



Panel Survey Results



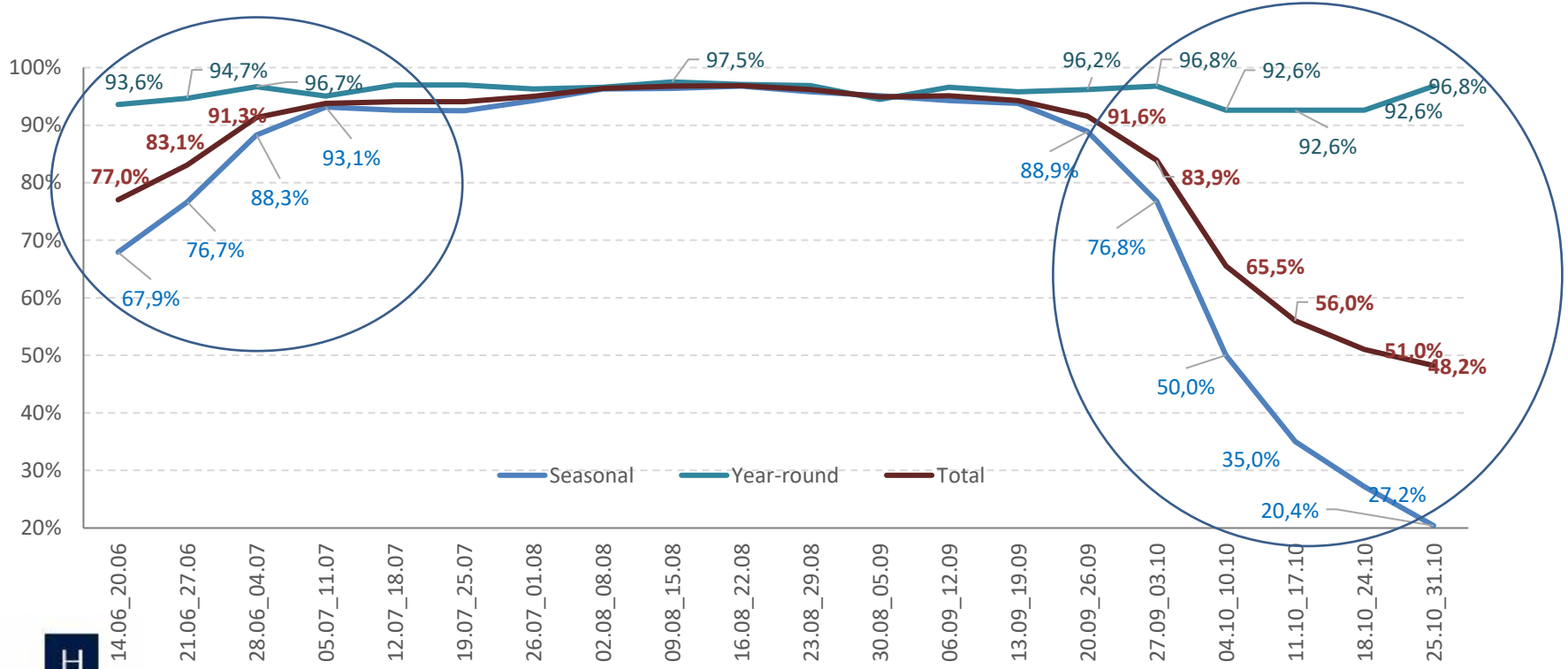
*Weekly Evolution of Room and Occupancy Rates
June-October 2021*



ΕΠΙΧΕΙΡΗΣΙΑΚΟ ΠΡΟΓΡΑΜΜΑ ΕΥΡΩΠΑΪΚΗ ΕΝΩΣΗ
ΕΛΛΗΝΙΚΗ ΕΠΙΧΕΙΡΗΣΙΑΚΗ ΟΜΟΣΠΟΝΔΙΑ ΟΤΕΛ

| | |
|-------------------------------|--------------------------------------|
| SURVEY TITLE | Weekly Panel Survey 2021 |
| ASSIGNING BODY | Hellenic Chamber of Hotels (HCH) |
| CONDUCTING BODY | Research Institute for Tourism (RIT) |
| REFERENCE PERIOD | 06-10/2021 |
| SURVEY TIME PERIOD | 14 July – 31 October 2021 / weekly |
| DELIVERABLE DATE | 1 November 2021 |
| POPULATION | Greek Hotels |
| STATISTICAL UNIT | Hotel Unit |
| REGISTRY | HCH Registry |
| CLASSIFICATIONS | NACE, Hotel Categories |
| SAMPLING METHOD | Panel |
| WEIGHTING | Triple(Category,Region,Size) |
| SAMPLE/POPULATION SIZE | Panel size = 450 / N = 10.050 |
| COLLECTION METHOD | CAWI |

Weekly Evolution of Hotel Opening, 2021



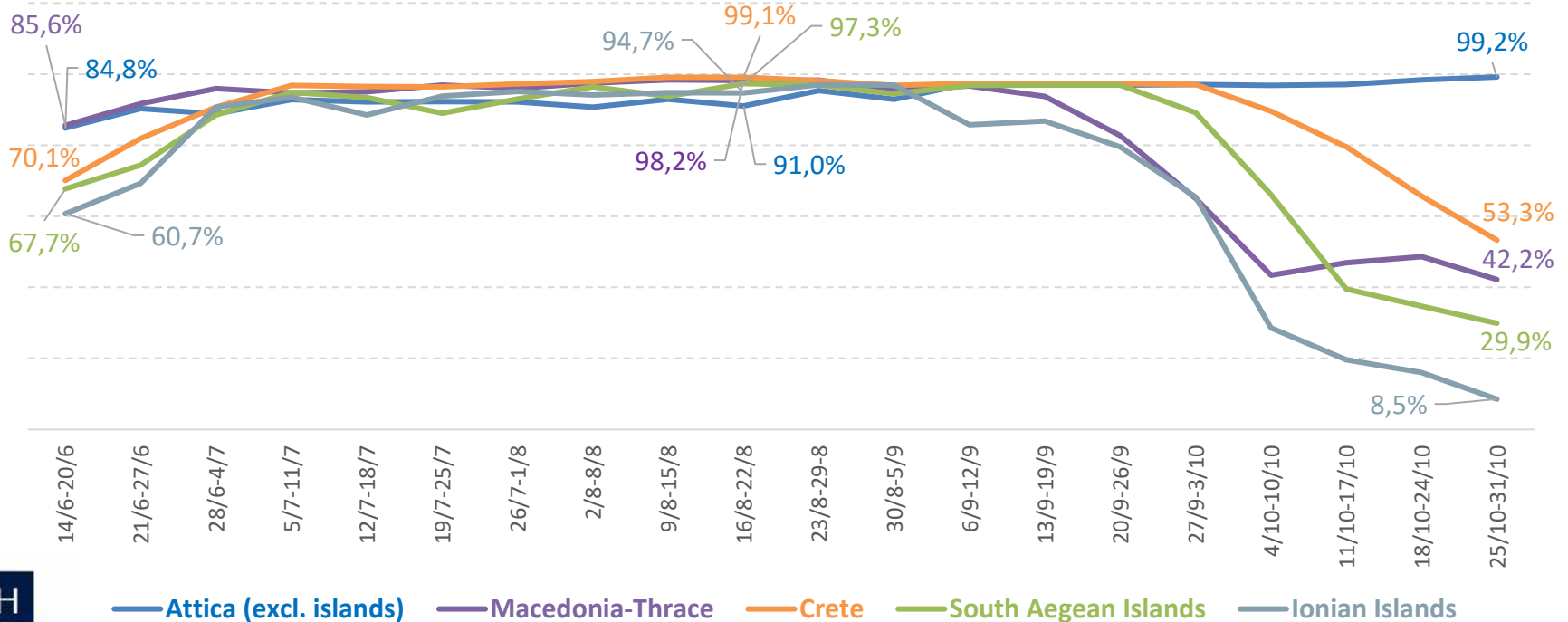
Ratio of Open Hotels in Selected Regions, 2021 (first weeks of the survey)

| Region | 14/06 – 20/06 | 21/06 – 27/06 | 28/06 – 04/07 | 05/07 – 11/07 |
|-----------------------------|---------------|---------------|---------------|---------------|
| Attica | 84,8% | 90,3% | 88,8% | 92,8% |
| Macedonia - Thrace | 85,6% | 91,7% | 95,9% | 94,7% |
| Crete | 70,1% | 81,9% | 90,7% | 96,8% |
| South Aegean Islands | 67,7% | 74,4% | 88,5% | 94,9% |
| Ionian Islands | 60,7% | 74,4% | 90,7% | 93,5% |
| Country Total | 77,0% | 83,1% | 91,3% | 93,8% |

Ratio of Open Hotels in Selected Regions, 2021 (last weeks of the survey)

| Region | 27/9 - 03/10 | 4/10 – 10/10 | 11/10 – 17/10 | 18/10 – 24/10 | 25/10 – 31/10 |
|----------------------|--------------|--------------|---------------|---------------|---------------|
| Attica | 97,1% | 96,8% | 97,1% | 98,4% | 99,2% |
| Macedonia - Thrace | 65,0% | 43,4% | 46,9% | 48,6% | 42,2% |
| Crete | 97,1% | 89,6% | 79,5% | 65,7% | 53,3% |
| South Aegean Islands | 89,2% | 66,1% | 39,5% | 34,7% | 29,9% |
| Ionian Islands | 65,4% | 28,6% | 19,6% | 16,0% | 8,5% |
| Country Total | 83,9% | 65,5% | 56,0% | 51,0% | 48,2% |

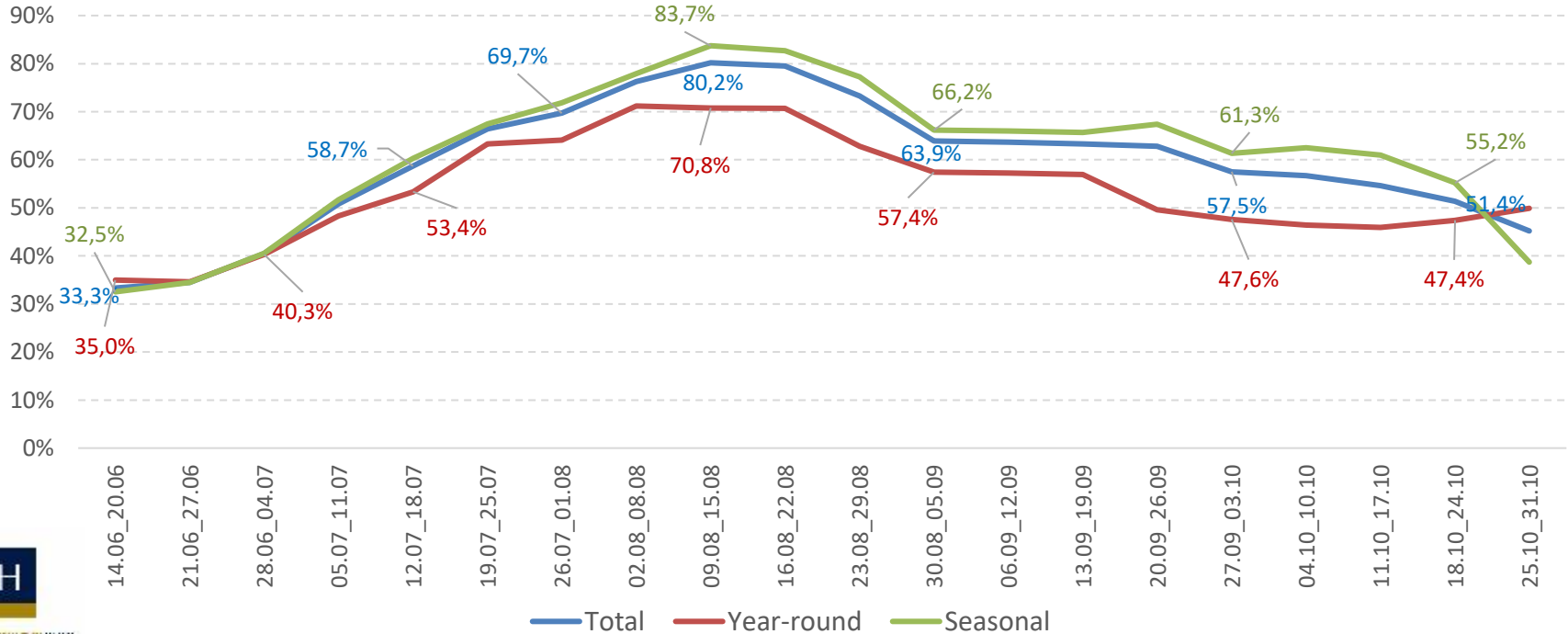
Ratio of Open Hotels During the Survey in Selected Regions, 2021



Average Occupancy Rate of Open Hotels 2021

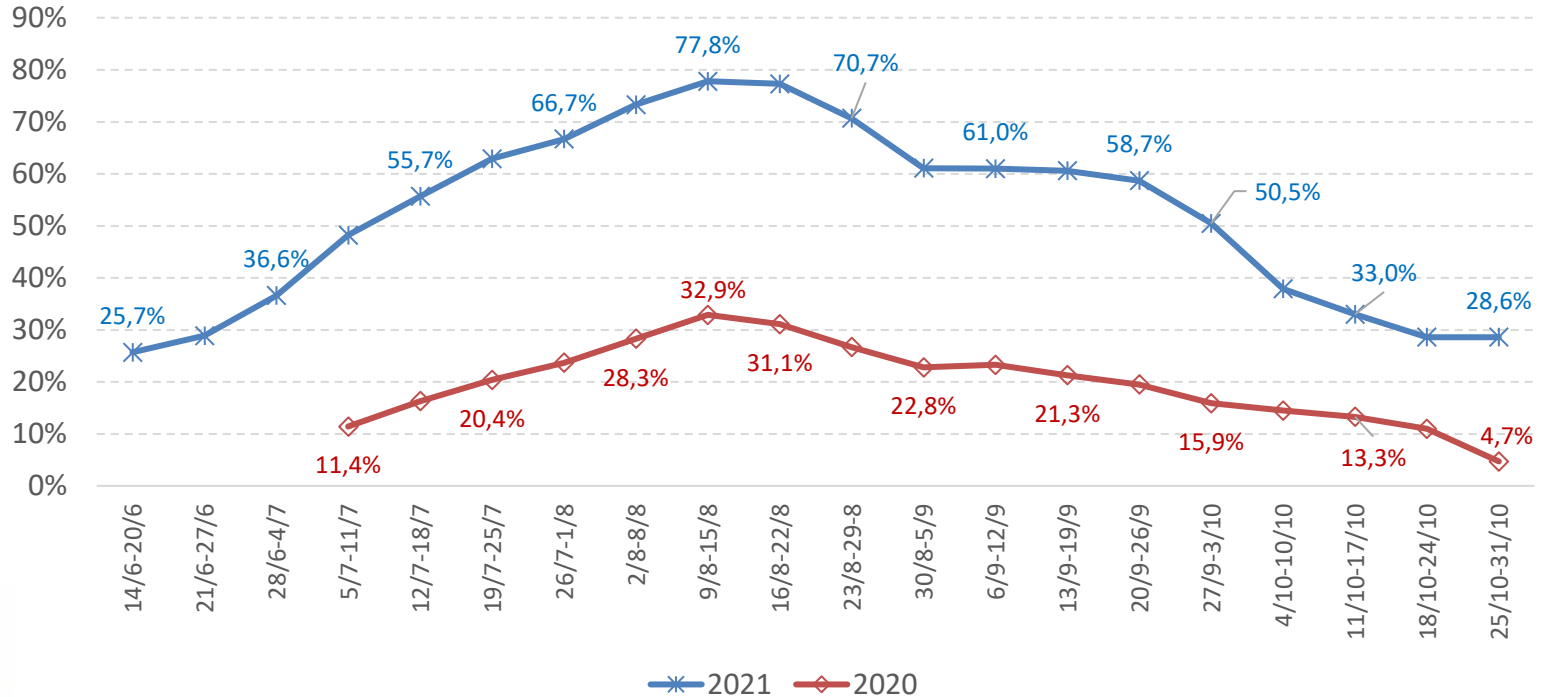
Total, Year-round and seasonally operating hotels

Hotels that operated during 2021 (open).



Average Occupancy Rate^(*) : Weekly Evolution Comparison 2020 - 2021

(*) Projection to total hotel capacity



Average Occupancy Rate^(*) : selected months 2019-2021

(*) *total hotel capacity.*

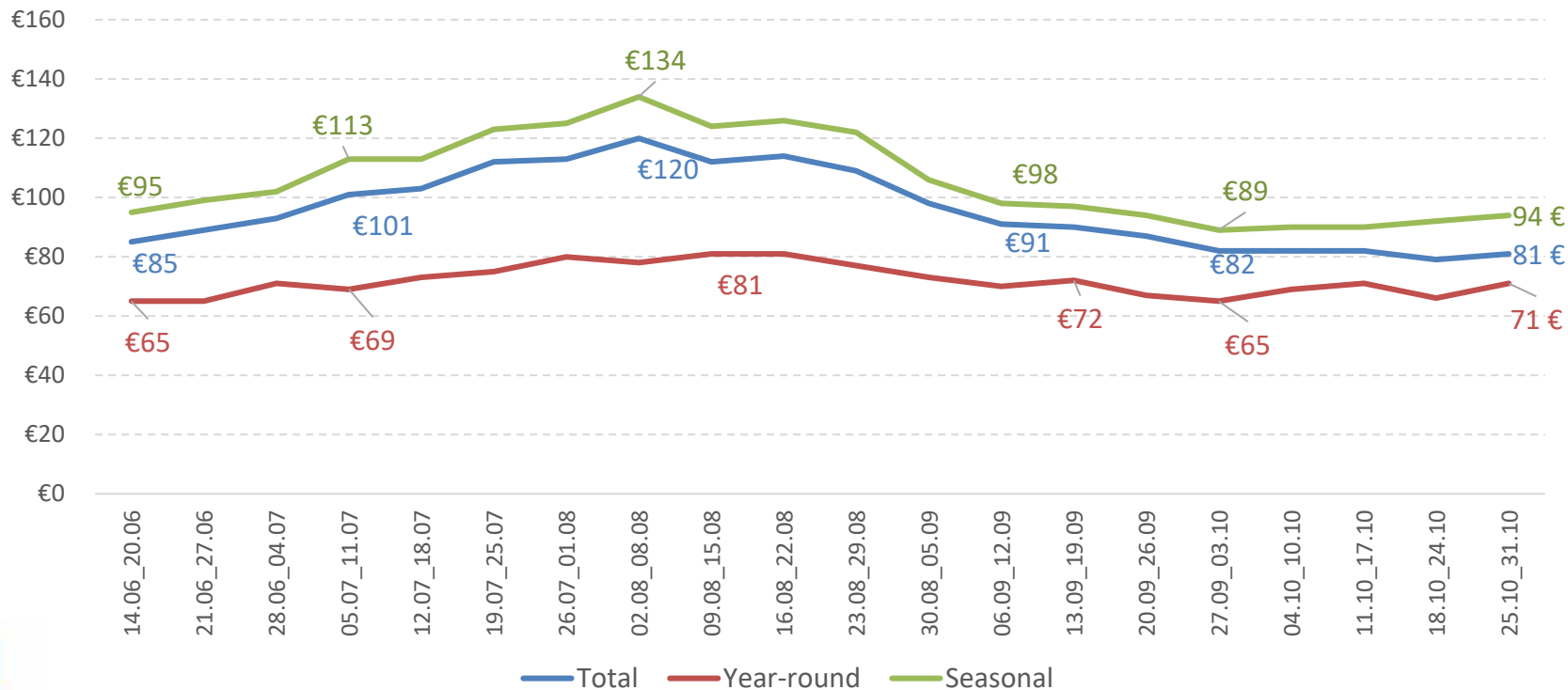
| Month | 2021 | 2020 | Month | 2019 |
|-----------|-------|-------|-----------|-------|
| July | 54,0% | 17,9% | May | 57,3% |
| August | 74,8% | 29,8% | August | 86,8% |
| September | 58,4% | 21,7% | September | 79,2% |

July of 2020 and 2021 is compared to May 2019, as they were the launching months of each tourism season

The occupancy rate of September started from relatively high levels, to finally reach 58%, due to hotel closure, but also due to low occupancy rate of Attica hotels.

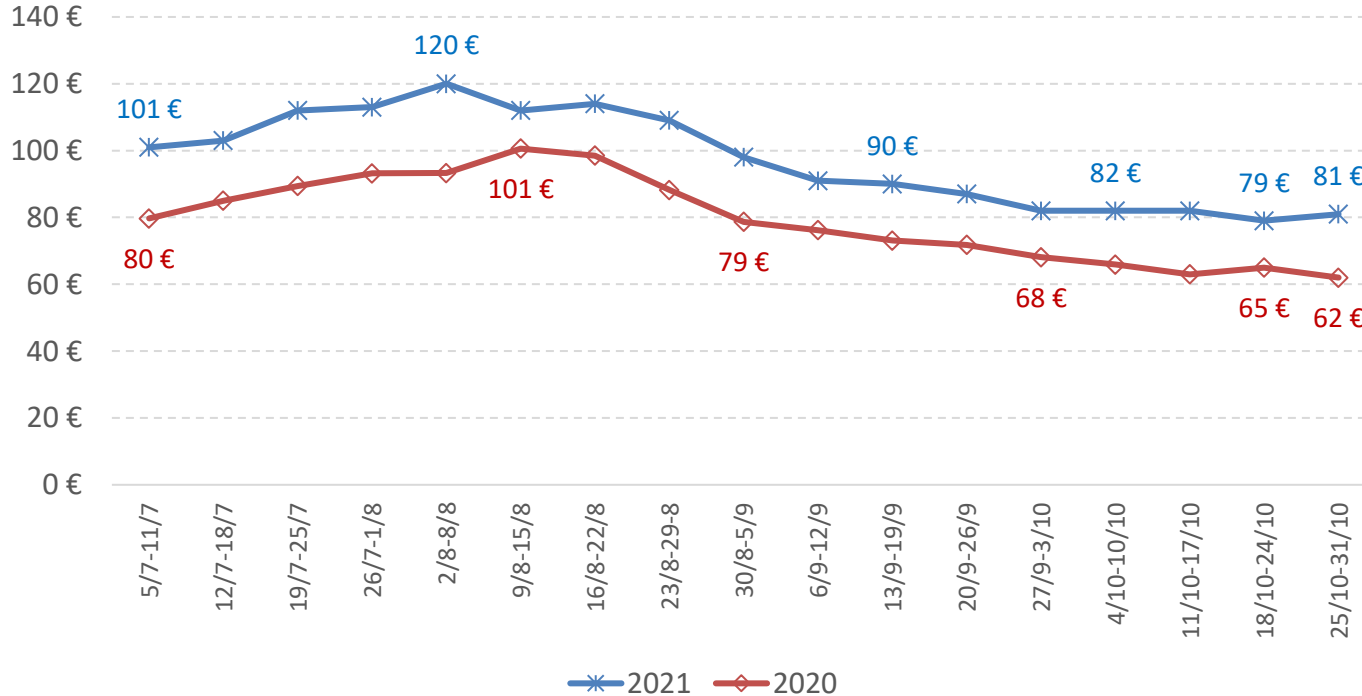
Average Room Rate of Open Hotels 2021

Total, Year-round and seasonally operating hotels



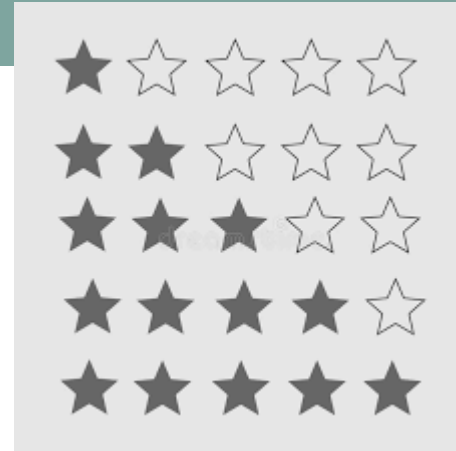
Average Room Rate: Weekly Evolution

Comparison 2020 - 2021



Analysis based on hotel category

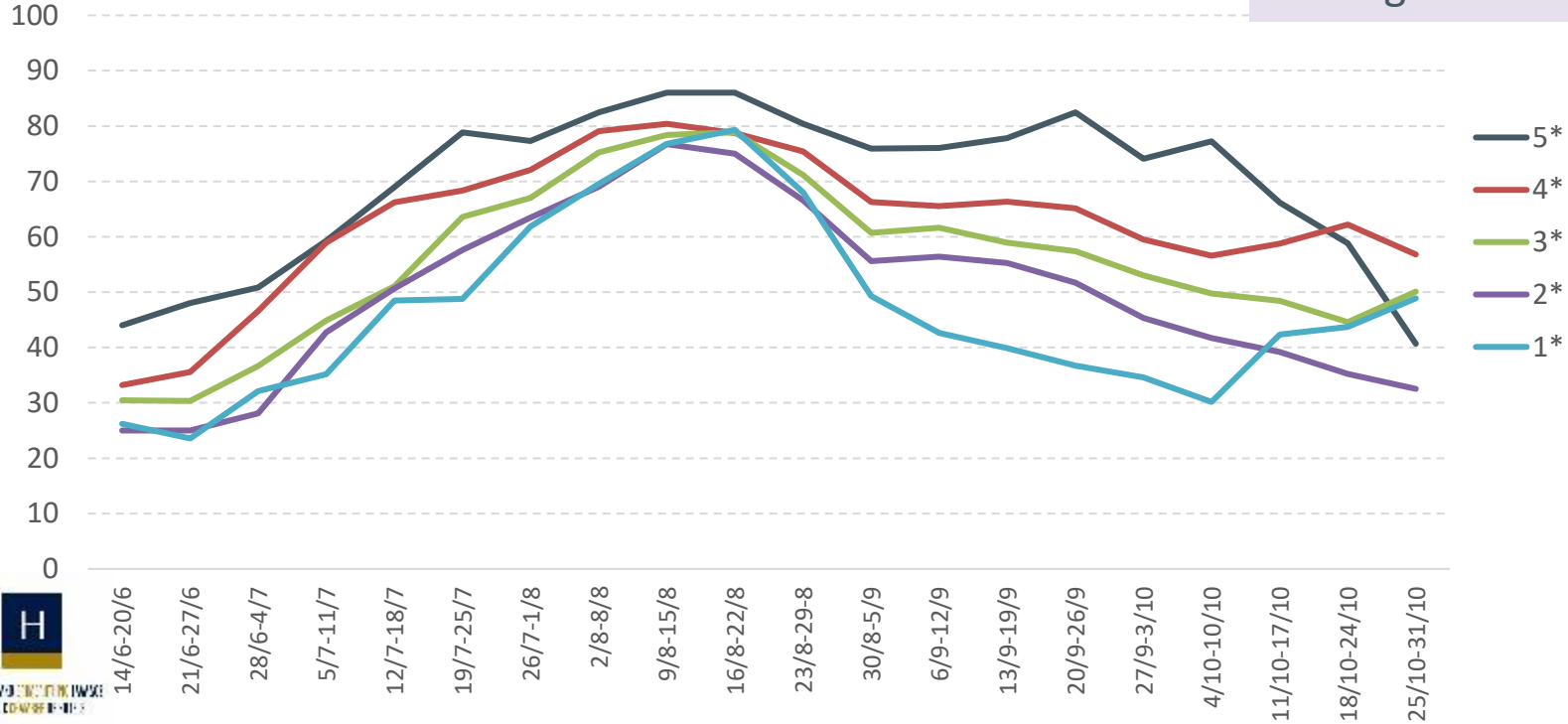
- 5*****
- 4*****
- 3***
- 2**
- 1*

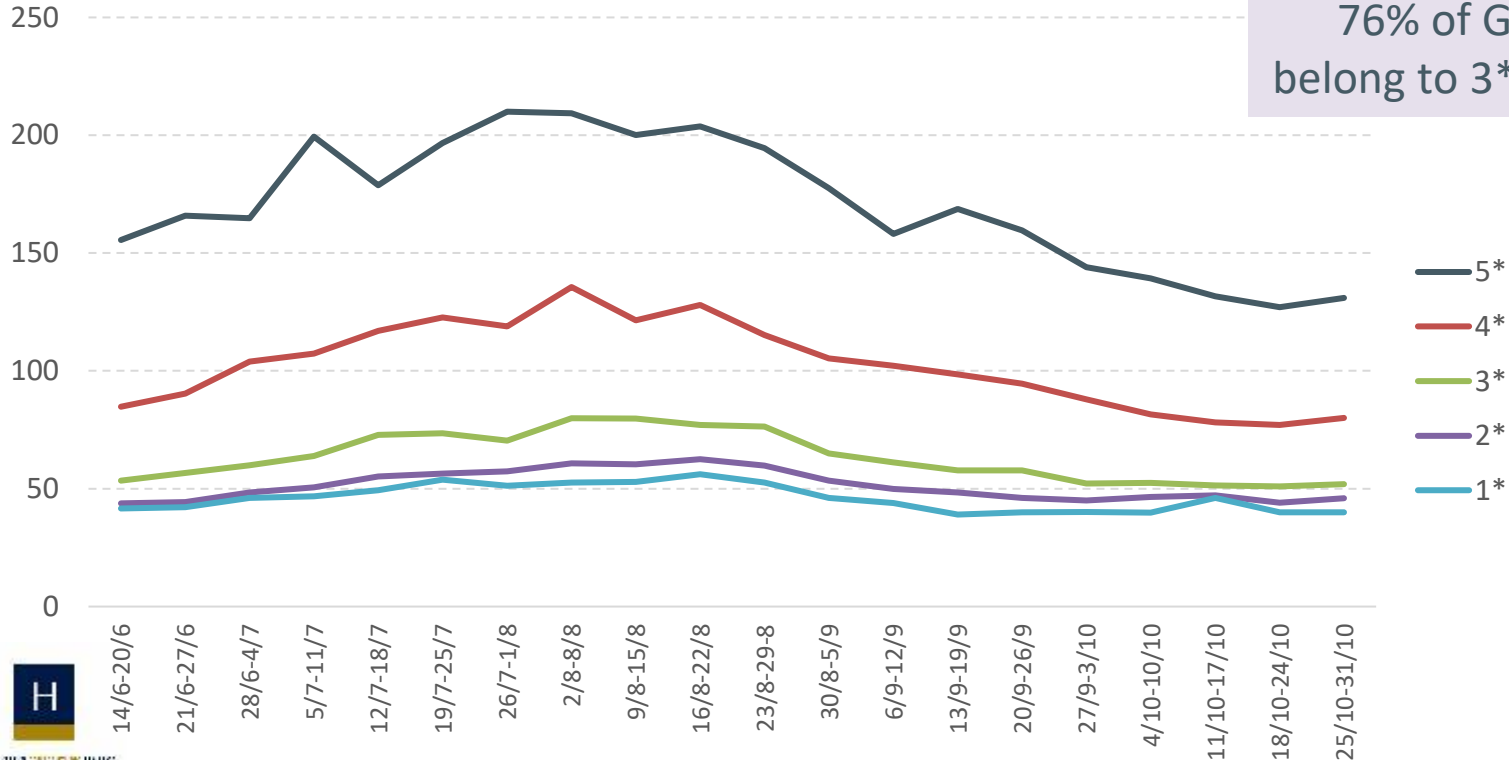


Hotel performance by category

OCCUPANCY RATE OF OPEN HOTELS(%)

76% of Greek hotels belong to 3*-1* categories.





76% of Greek hotels belong to 3*-1* categories.

Regional Analysis

Selected Regions

- Attica
- Macedonia-Thrace
- Crete
- South Aegean Islands
- Ionian Islands



Average Monthly Occupancy Rate^(*) and Room Rate Selected Regions - 2021

() refers to open hotels.*

| Region | July | | August | | September | | October | |
|-----------------------------|----------------|--------------|----------------|--------------|----------------|-------------|----------------|-------------|
| | Occupancy Rate | Room Rate | Occupancy Rate | Room Rate | Occupancy Rate | Room Rate | Occupancy Rate | Room Rate |
| Attica | 57,9% | 96 € | 59,3% | 91 € | 63,2% | 88 € | 52,0% | 91 € |
| Macedonia - Thrace | 52,1% | 77 € | 69,4% | 81 € | 45,5% | 63 € | 42,2% | 54 € |
| Crete | 63,3% | 63 € | 82,2% | 82 € | 73,1% | 73 € | 58,9% | 59 € |
| South Aegean Islands | 60,9% | 61 € | 80,7% | 81 € | 67,4% | 67 € | 55,7% | 56 € |
| Ionian Islands | 48,3% | 48 € | 78,3% | 78 € | 61,9% | 62 € | 40,7% | 41 € |
| Country Total | 57,2% | 104 € | 77,3% | 114 € | 62,2% | 90 € | 52,0% | 81 € |