

Athens International Airport
Eleftherios Venizelos

Aerostat Handbook

2020



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2020 Words, Numbers & Thoughts...

2020 was a year severely hit by the Covid-19 pandemic with structural repercussions of unprecedented magnitude upon business and society and undoubtedly, the most challenging year for the global aviation and tourism industries in their entire history. Non-coordinated travel bans, a wide range of measures, initially implemented within national boundaries, airlines limiting or ceasing operations, airports experiencing a near-halt of their entire business, state-imposed restrictions on numerous business activities, non-existent or severely suppressed travel confidence, are only some of the pandemic's dire consequences.

For an industry which has been exemplary for its level and extent of global and uniform standardization in all aspects of its business, non-coordinated, national-scale & erratic actions, bans and measures, have resulted to a tremendous shock with abrupt and long-lasting repercussions.

Within this framework, this 19th edition of AEROSTAT aims at analyzing the impact of Covid-19 on Athens International Airport's (AIA) traffic. It also includes a wide range of important data and statistics relating to the Athens travel market for 2020, with special focus on issues such as passengers' propensity to travel and their perception on the additional protective measures implemented during air travel - issues of high importance not only during 2020, but also during the running 2021.

In 2020, passenger traffic at AIA amounted to 8.08 million passengers, the lowest traffic level ever experienced, presenting a decline of 68.4% vs the corresponding levels of 2019. The spread of the pandemic effects across the airport operations has also heavily impacted strategic marketing actions and activities. As airlines' decisions on future route planning and development were severely disrupted and air connectivity was shuttered and became subject to governmental restrictions and approvals, there was initially room only for tactical and short-term, marginal remedial steps. To this effect, temporary measures were implemented to offer cost mitigation to operating airlines

during the lockdown periods, while the Airport Company adjusted its existing incentives' policy by waiving part of the conditionalities for discounts' eligibility to immediately respond to the prevailing market conditions.

Thus, this Handbook includes all 2020 information regarding typical traffic segments, main operational processes, passengers' profile, incoming and outgoing tourism traffic passing through the Airport and emerging market trends in Greece and worldwide.

2021 remains a challenging year for the aviation industry, with the Covid-19 pandemic still unfolding through an ongoing series of pandemic waves and mutations, resulting in an uncertain traffic outlook, with the forecasts for passenger traffic still remaining lower than the pre-pandemic levels. In this volatile situation, airlines and, of course, passengers are our prime focus with the airport striving to create the optimum environment in order to appease their uncertainty, restore their trust in air travel and facilitate their travel decisions and plans. With the concept of hospitality ("philoxenia" in Greek) deeply rooted in our DNA and the role of the human factor being the centerpiece of all our concerted actions, we aim for the continuous enhancement of the services offered, under the principles of sustainability, maintaining, at the same time, a resilient business model.

A last point.

During this – still ongoing – crisis of unprecedented magnitude, the very well-known quote of one of the most important personalities of the 20th century stands out:

"Never let a good crisis go to waste", Sir Winston Churchill is credited with saying in the mid-1940s as the world approached the end of WWII. It causes all of us to look for a silver lining during the crisis and seek opportunities where they might not have been before.

But it also raises the question: "Have we – in aviation – let this good crisis go the waste?"

If the answer is NO, then, we are ready for recovery and duly equipped for the challenges ahead.

Ioanna Papadopoulou
Director, Communications & Marketing

0 Chapter Zero

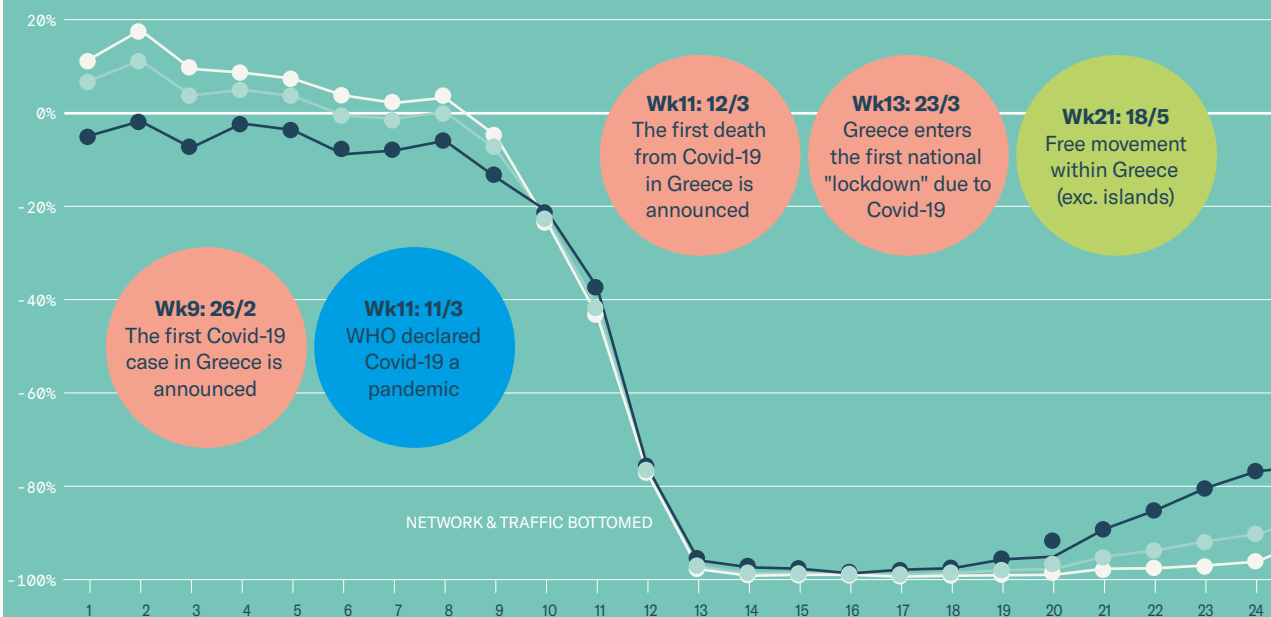
Covid-19, being the absolute disruptor in the global aviation and tourism industries, has decimated over a decade of gains in air connectivity globally, with severe and lasting effects in air travel; Athens International Airport was greatly impacted in most of its business aspects

The Covid-19 pandemic being a crisis of unprecedented magnitude, marked a new era in the global aviation industry, with passenger traffic worldwide declining by more than 60%, while billions of dollars have already been lost in airport, airline and international tourism revenues. Major impact on Athens International Airport's traffic

commenced in March 2020 and rapidly deteriorated, leading to practically zero passenger traffic by the end of the month. Impact on air travel peaked in the second quarter, with April and May featuring only minimal airline operations. A gradual but slow improvement was witnessed as of the end of May, initially for the domestic

Covid-19 Timeline & Weekly Passenger Traffic Evolution 2020

Global ●
Greece ●
Greek air Travel ●



travel and mid-June onwards for the international traffic, in line with a gradual easing of travel bans and restrictions. During the third quarter of the year, efforts towards a gradual lifting of international travel restrictions continued, indicating towards a recovery period; this, however, proved to be short-lived, since the second pandemic wave emerged in October and severely affected traffic during the fourth quarter.

The pandemic had also a great impact on airport operations, with special processes having to be designed and new measures to be applied. To this effect, handling Covid-19 through a specifically – designed response mechanism was immediate from Day 1 of the pandemic’s breakout. A new organizational structure was established, ie. the Emergency Response Team for Covid-19, or EReTeCo. More specifically, EReTeCo has been established as a comprehensive preparedness & emergency Working Team focused on the following key areas of company’s activities and critical areas: Employees, Airport, Aviation, Supply Chain, Regulatory and Industry affairs, Financial Risk, Communications and Company’s Social Responsibility issues.

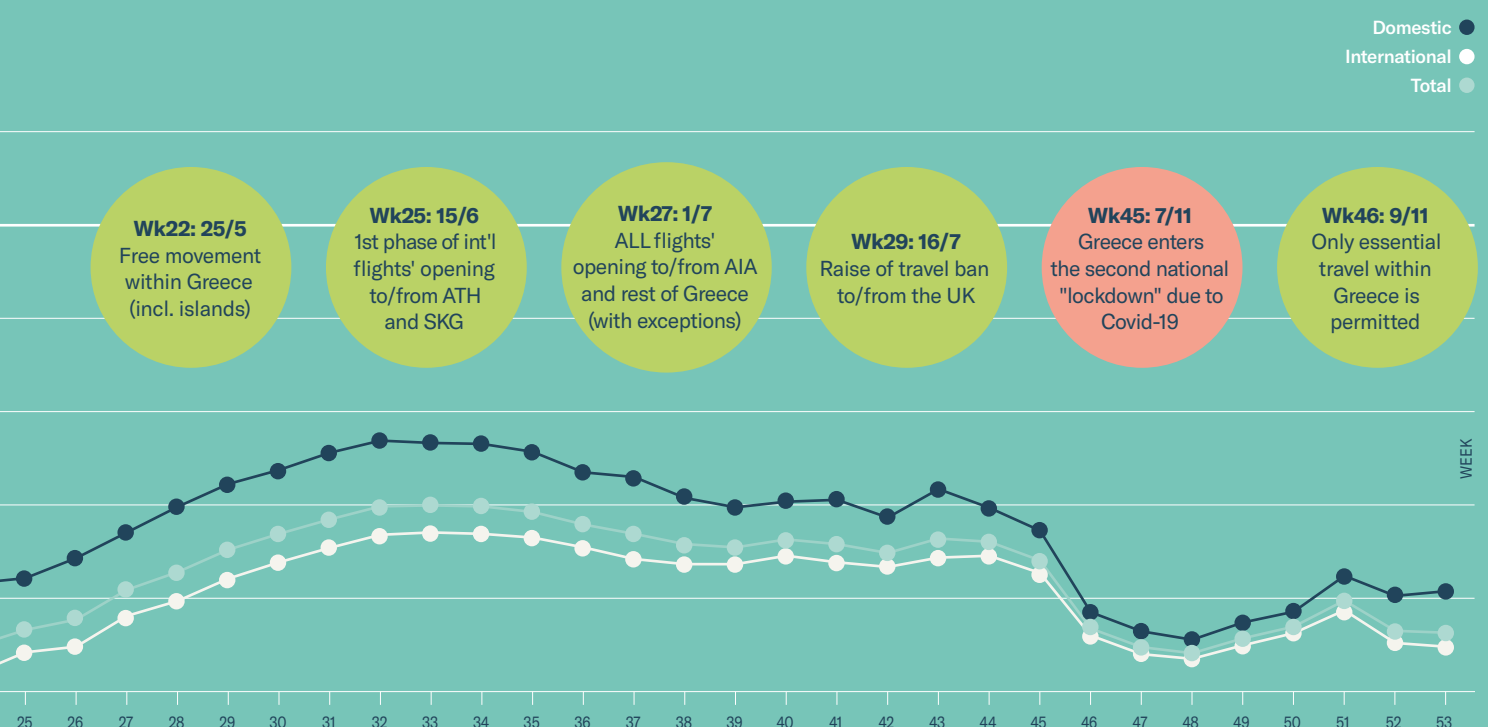
Additionally, AIA was one of the first aviation companies that, in June 2020, signed up to the European Union Aviation Safety Agency’s (EASA) charter for the return to normal operations under Covid-19, pledging to work with their national authorities to put measures in place to support health and safety – and to report back on their experiences. Concerning the travelling public, AIA immediately proceeded with an awareness campaign including a Frequently Asked Questions section that was developed on the corporate website for

the Covid-19 travel procedures and all health and safety measures implemented.

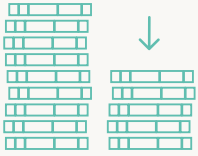
Finally, one of the major and lasting repercussions of the pandemic on air travel demand was the public’s lack of trust for air travel. In June 2020, the time of the first national lockdown in Greece, only 36% of the public was willing to travel by air immediately, while it only grew to 46% until the Christmas period 2020. Higher levels of trust were apparent for domestic travel, and among foreigners, compared to Greek residents. People travelling for business or to visit friends and relatives (VFR), showed increased levels of confidence compared to leisure travelers, especially towards the end of the year with the percentages of people willing to travel immediately by air reaching by the end of the year the 55% and 52% respectively. It was evident however from the beginning of this crisis, that people had not lost their desire to travel, but they were held back from international travel by restrictions, uncertainty, erratic and non-coordinated measures and complexity.

Being now well within 2021, the Covid-19 pandemic and its repercussions still linger on; there is much talk about the end of the pandemic and high expectations for 2022, while everyone seems to be willing to leave behind 2020- the Year Zero for Aviation, being also the Year when “Building Back Better” formed the solid basis of our medium- and long-term strategies ahead.

And Antifragility. As Nassim Nicholas Taleb has so eloquently put it, “Antifragility is beyond resilience & robustness. The resilient resists shocks and stays the same; the antifragile gets better”.



2020 Key "Covid-19" Global Aviation figures



\$418bn

Airline passenger revenues loss

SOURCE: IATA



\$1.3tn

International Tourism Receipts' decline

SOURCE: UNWTO



-60%

World Passenger Traffic decline

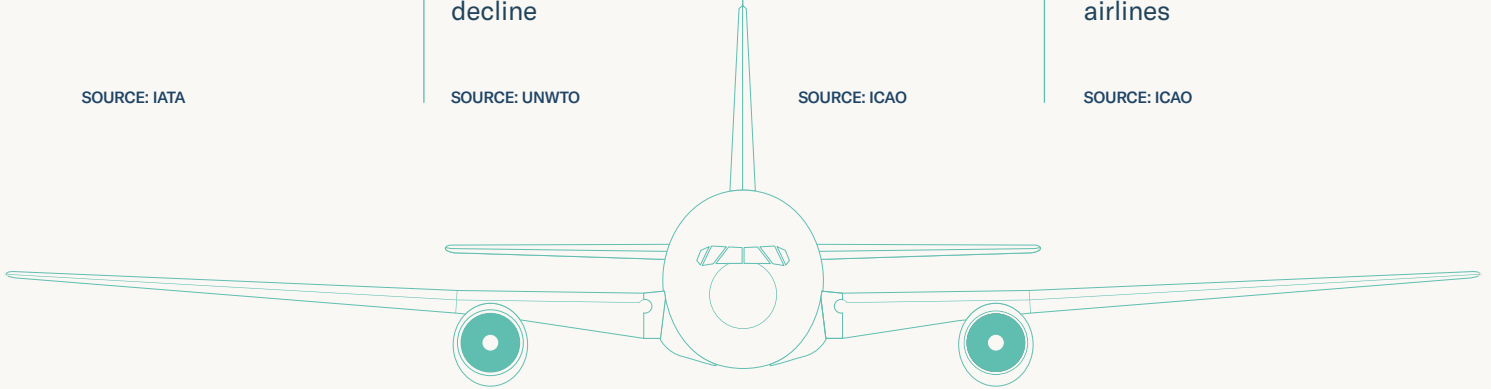
SOURCE: ICAO



-40%

Overall Reduction of seats offered by airlines

SOURCE: ICAO

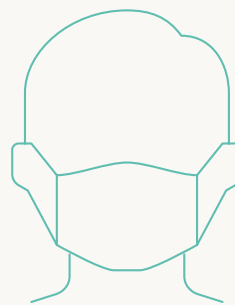


Covid-19 measures Informative Campaign

Your health is our priority



Keep distances



Wear face mask

595

informative signs placed in-Terminal

5

vending machines with masks and sanitizers, in-Terminal located



Cough or sneeze on a tissue or on the inside of the elbow



Wash hands - Use hand sanitizer

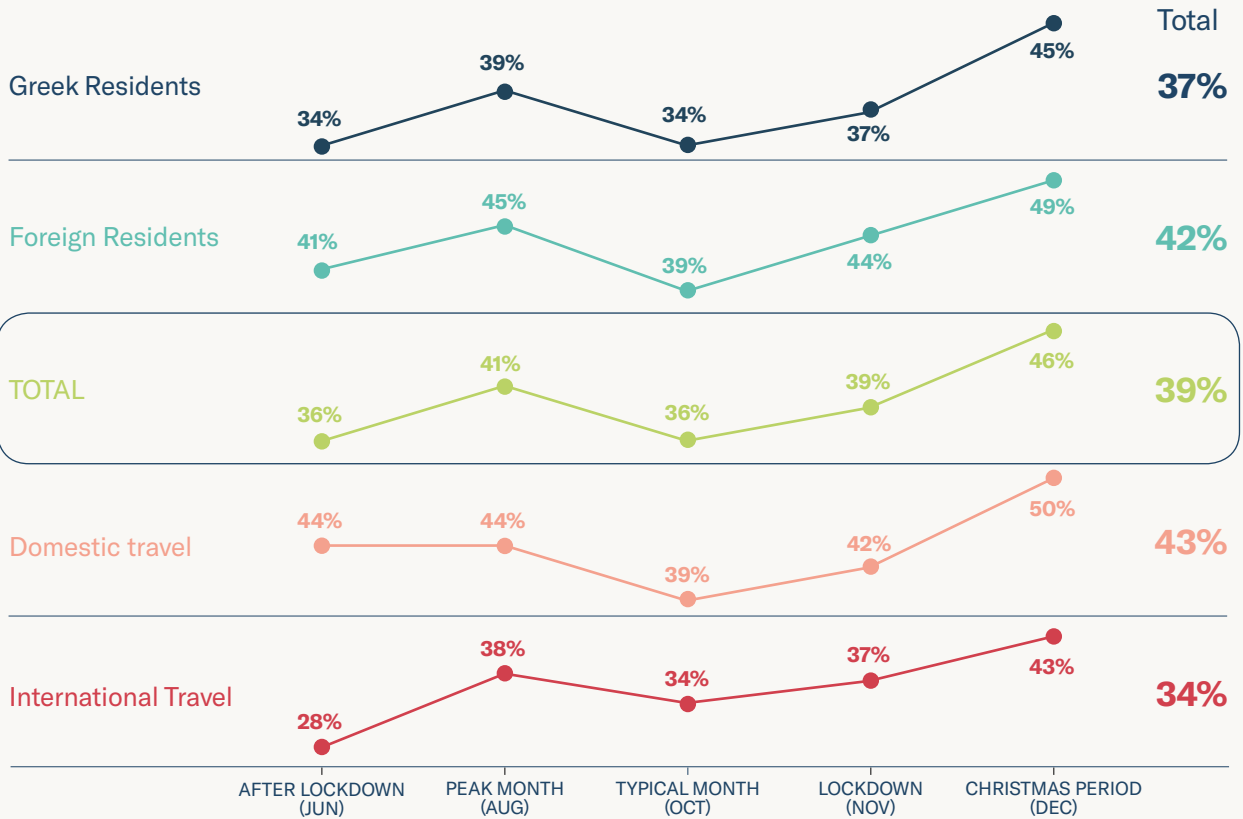
381

sanitizers placed in in-Terminal and airport premises

Intention to travel "Immediately" by segment of traffic

Based on the current situation regarding Covid-19 and following the air travel restart, when are you likely to travel by air?

% those likely to travel immediately

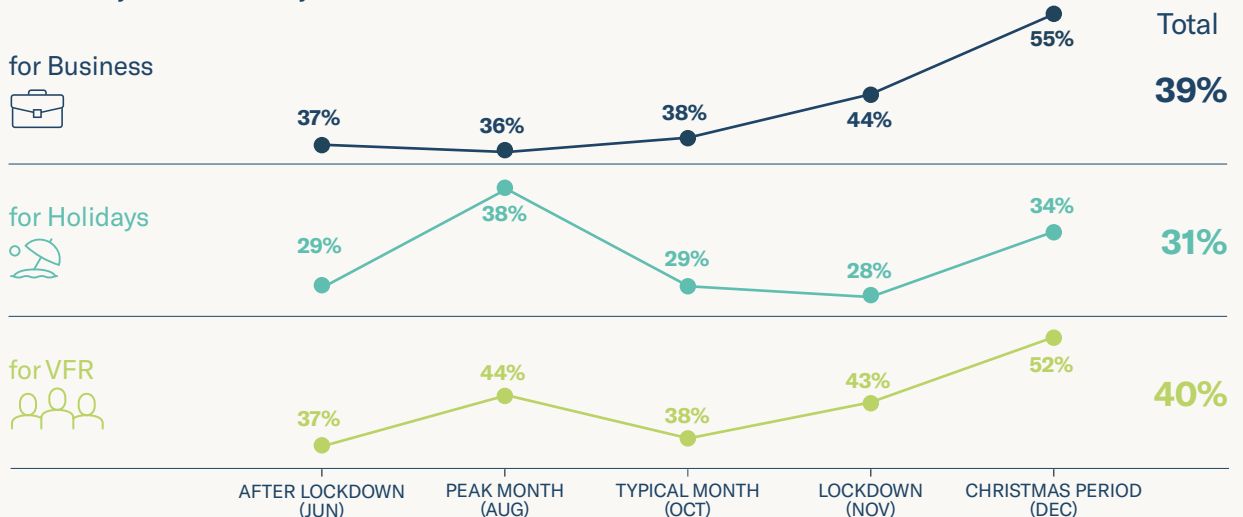


SOURCE: ONLINE SURVEY JUN-DEC 2020

Intention to travel "Immediately" by purpose of trip

Based on the current situation regarding Covid-19 and following the air travel restart, when are you likely to travel by air?

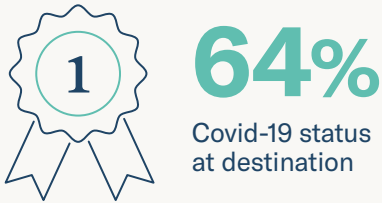
% those likely to travel immediately



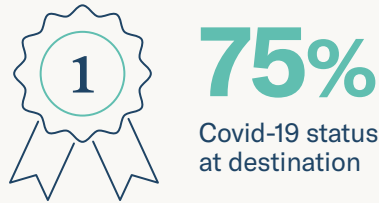
SOURCE: ONLINE SURVEY JUN-DEC 2020

Key criteria for selecting next leisure destination

Greek residents

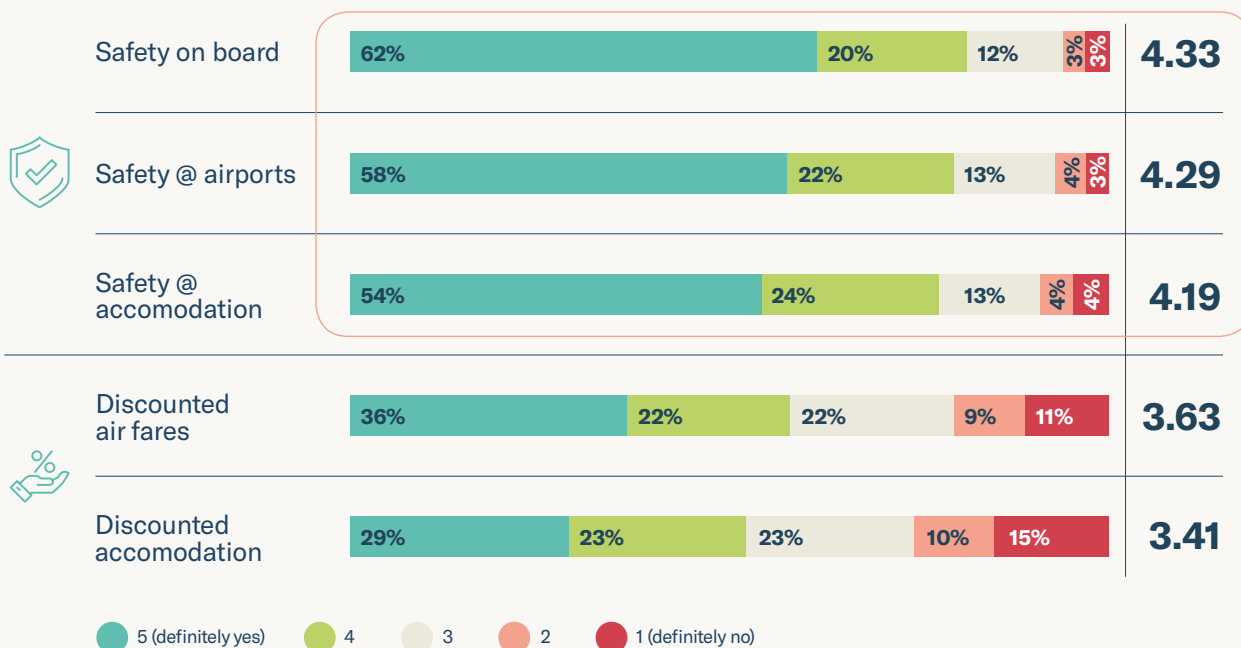


Foreign residents



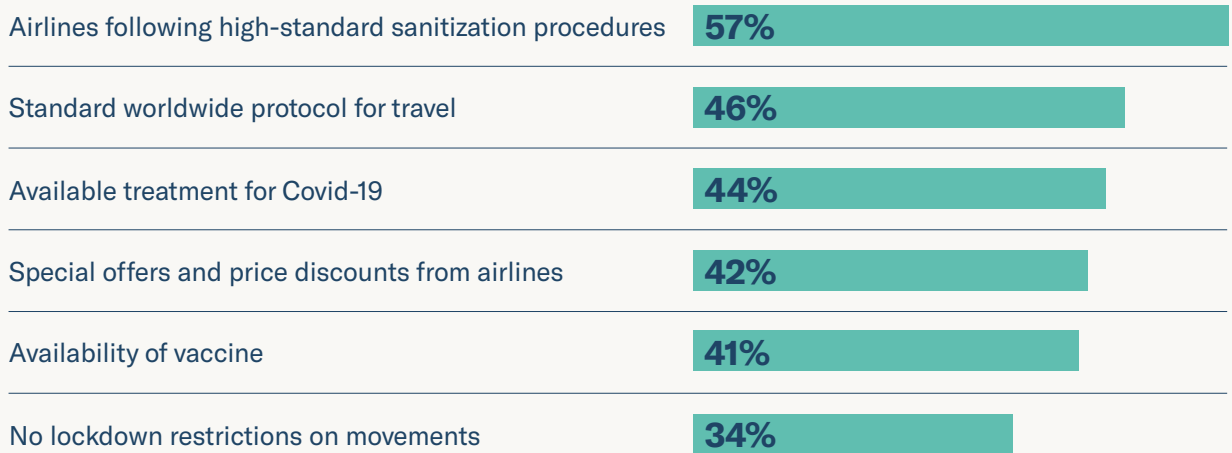
SOURCE: InfluencaAIRs

Elements encouraging passengers to travel



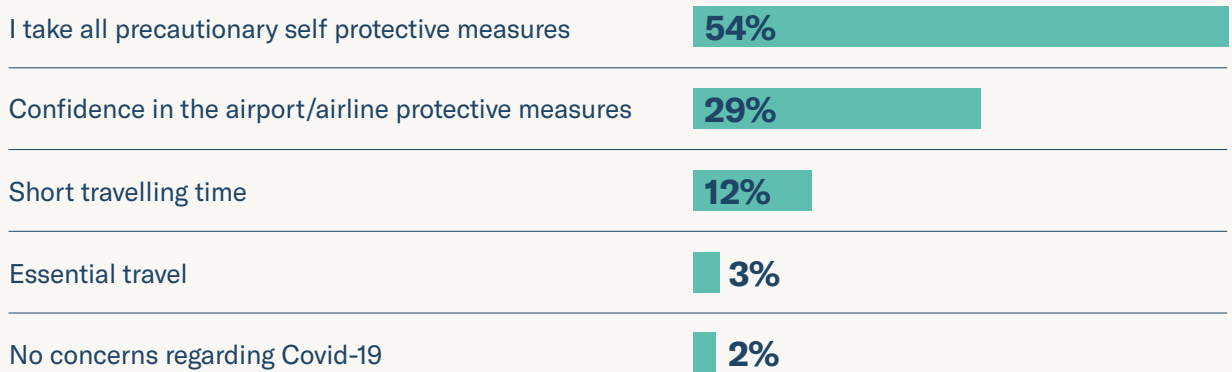
SOURCE: InfluencaAIRs

Actions/developments that would persuade passengers to travel by air in the next months



SOURCE: InfluenAIRs

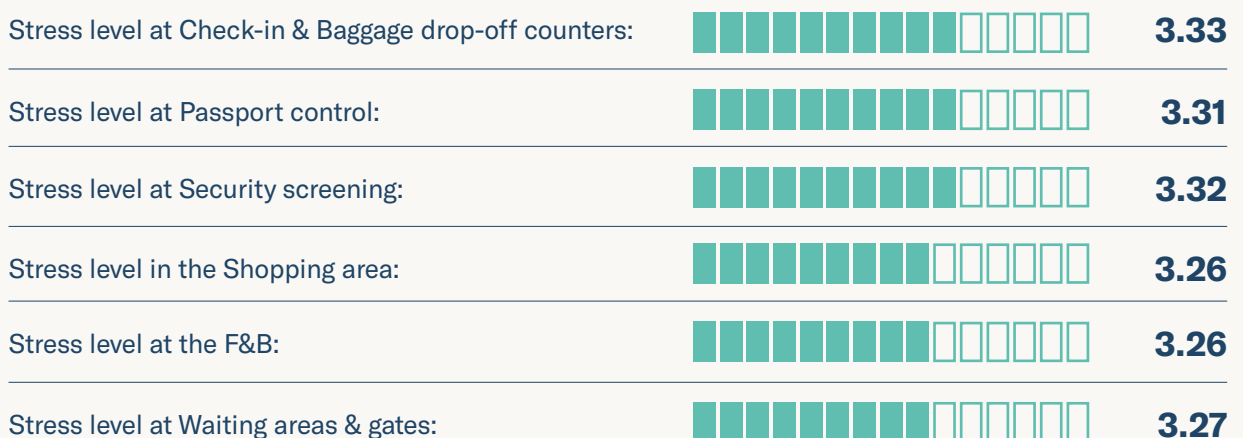
Main factors contributing towards passengers' decision to travel by air



Level of **confidence** in travelling: **4.01**
 On a five-point scale, where 5 stands for "very high confidence" and 1 "very low confidence"

SOURCE: PASSENGER SURVEY

Passenger journey during Covid-19 era. Stress level at AIA's touchpoints



On a five-point scale, where 5 stands for "very high stress" and 1 "very low stress"

SOURCE: PASSENGER SURVEY

1 Catching Up with 2020

2020 ended with passenger traffic amounting to 8.1 million, the lowest traffic ever experienced, reduced by 68.4% vs 2019

In 2020, the global aviation industry was severely hit by the Covid-19 pandemic, which included a combination of national and international travelling bans, airlines limiting or ceasing operations, state-imposed restrictions on numerous business activities, suppressed travel confidence and more.

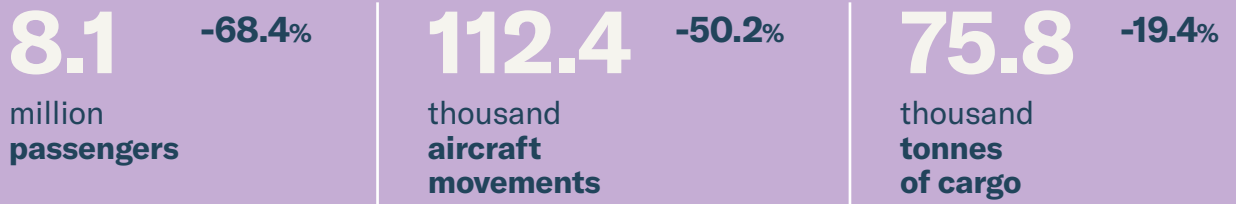
2020 ended with traffic at Athens International Airport amounting to 8.08 million passengers, the lowest ever witnessed, reduced by 17.5 million passengers vs 2019, ie. demonstrating a decline of 68.4%. This was the outcome of the sharp traffic drop due to the Covid-19 pandemic from March to December 2020. In line with the industry-wide observations, domestic passengers were slightly less affected than the international ones, presenting a 61.1% decrease compared to 2019, vis-a-vis the 71.6% drop in international traffic.

In 2020 (also taking into account the period before the pandemic), Athens was directly connected with scheduled services with 126 destinations-cities (157 in 2019), in 51 countries (55 in 2019), operated by a total of 59 carriers (66 in 2019).

Aircraft movements amounted to 112.4 thousand in 2020, 50.2% below the respective 2019 levels, witnessing a relatively milder decline than passenger demand, with domestic operations being reduced by 44.8% and international services by 54.0% compared to the respective 2019 figures.

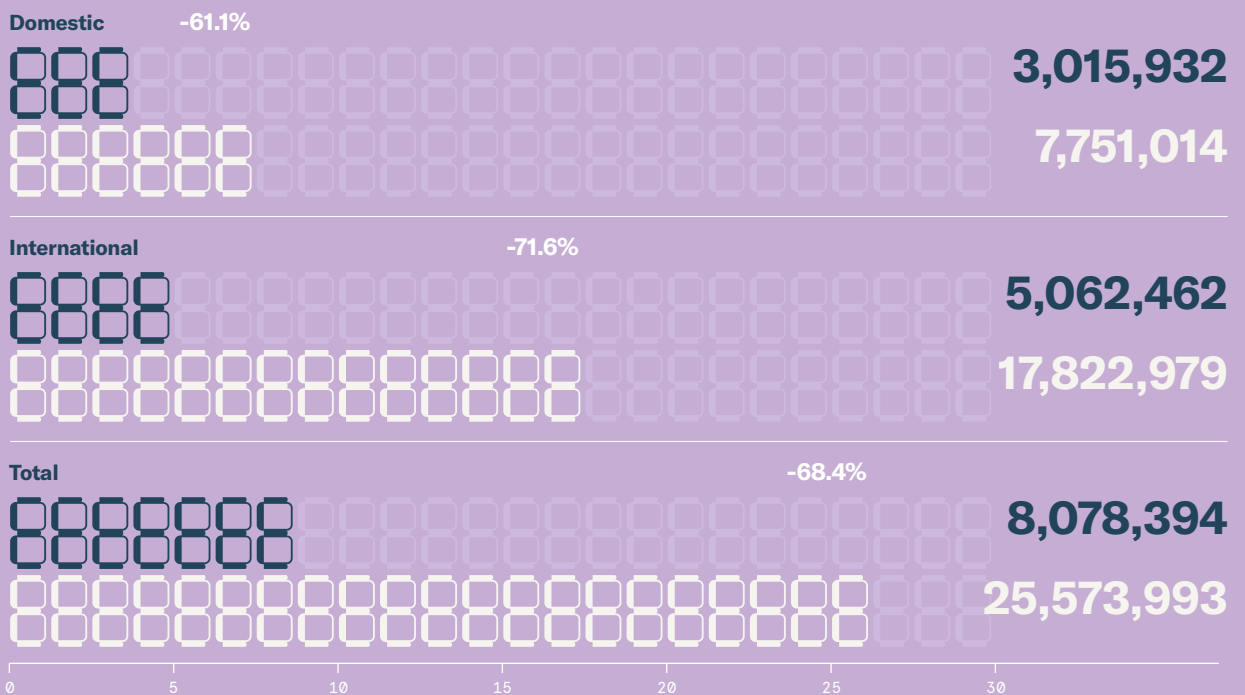
Despite the pandemic's severe impact leading to a reduced cargo capacity, total cargo traffic was less affected in 2020 and amounted to 75.583 tonnes, thus restraining the overall decrease at a mere 19.4% compared to 2019.

2020 Traffic Highlights



Passenger Traffic Development 2019 - 2020

2020 ●
2019 ●



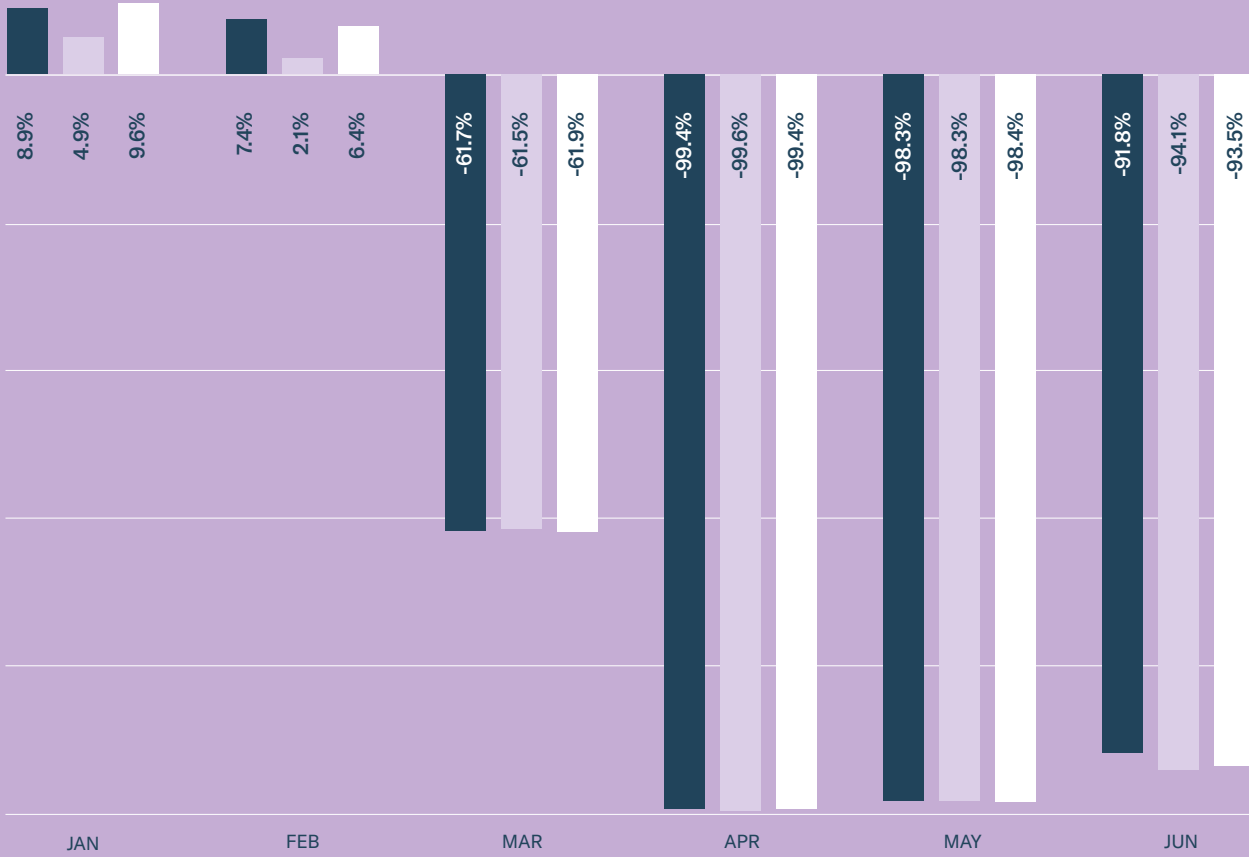
Quarterly Passenger Traffic Development 2020

Domestic ●
International ●
Total ●

% Growth 2020/2019

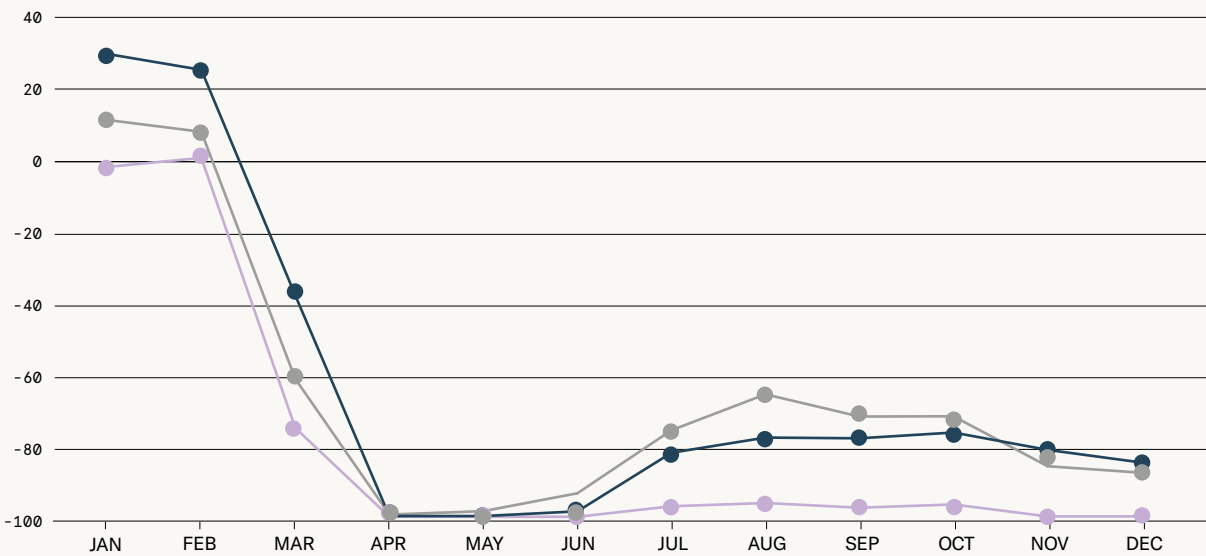


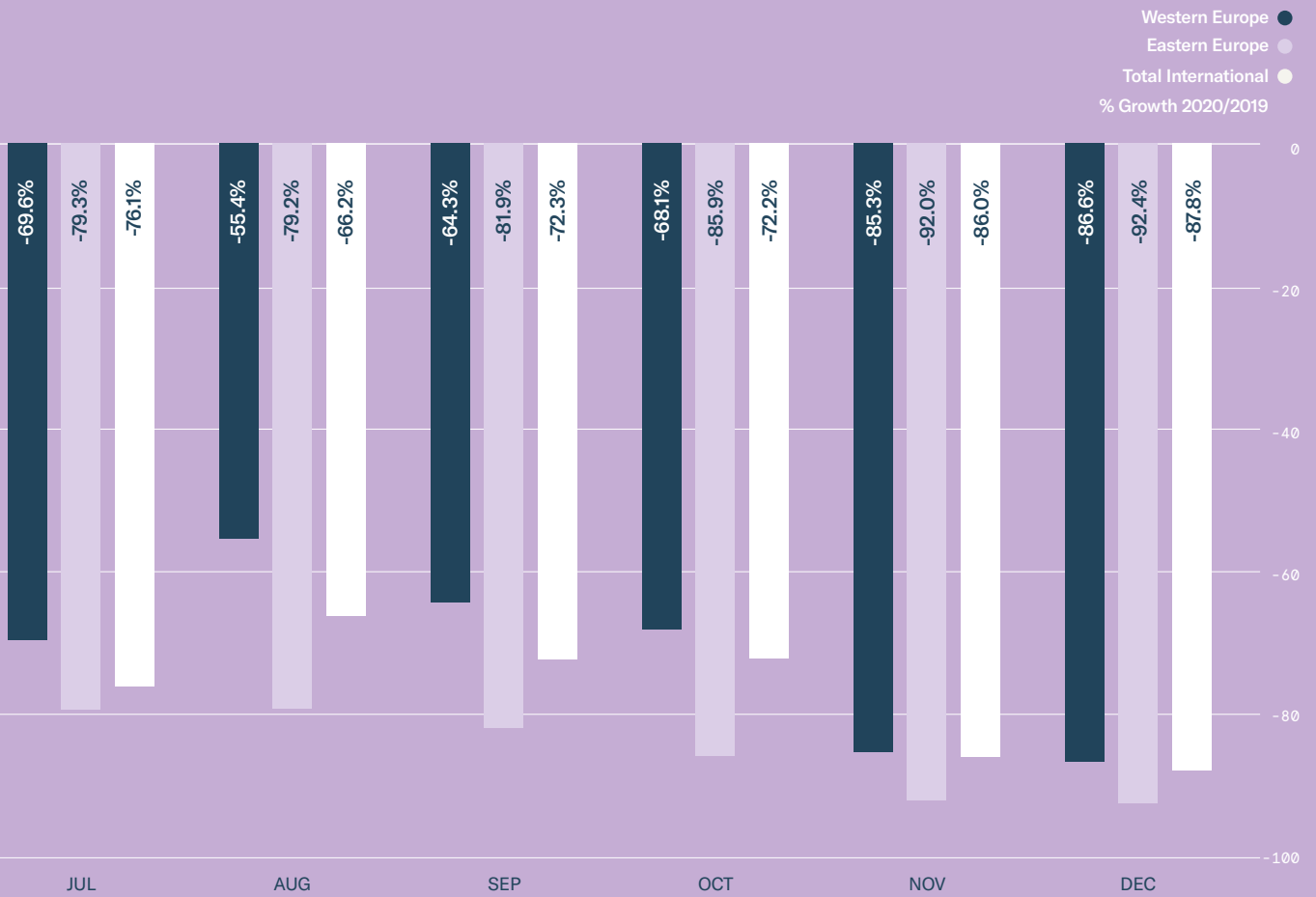
International Passenger Traffic Development 2020 / Europe



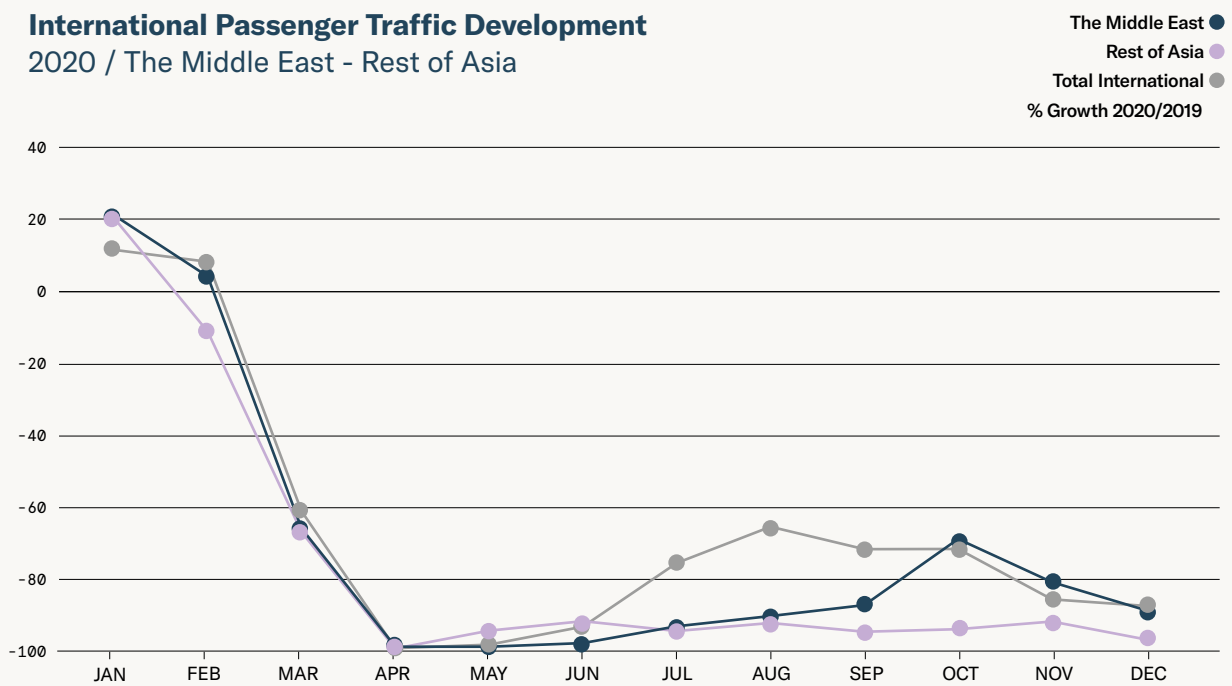
International Passenger Traffic Development 2020 / Africa-America

Africa ●
 America ●
 Total International ●
 % Growth 2020/2019



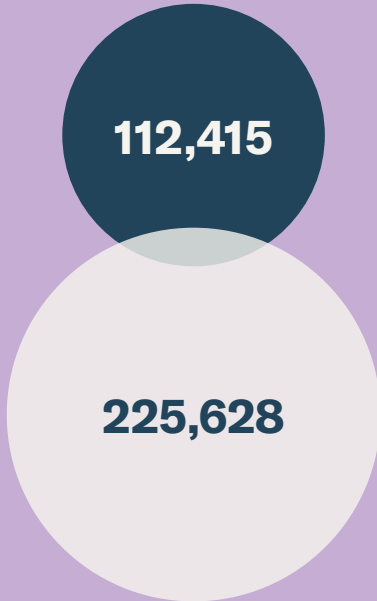


International Passenger Traffic Development 2020 / The Middle East - Rest of Asia



Traffic Development of A/C Movements 2019-2020

Total
-50.2%



Domestic
-44.8%



International
-54.0%

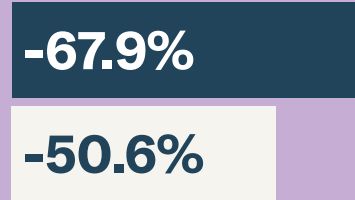


2020 ●
2019 ●

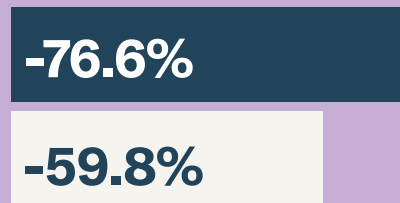
International Traffic Development per Region 2020

Passengers ●
Flights ●
% Growth 2020/2019

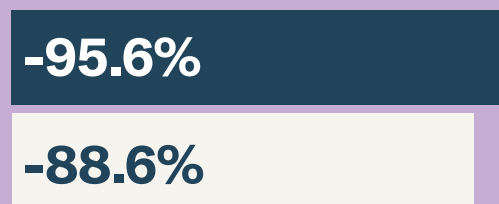
Western Europe



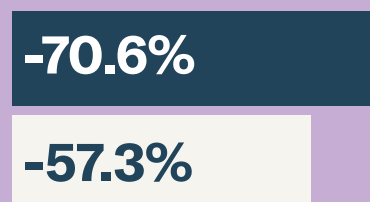
Eastern Europe



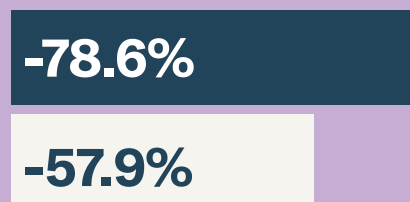
America



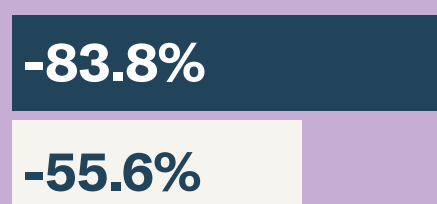
Africa



Middle East

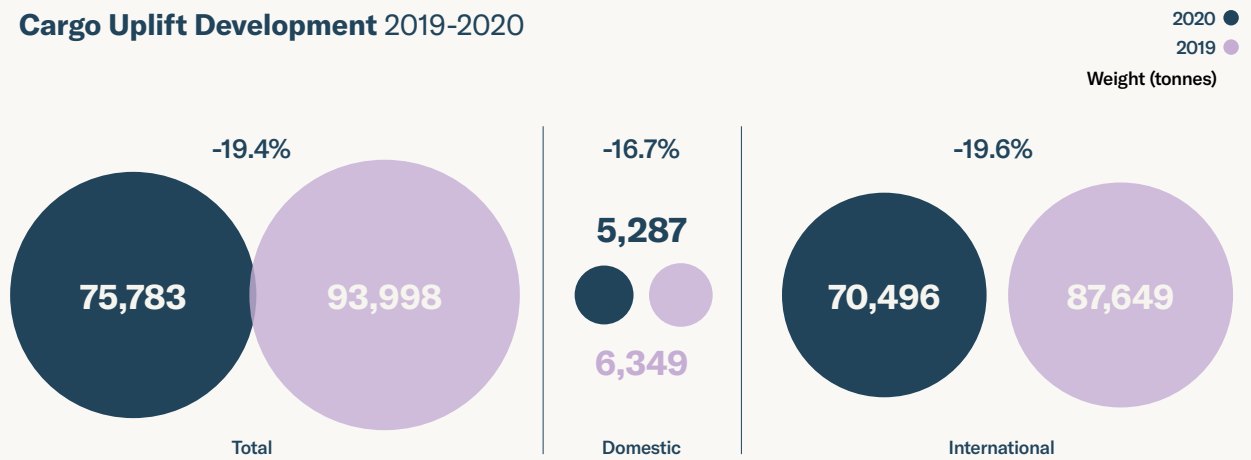


Rest of Asia

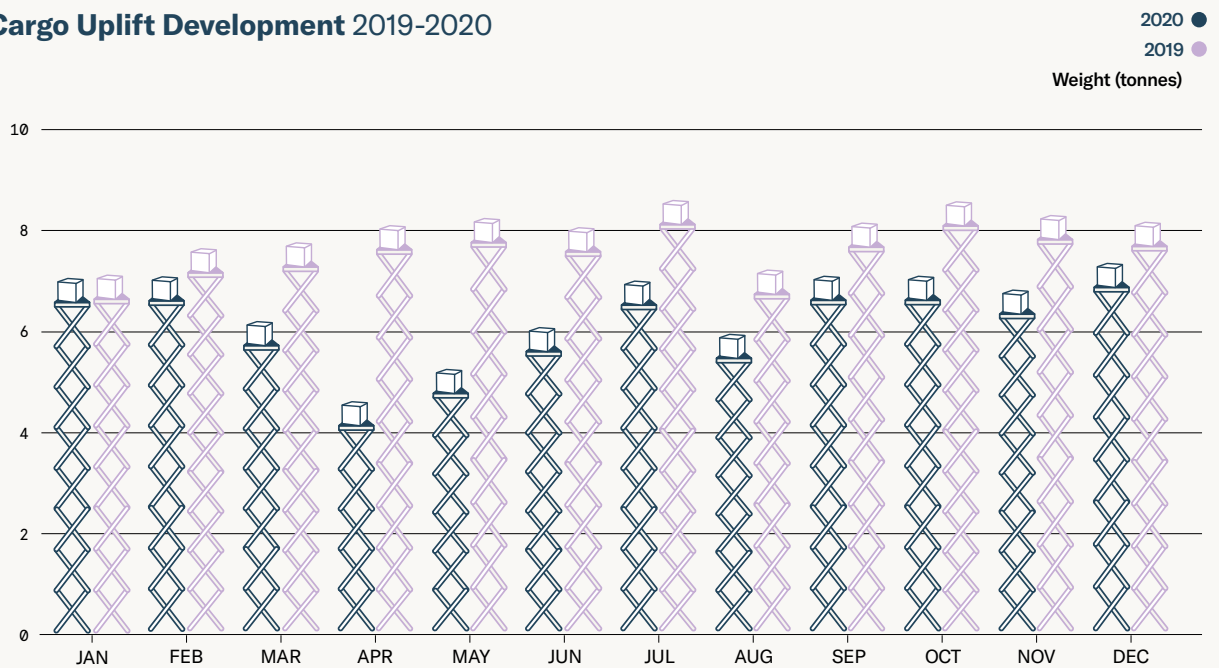


0 -20 -40 -60 -80 -100

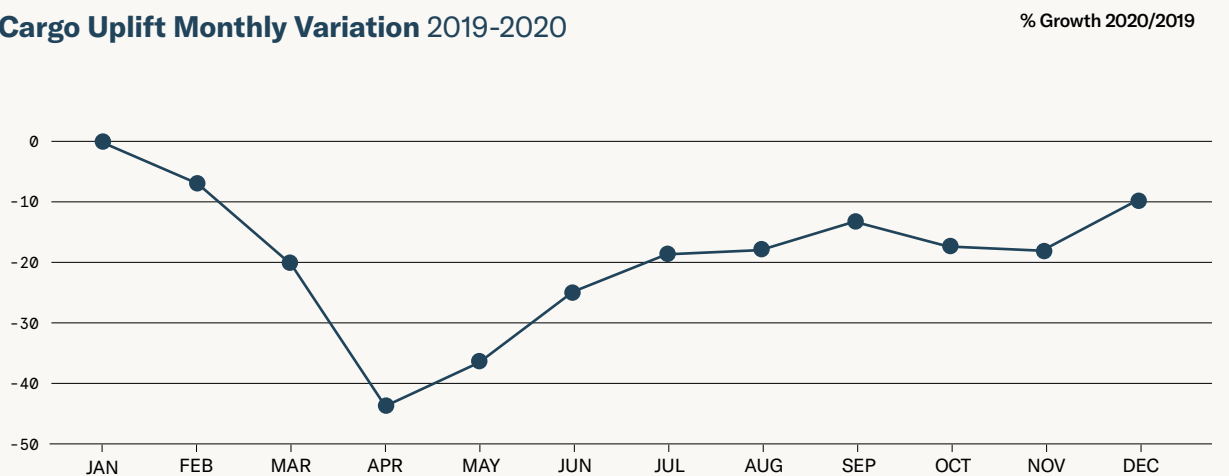
Cargo Uplift Development 2019-2020



Cargo Uplift Development 2019-2020



Cargo Uplift Monthly Variation 2019-2020



2 How Many Travelled Where

2020 passenger traffic at 8.08 million passengers, 17.5 million less compared to 2019

Overall, 2020 ended with traffic at Athens International Airport amounting to 8.08 million passengers, presenting a decline of 68.4% compared to the 2019, corresponding to a loss of 17.5 million passengers. This outcome was the result of a sharp traffic drop due to the Covid-19 pandemic from March to December 2020. In line with the industry-wide observations, domestic passengers were slightly less affected than international ones, presenting a 61.1% decrease compared to 2019, compared to 71.6% of the international traffic.

Travel restrictions were imposed worldwide, both by the Hellenic Republic as well as other countries, according to the epidemiological conditions and the national and international respective authorities' guidelines. The imposed travel restrictions were, at a large extent, determinant factors for the development of the passenger traffic between Athens and other destinations, both domestic and international. On the international front, travel restrictions for countries outside the EU, additional travel bans imposed by Greece to third countries (e.g. Turkey) and/or imposed by third countries (e.g. USA, Canada) significantly affected passenger traffic development. For instance, New York ended up accounting for only 4% of the airport's non-European scheduled destinations, as opposed to 14.7% in 2019. Traffic to certain countries within the EU, such as Italy and Spain, was also affected by restrictions imposed, based on these countries' epidemiological conditions. Traffic to Italy

declined by 78.4% and Spain by 78.3% compared to the previous year, the steepest decline amongst top international scheduled markets/countries for 2020. On the contrary, Austria's resilience in 2020 has to be underlined, since passenger traffic only declined by 41.9% compared to 2019, the most contained traffic decline among the top international scheduled markets.

Domestic traffic was also affected by international travel restrictions. Indicatively, Santorini's market share was significantly reduced from 15.5% to 8.9% compared to 2019, mainly due to its dependency on traffic originating from international destinations and transferring through Athens.

The public's inability or reluctance to travel by air during the pandemic is also highlighted in the sharp decline of the load factors that dropped from 80.9% in 2019 to 59.5% in 2020, also incorporating the pre-Covid-19 periods of January and February.

With the airport's traffic sharply reduced from March onwards, it comes as no surprise that the busiest days of 2020 were witnessed in January and February: Thursday 2nd January was the day with the highest number of passengers, namely 60,794, followed by days in the same period, characterised by the return wave of the holiday season travellers.

Monthly Passenger Distribution: Arrivals/Departures

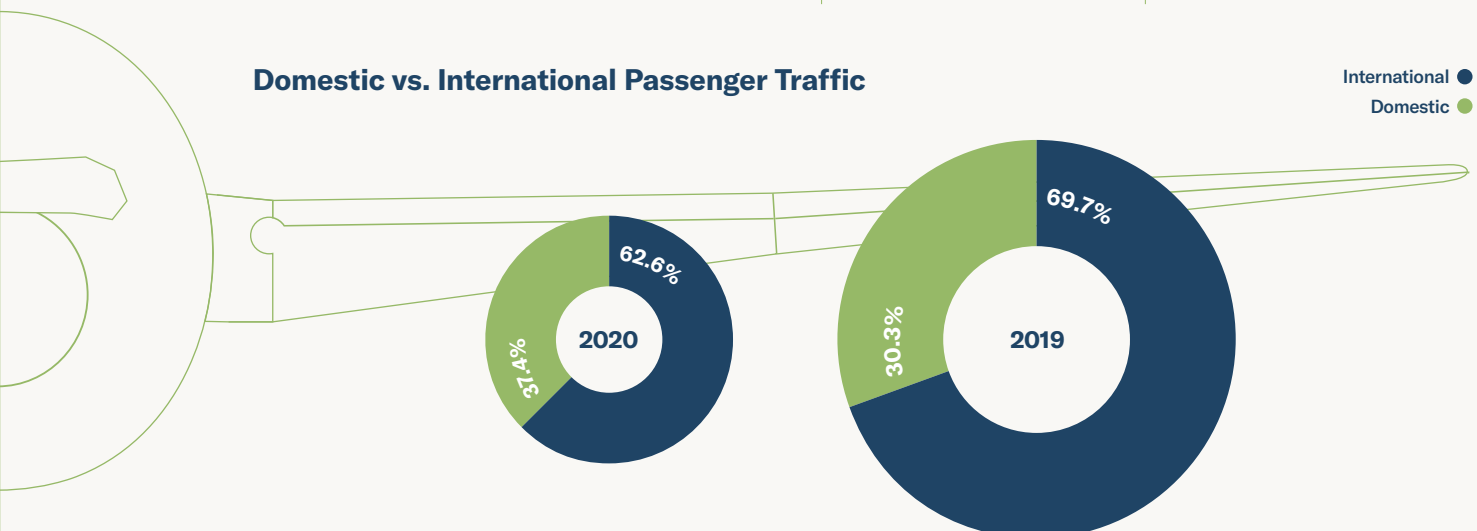
Month	Arriving Passengers		Departing Passengers		Transit Passengers		Total Passengers	
	2020	%20/19	2020	%20/19	2020	%20/19	2020	%20/19
January	718,077	5.5%	740,683	5.2%	13,976	69.0%	1,472,736	5.7%
February	683,646	2.4%	674,373	3.1%	6,612	12.6%	1,364,631	2.8%
March	322,404	-61.3%	313,388	-61.2%	3,989	-66.2%	639,781	-61.3%
April	11,444	-98.9%	9,040	-99.1%	2,844	-44.8%	23,328	-98.8%
May	44,715	-96.2%	37,922	-96.6%	1,384	-87.6%	84,021	-96.3%
June	169,240	-87.4%	144,113	-88.6%	2,296	-55.7%	315,649	-87.9%
July	487,584	-68.0%	404,160	-72.1%	1,878	-79.3%	893,622	-70.0%
August	591,956	-60.3%	608,896	-60.5%	2,669	-59.3%	1,203,521	-60.4%
September	414,334	-68.5%	443,948	-67.6%	3,834	-24.7%	862,116	-67.9%
October	347,569	-68.7%	368,914	-68.8%	3,453	-50.4%	719,936	-68.7%
November	115,578	-85.7%	146,061	-82.8%	1,383	-82.2%	263,022	-84.2%
December	122,311	-85.3%	111,340	-86.0%	2,380	-73.3%	236,031	-85.6%
Year Total	4,028,858	-68.5%	4,002,838	-68.4%	46,698	-49.1%	8,078,394	-68.4%

Monthly Terminal Passenger Distribution: Domestic/International

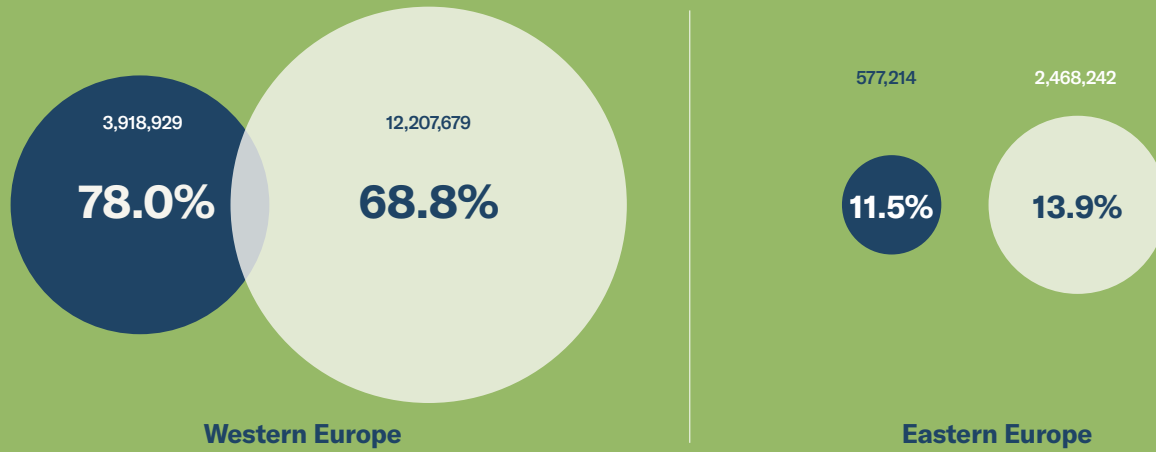
Month	Domestic Passengers		International Passengers		Total Terminal Passengers	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
January	432,950	-3.6%	1,025,810	9.6%	1,458,760	5.4%
February	422,733	-4.5%	935,286	6.4%	1,358,019	2.7%
March	207,327	-59.8%	428,465	-61.9%	635,792	-61.3%
April	11,842	-97.9%	8,642	-99.4%	20,484	-99.0%
May	58,016	-91.7%	24,621	-98.4%	82,637	-96.4%
June	195,411	-75.4%	117,942	-93.5%	313,353	-88.0%
July	399,506	-56.3%	492,238	-76.1%	891,744	-70.0%
August	483,675	-47.1%	717,177	-66.2%	1,200,852	-60.4%
September	338,850	-58.1%	519,432	-72.3%	858,282	-68.0%
October	264,729	-60.3%	451,754	-72.2%	716,483	-68.8%
November	99,162	-80.0%	162,477	-86.0%	261,639	-84.2%
December	91,951	-80.2%	141,700	-87.8%	233,651	-85.6%
Year Total	3,006,152	-61.1%	5,025,544	-71.7%	8,031,696	-68.5%

Domestic vs. International Passenger Traffic

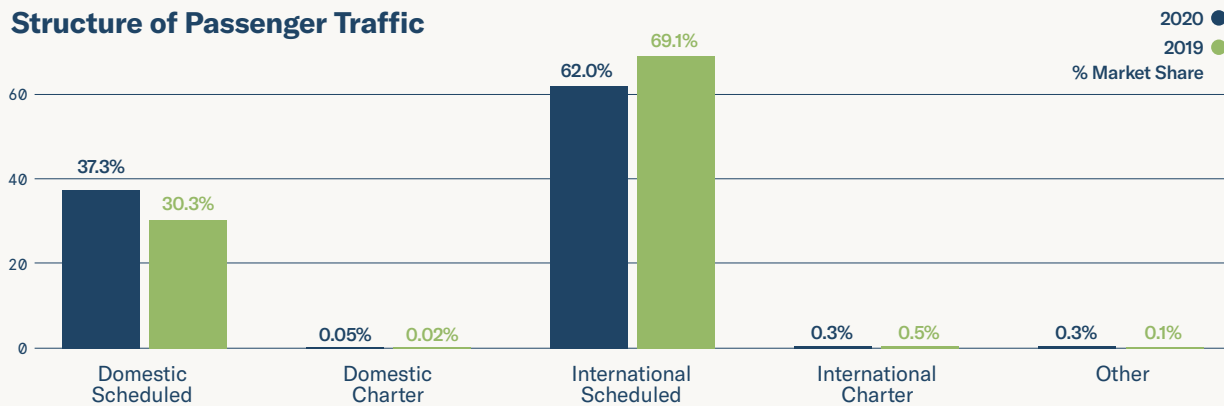
International ●
Domestic ●



Segmentation of International Passenger Traffic by Geographical Region

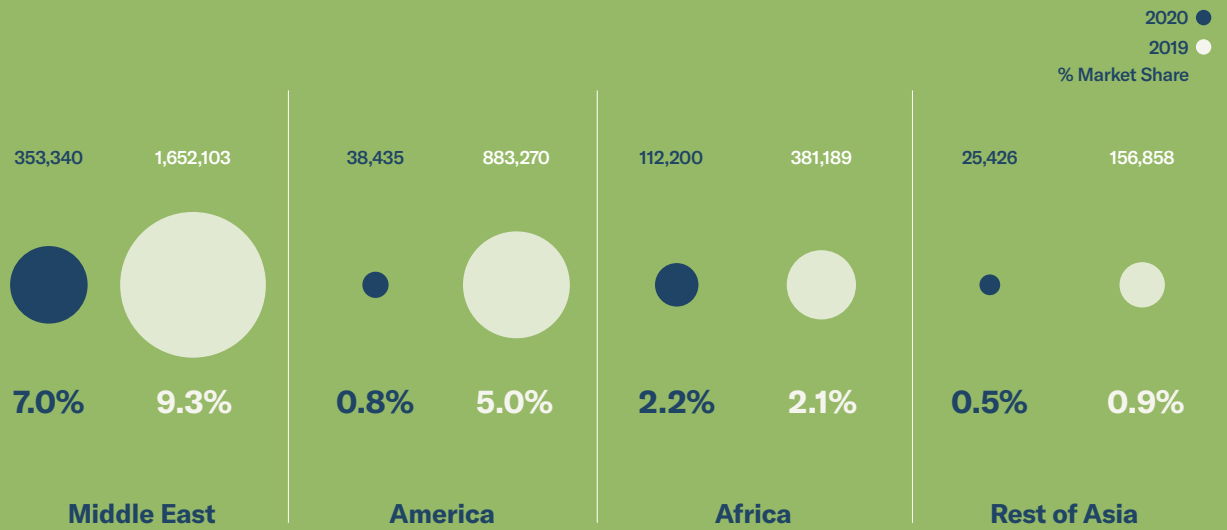


Structure of Passenger Traffic

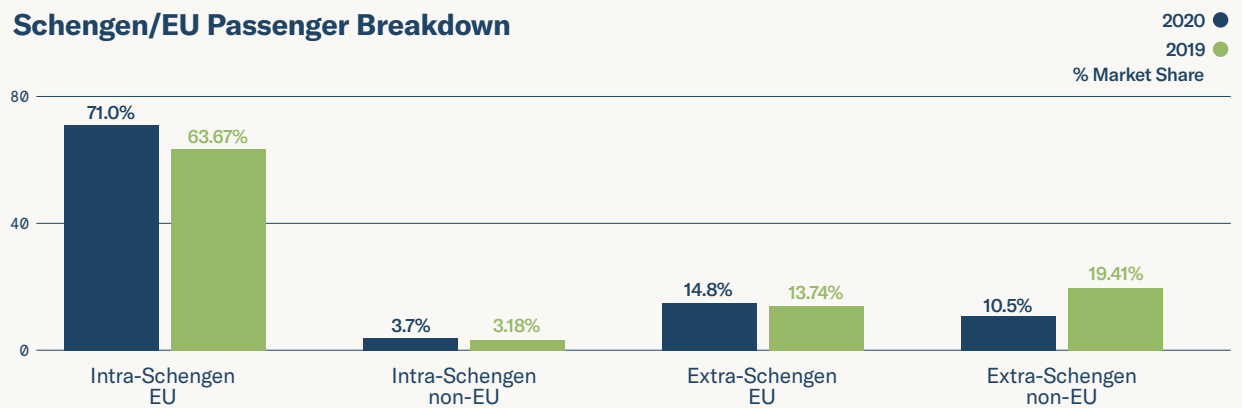


Monthly Terminal Passenger Distribution: Scheduled/Non-Scheduled

Month	Scheduled		Non-Scheduled		Commercial		Non-Commercial	
	2020	%20/19	2020	%20/19	2020	%20/19	2020	%20/19
January	1,452,543	5.3%	5,232	16.5%	313	72.9%	672	21.1%
February	1,354,320	2.7%	2,552	-9.0%	529	5777.8%	618	31.5%
March	632,394	-61.3%	2,700	-48.0%	509	12625.0%	189	-77.8%
April	18,073	-99.1%	2,317	-79.1%	22	266.7%	72	-93.8%
May	78,769	-96.5%	3,819	-77.6%	5	-98.5%	44	-95.3%
June	310,168	-88.0%	2,837	-87.0%	65	-81.7%	283	-76.0%
July	886,305	-70.0%	4,658	-76.8%	23	-88.9%	758	-57.1%
August	1,194,757	-60.3%	4,809	-80.8%	35	75.0%	1,251	-7.9%
September	851,210	-68.0%	5,726	-71.7%	6	-86.0%	1,340	31.9%
October	708,090	-69.0%	6,790	-32.3%	15	650.0%	1,588	96.8%
November	257,942	-84.4%	3,281	-31.3%	7	-97.5%	409	-0.2%
December	230,083	-85.8%	3,145	-63.0%	2	-99.5%	421	-42.8%
Year Total	7,974,654	-68.5%	47,866	-68.3%	1,531	-16.3%	7,645	-32.0%



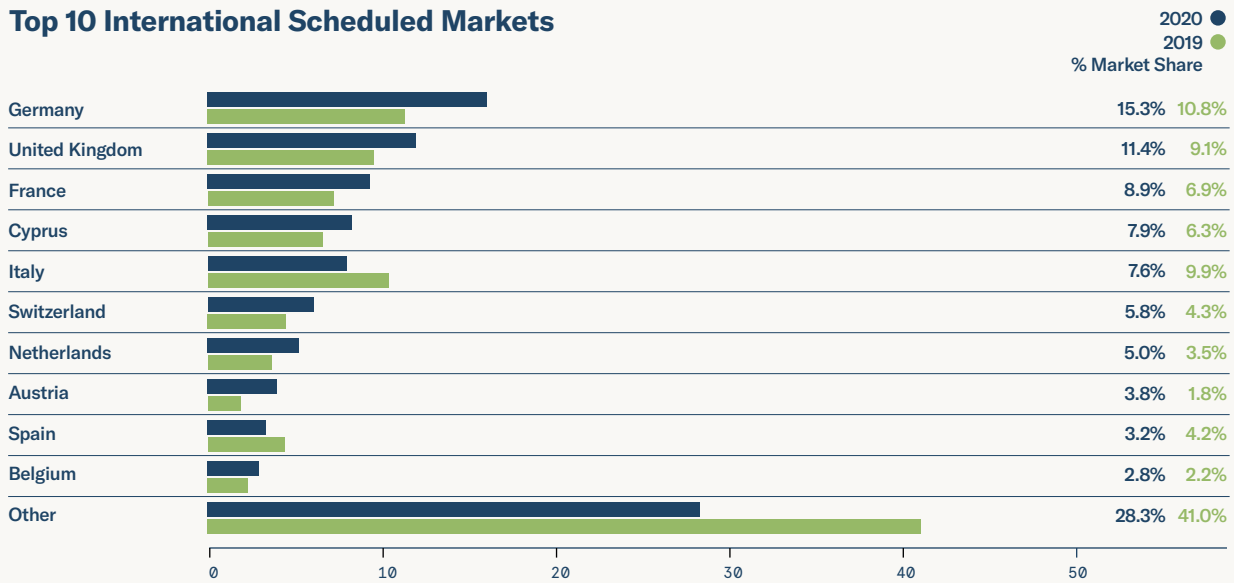
Schengen/EU Passenger Breakdown



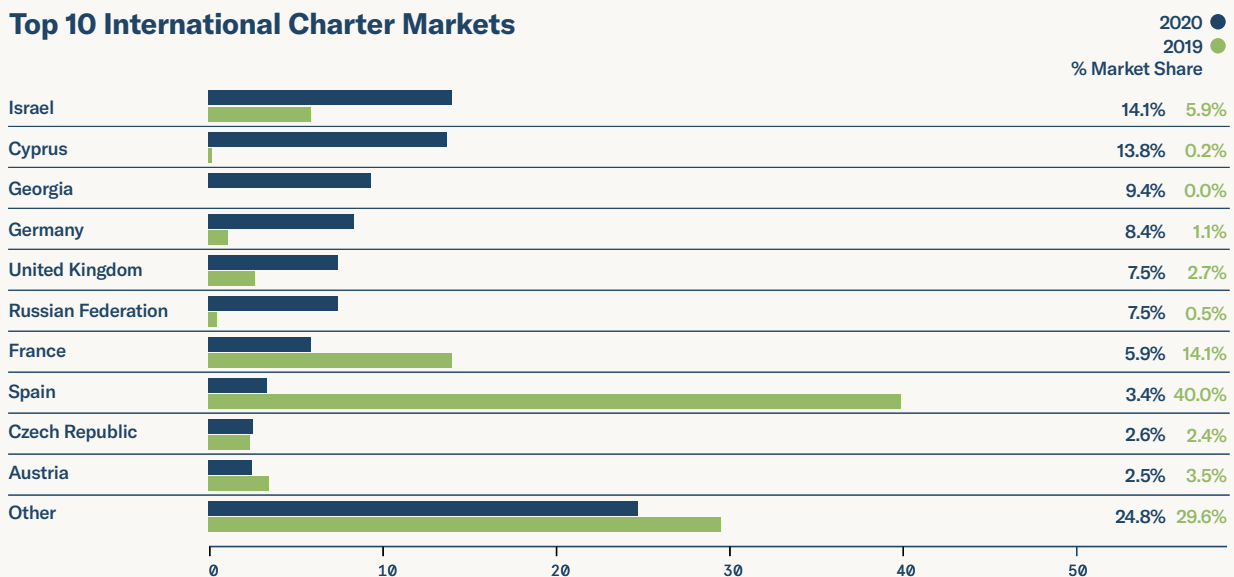
Monthly Terminal Passenger Distribution: Intra-/Extra-Schengen

Month	Intra Schengen		Extra Schengen		Total Terminal Passengers	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
January	958,720	2.5%	500,040	11.3%	1,458,760	5.4%
February	917,988	1.3%	440,031	5.8%	1,358,019	2.7%
March	424,158	-62.6%	211,634	-58.3%	635,792	-61.3%
April	16,569	-98.8%	3,915	-99.4%	20,484	-99.0%
May	75,136	-95.1%	7,501	-99.0%	82,637	-96.4%
June	278,078	-83.8%	35,275	-96.0%	313,353	-88.0%
July	755,836	-61.6%	135,908	-86.4%	891,744	-70.0%
August	995,229	-50.7%	205,623	-79.7%	1,200,852	-60.4%
September	679,514	-61.3%	178,768	-80.8%	858,282	-68.0%
October	551,376	-63.9%	165,107	-78.5%	716,483	-68.8%
November	184,765	-83.3%	76,874	-86.1%	261,639	-84.2%
December	162,303	-85.0%	71,348	-86.9%	233,651	-85.6%
Year Total	5,999,672	-64.8%	2,032,024	-75.9%	8,031,696	-68.5%

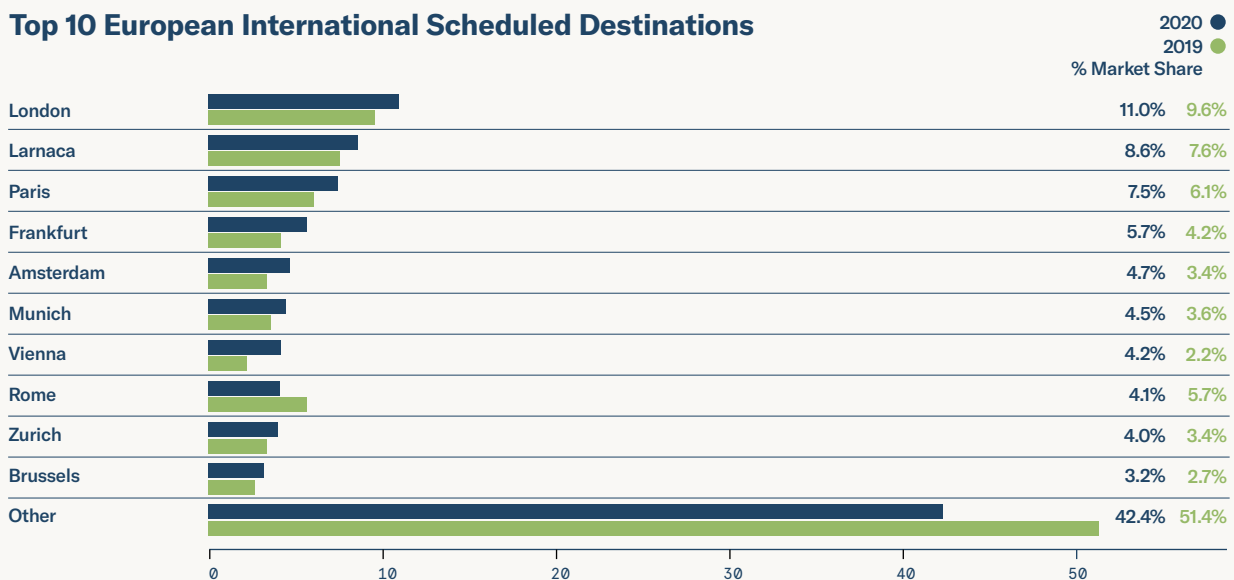
Top 10 International Scheduled Markets



Top 10 International Charter Markets



Top 10 European International Scheduled Destinations



Top 10 International Scheduled Markets/Countries

Ranking	Country	Scheduled Passengers 2020	Market Share 2020	%2020/2019
1	Germany	761,252	15.3%	-60.0%
2	United Kingdom	565,309	11.4%	-64.9%
3	France	445,205	8.9%	-63.1%
4	Cyprus	395,454	7.9%	-64.3%
5	Italy	376,404	7.6%	-78.4%
6	Switzerland	289,577	5.8%	-61.7%
7	Netherlands	246,648	5.0%	-60.0%
8	Austria	188,149	3.8%	-41.9%
9	Spain	158,985	3.2%	-78.3%
10	Belgium	141,694	2.8%	-63.9%
Other	Other	1,409,028	28.3%	-80.5%
	Total	4,977,705	100.0%	-71.7%

Top 10 International Charter Markets/Countries

Ranking	Country	Charter Passengers 2020	Market Share 2020	%2020/2019
1	Israel	3,945	14.1%	-47.3%
2	Cyprus	3,848	13.8%	1330.5%
3	Georgia	2,620	9.4%	-
4	Germany	2,332	8.4%	72.7%
5	United Kingdom	2,094	7.5%	-38.5%
6	Russian Federation	2,093	7.5%	211.9%
7	France	1,657	5.9%	-90.7%
8	Spain	944	3.4%	-98.1%
9	Czech Republic	724	2.6%	-76.1%
10	Austria	711	2.5%	-83.9%
Other	Other	6,924	24.8%	-81.6%
	Total	27,892	100.0%	-78.0%

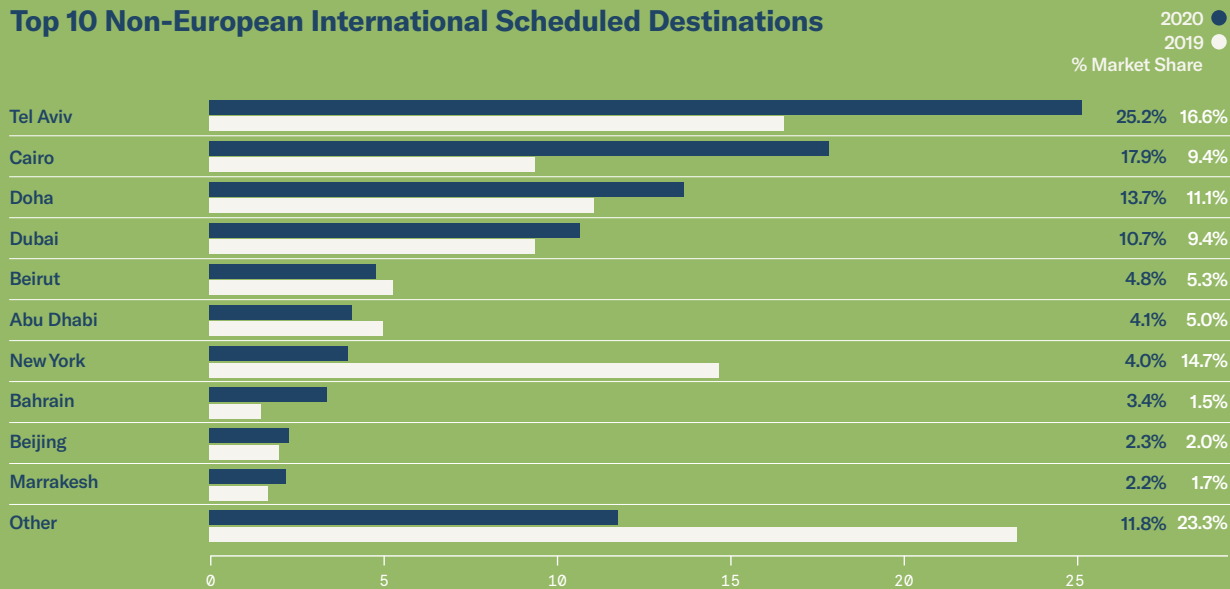
Top 10 European International Scheduled Destinations

Ranking	City	Scheduled Passengers 2020	Market Share 2020	%2020/2019
1	London	490,316	11.0%	-65.0%
2	Larnaca	384,377	8.6%	-65.2%
3	Paris	336,057	7.5%	-62.3%
4	Frankfurt	255,207	5.7%	-58.7%
5	Amsterdam	210,408	4.7%	-57.8%
6	Munich	200,603	4.5%	-61.5%
7	Vienna	188,149	4.2%	-41.9%
8	Rome	180,979	4.1%	-78.0%
9	Zurich	179,988	4.0%	-63.8%
10	Brussels	141,694	3.2%	-63.9%
Other	Other	1,889,654	42.4%	-74.7%
	Total	4,457,432	100.0%	-69.3%

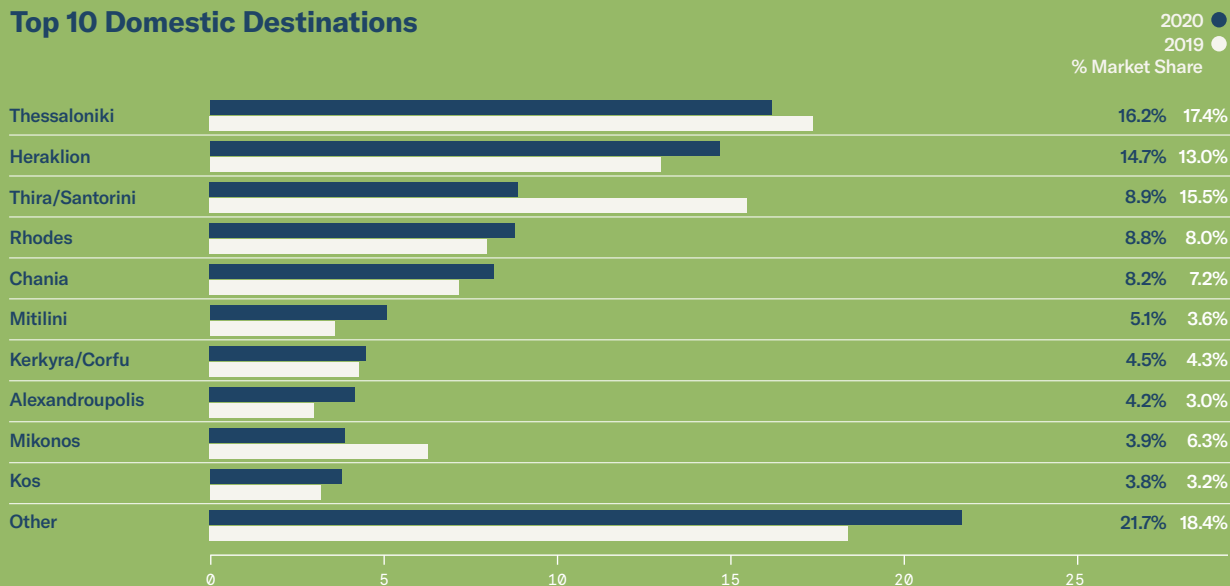
Top 10 non-European International Scheduled Destinations

Ranking	City	Scheduled Passengers 2020	Market Share 2020	%2020/2019
1	Tel Aviv	131,291	16.6%	-74.2%
2	Cairo	92,893	9.4%	-67.8%
3	Doha	71,416	11.1%	-78.9%
4	Dubai	55,558	9.4%	-80.6%
5	Beirut	24,767	5.3%	-84.8%
6	Abu Dhabi	21,105	5.0%	-86.1%
7	New York	20,692	14.7%	-95.4%
8	Bahrain	17,558	1.5%	-60.7%
9	Beijing	11,814	2.0%	-80.8%
10	Marrakesh	11,627	1.7%	-77.9%
Other	Other	61,552	23.3%	-91.3%
	Total	520,273	100.0%	-83.0%

Top 10 Non-European International Scheduled Destinations



Top 10 Domestic Destinations



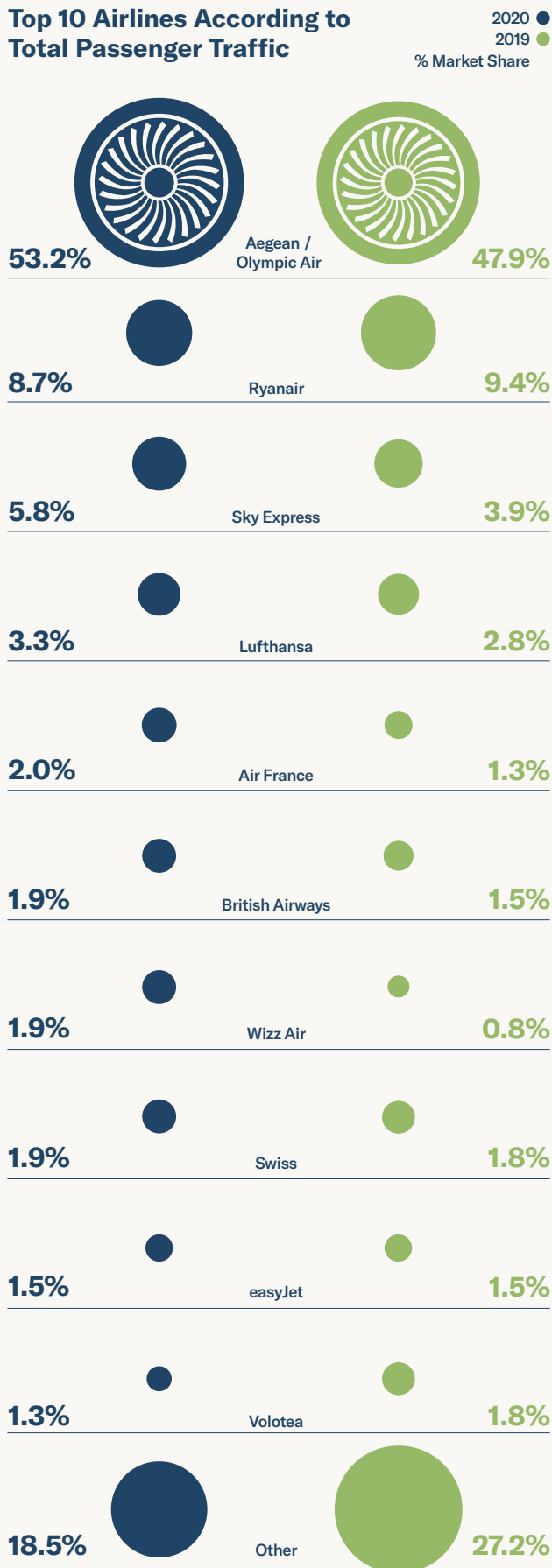
Ranking of International Destinations According to Passenger Traffic

		Scheduled & Charter Passengers 2020	Market Share 2020	% 2020 /2019			Scheduled & Charter Passengers 2020	Market Share 2020	% 2020 /2019
Country					Country				
1	Germany	763,584	15.3%	-59.9%	31	Malta	17,885	0.4%	-71.9%
2	United Kingdom	567,403	11.3%	-64.8%	32	Bahrain	17,558	0.4%	-60.7%
3	France	446,862	8.9%	-63.5%	33	Canada	17,529	0.4%	-94.1%
4	Cyprus	399,302	8.0%	-63.9%	34	Georgia	15,598	0.3%	-82.4%
5	Italy	377,074	7.5%	-78.5%	35	Luxembourg	15,066	0.3%	-32.6%
6	Switzerland	289,784	5.8%	-61.7%	36	People's Republic of China	13,765	0.3%	-77.7%
7	Netherlands	246,648	4.9%	-60.0%	37	Morocco	12,968	0.3%	-81.4%
8	Austria	188,860	3.8%	-42.5%	38	Jordan	12,072	0.2%	-84.9%
9	Spain	159,929	3.2%	-79.6%	39	Saudi Arabia	11,278	0.2%	-77.4%
10	Belgium	141,694	2.8%	-63.9%	40	Singapore	10,742	0.2%	-88.2%
11	Israel	135,236	2.7%	-73.8%	41	Finland	8,076	0.2%	-89.4%
12	Turkey	133,327	2.7%	-85.4%	42	Slovakia	6,058	0.1%	-84.7%
13	Romania	108,674	2.2%	-68.7%	43	Latvia	5,543	0.1%	-72.6%
14	Poland	104,107	2.1%	-74.2%	44	Armenia	5,358	0.1%	-85.9%
15	Egypt	93,155	1.9%	-69.1%	45	Ethiopia	5,169	0.1%	513.9%
16	United Arab Emirates	77,026	1.5%	-82.4%	46	Croatia	4,179	0.1%	-95.6%
17	Bulgaria	74,580	1.5%	-68.3%	47	Norway	3,563	0.1%	-93.3%
18	Qatar	71,416	1.4%	-78.9%	48	Lithuania	2,975	0.1%	-92.6%
19	Denmark	64,678	1.3%	-71.8%	49	Oman	1,493	0.0%	-92.7%
20	Hungary	61,146	1.2%	-70.6%	50	Moldova	896	0.0%	-95.4%
21	Albania	47,423	0.9%	-61.6%	51	Rep. of North Macedonia	858	0.0%	-88.4%
22	Russian Federation	44,214	0.9%	-86.7%	52	India	219	0.0%	-
23	Serbia	33,840	0.7%	-79.2%	53	Philippines	214	0.0%	-
24	Sweden	30,693	0.6%	-76.7%	54	Iraq	175	0.0%	-
25	Ukraine	30,425	0.6%	-82.4%	55	Indonesia	151	0.0%	-
26	Republic of Ireland	29,841	0.6%	-70.4%	56	Slovenia	136	0.0%	-
27	Czech Republic	28,451	0.6%	-73.9%	57	Bosnia and Herzegovina	50	0.0%	-
28	Lebanon	24,783	0.5%	-84.8%	58	Azerbaijan	41	0.0%	-
29	Portugal	21,053	0.4%	-82.7%	59	Iran	7	0.0%	-
30	USA	20,692	0.4%	-96.5%	60	Sudan	4	0.0%	-
					Total	5,005,597	100.0%	-71.8%	

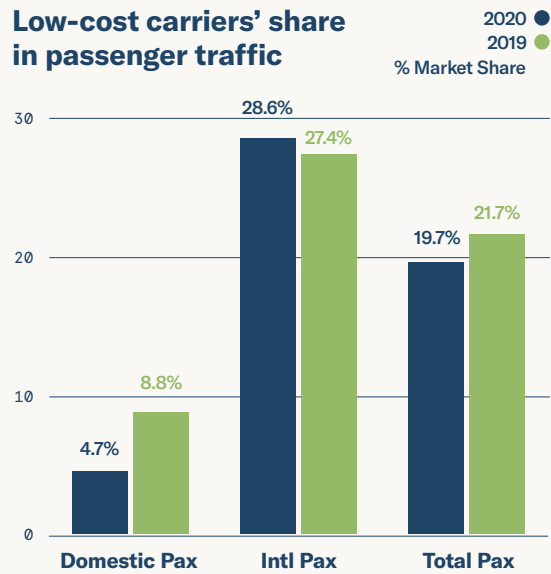
Ranking of Domestic Destinations According to Passenger Traffic

		Scheduled & Charter Passengers 2020	Market Share 2020	% 2020 /2019			Scheduled & Charter Passengers 2020	Market Share 2020	% 2020 /2019
City					City				
1	Thessaloniki	486,858	16.2%	-63.9%	17	Milos	36,259	1.2%	-53.6%
2	Heraklion	440,313	14.7%	-56.1%	18	Karpathos	29,823	1.0%	-44.1%
3	Thira/Santorini	267,414	8.9%	-77.6%	19	Kefallonia	28,687	1.0%	-67.2%
4	Rhodes	262,646	8.8%	-57.4%	20	Kavala	25,721	0.9%	-61.5%
5	Chania	245,708	8.2%	-56.0%	21	Zakynthos	25,135	0.8%	-71.8%
6	Mitilini	152,736	5.1%	-45.7%	22	Ikaria	20,279	0.7%	-49.9%
7	Kerkyra/Corfu	135,606	4.5%	-58.8%	23	Skiathos	19,290	0.6%	-61.8%
8	Alexandroupolis	126,669	4.2%	-46.2%	24	Kithira	13,386	0.4%	-60.7%
9	Mikonos	118,224	3.9%	-75.8%	25	Leros	11,504	0.4%	-49.5%
10	Kos	113,496	3.8%	-54.4%	26	Sitia	10,238	0.3%	-53.1%
11	Chios	99,748	3.3%	-48.6%	27	Astypalea	7,941	0.3%	-43.5%
12	Paros	93,755	3.1%	-53.6%	28	Syros	7,354	0.2%	-42.4%
13	Samos	78,911	2.6%	-43.8%	29	Skiros	5,669	0.2%	-43.8%
14	Naxos	52,434	1.7%	-49.4%	30	Kalimnos	5,215	0.2%	-41.6%
15	Limnos	39,982	1.3%	-44.8%	31	Kozani	1,582	0.1%	-66.7%
16	Ioannina	36,690	1.2%	-64.7%	32	Kastoria	1,537	0.1%	-46.2%
					Total	3,000,859	100.0%	-61.2%	

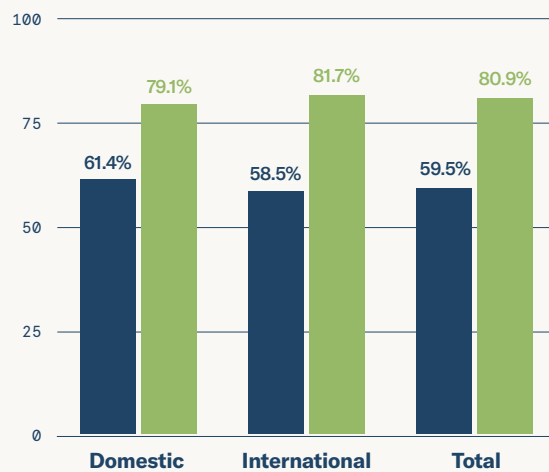
Top 10 Airlines According to Total Passenger Traffic



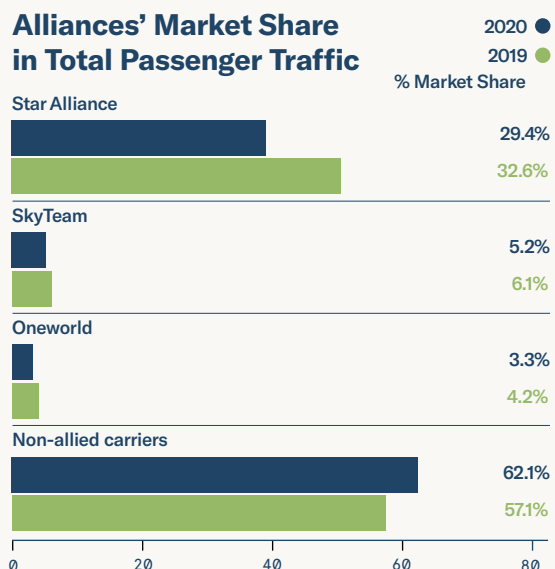
Low-cost carriers' share in passenger traffic



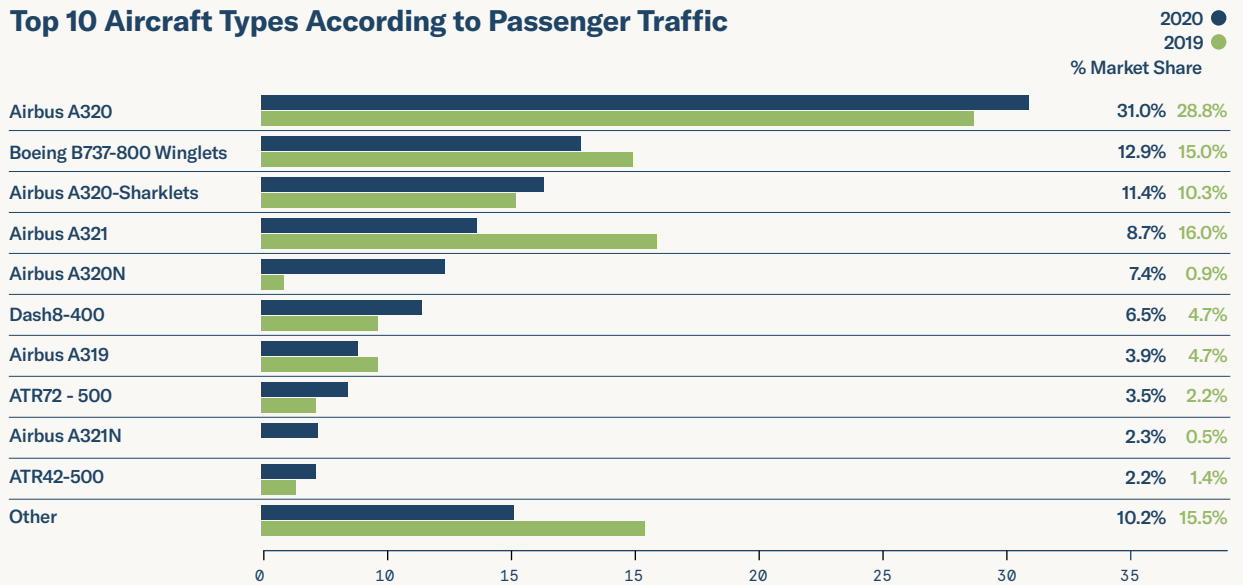
Load Factors of Non-Stop Flights Annual Development 2019-2020



Alliances' Market Share in Total Passenger Traffic



Top 10 Aircraft Types According to Passenger Traffic



Peak and Average Daily Passenger Traffic

Month	Ranking	Day	Date	Terminal Passengers
10 Busiest Days	1	Thursday	02/01/2020	60,794
	2	Sunday	05/01/2020	60,784
	3	Friday	03/01/2020	59,458
	4	Monday	06/01/2020	56,118
	5	Friday	21/02/2020	55,800
	6	Saturday	04/01/2020	55,631
	7	Sunday	23/02/2020	55,380
	8	Sunday	16/02/2020	54,851
	9	Friday	14/02/2020	53,724
	10	Friday	28/02/2020	51,609
30th Busiest Day	30	Wednesday	26/02/2020	46,100
Average Day		Friday	30/10/2020	22,049

Average Day = Day with passenger traffic closest to the average (8,031,696/366=21,945)

Daily Passenger Peaks

	Busiest Days	Day	Date	Terminal Passengers
Domestic	Arrivals	Sunday	23/08/2020	10,820
	Departures	Friday	07/08/2020	10,139
	Total	Sunday	09/08/2020	18,215
International	Arrivals	Thursday	02/01/2020	22,022
	Departures	Thursday	02/01/2020	24,355
	Total	Thursday	02/01/2020	46,377
Total	Arrivals	Thursday	02/01/2020	29,767
	Departures	Sunday	05/01/2020	31,860
	Total	Thursday	02/01/2020	60,794

3 Counting Airplanes

Aircraft movements stood at 112.4 thousand in 2020, 50.2% below 2019

In 2020, flights at the Athens International Airport stood at 112.4 thousand, 50.2% below 2019, witnessing a relatively milder decline than that of passenger demand, with domestic operations down by 44.8% and international by 54.0% compared to the respective 2019 figures.

Throughout the year, capacity roughly followed a pattern similar to that of passenger demand with travel bans and restrictions being the key determinant factors. The decline however was slightly milder than that of passenger demand, an indication of airlines attempting to keep the aviation industry alive.

Domestic services' market share somewhat improved from 41.8% in 2019 to 46.2% in 2020 since the domestic market experienced extended periods of restricted operations only during the two national lockdown periods (March to May and November to December) and it was the first one to be gradually reinstated since mid-May.

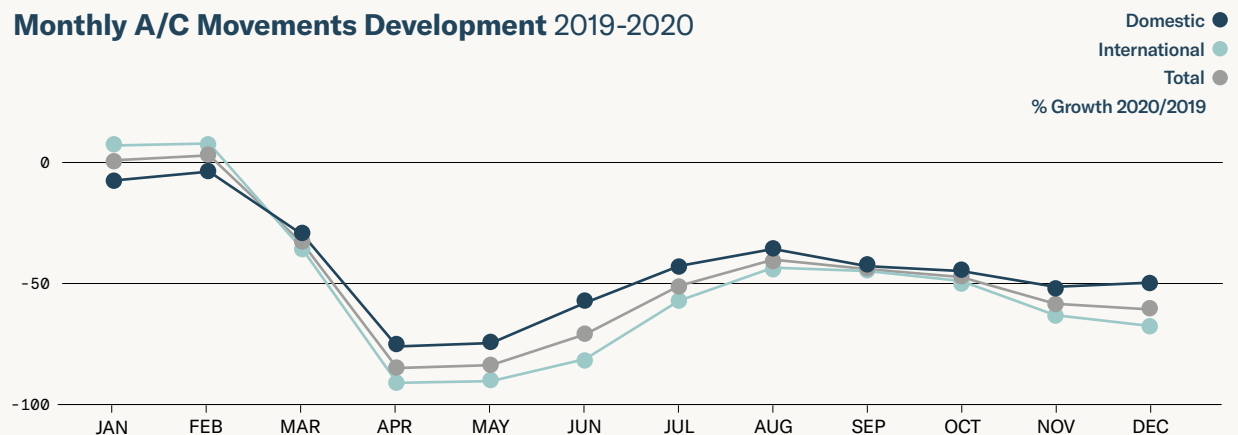
In 2020, the international flights' share to/from Western Europe rose to 74.1%, compared to 69% in 2019, as travelling was relatively unrestricted within the EU/Schengen area, with only some exceptions. Out of the top-10 international markets/countries for scheduled passenger movements, only Italy, Spain and Turkey reduced their market share

compared to 2019, mainly due to Greece's travel restrictions. The difficult epidemiological situation in Italy and Spain also decisively contributed to reduced passenger demand, reflecting the public's reluctance to travel to these destinations.

Airbus 320 was the most commonly used aircraft type to/from Athens, similarly with previous years, while the limited passenger demand, combined with the increased share of domestic services and the minimal long-haul services, resulted in a significant decline in the use of larger aircraft. Airbus 321 saw its market share drop from 10.5% in 2019 to 4.3% in 2020, while Boeing B737-800 Winglets also went down from 10.9% to 8.9%.

Contrary to passenger traffic that peaked before the Covid-19 outbreak, the busiest day of 2020 in terms of aircraft movements, with 569 flights, was Friday 21st August, with the top-10 days in the same period. This outcome indicates the recovery observed during the summer holiday period. However, the peak of the international flights coincides with that of the international and total passenger traffic on 2nd January.

Monthly A/C Movements Development 2019-2020



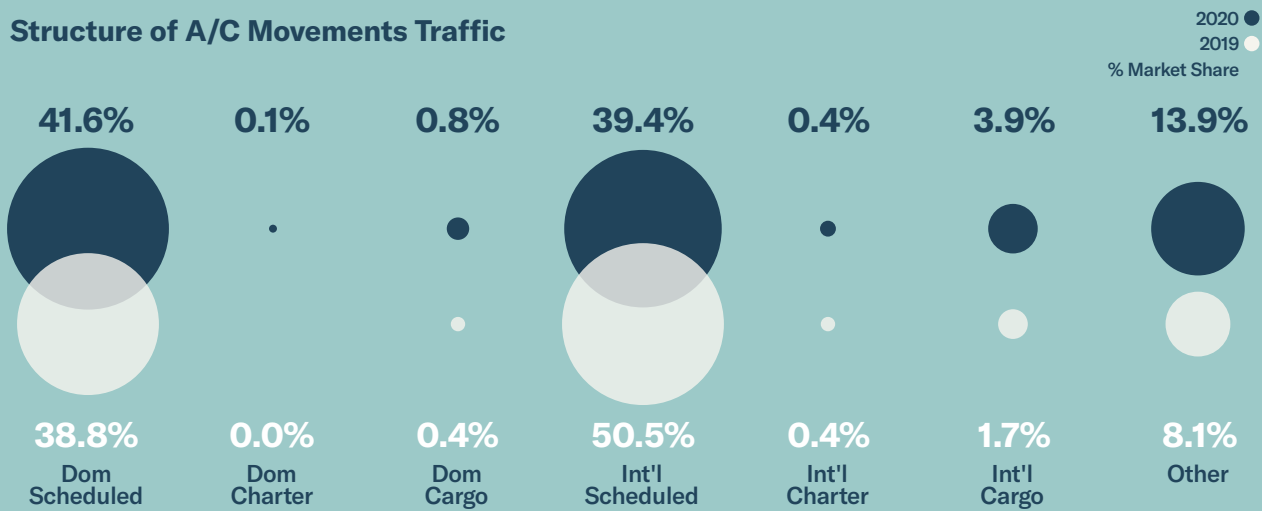
Monthly Distribution of A/C Movements: Arrivals/Departures

Month	Arrivals		Departures		Total	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
January	6,879	0.9%	6,886	0.8%	13,765	0.9%
February	6,276	2.8%	6,281	2.9%	12,557	2.9%
March	4,770	-33.5%	4,745	-33.9%	9,515	-33.7%
April	1,323	-84.9%	1,330	-84.8%	2,653	-84.8%
May	1,633	-83.7%	1,636	-83.6%	3,269	-83.6%
June	3,383	-70.9%	3,381	-70.9%	6,764	-70.9%
July	6,558	-50.8%	6,549	-51.0%	13,107	-50.9%
August	7,979	-40.1%	7,978	-40.1%	15,957	-40.1%
September	6,381	-44.0%	6,387	-44.0%	12,768	-44.0%
October	5,157	-47.3%	5,163	-47.3%	10,320	-47.3%
November	2,992	-58.5%	3,015	-58.2%	6,007	-58.3%
December	2,873	-60.5%	2,860	-60.6%	5,733	-60.6%
Year Total	56,204	-50.2%	56,211	-50.2%	112,415	-50.2%

Monthly Distribution of A/C Movements: Domestic/International

Month	Domestic		International		Total	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
January	5,365	-7.4%	8,400	7.0%	13,765	0.9%
February	5,002	-3.8%	7,555	7.8%	12,557	2.9%
March	4,107	-30.0%	5,408	-36.2%	9,515	-33.7%
April	1,703	-75.9%	950	-90.9%	2,653	-84.8%
May	2,125	-74.5%	1,144	-90.2%	3,269	-83.6%
June	4,301	-57.9%	2,463	-81.1%	6,764	-70.9%
July	6,543	-42.7%	6,564	-57.0%	13,107	-50.9%
August	7,295	-35.7%	8,662	-43.4%	15,957	-40.1%
September	5,589	-42.8%	7,179	-44.8%	12,768	-44.0%
October	4,367	-44.8%	5,953	-48.9%	10,320	-47.3%
November	2,785	-51.3%	3,222	-63.0%	6,007	-58.3%
December	2,795	-49.6%	2,938	-67.4%	5,733	-60.6%
Year Total	51,977	-44.8%	60,438	-54.0%	112,415	-50.2%

Structure of A/C Movements Traffic



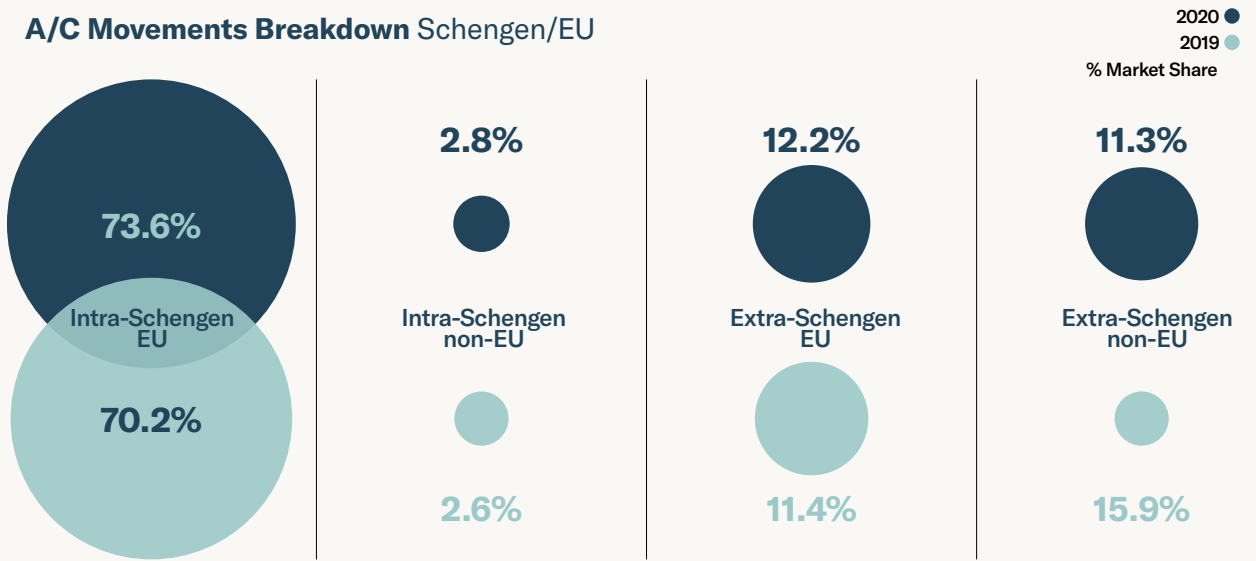
Monthly Distribution of A/C Movements by Flight Type

Month	Scheduled pax	Charter Pax	Scheduled Cargo	Charter Cargo	Commercial Other	Non-Commercial	Grand Total
January	12,524	36	364	2	383	456	13,765
February	11,390	23	338	0	333	473	12,557
March	8,252	36	363	8	462	394	9,515
April	1,602	26	395	56	341	233	2,653
May	2,134	55	428	47	389	216	3,269
June	5,055	35	480	8	660	526	6,764
July	10,337	35	476	17	1,411	831	13,107
August	12,914	25	424	6	1,786	802	15,957
September	10,116	57	435	21	1,194	945	12,768
October	7,902	78	407	30	1,160	743	10,320
November	4,543	56	449	10	475	474	6,007
December	4,235	42	478	19	551	408	5,733
Year Total	91,004	504	5,037	224	9,145	6,501	112,415

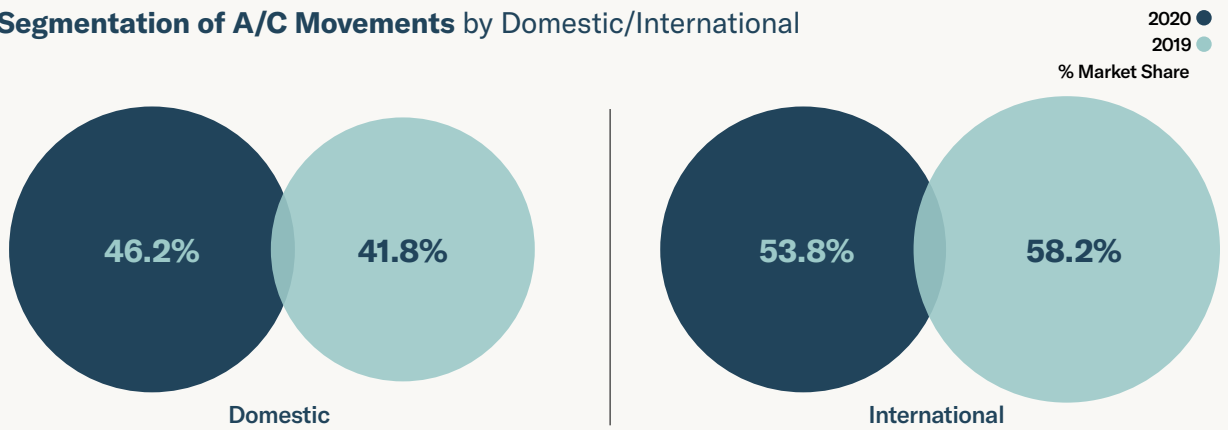
Monthly Distribution of A/C Movements Intra-/Extra-Schengen

Month	Intra-Schengen		Extra-Schengen		Total	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
January	9,419	-3.1%	4,346	10.8%	13,765	0.9%
February	8,723	0.6%	3,834	8.5%	12,557	2.9%
March	6,802	-33.9%	2,713	-33.3%	9,515	-33.7%
April	2,089	-83.6%	564	-88.1%	2,653	-84.8%
May	2,628	-82.2%	641	-87.8%	3,269	-83.6%
June	5,731	-66.6%	1,033	-83.1%	6,764	-70.9%
July	10,920	-45.0%	2,187	-68.0%	13,107	-50.9%
August	13,056	-34.4%	2,901	-56.9%	15,957	-40.1%
September	10,000	-39.9%	2,768	-55.0%	12,768	-44.0%
October	7,901	-43.8%	2,419	-56.0%	10,320	-47.3%
November	4,454	-56.1%	1,553	-63.7%	6,007	-58.3%
December	4,256	-57.9%	1,477	-66.7%	5,733	-60.6%
Year Total	85,979	-47.6%	26,436	-57.1%	112,415	-50.2%

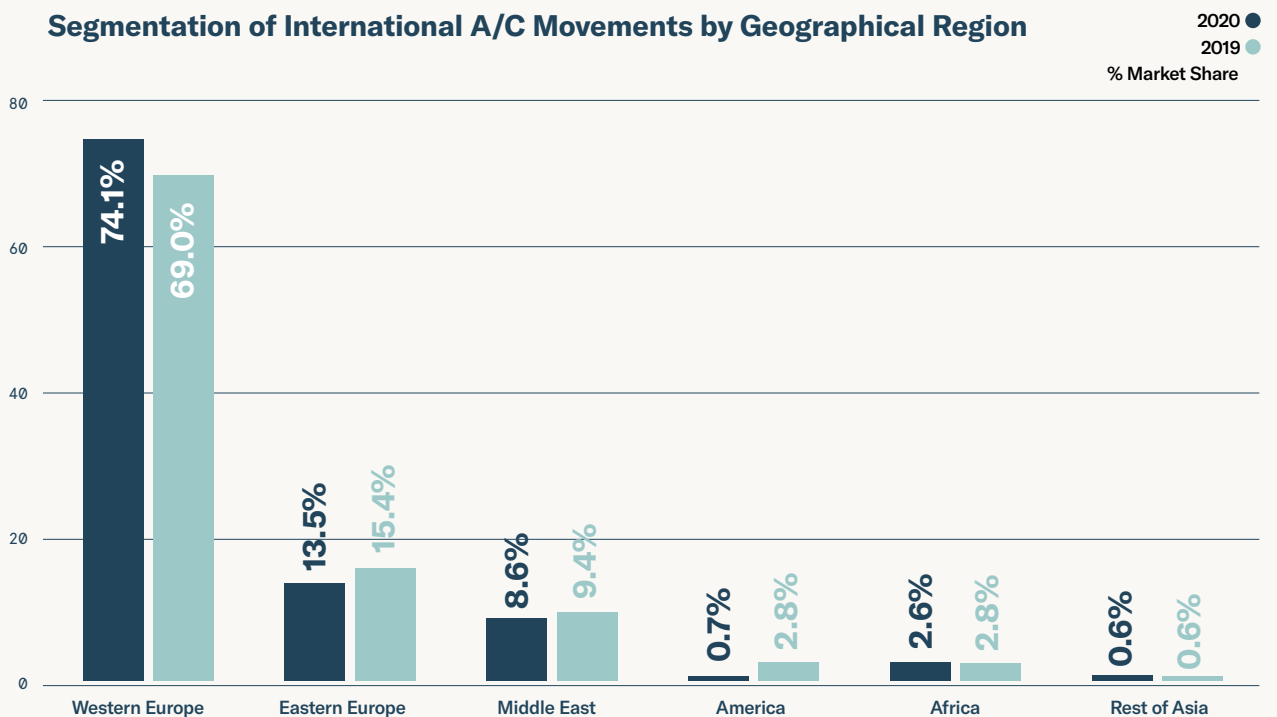
A/C Movements Breakdown Schengen/EU



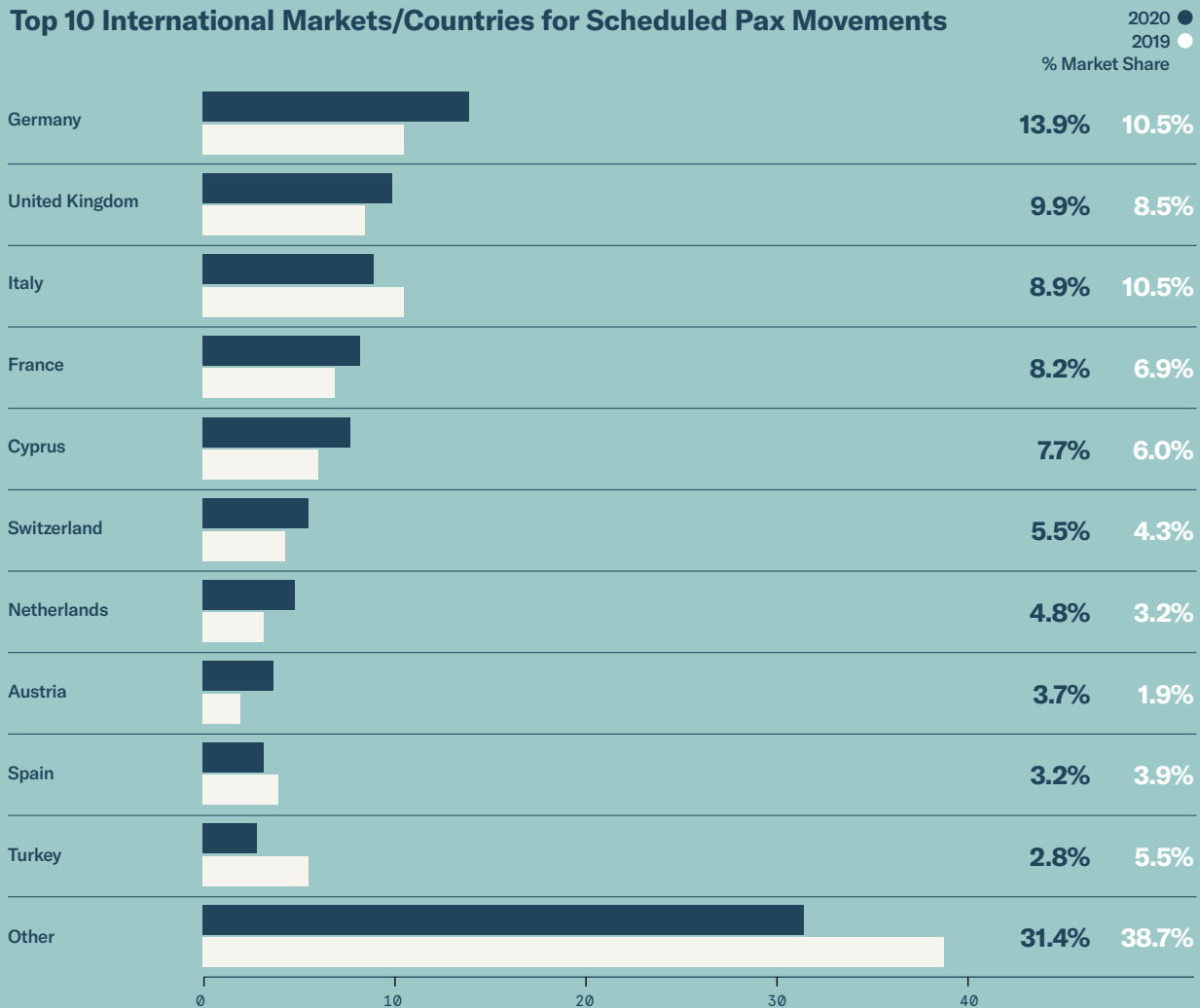
Segmentation of A/C Movements by Domestic/International



Segmentation of International A/C Movements by Geographical Region



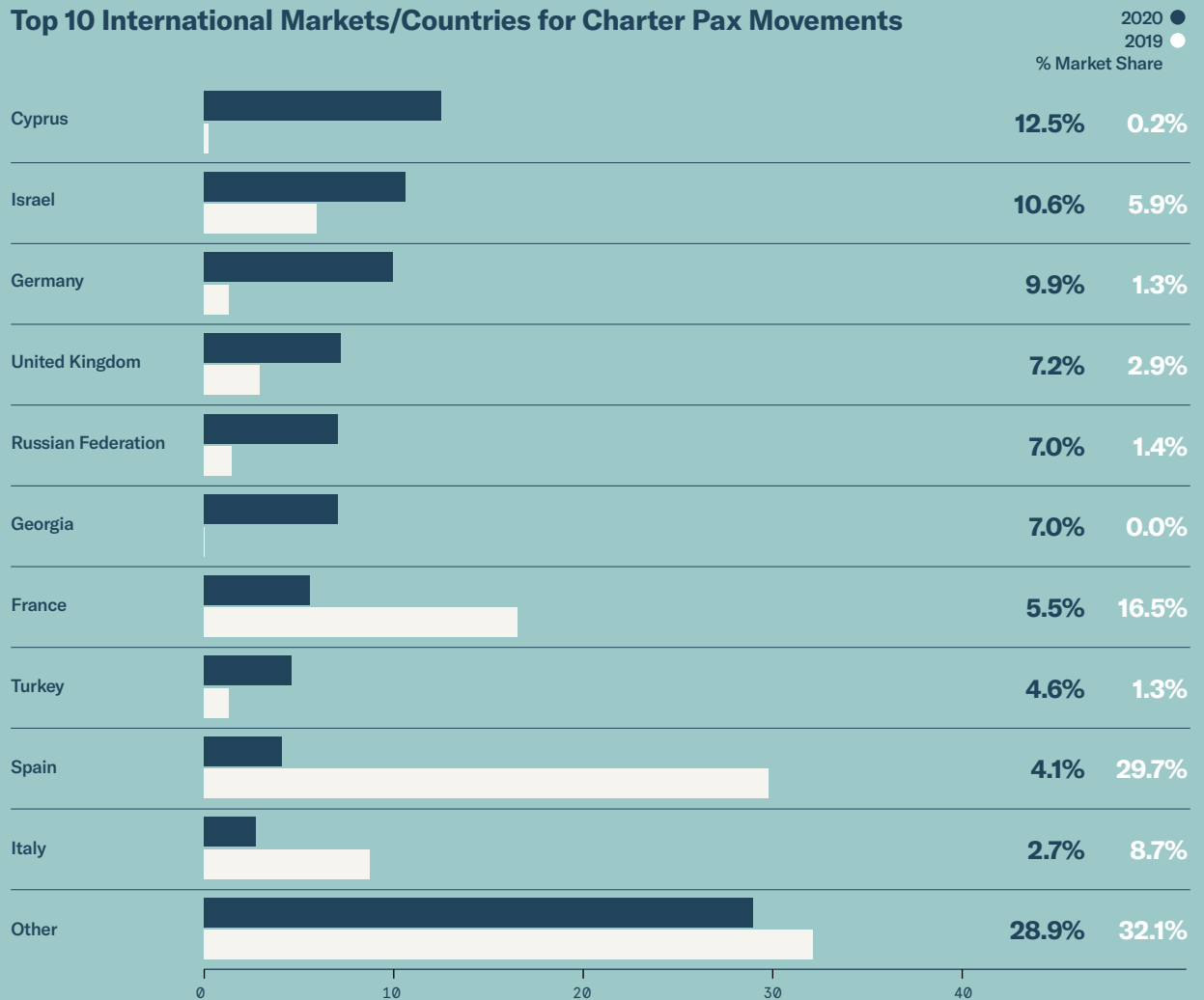
Top 10 International Markets/Countries for Scheduled Pax Movements



Top 10 International Markets/Countries for Scheduled Pax Movements

Ranking	Country	A/C Movements 2020	Market Share 2020	% 2020/2019
1	Germany	6,138	13.9%	-48.9%
2	United Kingdom	4,400	9.9%	-54.6%
3	Italy	3,923	8.9%	-67.4%
4	France	3,614	8.2%	-54.4%
5	Cyprus	3,414	7.7%	-50.1%
6	Switzerland	2,456	5.5%	-49.7%
7	Netherlands	2,117	4.8%	-42.0%
8	Austria	1,646	3.7%	-22.7%
9	Spain	1,432	3.2%	-67.5%
10	Turkey	1,241	2.8%	-80.3%
	Other	13,913	31.4%	-68.5%
	Total	44,294	100%	-61.1%

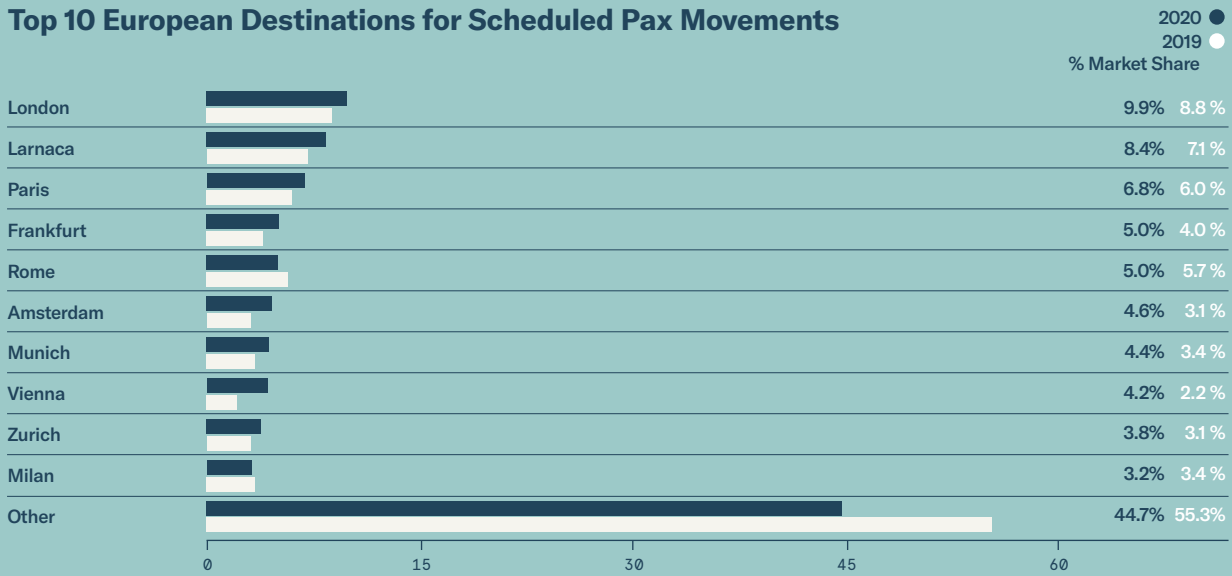
Top 10 International Markets/Countries for Charter Pax Movements



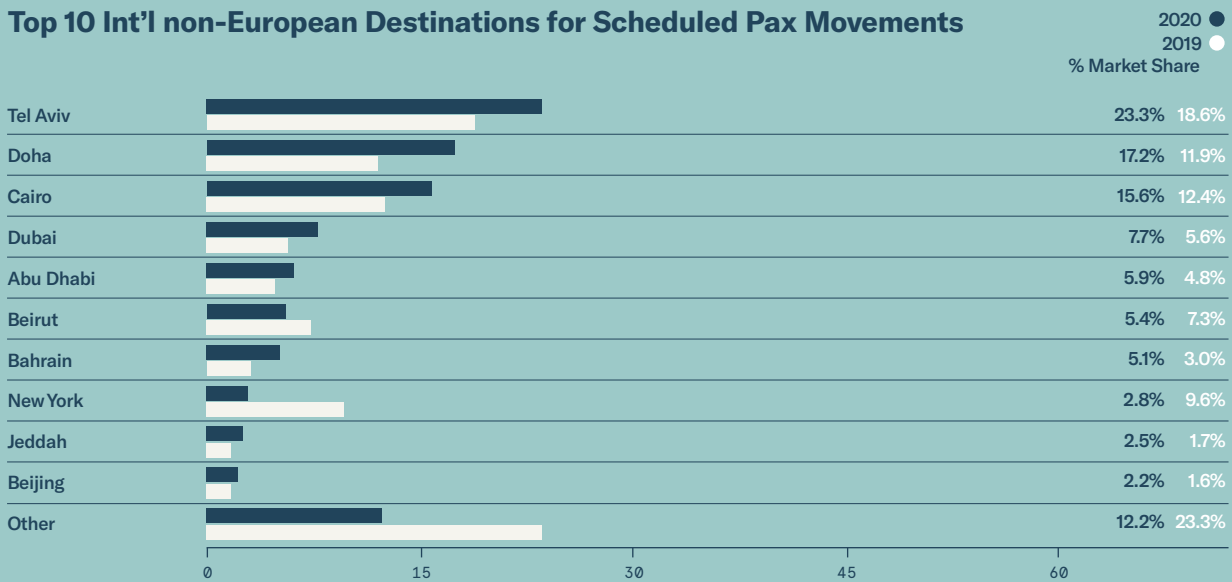
Top 10 International Markets/Countries for Charter Pax Movements

Ranking	Country	A/C Movements 2020	Market Share 2020	% 2020/2019
1	Cyprus	52	12.5%	2500.0%
2	Israel	44	10.6%	-13.7%
3	Germany	41	9.9%	272.7%
4	United Kingdom	30	7.2%	20.0%
5	Russian Federation	29	7.0%	141.7%
6	Georgia	29	7.0%	-
7	France	23	5.5%	-83.8%
8	Turkey	19	4.6%	72.7%
9	Spain	17	4.1%	-93.4%
10	Italy	11	2.7%	-85.3%
	Other	120	28.9%	-56.5%
	Total	415	100%	-51.8%

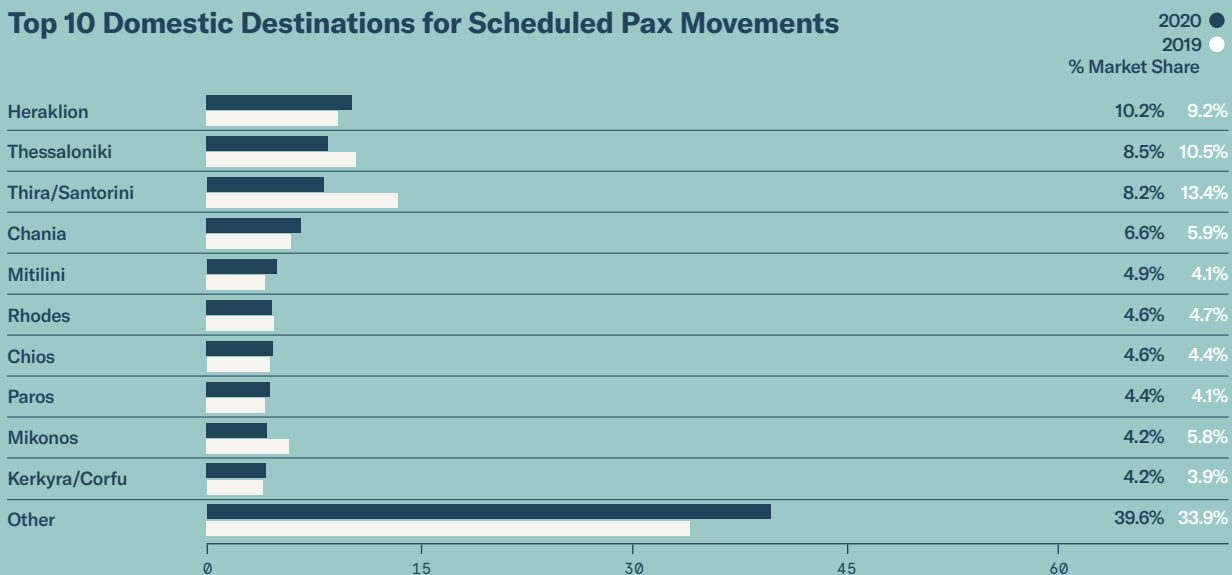
Top 10 European Destinations for Scheduled Pax Movements



Top 10 Int'l non-European Destinations for Scheduled Pax Movements



Top 10 Domestic Destinations for Scheduled Pax Movements



Ranking of International Markets/Countries According to A/C Movements

		Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019			Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019
Country					Country				
1	Germany	6,179	13.8%	-48.6%	32	Canada	162	0.4%	-85.9%
2	United Kingdom	4,430	9.9%	-54.4%	33	Jordan	158	0.4%	-81.9%
3	Italy	3,934	8.8%	-67.5%	34	Luxembourg	148	0.3%	-5.7%
4	France	3,637	8.1%	-54.9%	35	USA	145	0.3%	-93.8%
5	Cyprus	3,466	7.8%	-49.4%	36	Saudi Arabia	140	0.3%	-74.8%
6	Switzerland	2,459	5.5%	-49.7%	37	People's Rep. of China	128	0.3%	-55.9%
7	Netherlands	2,117	4.7%	-42.0%	38	Croatia	121	0.3%	-89.7%
8	Austria	1,653	3.7%	-23.9%	39	Morocco	121	0.3%	-79.0%
9	Spain	1,449	3.2%	-68.9%	40	Georgia	119	0.3%	-79.6%
10	Israel	1,272	2.8%	-63.6%	41	Ethiopia	117	0.3%	631.3%
11	Turkey	1,260	2.8%	-80.0%	42	Finland	80	0.2%	-83.8%
12	Belgium	1,226	2.7%	-53.1%	43	Latvia	76	0.2%	-56.3%
13	Romania	1,140	2.5%	-55.8%	44	Singapore	46	0.1%	-86.1%
14	Qatar	908	2.0%	-58.4%	45	Armenia	44	0.1%	-83.6%
15	Poland	869	1.9%	-64.5%	46	Rep. of North Macedonia	42	0.1%	-83.1%
16	Egypt	825	1.8%	-66.6%	47	Slovakia	40	0.1%	-83.7%
17	Bulgaria	738	1.7%	-56.7%	48	Lithuania	37	0.1%	-85.0%
18	United Arab Emirates	722	1.6%	-62.3%	49	Norway	32	0.1%	-91.0%
19	Hungary	570	1.3%	-54.8%	50	Oman	26	0.1%	-90.4%
20	Denmark	562	1.3%	-62.5%	51	Moldova	22	0.0%	-81.7%
21	Serbia	517	1.2%	-64.3%	52	Iraq	3	0.0%	50.0%
22	Russian Federation	485	1.1%	-80.8%	53	Slovenia	3	0.0%	-
23	Albania	418	0.9%	-51.1%	54	Bosnia & Herzegovina	2	0.0%	-
24	Republic of Ireland	286	0.6%	-53.7%	55	Azerbaijan	2	0.0%	-
25	Lebanon	285	0.6%	-78.8%	56	Sudan	2	0.0%	-
26	Ukraine	270	0.6%	-77.0%	57	India	1	0.0%	-
27	Bahrain	270	0.6%	-50.4%	58	Indonesia	1	0.0%	-
28	Sweden	269	0.6%	-70.0%	59	Iran	1	0.0%	-
29	Czech Republic	249	0.6%	-66.4%	60	Pakistan	1	0.0%	-
30	Malta	230	0.5%	-57.6%	61	Philippines	1	0.0%	-
31	Portugal	192	0.4%	-75.4%		Total	44,709	100.0%	-61.1%

Ranking of Domestic Destinations According to A/C Movements

		Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019			Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019
City					City				
1	Heraklion	4,758	10.2%	-41.1%	17	Ioannina	897	1.9%	-51.5%
2	Thessaloniki	4,033	8.6%	-56.2%	18	Zakinthos	892	1.9%	-49.9%
3	Thira/Santorini	3,838	8.2%	-67.4%	19	Kefallonia	811	1.7%	-48.1%
4	Chania	3,064	6.5%	-40.4%	20	Karpathos	811	1.7%	-23.1%
5	Mitilini	2,288	4.9%	-36.5%	21	Skiathos	687	1.5%	-34.4%
6	Rhodes	2,164	4.6%	-47.7%	22	Ikaria	617	1.3%	-46.4%
7	Chios	2,136	4.6%	-44.8%	23	Kithira	541	1.2%	-39.5%
8	Paros	2,058	4.4%	-43.3%	24	Kavala	512	1.1%	-50.5%
9	Mikonos	1,983	4.2%	-60.9%	25	Syros	489	1.0%	-9.8%
10	Kerkyra/Corfu	1,951	4.2%	-42.6%	26	Leros	488	1.0%	-33.7%
11	Naxos	1,914	4.1%	-36.1%	27	Astypalea	454	1.0%	-11.2%
12	Kos	1,830	3.9%	-44.0%	28	Skiros	410	0.9%	-7.2%
13	Alexandroupolis	1,761	3.8%	-35.8%	29	Kalimnos	382	0.8%	-2.6%
14	Samos	1,686	3.6%	-32.8%	30	*Kastoria-Kozani	310	0.7%	-13.4%
15	Milos	1,406	3.0%	-37.3%	31	Sitia	306	0.7%	-33.2%
16	Limnos	1,108	2.4%	-33.5%		Total	46,799	100.0%	-46.6%

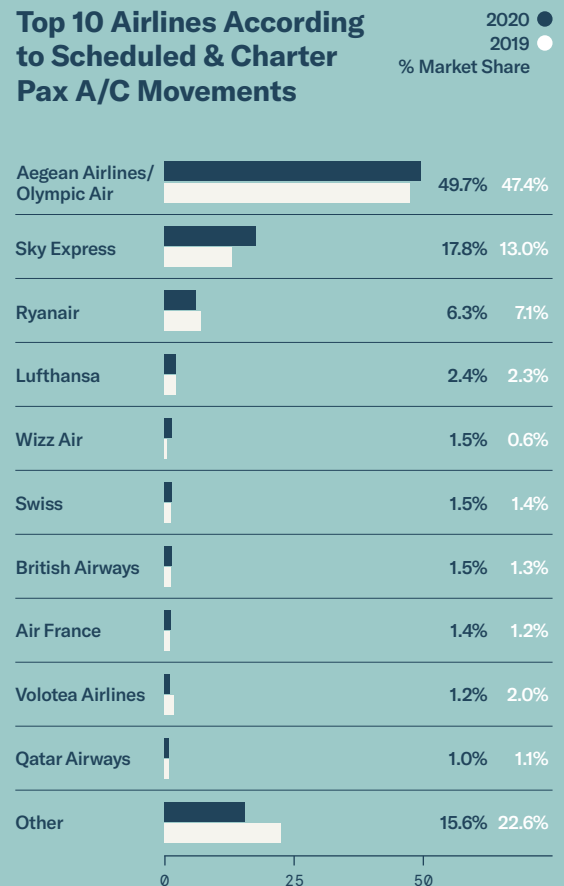
* In the cases of domestic flights with intermediate stop(s), the cities included in the routing are presented together

Ranking of International Destinations according to A/C Movements

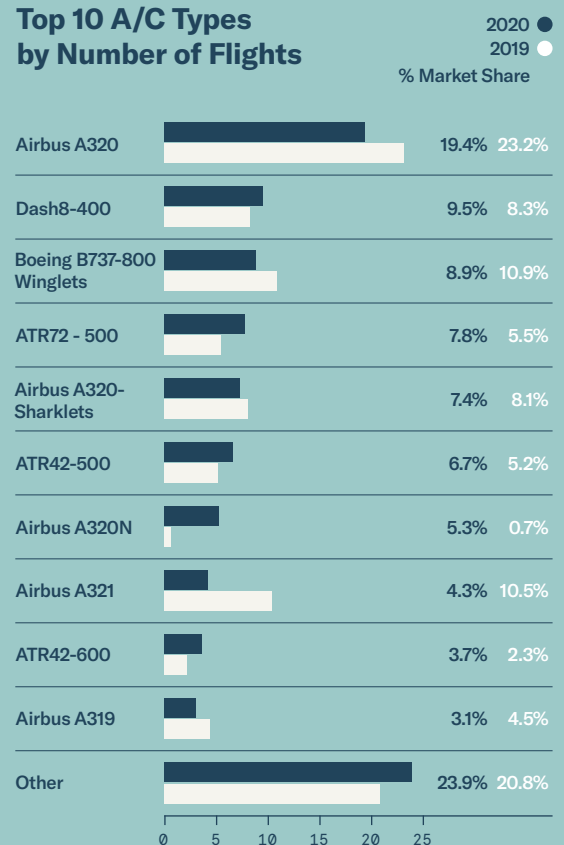
City	Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019	City	Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019
1 London	3,870	8.7%	-54.1%	48 Naples	156	0.3%	-71.4%
2 Larnaca	3,350	7.5%	-50.9%	49 Edinburgh	152	0.3%	-58.5%
3 Paris	2,672	6.0%	-54.5%	50 Nice	151	0.3%	-50.7%
4 Frankfurt	1,964	4.4%	-48.2%	51 Krakow	149	0.3%	-52.2%
5 Rome	1,939	4.3%	-64.4%	52 Luxembourg	148	0.3%	-5.7%
6 Amsterdam	1,786	4.0%	-39.4%	53 New York	145	0.3%	-91.8%
7 Munich	1,737	3.9%	-46.0%	54 Jeddah	136	0.3%	-56.7%
8 Vienna	1,651	3.7%	-23.2%	55 Toulouse	134	0.3%	-42.5%
9 Zurich	1,467	3.3%	-50.0%	56 Katowice	129	0.3%	-67.6%
10 Tel Aviv	1,272	2.8%	-63.6%	57 Catania	118	0.3%	-76.2%
11 Milan	1,267	2.8%	-61.1%	58 Beijing	117	0.3%	-59.7%
12 Brussels	1,226	2.7%	-53.1%	59 Addis Ababa	117	0.3%	631.3%
13 Istanbul	1,192	2.7%	-79.8%	60 Paphos	116	0.3%	383.3%
14 Bucharest	1,140	2.5%	-53.5%	61 Amman	114	0.3%	-85.5%
15 Berlin	1,010	2.3%	-55.9%	62 Bristol	110	0.2%	-51.3%
16 Doha	908	2.0%	-58.4%	63 Basel	99	0.2%	-69.9%
17 Geneva	893	2.0%	-44.9%	64 Zagreb	96	0.2%	-84.3%
18 Madrid	831	1.9%	-62.5%	65 Toronto	92	0.2%	-84.8%
19 Cairo	824	1.8%	-63.9%	66 Marrakesh	89	0.2%	-75.3%
20 Sofia	732	1.6%	-57.0%	67 Helsinki	78	0.2%	-81.7%
21 Dusseldorf	651	1.5%	-38.6%	68 Bordeaux	76	0.2%	-67.1%
22 Barcelona	614	1.4%	-71.7%	69 Riga	76	0.2%	-56.3%
23 Budapest	570	1.3%	-54.8%	70 Dortmund	76	0.2%	-
24 Copenhagen	562	1.3%	-61.0%	71 Montreal	70	0.2%	-87.1%
25 Belgrade	514	1.1%	-64.5%	72 Tbilisi	70	0.2%	-80.2%
26 Warsaw	489	1.1%	-61.3%	73 Izmir	68	0.2%	-82.6%
27 Moscow	480	1.1%	-79.8%	74 Memmingen	66	0.1%	-42.1%
28 Tirana	418	0.9%	-51.1%	75 Montpellier	64	0.1%	-
29 Dubai	408	0.9%	-60.4%	76 Karlsruhe/Baden Baden	60	0.1%	-49.6%
30 Eindhoven	330	0.7%	-53.4%	77 Kutaisi	48	0.1%	-78.9%
31 Abu Dhabi	314	0.7%	-64.4%	78 Nuremberg	48	0.1%	-5.9%
32 Manchester	292	0.7%	-57.1%	79 Singapore	46	0.1%	-86.1%
33 Dublin	286	0.6%	-53.7%	80 Yerevan	44	0.1%	-83.6%
34 Beirut	285	0.6%	-78.8%	81 Aqaba	44	0.1%	-50.0%
35 Bahrain	270	0.6%	-50.4%	82 Hanover	43	0.1%	-60.2%
36 Stockholm	269	0.6%	-69.5%	83 Palermo	42	0.1%	-86.9%
37 Kyiv	263	0.6%	-77.4%	84 Skopje	42	0.1%	-83.1%
38 Hamburg	261	0.6%	-49.9%	85 Bratislava	40	0.1%	-83.6%
39 Stuttgart	252	0.6%	-54.0%	86 Poznan	35	0.1%	-79.4%
40 Prague	249	0.6%	-66.4%	87 Vilnius	34	0.1%	-85.7%
41 Bologna	247	0.6%	-66.8%	88 Wroclaw	34	0.1%	-45.2%
42 Malta	230	0.5%	-57.6%	89 Gdansk	33	0.1%	-72.5%
43 Lyon	194	0.4%	-53.0%	90 Casablanca	32	0.1%	-85.2%
44 Lisbon	188	0.4%	-70.7%	91 Oslo	31	0.1%	-91.2%
45 Marseille	184	0.4%	-56.5%	92 Muscat	26	0.1%	-90.3%
46 Venice	160	0.4%	-77.8%	93 Chisinau	22	0.0%	-81.7%
47 Nantes	159	0.4%	-63.6%	94 Dubrovnik	18	0.0%	-95.1%

City	Scheduled & Charter Pax A/C Movements 2020	Market Share 2020	% 2020 /2019
95 Shijiazhuang	8	0.0%	-
96 Split	7	0.0%	-
97 Varna	6	0.0%	-
98 Cologne	5	0.0%	-
99 Verona	4	0.0%	-
100 Porto	4	0.0%	-
101 St Petersburg (RU)	4	0.0%	-
102 Kaunas	3	0.0%	-
103 Birmingham (GB)	3	0.0%	-
104 Chengdu	3	0.0%	-
105 Ljubljana	3	0.0%	-
106 Odesa	3	0.0%	-
107 Pristina	3	0.0%	-
108 Tabuk	3	0.0%	-
109 Zaporozhye	3	0.0%	-
110 Sarajevo	2	0.0%	-
111 Lille	2	0.0%	-
112 Rovaniemi	2	0.0%	-
113 Kassel	2	0.0%	-
114 Vitoria (ES)	2	0.0%	-
115 East Midlands	2	0.0%	-
116 Baku	2	0.0%	-
117 Braunschweig	2	0.0%	-
118 Erbil	2	0.0%	-
119 Khartoum	2	0.0%	-
120 Klagenfurt	2	0.0%	-
121 Riyadh	1	0.0%	-
122 Valencia (ES)	1	0.0%	-
123 Krasnodar	1	0.0%	-
124 Hurghada	1	0.0%	-
125 Florence (IT)	1	0.0%	-
126 Baghdad	1	0.0%	-
127 Batumi	1	0.0%	-
128 Bergen	1	0.0%	-
129 Bremen	1	0.0%	-
130 Denpasar Bali	1	0.0%	-
131 Islamabad	1	0.0%	-
132 Leeds Bradford	1	0.0%	-
133 Leipzig	1	0.0%	-
134 Manila	1	0.0%	-
135 Mulhouse	1	0.0%	-
136 Mumbai	1	0.0%	-
137 Rotterdam	1	0.0%	-
138 Tehran	1	0.0%	-
139 Uzhgorod	1	0.0%	-
140 Zaragoza	1	0.0%	-
Total	44,709	100.0%	-61.1%

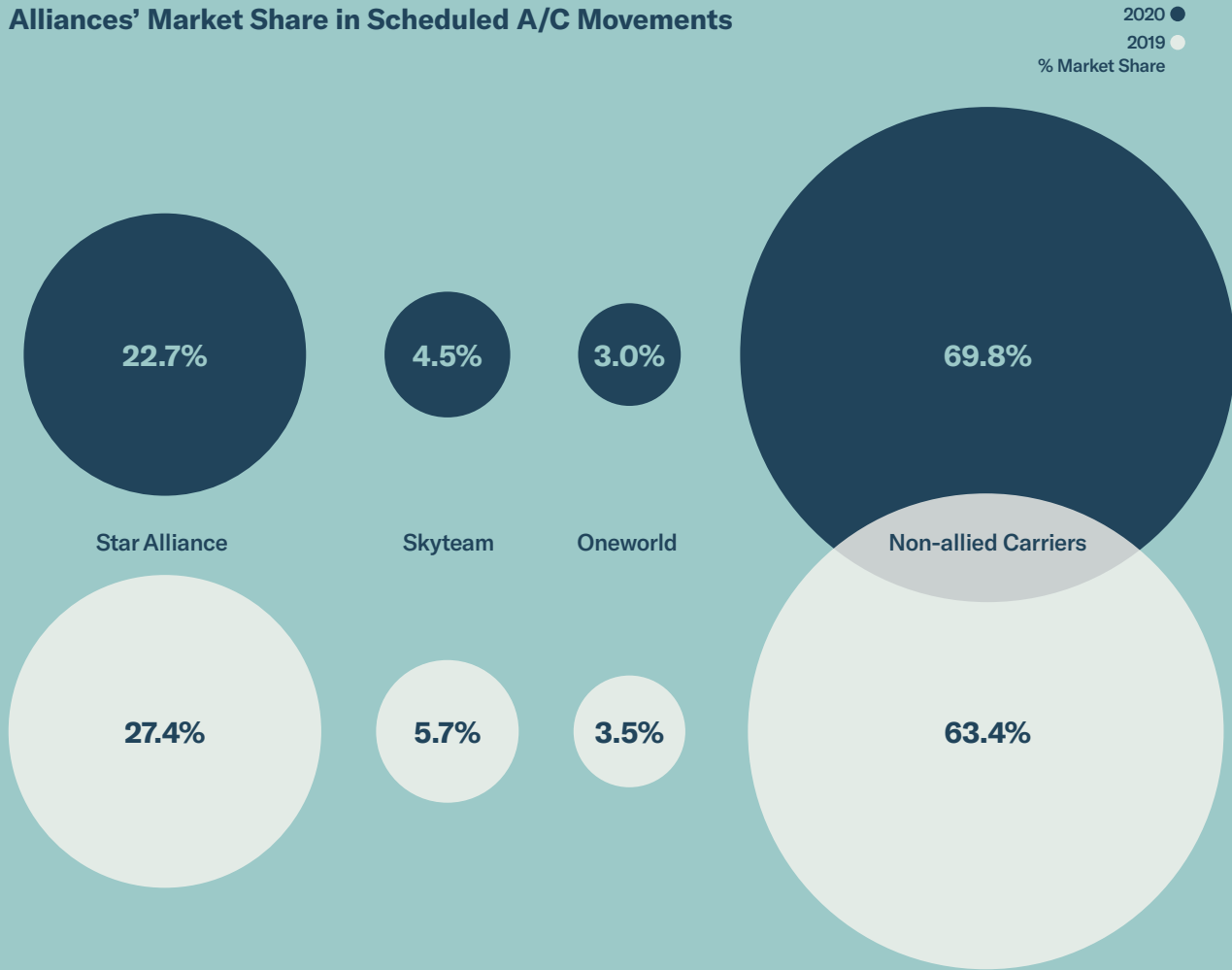
Top 10 Airlines According to Scheduled & Charter Pax A/C Movements



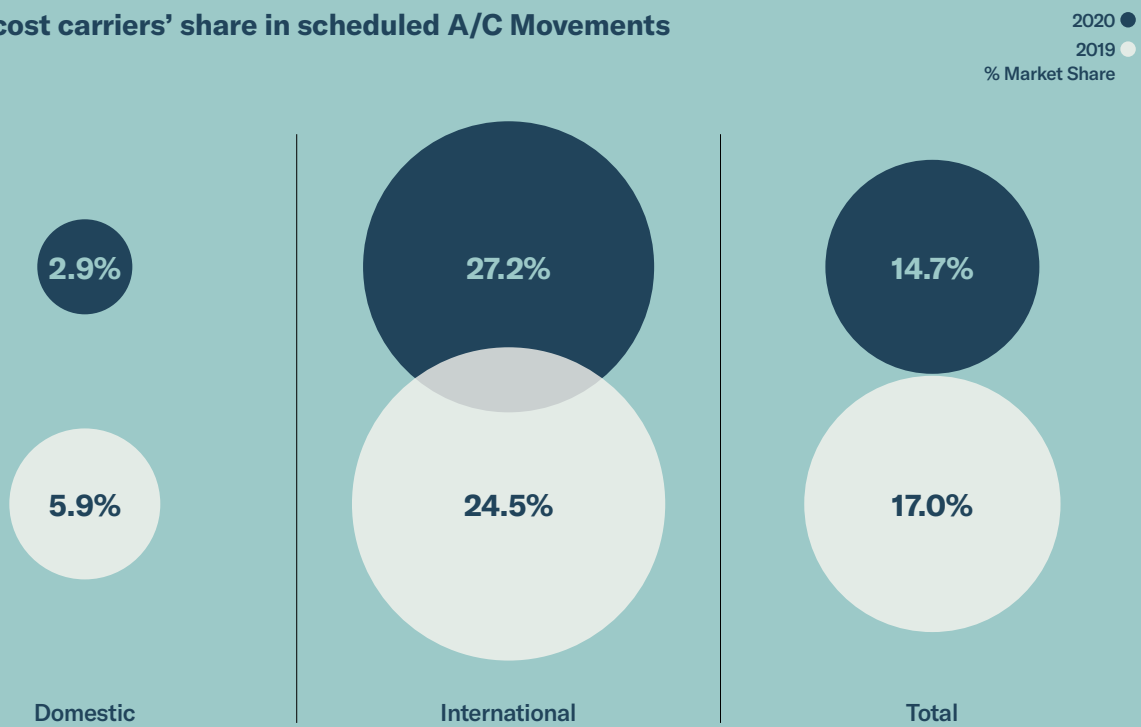
Top 10 A/C Types by Number of Flights



Alliances' Market Share in Scheduled A/C Movements



Low-cost carriers' share in scheduled A/C Movements



Peak and Average Daily A/C Movements

	Ranking	Day	Date	No of Flights
10 Busiest Days	1	Friday	21/08/2020	569
	2	Friday	14/08/2020	566
	3	Sunday	16/08/2020	564
	4	Friday	28/08/2020	560
	5	Sunday	30/08/2020	555
	6	Sunday	09/08/2020	552
	7	Sunday	02/08/2020	551
	8	Monday	17/08/2020	549
	9	Saturday	22/08/2020	548
	10	Friday	31/07/2020	545
30th Busiest Day	30	Friday	10/01/2020	495
Average Day		Tuesday	17/03/2020	310

Average Day = Day with A/C movements traffic closest to the average (112,415/366=307)

Daily A/C Movements Peaks

		Day	Date	No of Flights
Domestic	Arrivals	Sunday	16/08/2020	138
	Departures	Sunday	16/08/2020	138
	Total	Sunday	16/08/2020	276
International	Arrivals	Thursday	02/01/2020	172
	Departures	Thursday	02/01/2020	174
	Total	Thursday	02/01/2020	346
Total	Arrivals	Friday	14/08/2020	288
	Departures	Sunday	16/08/2020	284
	Total	Friday	21/08/2020	569

Monthly Distribution of MTOW by Flight Type (in tonnes)

Month	Scheduled pax	Charter Pax	Scheduled Cargo	Charter Cargo	Commercial	Non-Commercial	Grand Total
					Other		
January	853,154	2,956	32,481	130	15,227	28,483	932,431
February	773,887	1,398	30,188	0	14,363	16,893	836,729
March	523,009	2,825	31,568	1,526	15,710	15,359	589,996
April	63,375	1,970	37,041	8,130	15,552	9,832	135,899
May	90,004	4,457	44,045	6,441	13,108	6,955	165,010
June	243,049	2,193	48,219	875	13,569	12,895	320,800
July	605,946	2,669	48,105	946	27,686	28,207	713,560
August	798,964	1,956	41,710	129	25,028	17,172	884,960
September	615,667	4,168	40,968	1,257	20,387	23,360	705,807
October	490,506	5,631	39,120	2,214	20,222	20,367	578,060
November	260,081	3,862	43,197	1,463	11,309	18,806	338,718
December	251,364	2,741	47,071	958	11,881	13,911	327,926
Year Total	5,569,004	36,827	483,715	24,069	204,042	212,240	6,529,895

4 Tonnes Up in the Sky

Cargo uplift reached 75,783 tonnes in 2020, declining by 19.4% compared to 2019

According to IATA's market analysis report for 2020, global air freight traffic fell by 10.6% versus 2019, marking the largest annual drop since IATA started monitoring cargo performance in 1990. The main challenge was the capacity crunch due to the reduced operation of passenger aircraft following travel restrictions internationally. This decline led to record-high load factors, yields and revenues for the airlines' cargo sector. Furthermore, underutilised passenger aircraft were used solely to transport freight, the so-called "preighter", to cover market needs.

At AIA, cargo reached 75,783 tonnes declining by 19.4% compared to 2019. Freight, which accounts for 95% of the total uplift (mail comprises the rest 5%), declined by 17.1%, in line with Europe's average performance of -16%. Segmentation of international freight into passenger- and cargo-aircraft transported volumes reflected the lack of cargo capacity. Specifically, volumes lifted by both passenger aircraft and preighters dropped by 40.7% for inbound and 44.3% for outbound flows, while cargo aircraft volumes increased by 11.8% and 25.7%, respectively.

Further market developments are worth mentioning:

- Excluding 637 tonnes of Covid-19-related material flown on dedicated freighters, international inbound freight decreased by 13.1%
- International outbound freight was highly affected by the limited capacity and the resulting high prices, and dropped by 21.8%. It did however maintain a higher market share (51.7%) than the inbound segment
- Domestic freight experienced a 14.2% decrease,

referring mainly to inbound traffic

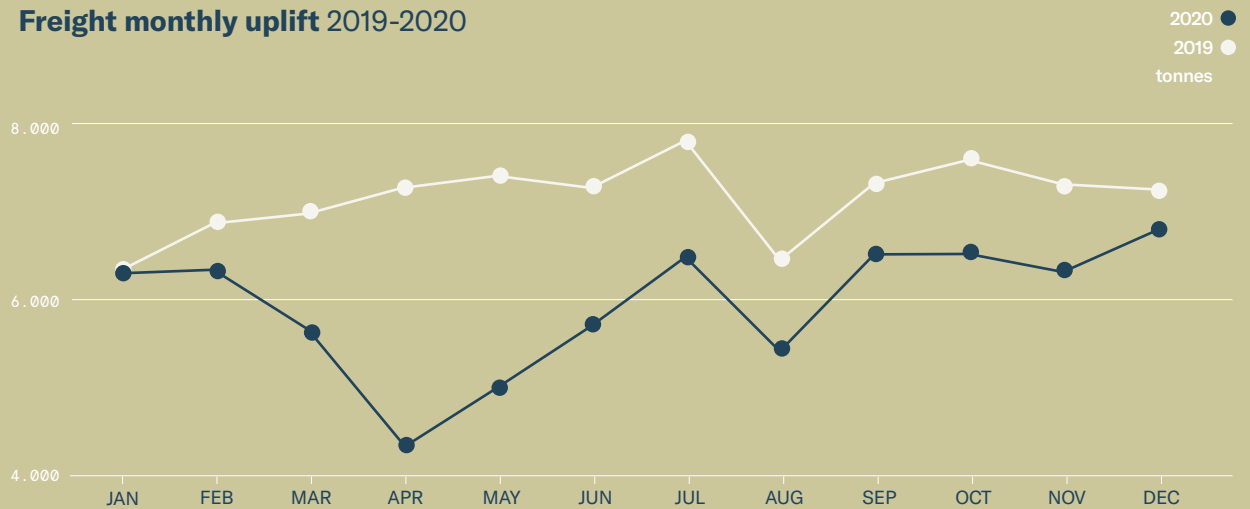
- The lack of passenger flights heavily influenced mail traffic. As a result, airlifted volumes plunged by 45.4%. To cope with the limited air capacity, Hellenic Post, together with other European postal authorities, operated scheduled road freight services
- Turkish Airlines was the main preighter operator with a total of 234 flights. British Airways, Egyptair and Qatar Airways were also among the frequent preighter operators
- Further to the flown freight, road feeder services were operated either on a scheduled (DHL and FedEx/TNT) or ad hoc basis. In addition, Lufthansa Cargo utilized trucks to compensate for the reduced air capacity needed for the outbound freight
- Ten airlines carried almost 88% of international freight traffic: DHL, UPS, FedEx/TNT, Qatar Airways, Emirates, Turkish Airlines, Aegean Airlines, British Airways, Olympic Air and Lufthansa
- The integrators' (DHL, Fedex/TNT and UPS) market share on the international flown freight jumped to 55.7% in 2020 compared to 36.9% in 2019
- Four airlines shared domestic traffic volumes: Olympic Air, DHL, Sky Express and Swiftair Hellas, the latter operating on behalf of the three integrators

2021 traffic prospects look positive. However, whether the Greek market will follow the global upward trend of the first months of 2021 when volumes returned to pre-pandemic levels, still remains to be seen.

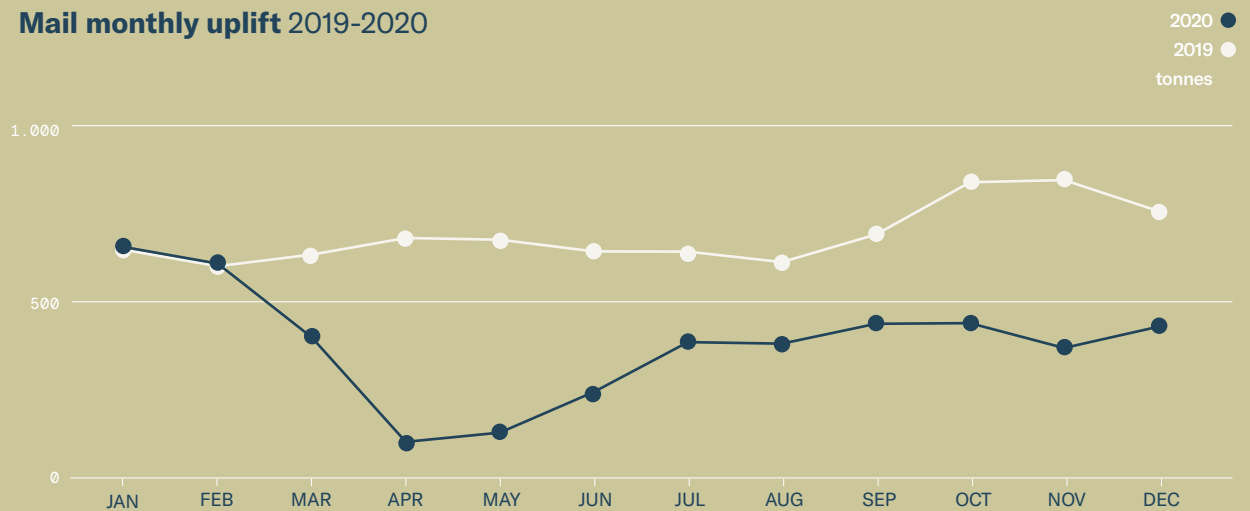
Monthly Cargo Uplift (tonnes)

Month	Freight	%2020/2019	Mail	%2020/2019	Total Cargo	%2020/2019
January	6,290.3	-0.5%	648.5	1.0%	6,938.8	-0.4%
February	6,331.5	-7.7%	601.0	0.9%	6,932.5	-7.1%
March	5,656.1	-18.9%	390.6	-37.9%	6,046.7	-20.5%
April	4,358.6	-40.0%	92.5	-86.3%	4,451.0	-43.9%
May	4,989.9	-32.6%	118.8	-82.3%	5,108.7	-36.7%
June	5,691.6	-21.7%	234.9	-63.2%	5,926.4	-25.0%
July	6,476.1	-17.0%	377.0	-40.8%	6,853.1	-18.8%
August	5,407.4	-16.1%	372.6	-38.7%	5,779.9	-18.1%
September	6,505.9	-11.1%	429.3	-37.4%	6,935.2	-13.4%
October	6,510.6	-14.1%	431.1	-48.3%	6,941.6	-17.5%
November	6,306.1	-13.7%	360.3	-57.1%	6,666.4	-18.2%
December	6,782.1	-6.4%	420.8	-44.1%	7,202.9	-10.0%
Total	71,306.1	-16.9%	4,477.2	-45.4%	75,783.4	-19.4%

Freight monthly uplift 2019-2020

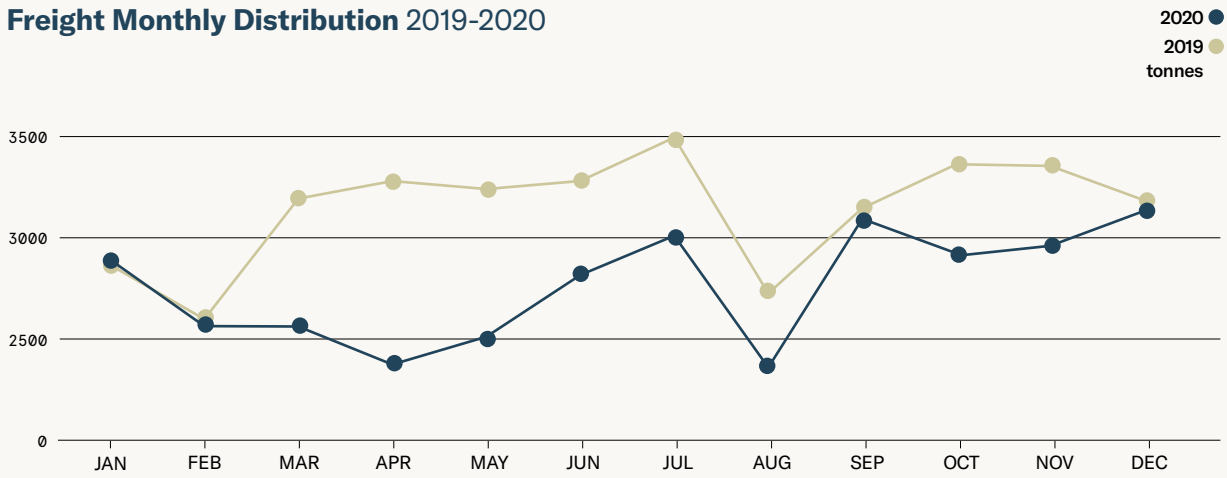


Mail monthly uplift 2019-2020

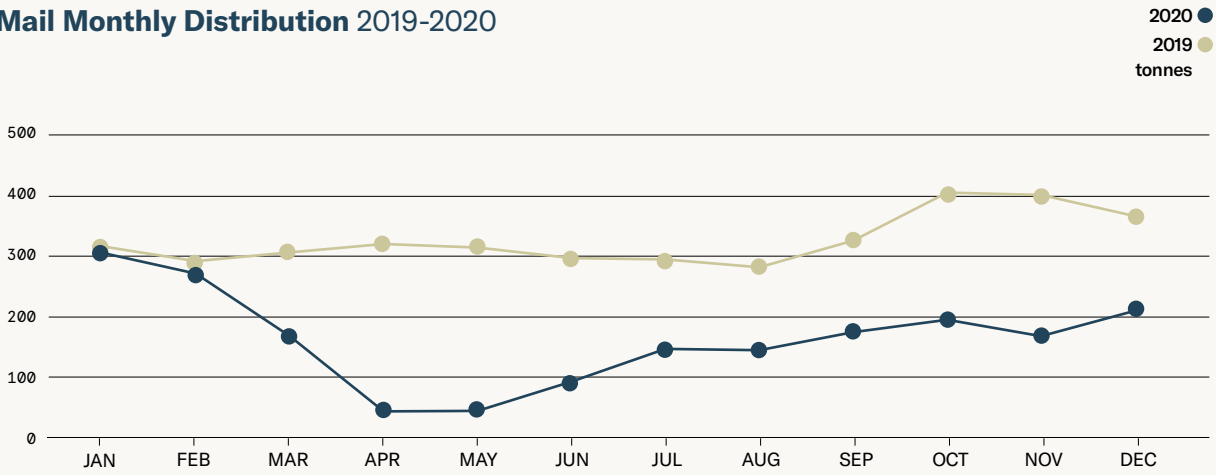


Inbound

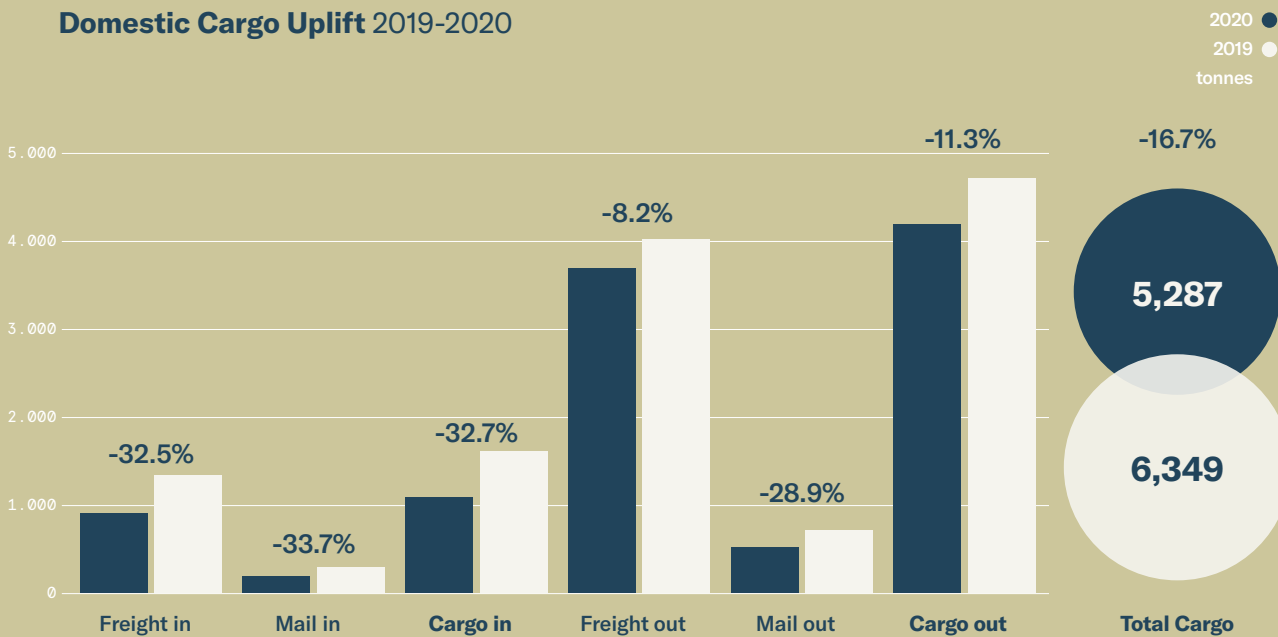
Freight Monthly Distribution 2019-2020



Mail Monthly Distribution 2019-2020

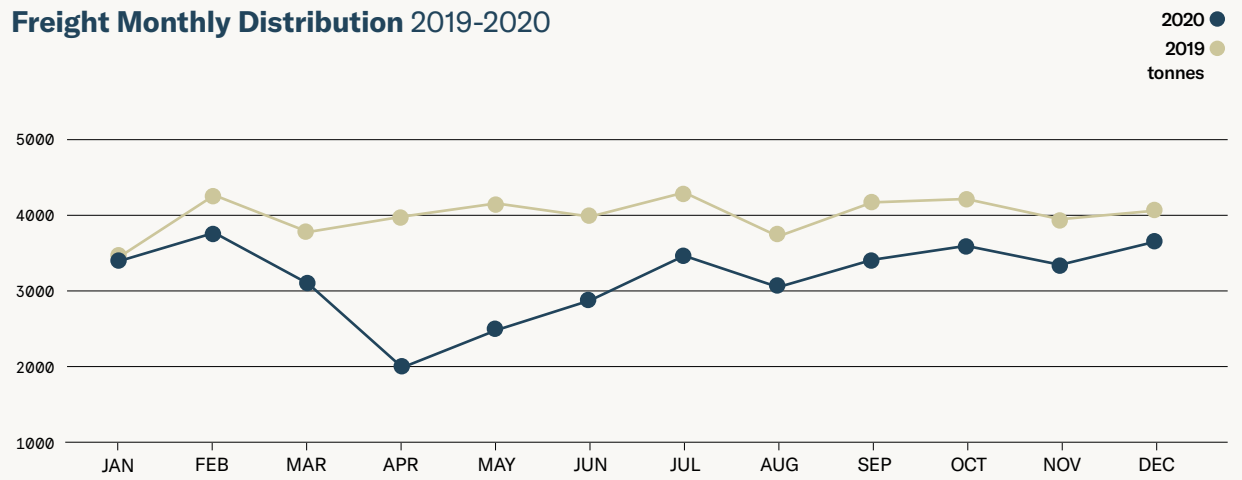


Domestic Cargo Uplift 2019-2020

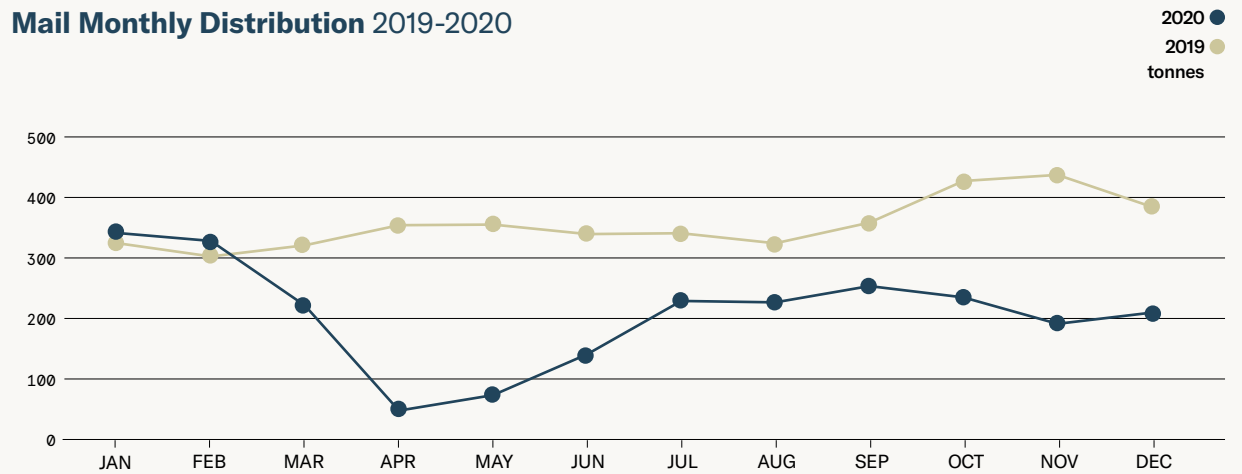


Outbound

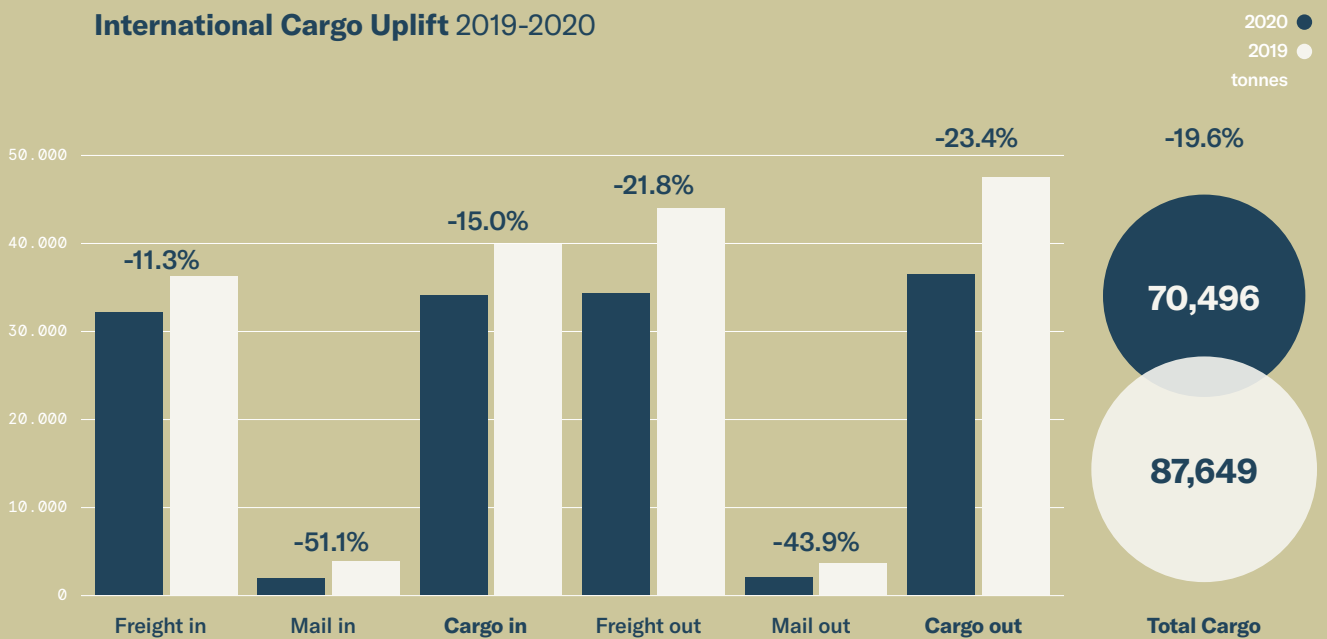
Freight Monthly Distribution 2019-2020



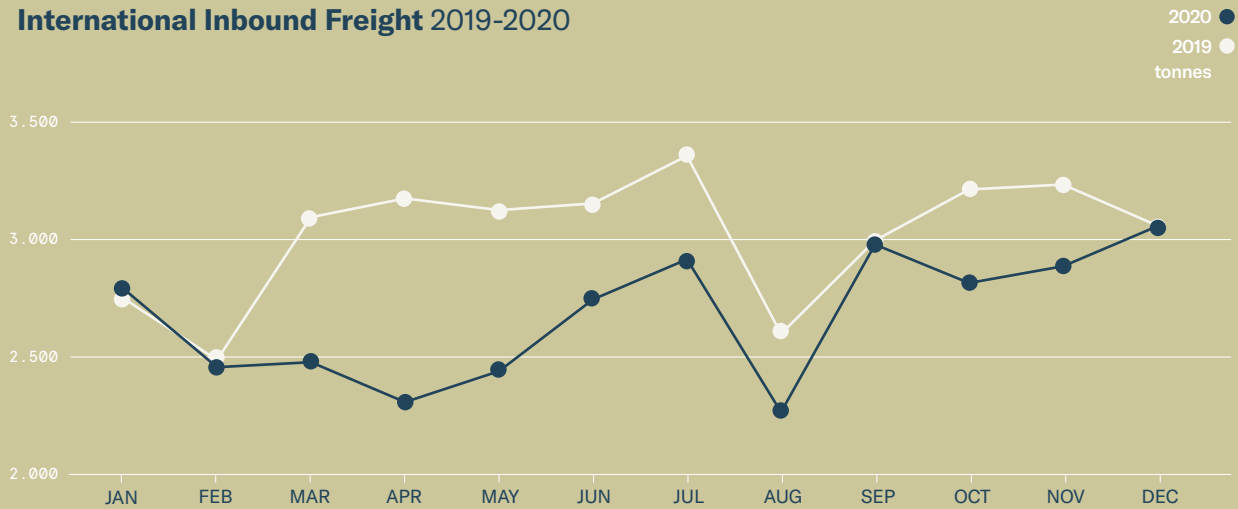
Mail Monthly Distribution 2019-2020



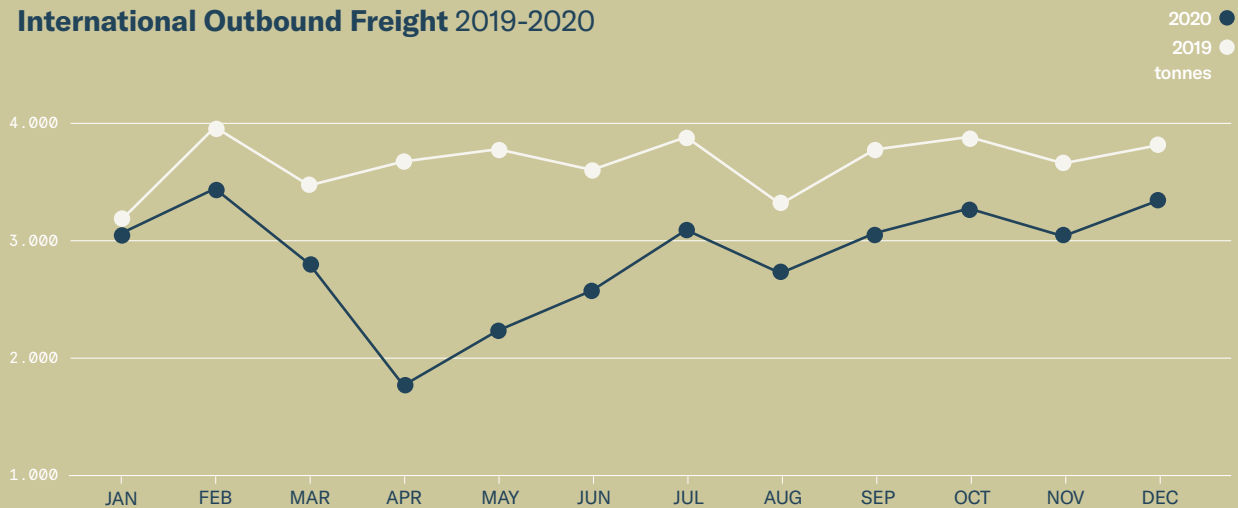
International Cargo Uplift 2019-2020



International Inbound Freight 2019-2020

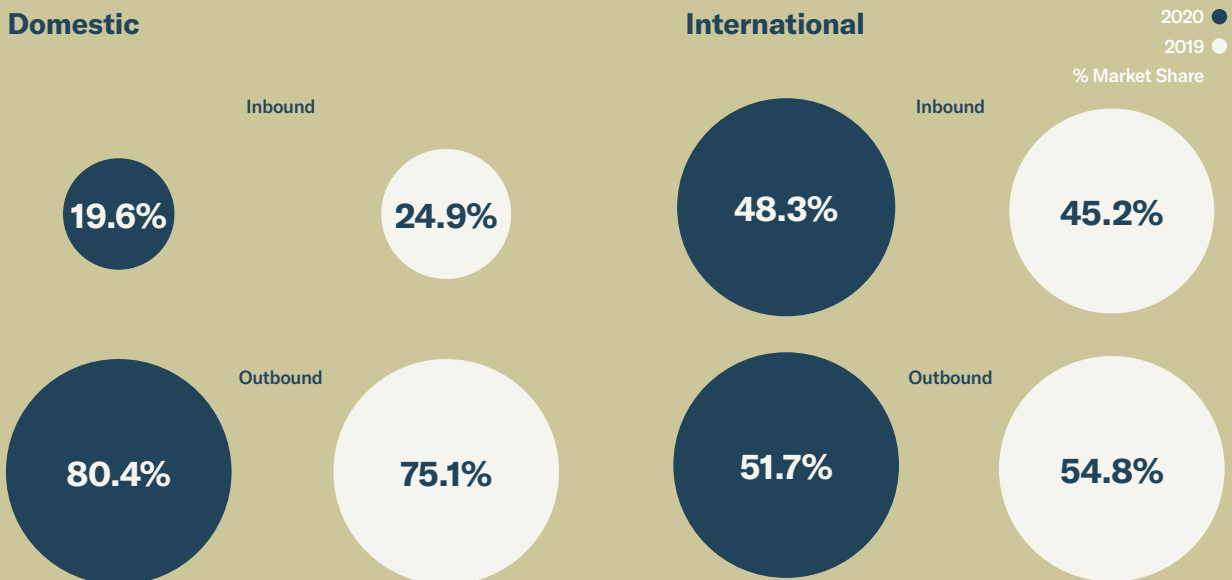


International Outbound Freight 2019-2020

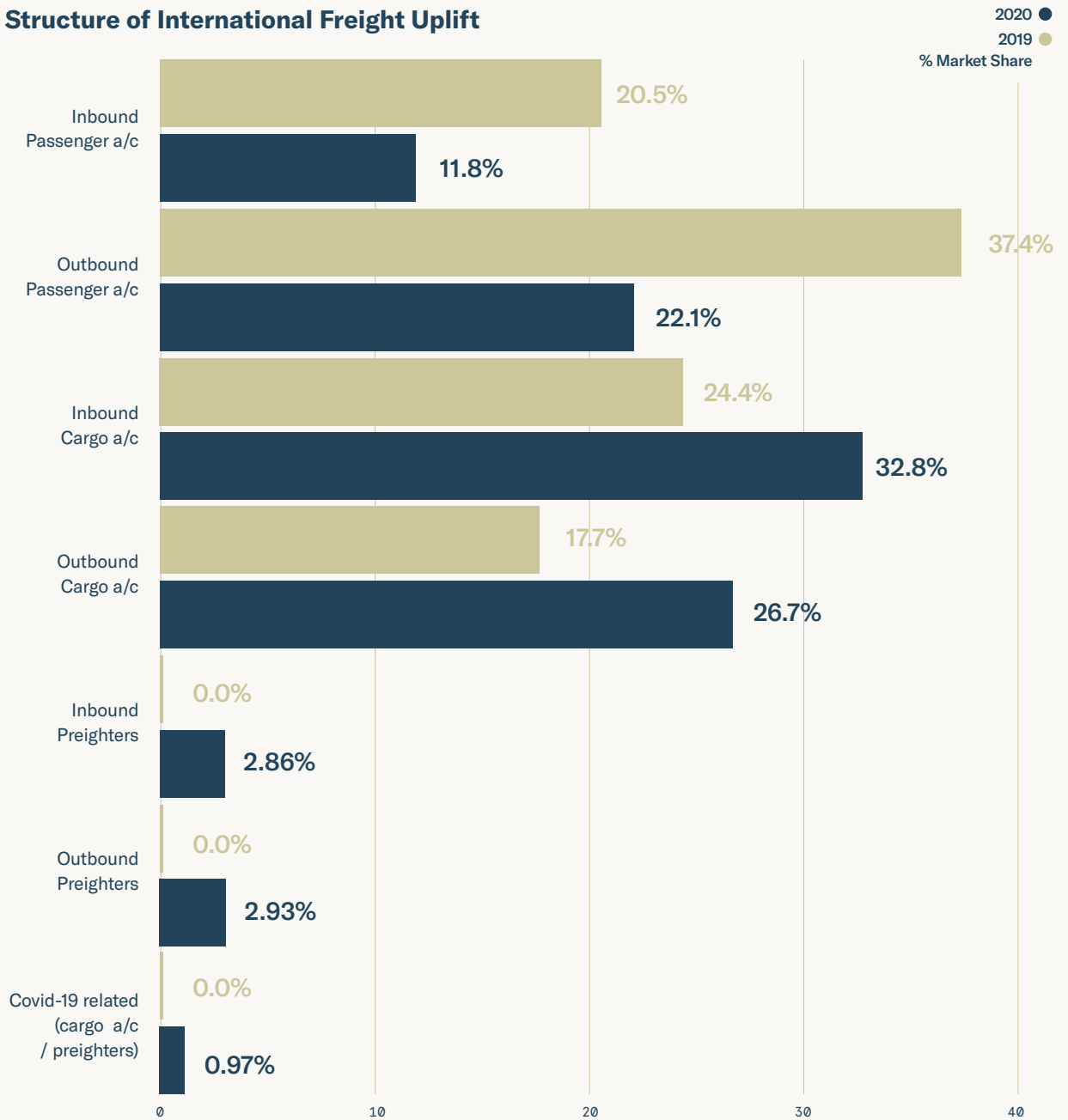


Freight Uplift

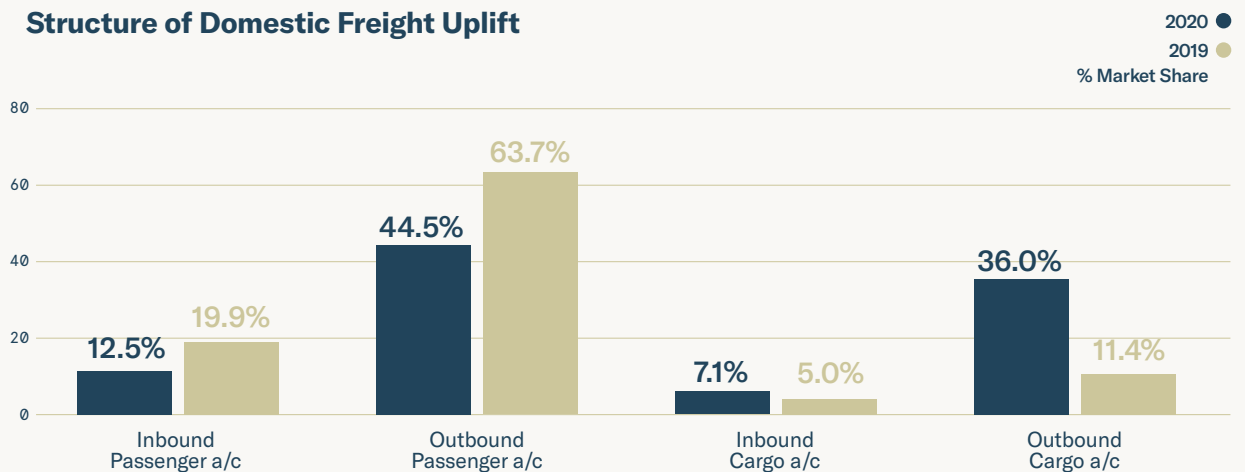
Domestic



Structure of International Freight Uplift

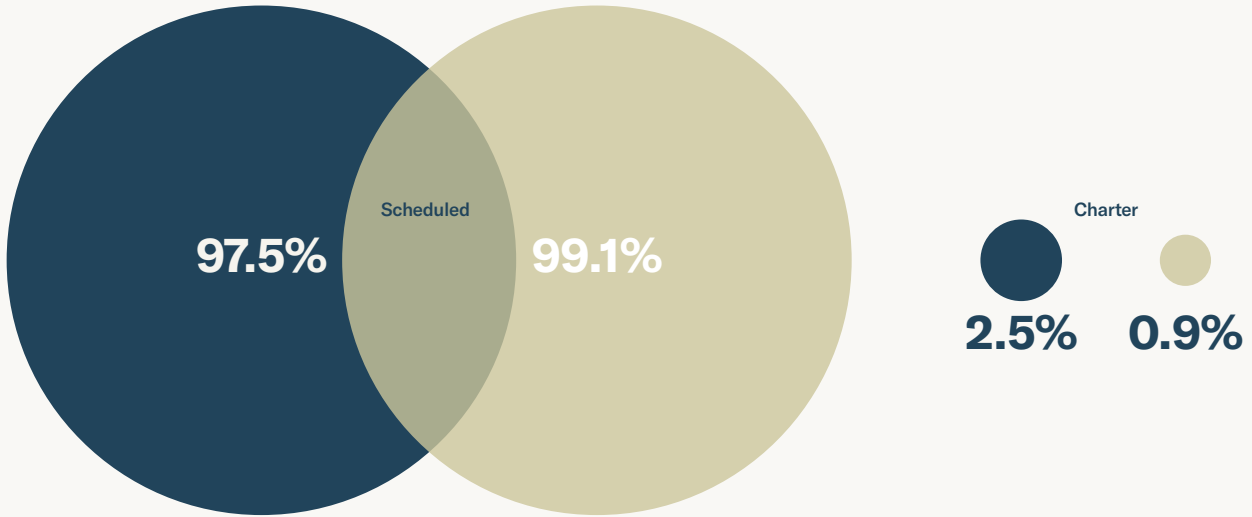


Structure of Domestic Freight Uplift

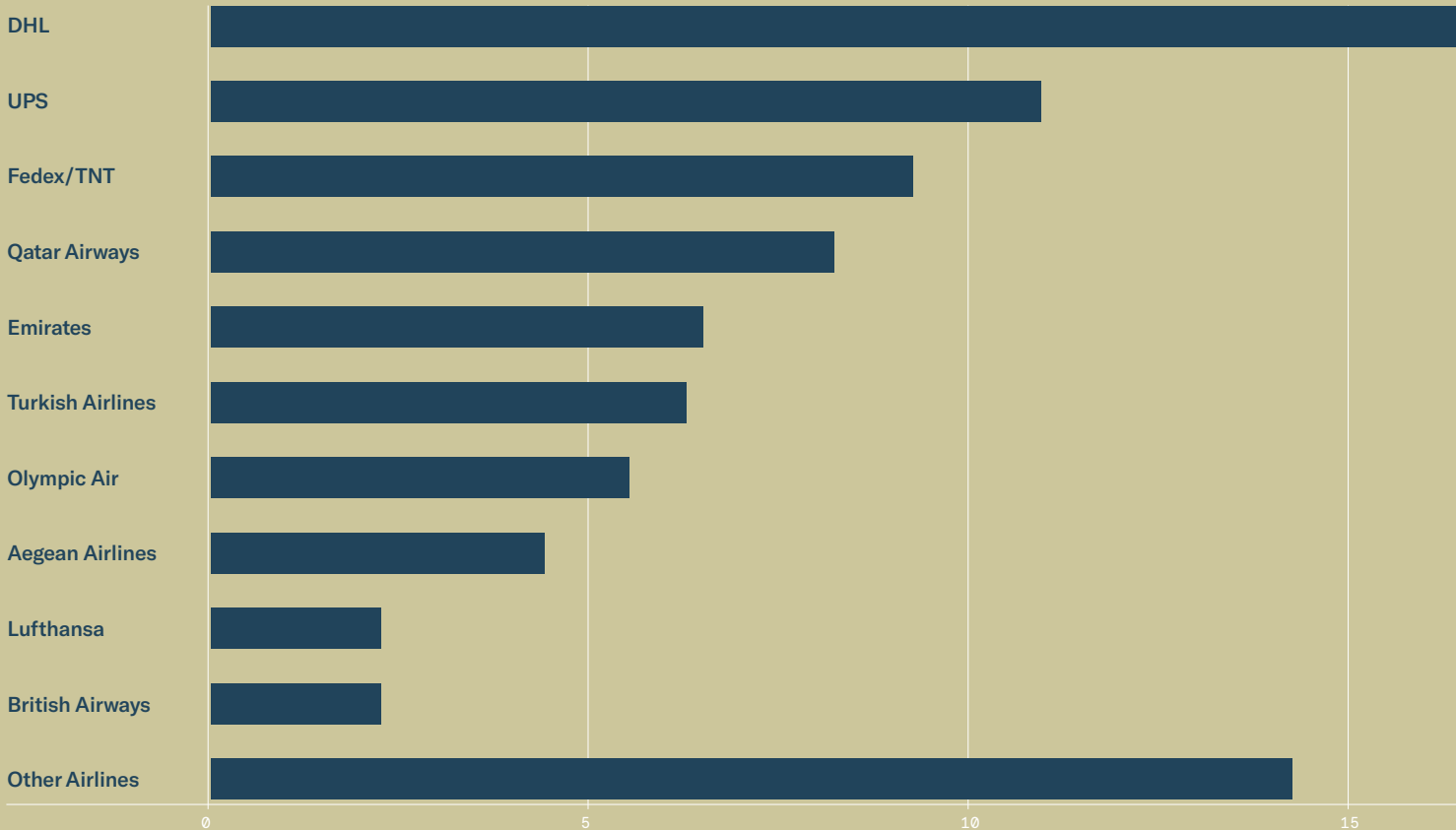


Scheduled vs. Charter Cargo Uplift

2020 ●
2019 ●
% Market Share

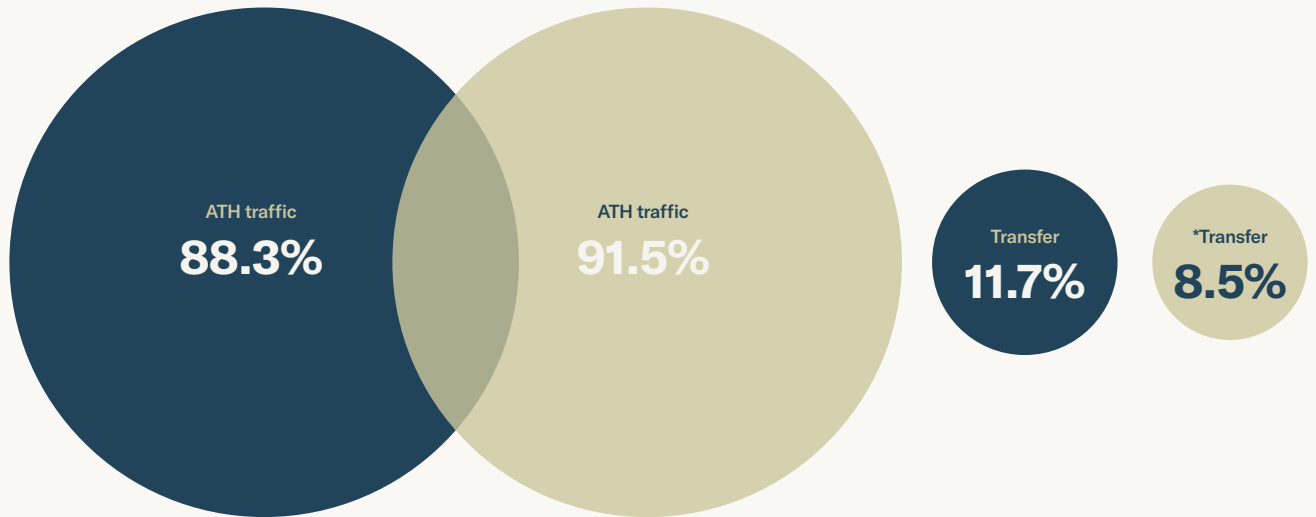


Cargo Uplift - Top 10 Airlines



Total Freight ATH traffic vs. Transfer

2020 ●
2019 ●
% Market Share



* 2019 volumes adjusted for DHL traffic

2020 ●
2019 ●
% Market Share

20

25

30

35

5 The Network Worksheet

In 2020, Athens was directly connected with scheduled services to 126 destinations-cities in 51 countries, operated by a total of 59 carriers

In a year dramatically impacted by the Covid-19 pandemic, Athens was directly connected with scheduled services to 126 destinations-cities (157 in 2019), in 51 countries (55 in 2019), operated by a total of 59 carriers (66 in 2019).

During 2020, WizzAir introduced services to Dortmund, a new destination for Athens International Airport, which was never served previously. WizzAir operated one weekly frequency in the summer and the route continued year-round, making Dortmund the 14th route operated by the airline from Athens in 2020. Dortmund was the 12th city destination in Germany, thus enhancing connectivity to one of the key international markets for Athens,

Athens' resilience in the French market was further demonstrated when Transavia France introduced Montpellier, a new international destination that was never served before from Athens. From the 4th of July 2020, Transavia France introduced two weekly summer seasonal frequencies, making this the 4th route operated by the airline and the 9th for the French market.

Another significant development for 2020 was LOT airlines' return to the Athens market, after a three-year absence. LOT introduced four weekly summer seasonal frequencies, with the first flight operated on the 3rd of July 2020. In 2020, Athens International Airport was connected to six city destinations in Poland served by four airlines.

The pandemic also heavily affected the Airport's strategic marketing actions and activities. As airlines' decisions on future route planning and development became subject to governmental restrictions and approvals, there was no room for remedial steps or growth discussions. Temporary measures were implemented to offer cost mitigation to operating airlines during the lockdown periods:

- March to June 2020: a 100% discount on aircraft parking for grounded aircraft (>48hrs/home-based carriers) and a 50% discount on parking charges for all other aircraft
- 25th October 2020 onwards: a 50% discount on aircraft parking for grounded aircraft (>24hrs/home-based carriers) and a 20% discount on parking charges for all other aircraft.

Considering the absolute disruption of the aviation and tourism industries, the Airport Company adjusted its existing incentives' policy by waiving part of the conditionalities for discounts' eligibility to immediately respond to the prevailing market conditions and offer - to the extent possible - support to the airlines that maintained operations during the adverse period of travel restrictions. As always, AIA's incentives continued to be applied in a fully transparent and non-discriminatory manner.

1

New Airlines
in 2020

2

New Destinations
in 2020

2020

New Airlines 2020

LOT Polish Airlines

New Destinations 2020

Dortmund

Montpellier



59 Airlines Operating Scheduled Passenger Flights

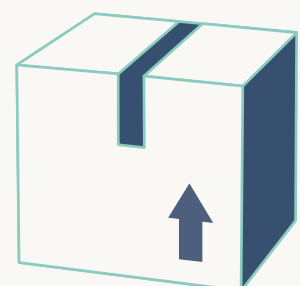
Aegean Airlines	Alitalia	easyjet Europe	Iberia	Qatar Airways	Transavia Airlines
Aer Lingus	Arkia Israeli Airlines	easyjet Switzerland	Israir	Royal Air Maroc	Transavia France
Aeroflot	Austrian Airlines	Egypt Air	KLM	Royal Jordanian	TUI FLY Belgium
Air Baltic	Blue Air	El Al Israel Airlines	Laudamotion	Ryanair	Turkish Airlines
Air Canada	British Airways	Ellinair	LOT Polish Airlines	Saudi Arabian Airlines	Ukraine Intl Airlines
Air China	Brussels Airlines	Emirates	Lufthansa	Scandinavian Airlines	Volotea Airlines
Air Europa	Bulgaria Air	Ethiopian Airlines	MEA	Scoot	Vueling Airlines
Air France	Croatia Airlines	Etihad	Olympic Air	Sky Express	Wizzair
Air Serbia	Cyprus Airways	Eurowings	Oman Air	Swiss Intl Air Lines	Wizzair UK
Air Transat	easyjet	Gulf Air	Pegasus Airlines	Tarom Romania	

35 Airlines Operating Charter Passenger Flights

2Excel Aviation	Fly One Moldova	Skyup Airlines
Air Horizon	Freebird Airlines	Smartwings Hungary
Air Malta	Georgian Airways	Sundair
Air Mediterranean	Jet2.Com Ltd	Tailwind Havayollari
Air Nostrum	Jota Aviation	Titan Airways
Air Srpska	Klass Jet Uab	Trade Air
Azerbaijan Airlines	Motor Sich Airlines	Travel Service Airlines - Smartwings
Biman Bangladesh Airlines	Myway Airlines	TUI Fly
Bluebird Airways	Privilege Style	Ukraine Mediterranean Airlines
Corendon Airlines	Regional Jet Airlines	Wamos Air
Dano Oro Transportas	Rus Line	WDL Aviation
Flynas	Skygreece	

5 Airlines Operating Scheduled Cargo Flights

Airline	Country
DHL Aviation	Germany
FedEx Express	Belgium
Star Air (on behalf of UPS)	USA
Swiftair Hellas	Greece
TNT Airways	Belgium



32 Domestic Scheduled Destinations

Alexandroupolis	Heraklion	Karpathos	Kerkyra/Corfu	Leros	Mitilini	Samos	Syros
Astypalea	Ikaria	Kastoria	Kithira	Limnos	Naxos	Sitia	Thessaloniki
Chania	Ioannina	Kavala	Kos	Mikonos	Paros	Skiathos	Thira/Santorini
Chios	Kalimnos	Kefallonia	Kozani	Milos	Rhodes	Skiros	Zakinthos

85 International Charter Destinations

Abu Dhabi	Berlin	Dubai	Khartoum	London	Munich	Sarajevo	Vienna
Addis Ababa	Birmingham	East Midlands	Klagenfurt	Luxembourg	Nice	Split	Vilnius
Amman	Braunschweig	Florence	Krakow	Lyon	Odesa	Stockholm	Vitoria
Baghdad	Bremen	Frankfurt	Krasnodar	Madrid	Oslo	St Petersburg	Warsaw
Baku	Brussels	Hamburg	Kutaisi	Malta	Paris	Tabuk	Zagreb
Barcelona	Budapest	Hanover	Kyiv	Manchester	Porto	Tbilisi	Zaporozhye
Basel	Cairo	Islamabad	Larnaca	Manila	Prague	Tehran	Zaragoza
Batumi	Catania	Istanbul	Leeds Bradford	Marseille	Pristina	Tel Aviv	Zurich
Beirut	Chisinau	Jeddah	Leipzig	Milan	Riyadh	Tirana	
Belgrade	Cologne	Kassel	Lille	Moscow	Rome	Uzhgorod	
Bergen	Denpasar Bali	Kaunas	Ljubljana	Mulhouse	Rovaniemi	Valencia	

32

Domestic
Scheduled
Destinations

Domestic &
International
Scheduled
Destinations



94 International Scheduled Destinations

Abu Dhabi	Cairo	Istanbul	Milan	Singapore
Addis Ababa	Casablanca	Izmir	Montpellier	Skopje
Amman	Catania	Jeddah	Montreal	Sofia
Amsterdam	Chisinau	Karlsruhe/Baden Baden	Moscow	Stockholm
Aqaba	Copenhagen	Katowice	Munich	Stuttgart
Bahrain	Doha	Krakow	Muscat	Tbilisi
Barcelona	Dortmund	Kutaisi	Nantes	Tel Aviv
Basel	Dubai	Kyiv	Naples	Tirana
Beijing	Dublin	Larnaca	New York	Toronto
Beirut	Dubrovnik	Lisbon	Nice	Toulouse
Belgrade	Dusseldorf	London	Nuremberg	Venice
Berlin	Edinburgh	Luxembourg	Oslo	Vienna
Bologna	Eindhoven	Lyon	Palermo	Vilnius
Bordeaux	Frankfurt	Madrid	Paphos	Warsaw
Bratislava	Gdansk	Malta	Paris	Wroclaw
Bristol	Geneva	Manchester	Poznan	Yerevan
Brussels	Hamburg	Marrakesh	Prague	Zagreb
Bucharest	Hanover	Marseille	Riga	Zurich
Budapest	Helsinki	Memmingen	Rome	



6 Exercises on Punctuality

In 2020, delays of more than 15 minutes affected 10.6% of all departing flights

In 2020, delays of more than 15 minutes affected 10.6% of all departing flights compared to 30.9% in 2019. Delayed domestic scheduled passenger services decreased from 30% in 2019 to 7.2% in 2020, while delayed European and Intercontinental departures stood at approximately 12%. The average delay time of departing flights was 39 minutes, while in 2019 the respective time was 42 minutes. In 2020, the average delay time of domestic scheduled passenger services was 36 minutes, 38 and 39 minutes for European and Intercontinental scheduled services respectively, while the respective delays for 2019 were 46, 38 and 39 minutes.

October was the month with the highest number

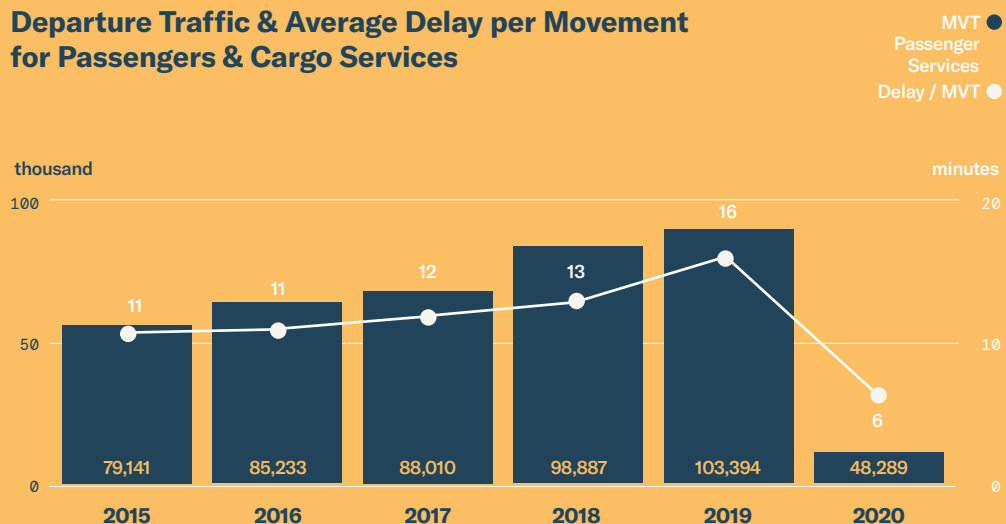
of delayed departing flights, amounting to 13.1%, followed by July with 12.9%; the average delay times were 41 minutes in October and 35.1 in July.

Reactionary reasons affected 31.51% of the delayed departures. Other reasons of delayed departures in 2020 included:

- “Immigration Customs, Health” affecting 5.42%, and
- “Technical and Aircraft Equipment” affecting 3.92% of delayed departures, while only 1.74% were attributed to “Airport Facilities”.

The average delay per movement in 2020 was 6 mm:ss.

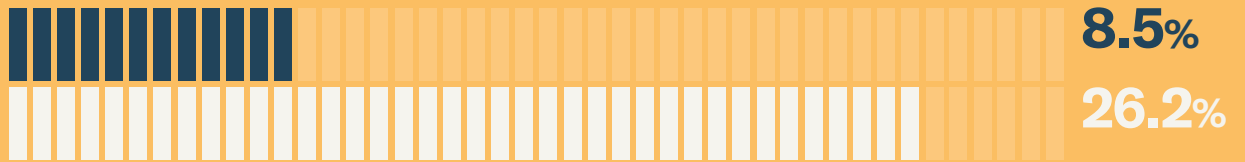
Departure Traffic & Average Delay per Movement for Passengers & Cargo Services



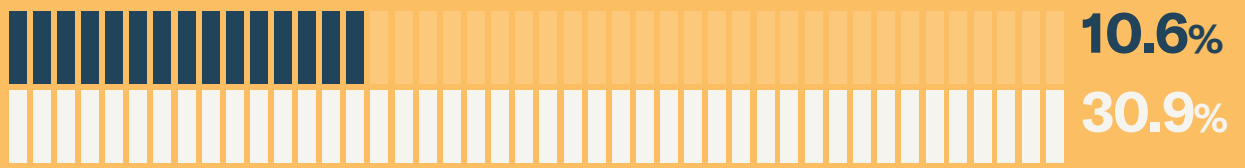
Proportion of Delayed Flights 2019 - 2020

2020 ●
2019 ●
more than 15 min

Arrivals



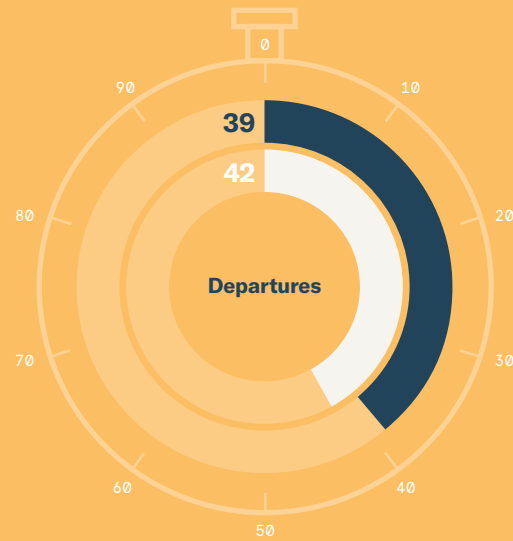
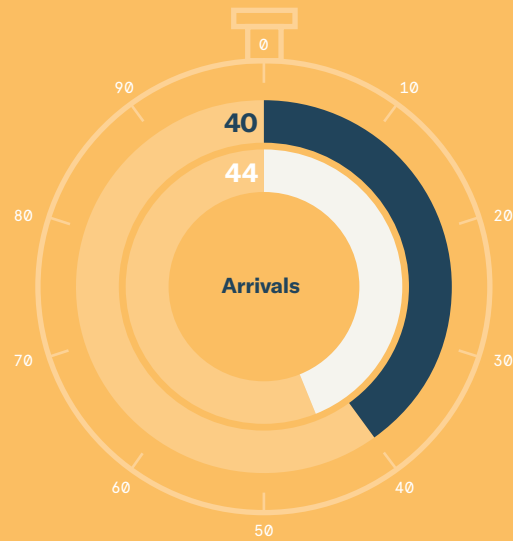
Departures



0 5 10 15 20 25 30

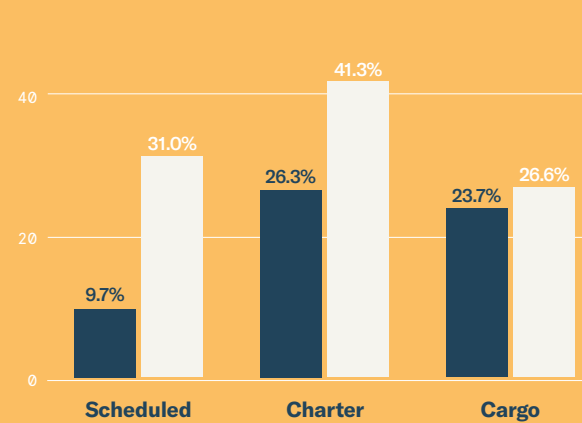
Average Delay per Delayed Flight 2019 - 2020

2020 ●
2019 ●
minutes



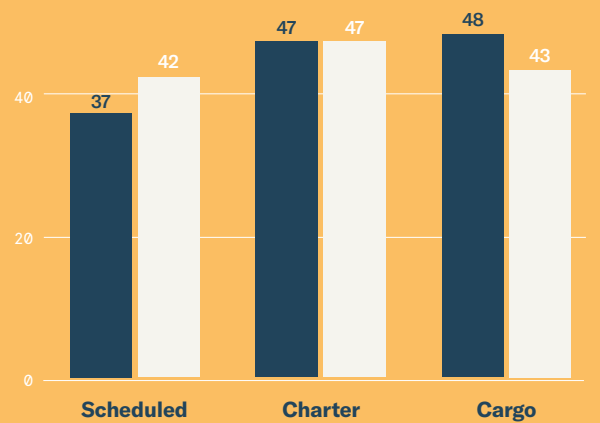
Proportion of Delayed Departures 2019 - 2020

2020 ●
2019 ●
more than 15 min



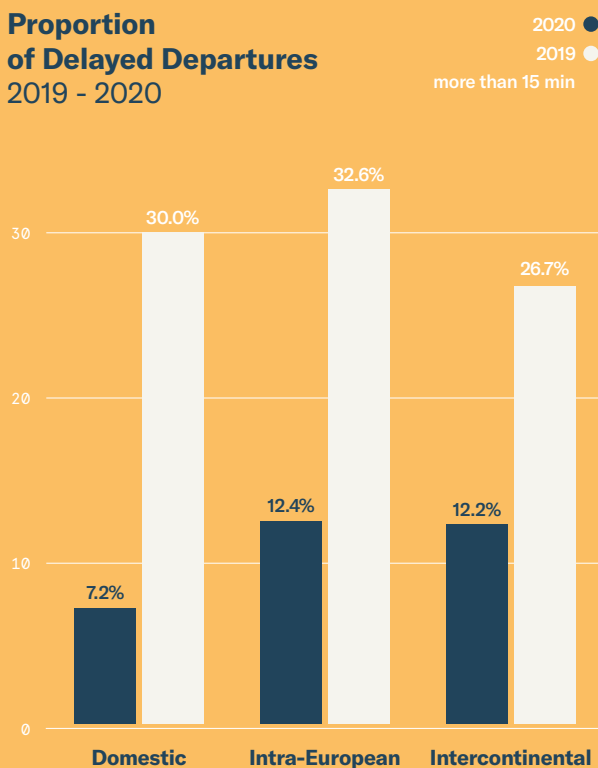
Average Delay per Delayed Departure 2019 - 2020

2020 ●
2019 ●
minutes

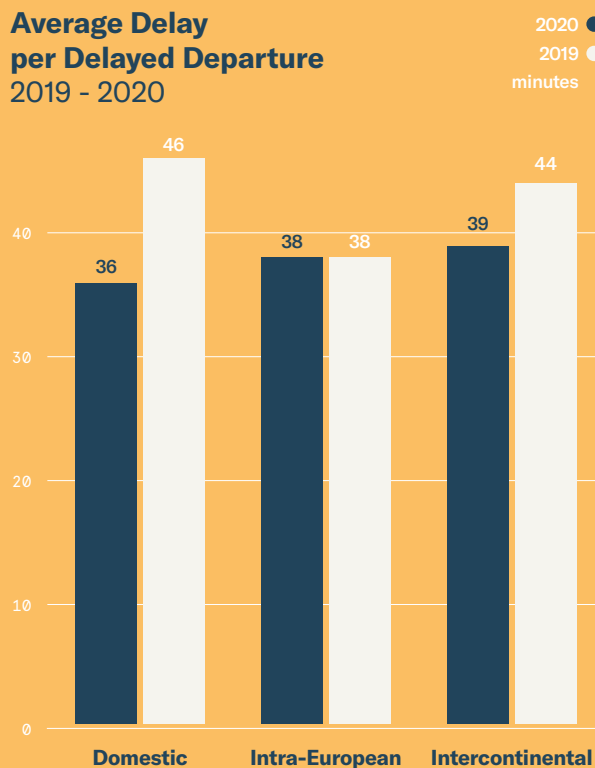


Departing Scheduled Flights

Proportion of Delayed Departures 2019 - 2020



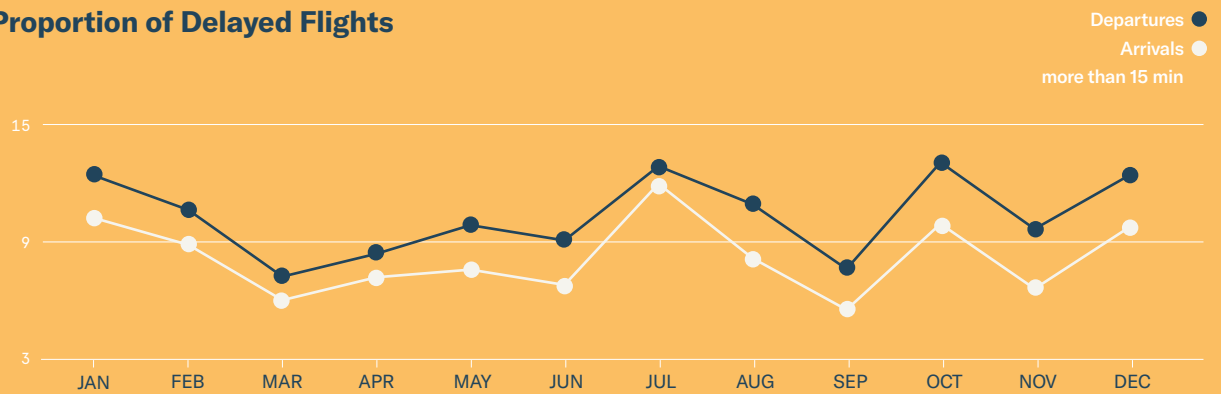
Average Delay per Delayed Departure 2019 - 2020



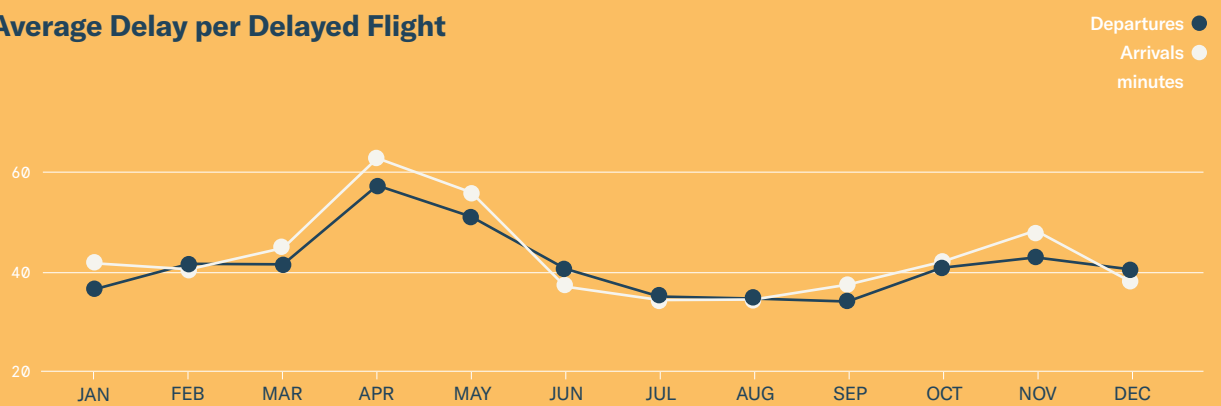
Monthly Punctuality Statistics

Month	Main Events Affecting Punctuality	Departing Flights		Arriving Flights	
		Proportion of Delayed Flights for more than 15 minutes	Average Delay (min) of Flights Delayed for more than 15 minutes	Proportion of Delayed Flights for more than 15 minutes	Average Delay (min) of Flights Delayed for more than 15 minutes
January	-	12.4%	36.6	10.2%	41.8
February	-	10.6%	41.7	8.8%	40.6
March	-	7.1%	41.6	5.9%	44.9
April	-	8.3%	57.5	7.1%	63.0
May	-	9.8%	51.2	7.5%	56.1
June	-	9.0%	40.7	6.7%	37.1
July	-	12.9%	35.1	12.0%	34.4
August	-	10.9%	34.7	8.1%	34.5
September	-	7.5%	34.1	5.4%	37.5
October	-	13.1%	40.9	9.9%	42.1
November	-	9.6%	43.0	6.5%	48.4
December	-	12.4%	40.6	9.7%	38.2
Total 2020	-	10.6%	42	8.5%	43

Proportion of Delayed Flights



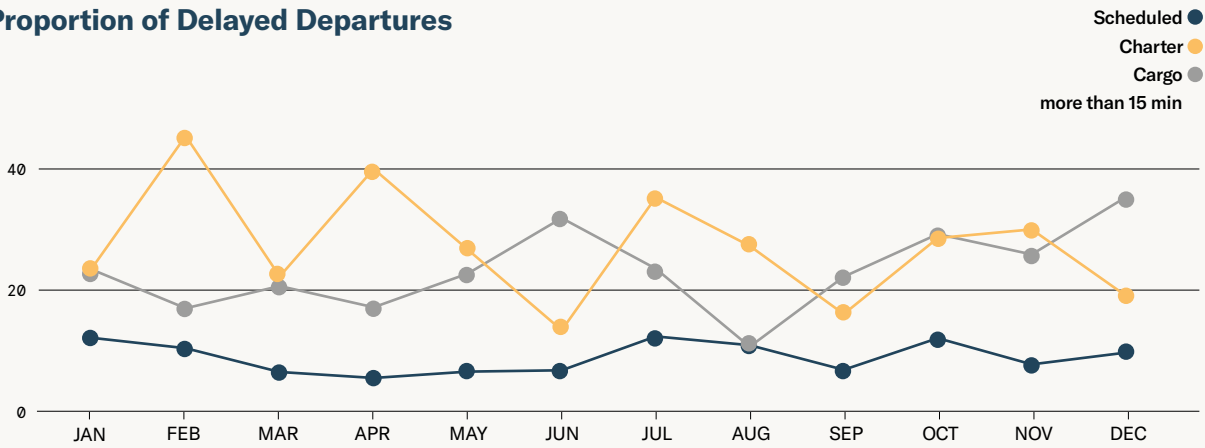
Average Delay per Delayed Flight



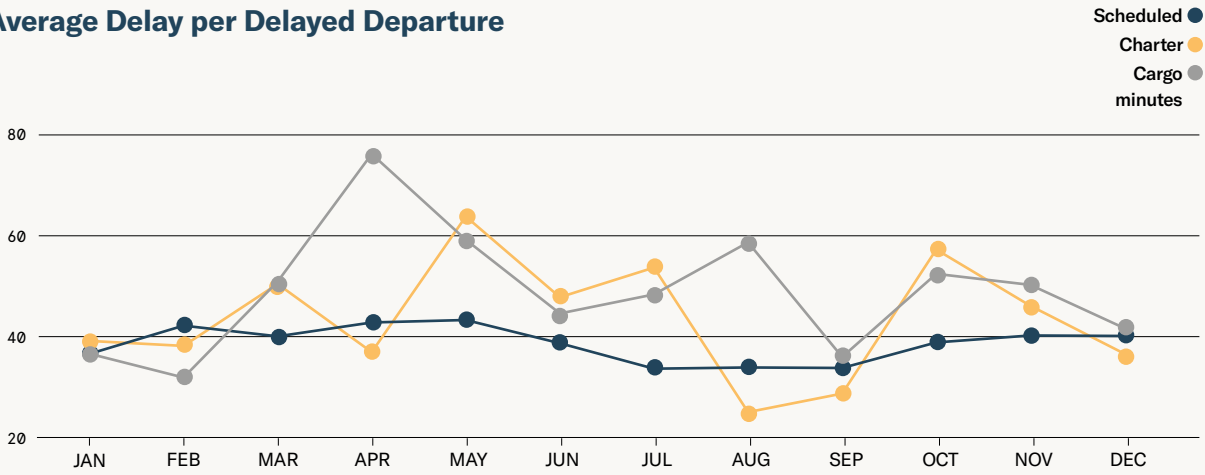
Proportion of Delay Reasons

Reasons for Delay	Arrivals	Departures	Reasons for Delay	Arrivals	Departures
Reactionary	29.49 %	31.51 %	Cargo & Mail	1.92 %	1.19 %
Airlines Internal	23.78 %	37.57 %	Mandatory Security	1.17 %	1.25 %
Restriction at Airport of Departure	9.17 %	3.89 %	Miscellaneous	0.80 %	0.38 %
Technical and Aircraft Equipment	7.25 %	3.92 %	Airport Facilities	0.71 %	1.74 %
Immigration Customs, Health	7.18 %	5.42 %	Restriction at Airport of Destination	0.29 %	0.18 %
Flight Operations and Crewing	3.52 %	1.43 %	EDP/Airline Automated Equipment Failure	0.18 %	0.20 %
Aircraft and Ramp Handling	3.05 %	2.86 %	Damage to Aircraft	0.16 %	0.24 %
Passenger & Baggage	3.03 %	3.81 %	Baggage Processing, Sorting, etc.	0.05 %	0.13 %
Weather	2.99 %	1.77 %	EDP/Other Automated Equipment Failure	0.03 %	0.11 %
Air Traffic Flow Management	2.84 %	1.39 %	Mail Only	0.00 %	0.02 %
Other	2.39 %	0.99 %	Airport Facilities - Not ATH	0.00 %	0.00 %
% of Delayed Flights for which a Delay Reason has been Reported				78.4%	90.0%

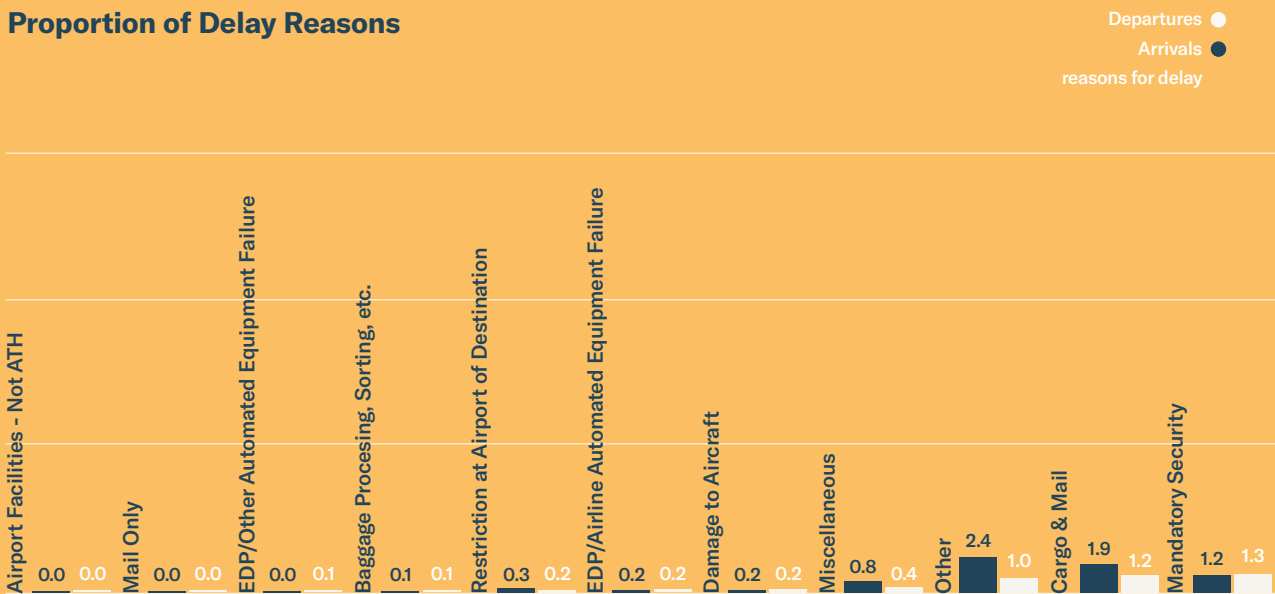
Proportion of Delayed Departures



Average Delay per Delayed Departure

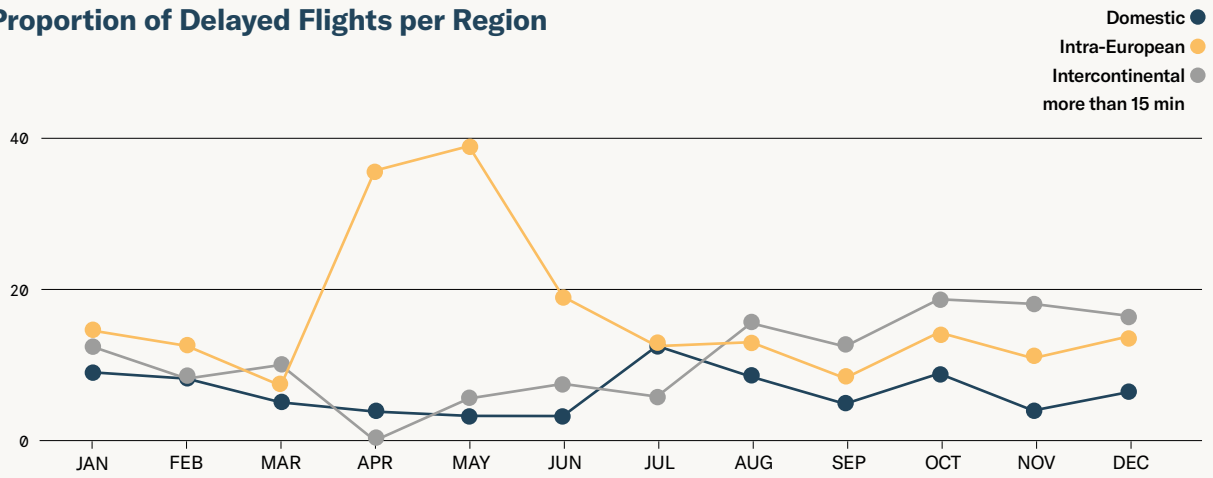


Proportion of Delay Reasons

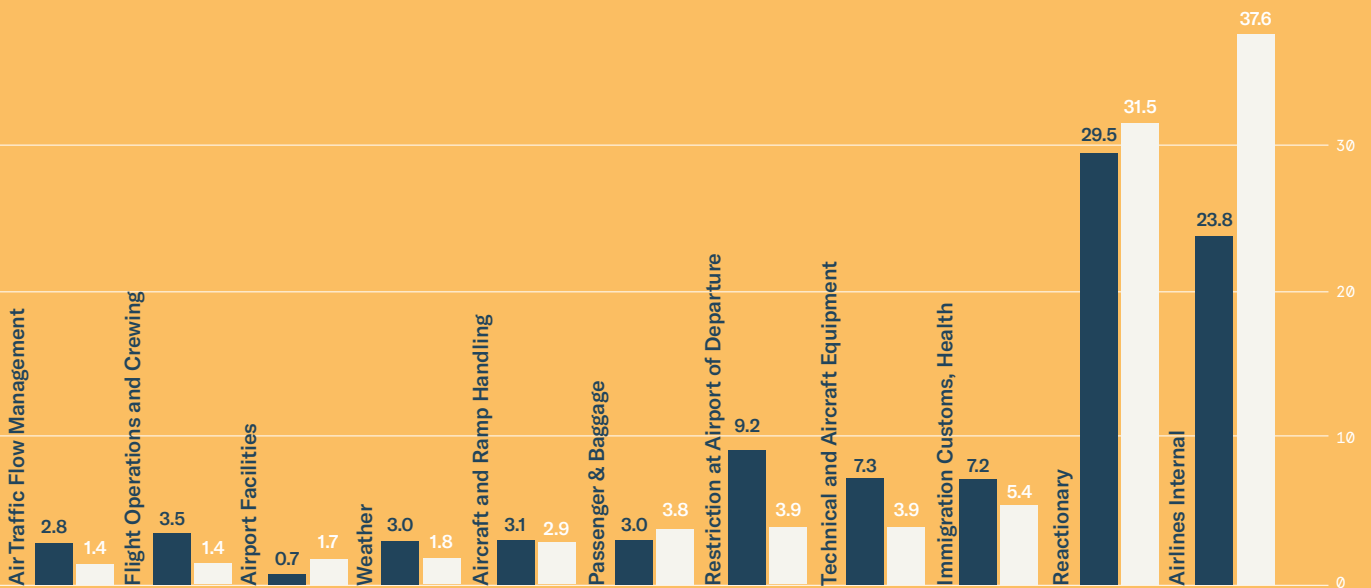
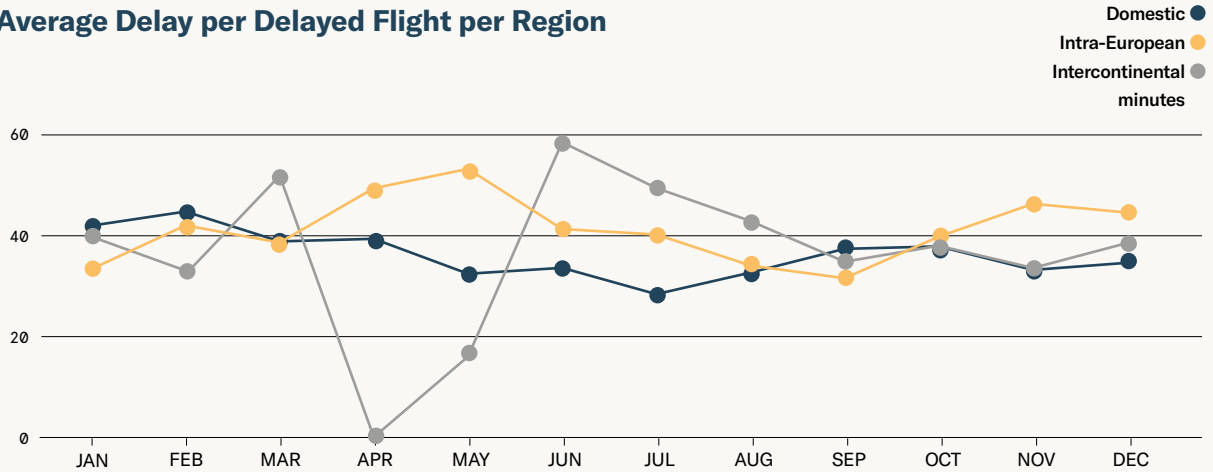


Departing Scheduled Flights

Proportion of Delayed Flights per Region



Average Delay per Delayed Flight per Region



7

Our Grade Report

Covid-19 severely affected airport operations, incl. passenger processing, with passengers reaffirming their confidence in AIA during the pandemic with high evaluation scores

The Airport Company remains firm on its commitment to creating the optimum experience for the travelling public by providing safe, secure, efficient and value-adding services. To continuously improve its services, AIA monitors passenger satisfaction through various tools ranging from structured surveys to direct communication, which are followed by certain initiatives, if necessary.

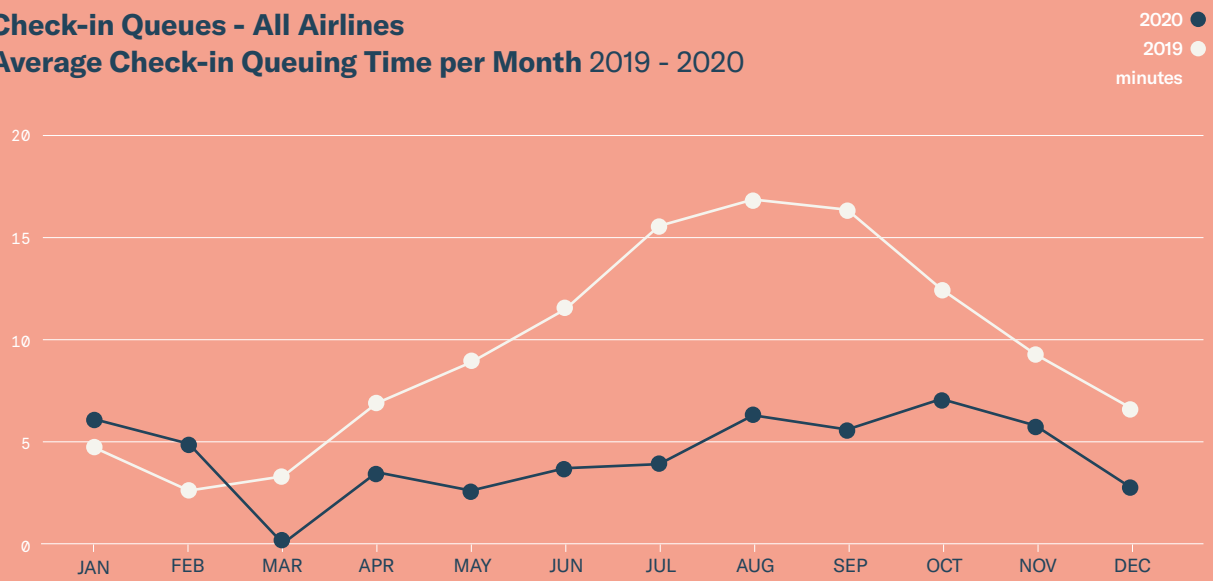
Covid-19 pandemic severely affected airport operations and AIA personnel was called upon to assist passengers during their stay in the Terminal areas and effectively – timely and accurately – inform the public contacting the Airport Call Centre and / or reaching out through other channels of communication. Around the clock, AIA's staff assisted with passenger flow, queue management and arrival and transfer processes, monitored compliance with social distancing and mask use, and alleviated passenger stress over the existing procedures, ie. presenting a negative PCR test, the digital Passenger Locator Form and the conduct of Covid-19 testing, upon their arrival in Greece.

Despite the record low levels of traffic, AIA staff facilitated more than 1.6 million people, overwhelmed by uncertainty over Covid-19 procedures and restrictions. The successful handling of nearly 350,000 telephone enquiries, 92% of which were answered within 20", led to AIA winning a Gold Award for the best call centre in Greece. AIA's e-mail, airport_info@aia.gr received more than 7,500 enquiries in 2020, all addressed timely and with diligence, while social media responded immediately to each and every request.

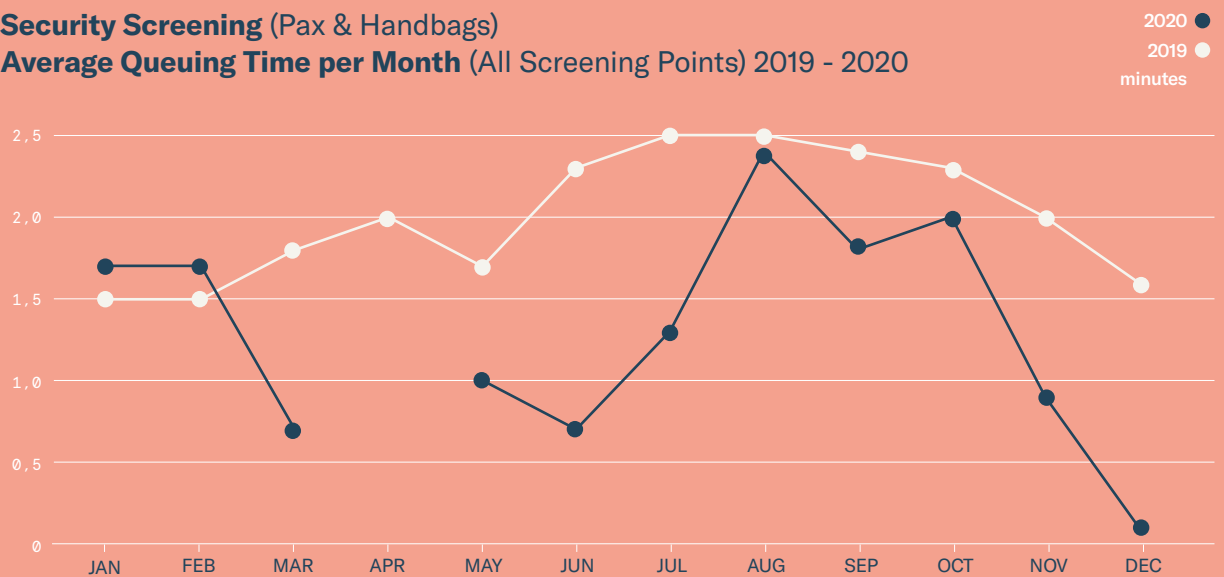
Within the Company's commitment to continuously improving services offered to the travelling public, emphasis is placed on managing passenger comments, analysing them monthly and communicating relevant information. In a year strongly affected from the Covid-19 pandemic, AIA received 1,681 comments from 991 passengers (vs 6,098 comments from 2,362 passengers in 2019). The majority of the comments received, namely 352, were related to the pandemic. A total of 381 letters of response were dispatched of which 96.5% were personalised. The average response time for the year was 7.8 days.

The Airport's market research, which was coupled with specially designed surveys during Covid-19, illustrated that the travelling public evaluated cleaning & disinfection measures (air conditioning system filtering, regular surface sanitisation, hand-sanitiser stations) as the measures that made them feel safe & secure, followed by self-protection measures to a lesser extent and health-check measures being considered of a lower impact. Regarding the implementation of specific Covid-19 measures, including the efficiency of safety & hygiene measures, clarity of signage & instructions, as well as the staff's competency to apply measures, passenger satisfaction proved resilient and the respective scores were high (4.1 out of 5). Passengers overall evaluated the Airport at 4.35, casting their "vote of confidence" to AIA even during the dire pandemic situation.

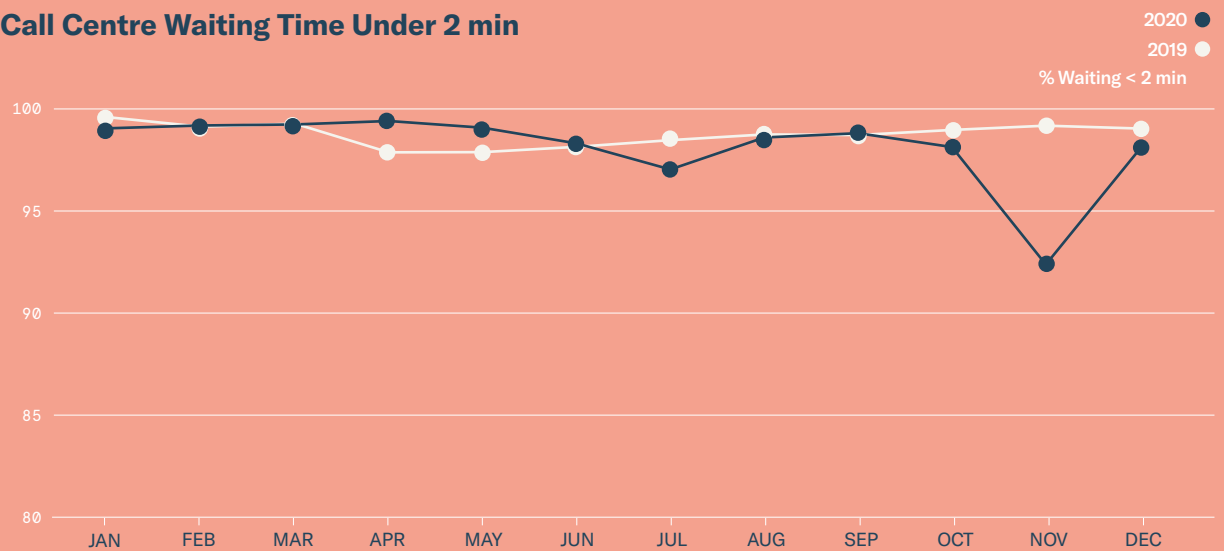
Check-in Queues - All Airlines Average Check-in Queuing Time per Month 2019 - 2020



Security Screening (Pax & Handbags) Average Queuing Time per Month (All Screening Points) 2019 - 2020

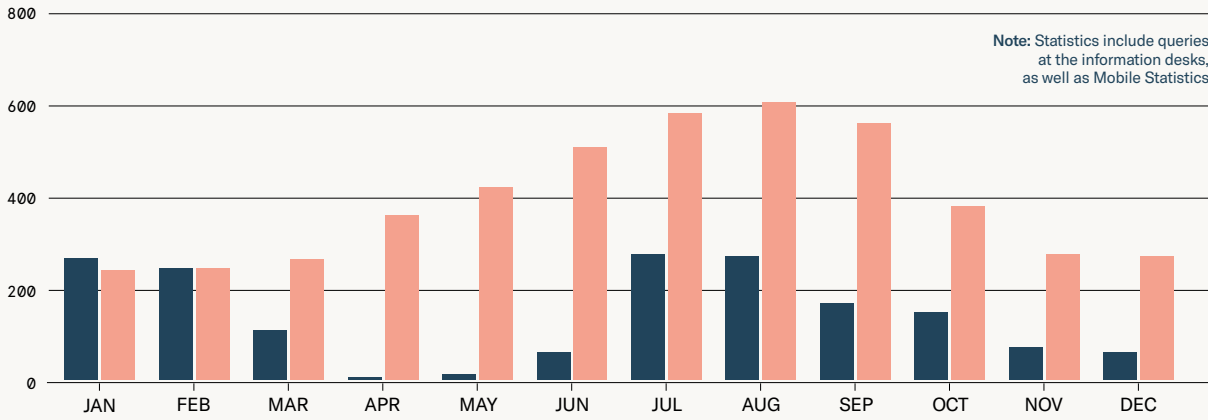


Call Centre Waiting Time Under 2 min



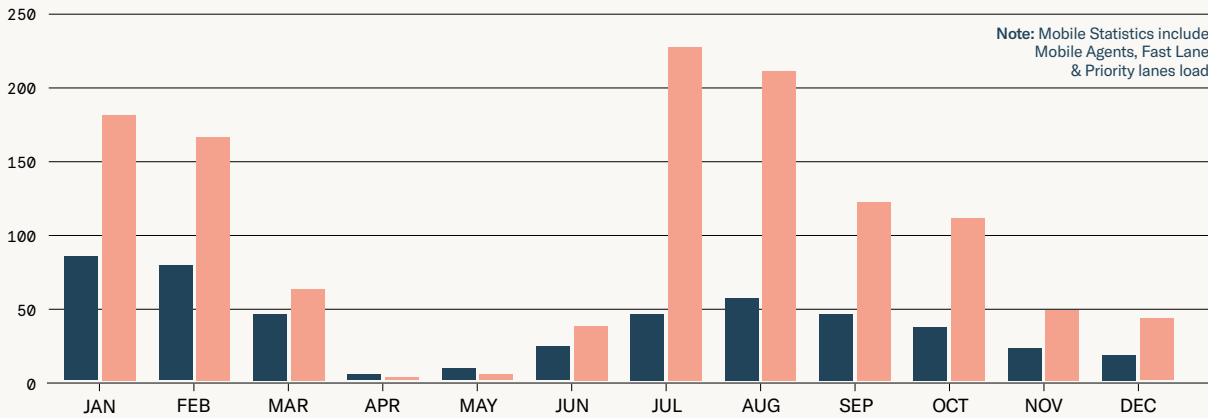
Information Provision (Avg Queries per Hour)

2020 ●
2019 ●



Information Desk & Mobile Loading (Avg Queries per Hour)

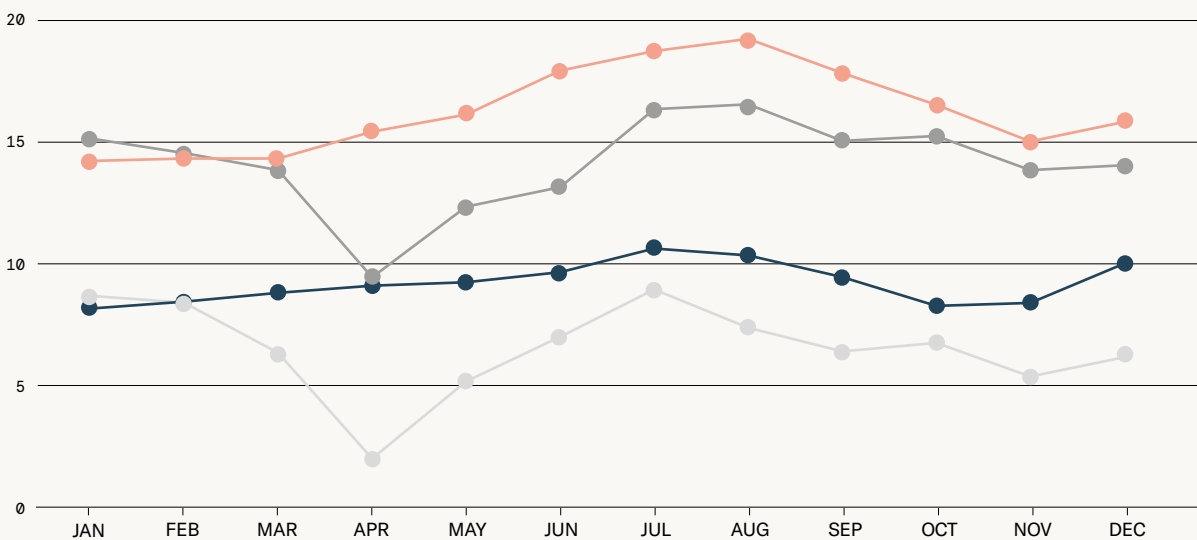
Info 2020 ●
Mobile 2020 ●



Baggage Delivery Service

Average Time for First and Last Bag from "on-blocks" Time 2019 - 2020

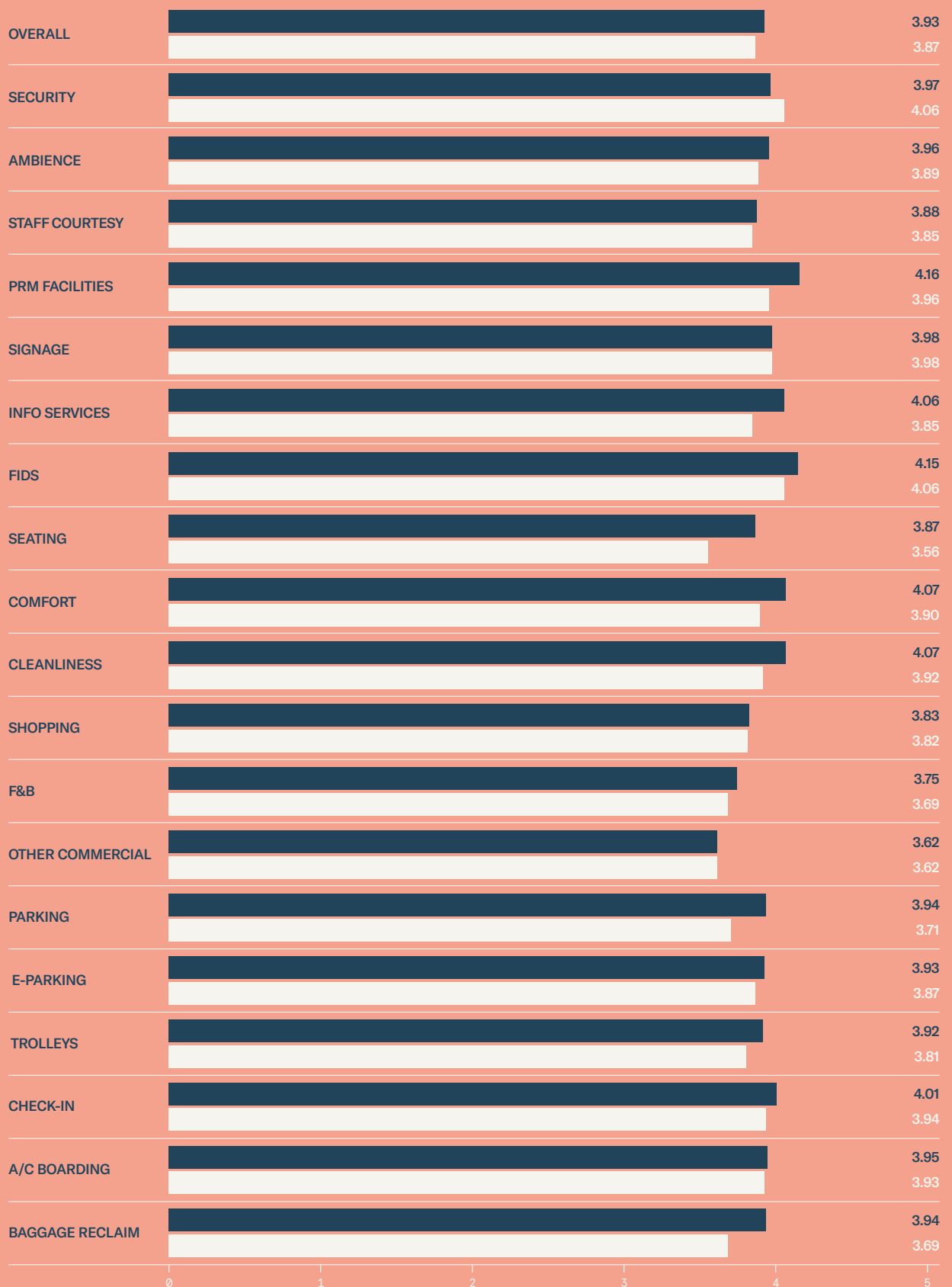
2019 Obl-Fb ●
2020 Obl-fb ●
2019 Fb-Lb ●
2020 Fb-Lb ●



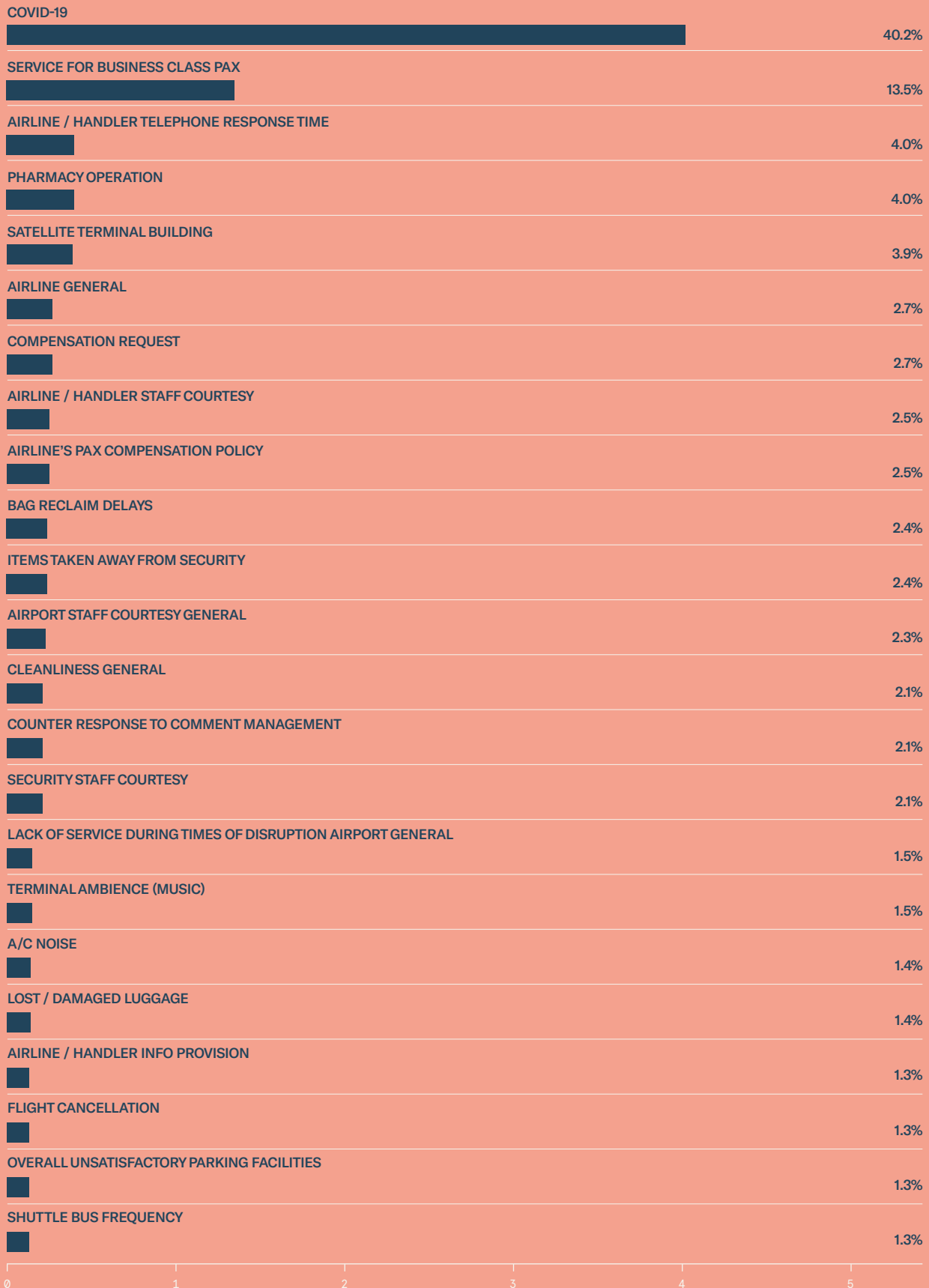
Airport Services Evaluation Comparison 2019 - 2020

Average Rating of Services (1-5 scale)

2020 ●
2019 ●



Passenger Comments 2020



With regards to Covid-19, what measures taken at the airport would make the passenger feel safer to travel by air in the next months?

Cleaning & Disinfection Measures



57%

Air conditioning system filtering dust, viruses and bacteria or fungi, through special filters



56%

Facilities, machinery, equipment & frequently touched surfaces sanitized regularly



54%

Hand sanitizer stations throughout the airport

Self Protection Measures



52%

Active 1.5m social distancing



50%

All employees & pax wearing face masks & gloves



42%

Seating rearrangements to allow min distances

Health Checks Measures



36%

Temperature screening of all pax



34%

Covid-19 testing at the airport

SOURCE: InfluenAIRs

AIA's evaluation regarding Covid-19 measures

						SATISFACTION SCORE:
	5	4	3	2	1	
Efficiency of safety & hygiene measures	40%	36%	23%	1%		4.15
Clarity of signage & instructions	39%	37%	23%	1%		4.14
Ability of staff to apply measures	40%	35%	24%	1%		4.15

AUG-DEC 2020
N=3,957

On a five-point scale, where 5 stands for "very satisfied" and 1 "very dissatisfied"

SOURCE: PASSENGER SURVEY

8 Joining the Passenger Dots

The pandemic changes the demographic and travelling passengers' profile; Visiting Friends & Relatives the most resilient segment

In 2020, Covid-19 also impacted the demographics and travelling identity of passengers travelling through Athens International Airport, which were differentiated compared to 2019.

Younger groups proved less stressed regarding travelling during the pandemic, therefore, more ready to travel by air. Hence, 18-34 year-olds represented 36% of AIA's passengers, compared to 29% in 2019 and thus reducing the average age to 40 years old, down from 42 in 2019. As a result of the travel restrictions and bans between countries, foreign residents accounted for 50% of the passenger throughput, a reduced share compared to 2019 (64% of the total traffic in 2019), with the majority coming from the EU (37%) and rest of Europe (5%). The other half were Greek residents, who considerably increased their market share (36% in 2019), with the same trend emerging for Greek nationals (58%, as opposed to 40% in 2019).

As expected, leisure travellers were reduced in 2020 and accounted for 76% of the passenger base (85% in 2019). "Holidays and tourism" remained the primary purpose for travel by 58% (75% in 2019); however, Visiting Friends and Relatives (VFR) increased to 35% (21% in 2019), rendering this the most resilient segment in this new era. On the other hand, business travelling increased to 24% in 2020, mainly thanks to Greek residents travelling domestically for business.

The significantly increased proportion of Greek travellers to the total traffic and the VFR traffic increase contributed to the rise of air trips from Athens International Airport to 3.6 times a year

per passenger from 2.6 in 2019. Foreign passengers stayed in Greece an average of ten days, of which five spent in Athens, illustrating that interest in the capital city of Greece was sustained. Greeks also spent ten days on average at their destination, as opposed to nine days in 2019.

Booking via airlines' websites has been a growing trend these past years, with 84% of passengers reserving their air tickets this way (73% in 2019). However, there was a shorter reservation period since passengers purchased their tickets on average 37 days in advance (60 days in 2019), indicating the uncertainty for the pandemic and potential air travel restrictions. It was apparent both for foreign and Greek residents, who booked their air trip 45 and 29 days prior to departure, respectively, compared to 72 and 29 days in 2019.

Transfer passengers represented a lower share than last year (14% as opposed to 19% of total traffic in 2019), with the decline attributed to the significantly reduced air services offered, and to the dramatic drop in passenger demand. Transferring between a domestic and an international destination decreased in 2020 to 81% (86% in 2019). The top domestic destinations for transfer passengers remained Santorini (13%) and Heraklion (11%). The top international destinations for transfer passengers were France and Germany, each representing 14% of connecting passengers, followed by the United Kingdom (11%) and Italy (9%). Indirect traffic was decreased at 8% in 2020 compared to 12% in 2019.

Gender

2020 ●
2019 ●
% Market Share



Male



50%

49%



Female



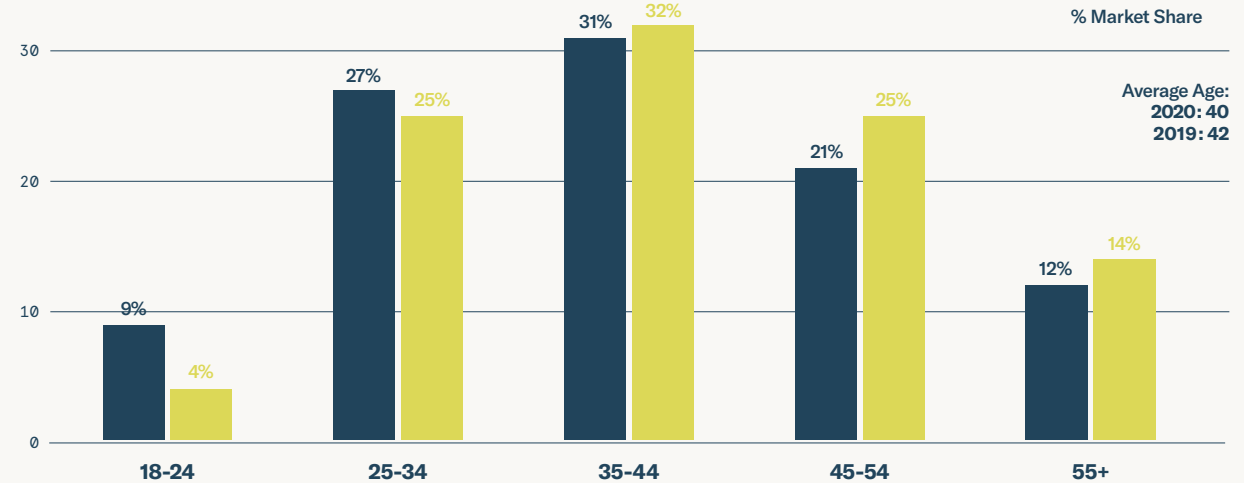
50%

51%

0 25 50 75 100

Age (years)

2020 ●
2019 ●
% Market Share

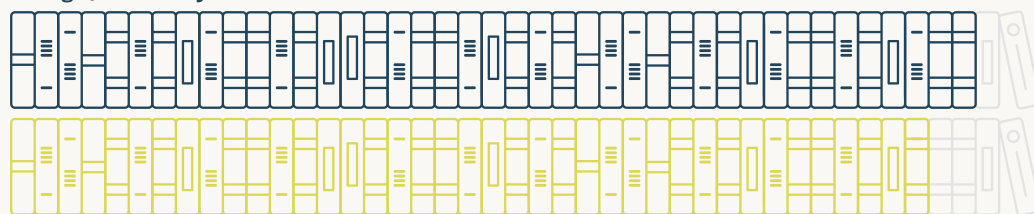


Average Age:
2020: 40
2019: 42

Education

2020 ●
2019 ●
% Market Share

College / University



97%

95%

High School

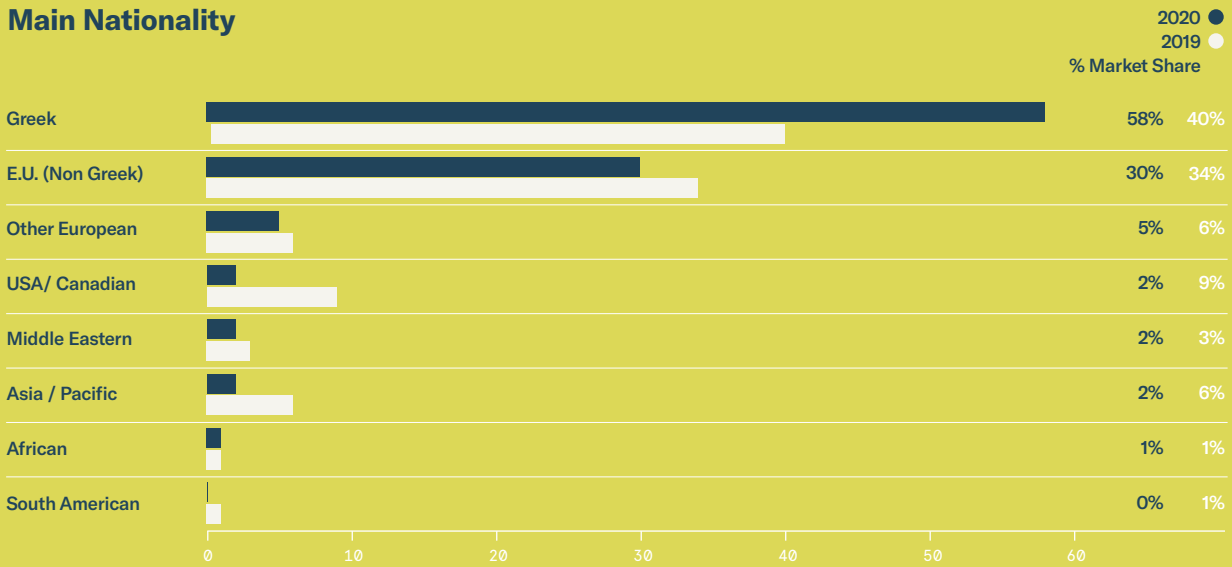


3%

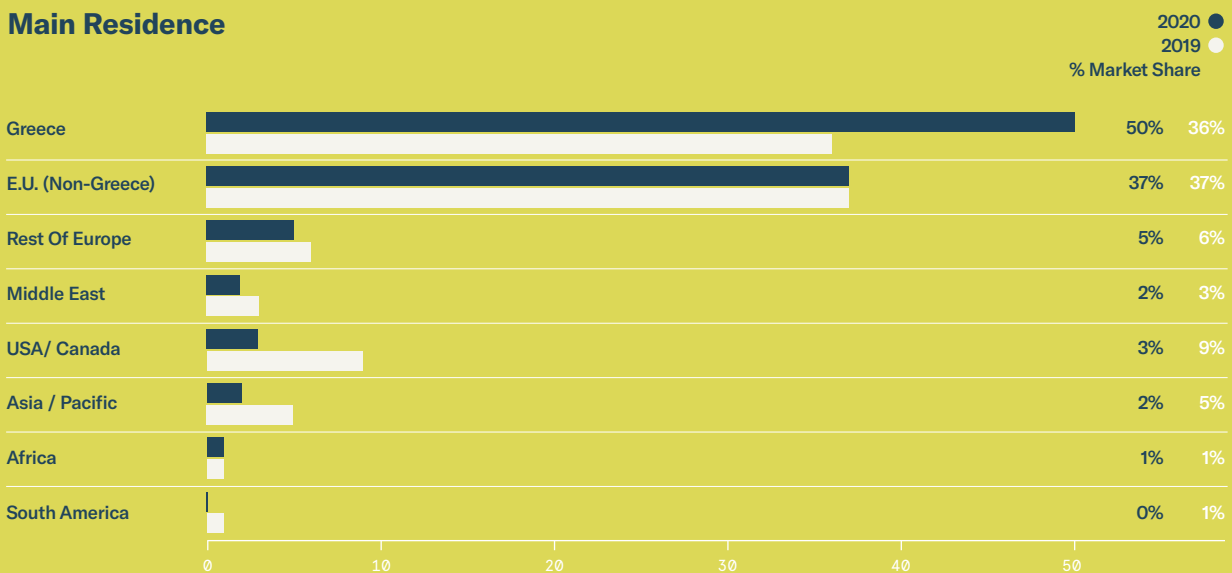
5%

0 25 50 75 100

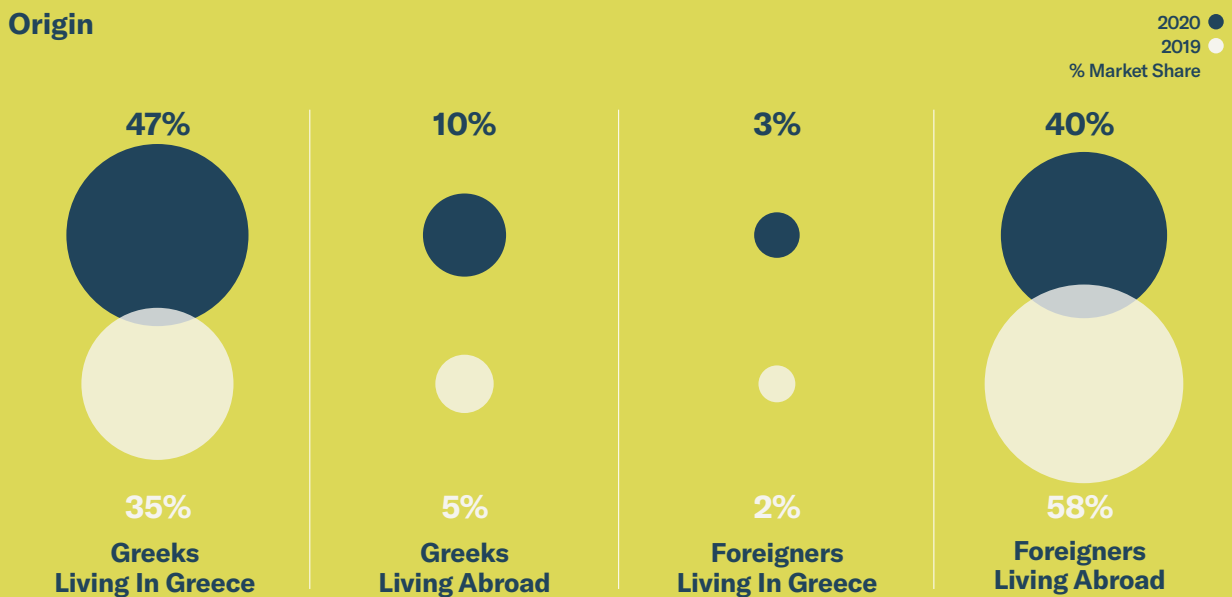
Main Nationality



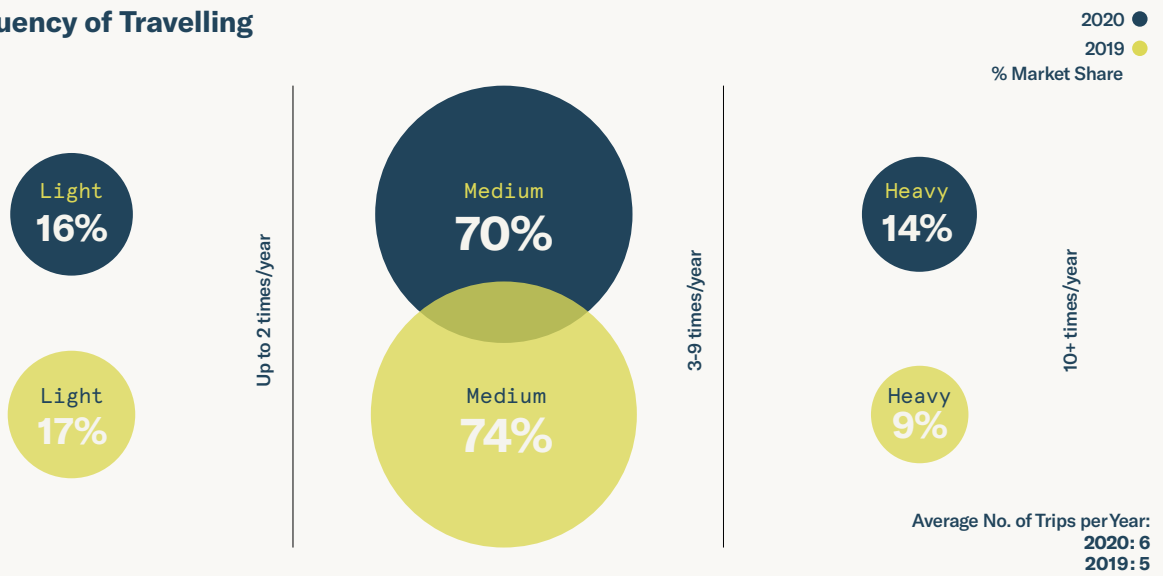
Main Residence



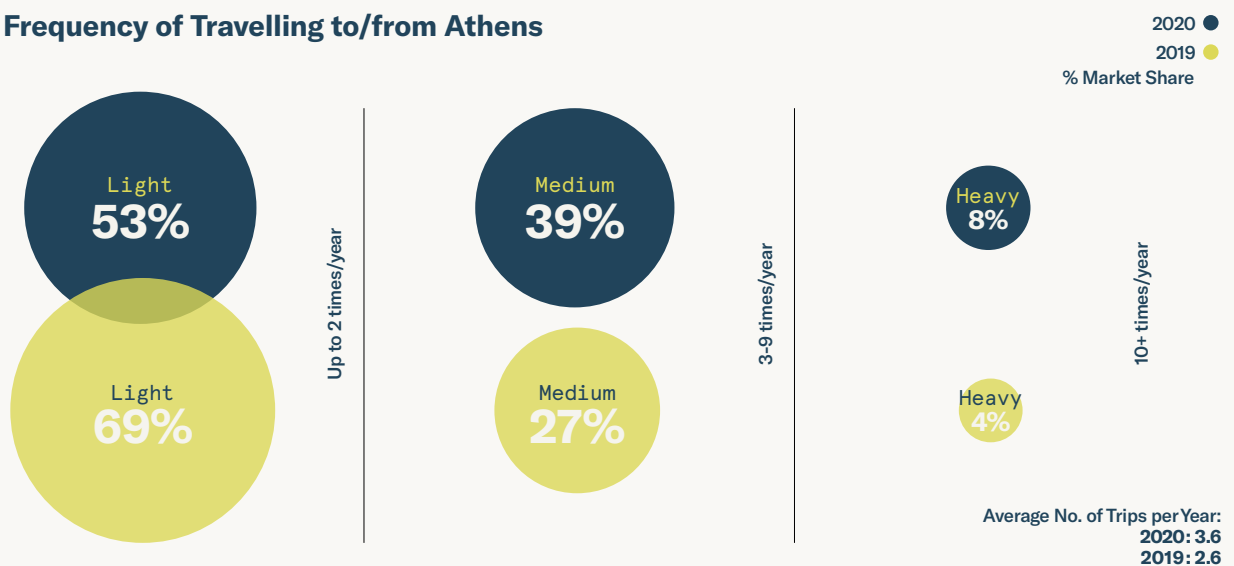
Origin



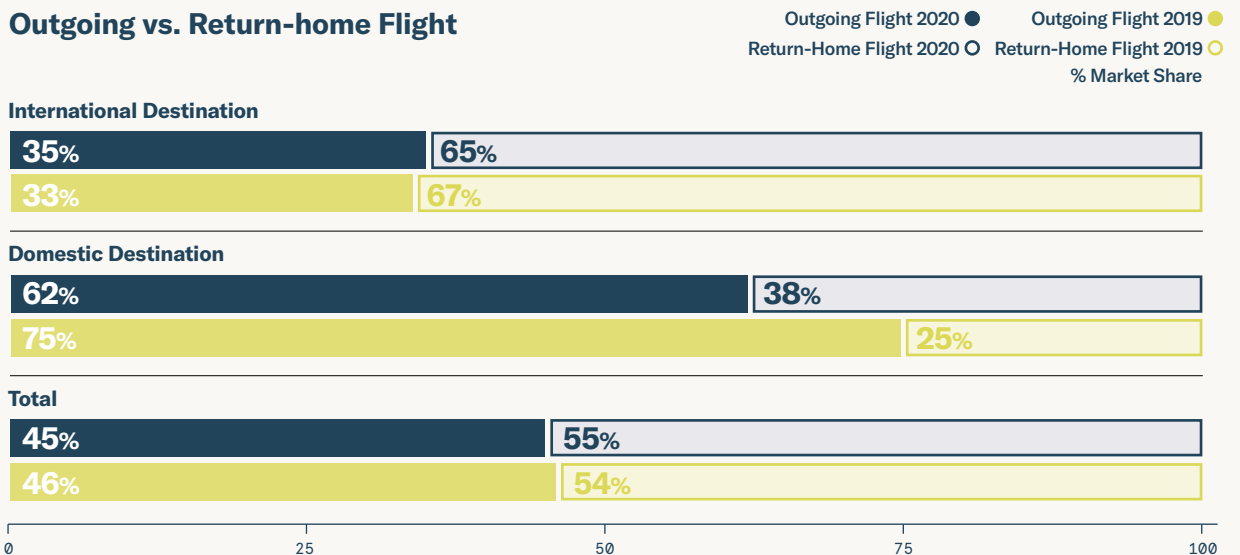
Frequency of Travelling



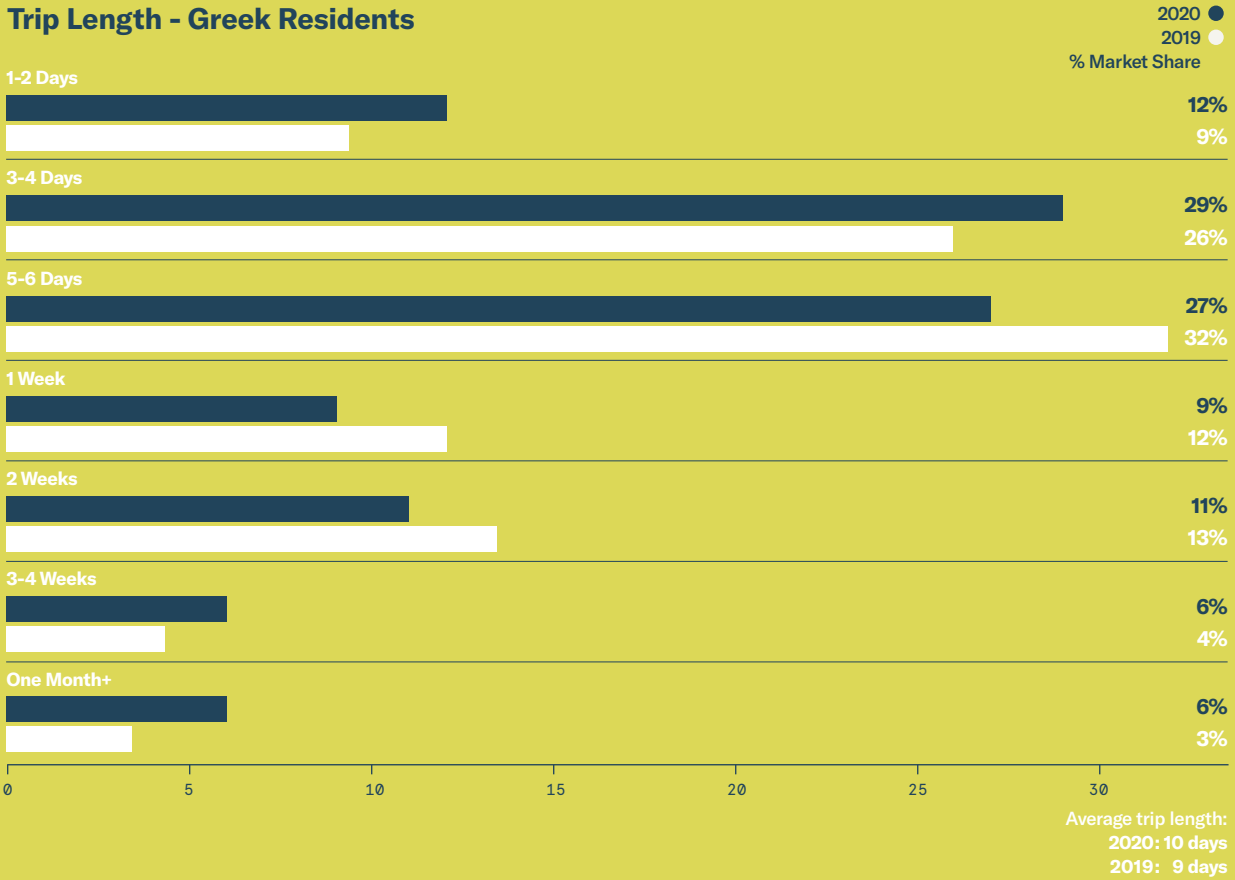
Frequency of Travelling to/from Athens



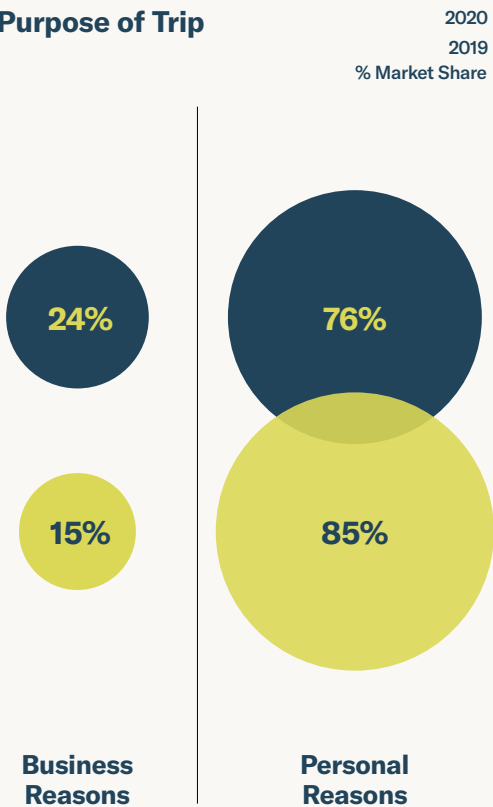
Outgoing vs. Return-home Flight



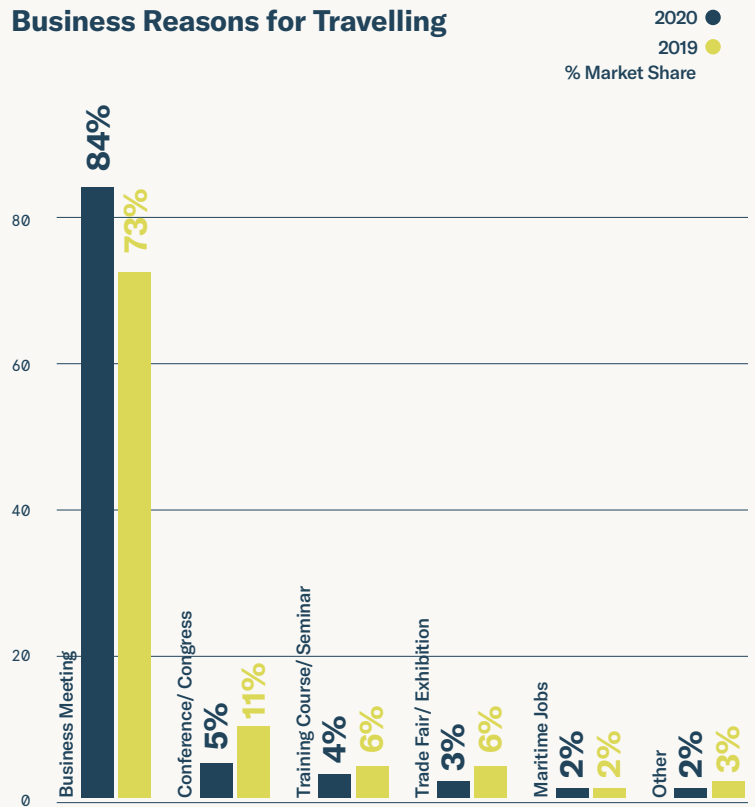
Trip Length - Greek Residents



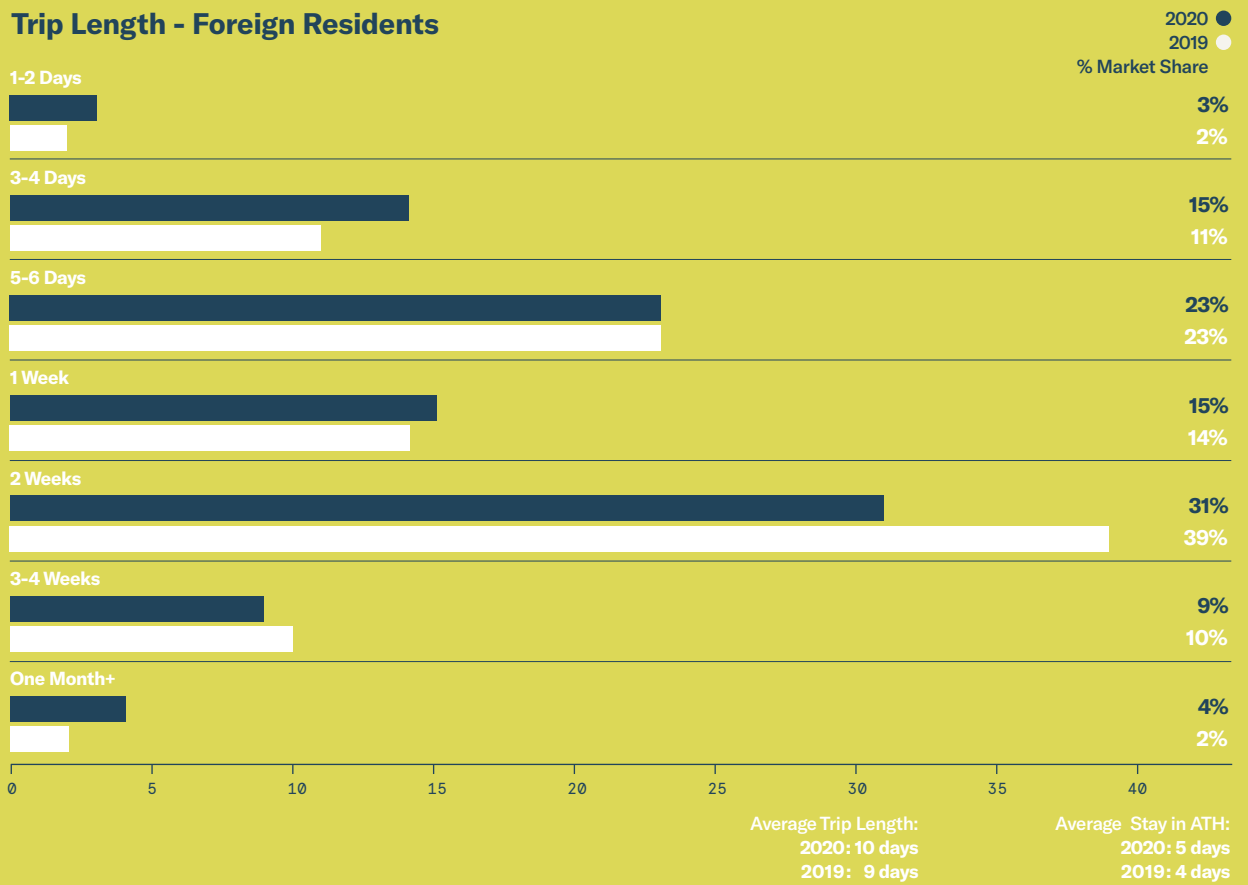
Purpose of Trip



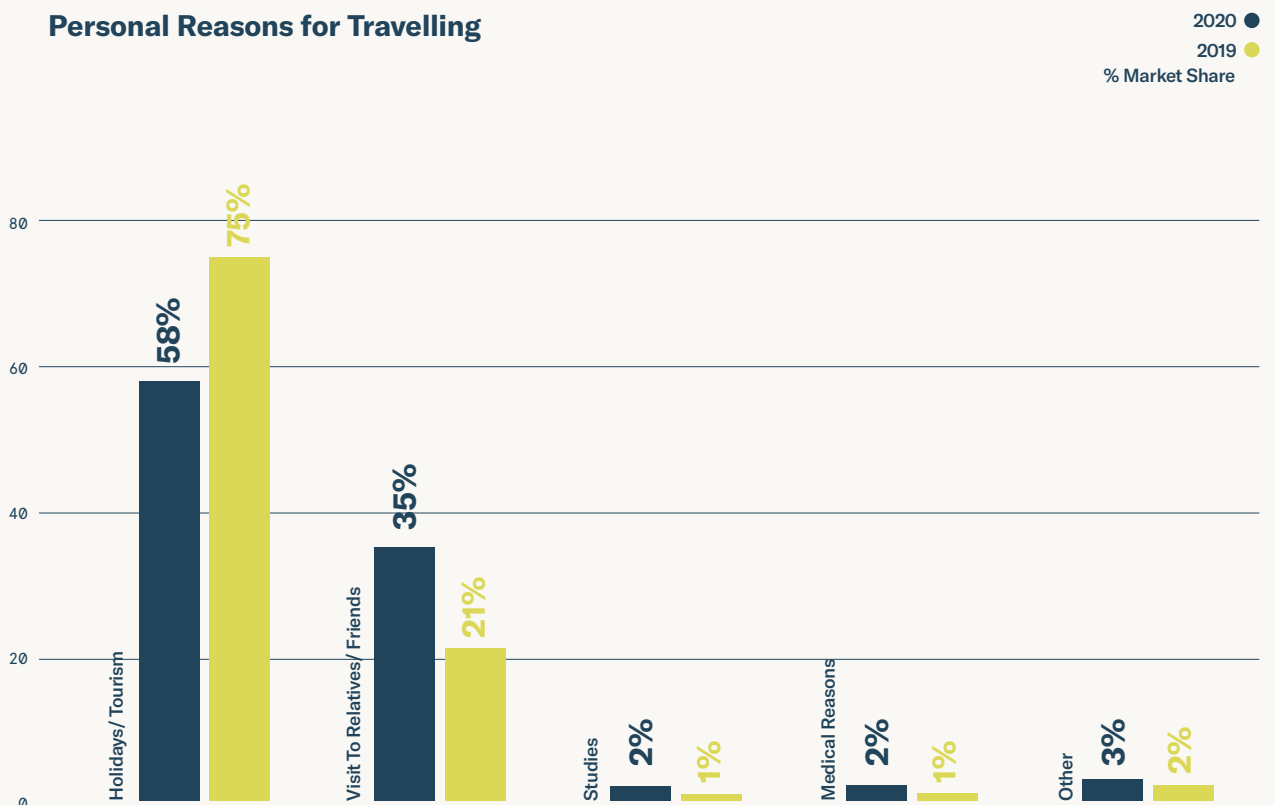
Business Reasons for Travelling



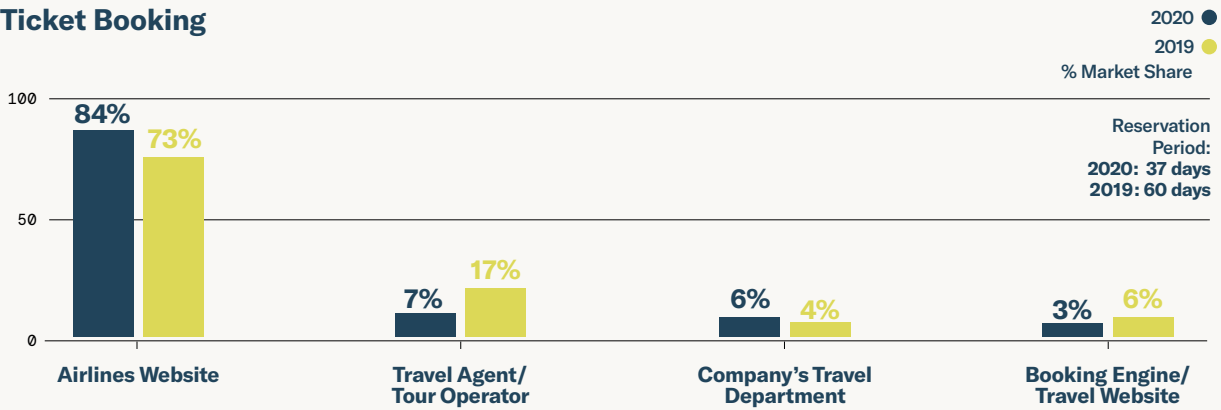
Trip Length - Foreign Residents



Personal Reasons for Travelling



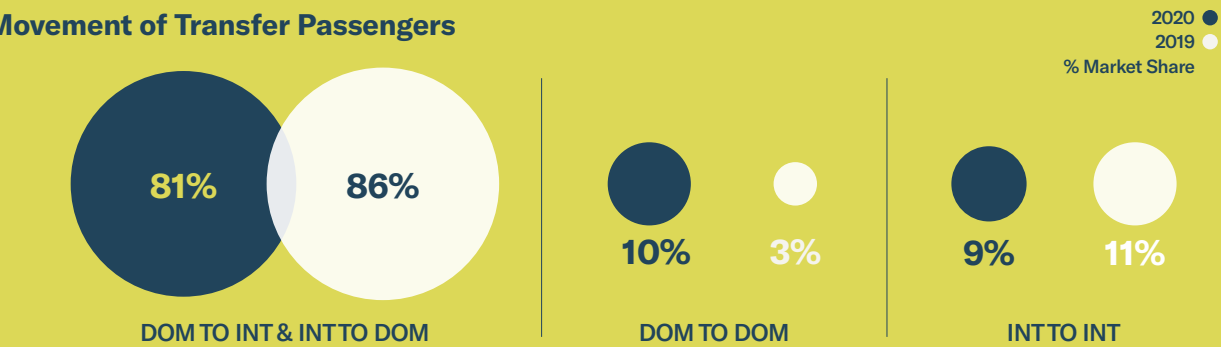
Ticket Booking



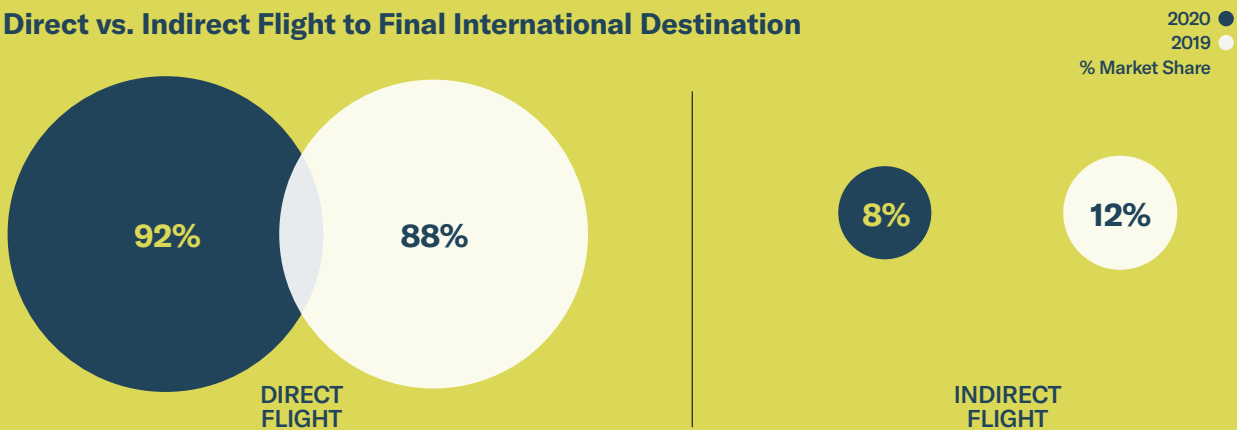
Transfer Passengers



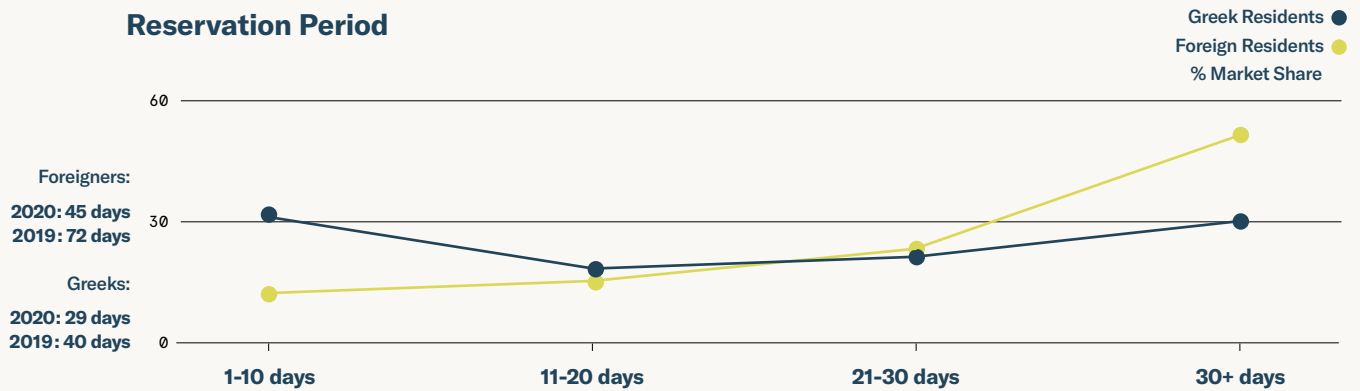
Movement of Transfer Passengers



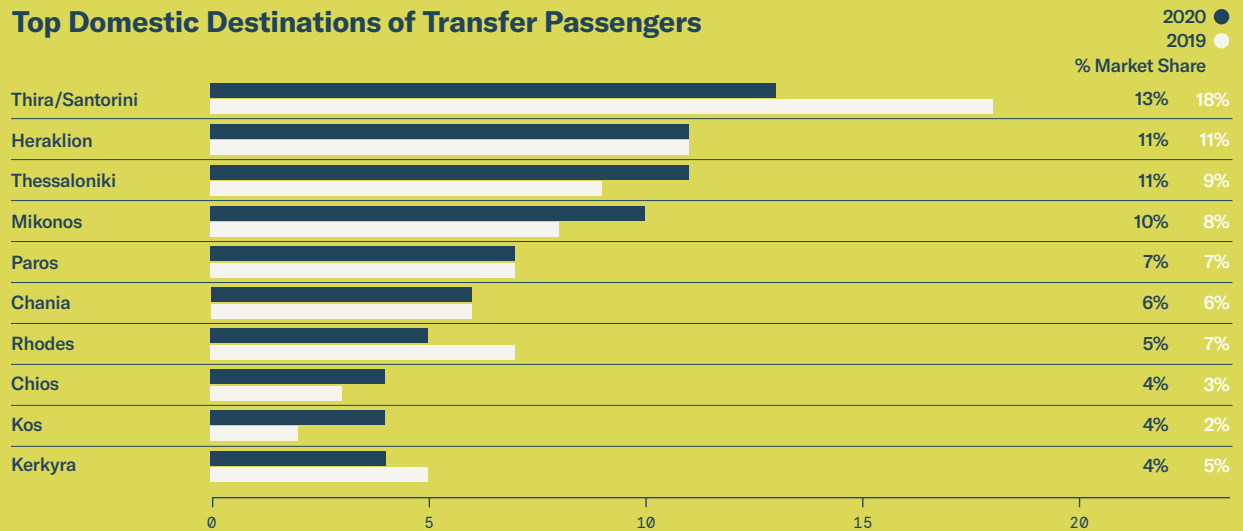
Direct vs. Indirect Flight to Final International Destination



Reservation Period



Top Domestic Destinations of Transfer Passengers



Top International Destinations of Transfer Passengers



9 Adding Tourists

Uncertainty and travel restrictions due to the pandemic resulted to limited incoming traffic

Incoming foreign visitors at Athens International Airport were limited to 1.6 million arriving in 2020. The great majority travelled to Greece for leisure; “Visiting Friends & Relatives” was the primary motive for their trip. Although the first quarter of the year showed positive signs, the pandemic effects were devastating during the period that followed.

Due to travel restrictions imposed as a result of the pandemic, Europe was the main source of incoming travellers, with Western Europe being the core region, while third countries were present only at the first quarter of the year. The traditionally largest European markets for leisure traffic, namely Germany, the United Kingdom and France, remained at the top of the list, with Italy dropping down on this rank.

More passengers who reached Athens preferred to stay in the city this year rather than transfer to a domestic destination via Athens Airport. Among those who transferred to other Greek destinations for leisure purposes, Santorini remained at the top of the favourable spots, followed by Mykonos and Paros, which attracted a slight preference this year. Incoming visitors spent half of their 10-day stay in Greece, i.e. an average of five days, to visit the metropolitan city.

As a result of the pandemic, incoming business traffic gave negative signs, especially from April to October. The limited business travellers mainly originated from Western European countries and stayed in Athens for five days on average. Transferring via Athens to the rest of Greece for business was limited to a minimum.

Greek residents were also very sceptic about travelling abroad whether for leisure or business. Foreign destinations featuring a Greek community were top picks for Greek air travellers. Therefore, Cyprus, Germany, Italy and the United Kingdom were the most popular international destinations. Greeks’ trips abroad lasted for ten days on average for those taken for leisure purposes and six for those travelled for business purposes.

Incoming Passenger Development

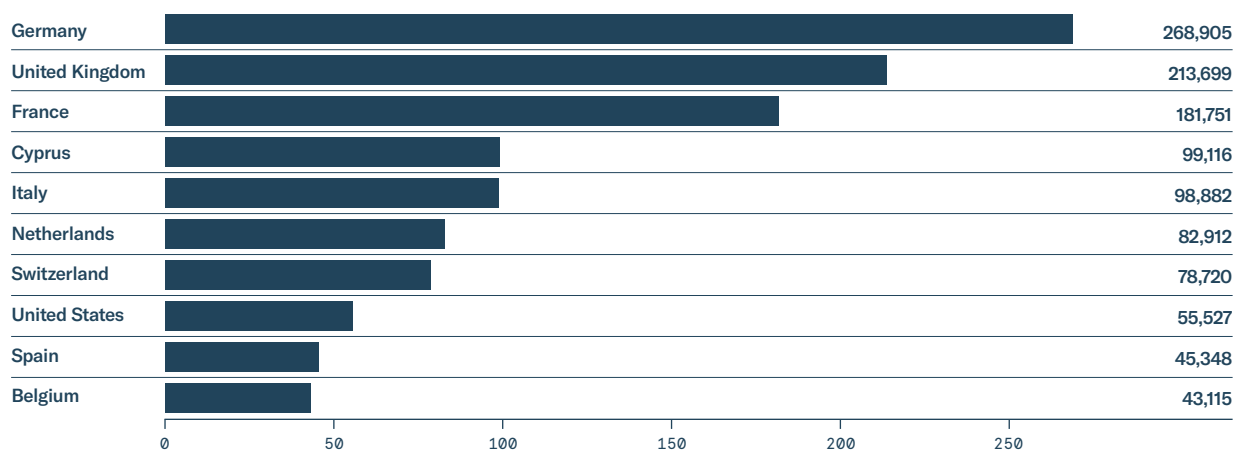
Passengers 2020 ●
Passengers 2019 ●



Incoming Leisure Traffic

Top 10 Countries of Incoming Leisure Traffic Arrivals

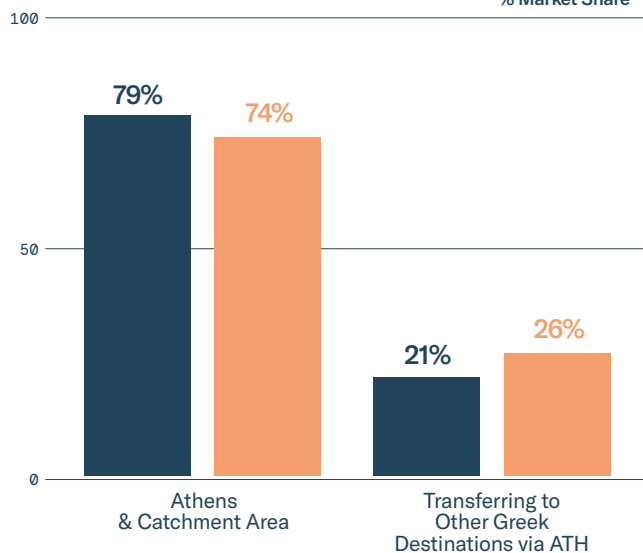
Passengers 2020



Incoming Leisure Traffic Visiting Athens & Catchment Area

2020 ●
2019 ●

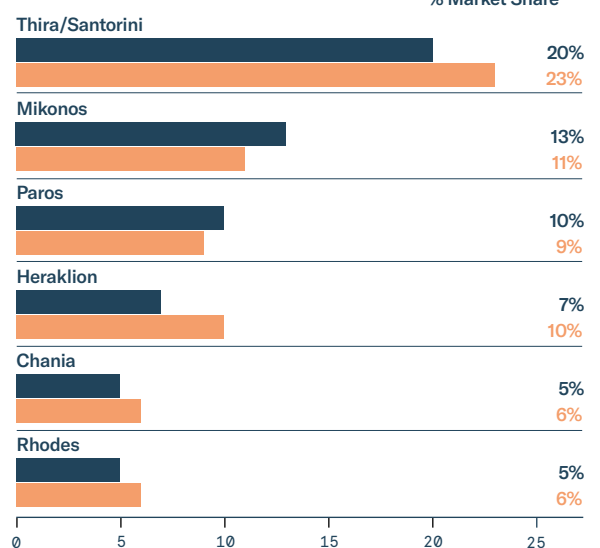
% Market Share



Top Incoming Leisure Traffic Destinations in Greece via Athens

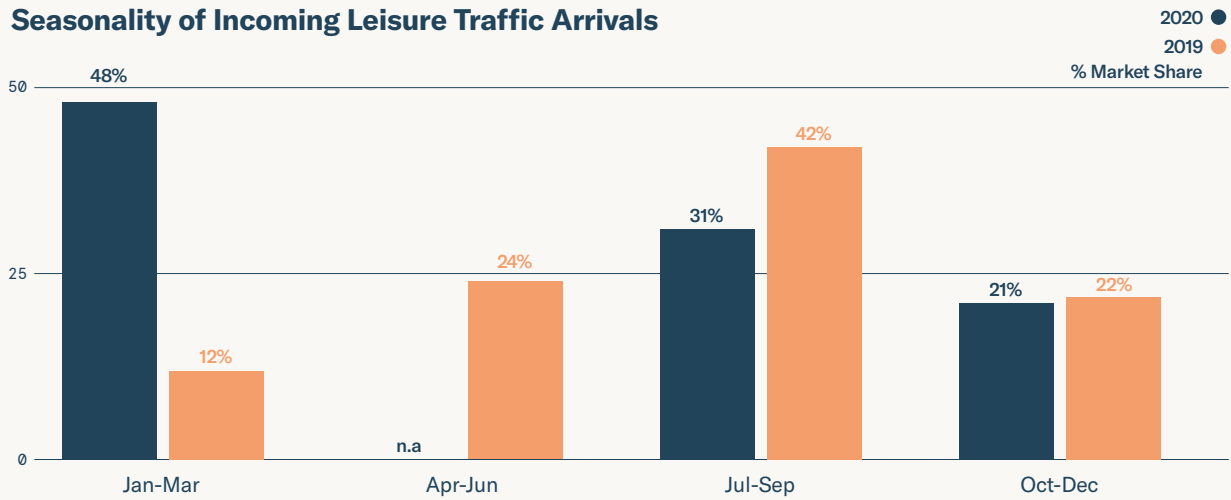
2020 ●
2019 ●

% Market Share

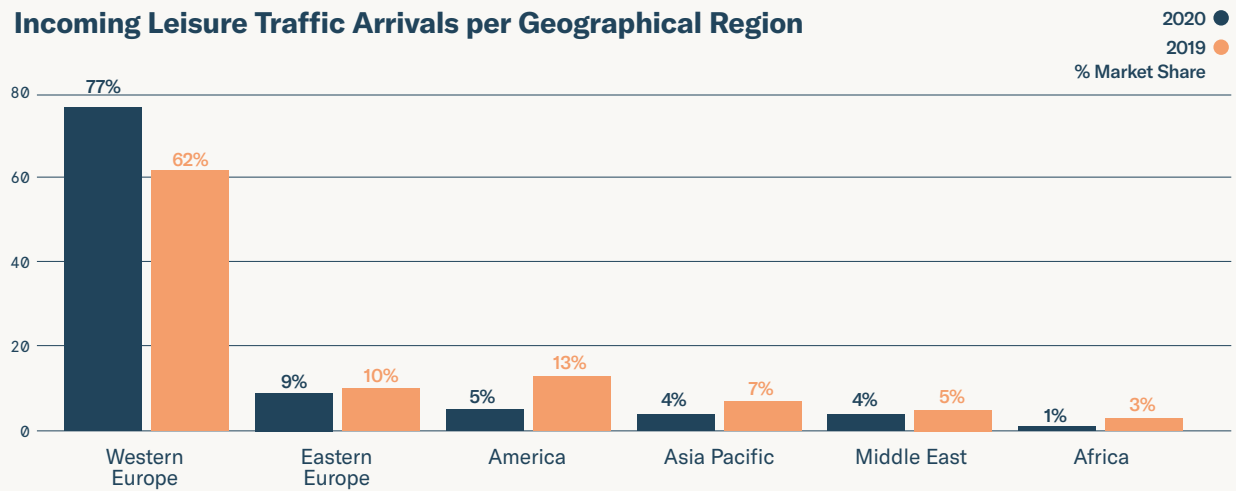


Incoming Leisure Traffic

Seasonality of Incoming Leisure Traffic Arrivals

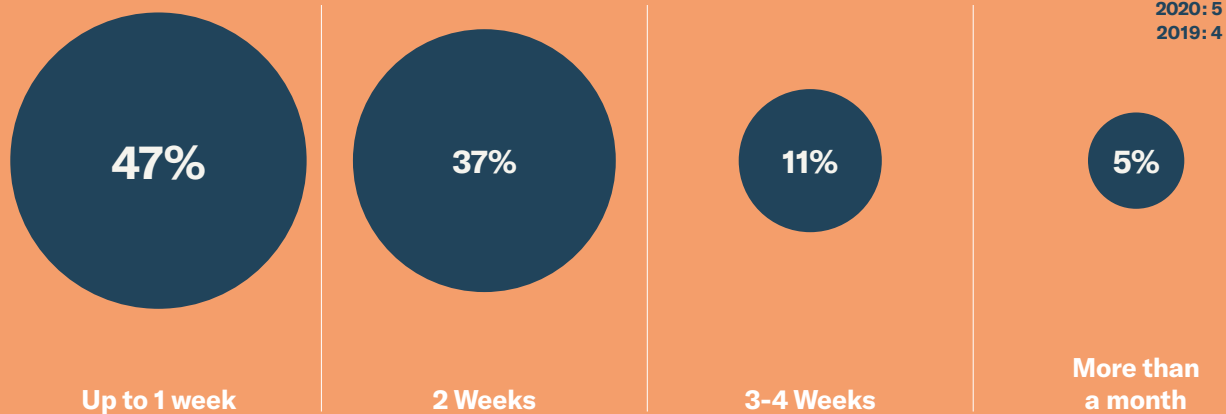


Incoming Leisure Traffic Arrivals per Geographical Region



Length of Stay in Greece - Incoming Leisure Traffic

% Market Share

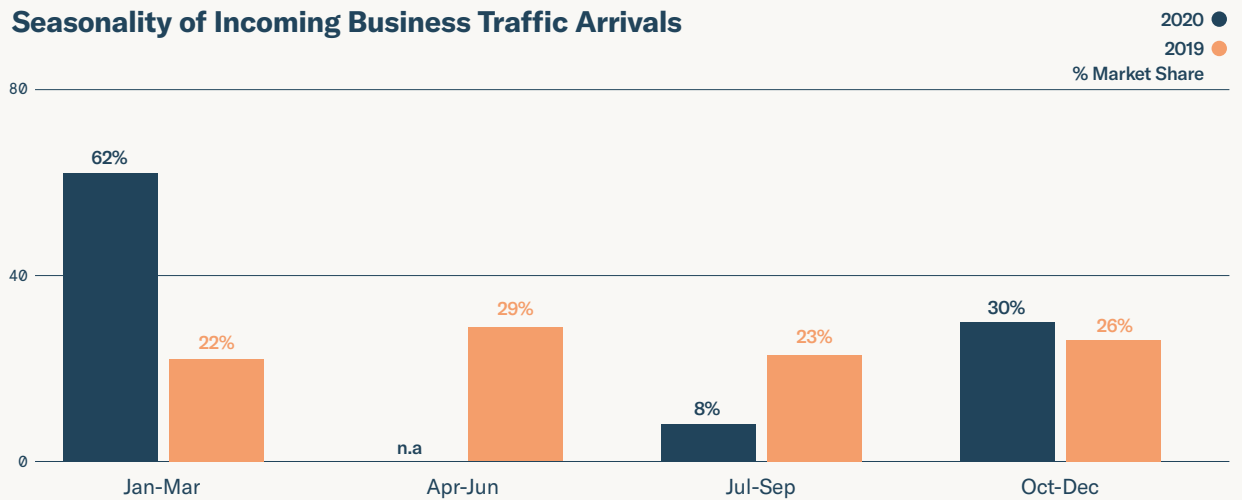


Average days in Greece:
2020: 10
2019: 9

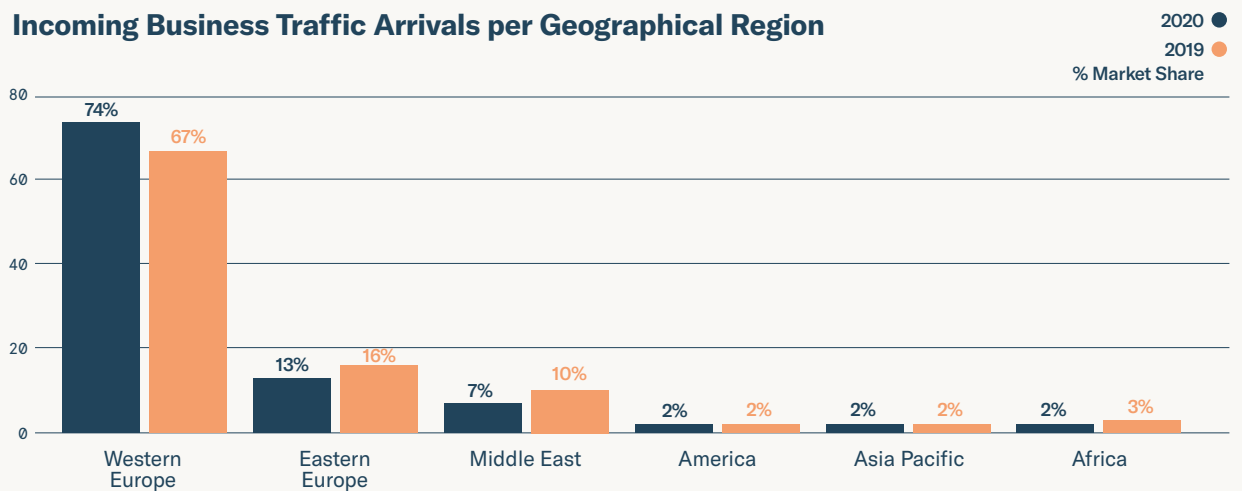
Average days in Athens:
2020: 5
2019: 4

Incoming Business Traffic

Seasonality of Incoming Business Traffic Arrivals



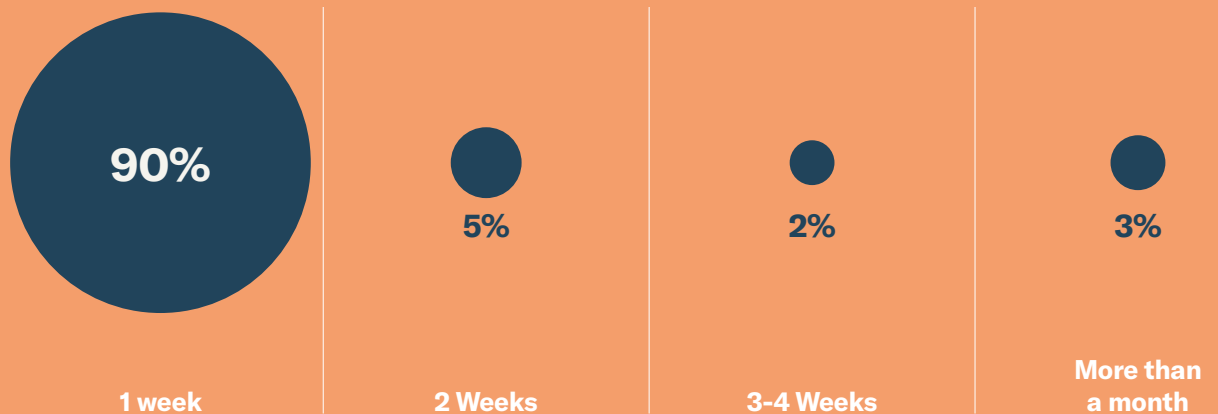
Incoming Business Traffic Arrivals per Geographical Region



Length of Stay in Greece - Incoming Business Traffic

% Market Share

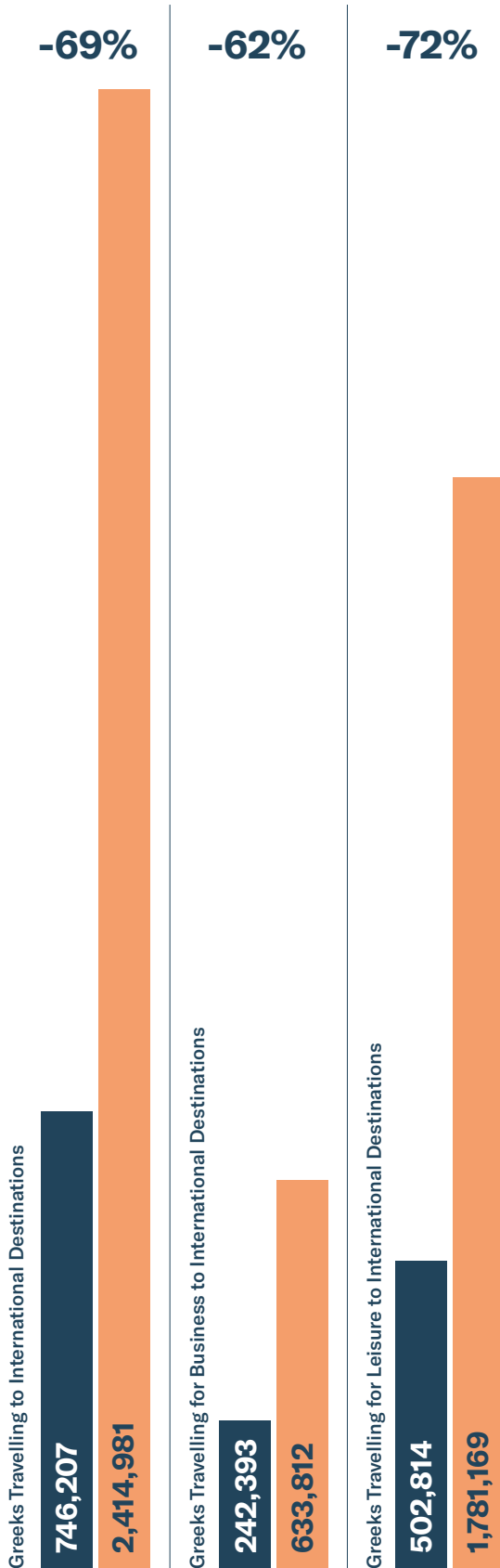
Average days in Greece:
2020: 5
2019: 5



Greek Outgoing Traffic

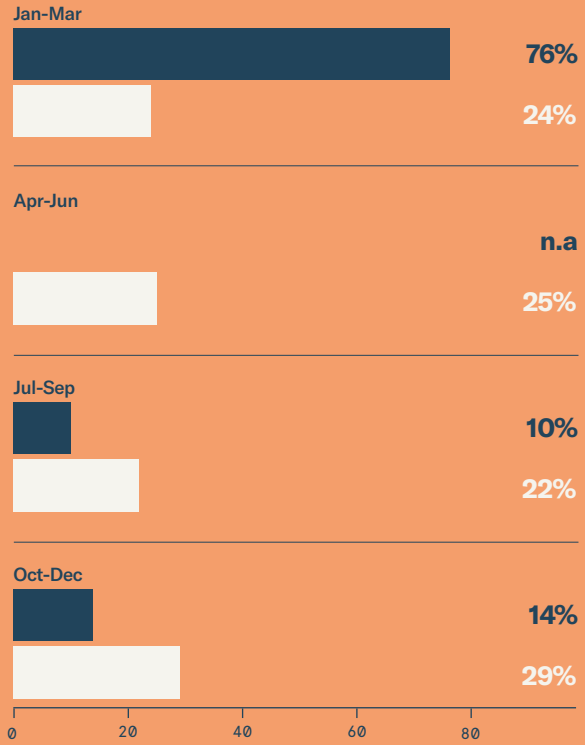
Greek Outgoing Passengers Development

Passengers 2020 ●
Passengers 2019 ●



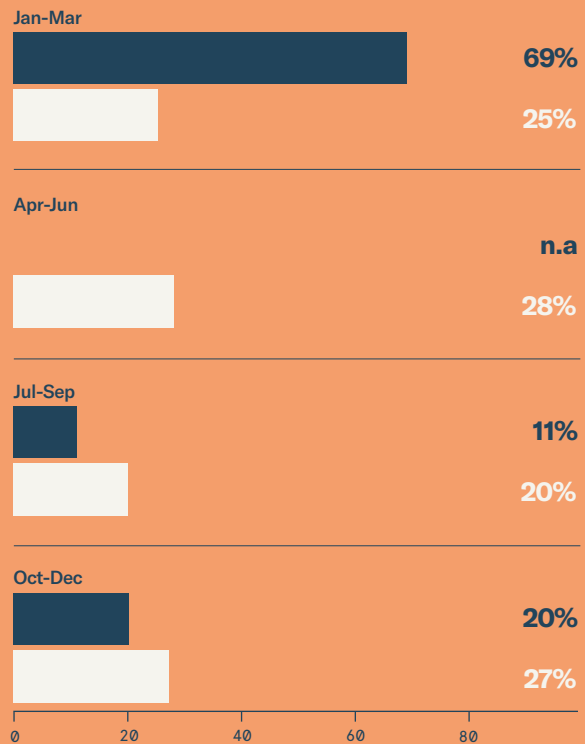
Seasonality of Greek Leisure Traffic Departures

2020 ●
2019 ●
% Market Share

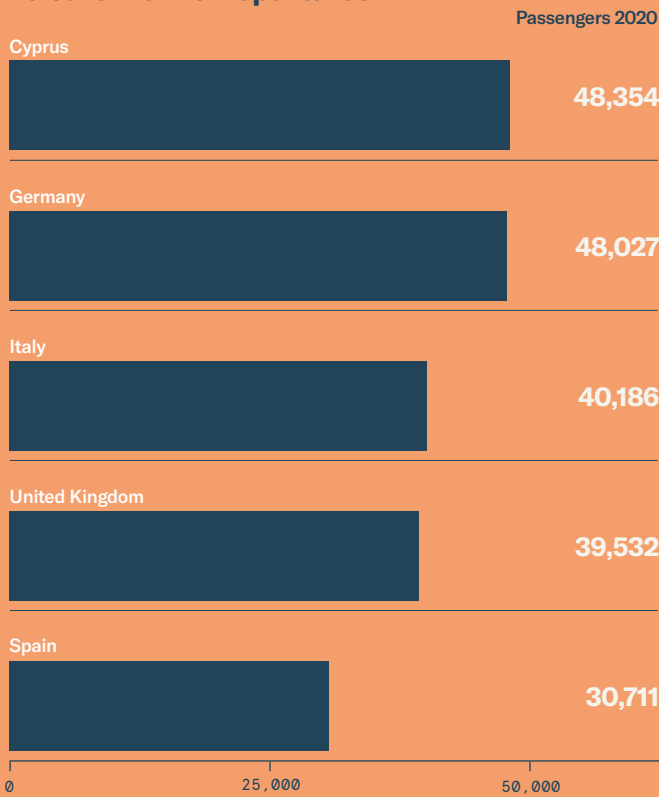


Seasonality of Greek Business Traffic Departures

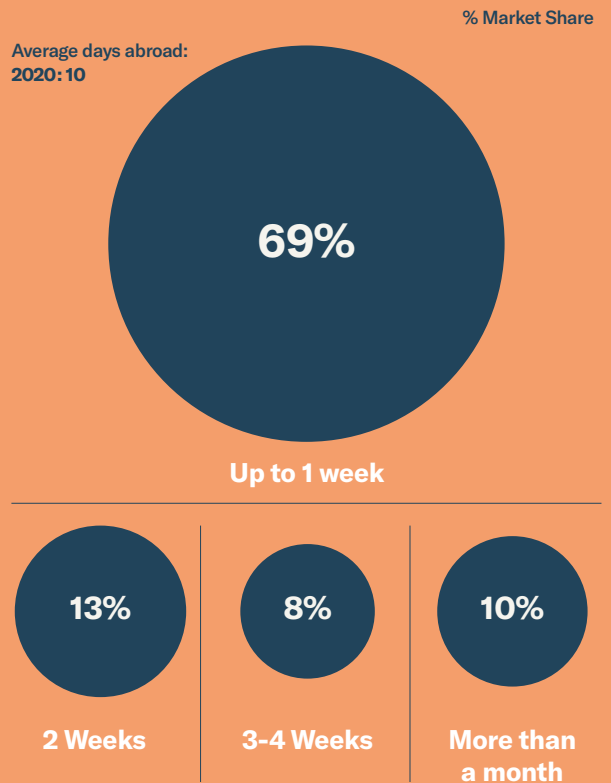
2020 ●
2019 ●
% Market Share



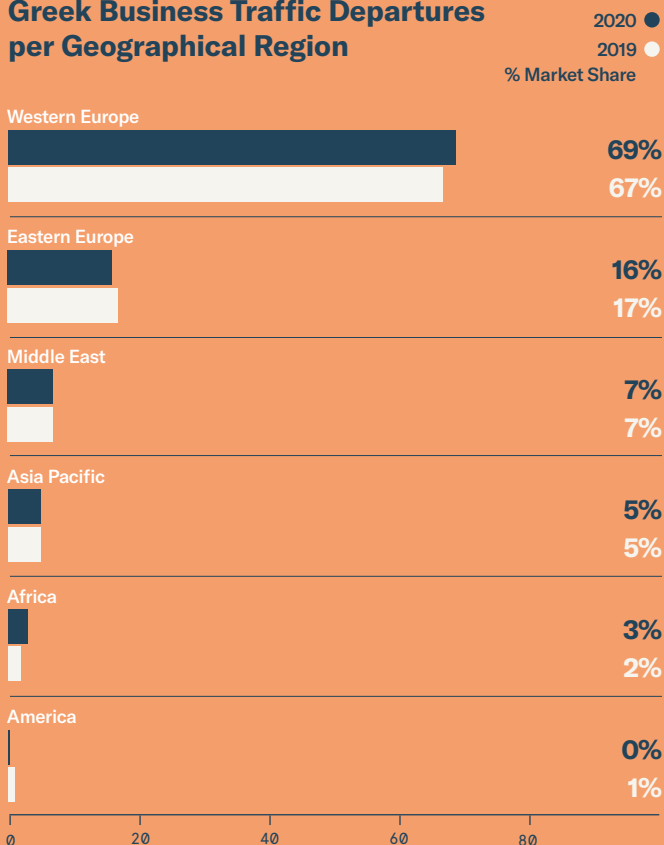
Top Destination Countries of Greek Leisure Traffic Departures



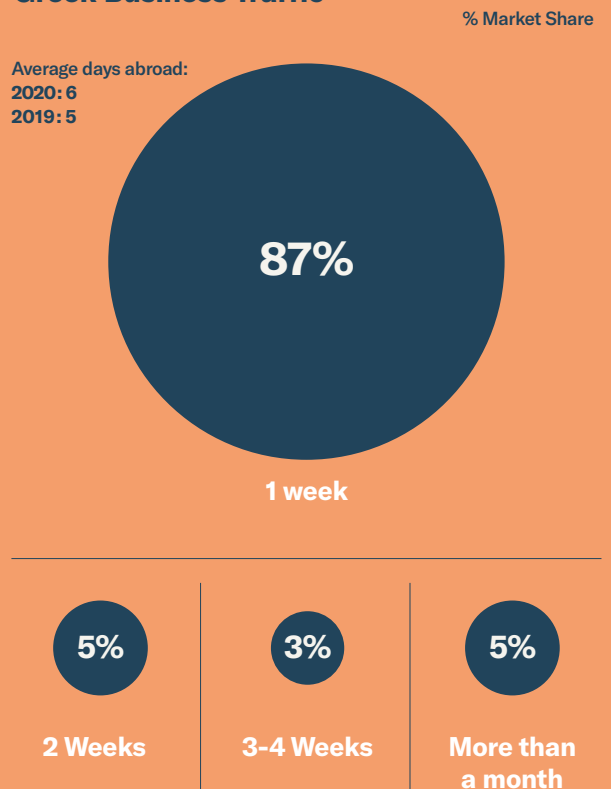
Length of Stay Abroad - Greek Leisure Traffic



Greek Business Traffic Departures per Geographical Region



Length of Stay Abroad - Greek Business Traffic



10

Greek Arithmetic

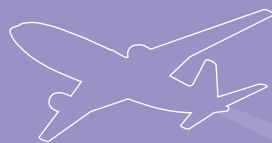
All Greek airports were severely impacted by the pandemic, altogether welcoming less than 20 million passengers (19.7 million), a traffic loss of 69%

All Greek airports were severely impacted by the pandemic, altogether welcoming less than 20 million passengers (19.7 million), a traffic loss of 69%. Domestic traffic stood at approximately 6.9 million, demonstrating a decline of 59.6%. International traffic reached 12.8 million, witnessing an even sharper drop by 72.8%, confirming the industry-wide observation that the pandemic and the erratic and non-coordinated travel restrictions as well as people's consequent reluctance to travel have been more evident in international travel.

Similarly, commercial aircraft movements were also significantly reduced by 53.7% and were formed at about 244 thousand, with domestic flights presenting a 41.6% decline, while the international operations decline amounted to 61.5%. It is worth noting that the decline of the supply was smaller than that of demand, indicating the airlines' efforts to maintain services, while passengers' unwillingness or inability to travel resulted in very low load factors.

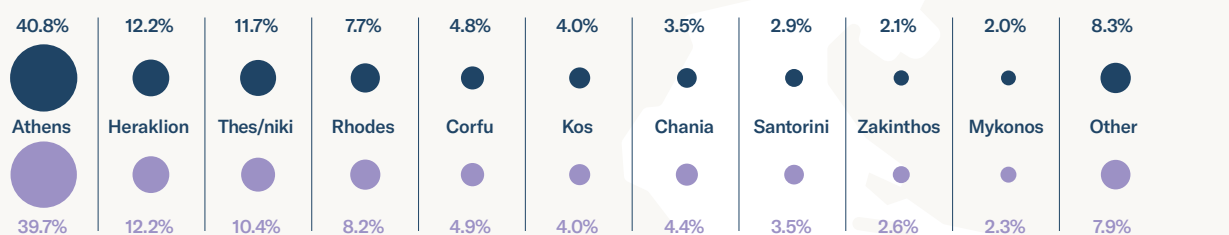
Looking into the extent the pandemic impacted the main peripheral Greek airports, it is noted that all major airports experienced a similar decline. However, it is worth mentioning that Thessaloniki was the less impacted airport (-65.5% vs 2019), due to the considerable domestic traffic it attracted and the fact that it was the first peripheral airport to/from which international operations were permitted on 25th May 2020. On the other hand, Chania was the most affected airport (-75.5% vs 2019), witnessing the sharpest decline in international passenger traffic (-81.5% vs 2019).

Under these unprecedented circumstances in the Greek aviation industry in 2020, Athens International Airport accounted for almost 41% of Greece's total passenger traffic and 44% of the country's aircraft movements.

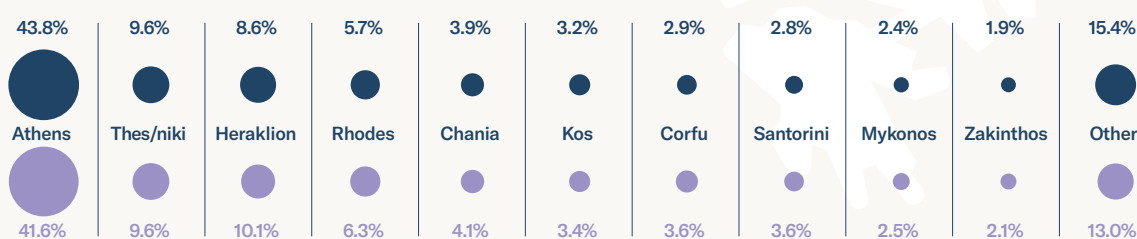


Top 10 Greek Airports According to:

Total Passenger Traffic



Total Aircraft Movements



Passenger Traffic of Main Greek Airports (Commercial Passengers)

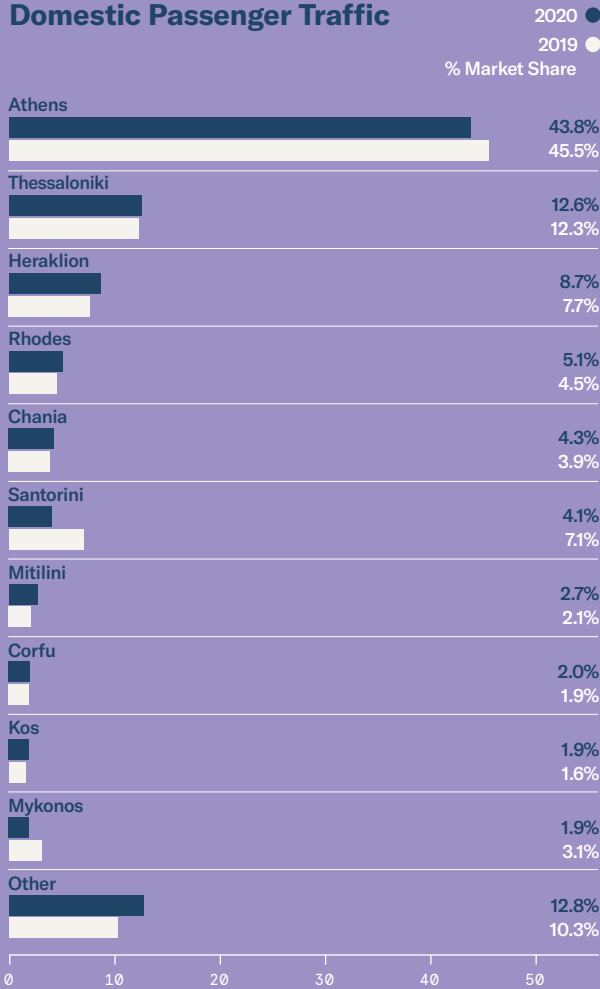
City	Domestic		International		Total	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
Athens	3,006,771	-61.1%	5,020,602	-71.7%	8,027,373	-68.5%
Heraklion	600,388	-54.3%	1,797,876	-72.4%	2,398,264	-69.3%
Thessaloniki	862,799	-58.6%	1,439,817	-68.6%	2,302,616	-65.5%
Rhodes	350,653	-54.5%	1,170,674	-73.9%	1,521,327	-71.1%
Corfu	139,774	-57.2%	810,079	-70.9%	949,853	-69.5%
Kos	133,416	-51.8%	646,354	-71.5%	779,770	-69.4%
Chania	294,438	-55.7%	402,110	-81.5%	696,548	-75.5%
Santorini	282,719	-76.6%	280,664	-72.1%	563,383	-74.6%
Zakinthos	26,850	-39.1%	394,715	-76.0%	421,565	-75.1%
Mykonos	131,187	-74.8%	264,879	-71.5%	396,066	-72.7%
Other GR airports	1,041,201	-49.5%	600,347	-80.1%	1,641,548	-67.7%
Total Greece	6,870,196	-59.6%	12,828,117	-72.8%	19,698,313	-69.3%

Aircraft Movements of Main Greek Airports (Commercial Aircraft Movements)

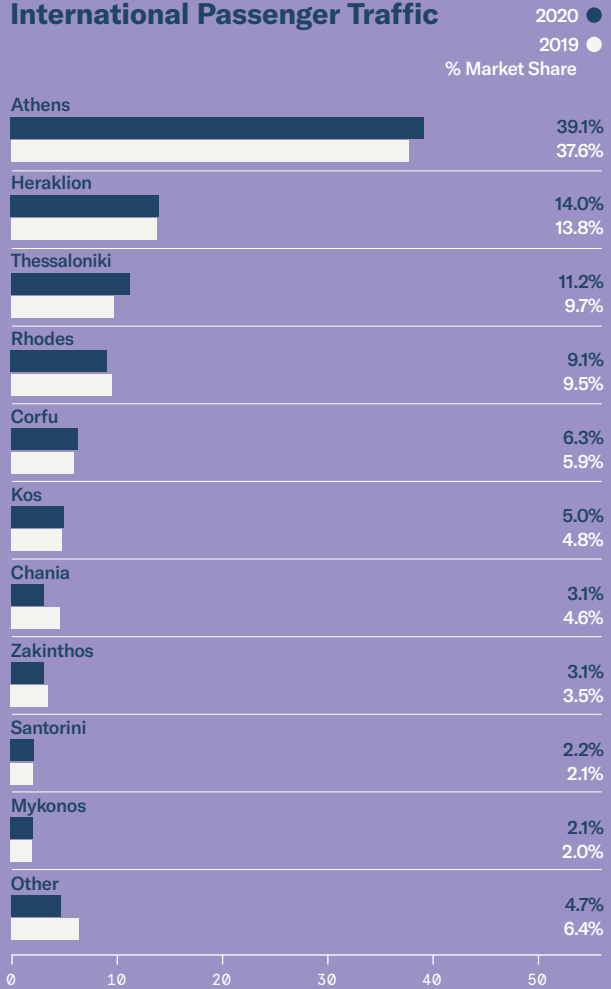
City	Domestic		International		Total	
	2020	%2020/2019	2020	%2020/2019	2020	%2020/2019
Athens	50,095	-45.6%	56,625	-55.3%	106,720	-51.2%
Thessaloniki	10,275	-43.8%	13,217	-59.3%	23,492	-53.7%
Heraklion	6,979	-40.9%	13,897	-66.3%	20,876	-60.6%
Rhodes	4,876	-22.8%	9,047	-66.6%	13,923	-58.3%
Corfu	2,578	-27.3%	6,954	-61.4%	9,532	-55.8%
Kos	2,736	-31.5%	4,972	-64.5%	7,708	-57.2%
Chania	3,491	-40.6%	3,534	-72.9%	7,025	-62.9%
Santorini	4,151	-65.6%	2,569	-63.8%	6,720	-64.9%
Mykonos	2,672	-53.2%	3,112	-59.3%	5,784	-56.7%
Zakinthos	1,201	30.7%	3,373	-66.7%	4,574	-58.6%
Other GR airports	31,484	-31.1%	5,937	-73.8%	37,421	-45.3%
Total Greece	120,538	-41.6%	123,237	-61.5%	243,775	-53.7%

Top 10 Greek Airports According to:

Domestic Passenger Traffic

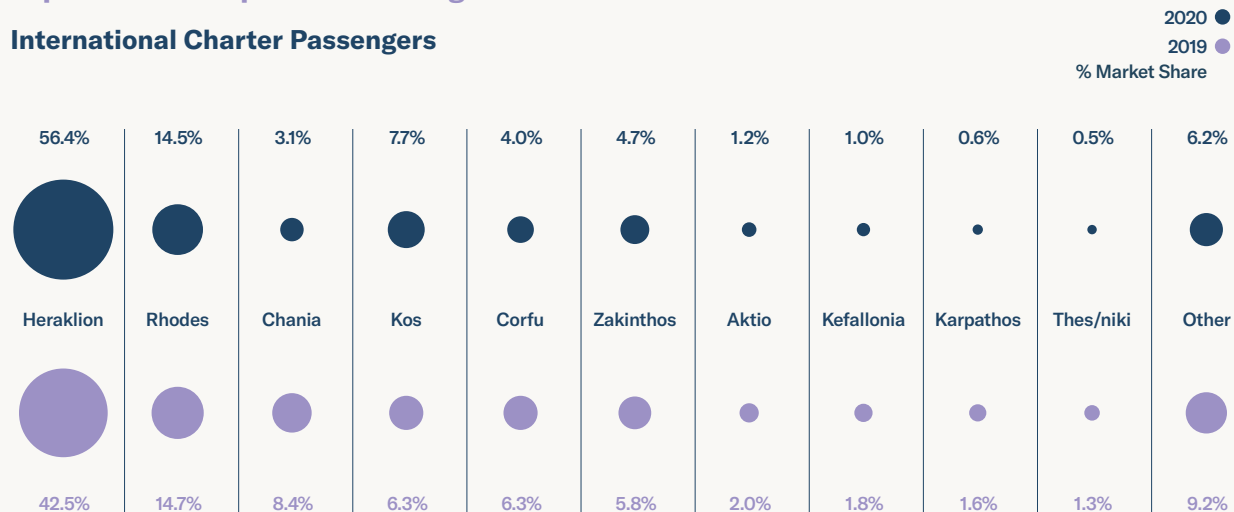


International Passenger Traffic



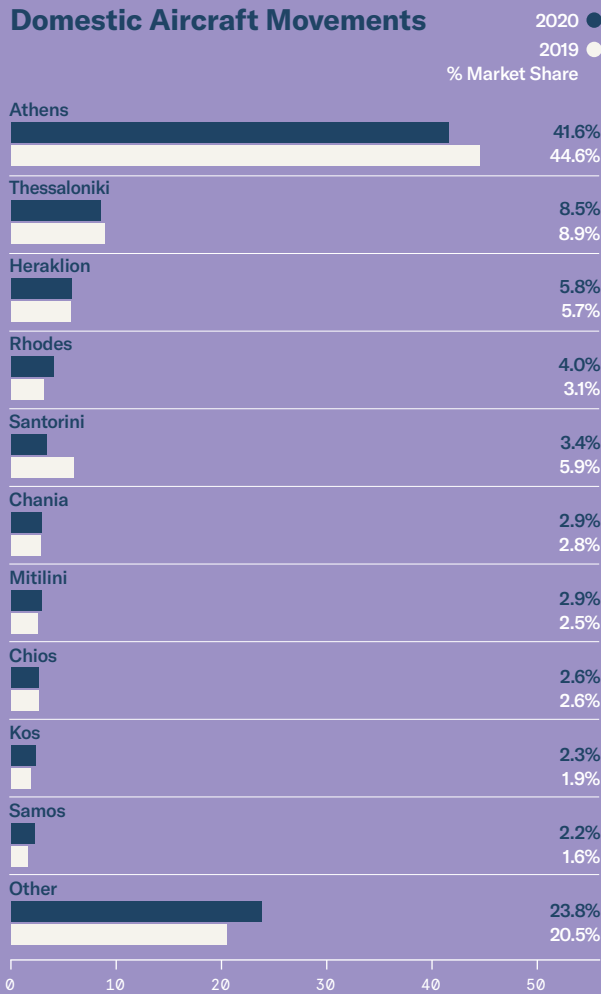
Top 10 Greek Airports According to:

International Charter Passengers

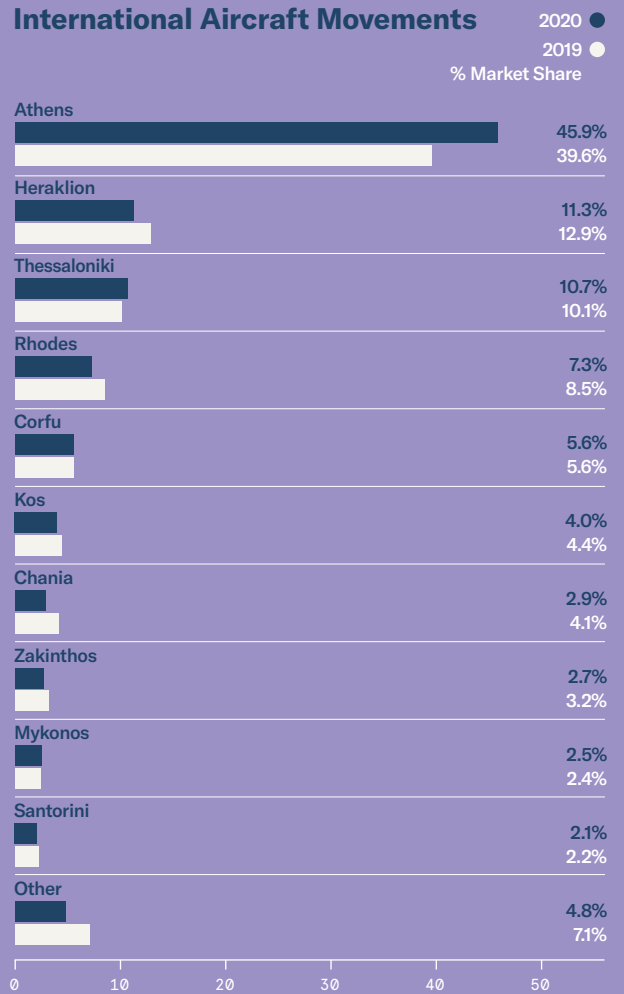


Top 10 Greek Airports According to:

Domestic Aircraft Movements

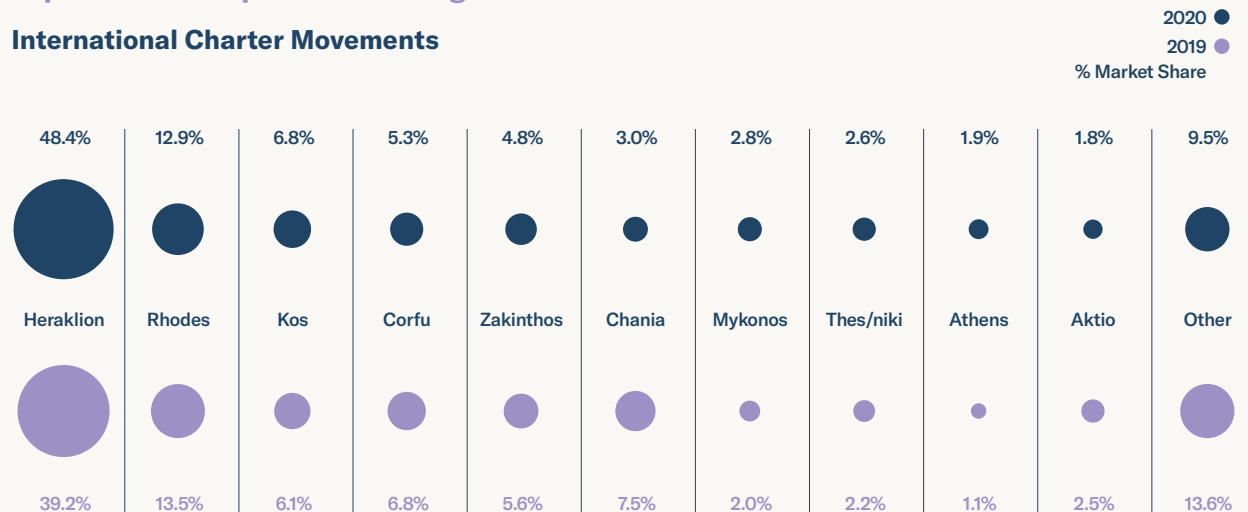


International Aircraft Movements



Top 10 Greek Airports According to:

International Charter Movements



1
1

Europe Plus the World

The global aviation industry was severely hit by the Covid-19 pandemic, experiencing by far the sharpest traffic decline in aviation history

The global aviation industry was severely hit by the Covid-19 pandemic, driven by a combination of non-coordinated national and international travelling bans, airlines limiting or ceasing operations, state-imposed restrictions on numerous business activities, depressed travel confidence and more. IATA characterised 2020 as the worst year in history for Air Travel Demand, with global passenger demand (RPKs) falling by 65.9% compared to 2019, by far the sharpest traffic decline in aviation history. Lower by 75.6% compared to 2019, international demand was hit harder than domestic demand, which experienced a 48.8% decline.

According to Airport Council International's (ACI) preliminary results, global passenger traffic went down by 63.7% in 2020, while aircraft movements were less by 43%. Europe and the Middle East were hit the hardest in passenger demand (-70% and -69%, respectively). In comparison, America and Asia/Pacific (with -61% and -60% respectively) were the most resilient regions, a performance largely attributed to those regions' higher dependency on domestic traffic. Since the pandemic did not directly affect goods' transportation, cargo volumes witnessed a milder decline of not more than 9%. What's more, cargo traffic in North America even demonstrated a slight increase (approximately 2%).

European airports altogether lost 1.72 billion passengers in 2020, a year-on-year decrease of approximately 70% , with EU airports being significantly more affected than non-EU ones (-73.0% vs -61.9%), as a result of their size, the relative resilience of the domestic markets in Russia and Turkey, and the somewhat more loose travel restrictions in the non-EU market.

Moscow and Istanbul airports climbed up in the top-10 European airports in passenger traffic, experiencing a relatively lower decline than the rest. Istanbul ranked first in passengers and second in flights, behind Amsterdam, which retained its top position. Regarding cargo traffic, it is noteworthy that several major airports witnessed a considerable increase, with Liege even enjoying a 23% growth.

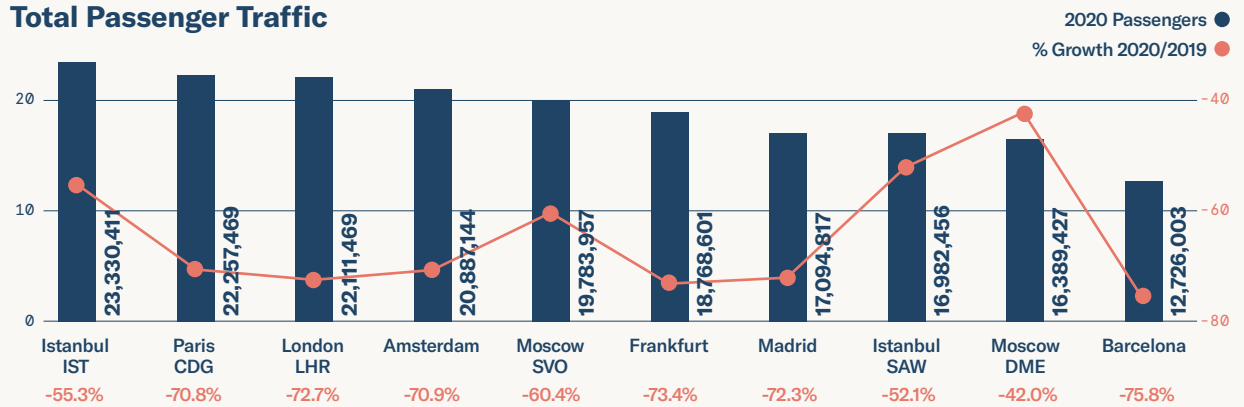
Regarding traffic development at major European airports (above 10mppa in 2019), Athens International Airport experienced a milder decline in passenger and flight traffic than the European average, partly supported by the considerable share of domestic traffic.

Worldwide Traffic Development By Geographical Region

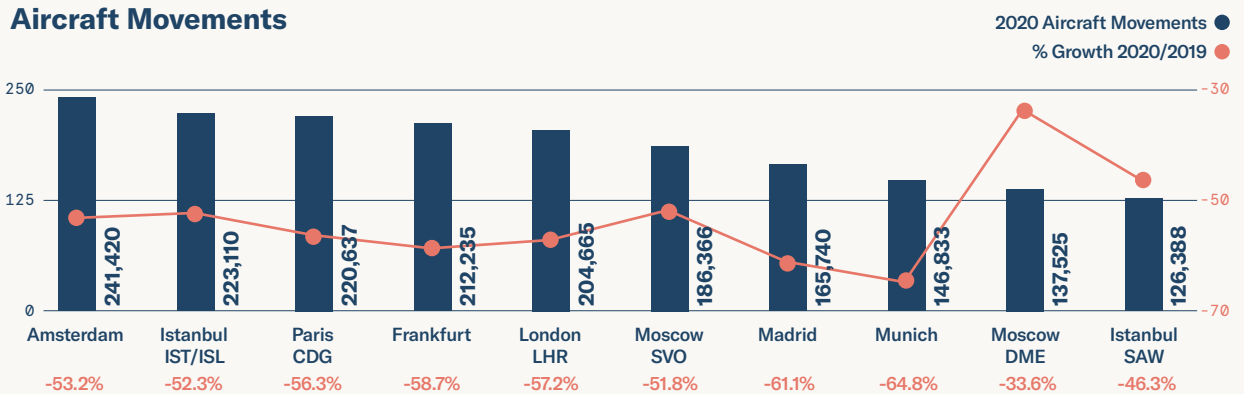
Region	Total 2020 Passenger Traffic	% 2020 / 2019	Total 2020 Cargo (tonnes)	% 2020 / 2019	Total 2020 Aircraft Movements	% 2020 / 2019	Number of airports
Africa	67,315,247	-65.6%	1,684,674	-21.3%	1,263,578	-52.3%	134
Asia/Pacific	898,751,995	-59.8%	33,635,304	-12.3%	8,769,704	-44.3%	184
Europe	711,331,528	-69.7%	18,218,091	-11.2%	10,755,409	-51.2%	493
Latin America/Caribbean	229,610,100	-59.2%	4,018,013	-17.8%	3,100,914	-47.6%	167
Middle East	102,502,327	-68.6%	6,389,896	-21.6%	1,105,425	-50.5%	22
North America	730,603,379	-61.3%	33,048,591	1.8%	17,782,861	-33.0%	158
ACI Total	2,740,114,576	-63.7%	96,994,569	-8.9%	42,777,891	-43.0%	1,158

Top 10 European Airports According to:

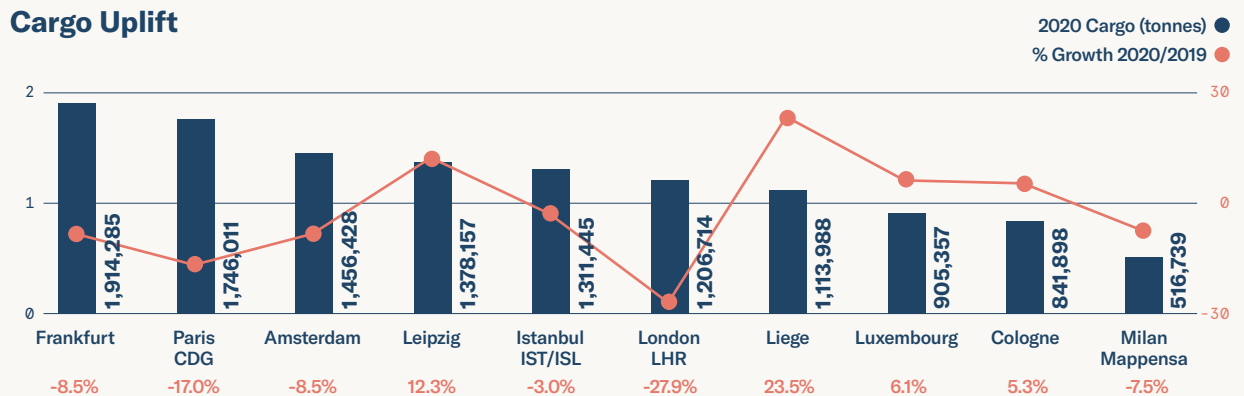
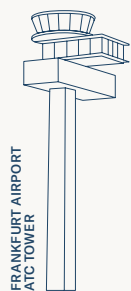
Total Passenger Traffic



Aircraft Movements



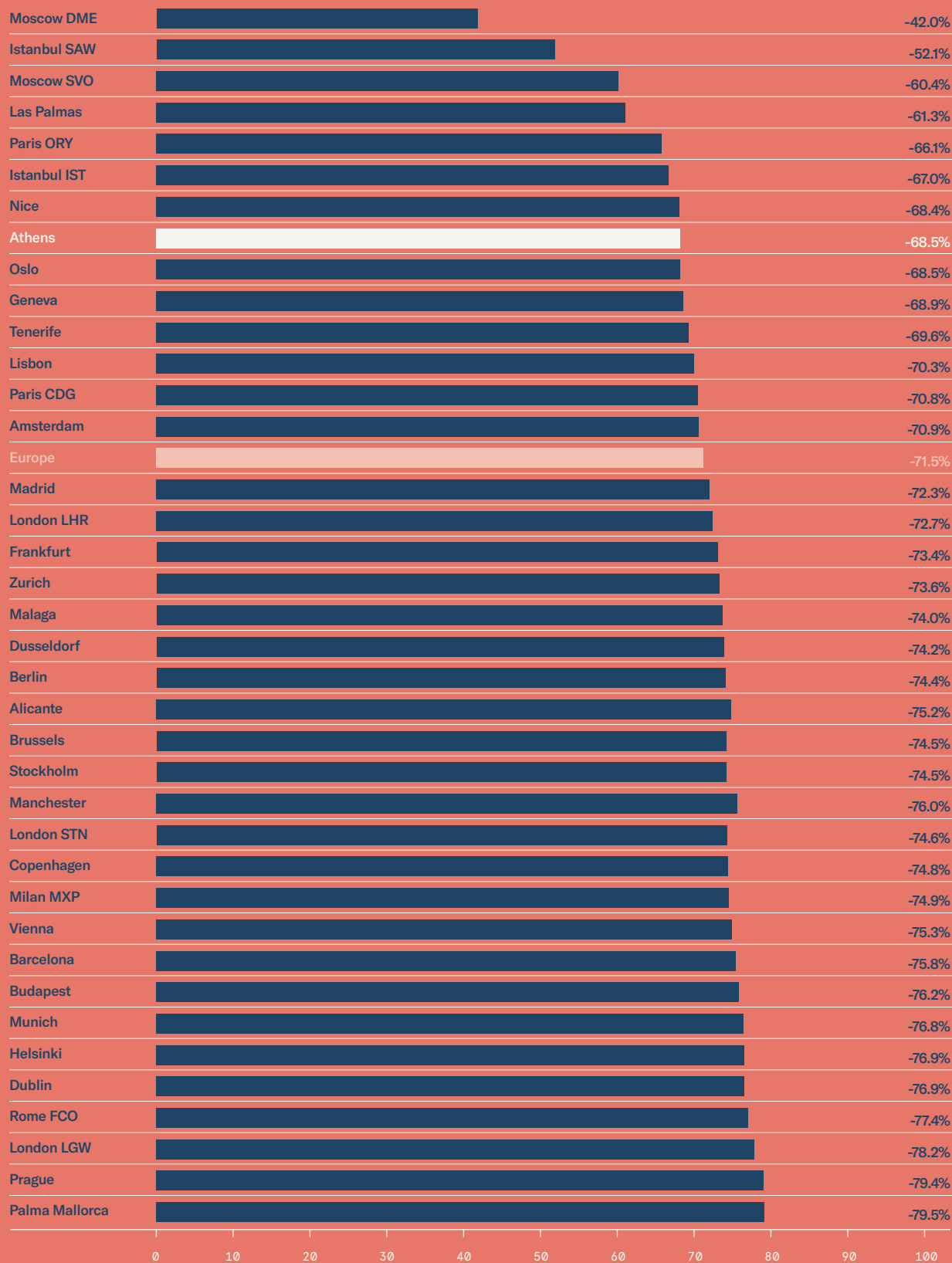
Cargo Uplift



Major European Airports (>10 Mio Pax In 2019)

Commercial Passenger Traffic Development 2020

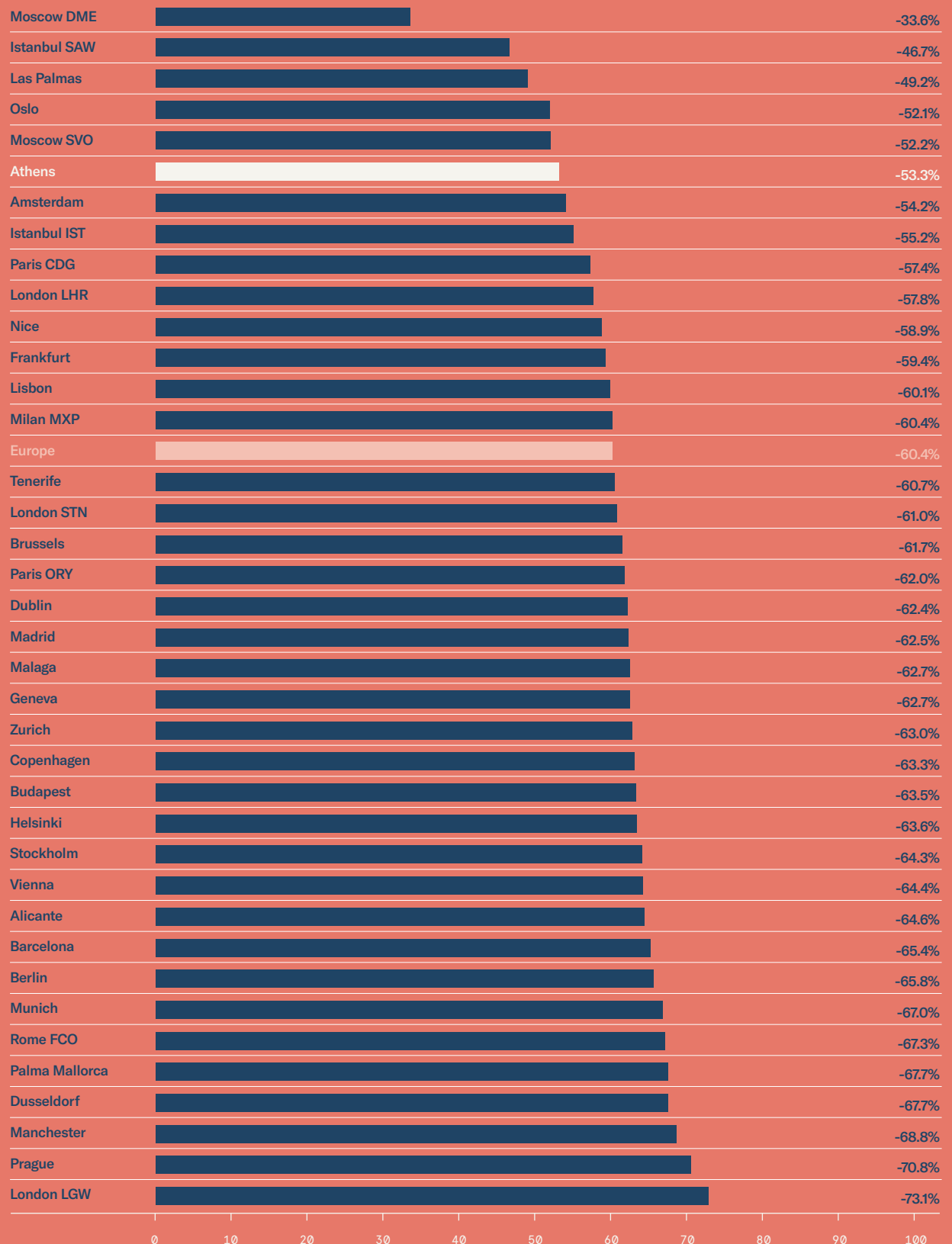
% Growth 2020/2019 ●



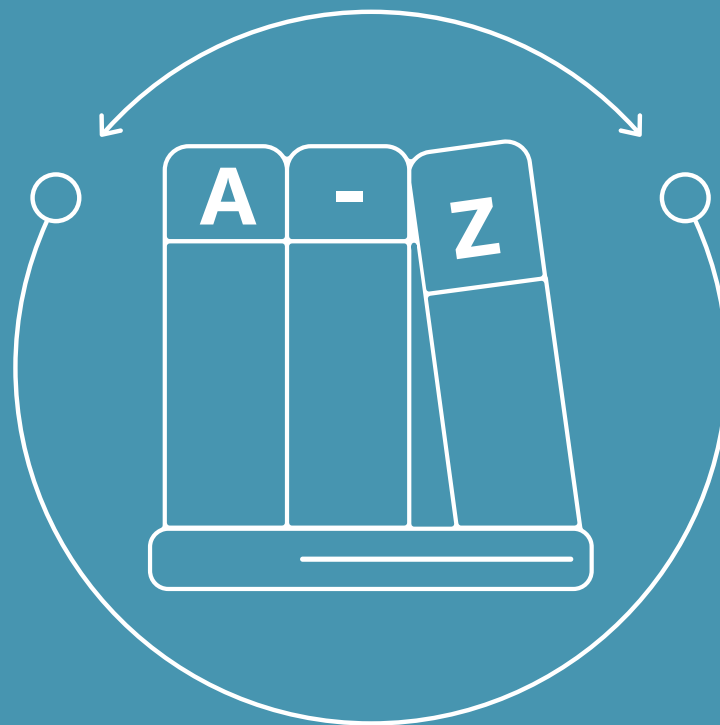
Major European Airports (>10 Mio Pax In 2019)

Commercial Aircraft Movements Development 2020

% Growth 2020/2019 ●



Air Vocabulary



Passenger and Flight Statistics

- The origin and destination of a flight are defined according to the flight's first origin/last destination.
- A passenger's origin/destination is defined according to the point of embarkation/disembarkation.
- Classification into Intra/Extra-Schengen for passengers and flights is designated according to the flight's last origin/first stop.
- Geographical regions are defined per the ACI classification.
- Transit Passengers are defined as passengers arriving to and departing from the airport with the same flight number without leaving the airport's transit area (direct transit).
- Terminal Passengers are arriving and departing passengers, transit passengers excluded.
- All statistical traffic data are measured in UTC and Land/Airborne times.
- Traffic data for the peripheral Greek airports are based on the preliminary traffic results of the Hellenic Civil Aviation Authority (HCAA). The total number of Greece's domestic flights and passengers is double-counted (included in both the airport of origin and the destination airport).
- Traffic statistics on worldwide and European airports are per ACI preliminary traffic results, based on data provided by more than 1,000 airports around the globe. Charts on major European airports' traffic are based on ACI's rapid data exchange programme.

Exercises on Punctuality

- A flight is characterised as Delayed if it departs/arrives (off-/on- blocks) 16 or more minutes after the scheduled time of departure/arrival.
- The Average Delay is calculated in minutes and amongst delayed flights.
- Delay reasons are classified according to IATA Delay Codes, as declared by the airlines and/or handling agents. It should be noted that statistics presented in this report should be treated with caution due to the limited number of delayed flights for which a delay reason is declared.

Joining the Passenger Dots – Adding Tourists

- Passenger profile and tourism development data derive from the "Passengers' Survey",

which Athens International Airport conducts as of 2001, aiming to investigate Athens passengers' demographic and travelling profile and pinpoint changes over the years. The survey's annual sample consists of 40,000 interviews of departing passengers taken at the airport's departure gates daily. Due to the pandemic, the data collection ceased from April to June and restarted in July 2020 but with a smaller sample.

- Passenger volumes presented in the "Adding Tourists" chapter correspond to passenger arrivals for foreign residents and passenger departures for Greek residents.

Our Grade Report

- Service Performance relates to:
 - Capturing passengers/visitors' perception of the level of services offered (passenger comment management process);
 - Measuring actual performance in critical areas (service performance indicators).
- Service Performance indicators reflect those areas of service and facilities that affect a passenger's perception of the service level within the airport premises.
- Thus, quantifiable indicators have been established and monitored for several services offered by either the Airport Company or a third party (airlines/handlers), in line with AIA's Corporate Quality programme. These indicators enable an accurate monitoring of the service level, support benchmarking and allow initiatives to improve performance. Evaluating passenger-oriented services rendered by AIA or third parties is possible through the productive cooperation of the Company's departments.

Check-in and Security Queues

- Queuing time refers to the time elapsing from the moment a passenger stands in line until they reach the service point. Measurements are taken seven days a week between 06:00 and 22:00 hours.

Baggage Reclaim

- Measuring time between aircraft on-blocks until first bag delivery (Obl-Fb) and between first-bag delivery until last-bag delivery (Fb-Lb) is a standard method among international airports for assessing baggage reclaim performance and approximates the level of service provided.

Info Desk

- Although the info-desk queries indicator is not a measure of service performance, it does connote the effect passenger traffic has on the information counters.

Call Centre

- AIA's call centre statistics are produced by the Report Manager, who provides historical statistical reporting and information on all contact centre activities. These statistics can be retrieved in ten seconds intervals. Service level is also provided, i.e. the percentage of incoming service calls answered by the service group within a specified time, representing how well the contact centre performs. The specified time for AIA's service level is set at 20 seconds, which is the time between the end of the introductory message and the agent's response.

Passenger Complaints

- In compliance with article 10 of the ACI-Europe Airport Voluntary Commitment, Athens International Airport has established an integrated Passenger Complaint Management System.

Airport Services Questionnaire – Rating

- AIA's brochure titled "Your Opinion Counts" features a questionnaire that passengers can use to evaluate the airport's services and facilities. It covers 20 general service categories and passengers rate out of five. In 2020, 134 passengers filled in the questionnaire.

Additional Sources of Information

- Information regarding the impact of Covid-19 upon the travel industry and propensity to travel derive from AIA's online survey on social media and the corporate website. The survey commenced in June 2020 and was answered by 1.906 people by the end of the year.
- The scope of the InfluencAIRs programme is to form a group of people who love to travel by plane and research into their stance towards the pandemic and travelling. Athens International Airport (AIA) involves InfluencAIRs in various quantitative and qualitative research activities aiming at formulating the "new traveller" profile.

