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## **Summary**

This special edition of the Statistical Bulletin presents tourism data for 2022 and the recovery in tourism activity.

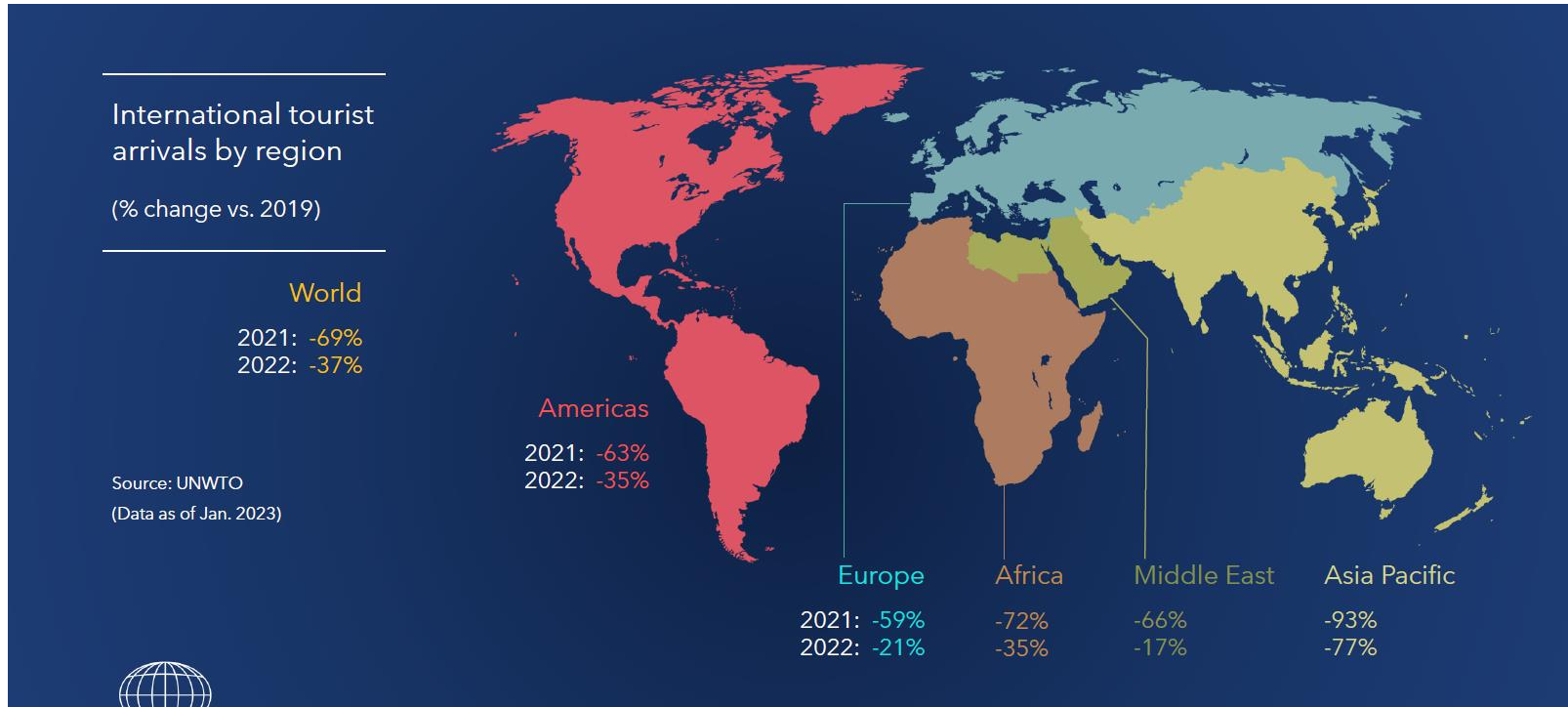
- International tourist arrivals worldwide in 2022 decreased by -37% relative to 2019, compared to -69% in 2021. More than 900 million tourists travelled internationally in 2022, double those in 2021, though still 37% fewer than in 2019.
- Greece's performance improved significantly, with inbound travel flows decreased by -11.2% compared to 2019 and amounting to 27.8 million visitors, down from 31.3 million visitors in 2019. Furthermore, travel receipts decreased by just -3.0% compared to 2019 and amounted to €17.6 billion, compared to €18.2 billion in 2019, due to an increase in the Spending per Person (SPP) of +9.7% in 2022 compared to 2019 (from €564 to €619).
- This, among other things, was due to a change in the mix of arrivals in favour of international airport arrivals, which have the highest SPP and saw a marginal decrease of -0.2% (there were 21.4 million international airport arrivals in 2022, compared to 21.5 million in 2019). Maritime arrivals from Italy decreased by -19% in 2022 (1.2 million passengers compared to 1.5 million in 2019), while road arrivals – which have the lowest SPP – decreased by -35.2% (8.0 million in 2021 compared to 12.3 million in 2019).
- It is noteworthy that of the €547.5 million less in revenues in 2022, compared to those in 2019, €392.1 million was due to the loss of the Russian market and €91.3 million to a decrease in cruises, amounting to €483.4 million overall. As regards all other activity, revenues were down from 2019 by just €64.1 million.
- With regard to destinations and in relation to 2019, a significant increase was noted in airport arrivals at the Sun and Beach designations (Crete +5.8%, Dodecanese +7%, Ionian +12.7% and Cyclades +33%), while a marked decrease was noted at others (Athens -13.4%, Thessaloniki -15.6%, Peloponnese -11.9%).
- The increase in demand for Sea and Beach destinations is reflected in the clear improvement in demand indicators from the 2<sup>nd</sup> quarter onward and particularly during the 3<sup>rd</sup> quarter (compared to 2019: decreased airport arrivals up to and including June, and then increasing; reduction in domestic maritime arrivals in all quarters, except the third, when there was an increase; and lastly, hotel revenues showed a negative change at the start of the year, which became positive from May onward).
- From EU27 markets, receipts from euro area residents amounted to €8,020 million, up by +3.7% from 2019, while receipts from residents outside the euro area came to €1,959 million, for a decrease of -2.0%.

- As for non-EU countries, receipts from the USA also increased, by +0.6%, and came to €1,196 million and from the United Kingdom by +21.8%, amounting to €3,123 million.
- In 2022, cruise ship arrivals were estimated at 4,775, compared to 3,979 arrivals in 2019, for an increase of +20%. By contrast, passenger estimates came to 4.6 million visitor arrivals, compared to 5.5 million arrivals in 2019, for a decrease in visitor arrivals of -17%. In other words, a significant decrease in the number of passengers per cruise ship is noted.
- With regard to domestic tourism, airport arrivals decreased by -6.9% and maritime arrivals by -8.0%, both compared to 2019.
- The hotel quality assessment for 2022 remained quite high (with a Global Review Index [GRI] of 87.0% and a Net Promoter Score [NPS] of 50), at the same levels as in 2019 (with 87.1% and 50 respectively).
- At the peak of the tourist season (Q3) in 2022, employment in the accommodation and food services sector (445 thousand employees) exceeded the corresponding level of 2019 (429 thousand employees).
- Lastly, revenues from car rentals in 2022 amounted to €185 million, down -29% in comparison with 2019.

## **1 Introduction**



Chart 1: International Tourist Arrivals 2022



International tourist arrivals worldwide in 2022 decreased by -37% relative to 2019, though in 2021 they were down -69%. More than 900 million tourists travelled internationally in 2022, double those in 2021, though still 37% fewer than in 2019. International tourism saw better-than-expected results in 2022 due to considerable latent demand and the lifting or relaxation of travel restrictions in a large number of countries.

International tourism recovered by 63% compared to pre-pandemic levels, with Europe and the Middle East leading the way. As the predominant destination in the world, Europe had 585 million arrivals in 2022 to reach 79% of the pre-pandemic level (-21% compared to 2019). The Middle East had the strongest increase amongst destinations in 2022, with arrivals coming to 83% of the pre-pandemic level (down -17% from 2019). Africa and America recovered to about 65% of their pre-pandemic visitor levels, while Asia and the Pacific came to just 23% due to stringent restrictions. By subregion, West Europe (87%) and the Caribbean (84%) came close to pre-pandemic levels. There was a strong recovery in tourist expenditures in 2022, resulting in an upturn in receipts to pre-pandemic levels at many destinations.

Based on the UNWTO scenarios for 2023, international tourist arrivals could be as high as 80% to 95% of pre-pandemic levels. Nevertheless, significant risks remain, particularly economic and geopolitical.

## **2 International Arrivals**

## 2.1 International airport arrivals

Table 1: International Airport Arrivals at Main Airports

2022	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	123.665	53.247				743	524	49				1						3		178.232
February	158.186	62.663				538	899								511			1		222.798
March	216.194	94.863	3.856	683		8.030	6.495	3.895	253	338	504	531	2.425	27	2.189					340.283
April	400.590	159.924	111.019	31.242		182.274	65.338	64.960	12.095	5.929	10.918	16.798	36.037		7.223	1.337	373	1.164	507	1.107.728
May	521.373	202.377	298.391	145.320	6.787	383.421	149.335	168.804	93.066	37.783	38.441	42.681	13.307	4.822	15.321	13.307	22.605	8.897	4.741	2.170.779
June	647.279	234.680	431.977	207.740	17.032	543.894	226.846	298.237	166.649	64.525	66.130	99.154	134.287	8.752	26.124	24.036	40.866	20.584	8.669	3.267.461
July	819.152	281.910	542.220	266.813	21.958	693.533	280.186	389.032	222.345	88.772	90.467	158.927	190.391	11.743	35.184	29.050	60.358	26.344	10.920	4.219.305
August	762.294	263.837	508.333	256.286	21.998	683.784	245.575	373.847	214.739	86.086	81.895	147.774	178.571	10.857	31.105	29.862	61.090	25.679	11.570	3.995.182
September	679.064	213.104	409.604	205.529	17.323	543.074	207.700	276.125	156.447	57.229	61.630	86.410	128.764	10.204	27.771	23.382	33.956	15.134	8.870	3.161.320
October	574.397	180.110	242.334	125.368	2.991	354.279	110.799	115.170	36.896	12.048	22.020	23.967	60.573	3.052	13.150	3.619	1.305	2.524	1.460	1.886.062
November	346.180	102.324	767	216		8.814	1.898	902	104	165	98	121	1.119		1.482		5	148		464.343
December	303.853	126.920				3.344	1.364											211		435.692
<b>Total</b>	<b>5.552.227</b>	<b>1.975.959</b>	<b>2.548.501</b>	<b>1.239.197</b>	<b>88.089</b>	<b>3.405.728</b>	<b>1.296.959</b>	<b>1.691.021</b>	<b>902.594</b>	<b>352.875</b>	<b>372.103</b>	<b>576.364</b>	<b>745.474</b>	<b>49.457</b>	<b>160.060</b>	<b>124.593</b>	<b>220.558</b>	<b>100.689</b>	<b>46.737</b>	<b>21.449.185</b>

2021	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	33.648	8.746				458														42.852
February	28.463	6.807				175														35.445
March	32.224	10.266	49			366	39	108											310	43.362
April	45.847	18.135	389			1.463	117	38					48					113	310	66.460
May	115.481	42.146	30.894	16.103	202	64.759	12.273	14.705	7.212	582	3.337	6.661	11.191	1.072	1.233	618	426	1.776	468	331.139
June	275.686	95.865	121.544	58.920	3.490	218.763	53.568	79.684	49.386	6.444	14.835	43.756	48.220	4.184	6.557	5.934	6.005	6.775	1.259	1.100.875
July	552.254	211.767	339.418	165.562	12.805	514.598	171.423	228.935	130.515	27.066	45.168	112.808	119.769	9.592	17.964	17.055	21.364	16.470	4.585	2.719.118
August	545.347	209.403	376.416	187.858	14.719	566.539	173.215	268.428	151.423	43.807	52.227	115.531	136.523	8.226	21.302	19.623	31.046	17.492	6.929	2.946.054
September	465.141	162.379	303.256	147.328	10.122	438.253	142.063	199.120	104.051	31.295	40.991	63.091	96.620	6.809	17.383	16.392	19.922	10.041	4.991	2.279.248
October	396.603	144.247	226.060	104.480	1.431	332.249	106.874	108.461	28.694	7.373	16.963	20.401	59.074	4.131	11.708	2.324	1.782	2.834	908	1.576.597
November	239.167	82.625	2.531	133		8.616	1.868	292	114			204	779		1.039					337.368
December	191.689	96.965				1.135									31					289.820
<b>Total</b>	<b>2.921.550</b>	<b>1.089.351</b>	<b>1.400.557</b>	<b>680.384</b>	<b>42.769</b>	<b>2.147.374</b>	<b>661.440</b>	<b>899.771</b>	<b>471.395</b>	<b>116.567</b>	<b>173.521</b>	<b>362.452</b>	<b>472.224</b>	<b>34.045</b>	<b>77.186</b>	<b>61.946</b>	<b>80.545</b>	<b>55.501</b>	<b>19.760</b>	<b>11.768.338</b>

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	299.917	146.869	3	4		3.471	1.436	145												451.845
<b>Total</b>	<b>6.412.593</b>	<b>2.341.743</b>	<b>2.343.299</b>	<b>1.178.287</b>	<b>99.085</b>	<b>3.302.223</b>	<b>1.141.434</b>	<b>1.457.420</b>	<b>856.538</b>	<b>330.329</b>	<b>300.698</b>	<b>474.081</b>	<b>519.999</b>	<b>84.454</b>	<b>153.364</b>	<b>137.153</b>	<b>181.904</b>	<b>122.892</b>	<b>58.818</b>	<b>21.496.314</b>

Δ2022/21	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total		
January	267,5%	508,8%				62,2%															315,9%	
February	455,8%	820,6%				207,4%															528,6%	
March	570,9%	824,1%	7769,4%			2094,0%	16553,8%	3506,5%													-100,0%	684,7%
April	773,8%	781,9%	28439,6%			12358,9%	55744,4%	170847,4%					74977,1%					930,1%	63,5%		1566,8%	
May	351,5%	380,2%	865,9%	802,4%	3259,9%	492,1%	1116,8%	1047,9%	1190,4%	6391,9%	1052,0%	540,8%	18,9%	349,8%	1142,6%	2053,2%	5206,3%	401,0%	913,0%		555,5%	
June	134,8%	144,8%	255,4%	252,6%	388,0%	148,6%	323,5%	274,3%	237,4%	901,3%	345,8%	126,6%	178,5%	109,2%	298,4%	305,1%	580,5%	203,8%	588,6%		196,8%	
July	48,3%	33,1%	59,7%	61,2%	71,5%	34,8%	63,4%	69,9%	70,4%	228,0%	100,3%	40,9%	59,0%	22,4%	95,9%	70,3%	182,5%	60,0%	138,2%		55,2%	
August	39,8%	26,0%	35,0%	36,4%	49,5%	20,7%	41,8%	39,3%	41,8%	96,5%	56,8%	27,9%	30,8%	32,0%	46,0%	52,2%	96,8%	46,8%	67,0%		35,6%	
September	46,0%	31,2%	35,1%	39,5%	71,1%	23,9%	46,2%	38,7%	50,4%	82,9%	50,4%	37,0%	33,3%	49,9%	59,8%	42,6%	70,4%	50,7%	77,7%		38,7%	
October	44,8%	24,9%	7,2%	20,0%	109,0%	6,6%	3,7%	6,2%	28,6%	63,4%	29,8%	17,5%	2,5%	-26,1%	12,3%	55,7%	-26,8%	-10,9%	60,8%		19,6%	
November	44,7%	23,8%	-69,7%	62,4%		2,3%	1,6%	208,9%	-8,8%			-40,7%	43,6%		42,6%						37,6%	
December	58,5%	30,9%				194,6%								-100,0%							50,3%	
<b>Total</b>	<b>90,0%</b>	<b>81,4%</b>	<b>82,0%</b>	<b>82,1%</b>	<b>106,0%</b>	<b>58,6%</b>	<b>96,1%</b>	<b>87,9%</b>	<b>91,5%</b>	<b>202,7%</b>	<b>114,4%</b>	<b>59,0%</b>	<b>57,9%</b>	<b>45,3%</b>	<b>107,4%</b>	<b>101,1%</b>	<b>173,8%</b>	<b>81,4%</b>	<b>136,5%</b>		<b>82,3%</b>	

Δ2022/19	Athens	Thessaloniki	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Araxos	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total	
January	-54,5%	-46,8%	-100,0%			-57,2%	-64,2%						-100,0%					-99,7%	-100,0%		-52,6%
February	-37,1%	-36,3%				-91,8%	-40,0%						-100,0%		106,0%						-37,8%
March	-39,3%	-23,2%	4002,1%	306,5%		-21,5%	222,0%	666,7%	68,7%		103,2%		248,9%		19,4%						-31,4%
April	-21,6%	-15,8%	8,1%	-1,9%	-100,0%	-1,8%	-8,1%	3,6%	14,8%	-22,0%	145,7%	-7,6%	33,8%	-100,0%	31,2%	7,2%	578,2%	28,5%	-38,2%		-10,1%
May	-12,1%	-10,6%	4,6%	-5,7%	-18,7%	-4,7%	-2,1%	-4,3%	-12,4%	-7,9%	21,3%	-2,7%	-77,8%	-39,7%	-9,2%	-7,6%	5,4%	-35,6%	-28,0%		-8,1%
June	-7,4%	-15,1%	5,3%	0,0%	-15,6%	0,1%	11,7%	13,3%	3,1%	2,7%	12,3%	20,3%	47,0%	-53,8%	-6,3%	-9,8%	13,9%	-16,6%	-24,9%		1,3%
July	-5,3%	-10,4%	13,3%	7,9%	-9,8%	7,2%	25,1%	22,5%	9,0%	15,6%	20,3%	32,6%	65,8%	-41,8%	19,0%	-10,8%	25,1%	-6,9%	-24,1%		8,7%
August	-13,0%	-10,9%	6,5%	3,1%	-16,2%	5,0%	19,6%	20,7%	7,2%	11,0%	24,5%	24,2%	65,5%	-39,8%	-4,8%	-4,6%	23,7%	-10,7%	-19,1%		4,2%
September	-7,5%	-15,3%	5,4%	7,2%	-1,1%	1,3%	14,7%	16,4%	6,6%	7,8%	16,1%	27,2%	61,2%	-30,4%	-1,3%	-11,2%	31,3%	-23,7%	-14,4%		3,2%
October	1,9%	-9,3%	21,1%	29,6%	63,7%	18,5%	16,0%	28,6%	37,3%	5,8%	94,0%	4,7%	59,3%	-28,7%	37,2%	-22,4%	32,6%	-54,3%	80,7%		12,2%
November	-11,4%	-14,2%	105,6%	213,0%		-45,5%	-20,2%	94,0%			276,9%		163,9%		39,5%						-12,6%
December	1,3%	-13,6%	-100,0%	-100,0%		-3,7%	-5,0%	-100,0%													-3,6%
<b>Total</b>	<b>-13,4%</b>	<b>-15,6%</b>	<b>8,8%</b>	<b>5,2%</b>	<b>-11,1%</b>	<b>3,1%</b>	<b>13,6%</b>	<b>16,0%</b>	<b>5,4%</b>	<b>6,8%</b>	<b>23,7%</b>	<b>21,6%</b>	<b>43,4%</b>	<b>-41,4%</b>	<b>4,4%</b>	<b>-9,2%</b>	<b>21,2%</b>	<b>-18,1%</b>	<b>-20,5%</b>		<b>-0,2%</b>

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

See Appendix

In the period January-December 2022, 21.4 million international airport arrivals were recorded, showing a decrease of -0.2%/-47 thousand arrivals compared to the period January-December 2019, when 21.5 million international airport arrivals were recorded. (Table 1).

In the first quarter of 2022, international airport arrivals showed a significant decline. Specifically, 178 thousand arrivals were recorded in January, for a decrease of -52.6%/-198 thousand compared to 2019; 223 thousand arrivals were recorded in February, a decrease of -37.8%/-136 thousand; and 340 thousand were recorded in March, a decrease of -31.4%/-155 thousand arrivals.

The decline slowed at the start of the second quarter, as the decrease in April amounted to -10.1%/-125 thousand and 1.1 million international airport arrivals were recorded. A similar picture emerged in May, when 2.2 million international airport arrivals were recorded and the decrease came to -8.1%/-191 thousand. June recorded an increase for the first time in 2022 (+1.3%/+42 thousand), with 3.3 million international airport arrivals recorded.

The third quarter began with an increase, coming to +8.7%/+337 thousand in July, with 4.2 million international arrivals recorded. In August, 4.0 million international airport arrivals were recorded, with the increase amounting to +4.2%/+160 thousand arrivals. In September, the rate of recovery slowed down to +3.2%/+98 thousand, while 3.2 million international airport arrivals were recorded.

The fourth quarter began with the highest increase recorded in 2022 (+12.2%/+204 thousand), as October saw 1.9 million international airport arrivals. In November, the recovery rate slowed down to -12.6%/-67 thousand and 464 thousand international airport arrivals were recorded. Finally, in December, the recovery rate came to -3.6%/-16 thousand, while 436 thousand international airport arrivals were recorded.

Over the period January-December 2022, the majority of airports saw an increase, compared to the same period in 2019. Conversely, 5.6 million international airport arrivals were recorded at Athens International Airport, showing a decrease of -13.4%/-860 thousand. A similar picture was presented by Thessaloniki Airport, where 2 million international airport arrivals were recorded, showing a decrease of -15.6%/-366 thousand.

At Heraklion Airport, 3.4 million international airport arrivals were recorded, for an increase of +3.1%/+104 thousand, while Chania Airport showed an increase of +13.6%/+156 thousand, with 1.3 million recorded international airport arrivals.

Rhodes Airport recorded 2.5 million international airport arrivals, showing an increase of +8.8%/+205 thousand. At Kos Airport, an increase of +5.2%/+61 thousand was recorded, with 1.2 million international airport arrivals, while Karpathos Airport had 88 thousand international airport arrivals, for a decrease of -11.1%/-11 thousand.

Corfu Airport had an increase of +16.0%/+234 thousand, while international airport arrivals came to 1.7 million. At Zakyntos Airport, 903 thousand international airport arrivals were recorded, presenting an increase of +5.4%/+46 thousand. At the airports of Aktio and Kefalonia, 372 thousand and 353 thousand passengers were recorded, showing an increase of +23.7%/+71 thousand and 6.8%/+23 thousand, respectively.

At the airports of Santorini and Mykonos, 745 thousand and 576 thousand passengers were recorded, showing an increase of +43.4%/+225 thousand and +21.6%/+102 thousand, respectively.

Conversely, the airport at Araxos recorded just 49 thousand arrivals, showing a decrease of -41.4%/-35 thousand, while Kalamata Airport recorded 160 thousand arrivals, showing an increase of +4.4%/+7 thousand.

In Samos, a decrease of -9.2%/-13 thousand was recorded, and in Kavala, -18.1%/-22 thousand, while international airport arrivals came to 125 thousand and 101 thousand, respectively. At Skiathos Airport, 221 thousand arrivals were recorded, showing a decrease of +21.2%/+39 thousand.

Finally, the fewest international airport arrivals for 2022 (only 47 thousand) were recorded at Lesvos Airport, which showed a decrease (-20.5%/-12 thousand arrivals).

Table 2: International Airport Arrivals by Regional Unit

Geographical unit	Regional airports					Dodecanese					Cyclades				
	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19
January	54.567	9.204	104.483	492,9%	-47,8%			48		-100,0%	1		36		-97,2%
February	64.612	6.982	106.810	825,4%	-39,5%								118		-100,0%
March	124.089	11.138	139.435	1014,1%	-11,0%	4.539	49	262	9163,3%	1632,4%	2.956		695		325,3%
April	707.138	20.613	721.163	3330,5%	-1,9%	142.261	389	135.135	36471,0%	5,3%	52.835	48	45.116	109972,9%	17,1%
May	1.649.406	215.658	1.768.877	664,8%	-6,8%	450.498	47.199	447.629	854,5%	0,6%	55.988	17.852	103.708	213,6%	-46,0%
June	2.620.182	825.189	2.526.576	217,5%	3,7%	656.749	183.954	638.079	257,0%	2,9%	233.441	91.976	173.729	153,8%	34,4%
July	3.400.153	2.166.864	3.017.127	56,9%	12,7%	830.991	517.785	750.241	60,5%	10,8%	349.318	232.577	234.731	50,2%	48,8%
August	3.232.888	2.400.707	2.959.511	34,7%	9,2%	786.617	578.993	752.321	35,9%	4,6%	326.345	252.054	226.835	29,5%	43,9%
September	2.482.256	1.814.107	2.329.699	36,8%	6,5%	632.456	460.706	597.813	37,3%	5,8%	215.174	159.711	147.768	34,7%	45,6%
October	1.311.665	1.179.994	1.117.899	11,2%	17,3%	370.693	331.971	298.694	11,7%	24,1%	84.540	79.475	60.920	6,4%	38,8%
November	118.163	98.201	140.213	20,3%	-15,7%	983	2.664	442	-63,1%	122,4%	1.240	983	424	26,1%	192,5%
December	131.839	98.131	151.928	34,4%	-13,2%			7		-100,0%					
<b>ytd</b>	<b>#####</b>	<b>8.846.788</b>	<b>#####</b>	<b>79,7%</b>	<b>5,4%</b>	<b>3.875.787</b>	<b>2.123.710</b>	<b>3.620.671</b>	<b>82,5%</b>	<b>7,0%</b>	<b>1.321.838</b>	<b>834.676</b>	<b>994.080</b>	<b>58,4%</b>	<b>33,0%</b>

Geographical unit	Crete					Ionian Islands					Peloponnese				
	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19
January	1.267	458	3.203	176,6%	-60,4%	49									
February	1.437	175	8.085	721,1%	-82,2%						511		248		106,0%
March	14.525	405	12.245	3486,4%	18,6%	4.990	108	906	4520,4%	450,8%	2.216		1.833		20,9%
April	247.612	1.580	256.745	15571,6%	-3,6%	93.902	38	85.278	247010,5%	10,1%	7.223		5.858		23,3%
May	532.756	77.032	554.710	591,6%	-4,0%	338.094	25.836	355.252	1208,6%	-4,8%	20.143	2.305	24.868	774%	-19,0%
June	770.740	272.331	746.271	183,0%	3,3%	595.541	150.349	546.635	296,1%	8,9%	34.876	10.741	46.835	225%	-25,5%
July	973.719	686.021	870.762	41,9%	11,8%	790.616	431.684	673.621	83,1%	17,4%	46.927	27.556	49.746	70%	-5,7%
August	929.359	739.754	856.378	25,6%	8,5%	756.567	515.885	653.313	46,7%	15,8%	41.962	29.528	50.705	42%	-17,2%
September	750.774	580.316	717.169	29,4%	4,7%	551.431	375.457	490.152	46,9%	12,5%	37.975	24.192	42.794	57%	-11,3%
October	465.078	439.123	394.626	5,9%	17,9%	186.134	161.491	139.192	15,3%	33,7%	16.202	15.839	13.869	2%	16,8%
November	10.712	10.484	18.556	2,2%	-42,3%	1.269	406	491	212,6%	158,5%	1.482	1.039	1.062	43%	39,5%
December	4.708	1.135	4.907	314,8%	-4,1%			145		-100,0%			31		-100,0%
<b>ytd</b>	<b>4.702.687</b>	<b>2.808.814</b>	<b>4.443.657</b>	<b>67,4%</b>	<b>5,8%</b>	<b>3.318.593</b>	<b>1.661.254</b>	<b>2.944.985</b>	<b>99,8%</b>	<b>12,7%</b>	<b>209.517</b>	<b>111.231</b>	<b>237.818</b>	<b>88%</b>	<b>-11,9%</b>

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

See Appendix

International airport arrivals at regional airports amounted to 15.9 million and an increase of 5.4%/+813 thousand, as increases were recorded at most regional units. In terms of absolute differences, the greatest increase was recorded for the Ionian Islands (+12.7%/+374 thousand), as international airport arrivals came to 3.3 million. This was followed by the Cyclades, where airport arrivals amounted to 1.3

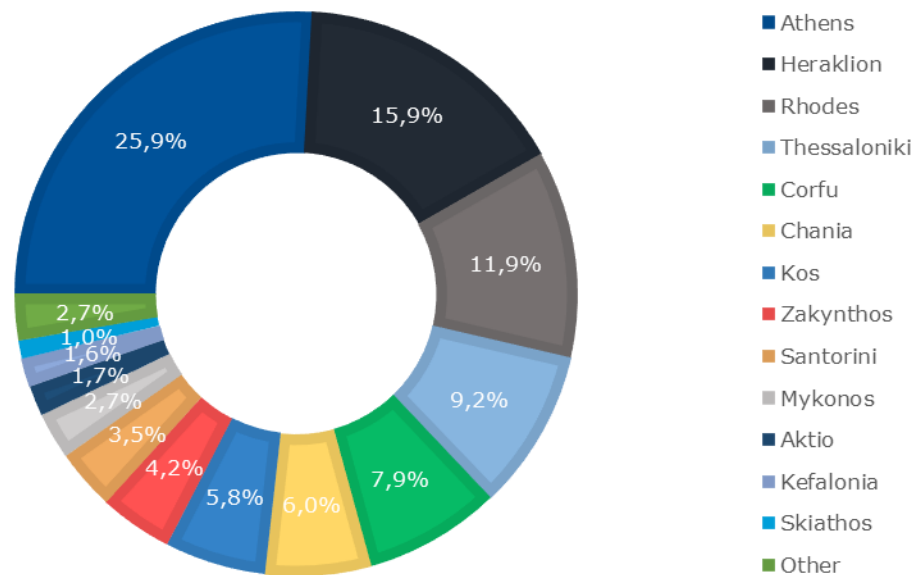
million, for an increase of +33.0%/+328 thousand. An increase of +5.8%/+259 thousand was recorded in the regional unit of Crete, and 4.7 million airport arrivals were recorded. In the Dodecanese, airport arrivals came to 3.9 million for an increase of +7.0%/+255 thousand.

Conversely, Peloponnese was the only regional unit to record a decrease (-11.9%/-28 thousand passengers) with airport arrivals amounting to 210 thousand for 2022 (Table 2).

The international airport arrivals of the top 5 airports make up 70.7% of the total (Chart 2). More specifically, Athens welcomed 25.9% of inbound international airport arrivals in 2022. Heraklion was in second place with 15.9%, followed by Rhodes in third place (with 11.9%) and Thessaloniki in fourth place (with 9.2%). These were followed – with a lower percentage – by Corfu with 7.9%.

In sixth place was Chania with 6.0%, in seventh place was Kos with 5.8% and in eighth place was Zakynthos with 4.2%. The top 10 was rounded off with Santorini with 3.5% and Mykonos with 2.7%. The arrivals of the top 10 airports account for 92.9% of the total international airport arrivals in 2022. Lastly, the market share for Aktio came to 1.7%, for Kefalonia to 1.6% and for Skiathos to 1.0%.

Chart2: Airport Market Share





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

## 2.2 International road arrivals

Table 3: Road Arrivals

2022	Nymfaia	Niki	Crystallogigys	Konstanti	Ormenio	Kyprinos	Kastanies	Kipoi	Doirani	Evzonoï	Kakavia	Mertzani	Exochi	romachona	Sagiada	Total
January	3.642	2.298	40.593		8.088		936	11.720	3.442	25.864	37.630	867	4.026	21.166	9.568	169.840
February	5.837	5.542	28.558		9.879		1.765	14.107	35.589	7.940	24.609	762	5.960	25.376	9.047	174.971
March	7.997	6.949	37.763		14.974		1.898	20.386	6.041	42.732	31.798	1.236	10.034	44.222	11.940	237.970
April	11.465	10.882	48.188	2.477	18.987	987	2.885	7.428	7.665	78.335	43.430	1.751	11.930	56.434	16.720	319.564
May	17.845	23.854	61.451	5.807	34.503	5.353	4.843	39.624	40.264	182.931	38.841	1.710	17.061	79.446	15.635	569.168
June	76.854	33.035	53.726	8.355	49.320	6.422	4.663	45.587	24.058	338.006	41.779	1.501	26.601	175.629	19.051	904.587
July	150.844	50.853	66.143	14.087	77.021	8.209	8.746	79.719	59.060	538.413	60.211	2.530	41.779	323.150	39.556	1.520.321
August	120.479	55.156	99.573	14.905	132.135	8.021	50.382	175.713	60.003	454.907	97.041	4.644	39.084	411.688	51.811	1.775.542
September	45.420	37.355	73.907	8.231	69.080	6.984	16.760	86.136	20.075	242.453	56.972	3.870	31.725	224.274	31.042	954.284
October	13.299	34.276	59.067	4.643	39.713	41.886	8.790	86.136	12.941	97.131	44.828	1.389	12.456	58.394	18.673	533.622
November	11.042	18.998	53.901	3.332	14.596	47.454	7.610	48.612	8.984	67.973	44.560	1.676	14.487	42.999	11.430	397.654
December	11.165	30.532	47.082	3.960	34.586	5.777	7.610	48.963	9.616	80.075	44.336	2.098	24.090	78.630	16.342	444.862
<b>Total</b>	<b>475.889</b>	<b>309.730</b>	<b>669.952</b>	<b>65.797</b>	<b>502.882</b>	<b>131.093</b>	<b>116.888</b>	<b>664.131</b>	<b>287.738</b>	<b>2.156.760</b>	<b>566.035</b>	<b>24.034</b>	<b>239.233</b>	<b>1.541.408</b>	<b>250.815</b>	<b>8.002.385</b>

2021	Nymfaia	Niki	Crystallogigys	Konstanti	Ormenio	Kyprinos	Kastanies	Kipoi	Doirani	Evzonoï	Kakavia	Mertzani	Exochi	romachona	Sagiada	Total
January	921	103			6.236			6.433		24.234	12.446		1.398	15.512		67.283
February	1.051	153			7.209			6.620		24.355	9.305		1.938	15.554		66.185
March	1.242	158			8.247			8.260		18.413	9.127		2.725	20.466		68.638
April	2.617	158			6.948			6.936		20.996	9.605		2.752	28.168		78.180
May	6.473	187	1.789		11.139			5.727		56.075	4.227		2.713	53.434		141.764
June	34.479	231	6.658		17.092			7.428		172.046	17.125		3.477	145.451	4.666	408.653
July	57.912	15.101	38.208		25.476		512	11.628	23.269	331.667	38.776	647	16.243	350.680	11.939	922.058
August	48.791	19.764	65.182		36.309		17.491	53.750	26.690	302.201	66.812	3.045	18.398	365.608	27.755	1.051.796
September	24.054	10.768	41.080		21.415		4.475	26.778	11.824	144.362	35.749	1.441	13.459	162.520	17.144	515.069
October	8.691	33.946	7.679		13.086		4.603	21.125	5.768	49.016	28.945	1.151	8.255	54.683	13.178	250.126
November	6.529	6.464	37.977		13.165		3.936	17.990	5.019	41.244	28.686	589	7.008	28.372	10.789	207.768
December	5.177	5.937	29.368		10.109		2.675	15.312	4.049	36.569	27.208	932	6.280	27.398	9.121	180.135
<b>Total</b>	<b>197.937</b>	<b>92.970</b>	<b>227.941</b>		<b>176.431</b>		<b>33.692</b>	<b>187.987</b>	<b>76.619</b>	<b>1.221.178</b>	<b>288.011</b>	<b>7.805</b>	<b>84.646</b>	<b>1.267.846</b>	<b>94.592</b>	<b>3.957.655</b>

2019	Nymfaia	Niki	Crystallogigys	Konstanti	Ormenio	Kyprinos	Kastanies	Kipoi	Doirani	Evzonoï	Kakavia	Mertzani	Exochi	romachona	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
<b>Total</b>	<b>1.643.250</b>	<b>402.500</b>	<b>847.980</b>	<b>86.867</b>	<b>272.577</b>	<b>81.807</b>	<b>256.688</b>	<b>829.782</b>	<b>409.771</b>	<b>2.437.849</b>	<b>782.141</b>	<b>27.816</b>	<b>231.701</b>	<b>3.756.689</b>	<b>275.458</b>	<b>12.342.876</b>

<b>A2022/21</b>	<b>Nymfaia</b>	<b>Niki</b>	<b>Crystallopigys</b>	<b>Konstanti</b>	<b>Ormenio</b>	<b>Kyprinos</b>	<b>Kastanies</b>	<b>Kipoi</b>	<b>Doirani</b>	<b>Evzonoï</b>	<b>Kakavia</b>	<b>Mertzani</b>	<b>Exochi</b>	<b>romachona</b>	<b>Sagiada</b>	<b>Total</b>
January	295,4%	2131,1%			29,7%			82,2%		6,7%	202,3%		188,0%	36,4%		152,4%
February	455,4%	3522,2%			37,0%			113,1%		-67,4%	164,5%		207,5%	63,1%		164,4%
March	543,9%	4298,1%			81,6%			146,8%		132,1%	248,4%		268,2%	116,1%		246,7%
April	338,1%	6787,3%			173,3%			7,1%		273,1%	352,2%		333,5%	100,3%		308,8%
May	175,7%	12656,1%	3334,9%		209,7%			591,9%		226,2%	818,9%		528,9%	48,7%		301,5%
June	122,9%	14200,9%	706,9%		188,6%			513,7%		96,5%	144,0%		665,1%	20,7%	308,3%	121,4%
July	160,5%	236,8%	73,1%		202,3%		1608,2%	585,6%	153,8%	62,3%	55,3%	291,0%	157,2%	-7,9%	231,3%	64,9%
August	146,9%	179,1%	52,8%		263,9%		188,0%	226,9%	124,8%	50,5%	45,2%	52,5%	112,4%	12,6%	86,7%	68,8%
September	88,8%	246,9%	79,9%		222,6%		274,5%	221,7%	69,8%	67,9%	59,4%	168,6%	135,7%	38,0%	81,1%	85,3%
October	53,0%	1,0%	669,2%		203,5%		91,0%	307,7%	124,4%	98,2%	54,9%	20,7%	50,9%	6,8%	41,7%	113,3%
November	69,1%	193,9%	41,9%		10,9%		93,3%	170,2%	79,0%	64,8%	55,3%	184,6%	106,7%	51,6%	5,9%	91,4%
December	115,7%	414,3%	60,3%		242,1%		184,5%	219,8%	137,5%	119,0%	63,0%	125,1%	283,6%	187,0%	79,2%	147,0%
<b>Total</b>	<b>140,4%</b>	<b>233,2%</b>	<b>193,9%</b>		<b>185,0%</b>		<b>246,9%</b>	<b>253,3%</b>	<b>275,5%</b>	<b>76,6%</b>	<b>96,5%</b>	<b>207,9%</b>	<b>182,6%</b>	<b>21,6%</b>	<b>165,2%</b>	<b>102,2%</b>

<b>A2022/19</b>	<b>Nymfaia</b>	<b>Niki</b>	<b>Crystallopigys</b>	<b>Konstanti</b>	<b>Ormenio</b>	<b>Kyprinos</b>	<b>Kastanies</b>	<b>Kipoi</b>	<b>Doirani</b>	<b>Evzonoï</b>	<b>Kakavia</b>	<b>Mertzani</b>	<b>Exochi</b>	<b>romachona</b>	<b>Sagiada</b>	<b>Total</b>
January	-94,8%	-86,8%	-40,2%	-100,0%	-43,7%	-100,0%	-91,0%	-65,0%	-49,4%	-52,0%	-48,7%	-18,5%	-58,7%	-73,0%	-43,4%	-63,2%
February	-91,9%	-69,8%	-35,6%	-100,0%	-29,6%	-100,0%	-83,5%	-48,7%	17,2%	-92,9%	-33,4%	-36,3%	-45,6%	-54,2%	-20,4%	-61,2%
March	-92,0%	-69,3%	975,3%	-100,0%	-22,3%	-100,0%	-88,1%	-55,0%	-46,1%	-48,7%	-36,9%	-32,9%	-24,4%	-29,1%	-12,7%	-47,7%
April	-89,7%	-53,6%	-29,5%	-52,6%	2,2%	-87,1%	-82,5%	-87,1%	-36,7%	-31,9%	-25,9%	-16,0%	-22,2%	-58,0%	-0,1%	-51,8%
May	-83,0%	1,8%	-27,9%	-6,5%	72,3%	-32,1%	-68,0%	-17,2%	207,1%	18,0%	-25,4%	-30,9%	14,5%	-29,7%	-19,5%	-16,3%
June	-64,3%	-24,8%	-25,2%	-33,4%	59,3%	-36,5%	-75,6%	-41,1%	-29,6%	-16,8%	-26,4%	-35,2%	10,5%	-42,8%	-14,5%	-32,2%
July	-46,9%	-10,7%	-22,8%	8,0%	71,9%	-9,1%	-62,9%	-12,5%	-62,1%	7,8%	-23,6%	-11,4%	33,6%	-53,2%	0,9%	-27,8%
August	-62,6%	-22,5%	-12,3%	-7,2%	319,6%	-3,0%	-23,6%	-15,0%	-14,4%	-5,1%	-19,9%	-6,2%	38,0%	-54,1%	-2,1%	-28,6%
September	-73,4%	-11,0%	-20,0%	-23,9%	180,0%	3,4%	-37,0%	-6,2%	-26,0%	-16,5%	-19,6%	30,4%	6,1%	-68,0%	9,8%	-40,9%
October	-80,8%	0,1%	-24,1%	6,5%	121,6%	646,9%	-48,6%	46,4%	-53,7%	-1,2%	-29,6%	-46,4%	-41,3%	-84,2%	8,8%	-39,8%
November	-80,9%	-5,6%	-29,5%	-11,6%	-18,3%	813,5%	-55,7%	5,1%	-12,3%	2,0%	-26,4%	-25,6%	2,3%	-78,3%	-36,9%	-35,3%
December	-83,0%	6,0%	-22,8%	-3,7%	86,1%	1,9%	-58,9%	6,2%	-11,7%	0,7%	-24,9%	72,1%	29,6%	-48,1%	-15,8%	-24,4%
<b>Total</b>	<b>-71,0%</b>	<b>-23,0%</b>	<b>-21,0%</b>	<b>-24,3%</b>	<b>84,5%</b>	<b>60,2%</b>	<b>-54,5%</b>	<b>-20,0%</b>	<b>-29,8%</b>	<b>-11,5%</b>	<b>-27,6%</b>	<b>-13,6%</b>	<b>3,3%</b>	<b>-59,0%</b>	<b>-8,9%</b>	<b>-35,2%</b>

Source: Border checkpoints - Processing: INSETE Intelligence  
See Appendix

In the period January-December 2022, 8.0 million international road arrivals were recorded, compared to 12.3 million in the period January-December 2019, showing a decrease of -35.2%/-4.3 million. (Table 3).

In the first quarter of 2022, road arrivals showed a significant decline. Specifically, only 170 thousand arrivals were recorded in January (showing a decrease of -63.2%/-292 thousand), 175 thousand arrivals were recorded in February (down -61.2%/-276 thousand) and 238 thousand were recorded in March (down -47.7%/-217 thousand arrivals).

The second quarter began with a decrease in April of -51.8%/-343 thousand and only 320 thousand road arrivals recorded. The recovery rate of road arrivals showed – for the first time in 2022 – a significant acceleration in May (-16.3%/-111 thousand), with road arrivals coming to 569 thousand. In June, though, the rate of recovery slowed to -32.2%/-429 thousand, with 905 thousand road arrivals.

In July, more than 1 million road arrivals were recorded for the first time in 2022, with road arrivals coming to 1.5 million and the recovery rate at 27.8%/-585 thousand. In August, 1.8 million road arrivals were recorded, even though the recovery rate slowed by -28.6%/-713 thousand arrivals. In September, the recovery rate slowed down by -40.9%/-661 thousand and 954 thousand road arrivals were recorded.

The fourth quarter started with an upturn in the recovery rate by -39.8%/-352 thousand, while 534 thousand arrivals were recorded in October. In November, road arrivals came to 398 thousand, recording a decrease of -35.3%/-217 thousand road arrivals. Finally, 445 thousand arrivals were recorded in December, showing a decrease of -24.4%/-146 thousand.

Over the period January-December 2022, only 3 border checkpoints saw an increase, compared to 2019. The border checkpoint at Ormenio recorded the largest increase of +84.5%/+230 thousand, with 503 thousand arrivals. At the border checkpoint at Kyprinos, the increase came to +60.2%/+49 thousand, with 131 thousand arrivals. Finally, the increase at the Exochi border checkpoint was +3.3%/+8 thousand, with 239 thousand arrivals.

The largest decrease in absolute terms was recorded in Promachonas (-59.0%/-2.2 million/), with road arrivals coming to 1.5 million. This was followed by the Nymphaea border checkpoint with the largest percentage decrease of -71.0%/-1.2 million, with 476 thousand road arrivals. Finally, a significant decrease of -11.5%/-281 thousand was recorded at the Evzoni border checkpoint, with 2.2 million road arrivals.

In the period January-December 2022 (*Table 4*), a decrease was recorded with regard to all neighbouring countries of origin, as compared to 2019. Specifically, the largest decrease both in absolute terms and percentage change was recorded in arrivals from Bulgaria (-51.3%/-3.1 million), with 3.0 million road arrivals. From North Macedonia, 2.8 million arrivals were recorded, showing a decrease of -15.3%/-496 thousand.

The decrease from Albania came to -21.9%/-423 thousand with 1.5 million recorded road arrivals. Lastly, there were 781 thousand road arrivals from Turkey, with the decrease amounting to -28.1%/-305 thousand.

Table 4: Road Arrivals by Country of Origin

Countries	Albania					Bulgaria				
	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19
January	88.658	12.446	159.119	612,3%	-44,3%	36.922	24.067	180.569	53,4%	-79,6%
February	62.976	9.305	93.840	576,8%	-32,9%	47.052	25.752	159.402	82,7%	-70,5%
March	82.737	9.127	69.412	806,5%	19,2%	77.227	32.680	207.156	136,3%	-62,7%
April	110.089	9.605	145.753	1046,2%	-24,5%	102.280	40.485	292.412	152,6%	-65,0%
May	117.637	6.016	159.123	1855,4%	-26,1%	160.015	73.759	266.702	116,9%	-40,0%
June	116.057	28.449	153.214	307,9%	-24,3%	343.181	200.499	600.004	71,2%	-42,8%
July	168.440	89.570	206.523	88,1%	-18,4%	615.090	450.311	1.072.461	36,6%	-42,6%
August	253.069	162.794	292.610	55,5%	-13,5%	726.312	469.106	1.302.290	54,8%	-44,2%
September	165.791	95.414	194.549	73,8%	-14,8%	385.714	221.448	943.256	74,2%	-59,1%
October	123.957	50.953	161.269	143,3%	-23,1%	170.391	84.715	487.983	101,1%	-65,1%
November	111.567	78.041	157.383	43,0%	-29,1%	133.910	55.074	296.658	143,1%	-54,9%
December	109.858	66.629	140.600	64,9%	-21,9%	158.208	48.964	263.998	223,1%	-40,1%
<b>Total</b>	<b>1.510.836</b>	<b>618.349</b>	<b>1.933.395</b>	<b>144,3%</b>	<b>-21,9%</b>	<b>2.956.302</b>	<b>1.726.860</b>	<b>6.072.891</b>	<b>71,2%</b>	<b>-51,3%</b>

Countries	North Macedonia					Turkey				
	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19
January	31.604	24.337	78.102	29,9%	-59,5%	12.656	6.433	43.795	96,7%	-71,1%
February	49.071	24.508	159.825	100,2%	-69,3%	15.872	6.620	38.214	139,8%	-58,5%
March	55.722	18.571	117.174	200,0%	-52,4%	22.284	8.260	61.257	169,8%	-63,6%
April	96.882	21.154	150.655	358,0%	-35,7%	10.313	6.936	73.899	48,7%	-86,0%
May	247.049	56.262	191.554	339,1%	29,0%	44.467	5.727	62.988	676,4%	-29,4%
June	395.099	172.277	484.169	129,3%	-18,4%	50.250	7.428	96.570	576,5%	-48,0%
July	648.326	370.037	711.931	75,2%	-8,9%	88.465	12.140	114.667	628,7%	-22,9%
August	570.066	348.655	620.516	63,5%	-8,1%	226.095	71.241	272.655	217,4%	-17,1%
September	299.883	166.954	359.485	79,6%	-16,6%	102.896	31.253	118.389	229,2%	-13,1%
October	144.348	88.730	160.515	62,7%	-10,1%	94.926	25.728	75.942	269,0%	25,0%
November	95.955	52.727	96.989	82,0%	-1,1%	56.222	21.926	63.445	156,4%	-11,4%
December	120.223	46.555	119.205	158,2%	0,9%	56.573	17.987	64.649	214,5%	-12,5%
<b>Total</b>	<b>2.754.228</b>	<b>1.390.767</b>	<b>3.250.120</b>	<b>98,0%</b>	<b>-15,3%</b>	<b>781.019</b>	<b>221.679</b>	<b>1.086.470</b>	<b>252,3%</b>	<b>-28,1%</b>

Source: Border checkpoints - Processing: INSETE Intelligence

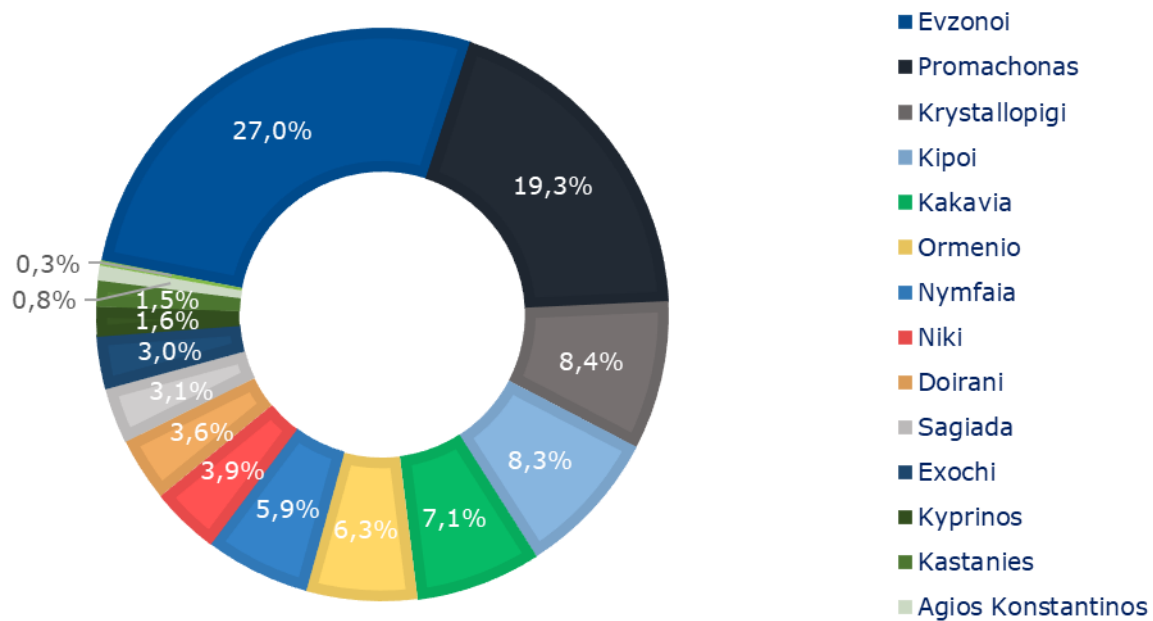
[See Appendix](#)

The international road arrivals of the top 2 border checkpoints make up 46.2% of the total. (Chart 3). Specifically, the Evzoni border checkpoint received 27.0% of inbound road arrivals in 2022 and the Promachonas checkpoint 19.3%. In third place was the Krystallopigi checkpoint with 8.4% and Kipoi was fourth with 8.3%.

These were followed – with lower percentages – by Kakavia with 7.1% and Ormenio with 6.3%. In seventh place was Nymphaea with 5.9%, in eighth place was Niki with 3.9% and in ninth place was Doirani with 3.6%. The Sagiadia and Exochi border checkpoints followed with 3.1% and 3.0%, respectively. The border checkpoint of Kyprinos followed with 1.6% and that of Kastanies with 1.5%.

The border checkpoints of Agios Konstantinos (0.8%) and Mertzani (0.3%) ranked last.

Chart3: Border Checkpoint Market Share



Source: Border Checkpoints - Processing: INSETE Intelligence

## 2.3 Maritime flows

### 2.3.1 The Adriatic<sup>1</sup>

It is estimated that, in the Adriatic market, visitor flows decreased by -19% in 2022 compared to 2019, while the estimate for the number of passengers comes to 1.2 million compared to 1.5 million in 2019. (Table 5). More specifically, 132 thousand passengers were recorded in the first quarter, showing a -3% decrease compared to 2019, while in the second quarter the decrease in passengers came to -22%, with 254 thousand passengers being recorded. In the third quarter – the high season – the number of passengers was estimated at 622 thousand compared to 841 thousand in 2019, with the decrease estimated at -26%. The passengers of the third quarter made up 51% of total arrivals in 2022. Finally, numbers for the fourth quarter were estimated to be at 2019 levels and the number of passengers at 202 thousand.

Table 5: Maritime Flows from Adriatic

Quarter	Passengers			% Change	
	2022	2021	2019	2022-2021	2022-2019
Q1	131.900	58.000	135.852	127%	-3%
Q2	253.800	114.000	323.384	123%	-22%
Q3	621.836	650.000	840.728	-4%	-26%
Q4	202.200	158.000	202.260	28%	0%
<b>Total</b>	<b>1.209.736</b>	<b>980.000</b>	<b>1.502.224</b>	<b>23%</b>	<b>-19%</b>

Source: SEEN – Processing: INSETE Intelligence

<sup>1</sup> The data concerning 2022 are estimates and will be updated in the course of the year

### 2.3.2 Cruise Travel<sup>2</sup>

In 2022, total cruise ship arrivals exceeded those of 2019, the pre-pandemic reference year. Specifically, ship arrivals are estimated to total 4,775, compared to 3,979 arrivals in 2019, for an increase of +20%. By contrast, estimated passengers come to 4.6 million visitor arrivals, compared to 5.5 million arrivals in 2019, for a decrease in visitor arrivals of -17%.

Table 6: Top-10 Cruise Ship Ports based on Passenger Arrivals

Ports/Arrivals	2022		2021		2019		%Change			
	Cruise ships	Passengers	Cruise ships	Passengers	Cruise ships	Passengers	Cruise ships 2022-2021	Passengers 2022-2021	Cruise ships 2022-2019	Passengers 2022-2019
Piraeus <sup>2</sup>	672	831.720	379	303.665	622	1.098.091	77%	174%	8%	-24%
Santorini	686	826.602	191	104.074	592	980.771	259%	694%	16%	-16%
Mykonos	608	685.918	252	201.821	550	787.490	141%	240%	11%	-13%
Corfu	392	527.609	200	234.699	420	767.673	96%	125%	-7%	-31%
Rhodes	381	370.343	195	130.516	258	308.194	95%	184%	48%	20%
Heraklion	227	304.257	118	119.930	204	307.043	92%	154%	11%	-1%
Katakolo	198	250.793	126	123.509	199	413.716	57%	103%	-1%	-39%
Hania	121	179.681	76	45.619	132	265.956	59%	294%	-8%	-32%
Kefalonia / Ithaca	132	145.373	33	28.291	133	259.261	300%	414%	-1%	-44%
Patmos	214	98.530	81	21.804	156	112.721	164%	352%	37%	-13%
Other	1.144	360.128	413	104.387	713	251.468	177%	245%	60%	43%
<b>Total<sup>2</sup></b>	<b>4.775</b>	<b>4.580.954</b>	<b>2.064</b>	<b>1.418.315</b>	<b>3.979</b>	<b>5.552.384</b>	<b>131%</b>	<b>223%</b>	<b>20%</b>	<b>-17%</b>

Source:ELIME – Processing: INSETE Intelligence

See Appendix

According to *Table 6*, in 2022, the port of Piraeus welcomed 672 cruise ships carrying 832 thousand passengers, compared to 622 cruise ships with 1.1 million passengers in 2019. The port of Santorini followed with 827 thousand passenger arrivals and 686 cruise ships, compared to 981 thousand arrivals and 592 cruise ships in 2019. The port of Mykonos was in third place, with 686 thousand passenger arrivals and 608 cruise ships, compared to 787 thousand arrivals and 550 cruise ships in 2019. Corfu was in fourth place, with 528 thousand passenger arrivals and 392 cruise ships, compared to 768 thousand arrivals and 420 cruise ships in 2019. Noteworthy is the decrease in the average number of passengers per cruise ship, from 1,395 passengers in 2019, to 959 passengers in 2022.

<sup>2</sup>Data concerning the Piraeus Port Authority and the totals overall are an estimate of INSETE Intelligence

Rhodes was next with 370 thousand passenger arrivals and 381 cruise ships, compared to 308 thousand arrivals and 258 cruise ships in 2019. The port of Heraklion welcomed 227 cruise ships with 304 thousand passengers in 2022, compared to 204 cruise ships with 307 thousand passengers in 2019. Katakolo was in seventh place, with 251 thousand passenger arrivals and 198 cruise ships, compared to 414 thousand arrivals and 199 cruise ships in 2019. Chania port in 2022 welcomed 121 cruise ships with 180 thousand passengers, compared to 132 cruise ships with 266 thousand passengers in 2019. This was followed by the ports of Kefalonia/Ithaki, with 145 thousand passenger arrivals and 132 cruise ships, compared to 259 thousand arrivals and 133 cruise ships in 2019. Finally, the port of Patmos welcomed 214 cruise ships with 99 thousand passengers in 2022, compared to 156 cruise ships with 113 thousand passengers in 2019.

Flow at all other ports was less than 95 thousand passengers. Compared to 2019, and based on the number of cruise ships, the majority of ports saw an increase in passenger flows. A -7% decrease was recorded at the port of Corfu, and a -1% decrease at the port of Katakolo and the ports of Kefalonia/Ithaki. The results compared to 2019, based on number of passengers, were the opposite, as the majority of ports saw a decrease. An increase (+20%) was only recorded at the port of Rhodes.



### **3 Domestic Flows**

### 3.1 Domestic arrivals at main airports

Table 7: Domestic Airport Arrivals at Main Airports

2022	Athens	Thessalonik	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	145.795	44.768	18.762	6.467	1.176	32.622	17.056	7.044	887	1.095	51	2.582	7.428	1.317	466	4.564	409	1.171	7.817	301.477
February	164.268	52.349	17.398	6.265	1.285	33.867	17.505	7.839	983	1.183	53	3.242	7.981	2.745	490	4.109	443	1.502	8.327	331.834
March	201.525	63.563	22.505	7.934	1.547	40.789	22.125	9.426	1.288	1.337	127	4.323	15.977	3.197	765	4.851	679	1.701	10.281	413.940
April	264.828	76.252	29.701	11.474	2.433	50.941	27.954	11.873	2.427	2.420	124	14.268	41.305	7.703	828	6.534	1.141	1.808	13.421	567.435
May	333.924	80.569	28.913	10.773	2.778	49.449	28.657	13.687	3.697	3.273	222	28.862	7.472	12.926	786	7.472	1.705	1.973	14.465	631.603
June	393.165	89.707	33.180	12.814	4.029	55.106	31.840	19.778	6.024	5.933	259	40.039	73.342	22.599	1.425	8.056	3.854	1.969	15.762	818.881
July	454.413	102.457	41.615	16.449	6.774	64.152	36.279	22.185	8.484	9.042	439	41.999	70.679	27.713	1.648	10.507	5.273	2.145	20.579	942.832
August	471.121	97.892	40.723	16.160	6.453	62.640	35.466	22.964	8.649	9.068	451	40.815	73.103	26.742	2.055	11.023	5.100	2.047	18.540	951.012
September	431.646	94.032	33.514	11.134	3.523	57.595	31.511	19.722	6.073	5.664	257	37.629	72.651	19.173	1.308	7.992	3.241	1.824	13.863	852.352
October	374.045	87.190	30.003	9.994	2.649	53.650	31.066	13.057	2.417	2.737	98	17.758	55.907	8.305	1.032	6.277	1.332	1.796	13.310	712.623
November	273.031	81.659	25.740	8.832	1.707	49.836	27.058	11.494	1.516	1.531	70	4.831	19.678	4.033	649	5.728	675	1.815	12.813	532.696
December	261.884	86.459	27.664	9.424		52.001	27.400	11.202	1.601	1.652	133	3.547	13.252	2.904	786	5.156	638	2.193	12.179	520.075
<b>Total</b>	<b>3.769.645</b>	<b>956.897</b>	<b>349.718</b>	<b>127.720</b>	<b>34.354</b>	<b>602.648</b>	<b>333.917</b>	<b>170.271</b>	<b>44.046</b>	<b>44.935</b>	<b>2.284</b>	<b>239.895</b>	<b>458.775</b>	<b>139.357</b>	<b>12.238</b>	<b>82.269</b>	<b>24.490</b>	<b>21.944</b>	<b>161.357</b>	<b>7.576.760</b>
2021	Athens	Thessalonik	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	58.768	13.937	6.599	2.526	613	10.342	5.149	2.154	373	475	46	1.202	2.286	1.294	111	2.461	180	413	3.260	112.189
February	51.897	14.452	5.889	1.977	460	9.638	4.451	2.304	351	416	50	893	1.813	1.401	148	2.137	220	419	3.022	101.938
March	61.832	17.223	7.212	2.344	658	10.543	5.002	2.868	439	563	52	1.417	2.458	1.771	162	2.205	254	486	3.810	121.299
April	77.018	22.820	9.826	3.248	1.049	15.419	7.200	3.475	706	888	71	2.507	4.876	3.081	339	2.879	372	840	4.967	161.581
May	136.085	33.693	17.010	6.402	1.640	25.487	13.821	5.902	1.294	1.579	113	6.388	13.190	5.705	444	4.628	914	1.031	7.482	282.808
June	218.363	57.808	23.965	8.537	3.019	34.333	22.645	9.949	2.786	3.601	127	21.353	32.366	12.670	1.068	6.452	2.318	1.655	11.915	474.930
July	321.261	83.912	39.139	12.440	5.179	49.658	32.345	16.497	6.114	5.857	287	32.261	54.174	21.773	1.520	9.412	3.960	2.236	18.079	716.104
August	387.509	89.910	41.259	12.928	5.720	48.676	32.754	19.081	6.905	6.445	285	32.264	55.808	21.524	1.534	9.338	4.102	1.930	16.244	794.216
September	326.811	77.781	29.728	8.951	2.831	40.718	28.813	13.967	3.272	3.786	272	22.327	46.147	14.885	1.149	6.980	2.319	1.706	12.628	645.071
October	284.154	72.079	28.558	8.371	2.088	42.426	28.243	11.615	1.954	2.239	124	10.051	35.478	7.384	741	5.694	1.085	1.681	11.934	555.899
November	223.910	66.381	20.963	7.585	1.433	39.692	20.649	8.583	1.242	1.473	51	4.138	14.605	3.193	595	5.091	574	1.700	11.260	433.118
December	210.862	68.909	22.704	7.744	1.245	41.375	21.062	9.149	1.287	1.502	73	3.022	9.522	2.597	584	4.638	508	1.883	11.314	419.980
<b>Total</b>	<b>2.358.470</b>	<b>618.905</b>	<b>252.852</b>	<b>83.053</b>	<b>25.935</b>	<b>368.307</b>	<b>222.134</b>	<b>105.544</b>	<b>26.723</b>	<b>28.824</b>	<b>1.551</b>	<b>137.823</b>	<b>272.723</b>	<b>97.278</b>	<b>8.395</b>	<b>61.915</b>	<b>16.806</b>	<b>15.980</b>	<b>115.915</b>	<b>4.819.133</b>
2019	Athens	Thessalonik	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
<b>Total</b>	<b>3.973.656</b>	<b>###</b>	<b>400.156</b>	<b>137.362</b>	<b>30.466</b>	<b>648.996</b>	<b>331.079</b>	<b>166.553</b>	<b>45.796</b>	<b>46.859</b>	<b>5.167</b>	<b>254.667</b>	<b>586.109</b>	<b>103.532</b>	<b>12.013</b>	<b>85.704</b>	<b>26.583</b>	<b>33.935</b>	<b>177.021</b>	<b>8.136.511</b>

Δ2022/21	Athens	Thessalonik	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	148,1%	221,2%	184,3%	156,0%	91,8%	215,4%	231,2%	227,0%	137,8%	130,5%	10,9%	114,8%	224,9%	1,8%	319,8%	85,5%	127,2%	183,5%	139,8%	168,7%
February	216,5%	262,2%	195,4%	216,9%	179,3%	251,4%	293,3%	240,2%	180,1%	184,4%	6,0%	263,0%	340,2%	95,9%	231,1%	92,3%	101,4%	258,5%	175,5%	225,5%
March	225,9%	269,1%	212,0%	238,5%	135,1%	286,9%	342,3%	228,7%	193,4%	137,5%	144,2%	205,1%	550,0%	80,5%	372,2%	120,0%	167,3%	250,0%	169,8%	241,3%
April	243,9%	234,1%	202,3%	253,3%	131,9%	230,4%	288,3%	241,7%	243,8%	172,5%	74,6%	469,1%	747,1%	150,0%	144,2%	127,0%	206,7%	115,2%	170,2%	251,2%
May	145,4%	139,1%	70,0%	68,3%	69,4%	94,0%	107,3%	131,9%	185,7%	107,3%	96,5%	351,8%	-43,4%	126,6%	77,0%	61,5%	86,5%	91,4%	93,3%	123,3%
June	80,1%	55,2%	38,5%	50,1%	33,5%	60,5%	40,6%	98,8%	116,2%	64,8%	103,9%	87,5%	126,6%	78,4%	33,4%	24,9%	66,3%	19,0%	32,3%	72,4%
July	41,4%	22,1%	6,3%	32,2%	30,8%	29,2%	12,2%	34,5%	38,8%	54,4%	53,0%	30,2%	30,5%	27,3%	8,4%	11,6%	33,2%	-4,1%	13,8%	31,7%
August	21,6%	8,9%	-1,3%	25,0%	12,8%	28,7%	8,3%	20,4%	25,3%	40,7%	58,2%	26,5%	31,0%	24,2%	34,0%	18,0%	24,3%	6,1%	14,1%	19,7%
September	32,1%	20,9%	12,7%	24,4%	24,4%	41,4%	9,4%	41,2%	85,6%	49,6%	-5,5%	68,5%	57,4%	28,8%	13,8%	14,5%	39,8%	6,9%	9,8%	32,1%
October	31,6%	21,0%	5,1%	19,4%	26,9%	26,5%	10,0%	12,4%	23,7%	22,2%	-21,0%	76,7%	57,6%	12,5%	39,3%	10,2%	22,8%	6,8%	11,5%	28,2%
November	21,9%	23,0%	22,8%	16,4%	19,1%	25,6%	31,0%	33,9%	22,1%	3,9%	37,3%	16,7%	34,7%	26,3%	9,1%	12,5%	17,6%	6,8%	13,8%	23,0%
December	24,2%	25,5%	21,8%	21,7%	-100,0%	25,7%	30,1%	22,4%	24,4%	10,0%	82,2%	17,4%	39,2%	11,8%	34,6%	11,2%	25,6%	16,5%	7,6%	23,8%
<b>Total</b>	<b>59,8%</b>	<b>54,6%</b>	<b>38,3%</b>	<b>53,8%</b>	<b>32,5%</b>	<b>63,6%</b>	<b>50,3%</b>	<b>61,3%</b>	<b>64,8%</b>	<b>55,9%</b>	<b>47,3%</b>	<b>74,1%</b>	<b>68,2%</b>	<b>43,3%</b>	<b>45,8%</b>	<b>32,9%</b>	<b>45,7%</b>	<b>37,3%</b>	<b>39,2%</b>	<b>57,2%</b>

Δ2022/19	Athens	Thessalonik	Rhodes	Kos	Karpathos	Heraklion	Chania	Corfu	Zakynthos	Kefalonia	Aktio	Mykonos	Santorini	Paros	Kalamata	Samos	Skiathos	Kavala	Mytilene	Total
January	-36,2%	-46,6%	-29,3%	-29,2%	-5,8%	-30,3%	-27,8%	-30,6%	-26,7%	-21,8%	64,5%	-21,3%	-57,1%	-43,0%	-15,1%	-19,2%	-4,2%	-56,6%	-32,3%	-36,7%
February	-27,0%	-37,3%	-25,7%	-24,5%	9,7%	-25,9%	-20,4%	-20,8%	-31,7%	-16,5%	96,3%	-1,0%	-56,6%	36,2%	12,4%	-17,0%	-3,3%	-34,6%	-22,3%	-28,5%
March	-22,4%	-32,3%	-19,4%	-17,9%	-10,3%	-23,0%	-12,4%	-19,1%	-19,0%	-19,5%	54,9%	-20,4%	-43,3%	21,4%	23,8%	-17,4%	4,1%	-40,6%	-23,3%	-24,2%
April	-4,1%	-6,3%	-13,1%	1,9%	8,0%	-7,5%	7,0%	-11,0%	-14,0%	23,4%	21,6%	-4,5%	-20,9%	48,3%	-19,8%	-5,2%	-7,5%	-35,9%	-5,2%	-5,9%
May	-5,4%	-5,0%	-19,2%	-7,7%	-2,7%	-9,7%	3,8%	1,3%	0,3%	9,0%	18,7%	3,3%	-89,2%	57,3%	-10,3%	-1,6%	-3,6%	-33,0%	-1,5%	-12,8%
June	-1,6%	-0,7%	-12,0%	0,6%	19,9%	-0,6%	3,2%	13,7%	-4,1%	-2,8%	-54,0%	-4,5%	-5,1%	39,7%	6,7%	-1,0%	-13,7%	-29,4%	-0,7%	-1,1%
July	-0,4%	0,0%	-9,4%	-4,5%	36,9%	2,6%	1,7%	9,8%	3,4%	-11,6%	-68,5%	-15,4%	-5,6%	28,7%	0,8%	-1,8%	-14,0%	-36,5%	-1,9%	-1,2%
August	-1,5%	-1,8%	-11,9%	-8,5%	21,9%	-1,0%	0,0%	14,2%	1,9%	-9,3%	-73,8%	-14,0%	-0,9%	21,6%	14,7%	3,5%	-17,7%	-29,9%	-4,1%	-2,0%
September	0,4%	-3,1%	-12,1%	-12,0%	16,2%	-3,7%	6,8%	22,2%	2,9%	4,9%	-66,3%	-0,1%	-5,2%	39,3%	2,6%	4,5%	-2,1%	-34,4%	-11,9%	-0,5%
October	3,3%	-0,3%	-3,7%	2,8%	39,3%	-2,8%	19,7%	3,3%	-21,9%	12,5%	-40,6%	12,0%	-6,8%	51,6%	-5,1%	-0,5%	58,8%	-38,5%	-3,2%	2,1%
November	4,0%	-1,9%	-2,3%	0,8%	13,7%	1,6%	12,2%	7,6%	1,5%	-9,9%	159,3%	18,4%	-17,1%	66,9%	3,0%	-5,3%	6,5%	-35,5%	-4,7%	1,8%
December	8,0%	3,8%	3,1%	10,0%	-100,0%	7,5%	10,0%	3,4%	1,2%	6,0%	25,5%	12,4%	-8,1%	59,5%	5,5%	-1,6%	36,3%	-19,2%	-9,0%	5,8%
<b>Total</b>	<b>-5,1%</b>	<b>-10,6%</b>	<b>-12,6%</b>	<b>-7,0%</b>	<b>12,8%</b>	<b>-7,1%</b>	<b>0,9%</b>	<b>2,2%</b>	<b>-3,8%</b>	<b>-4,1%</b>	<b>-55,8%</b>	<b>-5,8%</b>	<b>-21,7%</b>	<b>34,6%</b>	<b>1,9%</b>	<b>-4,0%</b>	<b>-7,9%</b>	<b>-35,3%</b>	<b>-8,8%</b>	<b>-6,9%</b>

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

See Appendix

In the period January-December 2022 (Table 7), 7.6 million domestic arrivals were recorded compared to 8.1 million in the period January-December 2019, showing a decrease of -6.9%/-560 thousand arrivals.

In the first quarter of 2022, domestic airport arrivals recorded a significant decline. Specifically, only 301 thousand arrivals were recorded in January (showing a decrease of -36.7%/-175 thousand), 332 thousand arrivals were recorded in February (down -28.5%/-133 thousand) and 414 thousand were recorded in March (down -24.2%/-132 thousand arrivals).

The second quarter started showing improvement, as the decrease in April came to just -5.9%/-36 thousand, with 567 thousand airport arrivals being recorded. The improvement in the recovery rate of domestic airport arrivals slowed in May, as the decrease came to -12.8%/-93 thousand, with arrivals coming to 632 thousand. In June, the decrease came to -1.1%/-9 thousand and 819 thousand airport arrivals were recorded.

The same rate continued into the third quarter. In July, the decrease came to -1.2%/-11 thousand, with 943 thousand arrivals being recorded. In August, 951 thousand airport arrivals were recorded, with the decrease coming to -2.0%/-19 thousand arrivals. In September, a marginal decrease of -0.5%/-5 thousand was recorded, with 852 thousand airport arrivals.

The last quarter started with October showing an increase in airport arrivals by +2.1%/+15 thousand and 713 thousand airport arrivals being recorded. In November, the recovery continued with the increase coming to +1.8%/+9 thousand and 533 thousand arrivals being recorded. Finally, in December, the increase came to +5.8%/+28 thousand and 520 thousand airport arrivals were recorded.

Athens International Airport welcomed 3.8 million arrivals, showing a decrease of -5.1%/204 million, while at Thessaloniki airport 957 thousand arrivals were recorded, showing a decrease of -10.6%/-114 thousand.

As far as individual regional units are concerned (*Table 8*), the largest decrease was recorded in the Cyclades (-11.3%/-106 thousand) and resulted mainly from Santorini, where a decrease of -127 thousand passengers was recorded (-21.7%). A smaller decrease in both absolute numbers and percentage change, was recorded in Mykonos (-5.8%/-15 thousand passengers). Conversely, Paros saw an increase of +36 thousand passengers (+34.6%). Airport arrivals in the Cyclades in the period January-December 2022 came to 838 thousand compared to 944 thousand in the period January-December 2019.

In Crete, 937 thousand airport arrivals were recorded, showing a decrease of -4.4%/-44 thousand passengers, compared to 980 thousand in the period January-December 2019. More specifically, a decrease of -7.1%/-46 thousand was recorded at Heraklion Airport, while by contrast, Chania Airport recorded a slight increase of 0.9%/+3 thousand passengers.

A decrease of -9.9%/-56 thousand was recorded in the Dodecanese, where 512 thousand airport arrivals were recorded in the period January-December 2022, compared to 568 thousand in the period January-December 2019. In Rhodes, 350 thousand passengers were recorded (-12.6%/-50 thousand), while 128 thousand passengers were recorded in Kos (-7.0%/10 thousand). Conversely, passengers in Karpathos came to 34 thousand for an increase of +12.8%/+4 thousand.

A decrease of -1.1%/-3 thousand passengers was recorded in the Ionian Islands, where airport arrivals in the period January-December 2022 came to 262 thousand compared to 264 thousand in the period January-December 2019. In Corfu, 170 thousand airport arrivals were recorded, showing an increase of +2.2%/+4 thousand passengers. Decreases were recorded at all other airports. Specifically, 45 thousand passengers were recorded in Kefalonia (-4.1%/-2 thousand), while 44 thousand passengers were recorded in Zakynthos (-3.8%/-2 thousand) and 2 thousand passengers in Aktio (-55.8%/-3 thousand).

**Table 8: Domestic Airport arrivals by Regional Unit**

Geographical unit	Regional airports					Dodecanese					Cyclades				
	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19
January	54.567	9.204	104.483	492,9%	-47,8%			48		-100,0%	11.327	4.782	22.894	136,9%	-50,5%
February	64.612	6.982	106.810	825,4%	-39,5%						13.968	4.107	23.659	240,1%	-41,0%
March	124.089	11.138	139.435	1014,1%	-11,0%	4.539	49	262	9163,3%	1632,4%	23.497	5.646	36.240	316,2%	-35,2%
April	707.138	20.613	721.163	3330,5%	-1,9%	142.261	389	135.135	36471,0%	5,3%	63.276	10.464	72.324	504,7%	-12,5%
May	1.649.406	215.658	1.768.877	664,8%	-6,8%	450.498	47.199	447.629	854,5%	0,6%	49.260	25.283	105.596	94,8%	-53,4%
June	2.620.182	825.189	2.526.576	217,5%	3,7%	656.749	183.954	638.079	257,0%	2,9%	135.980	66.389	135.368	104,8%	0,5%
July	3.400.153	2.166.864	3.017.127	56,9%	12,7%	830.991	517.785	750.241	60,5%	10,8%	140.391	108.208	146.016	29,7%	-3,9%
August	3.232.888	2.400.707	2.959.511	34,7%	9,2%	786.617	578.993	752.321	35,9%	4,6%	140.660	109.596	143.197	28,3%	-1,8%
September	2.482.256	1.814.107	2.329.699	36,8%	6,5%	632.456	460.706	597.813	37,3%	5,8%	129.453	83.359	128.040	55,3%	1,1%
October	1.311.665	1.179.994	1.117.899	11,2%	17,3%	370.693	331.971	298.694	11,7%	24,1%	81.970	52.913	81.353	54,9%	0,8%
November	118.163	98.201	140.213	20,3%	-15,7%	983	2.664	442	-63,1%	122,4%	28.542	21.936	30.230	30,1%	-5,6%
December	131.839	98.131	151.928	34,4%	-13,2%			7		-100,0%	19.703	15.141	19.391	30,1%	1,6%
<b>Total</b>	<b>15.896.958</b>	<b>8.846.788</b>	<b>15.083.721</b>	<b>79,7%</b>	<b>5,4%</b>	<b>3.875.787</b>	<b>2.123.710</b>	<b>3.620.671</b>	<b>82,5%</b>	<b>7,0%</b>	<b>838.027</b>	<b>507.824</b>	<b>944.308</b>	<b>65,0%</b>	<b>-11,3%</b>

Geographical unit	Crete					Ionian Islands				
	2022	2021	2019	Δ2022/21	Δ2022/19	2022	2021	2019	Δ2022/21	Δ2022/19
January	1.267	458	3.203	176,6%	-60,4%	49				
February	1.437	175	8.085	721,1%	-82,2%					
March	14.525	405	12.245	3486,4%	18,6%	4.990	108	906	4520,4%	450,8%
April	247.612	1.580	256.745	15571,6%	-3,6%	93.902	38	85.278	247010,5%	10,1%
May	532.756	77.032	554.710	591,6%	-4,0%	338.094	25.836	355.252	1208,6%	-4,8%
June	770.740	272.331	746.271	183,0%	3,3%	595.541	150.349	546.635	296,1%	8,9%
July	973.719	686.021	870.762	41,9%	11,8%	790.616	431.684	673.621	83,1%	17,4%
August	929.359	739.754	856.378	25,6%	8,5%	756.567	515.885	653.313	46,7%	15,8%
September	750.774	580.316	717.169	29,4%	4,7%	551.431	375.457	490.152	46,9%	12,5%
October	465.078	439.123	394.626	5,9%	17,9%	186.134	161.491	139.192	15,3%	33,7%
November	10.712	10.484	18.556	2,2%	-42,3%	1.269	406	491	212,6%	158,5%
December	4.708	1.135	4.907	314,8%	-4,1%			145		-100,0%
<b>Total</b>	<b>4.702.687</b>	<b>2.808.814</b>	<b>4.443.657</b>	<b>67,4%</b>	<b>5,8%</b>	<b>3.318.593</b>	<b>1.661.254</b>	<b>2.944.985</b>	<b>99,8%</b>	<b>12,7%</b>

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

See Appendix

### 3.2 Maritime flows <sup>3</sup>

Domestic passenger flows are estimated to have decreased by -8% in 2022 compared to 2019, while the estimate for the number of passengers comes to 17.3 million compared to 18.8 million in 2019 (*Table 9*). More specifically, 1.3 million passengers were recorded in the first quarter, showing a decrease of -35% compared to 2019, while in the second quarter 4.5 million passengers were recorded, showing a decrease of -5.0%. In the third quarter – the high season – the number of passengers was estimated at 9.3 million compared to 8.8 million in 2019, for an increase of +5.0%. The passengers of the third quarter account for 53% of the total number of passengers in 2022. Finally, the decrease in the fourth quarter was estimated at -31% and the number of passengers was estimated at 2.2 million compared to 3.2 million in 2019.

Table 9: Domestic Maritime Flows

Quarter	Passengers			% Change	
	2022	2021	2019	2022-2021	2021-2019
Q1	1.348.530	549.000	2.084.179	146%	-35%
Q2	4.503.072	2.329.000	4.741.265	93%	-5%
Q3	9.262.000	7.700.000	8.797.881	20%	5%
Q4	2.200.000	1.700.000	3.196.644	29%	-31%
<b>Total</b>	<b>17.313.602</b>	<b>12.278.000</b>	<b>18.819.969</b>	<b>41%</b>	<b>-8%</b>

Source: SEEN – Processing: INSETE Intelligence

<sup>3</sup> The data concerning 2022 are estimates and will be updated in the course of the year

## **4 Balance of Travel Services**

## 4.1 Arrivals – Receipts

In 2022, inbound visitor flows decreased by -11.2%, with 27,836 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 16,995 thousand, showing a decrease of -8.4% compared to 2019, while the number of visitors from outside the EU27 decreased by -15.3% and came to 5,428 thousand. The number of visitors from within the euro area increased by +4.5%, while the number of visitors from EU27 countries outside the euro area decreased by -27.5%. More specifically, the visitor flow from Germany increased by +8.1% with 4,352 thousand visitors, while the flow from France increased by +14.0% with 1,758 thousand visitors. With regard to non-EU27 countries, the visitor flow from the United Kingdom increased by +28.2% with 4,485 thousand visitors, while the flow from the United States decreased by -7.7% with 986 thousand visitors. Finally, the visitor flow from Russia decreased by -93.8% with the number of visitors coming to 36 thousand.

In 2022, travel receipts decreased by -3.0% compared to 2019 and amounted to €17,631 million. This development was due to a +3.7% increase in receipts from residents of the EU27 (amounting to €9,978 million) and to an -8.8% decrease in receipts from residents of non-EU27 countries (amounting to €7,246 million). Overall, receipts are €548 million less than in 2019. Of these, €392 million are attributable to the loss of the Russian market, €91 million to a decrease in cruise revenues and €64.1 million from other activity.

Specifically, receipts from euro area residents amounted to €8,020 million, up by +3.7%, while receipts from EU27 residents outside the euro area came to €1,959 million, for a decrease of -2.0%.

More specifically, receipts from Germany increased by +10.0% and amounted to €3,255 million, and receipts from France by +16.4%, amounting to €1,268 million. Of non-EU27 countries, receipts from the United Kingdom showed an increase of +21.8%, amounting to €3,123 million. Receipts from the USA also increased, by +0.6%, and amounted to €1,196 million, while receipts from Russia decreased by -90.5% and amounted to €41 million.

In conclusion, the UK presented the greatest increase (21.8% in revenues and +28.2% in visitor numbers), followed by France (+16.4%/+14.0%) and Germany (+10.0%/+8.1%). It is noteworthy that UK residents showed a decrease in the Spending Per Person (SPP) when compared to residents of France, Germany and the USA, who showed an increase. A marginal increase in revenues (+0.6%) was seen from USA residents, despite a decrease in arrivals of -7.7%.



Despite an increase in revenues and visitor numbers from euro area countries (+3.7%/+4.5%), they presented a decrease in SPP; the converse was true for non-euro area countries (-2.0%/-27.5%) and non-EU countries (-8.8%/-15.3%), for which the SPP was higher despite the decrease.

Finally, based on the Frontier Survey, SPP rose by +9.7% in 2022 to €619 compared to €564 in 2019.

Table 10: Inbound Visitor Flows 2022

2022	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which		Total
			France	Germany				USA	Russia	
January	198	149	16	54	49	144	33	11	2	341
February	187	119	10	42	68	130	23	6	5	317
March	208	153	28	55	55	207	35	21	1	414
April	601	472	92	150	130	455	123	42	3	1.056
May	1.334	1.072	159	437	262	871	411	95	0	2.205
June	2.265	1.596	225	684	669	1.384	592	151	4	3.649
July	3.272	2.048	370	643	1.224	2.005	814	189	4	5.277
August	3.864	2.459	413	827	1.405	2.002	976	133	7	5.866
September	2.813	1.835	231	727	978	1.747	845	189	4	4.560
October	1.596	1.255	165	621	341	1.160	518	140	3	2.756
November	426	248	29	67	179	386	45	68	1	812
December	231	163	18	45	68	349	69	45	1	580
<b>Total</b>	<b>16.995</b>	<b>11.567</b>	<b>1.758</b>	<b>4.352</b>	<b>5.428</b>	<b>10.841</b>	<b>4.485</b>	<b>1.089</b>	<b>36</b>	<b>27.836</b>

2021	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which		Total
			France	Germany				USA	Russia	
January	62	40	3	19	22	34	6	1	0	96
February	40	22	2	8	17	37	4	0	0	76
March	58	31	3	10	27	41	6	1	0	99
April	62	42	4	12	19	46	4	1	0	107
May	206	151	31	55	55	79	12	4	0	285
June	756	513	85	237	243	313	60	31	3	1.069
July	2.062	1.371	261	460	691	755	178	97	27	2.817
August	2.957	2.100	386	733	857	1.118	455	75	24	4.074
September	2.034	1.509	231	680	525	962	452	85	13	2.995
October	1.438	1.225	135	669	213	706	310	69	28	2.144
November	291	228	18	75	63	270	64	17	17	561
December	159	128	15	43	32	221	43	14	8	380
<b>Total</b>	<b>10.123</b>	<b>7.360</b>	<b>1.175</b>	<b>3.001</b>	<b>2.763</b>	<b>4.582</b>	<b>1.591</b>	<b>396</b>	<b>120</b>	<b>14.705</b>

2019	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which		Total
			France	Germany				USA	Russia	
January	346	176	11	68	170	314	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
<b>Total</b>	<b>18.554</b>	<b>11.071</b>	<b>1.542</b>	<b>4.026</b>	<b>7.482</b>	<b>12.795</b>	<b>3.499</b>	<b>1.179</b>	<b>583</b>	<b>31.348</b>

<b>Δ2022/2021</b>	<b>Countries EE-27</b>	<b>Eurozone</b>	<b>of which</b>		<b>non Eurozone</b>	<b>Other</b>	<b>U.K.</b>	<b>of which</b>		<b>Total</b>
			<b>France</b>	<b>Germany</b>				<b>USA</b>	<b>Russia</b>	
January	219,6%	270,2%	424,8%	183,5%	125,2%	324,4%	483,9%	1379,6%	579,3%	256,7%
February	371,5%	433,7%	320,8%	429,4%	292,3%	253,6%	544,9%	1652,2%	3103,2%	314,8%
March	259,9%	399,5%	802,6%	443,9%	102,7%	401,6%	500,8%	1371,7%	1494,5%	318,9%
April	874,7%	1012,4%	2434,1%	1113,0%	571,9%	897,4%	3346,2%	3764,6%	566,8%	884,3%
May	547,6%	609,1%	412,4%	693,0%	378,1%	996,5%	3426,2%	2169,6%	-100,0%	672,5%
June	199,7%	211,2%	166,7%	188,7%	175,3%	342,4%	891,7%	391,8%	58,9%	241,5%
July	58,7%	49,4%	42,0%	39,9%		165,4%	357,9%	95,2%	-85,1%	87,3%
August	30,7%	17,1%	7,1%	12,9%	64,0%	79,1%	114,4%	77,2%	-70,6%	44,0%
September	38,3%	21,6%	0,0%	7,0%	86,4%	81,7%	87,0%	121,2%	-65,1%	52,3%
October	11,0%	2,5%	22,4%	-7,2%	60,2%	64,3%	67,4%	102,6%	-87,9%	28,6%
November	46,5%	8,6%	58,1%	-11,2%	184,1%	42,8%	-28,7%	300,5%	-95,8%	44,7%
December	44,6%	27,6%	18,1%	3,3%	113,2%	58,1%	60,5%	216,2%	-90,4%	52,5%
<b>Total</b>	<b>67,9%</b>	<b>57,2%</b>	<b>49,6%</b>	<b>45,0%</b>	<b>96,4%</b>	<b>136,6%</b>	<b>181,9%</b>	<b>174,9%</b>	<b>-69,8%</b>	<b>89,3%</b>

<b>Δ2022/2019</b>	<b>Countries EE-27</b>	<b>Eurozone</b>	<b>of which</b>		<b>non Eurozone</b>	<b>Other</b>	<b>U.K.</b>	<b>of which</b>		<b>Total</b>
			<b>France</b>	<b>Germany</b>				<b>USA</b>	<b>Russia</b>	
January	-42,9%	-15,4%	38,2%	-19,9%	-71,4%	-54,2%	-12,1%	-56,9%	-78,6%	-48,3%
February		-10,4%	-27,8%	4,5%	-26,7%	-53,2%	-57,4%	-68,5%	-40,4%	-37,0%
March	-41,9%	-26,2%	-6,2%	-20,6%	-63,5%	-50,2%	-31,4%	-65,4%	-87,4%	-46,4%
April	11,9%	21,3%	40,6%	40,0%	-12,7%	2,2%	93,5%	-17,9%	-75,1%	7,5%
May	-5,5%	0,0%	-4,9%	-8,3%	-22,8%	-10,6%	18,1%	-28,2%	-100,0%	-7,6%
June	-5,5%	2,7%	-6,2%	15,7%	-20,6%	-18,8%	8,5%	11,7%	-94,8%	-11,0%
July	-3,1%	5,4%	30,0%	9,2%	-14,6%	-12,7%	26,3%	9,4%	-96,3%	-7,0%
August	-9,4%	6,4%	22,4%	15,2%	-28,1%	-19,9%	31,7%	-30,7%	-94,7%	-13,3%
September	-11,4%	8,4%	-0,9%	11,3%	-34,0%	-9,7%	28,9%	-3,3%	-94,6%	-10,8%
October	-4,0%	9,0%	28,1%	4,4%	-33,4%	4,5%	83,2%	12,3%	-95,9%	-0,6%
November	-13,0%	-0,4%	81,8%	-7,0%	-26,1%	-12,1%	-8,3%	58,0%	-96,2%	-12,6%
December	-25,3%	-16,8%	41,2%	-4,9%	-40,0%	-8,9%	170,8%	55,1%	-93,8%	-16,2%
<b>Total</b>	<b>-8,4%</b>	<b>4,5%</b>	<b>14,0%</b>	<b>8,1%</b>	<b>-27,5%</b>	<b>-15,3%</b>	<b>28,2%</b>	<b>-7,7%</b>	<b>-93,8%</b>	<b>-11,2%</b>

Source: Bank of Greece - Processing: INSETE Intelligence  
See Appendix

**Table 11: Travel Receipts 2022**

2022	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which		Total	Cruises	Total
			France	Germany				USA	Russia			
January	80	63	5	21	18	59	16	7	1	140	0	140
February	72	53	6	18	20	60	13	8	4	132	1	133
March	85	70	13	26	15	107	18	20	1	192	5	197
April	345	310	75	112	34	278	81	33	2	623	24	647
May	828	731	122	331	97	546	244	113	0	1.374	40	1.414
June	1.566	1.240	157	578	327	1.002	427	157	6	2.568	50	2.618
July	2.125	1.580	281	551	545	1.543	686	229	3	3.668	55	3.723
August	2.457	1.908	369	645	549	1.524	800	155	3	3.981	62	4.043
September	1.554	1.219	171	518	334	1.245	590	200	10	2.799	56	2.855
October	827	737	85	370	90	627	257	134	3	1.454	56	1.510
November	127	94	9	22	33	162	22	38	0	290	24	314
December	88	74	7	22	14	153	22	41	1	241	6	247
<b>Total</b>	<b>9.978</b>	<b>8.020</b>	<b>1.268</b>	<b>3.255</b>	<b>1.958</b>	<b>7.246</b>	<b>3.123</b>	<b>1.196</b>	<b>41</b>	<b>17.224</b>	<b>408</b>	<b>17.631</b>

2021	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which		Total	Cruises	Total
			France	Germany				USA	Russia			
January	22	16	1	7	6	13	3	0	0	34	0	34
February	18	15	1	5	4	15	2	0	0	33	0	33
March	24	17	2	6	7	15	2	1	0	39	0	39
April	37	33	5	11	4	21	2	1	1	59	0	59
May	157	134	28	55	24	60	13	9	1	217	5	222
June	560	435	73	215	125	237	58	49	4	798	9	807
July	1.545	1.195	243	422	349	721	252	138	29	2.266	22	2.288
August	2.155	1.753	378	611	402	959	502	132	21	3.114	42	3.156
September	1.302	1.069	164	529	232	772	374	143	13	2.074	39	2.113
October	776	696	79	402	80	478	196	92	30	1.254	40	1.294
November	112	100	8	29	12	144	32	20	10	256	15	271
December	89	73	10	26	16	96	29	9	6	184	2	186
<b>Total</b>	<b>6.798</b>	<b>5.536</b>	<b>992</b>	<b>2.316</b>	<b>1.261</b>	<b>3.531</b>	<b>1.466</b>	<b>596</b>	<b>115</b>	<b>10.328</b>	<b>174</b>	<b>10.503</b>

2019	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which		Total	Cruises	Total
			France	Germany				USA	Russia			
January	106	76	8	25	31	124	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	1.236	455	199	60	2.819	67	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
<b>Total</b>	<b>9.731</b>	<b>7.732</b>	<b>1.090</b>	<b>2.959</b>	<b>1.999</b>	<b>7.948</b>	<b>2.564</b>	<b>1.189</b>	<b>433</b>	<b>17.679</b>	<b>500</b>	<b>18.179</b>

Δ2022/2021	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which			Total	Cruises	Total
			France	Germany				USA	Russia				
January	270,6%	295,1%	486,9%	227,7%	203,3%	373,5%	524,8%	3768,9%	1085,7%	308,4%		309,8%	
February	291,7%	261,2%	420,7%	264,2%	406,6%	312,5%	427,0%	1702,1%	5887,7%	300,9%		302,6%	
March	249,9%	304,5%	714,5%	348,8%	116,7%	624,4%	723,4%	1955,5%	2132,9%	391,6%		404,3%	
April	822,0%	842,6%	1530,6%	951,3%	669,5%	1200,8%	3298,6%	2103,2%	77,4%	959,8%		1000,4%	
May	426,4%	447,2%	335,6%	501,7%	309,2%	807,6%	1707,5%	1162,4%	-100,0%	531,9%	746,2%	536,4%	
June	179,5%	184,9%	116,2%	169,0%	160,8%	321,8%	633,2%	219,3%	38,1%	221,8%	460,7%	224,5%	
July	37,6%	32,2%	15,8%	30,5%	56,1%	113,9%	171,6%	65,8%	-90,6%	61,9%	149,8%	62,7%	
August	14,0%	8,8%	-2,3%	5,6%	36,8%	58,9%	59,5%	17,2%	-83,4%	27,8%	46,2%	28,1%	
September	19,4%	14,0%	4,0%	-2,1%	44,1%	61,3%	57,9%	40,0%	-20,1%	35,0%	42,0%	35,1%	
October	6,6%	5,9%	6,8%	-7,9%	12,8%	31,1%	31,2%	44,6%	-89,0%	15,9%	40,5%	16,7%	
November	13,3%	-5,9%	7,1%	-23,7%	167,5%	13,0%	-32,0%	87,5%	-95,4%	13,1%	62,6%	15,9%	
December	-0,6%	0,8%	-30,6%	-16,4%	-7,1%	59,9%	-24,6%	368,6%	-85,8%	30,8%	238,5%	32,8%	
<b>Total</b>	<b>46,8%</b>	<b>44,9%</b>	<b>27,9%</b>	<b>40,6%</b>	<b>55,2%</b>	<b>105,2%</b>	<b>113,1%</b>	<b>100,6%</b>	<b>-63,9%</b>	<b>66,8%</b>	<b>133,9%</b>	<b>67,9%</b>	

Δ2022/2019	Countries EE-27	Eurozone	of which		non Eurozone	Other	U.K.	of which			Total	Cruises	Total
			France	Germany				USA	Russia				
January	-24,4%	-17,1%	-32,5%	-13,1%	-42,6%	-51,9%	-4,2%	-52,0%	-89,1%	-39,2%	-25,0%	-39,2%	
February	-21,7%	-25,0%	-30,7%	-18,9%	-11,2%	-42,8%	-45,7%	-48,4%	38,5%	-32,9%	-50,0%	-33,0%	
March	-35,6%	-34,0%	17,8%	-23,2%	-41,8%	-39,3%	-41,3%	-55,2%	-80,4%	-37,7%	-50,0%	-38,1%	
April	33,4%	36,1%	92,8%	62,7%	13,5%	13,5%	95,7%	-16,1%	-51,6%	23,7%	-40,0%	19,0%	
May	-0,4%	1,3%	16,3%	-3,7%	-12,0%	-20,0%	-5,7%	-19,6%	-100,0%	-9,2%	-23,0%	-9,7%	
June	13,2%	10,5%	-10,4%	38,5%	24,7%	-9,5%	14,1%	9,2%	-90,8%	3,1%	-25,0%	2,3%	
July	6,6%	3,4%	33,8%	1,1%	17,3%	-6,0%	25,4%	8,5%	-97,2%	0,9%	-20,0%	0,5%	
August	4,5%	5,3%	36,0%	11,7%	1,8%	-9,0%	29,0%	-23,5%	-96,7%	-1,1%	-20,0%	-1,5%	
September	-1,9%	-0,1%	1,0%	-2,6%	-7,9%	0,8%	29,7%	0,5%	-82,5%	-0,7%	-16,3%	-1,1%	
October	12,7%	17,0%	6,0%	10,6%	-13,7%	-3,1%	69,2%	4,4%	-93,1%	5,2%	-30,0%	3,3%	
November	-9,4%	-17,4%	12,5%	-32,8%	25,0%	11,0%	16,7%	59,7%	-93,4%	1,0%	-15,0%	-0,4%	
December	-28,6%	-30,2%	37,7%	-18,9%	-19,1%	-6,1%	-17,2%	55,6%	-87,1%	-15,8%	-25,0%	-16,1%	
<b>Total</b>	<b>2,5%</b>	<b>3,7%</b>	<b>16,4%</b>	<b>10,0%</b>	<b>-2,0%</b>	<b>-8,8%</b>	<b>21,8%</b>	<b>0,6%</b>	<b>-90,5%</b>	<b>-2,6%</b>	<b>-18,5%</b>	<b>-3,0%</b>	

Source: Bank of Greece - Processing: INSETE Intelligence  
See Appendix

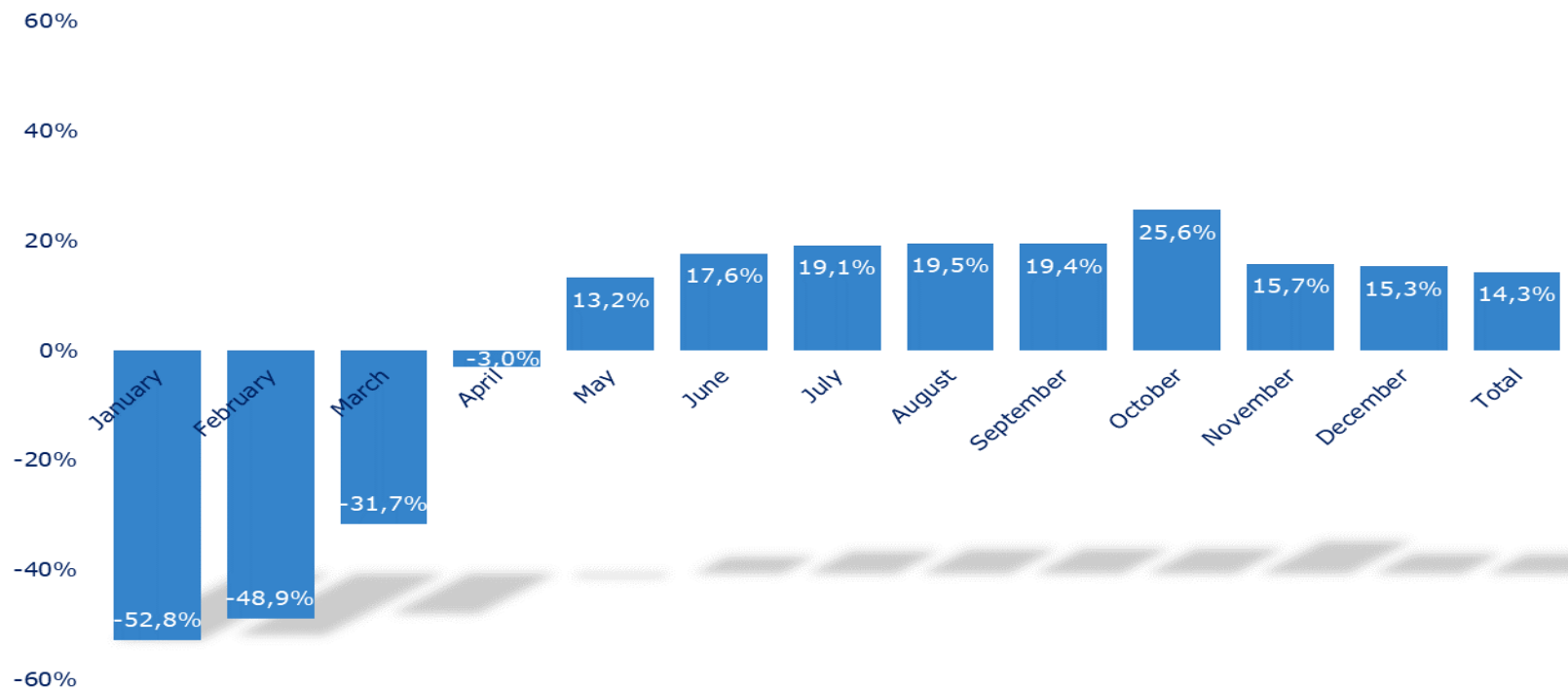
## **5 Accommodation Services**

## 5.1 Greek hotel activity

### 5.1.1 Change in revenue in selected accommodations

A +14.3% increase in revenue was recorded in 2022 compared to 2019 (*Graph 5*). A decrease was recorded for the period January-April, and an increase for the period May-December. More specifically, a -52.8% decrease was recorded in January and a -48.9% decrease in February. The decrease slowed in March and came to -31.7%, and was just -3.0% in April. An increase was recorded for the first time in May at +13.2%, while June showed a +17.6% increase. In July, the increase came to +19.1%, in August to only +19.5% and in September to +19.4%. The highest increase (+25.6%) was recorded in October. Finally, the increase in November was +15.7% and +15.3% in December.

Chart 4: Change in Revenue in Selected Accommodations – 2022 relative to 2019



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

## 5.1.2 Arrivals of residents and non-residents in hotels and similar establishments, camping grounds and collective short-stay accommodation establishments

For the period January-September 2022, an +87.0% increase in arrivals was recorded across all hotels and similar establishments, camping grounds and collective short-stay accommodation establishments compared to the same period in 2021. (Table 13). More specifically, arrivals of non-residents showed a +102.0% increase while arrivals of residents showed a +51.0% increase. The largest share of arrivals in hotels and similar establishments pertained to non-residents (16.8 million), while arrivals of residents came to 5.3 million. A similar picture was observed in short-stay accommodation establishments, with arrivals of residents coming to 1.3 million and arrivals of non-residents coming to 4.4 million.

Table 12: Arrivals of residents and non-residents in hotels and similar establishments, camping grounds and collective short-stay accommodation establishments

Month	2022					2021					Change 2022/2021		
	Hotels and similar establishments and tourist campsites			Short-stay accommodation establishments		Hotels and similar establishments and tourist campsites			Short-stay accommodation establishments		Total	Residents	Non-residents
	Total	Residents	Non-residents	Residents	Non-residents	Total	Residents	Non-residents	Residents	Non residents			
January	431.420	290.460	91.991	38.695	10.274	146.591	109.080	25.972	9.443	2.096	194,3%	177,7%	264,3%
February	480.544	317.903	118.888	33.562	10.191	169.046	129.441	27.373	10.102	2.130	184,3%	151,9%	337,5%
March	747.595	411.407	280.948	41.867	13.373	207.799	151.404	40.554	12.970	2.871	259,8%	175,8%	577,8%
April	1.803.184	569.255	1.062.591	60.846	110.492	193.278	132.099	46.981	11.198	3.000	832,9%	339,7%	2247,1%
May	3.287.949	542.398	2.339.141	64.162	342.248	605.147	223.465	309.627	27.995	44.060	443,3%	141,2%	658,1%
June	4.532.577	656.380	2.985.788	157.285	733.124	1.921.447	526.610	1.046.371	125.346	223.120	135,9%	24,8%	192,9%
July	5.618.463	818.759	3.376.930	297.554	1.125.220	3.765.280	709.521	2.308.141	242.101	505.517	49,2%	17,3%	60,0%
August	6.265.707	1.010.552	3.529.024	469.850	1.256.281	4.438.395	872.542	2.577.946	373.255	614.652	41,2%	18,8%	49,9%
September	4.536.306	634.528	2.966.094	158.018	777.666	3.367.348	562.089	2.232.957	123.705	448.597	34,7%	15,6%	39,6%
<b>Jan-Sep</b>	<b>27.703.745</b>	<b>5.251.642</b>	<b>16.751.395</b>	<b>1.321.839</b>	<b>4.378.869</b>	<b>14.814.331</b>	<b>3.416.251</b>	<b>8.615.922</b>	<b>936.115</b>	<b>1.846.043</b>	<b>87,0%</b>	<b>51,0%</b>	<b>102,0%</b>

Source: EL. STAT – Processing: INSETE Intelligence

See Appendix



### 5.1.3 Nights spent by residents and non-residents in hotels and similar establishments, camping grounds and collective short-stay accommodation establishments

For the period January-September 2022, a +89.1% increase in nights spent was recorded across all hotels and similar establishments, camping grounds and collective short-stay accommodation establishments compared to the same period in 2021 (*Table 14*). More specifically, the number of nights spent by non-residents showed a +100.8% increase while the number of nights spent by residents showed a +40.8% increase. The largest number of nights spent in hotels and similar establishments pertains to non-residents (79.4 million), while the number of nights spent by residents was 12.6 million. A similar picture was observed in short-stay accommodation establishments, with nights spent by residents coming to 4.6 million and non-residents to 22.7 million.

Table 13: Nights spent by residents and non-residents in hotels and similar establishments, camping grounds and collective short-stay accommodation establishments

Month	2022					2021					Change 2022/2021		
	Hotels and similar establishments and tourist campsites			Short-stay accommodation establishments		Hotels and similar establishments and tourist campsites			Short-stay accommodation establishments				
	Total	Residents	Non-residents	Residents	Non-residents	Total	Residents	Non-residents	Residents	Non residents	Total	Residents	non-resident
January	904.074	556.443	210.431	103.154	34.046	380.183	235.584	98.112	38.522	7.965	137,8%	140,6%	130,5%
February	996.696	592.967	273.354	99.905	30.470	408.460	268.794	99.391	33.490	6.785	144,0%	129,2%	186,2%
March	1.507.511	647.659	663.157	159.745	36.950	509.539	323.592	127.147	48.113	10.687	195,9%	117,2%	407,9%
April	4.929.256	1.086.884	3.154.016	204.053	484.303	591.166	365.839	172.082	39.659	13.586	733,8%	218,4%	1859,6%
May	12.820.797	1.092.339	9.984.786	211.010	1.532.662	1.883.756	442.526	1.179.392	73.440	188.398	580,6%	152,6%	742,0%
June	19.750.508	1.527.839	14.162.774	540.345	3.519.550	7.273.925	1.181.750	4.616.560	370.356	1.105.259	171,5%	33,3%	209,0%
July	27.524.214	2.301.977	17.904.024	1.100.650	6.217.563	16.705.834	2.060.063	11.114.783	881.936	2.649.052	64,8%	15,7%	75,3%
August	30.089.498	3.312.533	18.334.632	1.605.166	6.837.167	20.317.996	2.865.201	12.855.053	1.257.280	3.340.462	48,1%	19,3%	55,4%
September	20.758.199	1.457.348	14.698.403	599.016	4.003.432	14.995.441	1.298.344	10.831.462	434.478	2.431.157	38,4%	18,7%	41,0%
<b>Jan-Sep</b>	<b>119.280.753</b>	<b>12.575.989</b>	<b>79.385.577</b>	<b>4.623.044</b>	<b>22.696.143</b>	<b>63.066.300</b>	<b>9.041.693</b>	<b>41.093.982</b>	<b>3.177.274</b>	<b>9.753.351</b>	<b>89,1%</b>	<b>40,8%</b>	<b>100,8%</b>

Source: EL. STAT – Processing: INSETE Intelligence

See Appendix

## **6 Quality Ratings**

## 6.1 Quality ratings for Greece

Table 15 shows the Global Review Index (GRI) for Greece for the years 2022, 2021 and 2019. In 2022, Greece's GRI for hotels was at 87.0% compared to 87.1% in 2019. It is worth noting that the majority of individual ratings for hotels improved during 2022 compared to 2019, apart from the categories of Food and Drink, and Entertainment. Three ratings were higher than the GRI: the ratings for Cleanliness (91.2%), Service (89.7%) and Location (87.3%). The Value for Money rating came to 84.9% and the Room rating to 84.6%. The Food and Drink rating came in lower at 83.5%. The only rating that came in under 80% was for Entertainment, with 76.7%.

Table 14: Quality Ratings 2022-2019

Greece	2022	2021	2019	Change 2022-2021	Change 2022-2019
Cleanliness	91,2%	91,5%	90,3%	▼	▲
Service	89,7%	90,4%	88,8%	▼	▲
Location	87,3%	87,5%	86,6%	▼	▲
Value for Money	84,9%	85,1%	84,4%	▼	▲
Room	84,6%	85,8%	83,6%	▼	▲
Food-Drink	83,5%	83,9%	83,9%	▼	▼
Entertainment	76,7%	79,5%	77,6%	▼	▼
<b>GRI</b>	<b>87,0%</b>	<b>87,6%</b>	<b>87,1%</b>	▼	▼

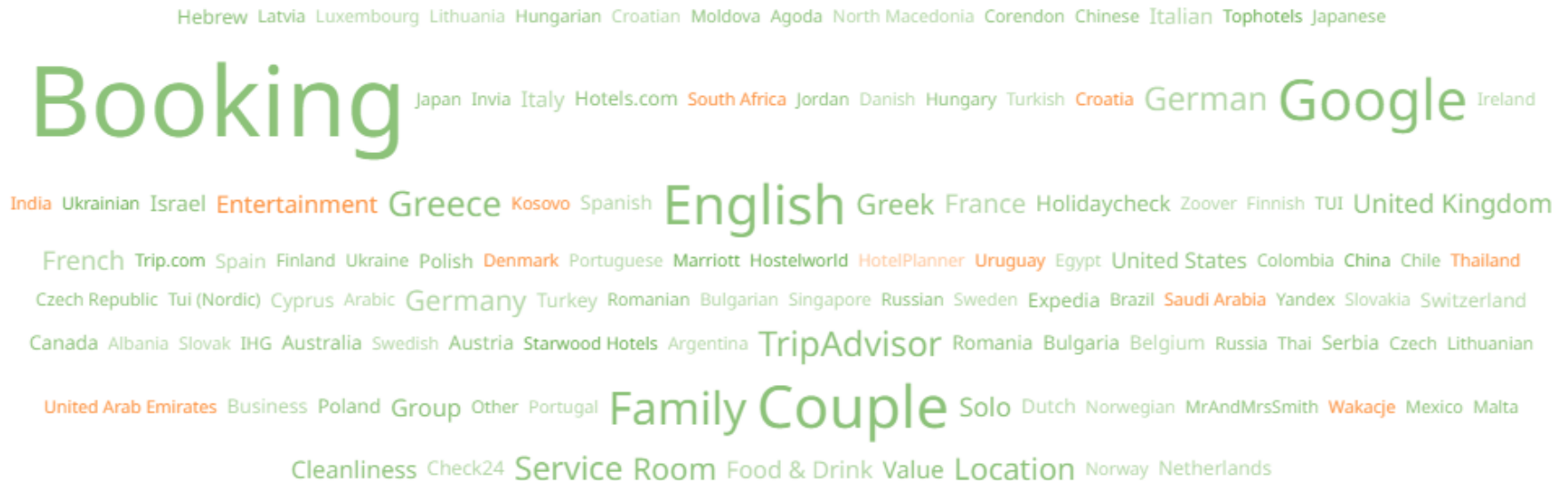
Source: ReviewPro - Processing: INSETE Intelligence

See Appendix

## 6.2 GRI – The topic cloud

The topic cloud (*Graph 6*) provides a quick and visual way to identify the key drivers that are affecting the 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; and the darker the orange, the more neutral the rating. They show some obvious topics, such as sources of comments: Booking, Google, Tripadvisor, etc. We can also see keywords that signal visitors’ positive attitude, depending on the type of visitor (‘Couple’, ‘Family’ and ‘Solo’) and the visitor’s country of origin (‘United Kingdom’, ‘German’, ‘France’, ‘Greek’, etc.). However, what definitely stands out are the positive comments about hotels and services which were widely discussed online in 2022, such as ‘Service’, ‘Room’, ‘Location’, ‘Value’ and ‘Cleanliness’.

Chart 5: Topic Cloud



### 6.3 Main Categories with Positive Mentions

The top-10 main thematic categories that generated the most positive online mentions for 2022 resulted from the semantic analysis of the comments (*Table 16*). It is worth noting that, as regards the categories that appear in the top-10 positive mentions and in the top-18 negative mentions, positive mentions are significantly more than the negative ones. In first place, with 193 thousand mentions, is the Food and Drink category, with most positive mentions containing the keyword 'breakfast'. This was followed by the Establishment category with 106 thousand mentions, most of which contained the word 'hotel'. The Staff category generated more than 103 thousand positive mentions. This was followed by the Experience category (85 thousand mentions) and the Cleanliness category (69 thousand mentions). There were approximately 41 thousand positive mentions for the Beach category, with most mentions containing the keyword 'sea'. In seventh place was the Service category (31 thousand mentions), followed by the Entertainment category (31 thousand mentions), with 'animation team' being the main keyword. Ninth place was taken by the Ambience category, with the keyword 'quiet' and 29 thousand mentions. Finally, 10<sup>th</sup> place was taken by the Spa category, with the keyword 'massage' and 8 thousand mentions.

Table 15: Top-10 Positive Mentions

Rank	Categories	Negative Mentions	Top Concept
1	Food and Drinks	192.553	Breakfast
2	Establishment	105.644	Hotel
3	Staff	102.869	Staff
4	Experience	85.175	Everything
5	Cleanliness	68.590	Cleanliness
6	Beach	41.004	Sea
7	Service	31.178	Service
8	Entertainment	30.654	Animation team
9	Ambience	29.054	Quiet
10	Spa	7.982	Massage

Source: ReviewPro - Processing: INSETE Intelligence

See Appendix

## 6.4 Main Categories with Negative Mentions

The top-18 of the main thematic categories that generated the greatest number of negative online mentions for 2022 resulted from the semantic analysis of the comments (*Table 17*). In first place was the Food and Drink category – with 55 thousand mentions – with most negative mentions containing the keyword ‘drink’. This was followed by the Room category with 46 thousand mentions, most of which contained the keyword “air conditioning”. The Facilities category came next, with 26 thousand mentions and ‘water’ as the keyword. The negative mentions containing the word ‘water’ specifically referred to freezing water in swimming pools, poor swimming pool maintenance, and the lack of hot water in the bathroom during the stay. The Establishment category generated more than 25 thousand negative mentions, with the main keyword being ‘building’.

The Cleanliness category occupied fifth place, with 21 thousand mentions and ‘dirty’ as the key driver. The Ambience category followed in sixth place with 18 thousand mentions and ‘noise’ as the keyword. In seventh place with 18 thousand mentions was the Value category, with ‘payment’ as the keyword. The Bathroom category followed with 17 thousand mentions.

There were 12 thousand negative mentions in the Experience category, with most mentions containing the keyword ‘visitor’. The Staff category was next with 11 thousand mentions; the main keyword was ‘communication’, mainly referring to the difficulties in communicating with the staff primarily because of their poor use of English, but also of German. The Location category came in at 11<sup>th</sup> place with 10 thousand mentions and with most negative mentions containing the keyword ‘taxi’, pertaining to the lack of connection to ports and airports.

This was followed by the Entertainment category with 9 thousand mentions, most of which contained the keyword ‘music’, either referring to its being too loud or not available. In 13<sup>th</sup> place was the Bed category, with 8 thousand negative mentions of ‘mattresses’. The Service category drew 8 thousand negative mentions, with the keyword ‘line’. The Decoration category was in 15<sup>th</sup> place with the keyword ‘furniture’ (relative to its age). In 16<sup>th</sup> place was the Maintenance category, with almost 7 thousand negative mentions referring to ‘broken’, followed by the Reception category, with almost 7 thousand negative mentions about ‘communication with reception’. Finally, in 18<sup>th</sup> place was the Beach category, with 7 thousand negative mentions.

Table 16: Top-18 Negative Mentions

Rank	Categories	Negative Mentions	Top Concept
1	Food and Drinks	54.565	Drink
2	Room	46.137	Air conditioning
3	Facilities	25.996	Water
4	Establishment	24.563	Building
5	Cleanliness	21.250	Dirty
6	Ambience	18.316	Noise
7	Value	17.846	Payment
8	Bathroom	15.409	Bathroom
9	Experience	12.188	Guest
10	Staff	11.482	Communication
11	Location	10.125	Taxi
12	Entertainment	8.690	Music
13	Bed	7.725	Mattress
14	Service	7.495	Queue
15	Decoration	7.117	Furniture
16	Maintenance	7.117	Broken
17	Reception	6.863	Reception
18	Beach	6.589	Beach

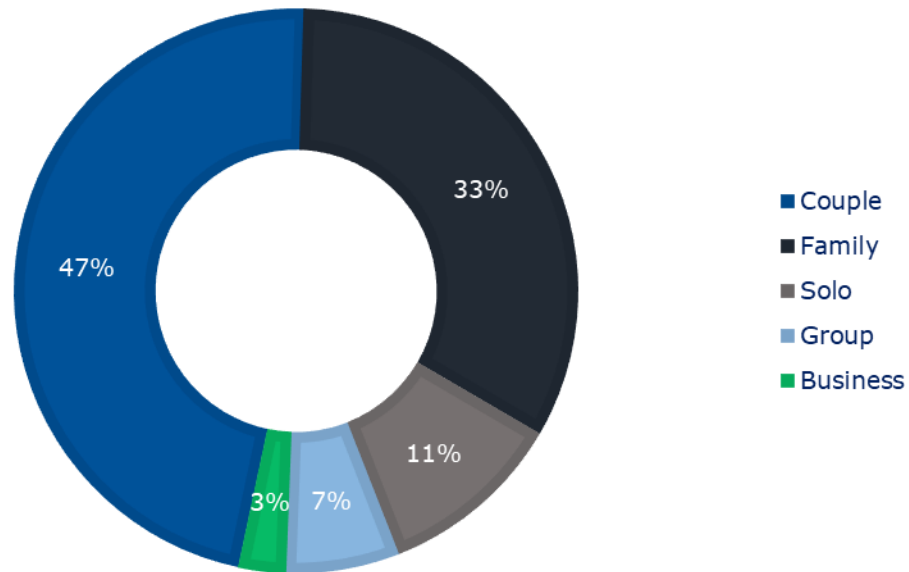
Source: ReviewPro - Processing: INSETE Intelligence

See Appendix

## 6.5 Travel Type based on Comment Analysis

About 80% of comments derive from two travel type categories (*Graph 7*): 47% relate to couple travel and 33% to family travel. Solo travellers account for 11% of comments, while group travellers account for 7%. Finally, business trips only account for 3% of comments.

Chart 6: Travel Type



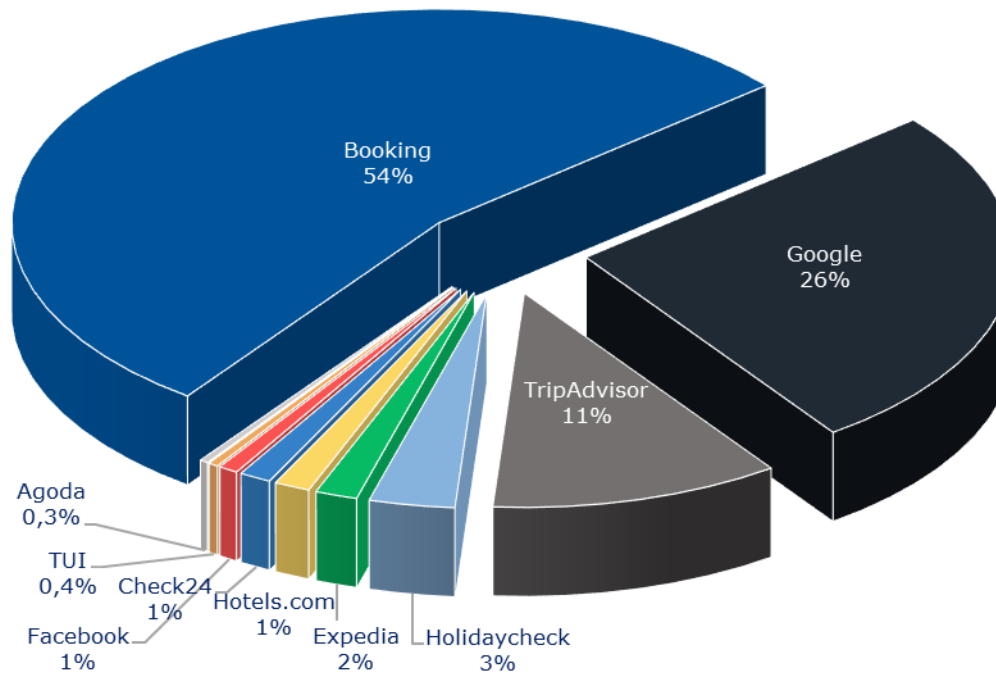
Source: Review Pro – Processing: INSETE Intelligence



## 6.6 Top-10 Comment Sources

There were two main comment sources for 2022: Booking (54%) and Google (26%) (*Chart 8*). Tripadvisor was in third place (11%), while other sources account for less than 5%. HolidayCheck accounts for 3%, Expedia for 2% and Hotels.com, Facebook and Check24 for 1%, respectively. Finally, TUI (0.4%) and Agoda (0.3%) complete the top-10. Note that the top-10 represent nearly all sources.

Chart 7: Top-10 Sources



Source: Review Pro – Processing: INSETE Intelligence

## 6.7 Net Promoter Score

The Net Promoter Score for all of 2022 in all star hotel categories and most regional units remains high (greater than 30). The NPS was at high levels in three regional units, such as Crete, the Cyclades and the Dodecanese, which receive the largest volume of tourists. Specifically in the Cyclades at the start of the tourist season (April-May) and at the end (November), the NPS remained at high levels (more than 70), while for the period June-October it ranged from 58 to 68. Conversely, for the Ionian Islands, at peak tourist season in August, the NPS dropped to just 28. Two more cases of a low NPS were recorded in the regional unit of North Aegean, with 30 in January and just 19 in April 2022.

Chart 8: Net Promoter Score 2022

Net Promoter Score (NPS)*													
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
2022													
Greece	53	53	51	51	54	51	46	42	46	49	50	49	50
5*	63	62	60	59	64	58	52	49	56	59	60	57	58
4*	54	54	53	49	52	50	44	38	44	48	49	46	48
3*	48	52	44	46	48	48	46	40	43	45	47	47	46
1*-2*	44	43	44	46	47	46	43	37	37	39	41	42	42
Eastern Macedonia-Thrace	54	53	52	45	43	52	47	45	45	50	45	50	49
Attica	54	55	53	45	45	40	37	35	36	39	46	51	45
North Aegean	30	41	32	19	41	42	40	33	37	40	35	32	35
Western Macedonia	51	68	63	59	51	58	66	64	56	63	69	66	61
Dodecanese	43	48	39	53	57	52	44	37	47	51	47	38	46
Epirus	64	67	58	64	63	63	67	60	63	61	63	60	63
Thessaly	46	52	41	44	52	54	53	46	49	46	53	44	48
Ionian Islands	52	38	56	42	49	37	32	28	35	44	46	41	42
Central Macedonia	54	47	49	47	51	50	44	39	43	43	44	45	46
Crete	59	62	62	62	60	54	48	44	49	51	55	46	54
Cyclades	43	-	68	74	73	67	63	58	61	68	71	52	63
Peloponnese	54	42	51	50	57	59	55	46	49	53	55	48	52
Central Greece	53	49	51	44	48	50	47	37	41	49	46	44	47

In 2019, the NPS score shows that customer satisfaction was at a consistently high level (>30) throughout the year, with a positive differentiation in the regional unit of the Cyclades at the beginning and end of the season (May and October 2021), when the NPS score was very high (71).

Chart9: Net Promoter Score 2019

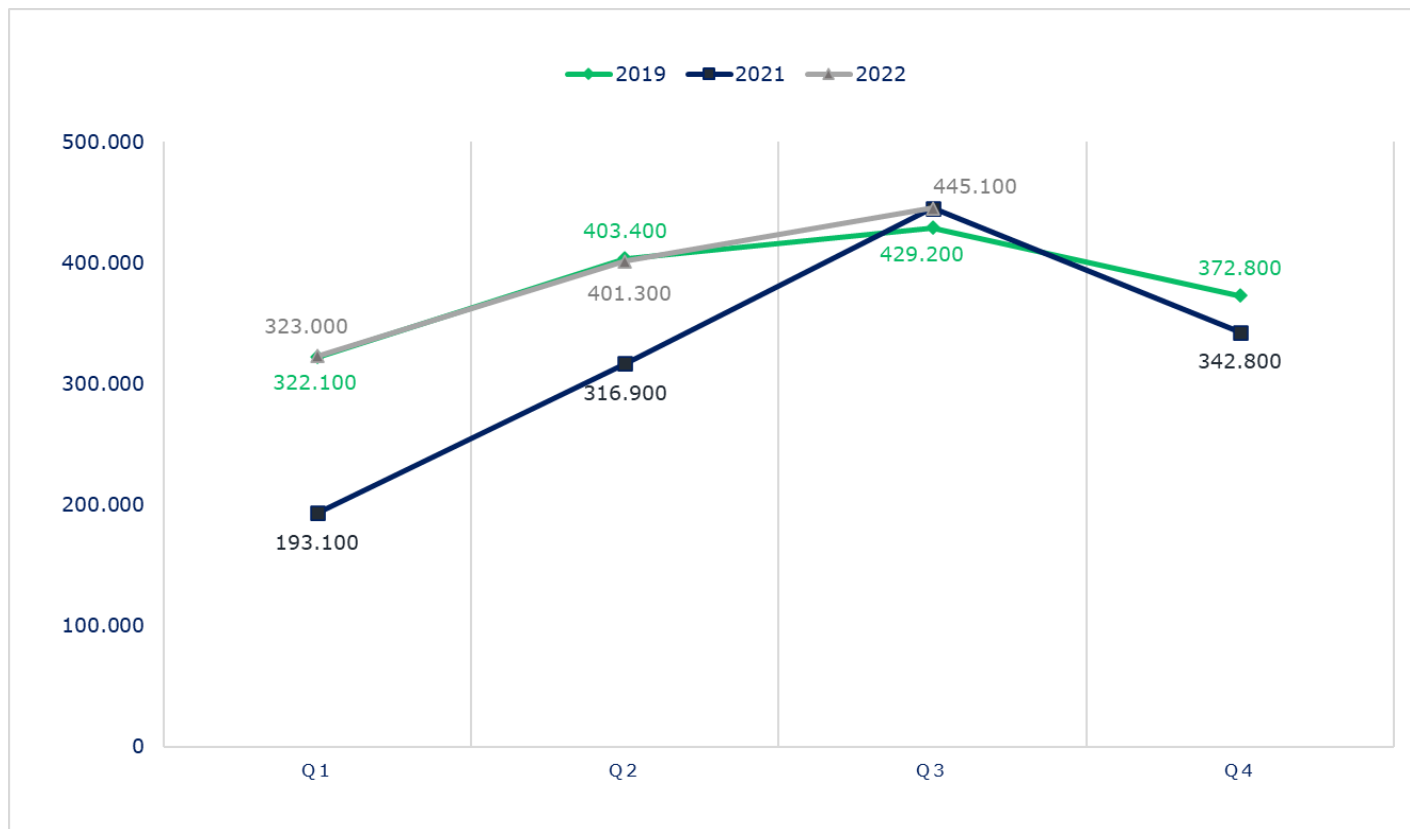
Net Promoter Score (NPS)*													
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.
<b>2019</b>													
Greece	47	49	47	50	53	52	52	47	50	51	49	48	50
5*	54	57	56	60	62	59	58	54	57	58	59	59	58
4*	46	48	45	47	52	50	49	45	46	49	47	45	48
3*	47	47	45	47	49	50	50	47	47	47	46	42	47
1*-2*	33	38	40	42	44	47	47	42	45	44	39	43	42
Eastern Macedonia-Thrace	56	52	51	49	52	54	57	51	51	50	50	50	52
Attica	48	47	47	45	43	42	46	44	43	43	47	49	45
North Aegean	42	53	44	47	47	52	50	47	50	46	44	37	47
Western Macedonia	54	54	49	56	53	54	56	55	55	56	62	47	54
Dodecanese	42	52	45	53	56	55	52	47	48	52	50	43	50
Epirus	55	53	57	57	60	57	61	64	59	59	54	54	57
Thessaly	37	47	40	44	51	55	53	48	53	51	45	41	47
Ionian Islands	33	43	36	40	46	46	43	38	40	47	50	64	44
Central Macedonia	45	46	45	46	51	48	47	44	46	47	45	47	46
Crete	54	54	57	59	58	55	54	49	52	51	54	56	54
Cyclades	47	56	57	67	71	69	64	58	65	71	67	55	62
Peloponnese	42	47	46	52	52	54	52	46	48	54	48	42	49
Central Greece	51	55	46	47	56	55	57	49	51	50	50	46	51

## **7 Workforce Survey**

## 7.1 Accommodation and food service activities

During the first quarter of 2022, 323 thousand employees were recorded as working in accommodation and food services, showing a +0.3% increase compared to 2019. In the second quarter, the decrease in the number of employees was -0.5%, with 401 thousand employees recorded compared to 403 thousand for the corresponding quarter in 2019. The third quarter was a period of recovery, with 445 thousand employees being recorded, showing an increase of +3.7% compared to 2019 (429 thousand).

Chart10: Employee progress in accommodation and food services



Source: ELSTAT – Processing: INSETE Intelligence

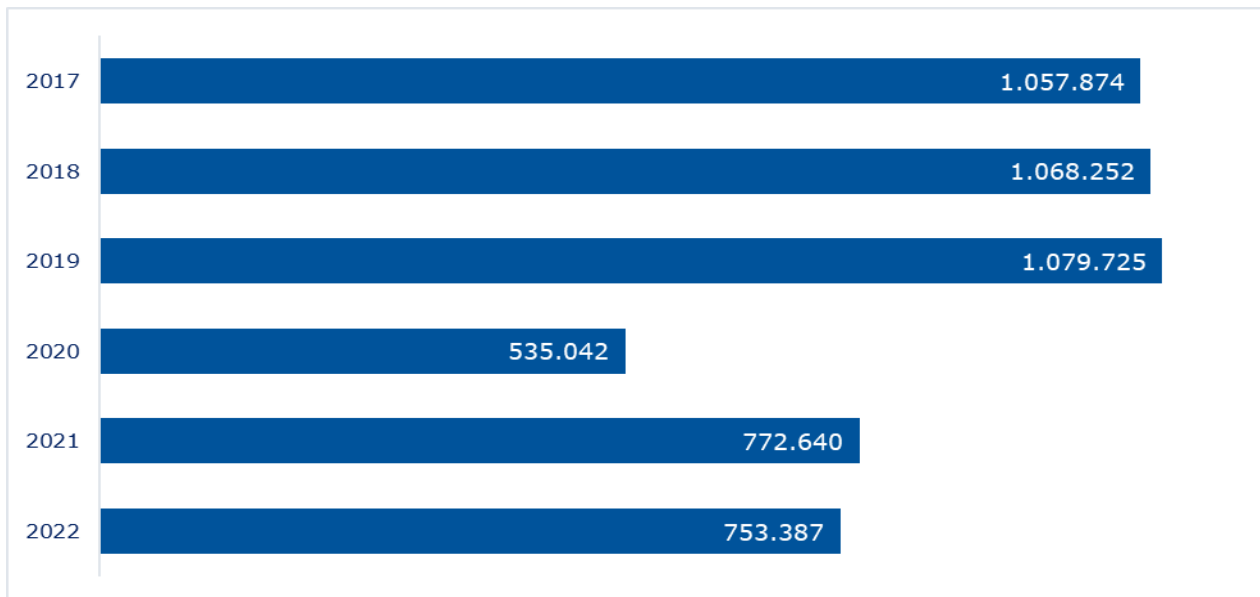
## **8 Car Rentals**

## 8.1 Users 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 broader tourism development for the last 40 years. Car rentals decreased dramatically in 2020 due to the restrictive measures in response to the COVID-19 outbreak while, according to estimates, sales are expected to reach pre-pandemic levels in 2023-24.

According to the data in Chart 12, it is estimated that the number of users in Greece in 2022 came to 753 thousand, compared to 772 thousand in 2021, for a marginal decrease of -2%. The highest rate was recorded in 2019, where the number of users amounted to 1.1 million. Overall in 2022, users decreased by -30% compared to 2019.

Chart 11: Users of the Car Rental Market

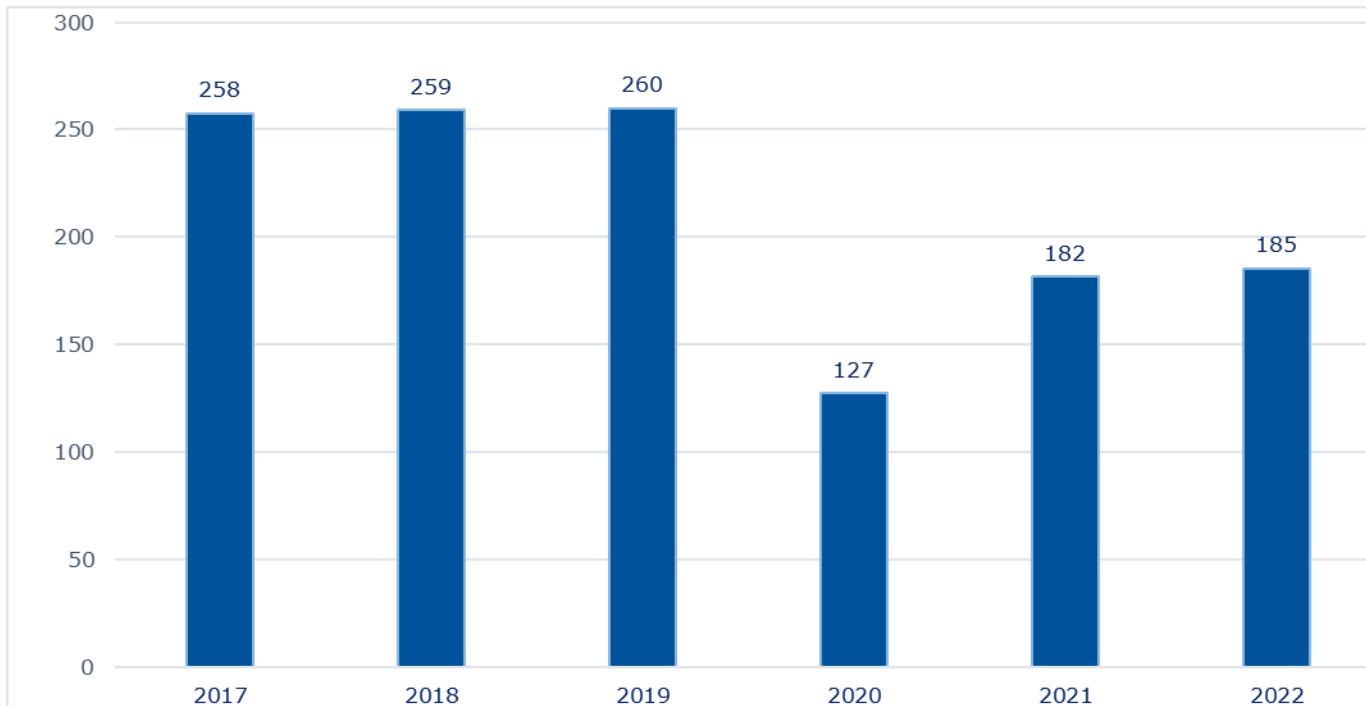


Source: Statista – Processing: INSETE Intelligence

## 8.2 Car rental activity

Revenues from car rentals in 2022 came to €185 million compared to €182 million in 2021 for an increase of +2%. The highest rate was recorded in 2019, where revenue from car rentals amounted to €260 million. Overall in 2022, revenues decreased by -29% compared to 2019.

Chart 12: Revenue from Car Rentals in million euros



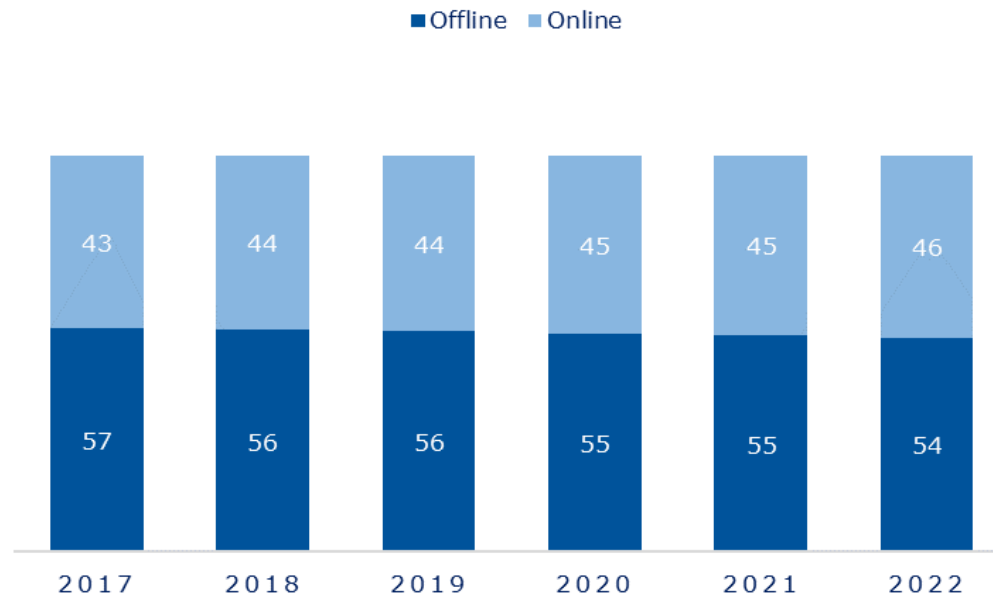
Source: Statista – Processing: INSETE Intelligence



### 8.3 Car rental channels

Online sales showed an increase in 2022, compared to 2021. In 2022 the share of online sales stood at 46%, compared to 54% for offline sales. Online sales have been rising since 2017, but at a very slow rate. Indicatively, in 2017 the share of online sales stood at 43%, compared to 57% for offline sales.

Chart 13: Percentage Distribution of Car Rentals



Source: Statista – Processing: INSETE Intelligence

## **9 Annex**

## Notes and clarifications of the data in tables and graphs

**International airport arrivals:** The data show arrivals of passengers on international flights, irrespective of their domicile. As regards the data for Athens International Airport, given the disruptions of the survey and/or the small sample size during the period March 2020-June 2021, the respective passenger volume estimates should be treated with caution and comparisons should be avoided. 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 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.

**Arrivals based on the Bank of Greece Border Survey:** The figures are estimates based on a sample survey, and pertain to arrivals of residents of other countries, irrespective of the travel mode (air, road, sea) and regardless of nationality, i.e. they include Greek nationals permanently residing abroad but do not include foreign nationals permanently residing in Greece.

**Receipts based on the Bank of Greece Border Survey:** The Border Survey estimates receipts based on a sample survey among residents of other countries who visit Greece.

**GBR:** The sample consisted of 200 hotels and the revenue index was based on room revenue for Thessaloniki and Athens hotels and on total revenues for hotels in other regions.

**ELSTAT:** Data on guest arrivals and nights spent in hotels and similar establishments and camping grounds in Greece are collected through the Survey on Arrivals and Nights spent in Hotels, Similar Establishments and Camping Grounds, which is carried out on a monthly basis through the completion of a special form by each establishment for every month of its operation. All hotels and similar establishments and camping grounds in Greece are required to provide the aforementioned statistical data. This is a census survey which is carried out on a monthly basis. Results are arrived at through the collection and processing of the relevant data submitted via a specific questionnaire by hotels, similar establishments and camping grounds for each month of operation. The questionnaires are mostly submitted electronically via ELSTAT's electronic application 'Xenios Zeus' or, alternatively, for establishments where this is not possible, in paper form. The survey is based on the Statistical Register of hotels, similar establishments and camping grounds, which is updated from administrative sources in the course of the year so that data pertain to the actual number of accommodation establishments and camping grounds that are in operation.

Employment figures (number of employees, unemployed, etc.) are estimated through the use of a suitable unbiased estimator, which takes account of: a) the probability of selection of the sample households, b) the households' response rate in every primary sampling unit (area), c) the population distribution by gender and age group in every Region and d) the distribution of private household numbers throughout Greece. As of January 2021, survey data are collected by means of an online questionnaire. Economic activities are classified on the basis of the product that is produced or the service that is provided. Since 2008, STAKOD 08 has been used, which is identical to NACE Rev2. The Labour Force Survey collects data based on the three-digit level for the main job and on the two-digit level for the second and previous job.

**Hellenic Ports Association:** The Hellenic Ports Association releases aggregate arrival and passenger data for the Greek cruise industry.

**SEEN:** The Association of Passenger Shipping Companies (SEEN) presents estimates of the number of passengers for the Adriatic market and of domestic maritime flows.

**Statista:** The Car Rental section includes vehicle rentals booked in person, by phone, through the internet or an application. Users represent people who have booked a trip, regardless of number of travellers. This section takes into account the rental agreements based on time with advance payment of fixed charges by professional car rental services, such as SIXT, Hertz and Budget. The following are not included: carpools, chauffeur services, taxis or ride sharing offers using invoice models based on use or offers.

## Sources

ELSTAT (2022, December 22). Survey on Hotel Type Accommodation and Camping. Available at [https://www.statistics.gr/el/statistics?p\\_p\\_id=documents\\_WAR\\_publicationsportlet\\_INSTANCE\\_qDQ8fBKKo4IN&p\\_p\\_lifecycle=2&p\\_p\\_state=normal&p\\_p\\_mode=view&p\\_p\\_cacheability=cacheLevelPage&p\\_p\\_col\\_id=column-2&p\\_p\\_col\\_count=4&p\\_p\\_col\\_pos=1&\\_documents\\_WAR\\_publicat](https://www.statistics.gr/el/statistics?p_p_id=documents_WAR_publicationsportlet_INSTANCE_qDQ8fBKKo4IN&p_p_lifecycle=2&p_p_state=normal&p_p_mode=view&p_p_cacheability=cacheLevelPage&p_p_col_id=column-2&p_p_col_count=4&p_p_col_pos=1&_documents_WAR_publicat)

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INSETE

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**Επιχειρησιακό Πρόγραμμα**  
**Ανάπτυξη Ανθρώπινου Δυναμικού,**  
**Εκπαίδευση και Διά Βίου Μάθηση**  
Με τη συγχρηματοδότηση της Ελλάδας και της Ευρωπαϊκής Ένωσης

