	285.172	154.106	8.351	402.172	152.538	176.333	106.219	41.022	31.678	43.843	59.865	8.000	16.868	14.399	21.450	13.813	6.582	2.362.236
June	699.035	276.261	410.082	207.823	20.174	543.179	203.092	263.264	161.632	62.848	58.891	82.394	91.335	18.947	27.888	26.661	35.894	24.672	11.539	3.225.611
July	864.861	314.485	478.715	247.169	24.357	646.822	223.940	317.577	204.052	76.809	75.183	119.895	114.836	20.183	29.563	32.574	48.264	28.311	14.392	3.881.988
August	876.070	296.237	477.405	248.652	26.264	651.055	205.323	309.733	200.245	77.555	65.780	118.961	107.874	18.032	32.673	31.288	49.396	28.744	14.294	3.835.581
September	734.112	251.622	388.577	191.725	17.511	536.058	181.111	237.129	146.825	53.098	53.100	67.914	79.854	14.658	28.136	26.320	25.861	19.834	10.366	3.063.811
October	563.672	198.624	200.147	96.720	1.827	299.069	95.557	89.576	26.877	11.391	11.348	22.885	38.035	4.283	9.586	4.664	984	5.518	808	1.681.571
November	390.904	119.238	373	69		16.178	2.378	465			26		424		1.062					531.117
December	299.915	146.869	3	4		3.471	1.436	145												451.843
Total	**6.412.591**	**2.341.743**	**2.343.299**	**1.178.287**	**99.085**	**3.302.223**	**1.141.434**	**1.457.420**	**856.538**	**330.329**	**300.698**	**474.081**	**519.999**	**84.454**	**153.364**	**137.153**	**181.904**	**122.892**	**58.818**	**21.496.312**

% Changes	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	5,6%	16,8%	-87,5%			6,8%	-17,8%						-100,0%					-100,0%	17,6%	8,2%
February	-3,0%	14,3%				26,4%	-2,0%						136,4%		31,9%					2,4%
March	-38,9%	-55,2%	28,7%	-100,0%		-54,5%	-72,6%	-67,3%	-100,0%		-99,2%		-98,3%		-59,2%					-43,6%
April	-100,0%	-99,9%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-99,9%	-100,0%	-100,0%
May	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%
June	-89,4%	-95,4%	-100,0%	-99,9%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-97,3%
July	-65,0%	-63,7%	-76,7%	-75,3%	-90,6%	-66,9%	-77,6%	-73,5%	-72,5%	-83,7%	-78,6%	-73,5%	-73,4%	-71,6%	-69,5%	-82,0%	-84,5%	-77,6%	-90,6%	-71,1%
August	-61,9%	-58,4%	-59,4%	-56,1%	-83,1%	-51,4%	-62,0%	-48,4%	-50,4%	-52,2%	-53,3%	-46,8%	-45,8%	-77,7%	-58,2%	-73,4%	-67,7%	-65,6%	-73,7%	-56,7%
September	-68,8%	-65,6%	-61,3%	-56,3%	-90,9%	-60,7%	-73,2%	-54,7%	-75,8%	-60,6%	-59,7%	-54,9%	-58,1%	-80,0%	-65,2%	-84,8%	-63,1%	-76,1%	-97,5%	-64,4%
October	-64,0%	-65,8%	-35,7%	-30,7%	-100,0%	-52,7%	-77,2%	-41,3%	-78,7%	-53,5%	-44,5%	-69,3%	-55,0%	-65,4%	-54,1%	-91,4%	-42,9%	-76,4%	-100,0%	-56,5%
November	-84,9%	-95,4%	339,7%	1443,5%		-71,8%	-95,2%	-36,8%			-100,0%		-36,3%		-79,6%					-86,3%
December	-75,6%	-90,2%	1600,0%	-100,0%		-89,9%	-100,0%	-100,0%												-80,5%
Total	**-68,5%**	**-69,7%**	**-75,0%**	**-72,6%**	**-91,6%**	**-72,7%**	**-82,3%**	**-72,2%**	**-77,0%**	**-77,1%**	**-75,2%**	**-72,0%**	**-73,0%**	**-83,2%**	**-75,1%**	**-86,4%**	**-81,6%**	**-81,9%**	**-90,7%**	**-72,5%**

Source: Civil Aviation Authority (CAA) and Athens International Airport (AIA) - Processing: INSETE Intelligence

See Appendix

In the period January-December 2020, 5.9 million international airport arrivals were recorded, showing a decrease of -72.5%/-15.6 million arrivals compared to the period January-December 2019 when 21.5 million international airport arrivals were recorded *(Table 1).*

More specifically, in the period January-February 2020, 775 thousand international airport arrivals were recorded, showing an increase of +5.5%/+40 thousand arrivals compared to the period January-February 2019 when 734 thousand international airport arrivals were recorded. In March, on the other hand, a decrease of -43.7%/-217 thousand was recorded and only 279 thousand international airport arrivals were recorded. In April and May, all airports remained closed due to the general ban (lockdown) imposed in Greece because of the COVID-19 pandemic. In June, the decrease came to -97.3%/-3.1 million while in July it came to -71.1%/-2.8 million. In August, 1.7 million international airport arrivals were recorded, showing a decrease of -56.7%/-2.2 million. In September 2020, 1.1 million international airport arrivals were recorded, showing a decrease of -64.4%/-2 million, while in October 2020, 732 thousand arrivals were recorded, compared to 1.7 million arrivals in October 2019. Finally, 73 thousand arrivals were recorded in November, showing a decrease of -86.3%/-458 thousand, while 88 thousand arrivals were recorded in December, showing a decrease of -80.5%/-364 thousand.

In the period January-December 2020, five airports recorded a decrease of more than 1 million international airport arrivals. More specifically, 2 million international airport arrivals were recorded at the Athens International Airport, showing a decrease of -68.5%/-4.4 million. This was followed by Heraklion Airport, where 902 thousand international airport arrivals were recorded, showing a decrease of -72.7%/-2.4 million. At Rhodes Airport, 586 thousand international airport arrivals were recorded, showing a decrease of -75.0%/-1.8 million, while at Thessaloniki Airport, 709 thousand international airport arrivals were recorded, showing a decrease of -75.0%/-1.8 million. Finally, a decrease of -72.2%/-1.1 million was recorded at Corfu Airport, while international airport arrivals came to 404 thousand.

At all other airports there was a decrease of less than 1 million international airport arrivals. At Chania Airport a decrease of -82.3%/-940 thousand was recorded while only 202 thousand international airport arrivals were recorded. At the airports of Kos and Zakynthos, 322 thousand and 197 thousand passengers were recorded, showing a decrease of -72.6%/-856 thousand and -77.0%/-660 thousand respectively. A significant decrease was recorded at the airports of Santorini and Mykonos. More specifically, 140 thousand arrivals were recorded at Santorini Airport, showing a decrease of -73.0%/-380 thousand, while 133 thousand arrivals were recorded at Mykonos Airport, showing a decrease of -72.0%/-341 thousand. A decrease of -77.1%/-255 thousand was recorded in Kefalonia and -75,2%/-226 thousand in Aktio, while international airport arrivals came to 76 thousand and 75 thousand respectively.

A decrease of -81.6%/-148 thousand was observed at Skiathos Airport, with the recorded international airport arrivals at merely 34 thousand. At Kalamata Airport 38 thousand arrivals were recorded and at Samos Airport 19 thousand arrivals were recorded, showing a decrease of -75.1%/-115 thousand and -86.4%/-119 thousand respectively. The decrease at Kavala Airport came to -81.9%/-101 thousand and only 14 thousand passengers were recorded. At Araxos Airport a decrease of -83.2%/-70 thousand was observed while 14 thousand international airport arrivals were recorded. Finally, the fewest international airport arrivals for 2020 (5 thousand) were recorded at Lesvos Airport, together with the largest percentage decrease (-90.7%/-53 thousand arrivals).

Table 2: International air arrivals per geographical unit

Geographical unit	Regional airports			Dodecanes			Crete			Ionian Islands			Cyclades			Peloponnese		
	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019
January	119.990	104.483	14,8%	6	48	-87,5%	3.061	3.203	-4,4%	8			5	36	-86,1%	2		
February	122.911	106.810	15,1%				9.792	8.085	21,1%	25			293	118	148,3%	327	248	31,9%
March	61.577	139.435	-55,8%	121	262	-53,8%	5.207	12.245	-57,5%	168	906	-81,5%	13	695	-98,1%	752	1.833	-59,0%
April	183	721.163	-100,0%	13	135.135	-100,0%	5	256.745	-100,0%	3	85.278	-100,0%		45.116	-100,0%		5.858	-100,0%
May	17	1.768.877	-100,0%		447.629	-100,0%		554.710	-100,0%		355.252	-100,0%		103.708	-100,0%		24.868	-100,0%
June	12.956	2.526.576	-99,5%	170	638.079	-100,0%	2	746.271	-100,0%	32	546.635	-100,0%	20	173.729	-100,0%		46.835	-100,0%
July	820.413	3.017.127	-72,8%	174.766	750.241	-76,7%	264.439	870.762	-69,6%	168.975	673.621	-74,9%	62.346	234.731	-73,4%	14.738	49.746	-70,4%
August	1.329.078	2.959.511	-55,1%	307.247	752.321	-59,2%	394.194	856.378	-54,0%	326.968	653.313	-50,0%	121.771	226.835	-46,3%	17.666	50.705	-65,2%
September	861.893	2.329.699	-63,0%	235.727	597.813	-60,6%	259.072	717.169	-63,9%	185.230	490.152	-62,2%	64.103	147.768	-56,6%	12.713	42.794	-70,3%
October	529.088	1.117.899	-52,7%	195.803	298.694	-34,4%	163.264	394.626	-58,6%	69.863	139.192	-49,8%	24.157	60.920	-60,3%	5.883	13.869	-57,6%
November	13.760	140.213	-90,2%	2.705	442	512,0%	4.671	18.556	-74,8%	320	491	-34,8%	304	424	-28,3%	217	1.062	-79,6%
December	14.777	151.928	-90,3%	51	7	628,6%	350	4.907	-92,9%		145	-100,0%						
Total	**3.886.643**	**15.083.721**	**-74,2%**	**916.609**	**3.620.671**	**-74,7%**	**1.104.057**	**4.443.657**	**-75,2%**	**751.592**	**2.944.985**	**-74,5%**	**273.012**	**994.080**	**-72,5%**	**52.298**	**237.818**	**-78,0%**

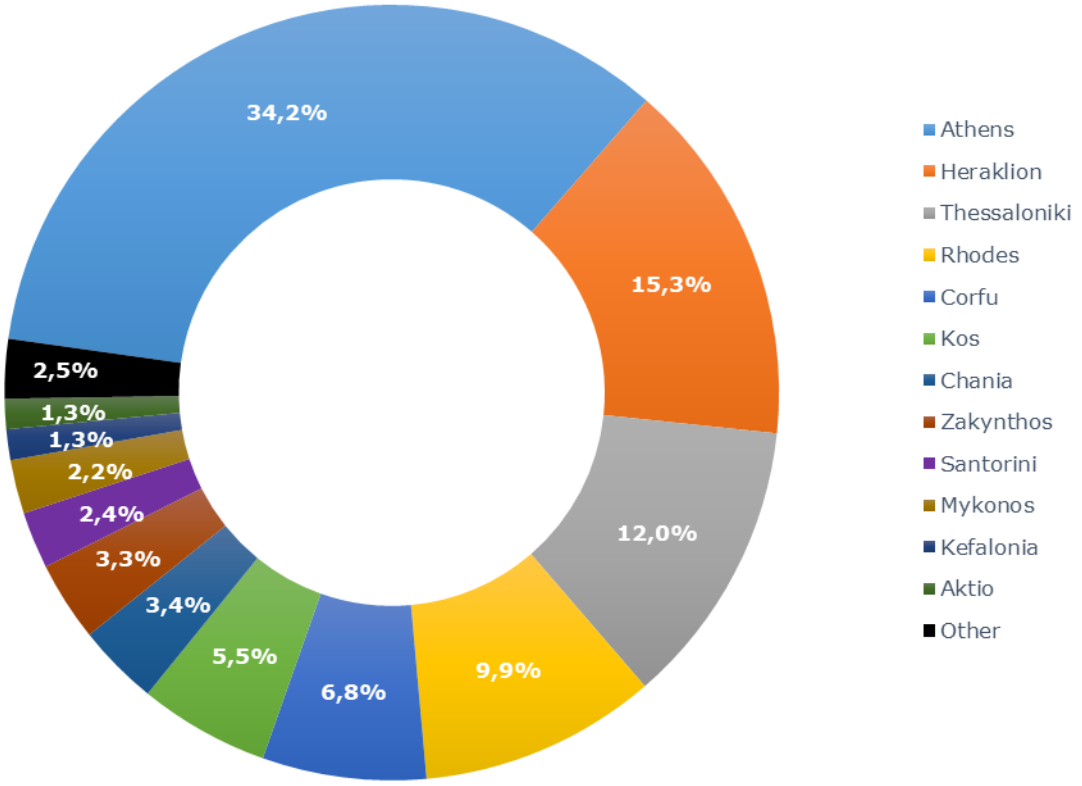
Source: Civil Aviation Authority (CAA) and Athens International Airport (AIA) - Processing: INSETE Intelligence

See Appendix

Hence, a decrease was recorded in each and every regional unit. In absolute terms, the largest decrease was found in Crete (-75.2%/-3.3 million), followed by the Dodecanese (-74.7%/-2.7 million) and the Ionian Islands (-74.5%/-2.9 million). In the regional unit of the Cyclades, a decrease of -72.5%/-721 thousand was recorded. Finally, a decrease of -78.0%/-186 thousand arrivals was recorded in the Peloponnese *(Table 2).*

The international airport arrivals of the top 5 airports make up 78.3% of the total *(Graph 2)*. More specifically, Athens welcomed 34.2% of inbound international airport arrivals in 2020. Heraklion was in second place with 15.3%, followed by Thessaloniki in third place (with 12.0%) and Rhodes in fourth place (with 9.9%). These were followed –with a lower percentage– by Corfu with 6.8%. Kos was in sixth place with 5.5%, followed by Chania in seventh place (with 3.4%) and Zakynthos in eighth place (with 3.3%), while Santorini and Mykonos complete the top 10 with 2.4% and 2.2% respectively. The arrivals of the top 10 airports account for 97.6% of the total international airport arrivals in 2020.

Graph 2: Market share per airport



Source: Civil Aviation Authority (CAA) and Athens International Airport (AIA) - Processing: INSETE Intelligence

2.2 International road arrivals

Table 3: Road Arrivals

2020	Nymfaia	Niki	Krystallopigi Agios Konstantinos	Ormenio	Kyprinos	Kastanies	Kipoi	Doirani	Evzonoi	Kakavia	Mertzani	Exochi	Promachonas	Sagiada	Total
January	50.551	23.195	77.376	4.303	16.473	4.784	16.051	42.925	9.991	115.834	79.164	2.207	13.842	151.528	17.474	625.698
February	48.219	19.062	49.124	2.951	17.160	4.691	14.539	32.012	33.977	109.647	44.825	1.468	11.526	127.099	12.545	528.845
March	25.116	18.241	25.057	1.716	9.382	2.170		15.231	5.033	27.935	21.191	803	6.574	78.290	6.002	242.741
April																
May																
June	36.876	791	22.364		15.359	2.448		5.879	4.855	15.113	14.127	590	10.681	214.692	6.157	349.932
July	34.084	21.147	883		7.900	689		77.454	2.739	15.447	26.171	868	3.374	282.029	10.808	483.593
August	1.796		24.156		4.315			5.551		14.699	22.390			54.451		127.358
September	2.390	140	11.489		4.903			6.370		16.180	11.329		1.508	42.970		97.279
October	2.384	141	8.642		4.031			7.524		15.793	10.244		2.000	20.482		71.241
November	1.213	117	3.633		3.851			7.282		16.003	8.964		1.836	8.414		51.313
December	956	109			6.250			6.973		17.705	7.503		1.601	11.235		52.332
Total	**203.585**	**82.943**	**222.724**	**8.970**	**89.624**	**14.782**	**30.590**	**207.201**	**56.595**	**364.356**	**245.908**	**5.936**	**52.942**	**991.190**	**52.986**	**2.630.332**

2019	Nymfaia	Niki	Krystallopigi Agios Konstantinos	Ormenio	Kyprinos	Kastanies	Kipoi	Doirani	Evzonoi	Kakavia	Mertzani	Exochi	Promachonas	Sagiada	Total
January	70.562	17.373	67.842	2.787	14.374	4.574	10.346	33.449	6.805	53.924	73.297	1.064	9.737	78.535	16.916	461.585
February	71.819	18.378	44.352	2.796	14.036	4.433	10.720	27.494	30.363	111.084	36.927	1.196	10.958	55.360	11.365	451.281
March	100.489	22.663	3.512	5.142	19.274	6.644	15.927	45.330	11.206	83.305	50.379	1.842	13.277	62.330	13.679	454.999
April	111.269	23.431	68.334	5.231	18.574	7.634	16.522	57.377	12.112	115.112	58.604	2.084	15.328	134.376	16.731	662.719
May	104.695	23.431	85.198	6.212	20.023	7.889	15.149	47.839	13.111	155.012	52.036	2.476	14.904	112.979	19.413	680.367
June	215.209	43.951	71.853	12.538	30.958	10.110	19.116	77.454	34.197	406.021	56.767	2.318	24.069	307.120	22.276	1.333.957
July	284.090	56.929	85.687	13.048	44.808	9.026	23.597	91.070	155.723	499.279	78.783	2.855	31.270	690.219	39.198	2.105.582
August	321.813	71.172	113.571	16.056	31.488	8.270	65.926	206.729	70.062	479.282	121.170	4.950	28.312	896.351	52.919	2.488.071
September	170.790	41.981	92.418	10.818	24.669	6.754	26.586	91.803	27.132	290.372	70.897	2.968	29.897	700.328	28.266	1.615.679
October	69.148	34.246	77.831	4.358	17.922	5.608	17.097	58.845	27.933	98.336	63.683	2.592	21.205	369.742	17.163	885.709
November	57.777	20.130	76.434	3.769	17.862	5.195	17.176	46.269	10.243	66.616	60.580	2.252	14.162	197.893	18.117	614.475
December	65.589	28.815	60.948	4.112	18.589	5.670	18.526	46.123	10.884	79.506	59.018	1.219	18.582	151.456	19.415	588.452
Total	**1.643.250**	**402.500**	**847.980**	**86.867**	**272.577**	**81.807**	**256.688**	**829.782**	**409.771**	**2.437.849**	**782.141**	**27.816**	**231.701**	**3.756.689**	**275.458**	**12.342.876**

% Changes	Nymfaia	Niki	Krystallopigi Agios Konstantinos	Ormenio	Kyprinos	Kastanies	Kipoi	Doirani	Evzonoi	Kakavia	Mertzani	Exochi	Promachonas	Sagiada	Total
January	-28,4%	33,5%	14,1%	54,4%	14,6%	4,6%	55,1%	28,3%	46,8%	114,8%	8,0%	107,4%	42,2%	92,9%	3,3%	35,6%
February	-32,9%	3,7%	10,8%	5,5%	22,3%	5,8%	35,6%	16,4%	11,9%	-1,3%	21,4%	22,7%	5,2%	129,6%	10,4%	17,2%
March	-75,0%	-19,5%	613,5%	-66,6%	-51,3%	-67,3%	-100,0%	-66,4%	-55,1%	-66,5%	-57,9%	-56,4%	-50,5%	25,6%	-56,1%	-46,7%
April	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%
May	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%	-100,0%
June	-82,9%	-98,2%	-68,9%	-100,0%	-50,4%	-75,8%	-100,0%	-92,4%	-85,8%	-96,3%	-75,1%	-74,5%	-55,6%	-30,1%	-72,4%	-73,8%
July	-88,0%	-62,9%	-99,0%	-100,0%	-82,4%	-92,4%	-100,0%	-15,0%	-98,2%	-96,9%	-66,8%	-69,6%	-89,2%	-59,1%	-72,4%	-77,0%
August	-99,4%	-100,0%	-78,7%	-100,0%	-86,3%	-100,0%	-100,0%	-97,3%	-100,0%	-96,9%	-81,5%	-100,0%	-100,0%	-93,9%	-100,0%	-94,9%
September	-98,6%	-99,7%	-87,6%	-100,0%	-80,1%	-100,0%	-100,0%	-93,1%	-100,0%	-94,4%	-84,0%	-100,0%	-95,0%	-93,9%	-100,0%	-94,0%
October	-96,6%	-99,6%	-88,9%	-100,0%	-77,5%	-100,0%	-100,0%	-87,2%	-100,0%	-83,9%	-83,9%	-100,0%	-90,6%	-94,5%	-100,0%	-92,0%
November	-97,9%	-99,4%	-95,2%	-100,0%	-78,4%	-100,0%	-100,0%	-84,3%	-100,0%	-76,0%	-85,2%	-100,0%	-87,0%	-95,7%	-100,0%	-91,6%
December	-98,5%	-99,6%	-100,0%	-100,0%	-66,4%	-100,0%	-100,0%	-84,9%	-100,0%	-77,7%	-87,3%	-100,0%	-91,4%	-92,6%	-100,0%	-91,1%
Total	**-87,6%**	**-79,4%**	**-73,7%**	**-89,7%**	**-67,1%**	**-81,9%**	**-88,1%**	**-75,0%**	**-86,2%**	**-85,1%**	**-68,6%**	**-78,7%**	**-77,2%**	**-73,6%**	**-80,8%**	**-78,7%**

Source: Border checkpoints - Processing: INSETE Intelligence

See Appendix

In the period January-December 2020, 2.6 million international road arrivals were recorded, showing a decrease of -78.7%/-9.7 million arrivals compared to the period January-December 2019 when 12.3 million international road arrivals were recorded *(Table 3).* More specifically, in the period January-February 2020, 1.2 million international road arrivals were recorded, showing an increase of +26.5%/+242 thousand arrivals compared to the period January-February 2019 when 913 thousand international road arrivals were recorded. In March, on the other hand, a decrease of -46.7%/-212 thousand was observed and 243 thousand road arrivals were recorded. In April and May, all border checkpoints remained closed due to the general ban (lockdown) imposed in Greece because of the COVID-19 pandemic. Some border checkpoints remained closed for a longer period of time. More specifically, the Agios Konstantinos border checkpoint remained closed for the April-December 2020 period while the Kastanies border checkpoint remained closed for the March-December 2020 period. The border checkpoints of Doirani, Mertzani, Kyprinos and Sagiada remained closed for the August-December 2020 period.

In June, 350 thousand road arrivals were recorded, showing a decrease of -73.8%/-984 thousand, while in July the decrease came to -77.0%/-1.6 million, with 484 thousand road arrivals. In August, the decrease came to -94.9%/-2.4 million, since only 127 thousand road arrivals were recorded, compared to 2.5 million arrivals in August 2019. In September, 97 thousand road arrivals were recorded, showing a decrease of -94.0%/-1.5 million. In October, 71 thousand road arrivals were recorded (with a decrease of -92.0%/-814 thousand), while in November, road arrivals came to only 51 thousand, showing a decrease of -91.6%/-563 thousand. Finally, December showed a decrease of -91.1%/-536 thousand, with barely 52 thousand arrivals.

In the period January-December 2020 and in absolute terms, the largest decrease was recorded in Promachonas (-73.6%/-2.8 million), with road arrivals coming to 991 thousand. This was followed by the Evzoni border checkpoint with a decrease -85.1%/-2.0 million, where only 364 thousand road arrivals were recorded. The greatest percentage decrease (-89.7%/-78 thousand) was recorded at the Agios Konstantinos border checkpoint, where only 9 thousand road arrivals were recorded. This was followed by the Nymphaea border checkpoint, with -87.6%/-1.4 million road arrivals.

In the period January-December 2020 *(Table 4),* a decrease was recorded with regard to all neighbouring countries of origin. More specifically, arrivals from Bulgaria showed the largest decrease in absolute terms (-77.6%/-4.7 million), while arrivals from the Republic of North Macedonia showed the largest decrease in percentage terms (-84.5%/-2.7 million). Finally, arrivals from Albania showed a decrease of -72.7%/-1.4 thousand and those from Turkey showed a decrease of -78.1%/-849 thousand.

Table 4: Road arrivals per country

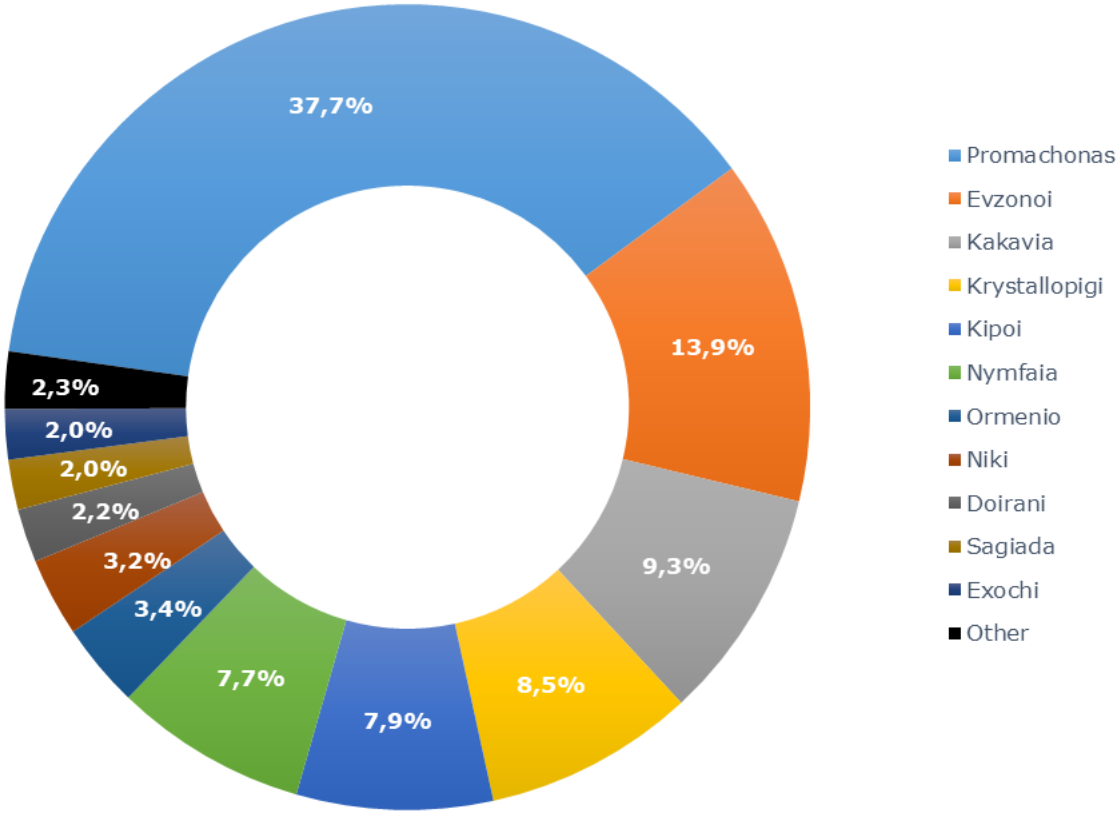
Countries	Albania			Bulgaria			North Macedonia			Turkey		
	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019
January	176.221	159.119	10,7%	241.481	180.569	33,7%	149.020	78.102	90,8%	58.976	43.795	34,7%
February	107.962	93.840	15,0%	211.646	159.402	32,8%	162.686	159.825	1,8%	46.551	38.214	21,8%
March	53.053	69.412	-23,6%	123.248	207.156	-40,5%	51.209	117.174	-56,3%	15.231	61.257	-75,1%
April		145.753	-100,0%		292.412	-100,0%		150.655	-100,0%		73.899	-100,0%
May		159.123	-100,0%		266.702	-100,0%		191.554	-100,0%		62.988	-100,0%
June	43.238	153.214	-71,8%	280.056	600.004	-53,3%	20.759	484.169	-95,7%	5.879	96.570	-93,9%
July	38.730	206.523	-81,2%	328.076	1.072.461	-69,4%	39.333	711.931	-94,5%	77.454	114.667	-32,5%
August	46.546	292.610	-84,1%	60.562	1.302.290	-95,3%	14.699	620.516	-97,6%	5.551	272.655	-98,0%
September	22.818	194.549	-88,3%	51.771	943.256	-94,5%	16.320	359.485	-95,5%	6.370	118.389	-94,6%
October	18.886	161.269	-88,3%	28.897	487.983	-94,1%	15.934	160.515	-90,1%	7.524	75.942	-90,1%
November	12.597	157.383	-92,0%	15.314	296.658	-94,8%	16.120	96.989	-83,4%	7.282	63.445	-88,5%
December	7.503	140.600	-94,7%	20.042	263.998	-92,4%	17.814	119.205	-85,1%	6.973	64.649	-89,2%
Total	**527.554**	**1.933.395**	**-72,7%**	**1.361.093**	**6.072.891**	**-77,6%**	**503.894**	**3.250.120**	**-84,5%**	**237.791**	**1.086.470**	**-78,1%**

Source: Border checkpoints - Processing: INSETE Intelligence

See Appendix

The international road arrivals of the top 5 border checkpoints make up 77.2% of the total *(Graph 3)*. More specifically, Promachonas welcomed 37.7% of inbound road arrivals in 2020. The Evzoni border checkpoint was in second place with 13.9%, the Kakavia border checkpoint was in third place with 9.3% and the Krystallopigi border checkpoint was in fourth place with 8.5%. These were followed –with a lower percentage– by the Kipoi border checkpoint with 7.9%. In sixth place was Nymphaea with 7.7%, in seventh place was Ormenio with 3.4%, in eighth place was Niki with 3.2% and Doirani was in ninth place with 2.2%. The border checkpoints of Exochi and Sagiada were at tenth place with 2.0% each. The arrivals of the top 10 border checkpoints account for 95.7% of the total international road arrivals in 2020.

Graph 3: Market share per checkpoint



Source: Border checkpoints - Processing: INSETE Intelligence

2.3 Arrivals by sea

2.3.1 The Adriatic[1]

It is estimated that, in the Adriatic market, visitor flows have decreased by -70% in 2020, while the estimate for the number of visitors comes to 450 thousand compared to 1.5 million in 2019 *(Table 5)*. SEEN estimates that 70% of visitors in 2019 were tourists. More specifically, 72 thousand visitors were recorded in the first quarter, showing a -47% decrease, while in the second quarter –that is, during Greece's first lockdown– the decrease in visitors reached -99%, since only 3 thousand visitors were recorded. In the third quarter –the high season–, 308 thousand visitors were recorded compared to 841 thousand in 2019, showing a decrease of -63%. The visitors of the third quarter account for 68% of total arrivals in 2020. Furthermore, a -67% decrease was recorded in the fourth quarter and the number of visitors was estimated to be 68 thousand compared to 202 thousand in 2019. Finally, in 2020, car flow decreased by -56% and truck flow by -9%. More specifically, the estimate for the number of cars in 2020 is 140 thousand and for the number of trucks it is 340 thousand, compared to 317 thousand and 374 thousand respectively in 2019.

Table 5: International sea arrivals from the Adriatic

Quarter	2020			2019			% Changes		
	Passengers	Vehicles	Trucks	Passengers	Vehicles	Trucks	Passengers	Vehicles	Trucks
1	72.000	23.000	96.000	135.852	30.634	92.874	-47%	-25%	3%
2	3.000	3.500	75.000	323.384	64.129	93.774	-99%	-95%	-20%
3	307.500	88.000	83.000	840.728	173.995	90.844	-63%	-49%	-9%
4	67.500	25.000	86.000	202.260	48.401	96.336	-67%	-48%	-11%
Total	**450.000**	**139.500**	**340.000**	**1.502.224**	**317.159**	**373.828**	**-70%**	**-56%**	**-9%**

Source: SEEN – Processing: INSETE Intelligence

See Appendix

[1] The data concerning 2020 are estimates and shall be updated in the course of the year

2.3.2 Cruise travel

The measures taken globally to deal with the COVID-19 pandemic have had –and, unfortunately, continue to have– social and economic repercussions on all fields of activities. As expected, these measures also affected the cruise industry worldwide, a sector in which Greece had performed well over the past years and had a promising future. Cruise travel statistics for 2020 regarding 43 recorded destinations in Greece show a significant decrease which comes to 204 cruise ship arrivals (compared to 3,899 arrivals in 2019) and 66,874 visitor arrivals (compared to 5,537,500 arrivals in 2019). Specifically, the decrease in visitor arrivals and cruise ship arrivals came to -99% and -95% respectively.

Table 6: Top-10 cruise port based on passengers

	2020		2019		% Changes	
Ports/Arrivals	Passengers	Cruise ships	Passengers	Cruise ships	Passengers	Cruise ships
Heraklion	19.998	24	307.043	204	-93%	-88%
Piraeus	16.640	76	1.098.091	622	-98%	-88%
Corfu	10.448	13	767.673	420	-99%	-97%
Rhodes	8.334	14	308.194	258	-97%	-95%
Κατάκολο	7.589	10	413.716	199	-98%	-95%
Mykonos	914	17	787.490	550	-100%	-97%
Kefalonia-Ithaca	617	1	259.261	133	-100%	-99%
Patmos	468	6	112.721	156	-100%	-96%
Syros	323	8	26.748	82	-99%	-90%
Other	1.543	35	1.456.563	1.275	-100%	-97%
Total	**66.874**	**204**	**5.537.500**	**3.899**	**-99%**	**-95%**

Source:ELIME – Processing: INSETE Intelligence

See Appendix

According to *Table 6,* in 2020, the port of Piraeus welcomed 76 cruise ships carrying 16,640 passengers, compared to 622 cruise ships and 1,098,091 passengers for 2019, thus falling –for the first time– in second place after the port of Heraklion. The port of Heraklion welcomed 24 cruise ships carrying 19,998 passengers in 2020, compared to 204 cruise ships and 307,043 passengers in 2019, thus gaining the first place. In all the other ports, the total number of cruise ship passengers came to fewer than 10,000, while in many cases the percentage decrease was 100%.

Indicatively:

- Corfu: 10,448 passenger arrivals and 13 cruise ship arrivals, compared to 767 thousand passengers and 420 cruise ships in 2019
- Rhodes: 8,334 passenger arrivals and 14 cruise ship arrivals, compared to 308 thousand passengers and 258 cruise ships in 2019
- Katakolo: 7,589 passenger arrivals and 10 cruise ship arrivals, compared to 413 thousand passengers and 199 cruise ships in 2019
- Mykonos: 914 passenger arrivals and 17 cruise ship arrivals, compared to 787 thousand passengers and 550 cruise ships in 2019

Finally, only 3 cruise ships carrying 131 passengers arrived at the port of Santorini in 2020, compared to 592 cruise ships and 980,771 passengers in 2019 and, as a result, the island lost –for the first time– its position in the top 10 Greek ports.

3 Domestic Flows

3.1 Domestic air arrivals at main airports

Table 7: Domestic air arrivals at main Greek airports

2020	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	220.541	74.085	27.182	9.113	1.588	46.972	23.637	10.085	1.337	1.470	22	3.552	14.494	2.093	588	6.233	556	2.247	12.481	458.276
February	213.756	72.695	24.399	8.292	1.436	46.188	22.571	10.479	1.288	1.580	128	3.745	13.649	2.234	647	5.663	545	2.255	12.101	443.651
March	103.917	32.323	14.827	5.764	1.000	23.380	10.529	5.421	758	883	84	2.033	8.321	1.230	425	3.801	403	1.028	7.307	223.434
April		1.323	785	334	108	1.199	383	320	63	97	38	80	202	91	10	305	31	114	649	6.132
May		7.511	3.729	1.035	361	6.681	2.945	1.326	249	335	56	788	1.734	600	2	1.270	105	363	2.200	31.290
June	94.574	22.819	12.982	5.399	1.484	20.740	9.232	4.736	981	1.000	137	4.806	7.264	2.820	474	4.073	556	962	7.402	202.441
July	183.009	54.150	23.831	9.688	3.180	37.946	17.130	9.579	2.231	2.826	292	16.956	25.248	11.576	769	6.868	2.191	1.272	14.671	423.413
August	256.095	59.047	24.317	9.982	3.729	39.023	20.373	10.326	2.981	3.795	848	17.728	31.339	13.075	1.059	7.453	2.791	1.267	13.638	518.866
September	183.678	44.876	17.253	6.660	1.956	27.964	15.383	6.766	2.100	1.766	129	8.848	20.484	6.851	457	4.915	1.437	1.157	8.479	361.159
October	142.222	36.355	14.861	5.685	1.275	25.316	14.751	5.481	903	1.209	74	3.696	12.271	4.359	532	3.985	452	795	7.221	281.443
November	56.045	6.377	6.340	2.337	641	9.267	3.966	2.133	292	399	42	903	1.840	950	51	2.151	175	720	3.372	98.001
December	48.247	13.658	5.579	1.957	449	9.349	4.144	2.394	405	441	60	602	1.225	835	166	1.931	188	425	3.174	95.229
Total	**1.502.084**	**425.219**	**176.085**	**66.246**	**17.207**	**294.025**	**145.044**	**69.046**	**13.588**	**15.801**	**1.910**	**63.737**	**138.071**	**46.714**	**5.180**	**48.648**	**9.430**	**12.605**	**92.695**	**3.143.335**

2019	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	228.675	83.762	26.525	9.131	1.249	46.819	23.632	10.143	1.210	1.400	31	3.279	17.305	2.310	549	5.652	427	2.698	11.541	476.338
February	224.973	83.488	23.424	8.299	1.171	45.702	21.994	9.898	1.440	1.416	27	3.274	18.370	2.015	436	4.949	458	2.297	10.712	464.343
March	259.746	93.893	27.933	9.669	1.724	52.949	25.260	11.652	1.591	1.661	82	5.431	28.175	2.634	618	5.876	652	2.863	13.406	545.815
April	276.237	81.379	34.169	11.263	2.252	55.090	26.137	13.335	2.823	1.961	102	14.936	52.195	5.193	1.033	6.892	1.234	2.822	14.155	603.208
May	353.056	84.850	35.767	11.672	2.855	54.770	27.607	13.507	3.686	3.002	187	27.944	69.432	8.220	876	7.594	1.768	2.944	14.682	724.419
June	399.476	90.384	37.685	12.732	3.361	55.432	30.853	17.394	6.284	6.103	563	41.918	77.276	16.174	1.336	8.141	4.464	2.789	15.880	828.245
July	456.239	102.506	45.958	17.223	4.948	62.524	35.678	20.212	8.203	10.225	1.394	49.657	74.834	21.525	1.635	10.701	6.132	3.379	20.986	953.959
August	478.408	99.639	46.214	17.669	5.294	63.270	35.461	20.112	8.485	10.001	1.720	47.456	73.757	21.984	1.792	10.651	6.198	2.919	19.342	970.372
September	429.909	97.021	38.144	12.651	3.032	59.790	29.495	16.140	5.904	5.401	763	37.675	76.606	13.759	1.275	7.649	3.309	2.779	15.732	857.034
October	361.969	87.419	31.171	9.723	1.901	55.209	25.946	12.646	3.095	2.432	165	15.859	60.014	5.480	1.088	6.311	839	2.920	13.757	697.944
November	262.558	83.212	26.335	8.762	1.501	49.052	24.113	10.683	1.493	1.699	27	4.081	23.732	2.417	630	6.049	634	2.812	13.446	523.236
December	242.410	83.304	26.831	8.568	1.178	48.389	24.903	10.831	1.582	1.558	106	3.157	14.413	1.821	745	5.239	468	2.713	13.382	491.598
Total	**3.973.656**	**1.070.857**	**400.156**	**137.362**	**30.466**	**648.996**	**331.079**	**166.553**	**45.796**	**46.859**	**5.167**	**254.667**	**586.109**	**103.532**	**12.013**	**85.704**	**26.583**	**33.935**	**177.021**	**8.136.511**

% Changes	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	-3,6%	-11,6%	2,5%	-0,2%	27,1%	0,3%	0,0%	-0,6%	10,5%	5,0%	-29,0%	8,3%	-16,2%	-9,4%	7,1%	10,3%	30,2%	-16,7%	8,1%	-3,8%
February	-5,0%	-12,9%	4,2%	-0,1%	22,6%	1,1%	2,6%	5,9%	-10,6%	11,6%	374,1%	14,4%	-25,7%	10,9%	48,4%	14,4%	19,0%	-1,8%	13,0%	-4,5%
March	-60,0%	-65,6%	-46,9%	-40,4%	-42,0%	-55,8%	-58,3%	-53,5%	-52,4%	-46,8%	2,4%	-62,6%	-70,5%	-53,3%	-31,2%	-35,3%	-38,2%	-64,1%	-45,5%	-59,1%
April	-100,0%	-98,4%	-97,7%	-97,0%	-95,2%	-97,8%	-98,5%	-97,6%	-97,8%	-95,1%	-62,7%	-99,5%	-99,6%	-98,2%	-99,0%	-95,6%	-97,5%	-96,0%	-95,4%	-99,0%
May	-100,0%	-91,1%	-89,6%	-91,1%	-87,4%	-87,8%	-89,3%	-90,2%	-93,2%	-88,8%	-70,1%	-97,2%	-97,5%	-92,7%	-99,8%	-83,3%	-94,1%	-87,7%	-85,0%	-95,7%
June	-76,3%	-74,8%	-65,6%	-57,6%	-55,8%	-62,6%	-70,1%	-72,8%	-84,4%	-83,6%	-75,7%	-88,5%	-90,6%	-82,6%	-64,5%	-50,0%	-87,5%	-65,5%	-53,4%	-75,6%
July	-59,9%	-47,2%	-48,1%	-43,7%	-35,7%	-39,3%	-52,0%	-52,6%	-72,8%	-72,4%	-79,1%	-65,9%	-66,3%	-46,2%	-53,0%	-35,8%	-64,3%	-62,4%	-30,1%	-55,6%
August	-46,5%	-40,7%	-47,4%	-43,5%	-29,6%	-38,3%	-42,5%	-48,7%	-64,9%	-62,1%	-50,7%	-62,6%	-57,5%	-40,5%	-40,9%	-30,0%	-55,0%	-56,6%	-29,5%	-46,5%
September	-57,3%	-53,7%	-54,8%	-47,4%	-35,5%	-53,2%	-47,8%	-58,1%	-64,4%	-67,3%	-83,1%	-76,5%	-73,3%	-50,2%	-64,2%	-35,7%	-56,6%	-58,4%	-46,1%	-57,9%
October	-60,7%	-58,4%	-52,3%	-41,5%	-32,9%	-54,1%	-43,1%	-56,7%	-70,8%	-50,3%	-55,2%	-76,7%	-79,6%	-20,5%	-51,1%	-36,9%	-46,1%	-72,8%	-47,5%	-59,7%
November	-78,7%	-92,3%	-75,9%	-73,3%	-57,3%	-81,1%	-83,6%	-80,0%	-80,4%	-76,5%	55,6%	-77,9%	-92,2%	-60,7%	-91,9%	-64,4%	-72,4%	-74,4%	-74,9%	-81,3%
December	-80,1%	-83,6%	-79,2%	-77,2%	-61,9%	-80,7%	-83,4%	-77,9%	-74,4%	-71,7%	-43,4%	-80,9%	-91,5%	-54,1%	-77,7%	-63,1%	-59,8%	-84,3%	-76,3%	-80,6%
Total	**-62,2%**	**-60,3%**	**-56,0%**	**-51,8%**	**-43,5%**	**-54,7%**	**-56,2%**	**-58,5%**	**-70,3%**	**-66,3%**	**-63,0%**	**-75,0%**	**-76,4%**	**-54,9%**	**-56,9%**	**-43,2%**	**-64,5%**	**-62,9%**	**-47,6%**	**-61,4%**

Source: Civil Aviation Authority (CAA) and Athens International Airport (AIA) - Processing: INSETE Intelligence

In the period January-December 2020 *(Table 7)*, 3.1 million domestic arrivals were recorded compared to 8.1 million in the period January-December 2019, showing a decrease of -61.4%/-5 million arrivals.

More specifically, in the period January-February 2020, 901 thousand domestic airport arrivals were recorded compared to 941 thousand in the period January-February 2019, showing a decrease of -4.2%/-40 thousand arrivals.

In March, 223 thousand airport arrivals were recorded, showing a decrease of -59.1%/-323 thousand. In April and May, passenger flows at airports were limited due to the lockdown imposed ın Greece because of the COVID-19 pandemic. More specifically, only 6 thousand arrivals were recorded in April and the decrease came to -99.0%/-597 thousand, while 31 thousand arrivals were recorded in May, showing a decrease of -95.7%/-693 thousand passengers. In June, a decrease of -75.6%/-623 thousand was observed while in July the decrease was reduced to -55.6%/-531 thousand airport arrivals. In August, 519 thousand airport arrivals were recorded, showing a decrease of -46.5%/-451 thousand, while in September 361 thousand airport arrivals were recorded, showing a decrease of -57.9%/-496 thousand. In October, 281 thousand arrivals were recorded, showing a decrease of -59.7%/-980 thousand. Finally, in November and December, 98 thousand and 95 thousand arrivals were recorded, showing a decrease of -81.3%/-425 thousand and -80.6%/-396 thousand, respectively.

Athens International Airport welcomed 1.5 million arrivals, recording a decrease of -62.2%/-2.5 million, while at Thessaloniki Airport only 425 thousand arrivals were recorded, showing a decrease of -60.3%/-645 thousand. As far as regional units are concerned *(Table 7)*, the largest decrease was recorded in the Cyclades (-73.7%/-696 thousand) and resulted mainly from Santorini, where a decrease of -448 thousand passengers was recorded (-76.4%). A smaller decrease in absolute terms was recorded in Mykonos (-75.0%/-190 thousand) and Paros (-54.9%/-57 thousand). Airport arrivals in the Cyclades in the period January-December 2020 came to 249 thousand compared to 944 thousand in the period January-December 2019.

In Crete, 439 thousand airport arrivals were recorded, showing a decrease of -55.2%/-541 thousand passengers. More specifically, a decrease of -54.7%/-355 thousand and -56.2%/-186 thousand was recorded at Heraklion Airport and Chania airport, respectively. A decrease of -54.3%/-308 thousand was observed in the Dodecanese, where 260 thousand airport arrivals were recorded in the period January-December 2020, compared to 568 thousand in the period January-December 2019. In Rhodes, 176 thousand passengers were recorded (-56.0%/-224

thousand), while 66 thousand passengers were recorded in Kos (-51.8%/-71 thousand) and 17 thousand passengers in Karpathos (-43.5%/-13 thousand).

A decrease of -62.0%/-164 thousand passengers was recorded in the Ionian Islands, where airport arrivals for the period January-December 2020 came to 100 thousand compared to 264 thousand for the period January-December 2019. In Corfu, 69 thousand passengers were recorded (-58.5%/-98 thousand), while 15 thousand passengers were recorded in Kefalonia (-66.3%/-31 thousand), 14 thousand passengers in Zakynthos (-70.3%/-32 thousand) and 2 thousand passengers in Aktio (-63.0%/-3 thousand) *(Table 8)*.

Table 8: Domestic air arrivals per geographical unit

Geographical unit	Regional airports			Dodecanes			Crete			Ionian Islands			Cyclades		
	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019	2020	2019	Δ2020/2019
January	237.735	247.663	-4,0%	37.883	36.905	2,7%	70.609	70.451	0,2%	12.914	12.784	1,0%	20.139	22.894	-12,0%
February	229.895	239.370	-4,0%	34.127	32.894	3,7%	68.759	67.696	1,6%	13.475	12.781	5,4%	19.628	23.659	-17,0%
March	119.517	286.069	-58,2%	21.591	39.326	-45,1%	33.909	78.209	-56,6%	7.146	14.986	-52,3%	11.584	36.240	-68,0%
April	6.132	326.971	-98,1%	1.227	47.684	-97,4%	1.582	81.227	-98,1%	518	18.221	-97,2%	373	72.324	-99,5%
May	31.290	371.363	-91,6%	5.125	50.294	-89,8%	9.626	82.377	-88,3%	1.966	20.382	-90,4%	3.122	105.596	-97,0%
June	107.867	428.769	-74,8%	19.865	53.778	-63,1%	29.972	86.285	-65,3%	6.854	30.344	-77,4%	14.890	135.368	-89,0%
July	240.404	497.720	-51,7%	36.699	68.129	-46,1%	55.076	98.202	-43,9%	14.928	40.034	-62,7%	53.780	146.016	-63,2%
August	262.771	491.964	-46,6%	38.028	69.177	-45,0%	59.396	98.731	-39,8%	17.950	40.318	-55,5%	62.142	143.197	-56,6%
September	177.481	427.125	-58,4%	25.869	53.827	-51,9%	43.347	89.285	-51,5%	10.761	28.208	-61,9%	36.183	128.040	-71,7%
October	139.221	335.975	-58,6%	21.821	42.795	-49,0%	40.067	81.155	-50,6%	7.667	18.338	-58,2%	20.326	81.353	-75,0%
November	41.956	260.678	-83,9%	9.318	36.598	-74,5%	13.233	73.165	-81,9%	2.866	13.902	-79,4%	3.693	30.230	-87,8%
December	46.982	249.188	-81,1%	7.985	36.577	-78,2%	13.493	73.292	-81,6%	3.300	14.077	-76,6%	2.662	19.391	-86,3%
Total	**1.641.251**	**4.162.855**	**-60,6%**	**259.538**	**567.984**	**-54,3%**	**439.069**	**980.075**	**-55,2%**	**100.345**	**264.375**	**-62,0%**	**248.522**	**944.308**	**-73,7%**

Source: Civil Aviation Authority (CAA) and Athens International Airport (AIA) - Processing: INSETE Intelligence

See Appendix

3.2 Coastal Shipping

Domestic passenger flows are estimated to have decreased by -50% in 2020, while the estimate for the number of passengers comes to 9.4 million compared to 18.8 million in 2019 *(Table 9)*. More specifically, in the first quarter 1.9 million passengers were recorded, showing a decrease of -7%, and in the second quarter –that is, during Greece's first lockdown– the decrease in the number of passengers reached -77%, while only 1 million passengers were recorded. In the third quarter –the high season–, 5.1 million passengers were recorded compared to 8.8 million in 2019, showing a decrease of -42%. The passengers of the third quarter account for 55% of the total number of passengers in 2020. In the fourth quarter, a decrease of -61% was recorded and passengers were estimated at 1.2 million compared to 3.2 million in 2019. Finally, in 2020, car flow decreased by -40% and truck flow by -17%. More specifically, the estimate for the number of cars in 2020 is 1.7 million and for the number of trucks it is 507 thousand, compared to 2.9 million and 611 thousand respectively in 2019.

Table 9: Domestic coastal shipping traffic

Quarter	2020			2019			% Changes		
	Passengers	Vehicles	Trucks	Passengers	Vehicles	Trucks	Passengers	Vehicles	Trucks
1	1.948.000	295.000	127.000	2.084.179	328.024	129.442	-7%	-10%	-2%
2	1.088.000	236.500	115.000	4.741.265	641.414	173.212	-77%	-63%	-34%
3	5.137.000	965.500	138.000	8.797.881	1.443.307	170.065	-42%	-33%	-19%
4	1.237.000	262.000	127.000	3.196.644	519.506	138.395	-61%	-50%	-8%
Total	**9.410.000**	**1.759.000**	**507.000**	**18.819.969**	**2.932.251**	**611.114**	**-50%**	**-40%**	**-17%**

Source: SEEN – Processing: INSETE Intelligence

See Appendix

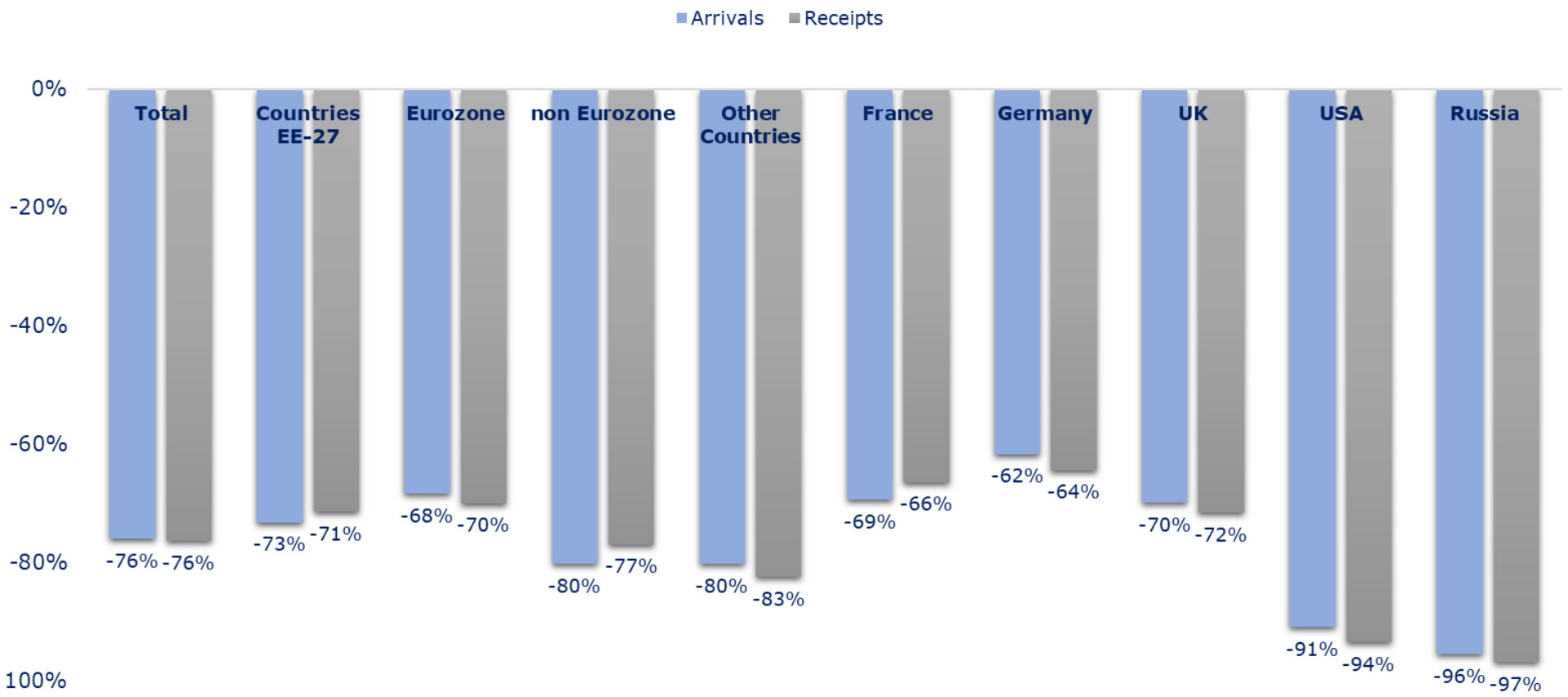
4 Balance of Travel Services

4.1 Arrivals - Receipts

In 2020, inbound visitor flows decreased by -76.5% with 7,375 thousand visitors compared to 31,348 thousand visitors in 2019. In the period under review, the number of visitors from within the EU27 came to 4,889 thousand, showing a decrease of -73.6% compared to 2019, while the number of visitors from outside the EU27 decreased by -80.6% and came to 2,485 thousand. The number of visitors from within the euro area decreased by -68.9%, while the number of visitors from EU27 countries outside the euro area decreased by -80.7%. More specifically, the visitor flow from Germany decreased by -62.1% with 1,526 thousand visitors, while the flow from France decreased by -69.6% with 469 thousand visitors. With regard to non-EU27 countries, the visitor flow from the United Kingdom decreased by -69.5% with 1,069 thousand visitors, while the flow from the United States decreased by -91.0% with 107 thousand visitors. Finally, the visitor flow from Russia decreased by -95.6% with the number of visitors coming to 26 thousand.

In 2020, travel receipts decreased by -76.5% compared to 2019 and amounted to €4,280 million. This development was due to a -70.8% decrease in receipts from residents of the EU27 (amounting to €2,840 million) and to a -82.0% decrease in receipts from residents of non-EU27 countries (amounting to €1,434 million). More specifically, receipts from euro area residents amounted to €2,390 million, showing a -69.1% decrease, while receipts from residents of EU27 countries outside the euro area fell by -77.5% and amounted to €451 million. More specifically, receipts from Germany decreased by -61.6% and amounted to €1,135 million, while receipts from France decreased by -66.3% and amounted to €367 million. With regard to non-EU27 countries, receipts from the United Kingdom fell by -70.8% to €749 million, while receipts from the United States fell by -93.0% to €83 million. Receipts from Russia decreased by -96.9% and amounted to €14 million.

Graph 4: Change of Arrivals - Receipts 2020



Source: Bank of Greece - Processing: INSETE Intelligence

Table 10: International Arrivals 2020

2020	Countries EE-27	Eurozone	of which		non Eurozone	Other	of which			Total
			France	Germany			U.K.	USA	Russia	
January	**300**	**232**	10	67	**68**	490	**72**	32	13	**790**
February	**288**	**163**	9	46	**125**	339	**29**	29	5	**627**
March	**242**	**85**	14	20	**157**	169	**16**	25	4	**411**
April	**21**	**2**	0	1	**18**	17	**0**	0	0	**38**
May	**26**	**4**	0	1	**22**	30	**0**	0	0	**56**
June	**183**	**25**	1	12	**158**	73	**0**	0	0	**256**
July	**661**	**416**	53	165	**246**	167	**62**	2	0	**828**
August	**1.349**	**1.087**	184	414	**262**	457	**349**	4	0	**1.807**
September	**946**	**767**	113	377	**179**	389	**300**	4	1	**1.335**
October	**662**	**568**	78	391	**94**	293	**200**	3	1	**955**
November	**90**	**64**	4	21	**25**	86	**34**	5	0	**176**
December	**50**	**34**	2	11	**16**	47	**7**	2	1	**97**
Total	**4.889**	**3.447**	**469**	**1.526**	**1.442**	**2.485**	**1.069**	**107**	**26**	**7.374**

2019	Countries EE-27	Eurozone	of which		non Eurozone	Other	of which			Total
			France	Germany			U.K.	USA	Russia	
January	**308**	**176**	11	68	**132**	352	**38**	25	10	**660**
February	**226**	**132**	14	40	**93**	278	**54**	19	8	**504**
March	**358**	**207**	30	70	**151**	415	**51**	60	11	**773**
April	**537**	**389**	66	107	**149**	445	**64**	51	12	**982**
May	**1.412**	**1.072**	167	477	**340**	975	**348**	132	26	**2.387**
June	**2.397**	**1.554**	240	591	**843**	1.705	**546**	135	85	**4.102**
July	**3.376**	**1.943**	285	589	**1.434**	2.297	**644**	173	106	**5.673**
August	**4.264**	**2.310**	338	718	**1.954**	2.498	**741**	192	129	**6.762**
September	**3.176**	**1.693**	233	653	**1.483**	1.935	**655**	195	81	**5.111**
October	**1.663**	**1.151**	129	595	**512**	1.110	**283**	124	82	**2.773**
November	**490**	**248**	16	72	**242**	439	**50**	43	19	**930**
December	**309**	**196**	13	47	**113**	384	**25**	29	12	**692**
Total	**18.554**	**11.071**	**1.542**	**4.026**	**7.482**	**12.795**	**3.499**	**1.179**	**583**	**31.348**

% Changes	Countries EE-28	Eurozone	of which		non Eurozone	Other	of which			Total
			France	Germany			U.K.	USA	Russia	
January	**-2,6%**	**31,9%**	-8,5%	-1,1%	**-48,7%**	39,2%	**89,7%**	29,2%	26,2%	**19,7%**
February	**27,5%**	**22,9%**	-36,3%	15,1%	**34,2%**	22,2%	**-46,4%**	53,5%	-42,5%	**24,6%**
March	**-32,5%**	**-58,9%**	-51,2%	-71,3%	**3,8%**	-59,2%	**-69,4%**	-59,3%	-64,5%	**-46,8%**
April	**-96,1%**	**-99,4%**	-100,0%	-99,2%	**-87,5%**	-96,3%	**-100,0%**	-100,0%	-100,0%	**-96,2%**
May	**-98,2%**	**-99,7%**	-100,0%	-99,7%	**-93,5%**	-96,9%	**-100,0%**	-100,0%	-100,0%	**-97,7%**
June	**-92,3%**	**-98,4%**	-99,6%	-97,9%	**-81,2%**	-95,7%	**-100,0%**	-100,0%	-100,0%	**-93,8%**
July	**-80,4%**	**-78,6%**	-81,5%	-72,0%	**-82,9%**	-92,7%	**-90,4%**	-98,7%	-99,6%	**-85,4%**
August	**-68,4%**	**-53,0%**	-45,4%	-42,4%	**-86,6%**	-81,7%	**-52,8%**	-97,7%	-99,9%	**-73,3%**
September	**-70,2%**	**-54,7%**	-51,8%	-42,3%	**-87,9%**	-79,9%	**-54,3%**	-98,0%	-99,0%	**-73,9%**
October	**-60,2%**	**-50,7%**	-39,6%	-34,2%	**-81,7%**	-73,6%	**-29,3%**	-97,5%	-98,4%	**-65,6%**
November	**-81,7%**	**-74,1%**	-75,8%	-70,8%	**-89,5%**	-80,4%	**-31,8%**	-89,3%	-97,9%	**-81,1%**
December	**-83,8%**	**-82,7%**	-80,2%	-76,8%	**-85,8%**	-87,8%	**-71,8%**	-92,1%	-92,6%	**-86,0%**
Total	**-73,6%**	**-68,9%**	**-69,6%**	**-62,1%**	**-80,7%**	**-80,6%**	**-69,5%**	**-91,0%**	**-95,6%**	**-76,5%**

Source: Bank of Greece - Processing: INSETE Intelligence

See Appendix

Table 11: Receipts 2020

2020	Countries EE-27	Eurozone	of which		non Eurozone	Other	of which			Total	Cruises	Total
			France	Germany			U.K.	USA	Russia			
January	**80**	**98**	4	26	**-18**	200	**32**	25	7	**280**	**1**	**281**
February	**75**	**61**	5	17	**14**	145	**14**	26	2	**220**	**1**	**221**
March	**44**	**30**	5	6	**14**	46	**5**	9	2	**90**	**1**	**92**
April	**7**	**5**	0	1	**3**	6	**1**	0	0	**14**	**0**	**14**
May	**22**	**16**	1	6	**6**	22	**1**	0	0	**44**	**0**	**44**
June	**43**	**27**	2	13	**16**	40	**3**	0	0	**83**	**0**	**83**
July	**467**	**346**	45	153	**121**	110	**51**	3	0	**577**	**0**	**577**
August	**979**	**827**	170	308	**151**	394	**320**	6	0	**1.373**	**0**	**1.373**
September	**572**	**493**	77	255	**79**	254	**192**	3	1	**825**	**0**	**825**
October	**378**	**347**	51	246	**31**	147	**95**	2	1	**525**	**1**	**526**
November	**28**	**23**	1	9	**5**	33	**12**	4	0	**61**	**0**	**61**
December	**17**	**13**	1	4	**4**	17	**4**	1	0	**34**	**0**	**34**
Total	**2.840**	**2.390**	**367**	**1.135**	**451**	**1.434**	**749**	**83**	**13**	**4.275**	**6**	**4.280**

2019	Countries EE-27	Eurozone	of which		non Eurozone	Other	of which			Total	Cruises	Total
			France	Germany			U.K.	USA	Russia			
January	**89**	**76**	8	25	**13**	141	**17**	15	8	**230**	**1**	**230**
February	**93**	**70**	8	22	**22**	105	**24**	15	3	**197**	**1**	**198**
March	**132**	**105**	11	34	**26**	176	**30**	44	5	**308**	**10**	**318**
April	**258**	**228**	39	69	**30**	245	**41**	39	4	**504**	**40**	**543**
May	**831**	**721**	105	344	**110**	683	**259**	141	26	**1.514**	**52**	**1.566**
June	**1.384**	**1.122**	176	417	**262**	1.107	**374**	144	66	**2.492**	**66**	**2.558**
July	**1.993**	**1.528**	210	544	**465**	1.641	**547**	211	97	**3.633**	**69**	**3.703**
August	**2.352**	**1.812**	272	577	**540**	1.675	**620**	203	104	**4.027**	**78**	**4.104**
September	**1.583**	**1.220**	169	532	**363**	1.237	**455**	199	60	**2.820**	**66**	**2.886**
October	**734**	**630**	80	334	**105**	648	**152**	128	47	**1.382**	**80**	**1.462**
November	**141**	**114**	8	33	**27**	146	**18**	24	7	**287**	**29**	**315**
December	**123**	**106**	5	27	**18**	163	**27**	26	7	**286**	**8**	**294**
Total	**9.731**	**7.732**	**1.090**	**2.959**	**1.999**	**7.949**	**2.564**	**1.189**	**433**	**17.680**	**499**	**18.179**

% Changes	Countries EE-28	Eurozone	of which		non Eurozone	Other	of which			Total	Cruises	Total
			France	Germany			U.K.	USA	Russia			
January	**-9,7%**	**30,1%**	-46,6%	7,3%	**-232,9%**	41,8%	**86,4%**	71,3%	-21,3%	**21,9%**	**-11,5%**	**21,8%**
February	**-18,6%**	**-12,7%**	-33,0%	-25,3%	**-37,1%**	38,4%	**-40,9%**	70,7%	-27,3%	**11,7%**	**-28,8%**	**11,5%**
March	**-66,5%**	**-71,5%**	-51,0%	-82,0%	**-46,2%**	-73,8%	**-82,5%**	-79,3%	-62,4%	**-70,6%**	**-88,4%**	**-71,2%**
April	**-97,1%**	**-98,0%**	-99,5%	-98,6%	**-90,5%**	-97,4%	**-98,2%**	-99,7%	-99,8%	**-97,3%**	**-100,0%**	**-97,5%**
May	**-97,4%**	**-97,8%**	-98,8%	-98,3%	**-94,4%**	-96,8%	**-99,6%**	-99,9%	-100,0%	**-97,1%**	**-100,0%**	**-97,2%**
June	**-96,9%**	**-97,6%**	-99,1%	-97,0%	**-93,9%**	-96,3%	**-99,2%**	-99,8%	-100,0%	**-96,7%**	**-100,0%**	**-96,8%**
July	**-76,6%**	**-77,4%**	-78,8%	-71,8%	**-74,0%**	-93,3%	**-90,6%**	-98,7%	-99,6%	**-84,1%**	**-100,0%**	**-84,4%**
August	**-58,4%**	**-54,3%**	-37,4%	-46,7%	**-71,9%**	-76,5%	**-48,4%**	-97,0%	-99,9%	**-65,9%**	**-100,0%**	**-66,5%**
September	**-63,9%**	**-59,6%**	-54,3%	-52,1%	**-78,3%**	-79,5%	**-57,8%**	-98,7%	-99,1%	**-70,7%**	**-100,0%**	**-71,4%**
October	**-48,5%**	**-44,9%**	-36,0%	-26,4%	**-70,3%**	-77,3%	**-37,3%**	-98,7%	-97,6%	**-62,0%**	**-98,6%**	**-64,0%**
November	**-80,2%**	**-80,0%**	-85,6%	-73,0%	**-80,9%**	-77,5%	**-36,6%**	-83,0%	-99,4%	**-78,8%**	**-100,0%**	**-80,8%**
December	**-86,2%**	**-87,8%**	-74,5%	-86,6%	**-77,0%**	-89,9%	**-84,3%**	-95,7%	-96,6%	**-88,3%**	**-100,0%**	**-88,6%**
Total	**-70,8%**	**-69,1%**	**-66,3%**	**-61,6%**	**-77,5%**	**-82,0%**	**-70,8%**	**-93,0%**	**-96,9%**	**-75,8%**	**-98,8%**	**-76,5%**

Source:Bank of Greece - Processing: INSETE Intelligence

See Appendix

5 Accommodation Services

5.1 Greek hotel activity, 2020

5.1.1 Greek hotel revenues[2]

Hotel revenues amounted to only €1.8 billion in 2020, down by -78.1% compared to 2019, when total turnover was €8.3 billion *(Table 12)*. More specifically, revenues for 5-star hotels in 2020 were €719 million compared to €3 billion in 2019, showing a decrease of -76.1%. In the 4-star category, a decrease of -77.5% was recorded, with the turnover in 2020 amounting to €638 million compared to €2.8 billion in 2019. In the 3-star category there was a -82.1% decrease, with 2020's turnover dropping to 241 million compared to €1.3 billion in 2019. The largest percentage decrease was recorded in the 2-star category, with an -83.0% decrease in turnover, which amounted to only €176 million compared to €1 billion in 2019. The smallest percentage decrease (-58.2%) was recorded in the 1-star category, with turnover dropping to €57 million compared to €136 million in 2019.

Table 12: Hotel revenues 2020

Category	2020	2019	%Δ
5*	719.325.978	3.007.494.439	-76,1%
4*	637.844.486	2.830.655.326	-77,5%
3*	240.625.973	1.344.389.350	-82,1%
2*	176.388.840	1.038.334.014	-83,0%
1*	57.168.669	136.793.970	-58,2%
Total	**1.831.353.946**	**8.357.667.099**	**-78,1%**

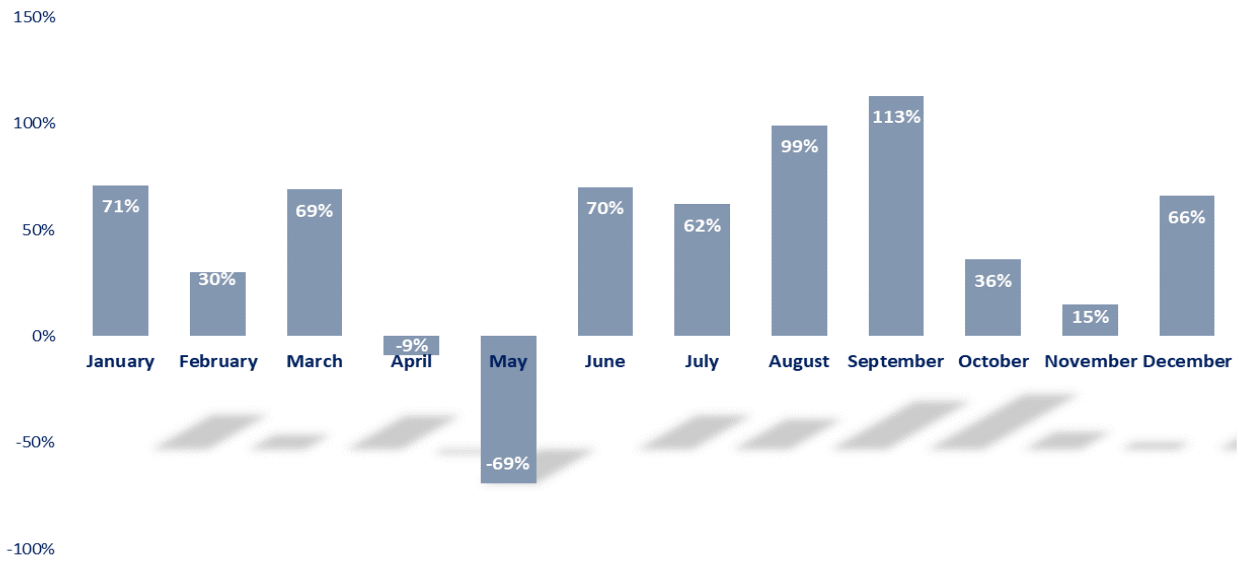
Source: ITEP – Processing: INSETE Intelligence

[2] Source: RIT (2021, January 18)

5.1.2 Change in revenue in selected accommodations[3]

Another survey presents a similar picture *(Graph 5),* recording a -77.1% decrease in revenues for 2020. With the exception of January –during which a +13.3% increase was recorded–, all other months showed a decrease. More specifically, a small decrease was recorded in February (-3.7%). A large decrease was recorded in March (-77.6%), April (-99.3%), May (-98.8%) and June (-97.0%). In July, the decrease was -80.9%, in August -66.9% and in September -69.2%. Finally, a decrease of -62.6% was recorded in October, while for November and December the decrease was -88.6% and -90.9%, respectively.

Graph 5: Change in revenue in selected accommodations



Source: GBR, Hellenic Hoteliers Federation – Processing: INSETE Intelligence

[3] Source: GBR Consulting – Hellenic Hoteliers Federation. The survey is based on a census and, as such, its results may not be assumed to reflect the general population, since the sample is not representative in terms of the number of accommodation units in Greece.

5.1.3 Activity indicator: Travel Health Index[4]

The Travel Health Index (THI) compares the current number of published hotel reviews to last year's levels. It is calculated globally and per country (for countries with over 10 reviews per week) and is based on a weekly time frame, since the situation changes quickly.

- THI = (published hotel reviews last week / published hotel reviews same time frame last year)

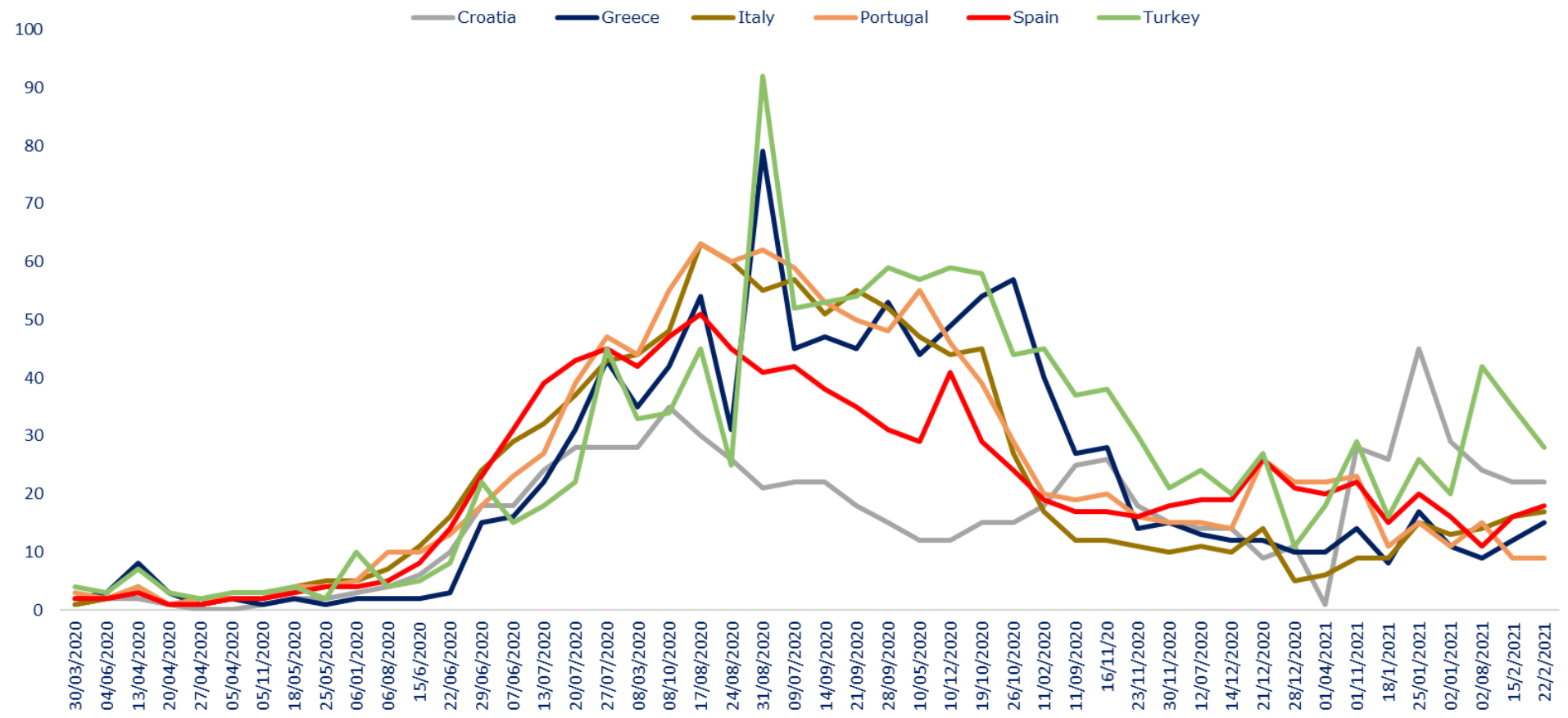
Based on the THI in Greece and competing countries *(Graph 6)*, the signs of recovery made their appearance at the end of July, presenting a much better situation compared to all other continents. The summer months created a slight increase in the number of guest reviews for most countries, indicating a higher occupancy rate at the seasonal travel peak. On the contrary, a significant decrease in THI was recorded in early November due to the second wave of COVID-19.

The initial recovery showed a similar trend. Indicatively, on 27/07/2020, Portugal's THI was 47, followed by Spain and Turkey with a THI of 45 each, Greece and Italy with a THI of 43 each, and Croatia at a lower level with a THI of 28. A significant difference in the recovery rate was recorded at the end of August (31/08/2020), when Turkey and Greece found themselves in the highest positions with a THI of 92 and 79 respectively, while all other countries followed with a THI level below 60. Following this, a new recession began, which reached its peak at the end of 2020.

On 22/2/2021, all competing countries – including Greece– entered a new state of recession, after a marginal recovery recorded on 25/01/2021 for all countries under examination. More specifically, on 22/2/2021, Portugal held the lowest position with a THI of 9, while Greece and Italy were also at a very low level with a THI of 15 and 17 respectively. The highest position was taken by Turkey with a THI of 28, followed by Croatia and Spain with a THI of 22 and 18, respectively.

[4] The Travel Health Index has been developed by TrustYou

Graph 6: Travel Health Index



Source: TRUSTYOU – Processing: INSETE Intelligence

5.1.4 Activity indicator: Analysis of changes in the number of comments about hotels

Another index –similar to the THI *(see 5.1.3)*– is the one measuring the changes in the number of comments about hotels in 2020 –per star category and per region– in relation to the corresponding number of comments in 2019. More specifically *(Table 13)*, it is worth noting that in 2020 –in the whole country– the number of comments about hotels decreased by -61% compared to 2019, with significant fluctuations during the year: initially (in January and February) a significant increase was recorded, while thereafter, due to the imposition of lockdown, the decline in activity was almost universal. Following this and starting in July, there was a significant recovery which lasted until the end of October and then –especially in December, with the imposition of major restrictive measures once again– an almost universal decline in activity was recorded once more.

Table 13: Change of comments per month

	J	F	M	A	M	J	J	A	S	O	N	D	Average
Greece	**6%**	**23%**	**-53%**	**-97%**	**-97%**	**-94%**	**-74%**	**-58%**	**-60%**	**-59%**	**-77%**	**-91%**	**-61%**
5*	6%	25%	-52%	-97%	-97%	-96%	-77%	-60%	-58%	-53%	-72%	-87%	-60%
4*	8%	25%	-57%	-97%	-97%	-95%	-74%	-59%	-60%	-60%	-80%	-93%	-62%
3*	-1%	14%	-54%	-98%	-97%	-93%	-73%	-57%	-62%	-65%	-80%	-92%	-63%
1*-2*	12%	28%	-48%	-97%	-97%	-92%	-71%	-55%	-62%	-61%	-76%	-91%	-59%
Eastern Macedonia & Thrace	11%	12%	-50%	-97%	-97%	-80%	-65%	-67%	-59%	-55%	-81%	-90%	-60%
Attica	2%	16%	-57%	-97%	-97%	-94%	-74%	-64%	-64%	-63%	-82%	-90%	-64%
North Aegean	15%	22%	-49%	-95%	-93%	-95%	-87%	-78%	-78%	-74%	-80%	-87%	-65%
Western Macedonia	9%	52%	-44%	-97%	-95%	-85%	-76%	-80%	-77%	-66%	-89%	-96%	-62%
Dodecanese	16%	28%	-41%	-96%	-98%	-98%	-82%	-57%	-56%	-41%	-49%	-78%	-54%
Epirus	10%	54%	-50%	-97%	-97%	-85%	-56%	-50%	-54%	-63%	-82%	-97%	-56%
Thessaly	2%	27%	-51%	-98%	-96%	-87%	-63%	-52%	-62%	-51%	-77%	-96%	-59%
Ionian Islands	47%	52%	-37%	-97%	-98%	-98%	-80%	-59%	-64%	-72%	-82%	-94%	-57%
Central Macedonia	3%	27%	-55%	-97%	-97%	-91%	-69%	-68%	-71%	-66%	-85%	-94%	-64%
Crete	-3%	29%	-41%	-98%	-98%	-98%	-77%	-52%	-54%	-56%	-65%	-83%	-58%
Cyclades	-7%	-7%	-64%	-97%	-98%	-98%	-78%	-48%	-54%	-67%	-77%	-88%	-65%
Peloponnese	10%	31%	-59%	-97%	-96%	-87%	-57%	-46%	-55%	-53%	-72%	-89%	-56%
Central Greece	15%	50%	-47%	-98%	-97%	-84%	-57%	-47%	-54%	-52%	-77%	-95%	-54%

Source: ReviewPro - Processing: INSETE Intelligence

See Appendix

5.1.5 Arrivals of residents and non-residents in hotels and similar establishments – January-September 2020

In the period January-September 2020, a -69.3% decrease in arrivals was recorded across all hotels and similar establishments *(Table 14)*. Arrivals during the reference period were estimated at 7.1 million compared to 23.2 million during the corresponding period in 2019.

More specifically, in the period January-September 2020, arrivals of non-residents recorded a decrease of -78.5% while those of residents decreased by -41.7%, both compared to the data of the same period in 2019. The largest share of arrivals in hotels and similar establishments for the period January-September 2020 pertains to non-residents (3.8 million), while the arrivals of residents were 3.3 million. Moreover, despite the decrease in inbound visitor flows during July, August and September, arrivals of non-residents exceeded those of residents.

Table 14: Arrivals spent in hotels, similar establishments and tourist campsites January – September 2020

	2020			2019			%Δ		
	Total	Residents	Non- residents	Total	Residents	Non- residents	Total	Residents	Non- residents
January	766.144	521.199	244.945	640.004	431.834	208.170	19,7%	20,7%	17,7%
February	817.523	566.874	250.649	683.287	439.306	243.981	19,6%	29,0%	2,7%
March	298.720	190.774	107.946	1.028.775	592.263	436.512	-71,0%	-67,8%	-75,3%
April	15.185	12.032	3.153	1.853.647	672.064	1.181.583	-99,2%	-98,2%	-99,7%
May	32.760	28.476	4.284	2.996.572	579.757	2.416.815	-98,9%	-95,1%	-99,8%
June	321.234	265.994	55.240	3.776.270	697.685	3.078.585	-91,5%	-61,9%	-98,2%
July	1.332.900	584.147	748.753	4.175.095	789.609	3.385.486	-68,1%	-26,0%	-77,9%
August	2.095.291	794.876	1.300.415	4.453.635	961.142	3.492.493	-53,0%	-17,3%	-62,8%
September	1.461.261	416.832	1.044.429	3.647.214	639.787	3.007.427	-59,9%	-34,8%	-65,3%
Total	**7.141.018**	**3.381.204**	**3.759.814**	**23.254.499**	**5.803.447**	**17.451.052**	**-69,3%**	**-41,7%**	**-78,5%**

Source: ELSTAT – Processing: INSETE Intelligence

5.1.6 Nights spent by residents and non-residents in hotels and similar establishments – January-September 2020

In the period January-September 2020, a -73.2% decrease was recorded in the number of nights spent in all hotels and similar establishments *(Table 15)*.

More specifically, in the period January-September 2020, nights spent by non-residents showed a decrease of -78.5% while nights spent by residents recorded a decrease of -41.3%, both compared to the data of the same period in 2019. The largest share of nights spent in hotels and similar establishments for the period January-September 2020 pertains to non-residents (17.9 million), while the nights spent by residents were 8 million.

Table 15: Overnights spent in hotels, similar establishments and tourist campsites January – September 2020

Overnights spent in hotels, similar establishments and tourist campsites									
	2020			2019			%Δ		
	Total	Residents	Non- residents	Total	Residents	Non- residents	Total	Residents	Non- residents
January	1.543.118	987.695	555.423	1.363.290	857.470	505.820	13,2%	15,2%	9,8%
February	1.650.037	1.052.824	597.213	1.432.081	838.666	593.415	15,2%	25,5%	0,6%
March	727.899	421.550	306.349	2.210.517	1.165.842	1.044.675	-67,1%	-63,8%	-70,7%
April	49.310	34.347	14.963	5.499.018	1.453.384	4.045.634	-99,1%	-97,6%	-99,6%
May	78.932	61.299	17.633	11.748.128	1.165.868	10.582.260	-99,3%	-94,7%	-99,8%
June	691.425	526.699	164.726	16.741.941	1.568.024	15.173.917	-95,9%	-66,4%	-98,9%
July	5.172.663	1.457.562	3.715.101	20.240.224	2.165.618	18.074.606	-74,4%	-32,7%	-79,4%
August	9.368.584	2.539.077	6.829.507	21.435.611	3.027.762	18.407.849	-56,3%	-16,1%	-62,9%
September	6.668.273	949.326	5.718.947	16.309.875	1.448.300	14.861.575	-59,1%	-34,5%	-61,5%
Total	**25.950.241**	**8.030.379**	**17.919.862**	**96.980.685**	**13.690.934**	**83.289.751**	**-73,2%**	**-41,3%**	**-78,5%**

Source: ELSTAT – Processing: INSETE Intelligence

5.2 Impact on liquidity[5]

5.2.1 Receivables 2020

Part of the cash shortage of hotels is due to the receivables for 2020, which amount to €278 million *(Table 16)*. More specifically, in the 5-star category, receivables are estimated at €111 million (15.4% of the category's total revenue). This is followed by the 4-star category, with receivables estimated at €91 million (14.2% of the total revenue). With regard to the 3-star and 2-star categories, the corresponding figures are €35 million and €25 million respectively, while in both cases these figures account for 14.4% of the total revenue. Finally, in the 1-star category, receivables amount to €12 million (21.4% of the total revenue) and is the highest of all categories.

Table 16: Receivables per hotel category

Category	Amount	%
5*	110.766.811	15,4%
4*	90.578.883	14,2%
3*	34.652.040	14,4%
2*	25.401.386	14,4%
1*	12.234.766	21,4%
Total	**278.365.800**	**15,2%**

Source: ITEP – Processing: INSETE Intelligence

[5] Source: RIT (2021, January 18)

5.2.2 Decrease of advance payments to Greek hotels 2021

The -83.3% decrease in advance payments for 2021 had a major negative impact on the hotels' liquidity *(Table 17)*. More specifically, the largest reduction in advance payments (-79.6%) occurred in the 5-star category, with advance payments amounting to €68 million compared to the €333 million of a typical year. The largest percentage decrease (-90.7%) was recorded in the 4-star category, with advance payments amounting to barely €21 million compared to the €230 million of a typical year. In the 3-star category, advance payments for 2021 amounted to €17 million compared to the €105 million of a typical year, showing a decrease of -83.6%. Finally, in the 2-star category, advance payments amounted to €13 million while in the 1-star category they amounted to €4 million, showing a decrease of -72.5% and -84.5%, respectively.

Table 17: Advance payments to Greek Hotels 2021

Category	Advance payments 2021	Advance payments in a typical year	%Δ
5*	67.955.030	333.322.331	-79,6%
4*	21.363.511	230.317.031	-90,7%
3*	17.290.685	105.518.253	-83,6%
2*	13.065.636	47.489.719	-72,5%
1*	4.205.409	27.098.421	-84,5%
Total	**123.880.271**	**743.745.755**	**-83,3%**

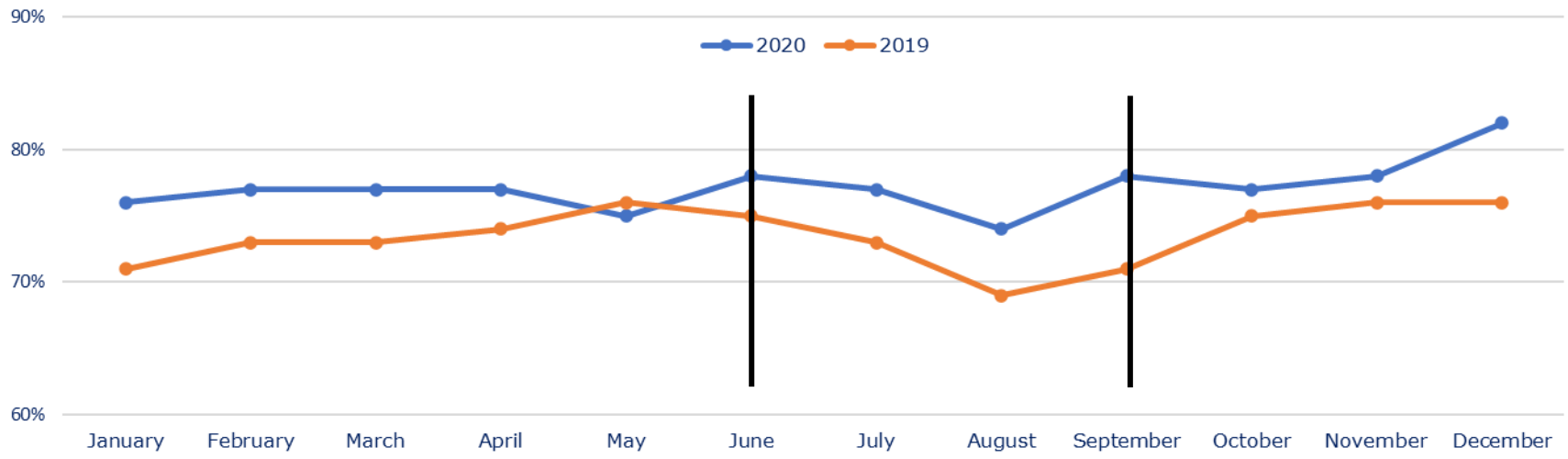
Source: ITEP – Processing: INSETE Intelligence

Overall, hotel liquidity decreased by €900 million and this was due to the €278 million worth of receivables and the €744 million decrease in advance payments for 2021.

5.3 Net Sentiment Index

In today's digital era, many customers use social media channels and niche review websites to upload feedback about their experiences. Social listening tools use this information in order to capture how internet users feel about various issues. Especially for the hotel industry, evaluating the emotions evoked by the experience of staying in a hotel helps comprehending the guests' level of satisfaction regarding their stay in the specific hotel. The Net Sentiment Index (NSI) is calculated by subtracting the percentage of negative feedback posted on the internet from the percentage of positive feedback. The feedback is gathered from social media platforms, hotel review websites, and websites of OTAs (online travel agents). Results for the years 2019 and 2020 are presented in *Graph 7*. It can be seen that, with the exception of May, users rated their experience in 2020 as better than that of 2019, especially regarding the period July-September: in July 2020, the NSI was 77% compared to 73% in the corresponding month of 2019, in August it was 74% compared to 69% in 2019, and in September it was 78% compared to 71% in 2019. The highest NSI value of 2020 was recorded in December with 82%.

Graph 7: Net sentiment index (NSI)



Source: Review Pro – Processing: INSETE Intelligence

6 Quality Ratings

6.1 Quality ratings for Greece

Table 18 shows the Global Review Index (GRI) for Greece for the years 2020 and 2019. In 2020, Greece's GRI for hotels was at 87.4% compared to 87.1% in 2019. It is worth noting that all individual ratings for hotels improved during 2020. Three ratings rose higher than the GRI, driving it upwards: the ratings for Reception (94.0%), Cleanliness (91.6%) and Service (89.5%). As mentioned earlier, the other ratings improved as well. The rating for Location was at 87.2% while the rating for Value for Money was at 85.2%. The ratings for Room and for Food and Drink were at a lower level (84.6% and 84.3%, respectively). The only rating that lingered below 80% despite its improvement was that for Entertainment, with 79.2%.

Table 18: Quality Indexes

Greece	2020	2019	Change
Cleanliness	91,6%	90,3%	▲
Food & Drink	84,3%	83,9%	▲
Location	87,2%	86,6%	▲
Service	89,5%	88,8%	▲
Value for Money	85,2%	84,4%	▲
Room	84,6%	83,6%	▲
Entertainment	79,2%	77,6%	▲
Reception	94,0%	88,2%	▲
GRI	**87,4%**	**87,1%**	▲

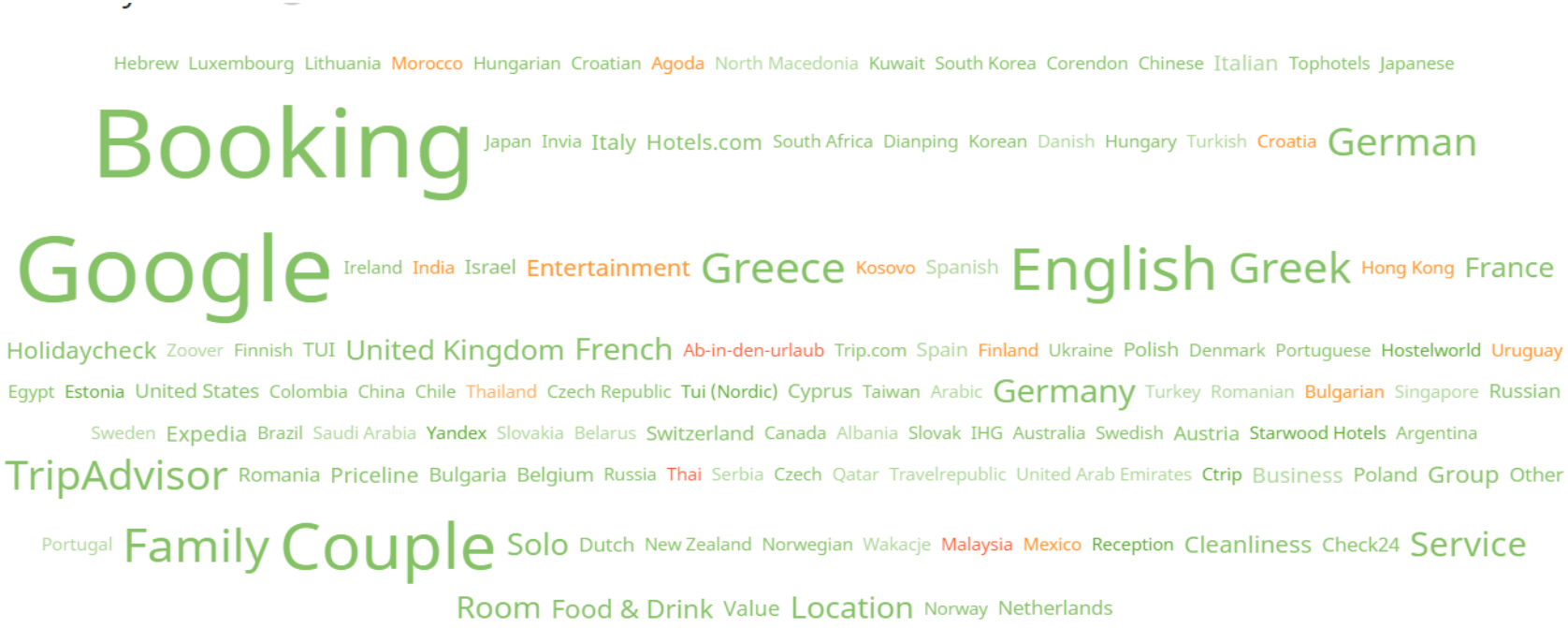
Source: ReviewPro - Processing: INSETE Intelligence

See Appendix

6.2 GRI - The topic cloud

The topic cloud *(Graph 8)* provides a quick and visual way to identify the key drivers that are affecting the hotels' GRI. The bigger the word the higher the volume of reviews for this driver. The darker the green the more positive the rating, the darker the red the more negative the rating, and the darker the orange the higher end of the neutral scale the rating is. We may look at some obvious points, such as the comment sources: "Booking", "TripAdvisor", "Google", etc. There are also keywords that indicate the positive attitude of visitors: depending on the type of visitor ("Couple", "Family", "Solo" and "Group") and the visitor's country of origin ("English", "German", "Germany", "France" etc.). However, what definitely stands out is the presence of the positive comments about hotels and services which were widely discussed online in 2020, such as "Service", "Location", "Room" and "Food and Drink".

Graph 8: Topic cloud



Source: Review Pro – Processing: INSETE Intelligence

6.3 Top–10 of categories with positive mentions

The top-10 of the main thematic categories that generated the most positive online mentions for 2020 resulted from the semantic analysis of the comments *(Table 19)*. It is worth noting that –as regards the categories that appear in the top-10 of positive mentions and in the top-15 of negative mentions– positive mentions are significantly more than the negative ones. The first place is taken by the Food and Drink category –with 70 thousand mentions–, with most positive mentions containing the keyword "food". This is followed by the Establishment category with 41 thousand mentions, most of which contain the word "hotel". The Staff category generated more than 40 thousand positive mentions. This is followed by the Experience category (with 33 thousand mentions) and the Cleanliness category (with 27 thousand mentions). Approximately 16 thousand positive mentions emerged for the Beach category, with most mentions containing the keyword "sea". This is followed –in seventh place– by the Service category (with 11 thousand mentions) and the Entertainment category (with 10 thousand mentions), with the main keyword being "animation team". The ninth place is taken by the Ambience category, with the keyword "quiet". The "Safety" thematic category completes the top-10, with barely 3 thousand mentions.

Table 19: Top – 10 Positive Mentions

Rank	Categories	Positive Mentions	Top Concept
1	Food and Drinks	69.859	Food
2	Establishment	40.915	Hotel
3	Staff	39.289	Staff
4	Experience	33.098	Everything
5	Cleanliness	27.349	Cleanliness
6	Beach	16.295	Sea
7	Service	10.844	Service
8	Entertainment	10.534	Animation Team
9	Ambience	9.860	Quiet
10	Security	2.898	Security

Source: Review Pro – Processing: INSETE Intelligence

See Appendix

6.4 Top–15 of categories with negative mentions

The top-15 of the main thematic categories that generated the greatest number of negative online mentions for 2020 resulted from the semantic analysis of the comments *(Table 20)*. The first place is taken by the Food and Drink category –with 22 thousand mentions–, with most negative mentions containing the keyword "drink". This is followed by the Room category with 18 thousand mentions, most of which contain the keyword "noise". The Establishment category generated more than 9 thousand negative mentions, with the main keyword being "hotel". This is followed by the Facilities category with 9 thousand mentions and "water" as the keyword. The negative mentions containing the word "water" made specific reference to freezing water in swimming pools, poor swimming pool maintenance, and the lack of hot water in the bathroom during the stay.

The Cleanliness category occupies the fifth place with 7 thousand mentions and "dirt" as the key driver. About 6,000 negative mentions were generated by the Experience category, with the majority of mentions containing the keyword "visitor". This is followed –in the seventh place– by the Value for Money category with 6 thousand mentions and the keyword "payment", with specific references to problems in making payments through POS terminals. The Staff category is next with 5 thousand mentions; the main keyword is "communication", mainly referring to the difficulties in communicating with the staff because of their poor use of English, but also of German. The ninth place is taken by the Bathroom category with 4 thousand mentions, while the Medical and Health thematic category completes the top-10 with barely 4 thousand mentions and "virus" as the key driver.

The eleventh place is taken by the Location category with 4 thousand mentions, most of which contain the keyword "bus", mainly referring to unreliable route schedules and difficult access to ports and airports. This is followed by the Entertainment category with 3 thousand mentions, most of which contain the key driver "music", either referring to its being too loud or not available. More than 3 thousand negative mentions emerged for the Service thematic category, with its keyword being "queue". The 14th place is taken by the Beach thematic category, mainly due to the trash found on beaches, while the Bed thematic category was in the last place with many negative mentions about "mattresses".

Table 20: Top – 15 Negative Mentions

Rank	Categories	Negative Mentions	Top Concept
1	Food and Drinks	22.328	Drink
2	Room	18.322	Noise
3	Establishment	9.433	Policy
4	Facilities	8.535	Water
5	Cleanliness	7.032	Dirty
6	Experience	6.830	Guest
7	Value	6.397	Payment
8	Staff	5.180	Communication
9	Bathroom	4.702	Bathroom
10	Medical and Health	4.325	Virus
11	Location	3.892	Shuttle
12	Entertainment	3.300	Music
13	Service	3.262	Queue
14	Beach	2.724	Beach
15	Bed	2.616	Mattress

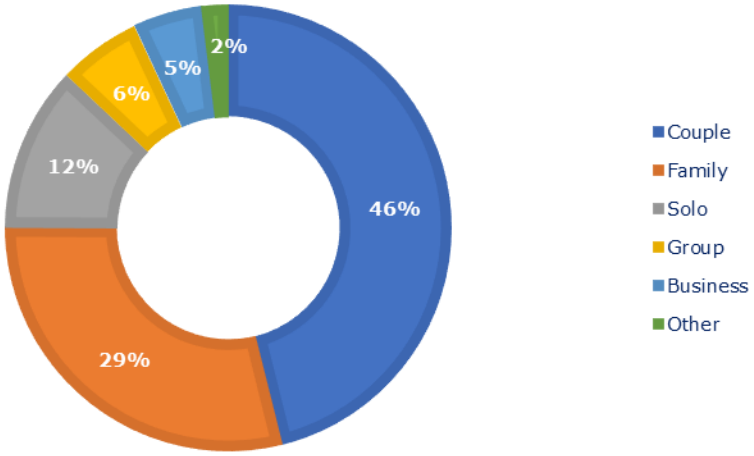
Source: Review Pro – Processing: INSETE Intelligence

See Appendix

6.5 Travel type based on comment analysis

As shown in *Graph 9* and based on comment analysis, 75% of comments derive from two travel type categories: 46% relates to couple travel and 29% to family travel. Solo travellers account for 12% of comments while group travellers account for 6%. Finally, business trips only account for 5% of comments.

Graph 9: Travel type

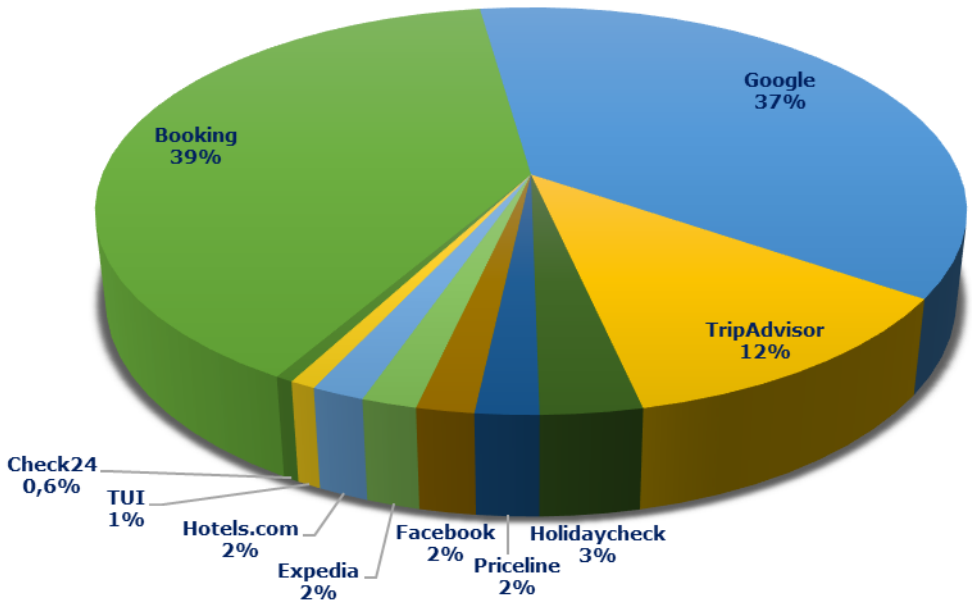


Source: Review Pro – Processing: INSETE Intelligence

6.6 Top–10 of comment sources

As shown in *Graph 10*, the main online comment sources for 2020 are Booking (39%) and Google (37%). The third place is taken by TripAdvisor (12%), while other sources account for less than 5%. HolidayCheck accounts for 3% while Facebook, Priceline, Expedia and Hotels.com account for 2% each. Finally, TUI (1%) and Check24 (0.6%) complete the top-10.

Graph 10: Top – 10 Sources



Source: Review Pro – Processing: INSETE Intelligence

7 Workforce Survey

7.1 Accommodation and food service activities

During the first quarter of 2020, 329 thousand employees were recorded as working in the field of accommodation and food services, showing a marginal increase of +2%, while in the second quarter –that is, during Greece's first lockdown– a -20% decrease in the number of employees was recorded. More specifically, 321 thousand employees were recorded compared to 403 thousand for the corresponding quarter in 2019. In the third quarter –the high season–, 396 thousand employees were recorded for 2020, compared to 429 thousand in 2019, showing a decrease of -8%.

Graph 11: Evolution of employees in the accommodation and food services sectors

Source: EL. STAT – Processing: INSETE Intelligence

8 Car Rentals

8.1 The structure of the car rental market

The services provided by the car rental sector are considered essential for almost all types of a country's tourism development. In Greece, the car rental sector has been operating as part of the broader tourism development for the last forty years. Car rentals decreased dramatically in 2020 due to the restrictive measures taken to deal with the COVID-19 outbreak, while –according to some preliminary estimates– sales are not expected to reach pre-pandemic levels before 2023-2024. The great reduction in the number of inbound visitors had a great impact on the sector, as these visitors usually account for the largest share of Greece's car rental transactions. Fleet sizes were reduced as companies either cancelled car purchases or redirected them towards leasing.

According to the data of *Table 21*, it is estimated that 2,039 car rental companies operated in the country during 2020, recording 2,350 thousand transactions. The total fleet of rental cars is estimated to stand at 83,300 vehicles. In 2020, there was a -15.9% decrease in fleet sizes, a -10.0% decrease in the number of car rental companies, and a -50.0% decrease in transactions.

Table 21: Structure of Car Rental Market

	2020	2019	2018	2017	2016	2020/19	2019/2018	2018/2017	2017/2016
Fleet Size	83.300	99.000	90.000	80.000	61.800	-15,9%	10,0%	12,5%	29,4%
Operators	2.039	2.265	2.335	2.347	2.335	-10,0%	-3,0%	-0,5%	0,5%
Transactions (thousand)	2.350	4.701	4.018	3.856	3.500	-50,0%	17,0%	4,2%	10,2%

Source:Euromonitor– Processing: INSETE Intelligence

See Appendix

8.2 Car rental activity

In 2020, sales amounted to €150.6 million, compared to €338.7 million in 2019. In total, sales decreased by -55.5% in 2020, after increasing by +2.0% in 2019.

The volume of sales as regards leisure rentals was estimated at €142.7 million, compared to €317.2 in 2019, showing a decrease of -55.0%. The decrease in business rentals was -64.7%, while sales were estimated at €7.3 million, compared to €20.7 million in 2019.

Table 22: Car Rental Sales in mil. €

Rental	2020	2019	2018	2017	2016	2020/19	2019/2018	2018/2017	2017/2016
Business	7,3	20,7	20,3	19,8	19,5	-64,7%	2,0%	2,5%	1,5%
Leisure	142,7	317,2	311,0	288,3	266,9	-55,0%	2,0%	7,9%	8,0%
Insurance	0,6	0,8	0,7	0,7	0,7	-25,0%	14,3%	0,0%	0,0%
Total	**150,6**	**338,7**	**332,0**	**308,8**	**287,1**	**-55,5%**	**2,0%**	**7,5%**	**7,6%**

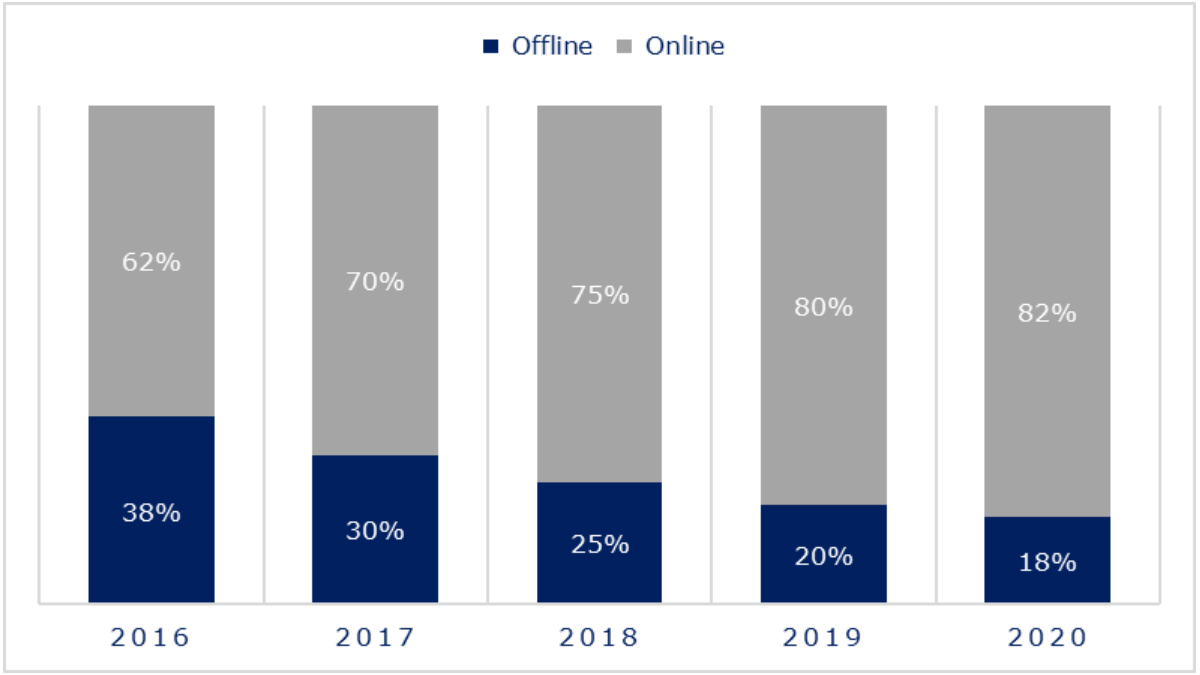
Source:Euromonitor– Processing: INSETE Intelligence

See Appendix

8.3 Car rental channels

Online sales have been constantly increasing every year since 2015. Indicatively, in 2015 the share of online sales stood at only 62%, compared to 38% for offline sales. In 2020, sales in the car rental business amounted to €150.6 million, 82% (€124.3 million) of which were made online and 18% (€26.4 million) offline.

Graph 12: Channels of booking



Source: Euromonitor – Processing: INSETE Intelligence

8 Annex: Notes and clarifications of the data in tables and graphs

International airport arrivals: The data show arrivals of passengers of international flights, irrespective of their domicile. The data for the last available month for the Athens International Airport are an estimate of INSETE Intelligence. Airports are classified as follows: Dodecanese: Rhodes - Kos – Karpathos, Crete: Heraklion - Chania, Ionian: Corfu - Zakynthos - Kefalonia - Aktio, Cyclades: Mykonos - Santorini, Peloponnese: Araxos - Kalamata, Other: Samos - Skiathos - Kavala - Lesvos.

Domestic arrivals at main Greek airports: Passengers travelling round trip are counted twice: both when arriving at their destination and when returning home. The data for the last available month for the Athens International Airport are an estimate of INSETE Intelligence. Airports are classified as follows: Dodecanese: Rhodes - Kos - Karpathos, Crete: Heraklion - Chania, Ionian: Corfu - Zakynthos - Kefalonia - Aktio, Cyclades: Mykonos - Santorini - Paros, Other: Samos - Skiathos - Kavala - Lesvos.

Road arrivals: Road arrivals are recorded by the local police departments based on nationality, irrespective of the permanent domicile. Consequently, the data include immigrants in Greece returning from trips abroad. Countries are classified as follows: Albania: Kakavia - Krystallopigi - Sagiada - Mertzani, Bulgaria: Ormenio - Kyprinos - Nymphaea - Promachonas - Exochi - Agios Konstantinos, Republic of North Macedonia: Evzoni - Doirani - Niki, Turkey: Kastanies – Kipoi.

ReviewPro quality ratings: The tables show the GRI® for hotel guests as calculated by ReviewPro®, a company which specializes in measuring the online reputation of hotels. This index is calculated for each hotel, through the analysis of variables linked to customer comments which are posted on hundreds of social network platforms, hotel review websites, and websites of OTAs (online travel agents). Apart from daily reviews, it also takes into account the historical data for the past 365 days, thus adding more weight to the more recent reviews. A rating of over 80% suggests a positive experience. The index is qualitative and can be used to evaluate the progress of the quality of services provided. For the purposes of calculation, data on 1,126 hotels of various categories and different regions of Greece have been analysed.

TrustYou quality ratings: The Travel Health Index (THI) was presented by TrustYou - The Power to Listen due to the widespread limitations on travel, as there is currently an unprecedented drop in hotel stays. The Travel Health Index is a KPI only available from the world's largest guest review database, which benchmarks current review activity with the normal levels of the previous year.

- THI = (published hotel reviews last week / published hotel reviews in the same time frame last year)

Sources

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