HELLENIC REPUBLIC
MINISTRY OF TOURISM

UNWTO
World Tourism Organization

European Bank
for Reconstruction and Development

Project:

Facilitating Tourism Recovery in the Aftermath of COVID-19, Greece

Activity:

Measurement of the COVID-19 Tourism Impact and Develop Monitoring Guidelines

COVID-19 Tourism Impact Assessment Report

April 2022

Acknowledgement

This report is the outcome of the activity "Measurement of the COVID-19 Tourism Impact and Develop Monitoring Guidelines", part of the joint project of the European Bank for Reconstruction and Development (EBRD) and the World Tourism Organization (UNWTO)_titled "Greece: COVID-19 Tourism Recovery Technical Assistance Cooperation Package – Facilitating Tourism Recovery in Aftermath of COVID-19."

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Lastly, from the UNWTO side, this study was conducted by the Tourism Statistics Expert Ms. Ana Rivas under the supervision of Ms. Vanessa Satur and Mr. Marcel Leijzer, Managers, UNWTO, and Mr. Nikolaos Gkolfinopoulos, Senior Project Specialist, UNWTO.

All partners involved hope that this report will shed new light onto how the Tourism Statistics can help Greece monitor the positive and negative impact tourism has to the economy and destinations of the country and help make the

decision making of the stakeholders, especially when dealing with urgent crisis situations.

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List of Abbreviations

BoP	Balance of Payments
CAGR	Compound Annual Growth Rate
EBRD	European Bank for Reconstruction and Development
GDP	Gross Domestic Product
INSETE	Institute of the Greek Tourism Confederation (SETE)
IRTS 2008	International Recommendations for Tourism Statistics 2008
MoT	Ministry of Tourism
OECD	Organization for Economic Cooperation and Development
TSA	Tourism Satellite Account
UNWTO	World Tourism Organization

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1. Introduction

The world is facing an unprecedented global health crisis, the repercussions of which are being felt in all sectors of society and the economy. While governments and health institutions worldwide are doing their utmost to combat and contain the spread of the virus, this has resulted in widespread lockdown measures including the closure of hotels, restaurants, retail, cultural and natural attractions as well as the reduction of travel and temporary closure of borders. This has had devastating repercussions on economies as well as on loss of jobs with the tourism sector being one of the most severely impacted.

As of April 2022, tourism represents 30% of the world's export of services (US$ 1.5 trillion), with 45% in developing countries. In May 2020, the World Tourism Organization (UNWTO) already forecasted that the impacts of COVID-19 will result in international tourist arrivals dropping by 60% to 80% when compared with 2019 figures. Putting this into context, UNWTO notes that in 2009, on the back of the global economic crisis, international tourist arrivals declined by 4%, while the SARS outbreak led to a decline of just 0.4% in 2003.

Greece has always been considered among the classic tourism destinations worldwide, and especially within the European region. Following ten years of hard economic crisis, Greek tourism has demonstrated advanced resilience. In 2018, the country managed to break the threshold of 30 million international tourists (UNWTO) and in 2019 reached 34 million of international tourist arrivals (Bank of Greece).

Though during the Greek debt-crisis until 2016, Greece lost almost half of its GDP comparing to 2008 levels (World Bank), while the tourism sector was continuously contributing more than 20% of the total exports of the country, based on UNWTO data. Greece was one of the first EU countries to react proactively with strict measures to fight the pandemic and the contagious nature of the virus. At the end of February 2020, Greece halted all carnival events, and by March a series of restrictions were progressively adopted, with restriction on movements of residents effective as of 23 March.

Regarding Greece's tourism sector and following the first nation-wide lockdown measures due to the pandemic, on 1 June 2020 Greece reopened bars, restaurants, and hotels of year-round activities and on 1 July 2020 the country and its tourism industry opened the borders to international tourism based on the epidemiological profile of the countries which were being constantly monitored.

During summer 2021, public quarantine measures have been lifted and the country opened to international tourism. Greece has concrete guidelines for tourists entering the country, depending on the destination they come from and regulations and protocols in place, to ensure a smooth and safe tourism season. Based on the UNWTO data received through the UNWTO Tourism Recovery Tracker, in 2021 Greece experienced a drop in International Tourism Arrivals of 77% compared to 2019. The 2021 data shows signs of moderate recovery. According to the same source, in 2020 Greece recorded a decline of 80% in international tourism receipts compared to the country's performance in 2019.

At the start of this project (late 2021), the world was facing a very positive travel recovery forecast for 2021 and 2022, which had to be revised downwards after the emergence and rapid expansion of the Omicron variant. The sixth wave led again to a significant contraction in demand, reminding tourism stakeholders of the highly uncertain territory in relation to this situation.

In March 2022, as this report is being finalised, another disruptive and unforeseen element appeared, namely the geopolitical situation in the Black Sea region, a conflict of a different nature and scope, with a significant impact on the global economy and on the travel sector in particular. This situation is having a major impact on destinations that are highly dependent on the Russian market, due to the interruption of air connections. On the other hand, and at the global level, rising oil costs are leading to higher air fares and higher inflation is eroding income and expected consumer recovery.

The emergence of this conflict within the Black Sea area inevitably delays the recovery of the tourism industry. On the other hand, it drives the need to review and strengthen our systems and capacities for measuring the different aspects of the tourism industry also in times of crisis, so that it is able to provide decision-makers with relevant data and information to help build more resilient economies and destinations, extending the benefits of tourism to the economic and social fabric in a sustainable way.

This document is focusing on providing a concrete overview of the impact of the pandemic on tourism in Greece through the statistics available in the country. Several issues have been identified and solutions were proposed in the "Tourism Impact Monitoring Guidelines" report prepared also as part of this activity. Based on the findings of this assessment, that separate report provides recommendations and guidelines on how to improve the monitoring of tourism performance through tourism statistics based on the characteristics and particularities of Greece and the institutions that produce the relevant data and insights.

2. Methodology[1]

2.1 Methodological framework

To evaluate the utility of the data already available, and to identify the type of information needed, also when analyzing the data for each unit of analysis, the authors followed the international methodological framework established by the United Nations, which is included in these two manuals:

- International Recommendations for Tourism Statistics 2008 (IRTS 2008) – which provides the main concepts, definitions and classifications for the measurement of tourism.
- Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA: RMF 2008) – which enables the measurement of tourism in economic terms.

2.2 Data sources

Official secondary sources have been used for the preparation of graphs and quantitative data. The table below shows the statistical reference sources for the analysis of each chapter. More detailed information on these and other sources available in Greece can be found in Annex 10 of this report.

[1] *UNWTO highly recommends to study in-depth the contents of the cited publications, where so many situations and cases are described, based on the specific situations faced by different countries*

- *International Recommendations for Tourism Statistics 2008 (IRTS 2008).*
- *Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA: RMF 2008).*
- *The System of National Accounts 2008 (2008 SNA) is the latest version of the international statistical standard for the national accounts, adopted by the United Nations Statistical Commission (UNSC).*

Table 1. Statistical reference sources for the analysis.

1. INBOUND TOURISM	2. DOMESTIC TOURISM	3. OUTBOUND TOURISM
Border Survey (Bank of Greece) Accommodation Survey (ELSTAT)	Household Budget Survey (ELSTAT) Vacation Survey (ELSTAT) Accommodation Survey (ELSTAT)	Border Survey (Bank of Greece) Household Budget Survey (ELSTAT)
4. EMPLOYMENT	**5. TOURISM INDUSTRIES**	**6. ECONOMY**
Labour Force (ELSTAT)	Accommodation Survey (ELSTAT) MITE (Ministry of Tourism)	Tourism Turnover Index (ELSTAT) Greek Balance BoP – Travel Item (Bank of Greece)

2.3 Meetings

For the preparation of this report, personal meetings and exchange of information, coordinated by the Greek Ministry of Tourism, were held with the following stakeholders:

Table 2. Interviewed stakeholders.

Institution	Division
Bank of Greece	Statistics Department
Athens International Airport	Senior Developer, Airline Development
Hellenic Statistical Authority	Sectoral Statistics Division, Tourism and Culture Statistics Section
Hellenic Statistical Authority	Sectoral Statistics Division, Tourism and Culture Statistics Section
Civil Aviation Authority	Data division
Fraport Greece	Continuous Improvement & Analytics Manager
Hellenic Chamber of Hotels/ Research Institute for Tourism	Research Institute for Tourism
Greek National Tourism Organisation	Head of Dpt. of Market Research
Hellenic Police	Border Protection Dpt.
University of Aegean	Professor- Laboratory of Local and Island Development- Department of the Environment
Ministry of Tourism	Head of Dpt. of Tourism Policy Planning
	Head of Dpt. of National Register of Tourism companies
	Head of Dpt. for Research Studies and Documentation

3. Impact on the Greek economy

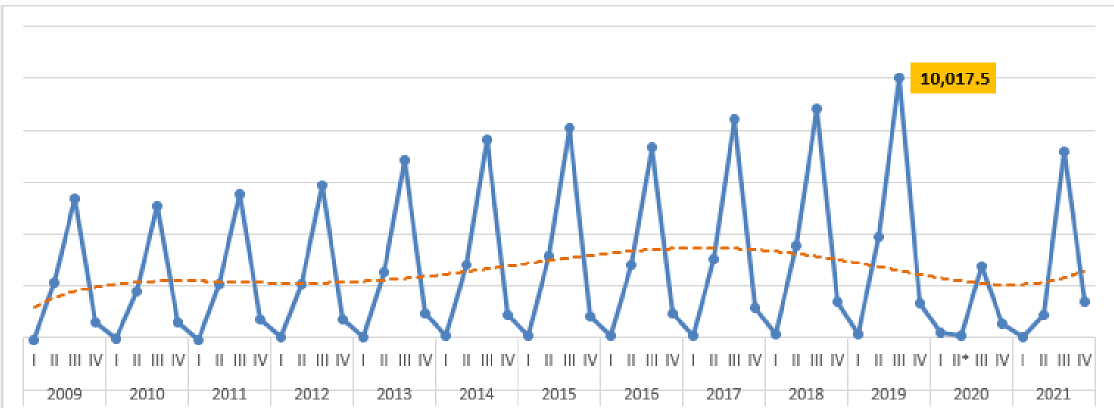
Tourism is one of the most important sectors of the Greek economy and a key pillar of economic growth. This chapter analyses the different official sources that provide data on the economic dimension of tourism, as well as an estimate of tourism GDP, carried out by other institutions.

3.1 Balance of Payments – Travel Item

The balance of payments is a macroeconomic statistic that records transactions between residents and non-residents, irrespective of the transaction currency, during a specified time period, prepared by the Bank of Greece. It should be kept in mind that this measurement refers to total trips, both tourist and non-tourist, so it does not exclusively measure tourism activity, but it is still a good indicator of economic impact.

For a traveller's expenditure to be considered under this heading, his or her stay in the country must be for a period of less than one year. The expenditure that is incurred by frontier and seasonal or other short-term frontier workers is also included. As for the type of goods or services consumed by the travellers, it should be noted that tourism in the Balance of Payment (BoP) does not include international transport, which is recorded as a separate component in the Tourism Services Account (TSA).

Figure 1. Balance of Payments (BoP) Travel Item, 2009-2021 (million €) [numbering in the chart below is unclear]



BoP Travel Item	Q1	Q2	Q3	Q4
2019 (Million €)	**164,6**	**3,912.5**	**10,017.5**	**1,340.3**
	1%	25%	65%	9%
YoY 2020-2019	22.1%	-98.6%	-72.6%	-60.8%
YoY 2021-2019	-90.7%	-78.2%	-28.5%	1.5%

Source: Bank of Greece

While 2019 saw a positive balance of € 15,434.95 million, in 2020 the difference between tourism receipts and expenditure at the national level was less than € 4,000 million. The balance in 2021 is still far from the figures for 2019, but in the last quarter the figures for the reference year were already exceeded, which can be interpreted as the beginning of a recovery, until further developments are known.

3.2 Turnover Index in Accommodation and Food Service Activities

The turnover indices in services are important business indicators, which show the evolution of the services market. The objective of these indices is to calculate the activity of the surveyed sector in value terms. Turnover comprises of the total invoices recorded by the observation unit during the reference period (quarter) and corresponds to the market sales of goods and services supplied to third parties. Subsidies on goods or services are also included. Turnover excludes VAT and other similar deductible taxes directly linked to turnover as well as all duties and taxes on the goods or services recorded by the observation unit. Income classified as other operating income, financial income and extraordinary income in company accounts is also excluded.

The Turnover Index in Accommodation and Food Service Activities sector, covers the whole country, for the activities of Section I of the statistical classification NACE Rev 2 "Accommodation and Food Service Activities". It includes the following groups: 55.1 (Hotels and similar accommodation), 55.2 (Holiday and other short-stay accommodation), 55.3 (Camping grounds, recreational vehicle parks and trailer parks), 55.9 (Other accommodation), 56.1(Restaurants and mobile food service activities), 56.2 (Event catering and other food service activities), 56.3 (Beverage serving activities).

The reference year is 2015.

Table 2. Turnover Index divisions 55 and 56, 2019-2021.

Year	Quarter	Overall Index (1) div. 55_56	y-o-y change (%)	q-o-q change (%)	Index div. 55	y-o-y change (%)	q-o-q change (%)	Index div 56	y-o-y change (%)	q-o-q change (%)
2019	Q1	42,8	-22,5	-39,3	21,3	-45,4	-66,9	62,6	-10,8	-17,7
	Q2	124,5	1,5	190,9	155,7	-1,3	631,0	95,7	5,7	52,9
	Q3	234,7	6,1	88,5	330,6	4,0	112,3	146,3	10,9	52,9
	Q4	73,9	4,8	-68,5	65,2	1,2	-80,3	82,0	7,8	-44,0
	Annual average	119,0	1,3		143,2	-1,1		96,7	4,9	
2020	Q1	39,9	-6,8	-46,0	16,6	-21,9	-74,5	61,3	-2,0	-25,2
	Q2	19,7	-84,2	-50,6	4,7	-97,0	-71,6	33,5	-65,0	-45,5
	Q3	86,7	-63,1	340,1	82,2	-75,1	1641,5	90,9	-37,9	171,6
	Q4	31,3	-57,6	-63,9	22,3	-65,8	-72,9	39,7	-51,6	-56,3
	Annual average	44,4	-62,7		31,5	-78,0		56,4	-41,7	
2021	Q1	16,1	-59,6	-48,6	6,2	-62,7	-72,2	25,3	-58,7	-36,3
	Q2	49,7	152,3	208,7	40,7	766,0	556,5	58,0	73,1	129,2
	Q3(2)	192,5	122,0	287,3	260,7	217,2	540,5	129,6	42,6	123,4
	Q4(3)	65,0	107,7	-66,2	55,5	148,9	-78,7	73,8	85,9	-43,1
	Annual average (3)	80,8	82,0		90,8	188,6		71,7	27,2	

Source: ELSTAT

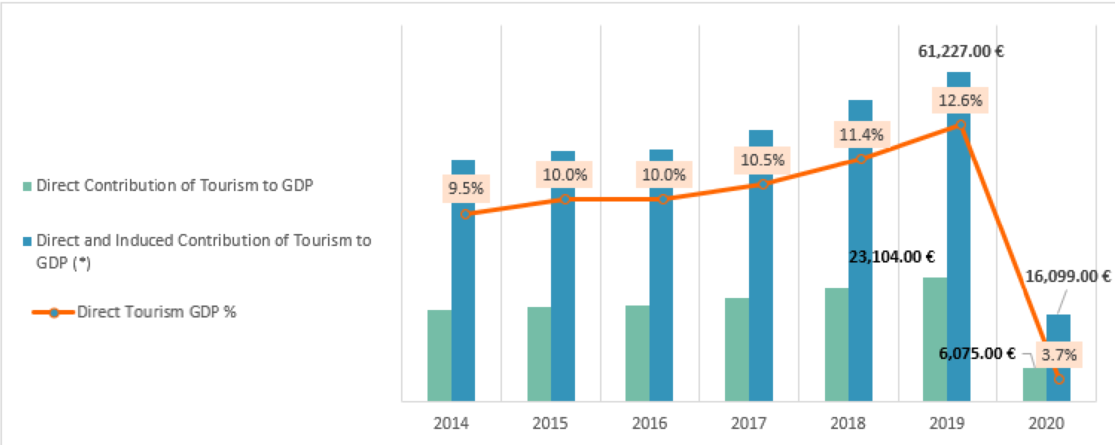
The turnover index in 2020 was only 44.4 points away from the reference year, an index that reached 119 points in 2019. 2021 shows a much more positive figure (80.8 points).

3.3 Contribution of tourism to GDP

Tourism is one of the most important sectors of the Greek economy and a key pillar of economic growth. Yet, Greece does not currently have official data for the calculation of the contribution of tourism to the national economy (GDP). This chapter includes calculations and estimates made by the Institute of the Greek Tourism Confederation (INSETE).

According to this source, direct Tourism GDP accounted for 12.60% of total GDP in 2019 (a figure well above the world average: 4%, 2019) with € 23,104 million. When applying the multipliers developed by the Centre of Planning and Economic Research (KEPE) to estimate the induced impact of tourism, the above figure rises to € 61,227.00 million, or 33.4% of GDP in 2019. These figures give us an idea of the critical role that this industry plays in the country's economy, and therefore of the high economic impact of COVID-19.

Figure 3. Contribution of Tourism to GDP (million €)



Source: Bank of Greece, ELSTAT, CLIA, INSETE

INSETE estimates that tourism GDP was 12.6% in 2019 and fell sharply to 3.7% in 2020.

Table 3. Main figures of the contribution of tourism to GDP, YoY 2020-2019

Year	Inbound Tourism	Transport & Cruise	Domestic Spend	Direct Contribution of Tourism to GDP	Direct Tourism GDP %	Direct and Induced Contribution of Tourism to GDP (*)	Direct and Induced GDP %	Total Greece GDP
2019	17,680.00 €	2,647.00 €	2,777.00 €	23,104.00 €	12.60%	61,227.00 €	33.4%	183,250.00 €
2020	4,094.00 €	572.00 €	1,409.00 €	6,075.00 €	3.70%	16,099.00 €	9.7%	165,326.00 €
YoY	-13,586.00 €	-2,075.00 €	-1,368.00 €	-17,029.00 €	-8.9 pp	-45,128.00 €	-23.70 pp	-17,924.00 €
	-76.8%	-78.4%	-49.3%	-73.7%		-73.7%		-9.8%

Source: Bank of Greece, ELSTAT, CLIA, INSETE
(*) Based on the Centre of Planning and Economic Research (KEPE) multiplier

The figures for Direct Tourism GDP in 2020 show a drop of 8.9 points, with a loss of € 17,029 million, mainly due to the decline in income from international tourist arrivals (a decrease of 76.8%).

3.4 Impact on employment

Applying the international measurement standards set by the United Nations (UNWTO) and The Organization for Economic Co-operation and Development (OECD)[2], the impact of tourism on employment should be measured on the Tourism Industries. The tourism industries comprise all establishments for which the principal activity is a tourism characteristic activity:

Figure 4. List of categories of tourism characteristic consumption products and tourism characteristic activities (tourism industries), IRTS 2008.

Products		Activities	
1.	Accommodation services for visitors	1.	Accommodation for visitors
2.	Food and beverage serving services	2.	Food and beverage serving activities
3.	Railway passenger transport services	3.	Railway passenger transport
4.	Road passenger transport services	4.	Road passenger transport
5.	Water passenger transport services	5.	Water passenger transport
6.	Air passenger transport services	6.	Air passenger transport
7.	Transport equipment rental services	7.	Transport equipment rental
8.	Travel agencies and other reservation services	8.	Travel agencies and other reservation services activities
9.	Cultural services	9.	Cultural activities
10.	Sports and recreational services	10.	Sports and recreational activities
11.	Country-specific tourism characteristic goods	11.	Retail trade of country-specific tourism characteristic goods
12.	Country-specific tourism characteristic services	12.	Other country-specific tourism characteristic activities

Current statistical sources in Greece do not allow the identification of these industries and their associated employment. The branches of employment studied in the available sources provide data for Accommodation Services and Food Services. It should be noted, therefore, that these employment figures are partial and that total employment in the tourism industry as a whole is much higher.

On the other hand, not all employment in the tourism industries is associated with tourism activity, as these services are also used by residents or non-tourist visitors. This is the case, for example, of much of the activity in catering establishments or passenger

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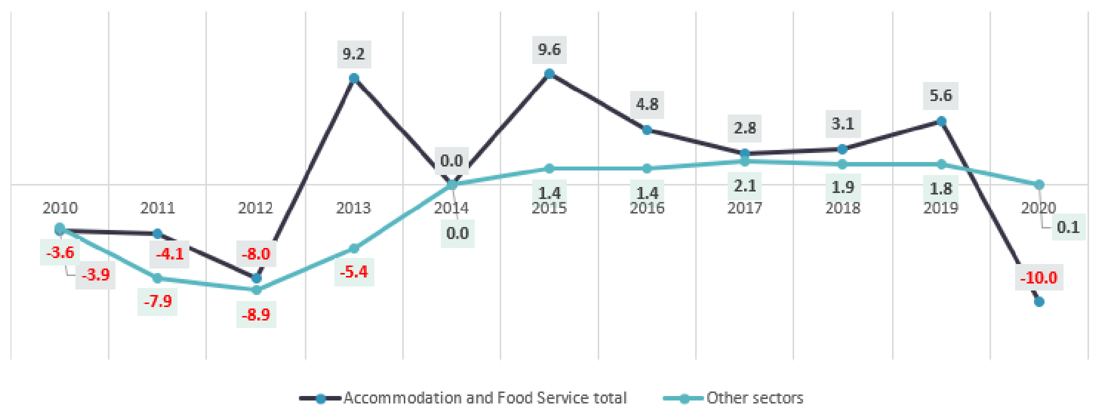
[2] *IRTS 2008 UNWTO and RMF 2008, UNWTO.*

transport. Knowing the employment of tourism industries directly associated with tourism activity would imply having a Tourism Satellite Account (TSA), where these implications between supply and demand are collected. Greece conducted a pilot exercise for a TSA in 2017 and is currently in the process of compiling the necessary data to obtain results by the end of 2023.

The employment data contained in this chapter, therefore, belongs to two specific branches of the set of tourism industries as a whole, and constitutes the total number of jobs in these industries, whether or not they are linked to tourism demand.

The accommodation and food services sectors in 2019 employed 381.856[3] people in 2019, accounting for 10% of total employment in the country. As can be seen in the graph, employment in these industries has grown much faster year on year than in the other sectors, bouncing back strongly in 2012 after the economic crisis.

Figure 5. Labour Force YoY variance per sector 2009-2020



Employment	Food Service (1)	Accommodation (2)	Total
2019	287,398	94,495	**381,856**
2020	273,443	70,193	**343,635**
YoY 2020-2019	-4.8%	-25.7%	-10%

Source: ELSTAT

[3] *Labor Force Survey, ELSTAT.*

As is well known, the effects of the pandemic have been particularly damaging for the tourism industry, which is also reflected in a much more pronounced fall in employment in this sector than for the whole.

For further analysis, data on establishments, turnover and employment for 4-digit economic activities (NACE Rev.2), available only for 2018, have been requested from ELSTAT. Based on this data, the correspondences with the tourism industries have been identified, according to UNWTO methodology for TSA.

This is a preliminary analysis, which would require further refinement, as well as the incorporation of an important component of tourism in Greece, such as retail shops selling handicrafts and souvenirs, as well as other economic activities characteristic of the country linked to tourism.

Table 4. List of tourism industries (characteristic activities) and grouping by main categories according to NACE Rev2 from the STATISTICAL BUSINESS REGISTER, 2018, ELSTAT

ECONOMIC ACTIVITY (2018)		NUMBER OF LEGAL UNITS	TURNOVER (in thousand €)	TOTAL EMPLOYMENT
Code NACE Rev. 2	DESCRIPTION			
4910	Passenger rail transport, interurban	*	*	*
4931	Urban and suburban passenger land transport	1,025	421,236	12,937
4932	Taxi operation	28,826	415,403	34,642
4939	Other passenger land transport n.e.c.	4,459	761,150	12,524
5010	Sea and coastal passenger water transport	1,665	1,264,865	10,591
5030	Inland passenger water transport	14	174	66
5110	Passenger air transport	89	2,887,242	4,048
5510	Hotels and similar accommodation	7,990	5,859,889	118,793
5520	Holiday and other short-stay accommodation	19,903	839,329	36,877
5530	Camping grounds, recreational vehicle parks and trailer parks	289	88,632	4,790
5590	Other accommodation	346	20,057	794
5610	Restaurants and mobile food service activities	39,594	3,939,354	243,105
5621	Event catering activities	333	147,024	4,658
5629	Other food service activities	3,170	196,799	7,947
5630	Beverage serving activities	35,194	1,770,142	173,232

7711	Renting and leasing of cars and light motor vehicles	1,753	669,911	6,132
7911	Travel agency activities	2,326	1,757,921	13,563
7912	Tour operator activities	1,034	1,071,691	7,903
7990	Other reservation service and related activities	206	20,101	674
9001	Performing arts	1,955	33,225	2,624
9002	Support activities to performing arts	2,149	143,841	9,062
9003	Artistic creation	3,041	58,194	4,225
9004	Operation of arts facilities	179	28,914	1,378
9102	Museums activities	168	21,539	1,174
9103	Operation of historical sites and buildings and similar visitor attractions	75	1,931	154
9104	Botanical and zoological gardens and nature reserves activities	40	6,390	449
9200	Gambling and betting activities	4,669	2,873,158	17,432
9311	Operation of sports facilities	592	81,324	4,388
9319	Other sports activities	1,099	168,466	4,155
9321	Activities of amusement parks and theme parks	143	23,618	1,104
9329	Other amusement and recreation activities	2,527	152,085	10,608
Total Greek economic activities		1.419.855	300,785,219	4,243,035
Tourism Industries		*164.853*	*25,723,607*	*750,029*
% Of tourism industries over total		*12%*	*9%*	*18%*

Source: ELSTAT
(*) confidential data

This preliminary analysis shows that the Greek tourism industries accounted for more than 18% of the country's total employment in 2018.

3.5 Main data gaps identified in data analysis

It is a fact that the country's economy is highly dependent on tourism activity, which places Greece in a very vulnerable position in the face of emergencies that may affect the mobility of people, a necessary factor for the development of tourism. These emergencies can be very diverse and very intense: natural disasters, climate change, wars and terrorism, or health crises such as COVID-19. Against this background, in-depth knowledge of the impacts of tourism on the economy and employment is a key competitive factor.

These are the main gaps identified during the evaluation:

1. ***Very long production and publication times*** *of the statistical data produced by ELSTAT: the latest available information on employment data is as of 2020.*
2. *There is* ***no official tool to measure the weight of tourism in the economy****, so it is difficult to quantify accurately the impact on GDP, revenue or employment. The Tourism Satellite Account provides an accounting framework that allows the measurement and international comparison of tourism's contribution to job creation, economic growth and wealth generation. Knowing the interrelationships between supply and demand in such a cross-cutting sector is complex, but it allows us to understand the economic implications of our actions in all their dimensions.*
3. *There is currently* ***no identification of tourism industries, their employment or turnover.***
4. ***The economic data available refers only to tourist accommodations and food and beverage establishments****, leaving out other high-volume and high-impact industries, such as tour operators and agencies, car rentals, cultural sites or events organizers.*
5. ***The statistical data available on the economy are scattered in the repositories of different institutions.***

4. Impact on Inbound Tourism

This chapter analyses the impact of COVID-19 on international tourist arrivals in Greece.

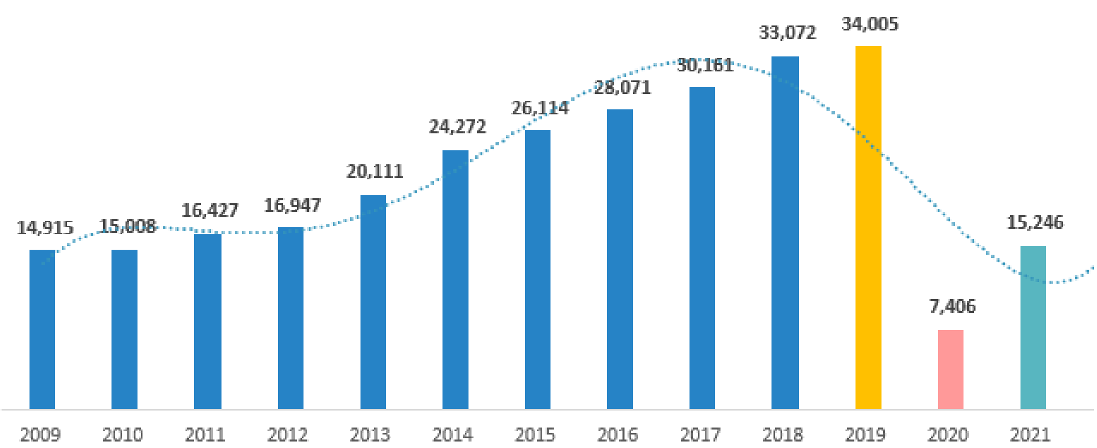
4.1 Arrivals, overnight stays and receipts

International Arrivals:

The total number of inbound travellers in 2019 was 34 million, a figure that in the last 10 years has experienced a compound average annual growth rate of 8.6%, receiving a 109% more international tourism in 2019 than in 2009.

The arrival of the pandemic in February 2020 reduced total arrivals for this year to 7,4 million, a 78.2% drop from 2019.

Figure 6. Evolution of international tourist arrivals 2009-2021



Arrivals (.000)	Greece
CAGR 2009-19	8.6%
var% 20-19	-78.2%
var% 21-19	-55.2%
var% 21-20	105.9%

Source: Bank of Greece.

The performance of international demand in Greece in 2020 is in line with that of other direct competitors. However, the performance in 2021 places the country in a situation of recovery considerably better than that of other direct competitor destinations such as Portugal or Spain.

Table 5. International arrivals comparison, main competitors.

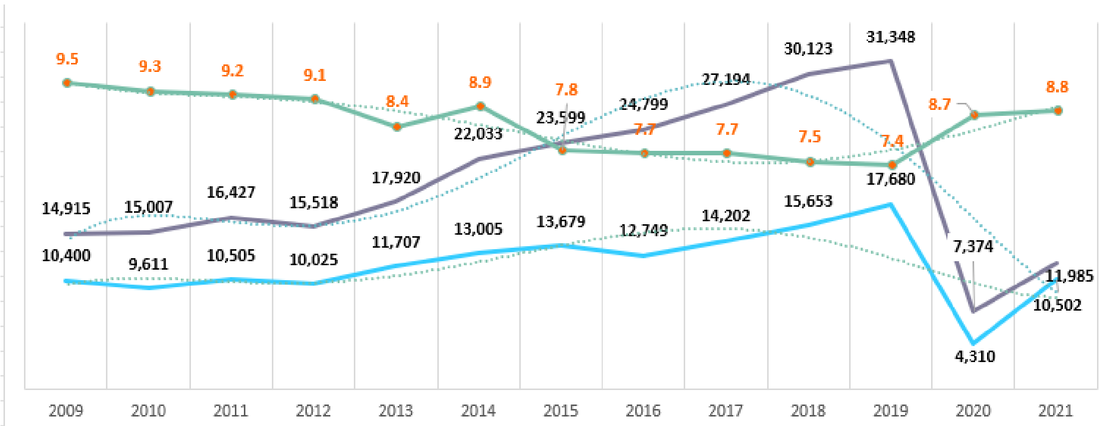
Arrivals	Greece	World	EU	Italy	Spain	Portugal	Turkey	Cyprus	Croatia
var% 20-19	-78.2%	-73%	-69%	-61%	-77%	-76%	-72%	-84%	-68%
var% 21-19	-55.2%	-71%	-62%	-59%	-63%	-64%	-45%	-51%	-39%

Source: UNWTO

Overnight Stays and Receipts:

Tourism receipts in 2020, monitored by the Bank of Greece, reached €4,318.8 million, 76% lower than 2019. 2021 recorded € 10,502 million in tourism receipts, a figure still 40% below 2019, in line with the number of arrivals and the increase in the average stay.

Figure 7. Evolution of total arrivals, average stay and receipts 2009-2021



	Arrivals (.000)	Average Length of Stay	Receipts (M €)
CAGR 2009-19	8.6%	5.1%	5.4%
var% 20-19	-78.2%	-72.4%	-75.6%
var% 21-19	-61.8%	-42.5%	-40.6%
var% 21-20	62.5%	108.8%	143.7%

Source: Bank of Greece

Despite the negative impact on international arrivals in 2020 and 2021, Greece's tourism receipts are performing better than other competing destinations in the region, thanks to a better and faster recovery of arrivals and an extension of the average length of stay, potentially induced by a proliferation of working-from-home, second residences and visitors who rented residences to spend the pandemic months away from home.

Table 6. Annual receipts comparison, main competitors (from USD)

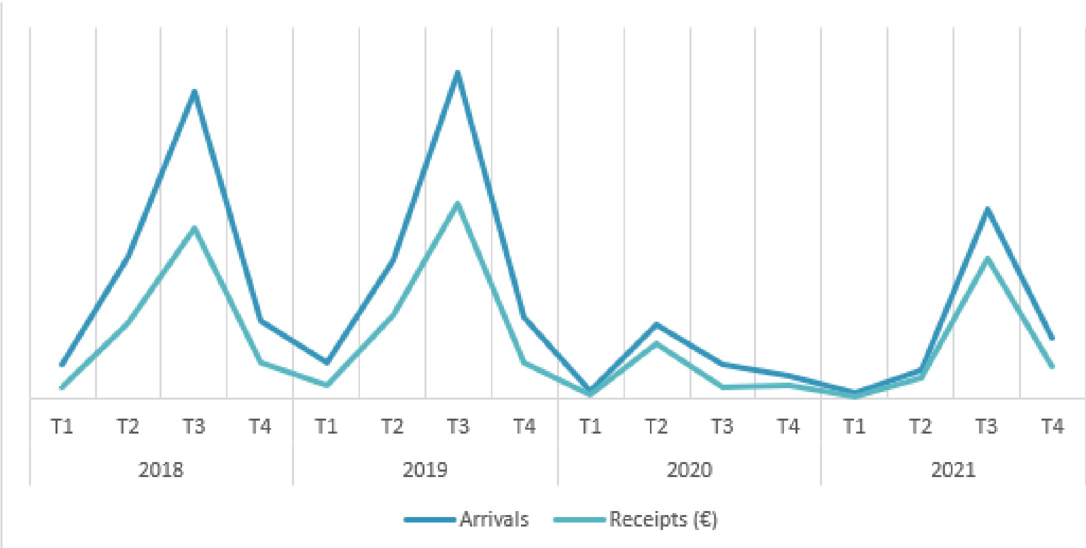
Receipts	Greece	Italy	Spain	Portugal	Turkey	Cyprus	Croatia
var% 20-19	-75.6%	-61%	-77%	-58%	-66%	-79%	-54%
var% 21-19	-41%	-51%	-59%	-46%	-30%	-51% (*)	-12% (*)

(*) Jan-Sep
Source: UNWTO

The contribution to the economy and employment of the tourism industry is crucial for the country, more than 50% of which is concentrated in the third quarter of the year, given the high seasonality.

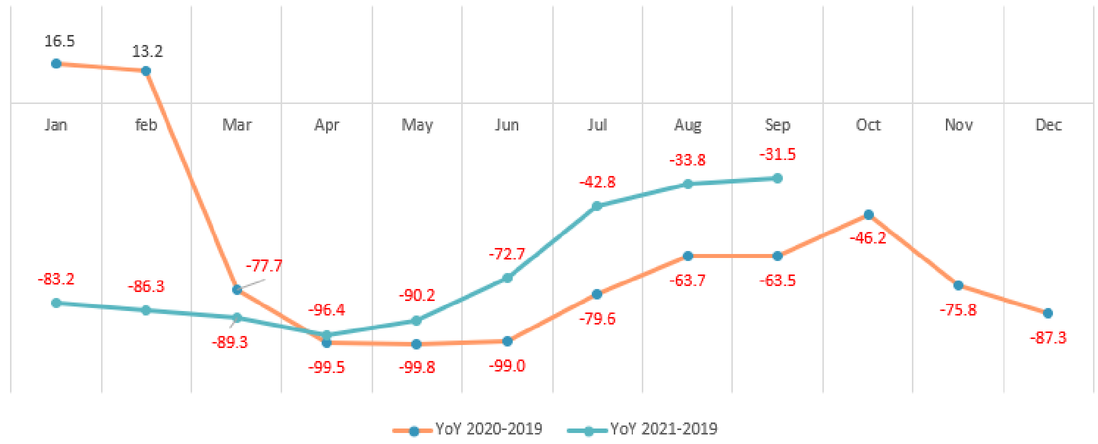
This concentration of activity in the summer months, and in the coastal geographical area and islands, generates very high stress and pressure on local infrastructures and systems, leading to problems of supply, employment demand and social pressure. 2021 maintained this pattern.

Figure 8. Distribution by quarters of tourism receipts, 2018-2021.



Source: Bank of Greece

Figure 9. Nights spent by non-residents in hotels, similar establishments and camping, by month (2019-2021)



	Nights spent by Non-residents Variations	
	YoY 2020-2019	YoY 2021-2019
Jan	16.5	-83.2
Feb	13.2	-86.3
Mar	-77.7	-89.3
Apr	-99.5	-96.4
May	-99.8	-90.2
Jun	-99.0	-72.7
Jul	-79.6	-42.8
Aug	-63.7	-33.8
Sep	-63.5	-31.5
Oct	-46.2	
Nov	-75.8	
Dec	-87.3	

Source: ELSTAT

4.2 Tourist expenditure

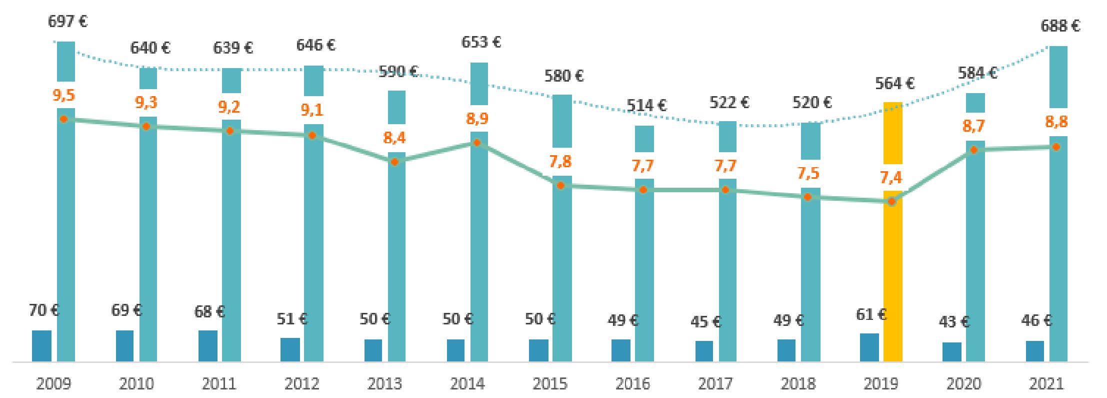
Average Stay and Tourist Expenditure at Destination:

The average stay of international tourists in Greece has been decreasing over the last decade, at a decreasing rate of -2.5% (average annual growth rate), from an average of 9.5 days per trip, to the 7.4 days recorded in 2019. This is a process shared with other destinations, which is mainly due to changes in traveler consumption patterns.

Despite the reduction in total tourism receipts in 2020 and 2021, the average length of stay of international tourists in Greece has increased by 1.3 nights compared to 2019, standing at 8.7 nights per tourist in 2020 and 8.8 nights in 2021, likely boosted by a proliferation of working-from-home, visitors with second residences in Greece and visitors who rented residences to spend the pandemic months away from home.

Although the daily expenditure recorded in 2020 and 2021 is lower than in previous years, the lengthening of the average stay has generated an increase in expenditure per trip, helping to offset total revenue.

Figure 10. Evolution of Average Duration of Stay and Average Expenditure per day and per trip 2009-2021



	Average Expenditure per Journey (€)	Average Expenditure per Overnight Stay (€)	Average Duration of Stay (overnight stays)
CAGR 2009-19	-2.1%	-1.3%	-2.5%
var% 20-19	3.5%	-30.1%	1.6%
var% 21-20	17.8%	8.7%	0.1%
var% 21-19	22%	-24.1%	1.7%

Source: Bank of Greece

The reduction of activities at the destination, due to restrictions, the high number of closed offers or the traveller's own decision, together with a drop in fares in many destinations to stimulate demand, has led to a reduction in spending. The phenomenon of non-residents who have decided to spend the lockdown or telecommute from their second homes in Greece or in tourist rental properties should be also considered. This factor explains the growth in average length of stay, while at the same time there is a decrease in average daily expenditure, as expenditure on accommodation and restaurants disappeared or was reduced.

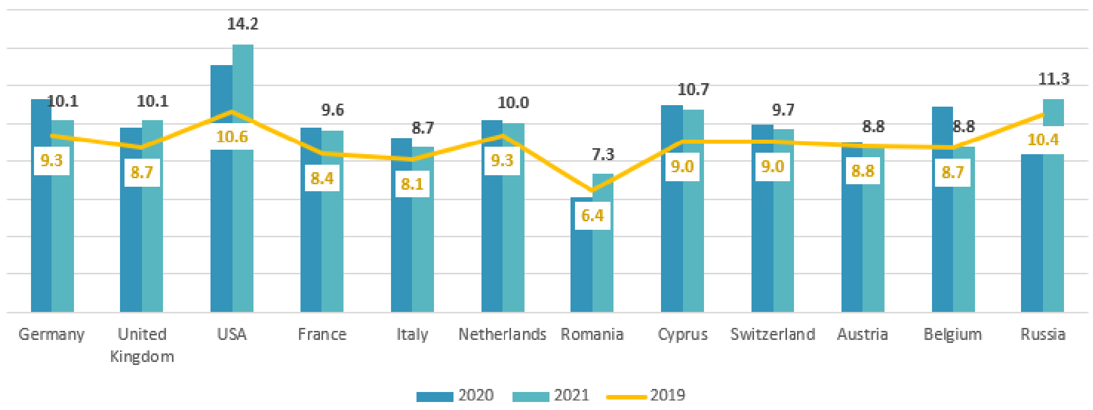
Table 7. Expenditure comparison, main competitors (from USD)

Expenditure	Greece	Italy	Spain	Portugal	Turkey	Cyprus	Croatia
var% 20-19	-71%	-65%	-69%	-46%	-75%	-58%	-57%
var% 21-19	-59%	-53%	-63%	-30%	-60%	-48% (*)	-47% (*)

(*) Jan-Sep
Source: UNWTO

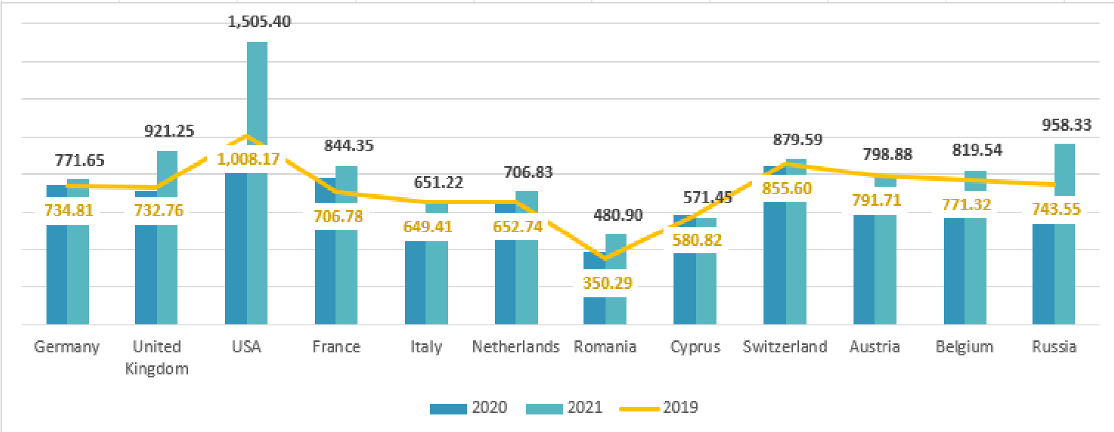
The analysis of the data by geographic markets of origin corroborates these interpretations: all countries show higher average stays in 2020 and 2021 than those recorded in 2019, which explains higher average expenditure per trip, although expenditure per day is lower.

Figure 11. Average duration of stay by country 2019-2020-2021



Source: Bank of Greece

Figure 12. Expenditure per tourist, per trip, by country (€) 2019-2020-2021



Source: Bank of Greece

4.2 Main data gaps identified in data analysis of Inbound Tourism

These are the main gaps identified during the evaluation:

1. ***Very long production and publication times*** *of the statistical data produced by ELSTAT: data for inbound tourism indicators in accommodations shows a delay of six months.*
2. ***The available statistical data on the economy are scattered in the repositories of different institutions.***

5. Impact on source markets

The impact on arrivals or spending in different geographic markets varies considerably. The main causal variables, in this case, are not market-related, but have to do with the development of the pandemic in each of these markets and the different mobility or security restriction measures established by each of them.

Forecasts 2022 were downgraded following the arrival of the Omicron variant and its rapid expansion in Europe, the main issuing region for Greece.

In addition to the COVID-19 factor, the war in Ukraine must be added as a new factor with a major impact on tourism. The conflict has led to the cancellation of flights with Russia and an increase in inflation in many important markets for Greece, which will reduce the economic capacity of households to travel. Also due to this war, it is foreseeable that a part of the population will change their travel behaviour and focus on destinations close to home, where they feel safer. The outlook is highly uncertain, and any forecast is difficult to make.

The figures show that the relative weight in this industry, and therefore in the country's economy, is critical in the case of some markets, which is why it is recommended that the priority segments and markets be studied in greater depth in order to have more and better information to interpret the performance and evolution of each.

On the other hand, market analysis needs to interrelate variables and be able to cross-reference information with greater sophistication, a task that, through a data intelligence system, would shorten times and bring the analysis closer to the interested agents.

5.1 Impact on source markets with a higher share of receipts

The table below shows different information available on the main source markets for Greece, selected not by number of arrivals, but by the volume of revenue they generate, since regardless of the volume of people, some markets have longer average stays or a higher level of expenditure. The table shows the 12 markets with more than a 2.5% share of total international tourism receipts. Based on this situation, the following tables analyse the variations in 2020 and 2021.

When assessing the impact of Covid-19 by market, it is interesting to note the interrelationships between the volume of arrivals and revenues. For example, almost a third of revenue is generated by just two markets, Germany and the United Kingdom, which together account for 24% of revenue generated per total arrivals. Also noteworthy are situations such as the US market which is ranked in the 7th place in terms of arrivals with 3.8% out of the total, but generates 6.7% of revenue; similarly, the Austrian market is ranked in the 22nd place in terms of arrivals, but in the 10th place in terms of revenue.

Table 13. Main indicators by source markets, 2019

2019	Receipts (€)	% of total receipts	Ranking (receipts)	Arrivals	% of total arrivals	Ranking (arrivals)	Average duration of stay	Expenditure per tourist (€)	
Country								daily	per trip
Germany	2,958,563,181	16.7%	1	4,026,286	12.8%	1	9.3	79.29	734.81
United Kingdom	2,564,176,154	14.5%	2	3,499,325	11.2%	3	8.7	84.49	732.76
USA	1,188,626,231	6.7%	3	1,178,989	3.8%	7	10.6	95.42	1,008.17
France	1,089,702,807	6.2%	4	1,541,793	4.9%	5	8.4	84.17	706.78
Italy	1,008,649,735	5.7%	5	1,553,173	5.0%	4	8.1	79.99	649.41
Netherlands	533,838,003	3.0%	6	817,847	2.6%	13	9.3	70.50	652.74
Romania	482,749,724	2.7%	7	1,378,128	4.4%	6	6.4	54.40	350.29
Cyprus	465,076,178	2.6%	8	800,719	2.6%	14	9.0	64.32	580.82
Switzerland	462,442,305	2.6%	9	540,488	1.7%	18	9.0	95.33	855.60
Austria	461,536,068	2.6%	10	582,962	1.9%	22	8.8	89.94	791.71
Belgium	453,320,775	2.6%	11	587,718	1.9%	15	8.7	88.26	771.32
Russia	433,400,371	2.5%	12	582,878	1.9%	17	10.4	71.20	743.55

Source: Bank of Greece

Comparing the indicators per market between 2020 and 2019, it is obvious how arrivals, and therefore tourism expenditure and revenue, are falling in all countries. Nevertheless, the average stay of those arriving is longer than ever, probably for the reasons mentioned above (second homes, people renting residences to spend the pandemic, work remotely).

Table 14. Main indicators by source markets, 2020-2019 variation

Var% 2020-2019	Receipts (€)	Arrivals	Average duration of stay	Expenditure per tourist (€)	
Country				daily	per trip
Germany	-61.7	-62.1	21.0	-16.7	1.1
United Kingdom	-70.5	-69.5	12.4	-14.4	-3.5
USA	-92.8	-91.0	23.5	-35.4	-19.9
France	-66.3	-69.6	16.3	-4.7	10.9
Italy	-78.4	-76.0	14.2	-21.2	-10.2
Netherlands	-68.3	-68.7	9.3	-8.0	0.9
Romania	-83.4	-85.2	-4.6	17.8	11.7
Cyprus	-63.7	-63.7	21.6	-17.5	0.0
Switzerland	-68.0	-67.7	10.3	-11.1	-1.7
Austria	-75.6	-72.6	2.1	-13.5	-11.7
Belgium	-79.6	-77.0	25.4	-29.5	-12.0
Russia	-96.7	-95.6	-10.6	-15.8	-25.1

Source: Bank of Greece

The recovery as depicted by the figures in 2021 compared to the baseline year, 2019, is remarkable. Revenue and arrivals are recovering in all major markets. 2021 continues to record, in all cases, higher average length of stays than in 2019, but not as high as in 2020. Lastly, in 2021, spending data, unlike in 2020, exceed the levels recorded in 2019.

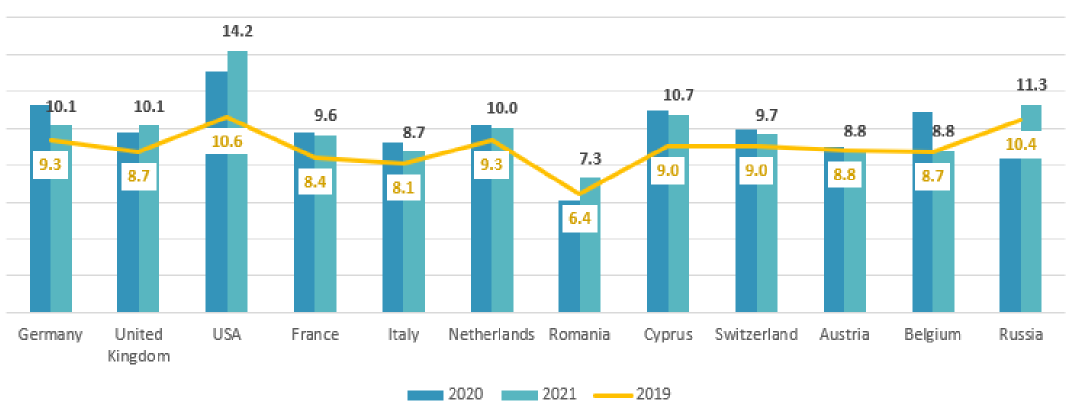
Data for 2021 show a particularly positive recovery in the case of the French market, with only a 9% difference in arrivals compared to 2019, and a 24% gap in arrivals, as well as the German market.

Table 15. Main indicators by source markets, 2021-2019 variation

Var% 2021-2019	Receipts (€)	Arrivals	Average length of stay	Expenditure per tourist (€)		Inflation (CPI) % (*)
Country				daily	per trip	
Germany	-21.7	-25.5	9.0	-4.0	5.0	5.1
United Kingdom	-42.8	-54.5	16.5	7.5	25.7	5.5
USA	-49.8	-66.4	34.0	11.1	49.3	7.9
France	-9.0	-23.8	14.3	4.4	19.5	3.6
Italy	-47.9	-48.1	7.9	-6.8	0.3	5.7
Netherlands	-21.2	-24.3	7.9	-0.0	8.3	6.2
Romania	-40.9	-56.3	14.1	21.1	37.3	8.5
Cyprus	-41.2	-42.8	19.0	-17.0	-1.6	6.6
Switzerland	-23.2	-25.3	7.5	-4.6	2.8	2.4
Austria	-27.0	-27.7	0.1	0.8	0.9	6.8
Belgium	-35.1	-38.9	0.6	6.1	6.3	8.3
Russia	-73.6	-79.5	8.3	19.5	28.9	9.1

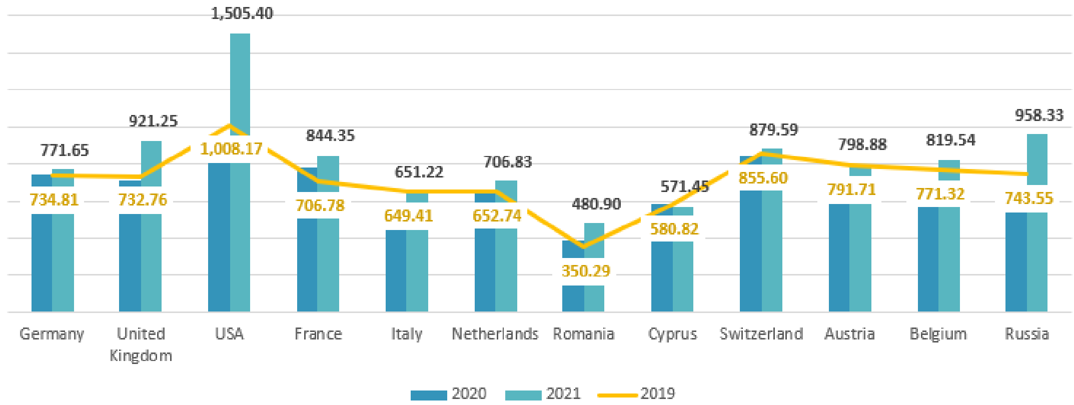
Source: Bank of Greece
(*) Feb. 2022

Figure 16. Average duration of stay, main source markets, 2019-20-21.



Source: Bank of Greece

Figure 17. Average expenditure per trip, main source markets, 2019-20-21.



Source: Bank of Greece

6. Impact on National Tourism

6.1 Impact on Domestic Tourism

As has been the case in other countries in the aftermaths of the pandemic due to travel restrictions and safety concerns, domestic demand has increased considerably, partly alleviating the fall in international demand. With the opening of borders in 2022 and thanks to high vaccination rates, foreign travel by Greek residents is expected to recover, but all indications are that high levels of domestic demand will continue to be maintained by the residents. It is also possible that this trend will be boosted by the war in Ukraine.

Domestic tourists made 4,3 million trips inside Greece in 2020, only 12,3% less than 2019.

Table 8. Tourist travel by residents within Greece 2019-2020

Domestic tourism	Trips	Overnight stays	Expenditure per tourist (€)	
			daily	per trip
2019	4,941,550	53,650,631	323.51	29.80
2020	4,331,856	52,729,191	325.18	26.71
YoY %	-12.3%	-1.7%	0.5%	-10.3%

Source: ELSTAT

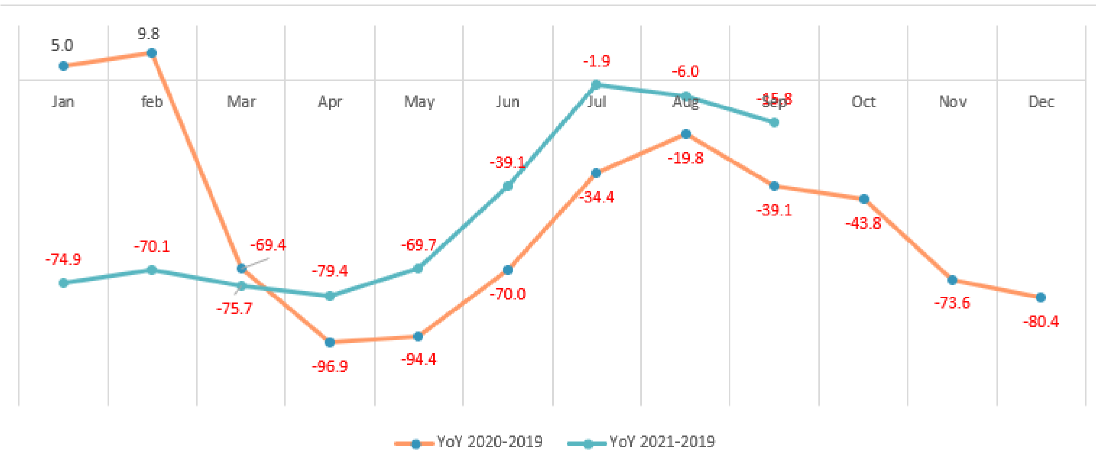
In relation to 2019, heightened pandemic restrictions in 2020 led to sharp declines in spending on accommodation, as well as on staying with family or friends, in order to restrict the spread of the virus.

Table 9. Tourist travel by residents within Greece by type of accommodation 2019-2020

Types of Accommodation	Hotels and similar establishments	Tourist campsites	Rooms for rent and rented houses, other rented accommodation	Own holiday home	Accommodation provided without charge by relatives and friends	Other non-rented accommodation
2019	1,087,195	64,357	834,528	1,218,935	1,706,644	29,891
2020	821,865	30,242	614,580	1,587,152	1,237,338	40,679
YoY %	-24.4%	-53.0%	-26.4%	30.2%	-27.5%	36.1%

Source: ELSTAT

Figure 18. Nights spent by residents in hotels, similar establishments and camping, by month (2019-2021)



	Nights spent Residents Variations	
	YoY 2020-2019	YoY 2021-2019
Jan	5.0	-74.9
feb	9.8	-70.1
Mar	-69.4	-75.7
Apr	-96.9	-79.4
May	-94.4	-69.7
Jun	-70.0	-39.1
Jul	-34.4	-1.9
Aug	-19.8	-6.0
Sep	-39.1	-15.8
Oct	-43.8	
Nov	-73.6	
Dec	-80.4	

Source: ELSTAT

The graph shows the year-on-year changes by month between 2020 and 2021 compared to the reference year, 2019.

Up to September 2021 when the latest data was available, the table with the nights spent by residents shows that after restrictions were lifted in June 2021, there was very little difference from the activity in 2019.

6.2 Impact on Outbound Tourism

As in other countries, foreign travel has been significantly reduced comparing 2020 with 2019.

Greek residents reduced their trips abroad by 70.4% in 2020 and by 74.2% in 2021.

Figure 19. Outbound trips by country of destination, 2019-2021.

DESTINATION COUNTRIES (trips)		2019	2020 (*)	YoY% 20-19	2021	YoY% 21-19
EU – 27 countries		**4,546.2**	**1,548.9**	**-65.9**	**1,337.1**	**-70.6**
	Euro area countries of which	2,205.1	800.8	-63.7	935.5	-57.6
	Austria	177.8	81.6	-54.1	60.6	-65.9
	France	189.2	61.8	-67.3	93.2	-50.7
	Germany	583.7	213.5	-63.4	224.8	-61.5
	Spain	168.9	40.0	-76.3	55.2	-67.3
	Italy	438.3	145.7	-66.8	183.6	-58.1
	Cyprus	239.0	129.6	-45.8	171.1	-28.4
	Netherlands	138.3	53.7	-61.2	68.7	-50.3
	EU countries excl. euro area of which	2,341.1	747.9	-68.1	401.6	-82.8
	Bulgaria	1,915.7	616.8	-67.8	212.2	-88.9
	Poland	67.9	20.2	-70.2	32.1	-52.7
	Czech Republic	58.1	11.2	-80.8	13.9	-76.0
Other countries of which		**3,747,3**	**881.1**	**-76.5**	**789.9**	**-78.9**
	Egypt	71.5	21.3	-70.1	36.9	-48.3
	United Kingdom	373.1	111.6	-70.1	112.5	-69.9
	USA	145.3	31.9	-78.0	30.2	-79.2
	Russia	60.4	6.5	-89.3	22.7	-62.4
	Turkey	1.091.5	118.5	-89.1	149.1	-86.3
TOTAL		**7,847.7**	**2,324.2**	**-70.4**	**2,026.2**	**-74.2**

Source: Bank of Greece
(*) Data for the period up to 15 March were estimated on the basis of the Border Survey. Data for the period 15 March-30 June were estimated on the basis of administrative and historical data.

The largest declines are to non-EU and long-haul destinations.

In 2021, although international trips have decreased, even compared to 2020, Greek citizens have opted for longer stays and therefore the average expenditure per trip increased.

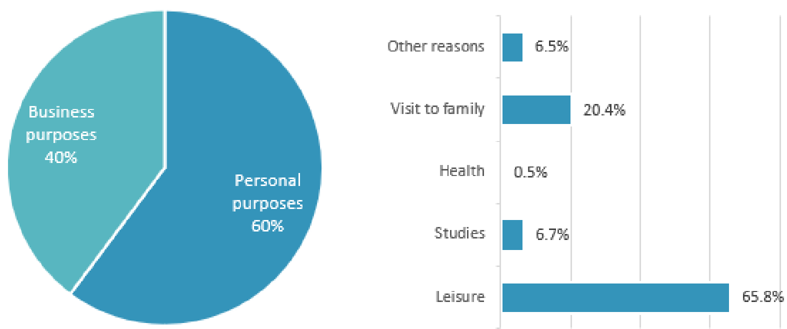
Table 10. Outbound travel 2019-2020

Year	Trips	Overnight stays	Payments (€)	Average Expenditure per Journey (€)	Average Expenditure per Overnight Stay (€)	Average Duration of Stay (in overnight stays)
2019	**7,847,723**	**44,915,947**	**2,743,847,062**	**350**	**61.0**	**5.7**
2020	2,324,214	18,558,720	792,865,088	341	43.0	8.0
YoY% 20-19	-70.4%	-58.7%	-71.1%	-2.6%	-29.5%	40.4%
2021	2,026,160	23,967,500	1,112,500,000	549	46	11.8
YoY% 21-19	-74.2%	-46.6%	-59.5%	56.9%	-24.6%	107.0%

Source: Bank of Greece

The exact reason for this significant increase in the average length of stay for international travel is unknown. However, the records show an increase Ffrom an average of 5.7 nights in 2019 to 8 nights in 2020 and 11.8 nights in 2021. This may be for work, family visits or other, perhaps non-tourism related, reasons.

Figure 20. Payments by purpose of travel and breakdown for personal reasons, 2019



Source: Bank of Greece

In 2019, 40% of tourism expenditure was related to business travel. Spending associated with business travel decreased by 71.6% in 2020 and by 60.9% in

2021 compared to 2019. Among personal reasons, leisure accounted for 65.8% of the total spending and 20.4% was for visits to relatives.

Spending on leisure travel showed a recovery, with 70.8% for 2020 and 58.5% in 2021.

6.3 Main data gaps identified in data analysis of National Tourism

These are the main gaps identified during the evaluation of National Tourism:

1. ***Very long production and publication times** of the statistical data produced by ELSTAT: data on domestic tourism is not available since September 2021.*
2. *The current ELSTAT statistical operation aimed at studying and characterizing the tourism demand of Greek residents - **Qualitative Characteristics of resident tourists (Vacation Survey)** - has an annual periodicity and is of vital use for various calculations, but it is **not an agile tool** for rapid assessment of other issues. Moreover, it does not make it possible to go into depth on some indicators, as well as qualitative aspects.*
3. ***The available statistical data are scattered in the repositories of different institutions.***

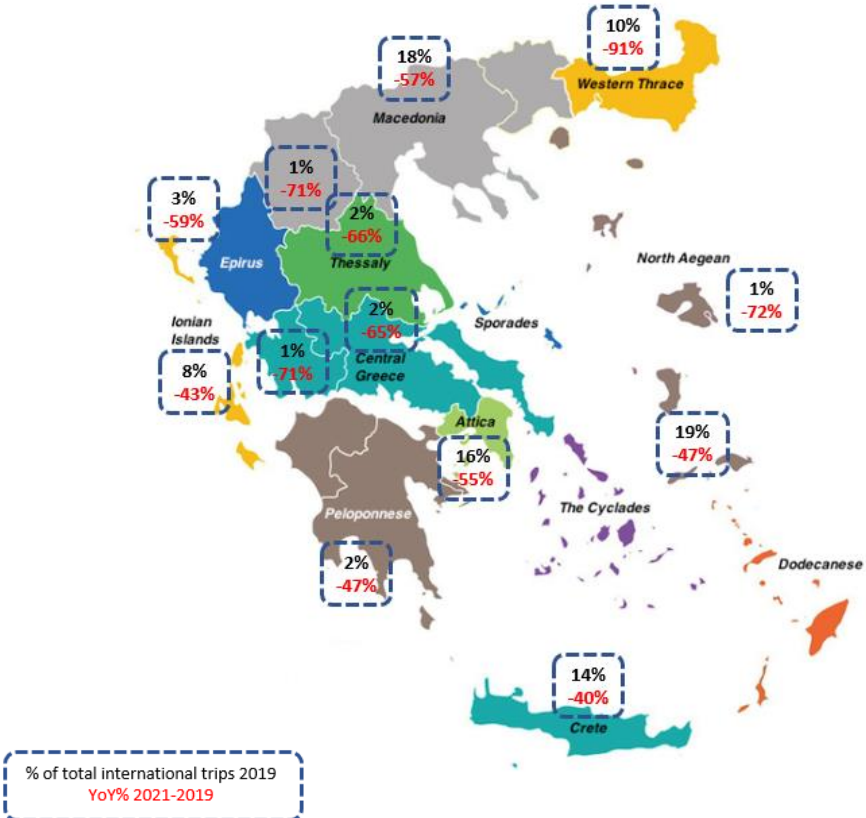
7. Impact on national destinations

This chapter analyses the regional impact of international arrivals in Greece.

With respect to domestic tourism, there is currently no data available on residents' travel at the regional level.

7.1 Impact on international arrivals by region

Figure 21. Greek regions EU NUTS 2: % of total international trips in 2019 and 2019- 2021 % variation.



Source: Map developed by UNWTO, data of Bank of Greece

The map shows the distribution of international trips hosted in each region in 2019, and the year-on-year change in 2021 compared to that year.

Some regions, such as Crete or the Ionian Islands, showed a better recovery in 2021. Regions such as Attica or the southern Aegean islands, popular tourist destinations, also show better recovery rates than other regions.

Figure 22. Foreign visits (not visitors) to each region 2020-2019 variation[4].

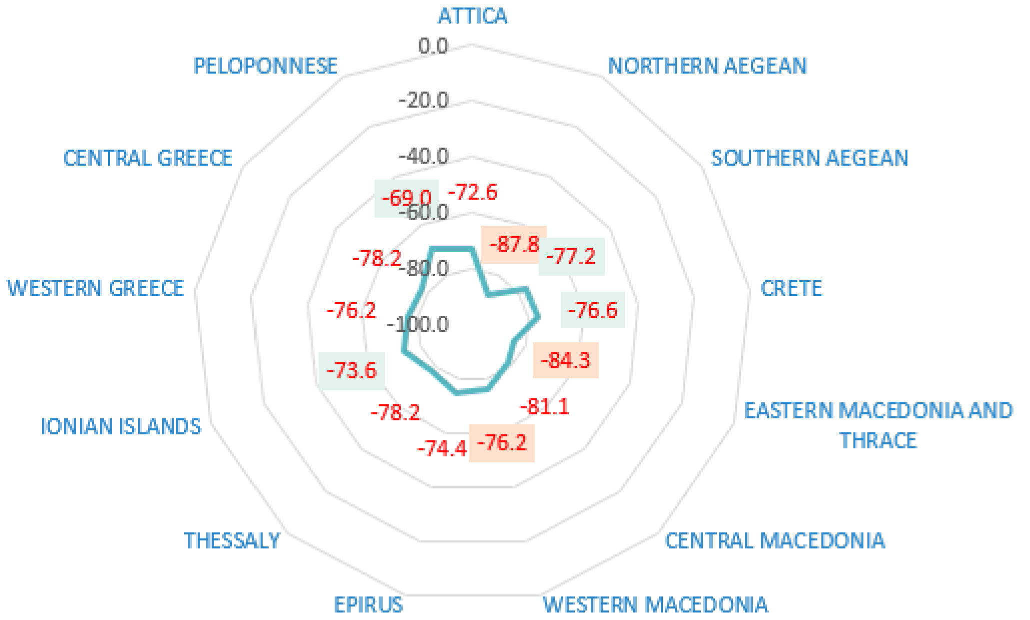
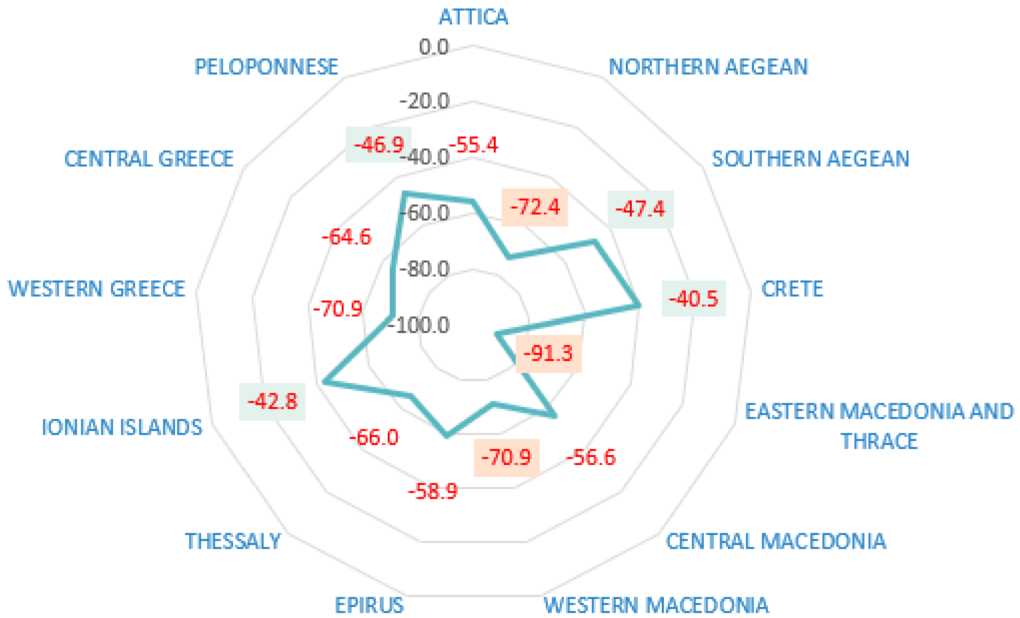


Figure 23. Figure 20. Foreign visits (not visitors) to each region 2021-2019 variation.

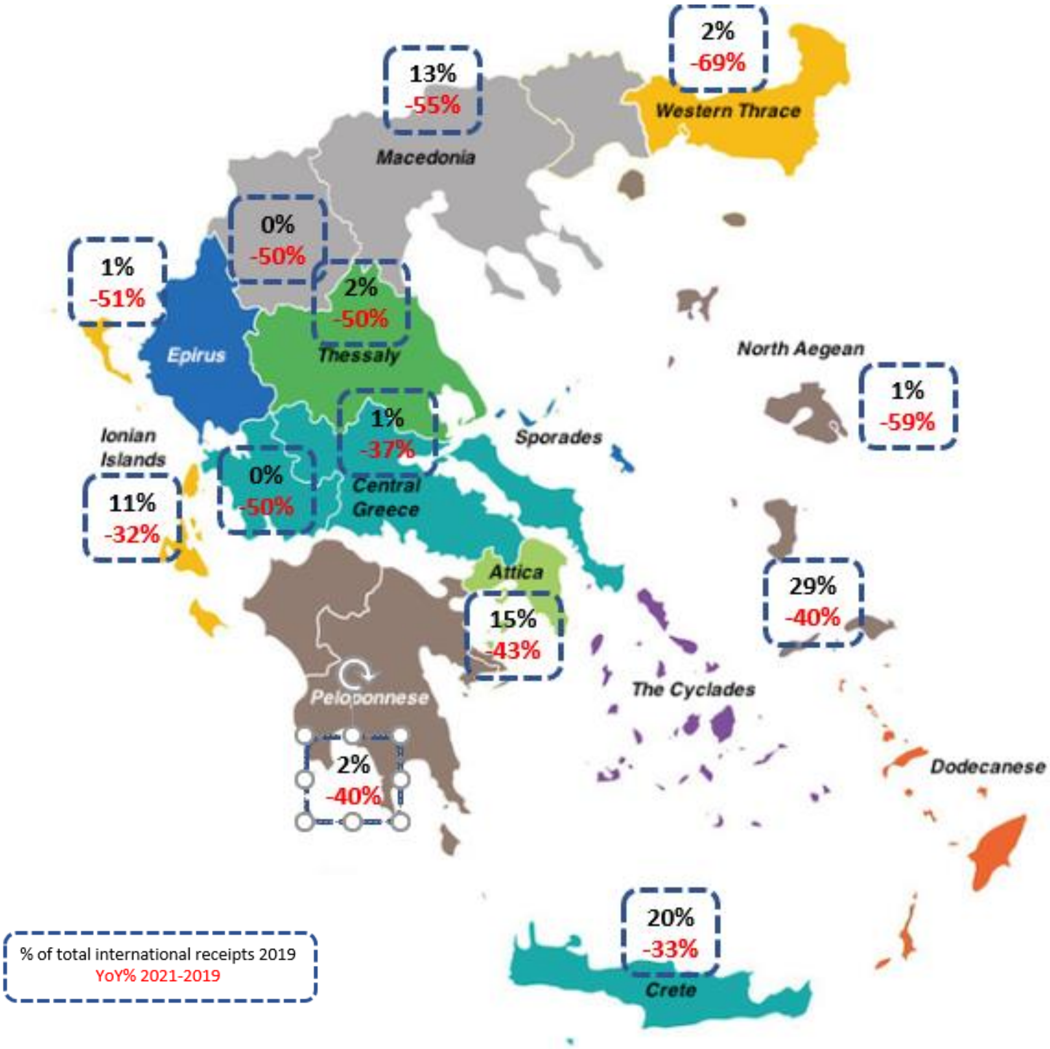


Source: Bank of Greece

[4] *The table shows the number of visits (not visitors), since travellers may visit more than one region during their trip. These figures do not include cruise data collected from sources other than the Border Survey.*
2020: Data for the period up to 15 March were estimated on the basis of the Border Survey. Data for the period 15 March-30 June were estimated on the basis of administrative and historical data.

7.2 Impact on international receipts by region

Figure 24. Greek regions EU NUTS 2: % of total international receipts in 2019 and 2019- 2021 % variation.



Source: Map developed by UNWTO, data of Bank of Greece

In terms of tourism receipts, the most popular regions in international markets demonstrated, in general, a better recovery in 2021 than other less popular destinations.

Figure 25. International travel receipts by region, 2020-2019 variation.

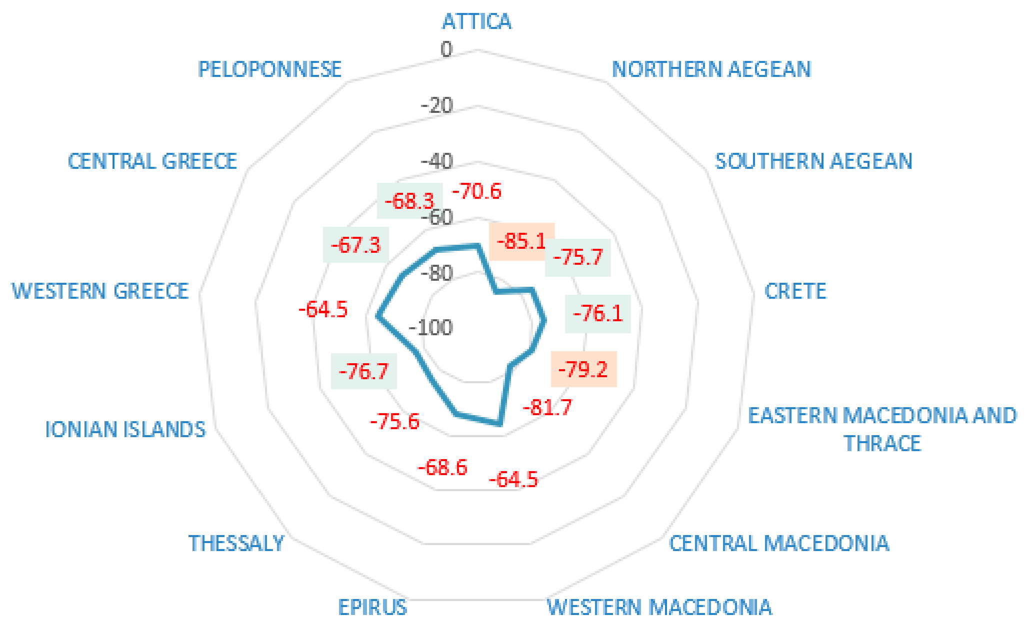
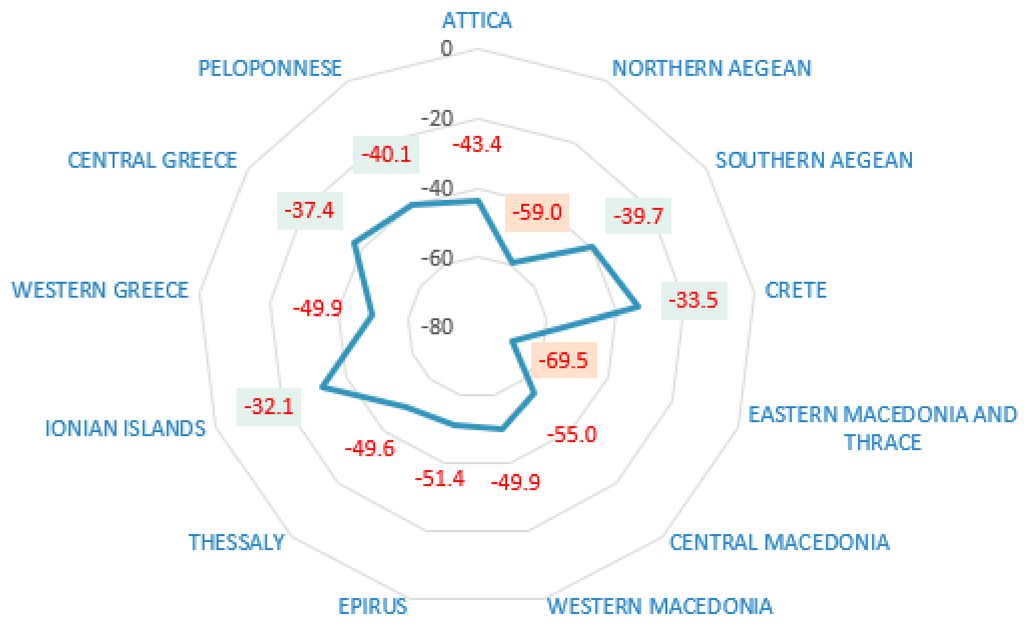


Figure 26. International travel receipts by region, 2021-2019 variation.



Source: Bank of Greece

As can be seen in the graphs, the data for 2021 is substantially better than those for 2020 and point to a recovery path, if there are no new negative developments going forward.

7.3 Main data gaps identified in data analysis of impact on national destinations

These are the main gaps identified during the evaluation:

1. *The current ELSTAT statistical operation aimed at studying and characterizing the tourism demand of Greek residents -* ***Qualitative Characteristics of resident tourists (Vacation Survey)*** *- has an annual periodicity and is of vital use for various calculations, but it is* ***not an agile tool*** *for rapid assessment of other issues.*
2. *Moreover, the Vacation Survey* ***does not collect information on domestic tourism by region.*** *The role of domestic tourism in the tourism industry is crucial, whether it takes place in second homes or in market accommodations, so it is of great interest to know the final destinations and the frequency of trips of this segment.*
3. ***The available statistical data are scattered in the repositories of different institutions.***

8. Impact on Tourism Industries

As mentioned in the chapter on the tourism economy, data on the so-called tourism industries as a whole is very limited in Greece at present, which allows only a partial analysis. A detailed study of the impact of COVID-19 on these industries would firstly require identifying these industries and then isolating employment or turnover data.

This chapter analyses the impact on the tourist accommodation sector, airports and visitable museums, which is a small part of the industry directly associated with tourism activity.

8.1 Accommodation

Greece had 9971 tourist establishments in 2019, with a capacity of 856,347 beds. Interestingly, the data for 2020 recorded an increase.

Table 11. Accommodation capacity

Accommodation Offer	Number of Establishments			Number of Bed places	Number of Pitches
	Hotels and similar establishments	Tourist campsites	Total	Hotels and similar establishments	Tourist campsites
2019	9,971	297	**10,268**	856,347	23,626
2020	10,052	305	**10,357**	869,250	24,482
YoY %	0.8%	2.7%	**0.9%**	1.5%	3.6%

Source: ELSTAT

However, as in other countries, a significant part of the accommodation supply did not have the financial capacity to withstand the shutdown and has closed permanently, although the data on these shutdowns in Greece is not available.

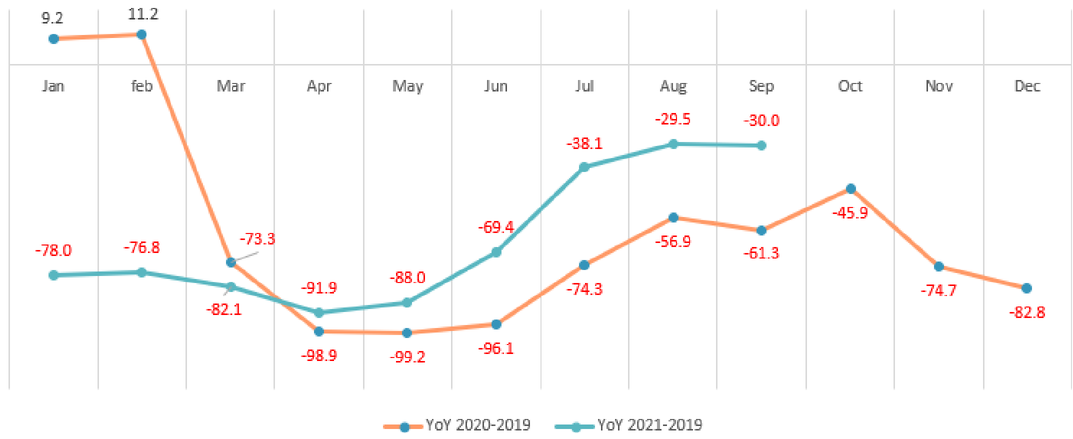
Table 12. Hotel occupancy rate by regions

Regions	Occupancy of bed places (%)		
	2019	2020	YoY %
Greece Total	48.7	29.6	-19.1
Anatoliki Makedonia, Thraki	34.2	19.3	-14.9
Kentriki Makedonia	43.9	22.8	-21.1
Dytiki Makedonia	15.3	12.8	-2.5
Ipeiros	29.8	20.6	-9.2
Thessalia	31.9	20.6	-11.3
Sterea Ellada	26.8	18.4	-8.4
Ionia Nisia	57.3	41.5	-15.8
Dytiki Ellada	33.0	22.7	-10.3
Peloponnisos	31.8	21.8	-10
Attiki	48.5	22.8	-25.7
Voreio Aigaio	35.0	20.1	-14.9
Notio Aigaio	57.7	40.1	-17.6
Kriti	57.2	36.3	-20.9

Source: ELSTAT

Hotel occupancy in 2020 was down 19.1% compared to 2019 for the national supply as a whole, a figure that varies considerably by region. Attica and Crete recorded the largest occupancy declines, and Western Macedonia and Epirus the regions with the smallest decline.

Figure 27. Nights spent in hotels, similar establishments and camping, by month (2019-2021)



	Nights spent Variation	
	YoY 2020-2019	YoY 2021-2019
Jan	9.2	-78.0
feb	11.2	-76.8
Mar	-73.3	-82.1
Apr	-98.9	-91.9
May	-99.2	-88.0
Jun	-96.1	-69.4
Jul	-74.3	-38.1
Aug	-56.9	-29.5
Sep	-61.3	-30.0
Oct	-45.9	
Nov	-74.7	
Dec	-82.8	

With the arrival of summer, in 2021, occupancy data begun to improve substantially.

Source: ELSTAT

8.2 Greek airports activity[5]

This section gives the main figures on the impact of COVID-19 on Greek air traffic. The data refers to flights of all types and not to passengers, for the years 2020 and 2021,

[5] *Data provided by Eurocontrol (https://www.eurocontrol.int/about-us), a pan-European, civil-military organisation dedicated to supporting European aviation.*

with respect to the reference year 2019. The data refers to air traffic for all airports in the country.

- Total flights cancelled since 1 March 2020: 350,000 flights.
- Current flight status: 1,020 daily flights or -47% vs 2019 (7-day average).
- Busiest airline: Aegean with 234 average daily flights (-41% vs. 2019).
- Busiest airport: Athens with 483 average daily flights (-35% vs. 2019).

Table 13. Traffic composition 2020-2021 vs 2019.

Top 5 Airports (08-06-2021 - 14-06-2021)		
Airport	**Average daily flights (Dep/Arr)**	**% vs 2019**
Athens	483	-35%
Iraklion/Nikos/Kazantzakis	126	-51%
Makedonia	112	-43%
Diagoras	85	-55%
Mikonos	75	-19%

Top 5 Aircraft Operators (08-06-2021 - 14-06-2021)		
Aircraft Operator	**Average daily flights**	**% vs 2019**
Aegean Airlines	234	-41%
Sky Express	117	-3%
Ryanair	81	-39%
TUI fly	46	-67%
Smartwings	26	-61%

Top 5 City Pairs (08-06-2021 - 14-06-2021)		
Country pair	**Average daily flights**	**% vs 2019**
from/to GREECE	334	-22%
from/to GERMANY	134	-41%
from/to FRANCE	49	-48%
from/to UNITED KINGDOM	48	-80%
from/to ITALY	45	-59%

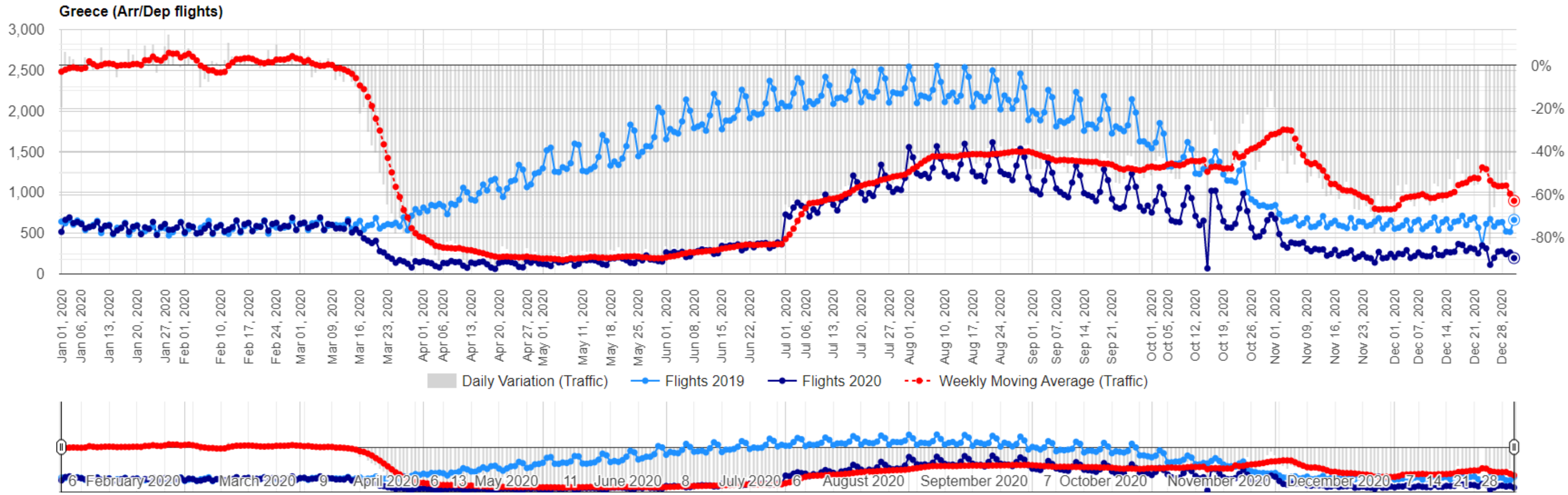
Flight Category (08-06-2021 - 14-06-2021)		
Flight Category	Average daily flights	% vs 2019
Internal	315	-25%
International	686	-54%
Round Robin Flights	19	+65%

Aircraft Category (08-06-2021 - 14-06-2021)		
Aircraft Category	Average daily flights	% vs 2019
Narrow body	640	-56%
Commuter (TurboP)	162	-33%
Other	160	+36%
Regional Jet	30	-35%
Wide body	22	-52%
Very Large Aircraft	6	-36%

Market Segment (08-06-2021 - 14-06-2021)		
Market Segment	Average daily flights	% vs 2019
Traditional Scheduled	521	-44%
Lowcost	226	-62%
Business Aviation	139	+45%
Charter	75	-67%
Other Types	23	+41%
Military	21	-31%
All-Cargo	15	-30%

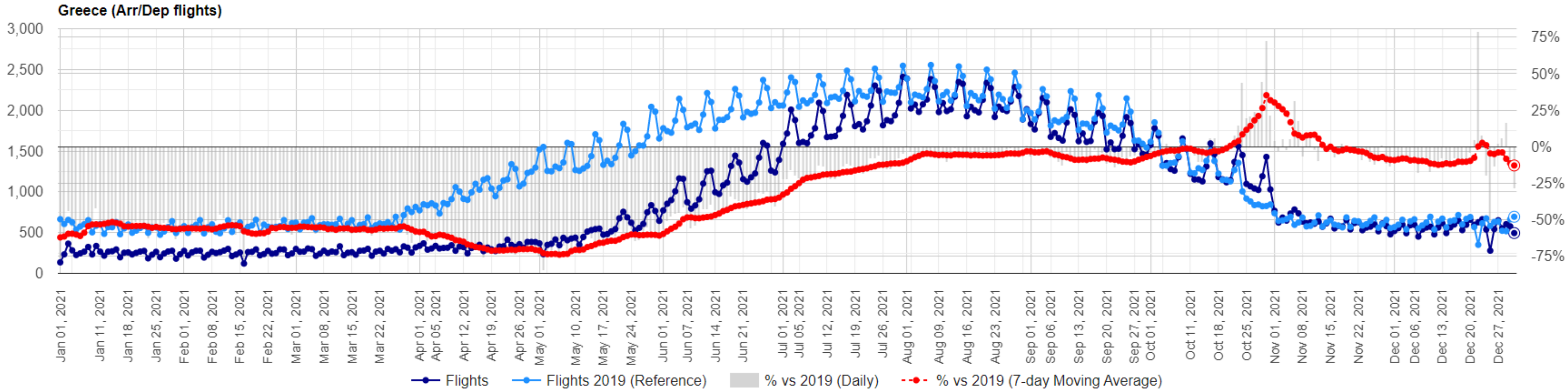
Source: Eurocontrol

Figure 28. Greece daily air traffic variation (arrival/departure flights) 2019-2020



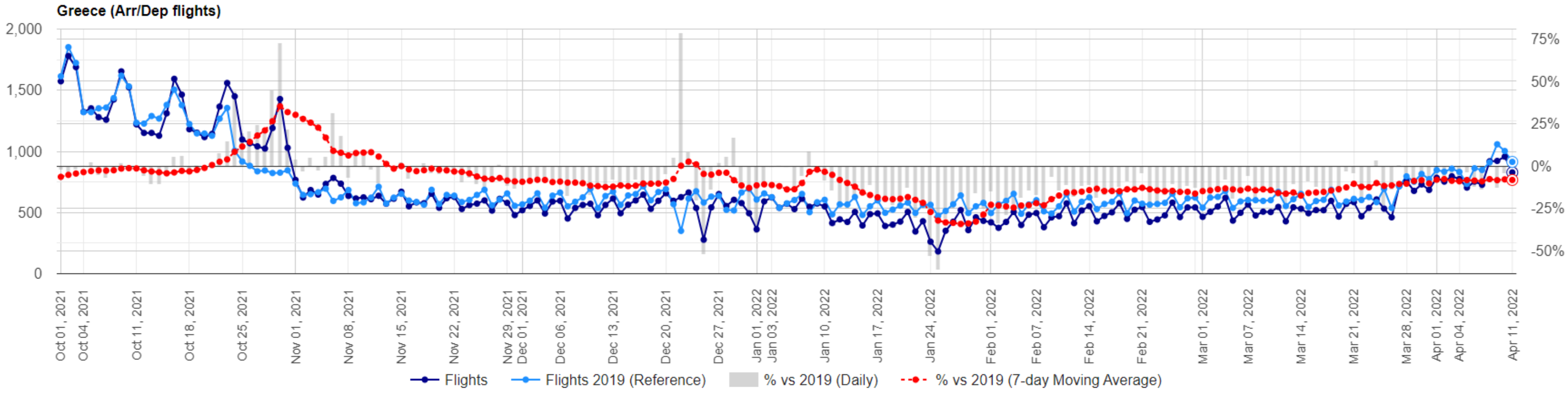
Source: Eurocontrol

Figure 29. Greece daily air traffic variation (arrival/departure flights) 2019-2021



Source: Eurocontrol

Figure 30. Greece daily air traffic variation (arrival/departure flights) 2019-2022

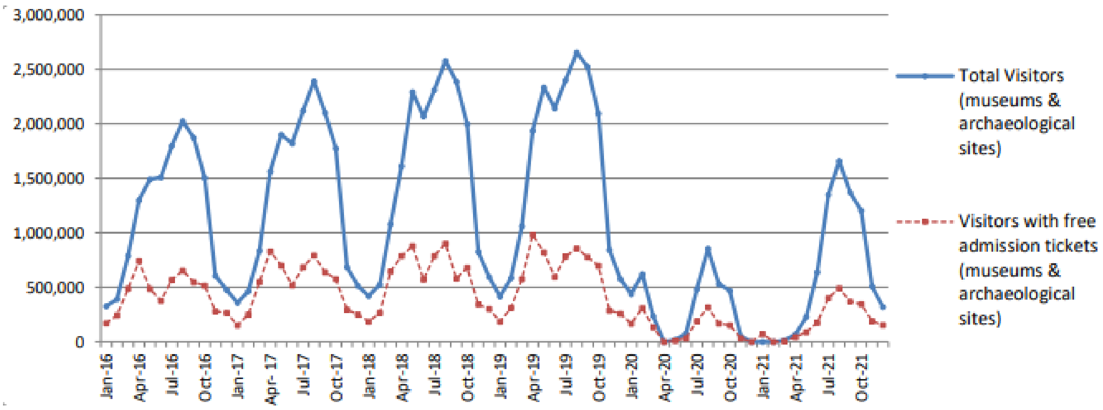


Source: Eurocontro

8.3 Museums and Archaeological Sites[6]

In December 2021, museums operated fully, whereas during December 2020 they remained closed, given the fact that in the framework of the preventative measures against the COVID-19 pandemic, the operation of the museums was gradually suspended from 1 November 2020 until 13 May 2021.

Figure 31. Visitors of Museums and Archaeological sites (January 2016 – December 2021)



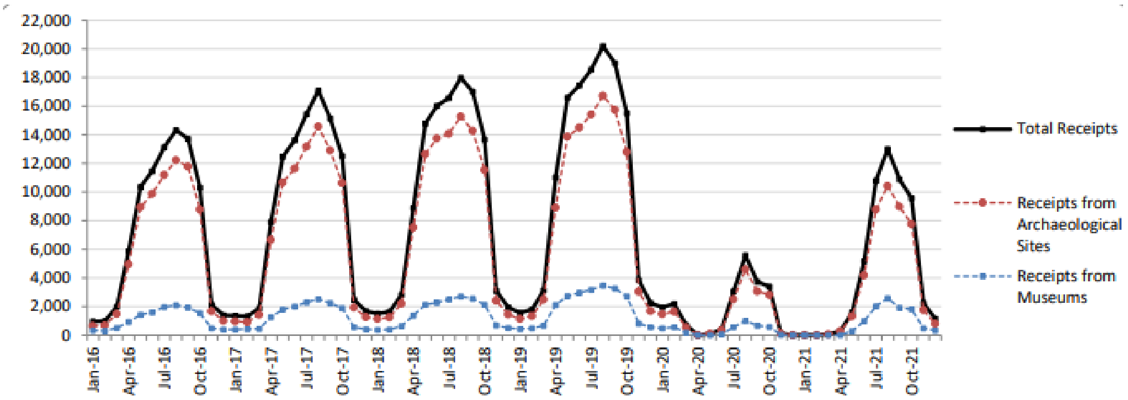
Source: ELSTAT

During the twelve-month period from January to December 2021, compared to the corresponding period of 2020, an increase of 86% was observed in the number of visitors of museums and an increase of 52.9% was recorded in the number of free admission visitors.

As regards Archaeological sites, during the twelve month period from January to December 2021, compared to the corresponding period of 2020, an increase of 98.7% was recorded in the number of visitors, while an increase of 49.6% was observed in the number of free admission visitors.

[6] *Since the data on Museums and Archaeological Sites are not currently available for download in Excel, the tables published by ELSTAST are shown directly.*

Figure 32. Receipts from Museums and Archaeological Sites (January 2016 – December 2021)



Source: ELSTAT

Greek cultural venues with ticket sales, recover around 65% of visitors and revenues in 2021 compared to 2019.

8.4 Main data gaps identified in data analysis of impact on museums and archaeological sites

These are the main gaps identified during the evaluation:

1. ***Very long production and publication times*** *of the statistical data produced by ELSTAT: latest accommodation data available is for September 2021.*
2. *There is currently* ***no identification of tourism industries, their employment or turnover.***
3. ***The economic data available refers only to tourist accommodations and food and beverage establishments****, leaving out other high-volume and high-impact industries, such as tour operators and agencies, car rentals, cultural sites to visit or activity companies.*

4. ***Significant deficiencies were found in the Registry of Tourism Companies*** *of the Ministry of Tourism (MITE). The current registry does not cover the entire universe and is not properly updated.*

5. ***No data is available on the number of companies currently operating in the market, or on the number of tourism companies that have ceased operations.***

6. ***The available statistical data are scattered in the repositories of different institutions.***

9. Data gaps and areas of improvement

Overall, the analysis and conclusions of this report serve as the basis for a second complementary document *-Impact Monitoring Guidelines-* where specific improvement measures are suggested based on the conclusions of this report, as well as other information studied.

Figure 33. Table-summary of problems identified and possible areas for improvement.

10. Annex A: Statistical sources

CODE	SOURCE	INSTITUTION/PROVIDER	PERIODICITY AND LAST DATA AVAILABLE
1. Inbound tourism			
1.1	**Border Survey** Since 2002, the Bank of Greece conducts a monthly sample survey at the country's major entry/exit points (Border Survey), for the purpose of collecting information to estimate travel expenditure. The Border Survey in fact comprises two separate surveys: – The 'Travel Receipts Survey', aimed at estimating the travel expenditure of non-residents during their stay in Greece; and – The 'Travel Payments Survey', aimed at estimating the travel expenditure of Greek residents during their travels abroad.	**Bank of Greece**	Monthly (Jan 2022)
1.2	**Arrivals and nights spent at hotels, similar establishments and tourist campsites Survey** – Census survey. Each establishment fills in a questionnaire, for every month that it is in operation. It is mandatory for all hotels, similar establishments and tourist campsites to participate in the survey. – Reference unit: all establishments (hotels, similar establishments and tourist campsites) that are registered in the Hellenic Chamber of Hotels. – The questionnaires are mostly submitted electronically, via ELSTAT's electronic application "Xenios Zeus" or, alternatively, for establishments that this is not possible, in paper form. – The survey is based on the Statistical Register of hotels, similar establishments and tourist campsites, which is updated during the year, so that data refer	**ELSTAT**	Monthly (2020)

	to the actual number of accommodation establishments and campsites that are in operation. – By regions (NUTS 2) – Variables: o Nº of arrivals (travellers) resident and non-resident (by country of residence) o Nº of nights spent o Occupancy rate of bed places		
2. Domestic tourism			
2.1	**Household Budget Survey** The survey analyses the expenditure and purchases of Greek households according to their composition and characteristics, and the evolution of expenditure on some concepts can be studied in relation to the tourism economy, such as tourist accommodation, purchase of holiday packages or means of transport, among others.	**ELSTAT**	Yearly (2020)
2.2	**Survey on the Qualitative Characteristics of Resident Tourists (Vacation Survey)** The purpose of the survey is to collect data on the characteristics of resident tourists, tourist expenditure and contribution of several socio-demographic groups in tourism and their behaviour, with the aim of drawing national and European policy in the tourism sector. – Sample survey on households – Variables: o Nº of tourists o Nº of trips o Nº nights o Expenditure o Expenditure by type of expenditure o Main purpose of the trip o Main destination of the trip (Outbound) o Gender o Age o Main mode of transport o Type of accommodation	**ELSTAT**	Yearly (2020)

2.3 (1.2)	**Arrivals and nights spent at hotels, similar establishments and tourist campsites Survey**	**ELSTAT**	Monthly (2020)
3. Outbound tourism			
3.1 (1.1)	**Border Survey**	**Bank of Greece**	Monthly (Jan 2022)
3.2 (2.1)	**Household Budget Survey**	**ELSTAT**	Yearly (2020)
4. Employment			
4.1	**Labour Force Survey** Persons employed in subsectors of tourism industries: all types of tourist accommodation establishments – food and drink service providers – Passenger transport – Travel agency, tour operator and other reservation service and related activities	**ELSTAT**	Quarterly (2021)
5. Tourism industries			
5.1 (1.2)	**Arrivals and nights spent at hotels, similar establishments and tourist campsites Survey**	**ELSTAT**	Monthly (2020)
5.2	**Capacity and occupancy of tourist accommodation establishments (Arrivals and nights spent at hotels, similar establishments and tourist campsites Survey)** Hotels and similar establishments Short-stay establishments Tourist campsites – arrivals of guests – nights spent by guests – occupancy rate	**ELSTAT**	Monthly (2020)
5.3	**Enterprises in Accommodation and Food Service Activities (Experimental statistics)** The statistical data presented have been compiled on the basis of the linking and processing of primary data from the following sources:	**ELSTAT**	Monthly (Jan 2022)

	○ The final Statistical Business Register of ELSTAT of the reference year 2018. ○ Administrative transactions files (tax etc) of the reference years 2019 2020, 2021 and 2022. In particular the following primary data have been used per source: ○ Active enterprises and the economic activity class from the final Statistical Business Register of the reference year 2018. ○ Income data from administrative transaction files of the years 2019 2020, 2021 and 2022. It is noted that the geographical classification of enterprises is based on the location of the enterprise's headquarters		
5.4	**MITE (Registry of Tourism Enterprises)** Data of tourism enterprises by category and by year, provided to MoT throughout each of the 14 regional tourism offices.	**Ministry of Tourism**	yearly (2021)
5.5	**Performance of Greek Hotels** The annual survey of the Research Institute for Tourism records the impact of the pandemic to the main figures of hotel businesses in 2021. Stratified proportional sampling, sample and population: n=1.122/ N=10.050. – % of hotels operating – % Occupancy rate by month – € Average room rate (By type: year-round operating hotels, seasonal hotels) – € Turnover (By type: year-round operating hotels, seasonal hotels; by category: from 1 to 5 * and by services provided: accommodation, F&B, conferences, others) – N° of employees – N° of employees graduated of tourism schools – Hotel renovation maintenance expenses – % Coverage of financial needs by financial schemes – Expectations on turnover, contracts	**Research Institute for Tourism (RIT)**	yearly (2021)
6. Economy			

6.1	**Tourism Turnover Index** Evolution of the turnover of the enterprises in Accommodation (division 55 of NACE Rev. 2 classification) and Food and Beverage Service Activities (division 56 of NACE Rev. 2 classification). – Monthly basis – By regions (NUTS 2) – Sources: o The final Statistical Business Register of ELSTAT of the reference year 2018 o Administrative transactions files (tax etc) of the reference years 2019 2020, 2021 and 2022 – The geographical classification of enterprises is based on the location of the enterprise’s headquarters	**ELSTAT**	Quarterly (Jan 2022)
6.2	**Greek BoP – Travel Item** The balance of payments is a statistical table that records transactions between residents and non-residents, irrespective of the transaction currency, during a specified time period.	**Bank of Greece**	monthly and yearly (2021)
7. Other sources			
7.1	**Survey on Museums and Archaeological Sites Attendance** The survey is a census survey conducted on a monthly basis on the basis of data transmitted by the Archaeological Receipts Fund (ARF), as well as by the Acropolis Museum, the National Gallery-Alexandros Soutsos Museum, the Benakis Museum and the National Historical Museum. The survey data refer to the number of visitors and the receipts from the tickets sold in the Museums and Archaeological sites of the country. The survey covers 172 museums and 154 archaeological sites. Some archaeological sites have a flat rate ticket valid for both the archaeological site and the relevant museum. These archaeological sites together with their museum are considered one statistical unit. Source: Archaeological Receipts Fund (ARF) of the Ministry of Culture and Sports	**ELSTAT**	Monthly (Nov 2021)

	By regions (NUTS 3) – Variables: o Nº of visitors o Receipts (€)		
7.2	**Enterprises Under Suspension of Operation (Experimental statistics)** It provides statistical data on enterprises classified in the economic activity classes that were or are under suspension of operation on the basis of state order in March 2020, due to the pandemic of the corona virus disease 2019 (COVID-19), (relevant link from the Ministry of Finance webpage, available only in Greek, KAD of closed enterprises). These statistical data have been compiled on the basis of the linking and processing of primary data from the following sources: - The final Statistical Business Register of ELSTAT, of the reference year 2018. - Administrative registers of enterprises, of the reference year 2020. - Administrative transactions files (tax, etc) of the reference years 2019, 2020, 2021 and 2022. In particular, the following primary data have been used per source: - Active enterprises and the economic activity class from the final Statistical Business Register of the reference year 2018. - The population of legal units (TIN: Tax Identification Number) classified in KAD (Codes of Activity) with temporary suspension of operation, from administrative registers of enterprises, of year 2020. - Income data from administrative transactions files of the years 2019, 2020, 2021 and 2022. It has to be noted, that after the process of matching the KAD codes to the classes of the Statistical Classification of Economic Activities (NACE Rev. 2), for which a total (referring to all the underlying activities) or a partial suspension of operation is applied for the enterprises that are classified to them on the basis of state order in March 2020, follows the linking with the data of the final Statistical Business Register of the year 2018, which is the main reference framework for the current Press Release. This linking leads to different results as regards the share of enterprises under suspension of operation per economic activity class NACE Rev.2, (mainly, because there are enterprises that were operating during the	**ELSTAT**	Monthly (Jan 2021)

	whole or part of the year 2018 and they were closed from 2019 onwards). After the application of the same methodology, the number of enterprises that were under suspension of operation in November 2020, on the basis of state order, has been defined (corresponding links, available only in Greek, Government Gazette B /4899/06.11.2020 and List of KAD under suspension of operation). Statistical classifications. For the economic activities, the European statistical classification of economic activities NACE Rev. 2 is used. It is noted that an automatic transition from KAD to codes of NACE Rev. 2 classification was applied on the basis of valid correspondence rules.		
7.3	**Statistical Business Register** It is the basic tool for preparing and coordinating surveys and the main source of information for statistical analysis of business population and business demography, as well as for the identification and establishment of statistical units. Number of legal units, turnover and employment per four-digit branch of economic activity in the whole Country is available for 2018. Update is expected in April 2022 for reference year 2019.	**ELSTAT**	Yearly (2018)
7.4	**Structural Business Statistics (SBS)** Structure, conduct and performance of businesses by NACE activity classification (Section I: accommodation and food services sector). The SBS survey results are the most important data source for the compilation of GDP. – Nº of enterprises – Turnover – production value – value added at factor cost – Nº of employees – salaries and personnel costs, etc.	**ELSTAT**	yearly
7.5	**Passenger and flights traffic** – domestic, per month – international, per month	**Athens International Airport (AIA)**	monthly (Feb 2022)
7.6	**AEROSTAT** (**Passenger Survey**) – Nº of passengers (IATA)	**Athens Internation**	yearly (2020)

	– Intention to travel – Main purpose of trip – Safety perception in AIA – Socio-economic profile – Trip length – Sources of information – Means of ticket booking – Reservation period – Frequency of travelling – Nationality – Residence	**al Airport (AIA)**	
7.7	**Border Control Point (BCP) Reports** N° of European citizens and the number for third country nationals (TCNs) for both entry and exit from the Schengen area that passed through their BCP.	**Hellenic Police – Border Protection Department**	monthly
7.8	**Bulletin of Statistical Data** Air traffic statistics for all Greek airports. – N° of passengers per month (arrivals, departures, transit) – N° of flights per month	**Hellenic Civil Aviation Authority – Data Division**	yearly (2018)
7.9	**Tourism Observatory** Weekly survey (panel) to address different topics.	**Research Institute for Tourism (RIT)**	weekly / yearly
7.10	**Passenger Maritime Transport Statistics** Piraeus and Thessaloniki Port Authorities as well as other domestic Port Authorities and shipping companies. – number of passengers that begin or end a domestic/international – journey (excluding a ship cruise journey) in a Greek Port – ▪ number of passengers that begin or end a cruise journey in a Greek Port	**ELSTAT**	monthly

7.11	**Pilot TSA 2017** The TSA-pilot project has laid the basis for the routine-wise implementation of TSA in Greece. The documentation of the project indicates weaknesses and gaps of the TSA relevant database and proposes measures to be taken in order to amend the database.		2015 (year of reference)

European Bank for Reconstruction and Development | UNWTO World Tourism Organization | HELLENIC REPUBLIC MINISTRY OF TOURISM

11. Annex B: COVID-19 measures adopted in Greece[7]

INTERNAL TRAVEL

Level 1	Coverage	Level 2	Level 3	Start Date	End Date	Targets	Notes
	National	Travel advice	Not applicable	21 Mar 2020	25 May 2020	General population	21/03/2020 Permanent residents and supply trucks woul be allowed to travel to the Greek islands,; ...
	National	Travel restrictions	Cordon sanitaire	17 Mar 2020	03 May 2020	Asylum seekers;Migrants;Refugee	Aegean islands/Lesbos island: Additional restrictions remain in place until further notice in migran...
	National	Travel restrictions	Other	04 May 2020	18 May 2020	General population	Can circulate freely within the prefecture.
	National	Travel restrictions	Cordon sanitaire	02 Apr 2020	05 Jul 2020	Asylum seekers;Migrants;Refugee	Migrant camps in Ritsona and Malakasa have been place under full sanitary isolation. No one is allo...
	National	Travel restrictions	Cordon sanitaire	07 Nov 2020	13 May 2021	General population	The movement of the population is restricted between regional units. There are exceptions such as wo...
	National	Travel restrictions	Cordon sanitaire	16 Mar 2020	06 Apr 2020	Person residing in the affected area	Two villages in Western Macedonia, Damaskinia and Dragasia, were quarantined after several cases amo...

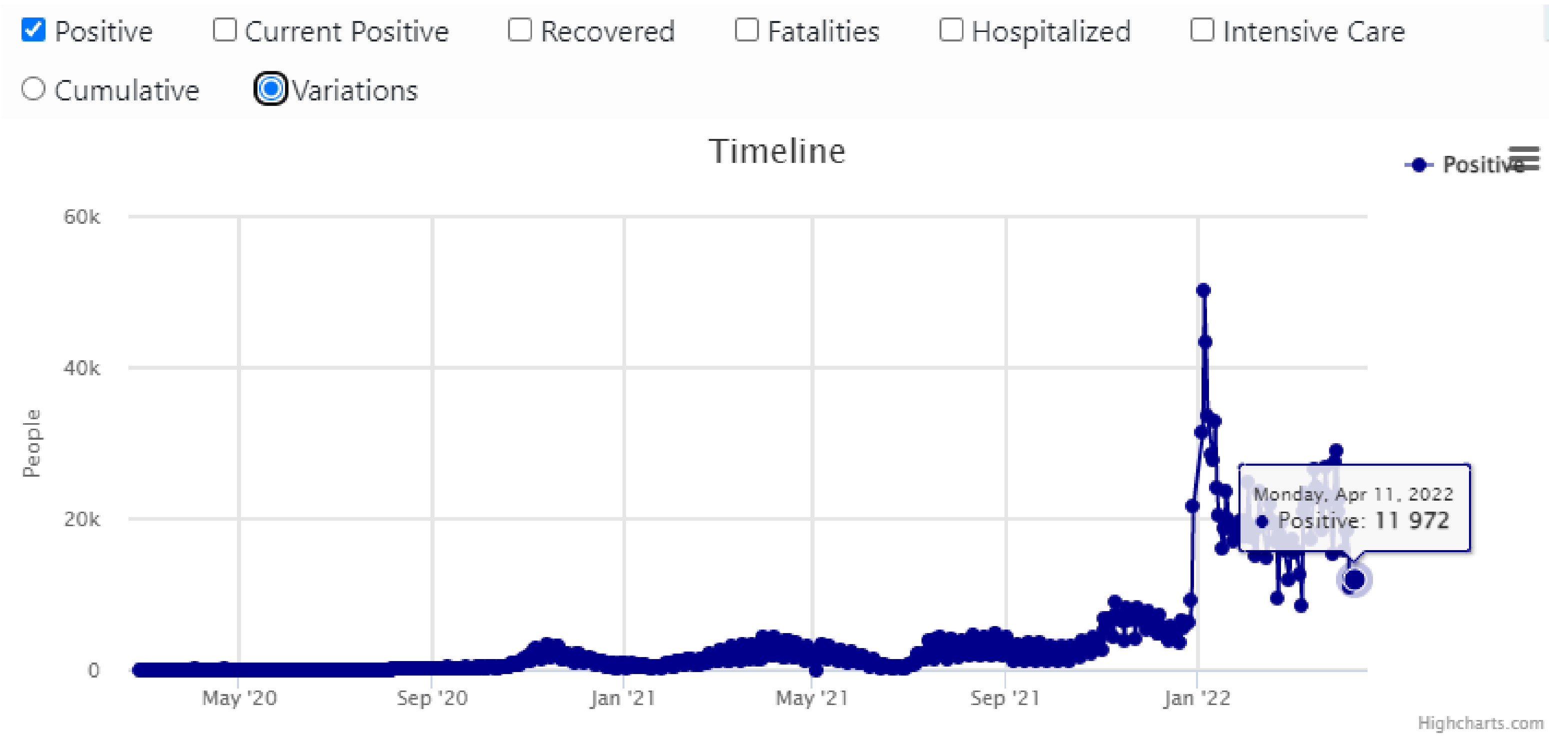
[7] *Source: European Commission: https://covid-statistics.jrc.ec.europa.eu/RMeasures*

INTERNATIONAL TRAVEL

Level 1	Coverage	Level 2	Level 3	Start Date	End Date	Targets	Notes
	National	Total border closure	Not applicable	17 Mar 2020	28 Feb 2022	Travellers	17/03/20: Entry ban for individuals other than citizens from countries in the European Union, Europe...
	National	Quarantine for international travellers	Not applicable	18 Dec 2020	18 Apr 2021	Travellers	All travellers entering Greece from 18/12/2020 to 07/01/2021 are required to self-quarantine for 3 d...
	National	Border screening	PCR/rapid antigen testing	24 Jul 2020	18 Apr 2021	Travellers	Before entering the country, all travellers must complete a Passenger Locator Form. Temporary testin...
	National	Total border closure	Not applicable	15 Mar 2020	15 Jul 2020	Travellers	land: Albania, North Macedonia, and Turkey. Air: Italy and Spain; Sea: Italy.
	National	Quarantine for international travellers	Not applicable	19 Mar 2020	30 Jun 2020	Travellers	Mandatory quarantine for 14 days for returning travellers coming from affected areas.; until 14/06/2...
	National	Border screening	Other	14 Jul 2020	09 Aug 2020	Travellers	Temporary measure due to increased COVID-19 cases in the Balcans.
	National	Total border closure	Not applicable	22 Mar 2021		Travellers	Traveling from Albania, Turkey, and North Macedonia is allowed for essential reasons only.; 14/05/20...
	National	Travel advice	Not applicable	28 Jan 2020	26 Feb 2021	Travellers	Update travel information MoH website.
	National	Quarantine for international travellers	Not applicable	19 Apr 2021		Travellers	As of 19 April 2021, the countries from which entry is allowed without the requirement for quarantin...
	National	Border screening	PCR/rapid antigen testing	19 Apr 2021		Travellers	proof of a negative SARS-CoV-2 PCR certificate is not required for travellers who have completed the...

12. Annex C: COVID-19 statistics for Greece[8]

Figure 34. Positive cases daily variations 2019-2022 in Greece.



[8] *Source: European Commission: https://covid-statistics.jrc.ec.europa.eu/Home/Dashboard*

Figure 35. Fatalities daily variations 2019-2022 in Greece.