INSETE INTELLIGENCE

travelsat

ATHENS/GREECE SENTIMENT TRACKER/ 2022 Q2 Report

TCI Research
Travel Competitive Intelligence

UNWTO
Innovation Award

Ευρωπαϊκή Ένωση
Ευρωπαϊκό Ταμείο Περιφερειακής Ανάπτυξης

ΔΗΜΟΣ ΑΘΗΝΑΙΩΝ

ΑΘΗΝΑ

ΠΕΡΙΦΕΡΕΙΑΚΟ ΕΠΙΧΕΙΡΗΣΙΑΚΟ ΠΡΟΓΡΑΜΜΑ ΑΤΤΙΚΗΣ

ΕΣΠΑ 2014-2020

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Travelsat Sentiment Methodology

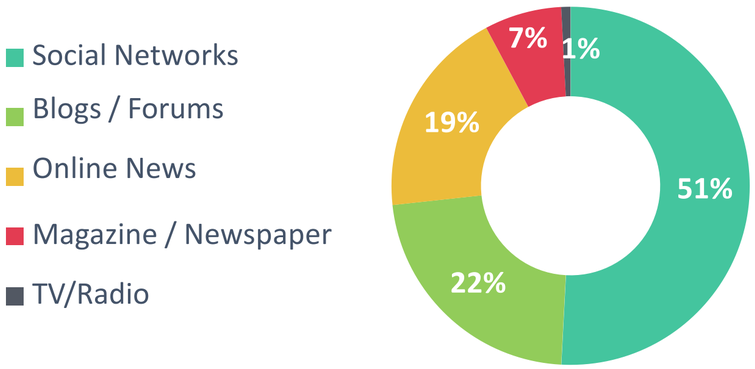
TRAVELSAT© Sentiment Methodology

Social Data and Visitor Reviews Monitoring for a holistic Reputation Tracking

Destination E-reputation "At large"

SOCIAL WEB SENTIMENT TRACKING

- The "**sentiment**" reflects the **state and dynamic of travel brands' e-reputation** as expressed in **global web social conversations "at large".**
- Shared by **medias, consumers, companies, citizens, brands and officials** on websites, forums, blogs & social networks.
- Sentiment is not predictive of travelers' planning, but **a positive e-reputation is essential to generate favorability towards destinations** and travel brands, particularly in post-crisis management context.
- In the past 12 months, **Greece was mentioned 950K+ in social conversations** in a context of travel, generating 10,7M engagements, shared by **200K+ unique authors** from **200+ countries.**



Destination E-reputation driven by experience

DESTINATION REVIEWS SENTIMENT TRACKING

- **Data Type**: visitors reviews. Destination reputation is massively driven by visitors sharing their experiences, fueling the experience-based image of Athens and Greece.
- **Data Sources listened**: 25+ Travel Reviews Websites and OTA platforms
- **Data Scope**: reputation data consolidated from 800 Hotels, Attractions/Sites and Restaurants in Greece.
- **Structured rating** and **reviews' sentiment/comments** are tracked and analyzed.
- About **800 000 reviews about Greek tourism experiences** / year

Booking.com · Google · Expedia · yelp · Ctrip · tripadvisor · Hotels.com Le choix évident · travelocity · zoover avis de voyageurs

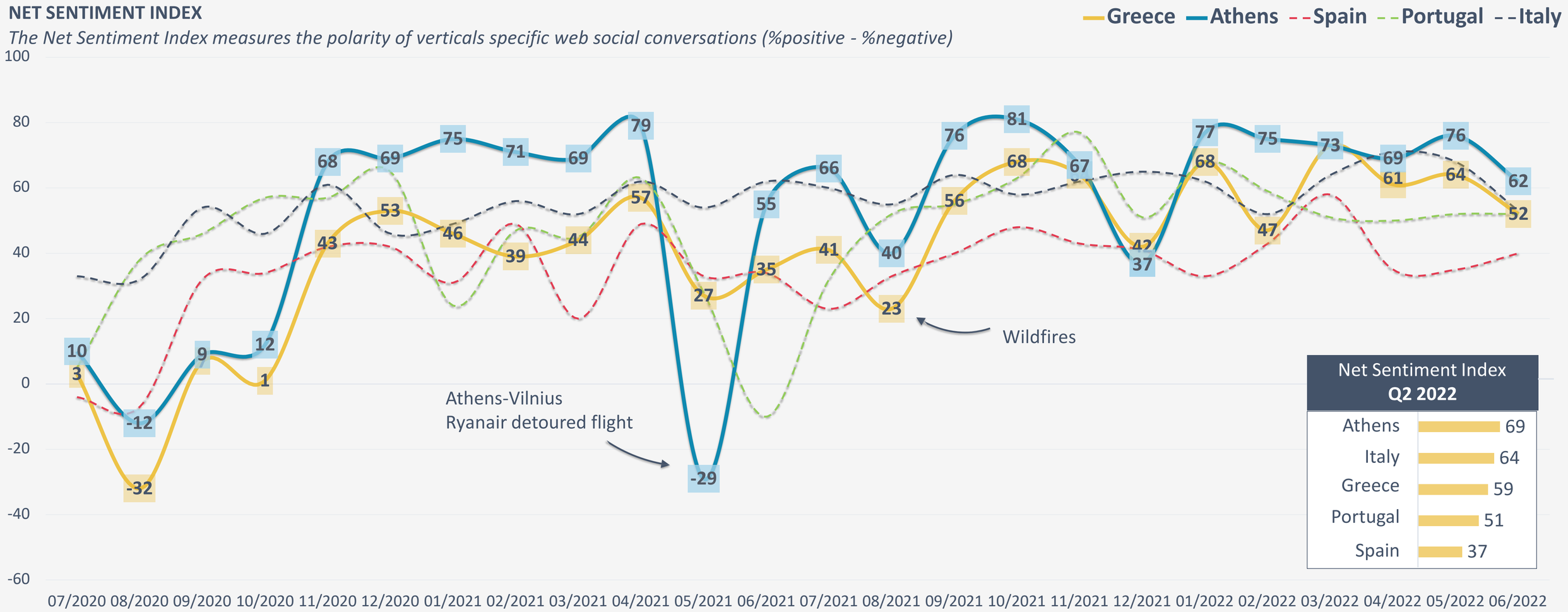
Key Sentiment Indexes

Destination e-Reputation - Net Sentiment Index

Benchmark Evolutions

NET SENTIMENT INDEX

The Net Sentiment Index measures the polarity of verticals specific web social conversations (%positive - %negative)



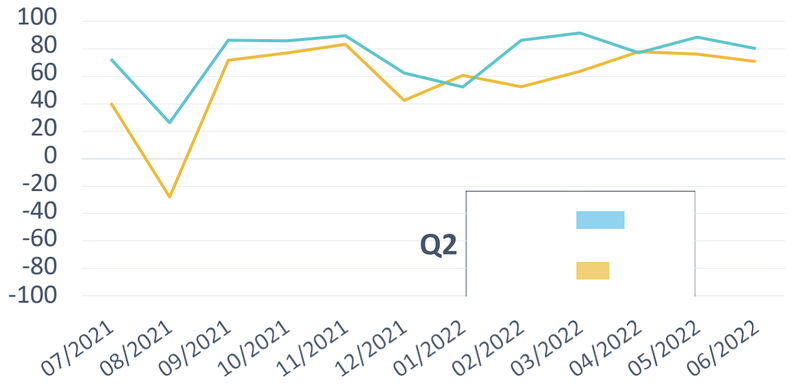
Destination Sentiment per Market

What tonality of conversations in Athens' key markets?

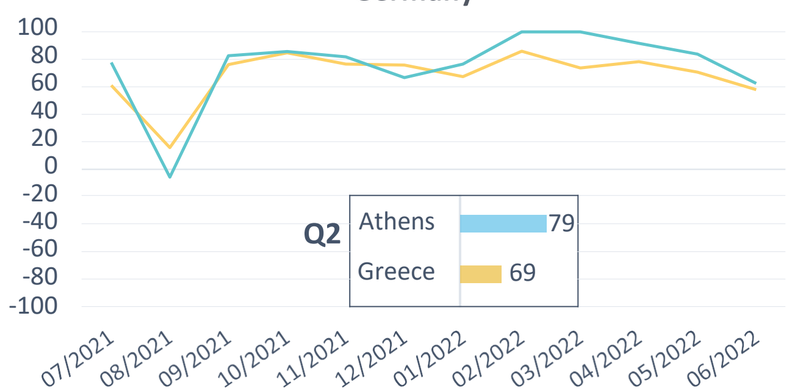
NET SENTIMENT INDEX — Greece — Athens

The Net Sentiment Index measures the polarity of verticals specific web social conversations (%positive - %negative)

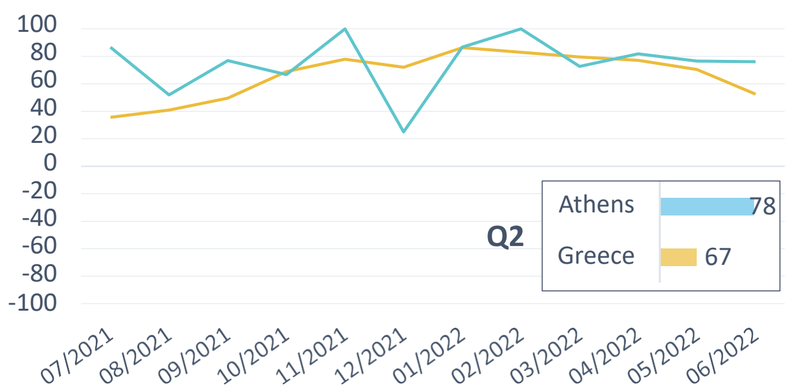
France



Germany

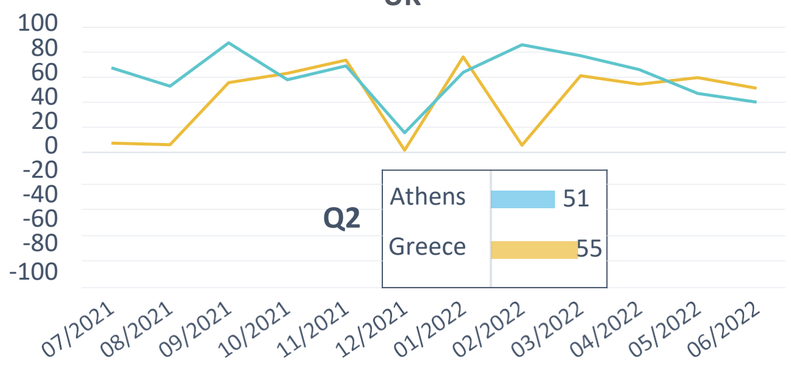


Netherlands

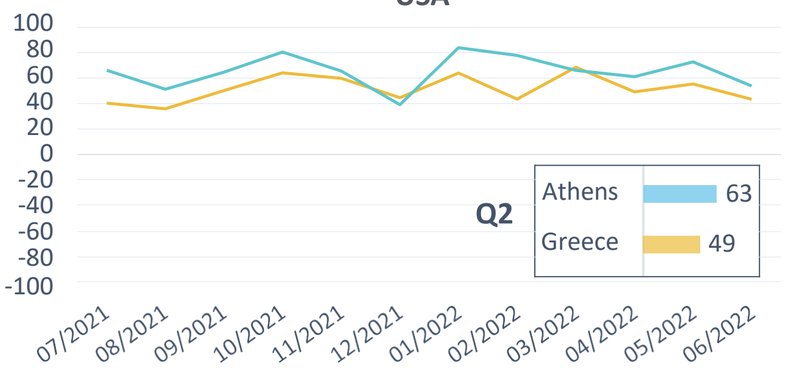


Italy

UK



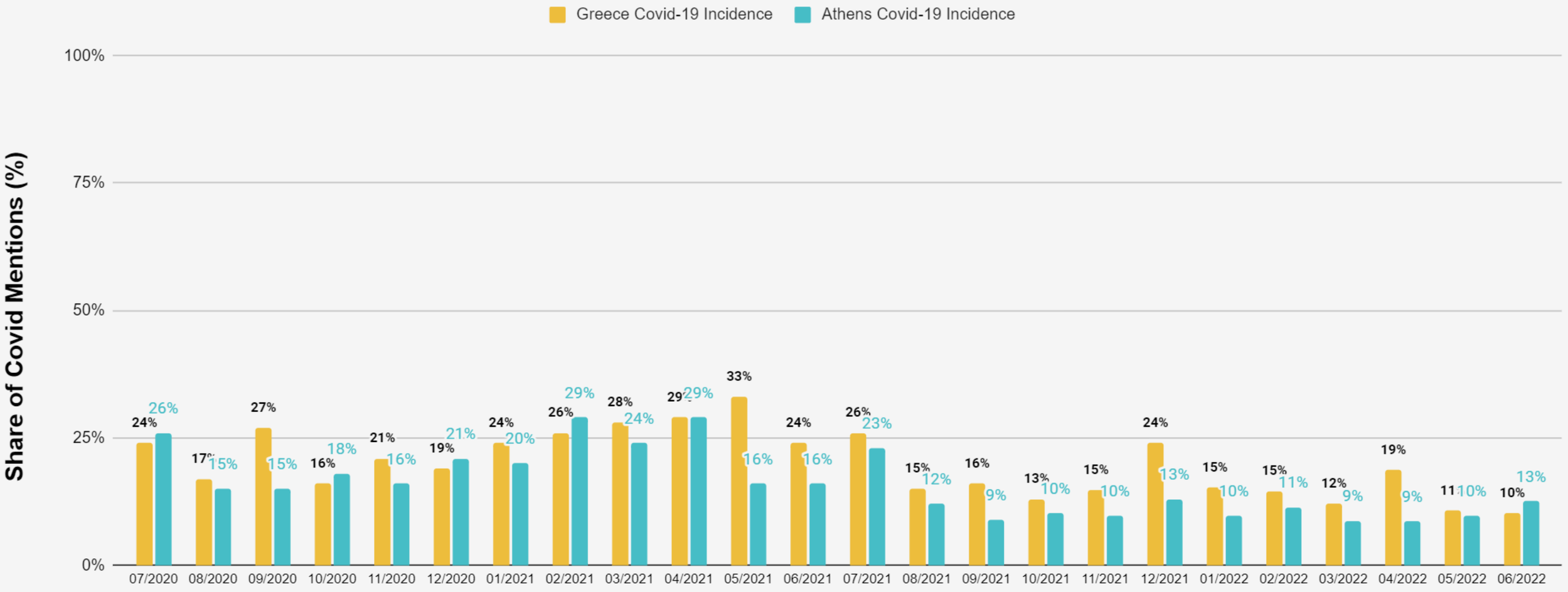
USA



INSETE INTELLIGENCE

Destination Sentiment

What impact of Covid/Pandemic in the destinations' conversations?



2nd Quarter 2022

INSETE INTELLIGENCE

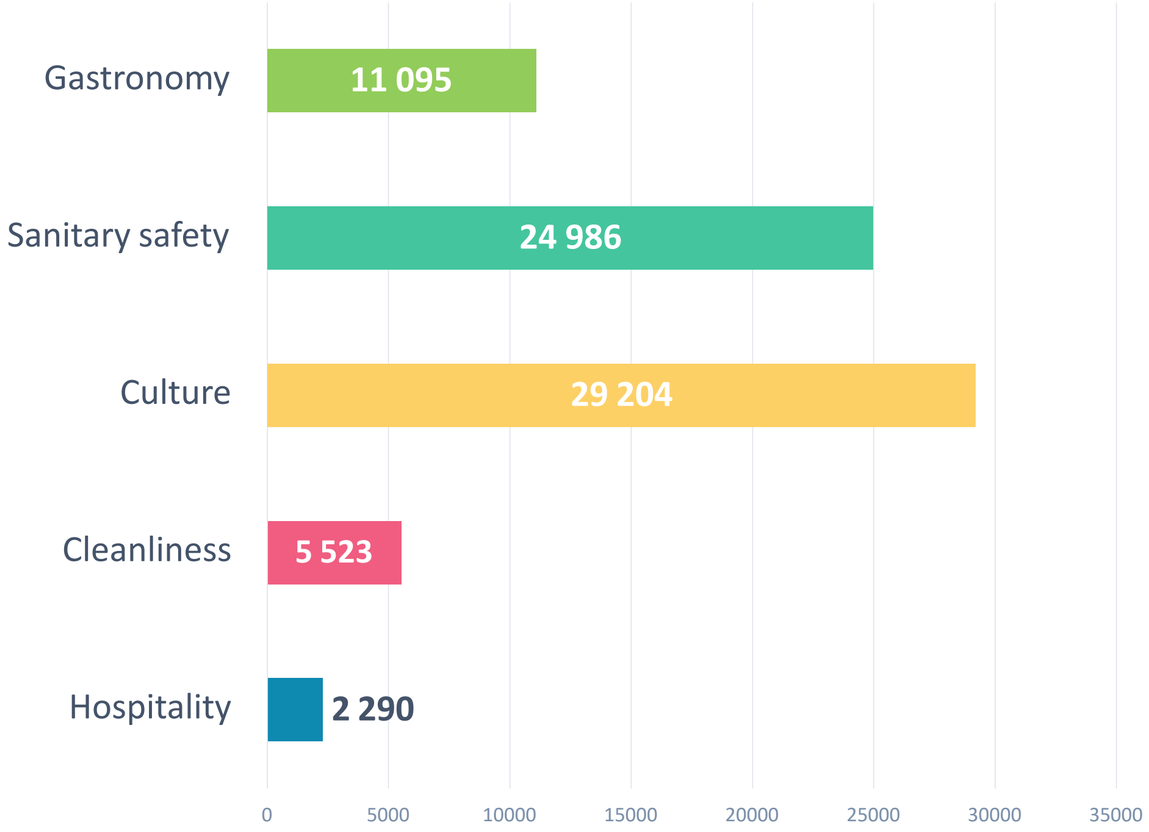
Focus on specific reputation topics

GREECE

In the second quarter, conversation volume increased in all major tourism themes, indicating a travel appetite for the summer after two years restrictions. Sentiment polarity remained high for gastronomy, culture and hospitality while the opposite trend was observed for topics related to environment. Conversations related to Ukraine conflict dropped to 3 % of the total.

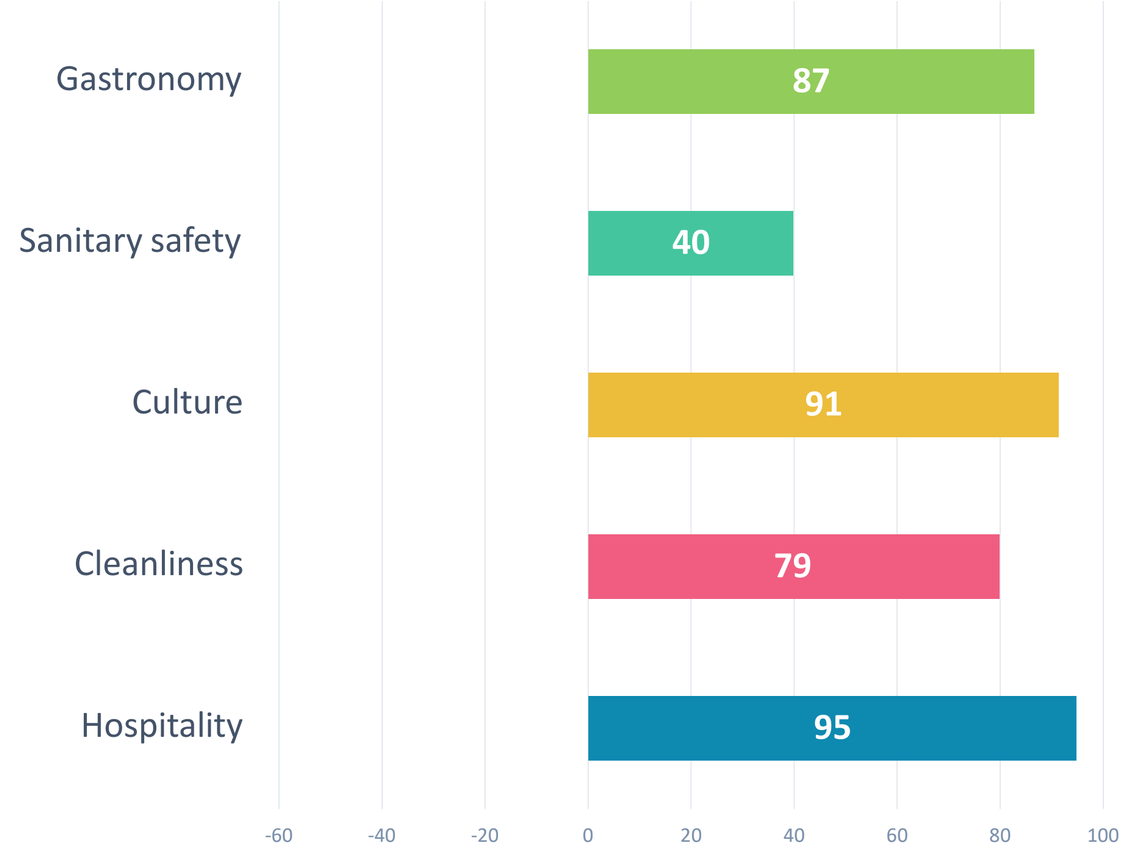
VOLUME OF CONVERSATIONS – APR./JUNE 2022

Intensity of web social conversations



NET SENTIMENT INDEX – APR./JUNE 2022

Polarity of verticals specific web social conversations (%positive - %negative)

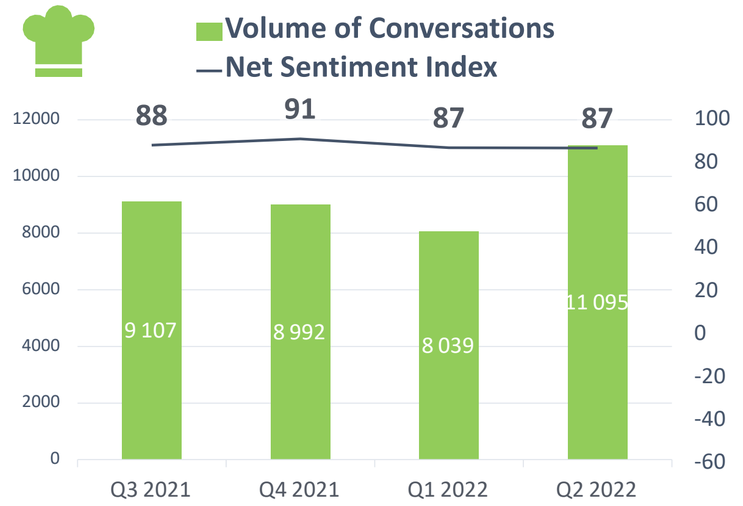


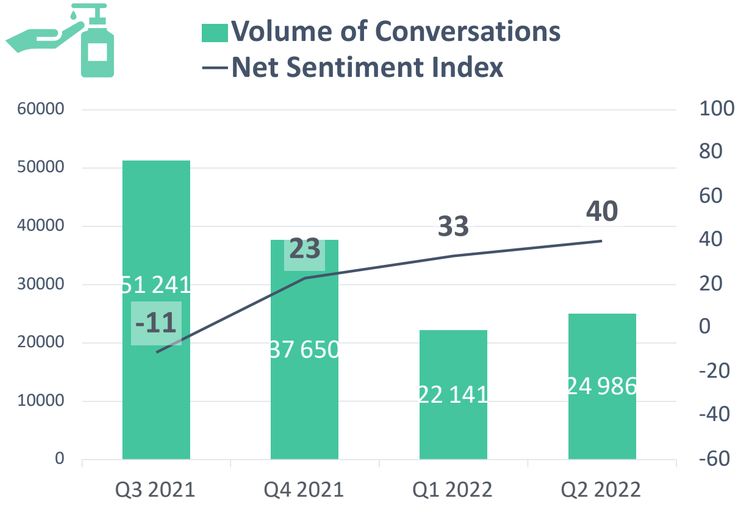
2nd Quarter 2022

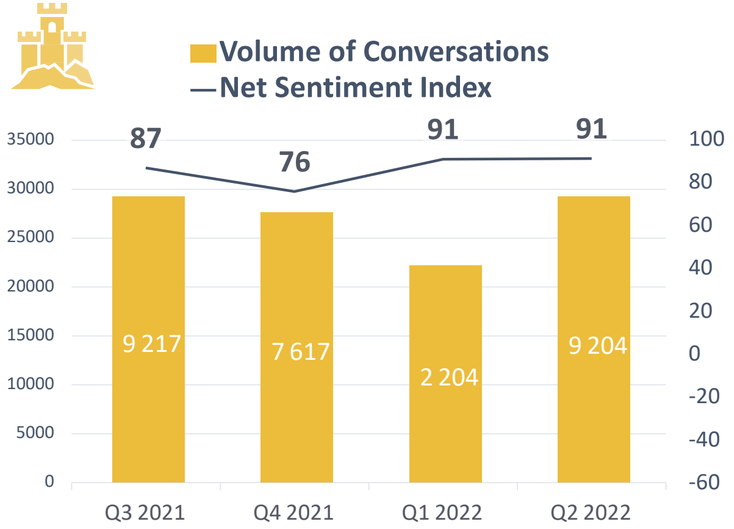
INSETE INTELLIGENCE

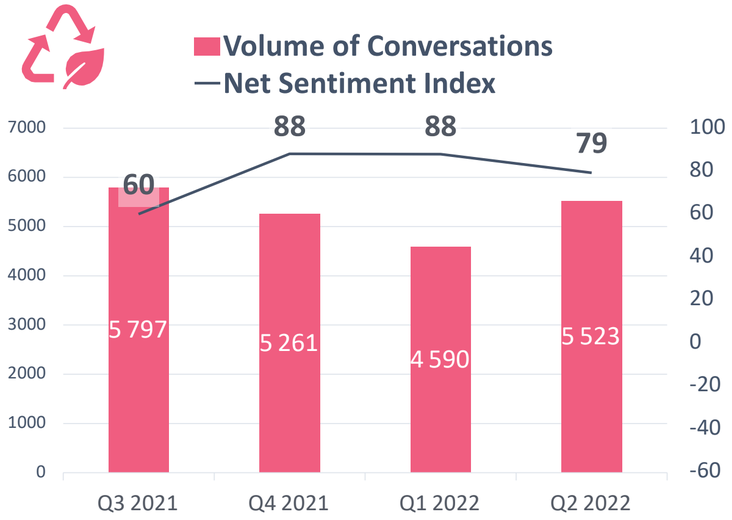
Reputation Topics – Annual Trends

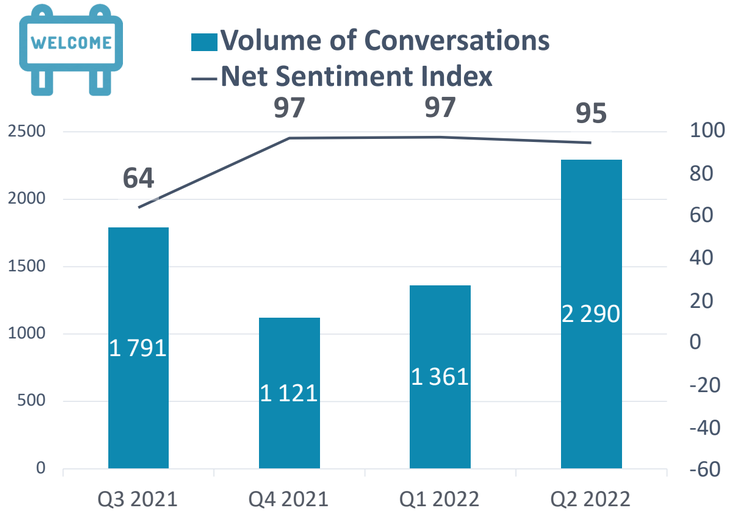
GREECE











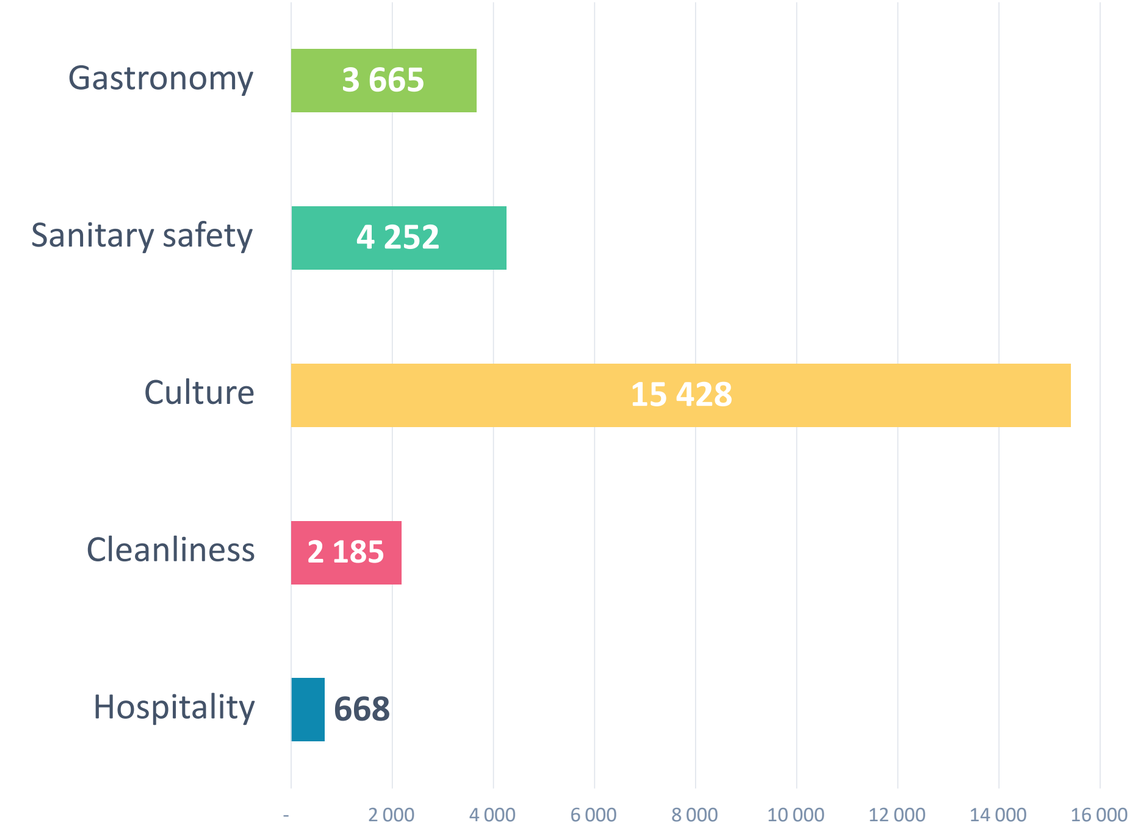
ATHENS

Focus on specific reputation topics

Athens' conversation volume boosted in all major tourism themes. Compared to Greece as a whole, Athens shows higher sentiment scores in Gastronomy, Sanitary Safety, and Culture topics. Sanitary Safety sentiment recovered significantly in the second quarter.

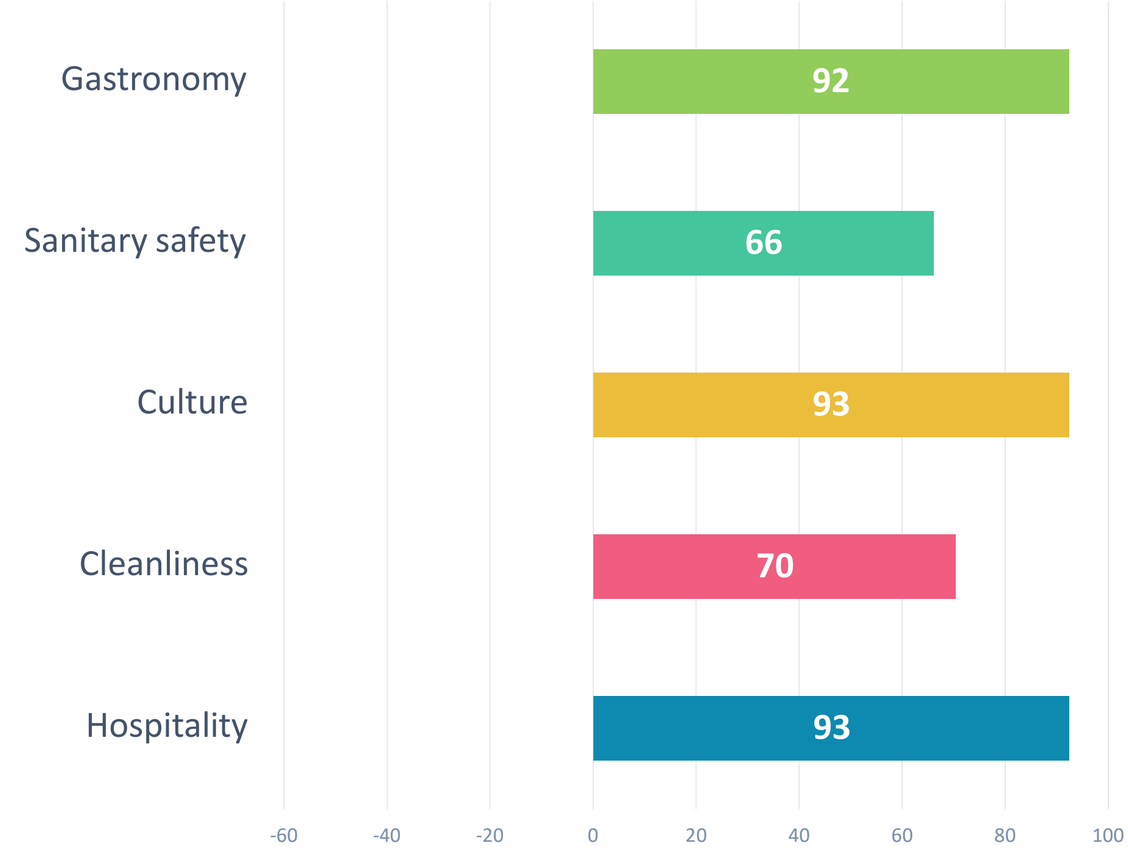
VOLUME OF CONVERSATIONS – APR./JUNE 2022

Intensity of web social conversations



NET SENTIMENT INDEX – APR./JUNE 2022

Polarity of verticals specific web social conversations (%positive - %negative)

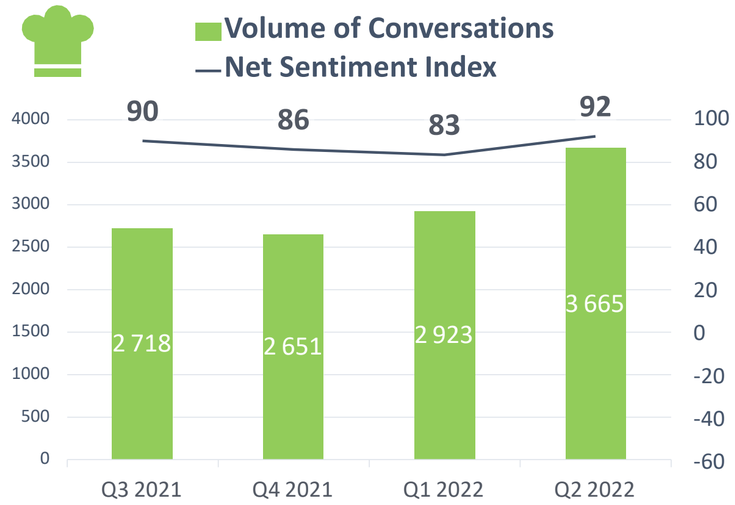


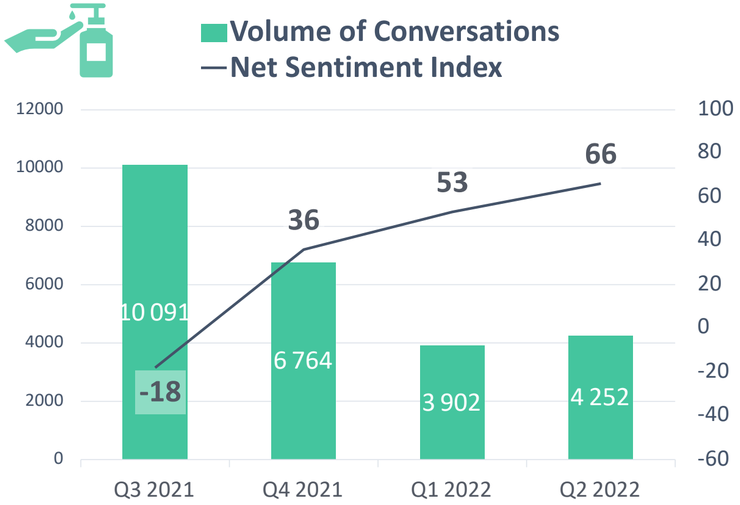
2nd Quarter 2022

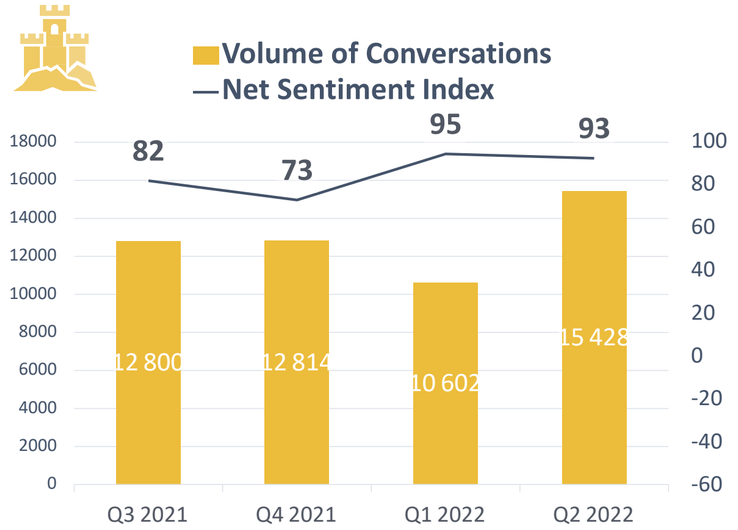
INSETE INTELLIGENCE

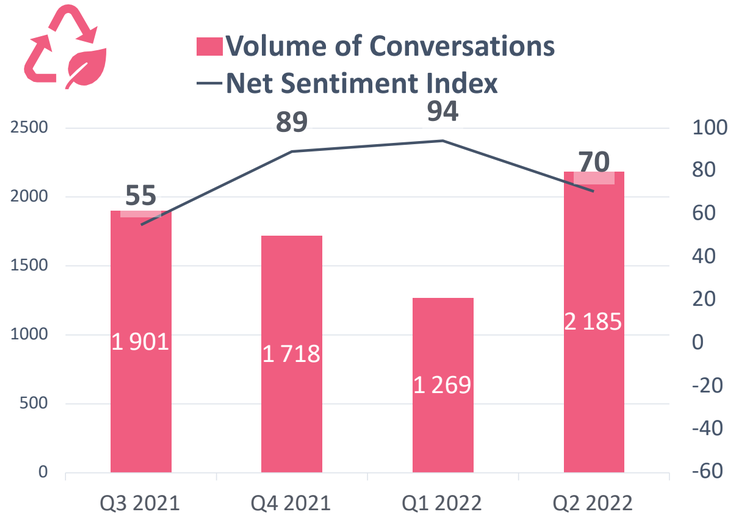
ATHENS

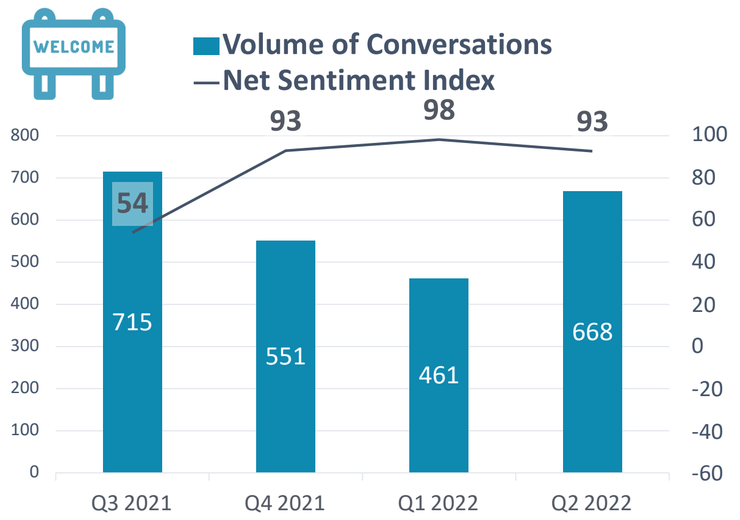
Reputation Topics – Annual Trends











INSETE INTELLIGENCE

Positive Sentiment Drivers (1/2)

Fueling the destination’s social reputation in the period

A wide variety of themes related to culture, nature, food, and lodging are shared in this quarter, illustrating the multifaceted feature of Greece including mainstream/iconic and hidden gems. Conversations about lodging were prominent in Q2, in the prospect of the summer season.

Examples of reputation drivers…

- New **UNESCO Global GeoPark** in Greece
- Two hotels in Greece named among the "**Best New Hotels in the World 2022**"
- Appreciating Greek archeological treasure in **archaeological safari**
- **Seabourn** is ready for summer (voyages between Athens and Istanbul, Venice and Athens)
- Visiting the **antique Olympic Stadium** in Athens an audio guide to learn about **the history**
- Enjoy strolling in the peaceful and pleasant atmosphere of the **Mani Peninsula** (discovering neoclassical houses, finding orange trees…)
- A release of **commemorative series of stamps** featuring the **Parthenon Marbles**
- Highlight of **Greek home cooking** prepared by a Greek housewife
- Visiting the harbor **at sunset** for stunning pictures
- **InterContinental** plans to open a resort in Crete
- **Football players** spending their summer in Greece
- Exploring **a small bay area in Greece** (Fishermen’s houses, cliffs, boats…)
- **Diversity of accommodation** in Greece (modern design hotels, adorable cottages, family-friendly resorts, adults-only wellness suites…)
- **Yacht trip in Athens**
- **Vegan cheese brand** in Greece launched **dairy-free dips**
- **Heraklion** ranked among best destinations for **family-friendly activities**
- the 50th anniversary of **diplomatic ties** between Greece and the People's Republic of China (Greek is looking forward to welcoming Chinese tourists)
- Highlight of Athens **architecture** and **arts** (art districts, experience centre, digital arts, street arts and umbrella street…)
- **Aegina**, a Greek island , is evolving into **a year-round tourist destination**

Positive Sentiment Drivers (2/2)

Fueling the destination’s social reputation in the period

The diversity of “ambassador” profiles was also great, from art to sport and royal celebrities! The concept of water in various forms (beaches, baths, boats…) was also very active in social conversations mirroring a typical pre-summer sentiment.

Examples of reputation drivers…

- the U.S. CDC lifted Greece from the **COVID 'Do Not Travel' recommendation** lists
- inspiring **travel diaries** and **travel photos** : sunset views and crystal-clear waters from several islands (e.g. Santorini, Anafi, Naxos, Evia, Polyaigos…)
- Highlight of **Pozar thermal baths** and **waterfalls**
- **Windmill hotels** and **Nafplion** called “the most romantic city of all Greece”
- **Sustainability-centric suggestions** (multi-day bicycle journey, island-hop in a wind powered sailboat…)
- How **the Royal family** is spending the Holy week during **the Easter**
- **Peloponeso beach** selected as the best beach in Europe
- Greece also appears as the **#1 European destination** for **retirement**
- **Tripodon Street** and the **Lighthouse Athens** as one of the city’s hottest hangouts for the fashionable modern traveler
- **Dolphin watching with a biologist**
- **Santorini** is recommended for **honeymooners** for the shining white houses by the blue Aegean Sea
- The story of **Greece’s shipwreck beach** (Navagio)
- Introduction of **archeological wonders** (the monastery of Meteora…)
- “**A Taste of Greek Summer**”, a book published by an UK author
- **Musical artists** Macroblank made album covers using pictures of **ancient Greek statues**
- Athens was awarded “**The best MICE destination in Europe**”
- The city received a royal visit by **Belgian King** and **Queen**
- A video content about **a cocktail bar** with **live saxophone music,** showing **convivial atmosphere** of Greece at night
- Greece’s **new projects** (construction of Europe's largest coastal park…)

Illustrative Social Posts

Reflecting the Positive Sentiment

UNESCO designates 8 new Global Geoparks

...windmills, bridges and lighthouses, a rich **cultural heritage** scattered over the area's extraordinary geological ... Global Geopark, **Greece** Rebius / Shutterstock.com All right reserved School visit to the **environmental** centre...

published on 13/04/22 at 09:59 | Online News Other | Brazil | www.unesco.org

The Best New Hotels in the World: 2022 It List

...setting, the staff produces **culinary** wonders from the open kitchen, including a **delicious** curried mangrove crab and a ... French **cuisine**. Ixrhotels.com; doubles from $527. —Selena Hoy Six Senses Fort Barwara — Rajasthan, India **Visitors** to this...

published on 12/04/22 at 05:35 | Magazine | United States | www.travelandleisure.com

Archaeological safari in Argolida

...inexhaustible. We organized a spring road **trip** to discover it. The marble inscription of 150 AD. says that, for ... The inscription, in which he describes his entire **journey** , is exhibited in the Archaeological Museum of Epidaurus, is one of the few ...

published on 08/04/22 at 13:26 | Newspaper | Greece | www.kathimerini.gr

Seabourn Ready for 2022 Summer in Eastern Mediterranean

...nearly every turn." The seven-day **voyages** between **Athens** and Istanbul visit some of the most popular destinations in the ... and there are also week-long Holy Land **voyages** between Athens and Haifa (Tel Aviv), the gateway to biblical and historical...

published on 07/04/22 at 17:37 | Online News Other | United States | www.cruiseindustrynews.com

Long weekend in Athens: things to see — Slanelle Style

Slanelle created a post

...know ;) Where and what to **eat** in **Athens** ? In the end, we tested quite a few **food** addresses , because 1) as I was saying...not to **eat** a good grilled fish, octopus or seafood during your stay in **Athens** . The dishes at...

published on 11/04/22 at 17:24 | Blogs | France | slanellestyle.blogspot.com

Athens , its neighborhoods & its street art

clementinehochet created a post

... **Athens** , it was here, among other places, that the main protests against the crisis took place. There is street **art** here ... street **art** makes it a unique and original city. Sometimes violent, sometimes gentle like a summer breeze, **Athens** cannot...

published on 25/04/22 at 09:00 | Blogs | France | mylittlepipedream.com

MAGNE (Greece), a marvel to discover

Virginie created a post

...nicely seaside and **touristy** (but still reasonable): an air of **vacation** not unpleasant at all! Nafplio has ... going from **Athens** to Nafplio, but the place is well worth a few kilometers). The site is truly **spectacular** : the stage in...

published on 31/05/22 at 22:21 | Blogs | France | avec-mes-enfants.fr

Greece Sends Loud Message with 'Reunite Parthenon' Stamp Series

...is also at the core of **Greece**'s request for the repatriation of the ancient **art** works. Earlier this month, UNESCO's ... Committee for Promoting the Return of **Cultural** Property to its Countries of Origin or its Restitution in Case of Illicit...

published on 26/05/22 at 13:48 | Blogs | Greece | news.gtp.gr

Our Greek Odyssey - Chania by Foot

Vix created a post

...in her garden. If you think Greek **food** is amazing - **food** freshly-cooked by a Greek housewife will blow your mind! Our ... Museum, which consistently wins **Trip** Advisor's prestigious **Travellers** Choice Award. Admission is free and the young guide an...

published on 20/05/22 at 17:16 | Blogs | United States | vintagevixon.blogspot.com

3 Nights In Corfu, Greece

Lauren Kenny Blog created a post

...to **travel** and I can't wait to **travel** more whenever I can - it's my favourite thing to do. **Traveling** to Corfu We **traveled** ... **food** I can't even tell you but it was so nice and I couldn't stop **eating** it. For the main (which I really struggled to **eat**...

published on 28/05/22 at 13:56 | Blogs | United Kingdom | www.woolofthekng.com

INSETE INTELLIGENCE

Illustrative Social Posts

Reflecting the Positive Sentiment

InterContinental opening a resort in Crete next year

...of meeting spaces. Crete is one of **Greece**'s leading destinations with more than six million **visitors** thanks to its picturesque beaches, pristine natural beauty, exquisite **cuisine** and thousands of years of culture and history, including Minoan Era...

published on 25/05/22 at 04:14 | Blogs | United Kingdom | www.headforpoints.com

Arsenal defender William Saliba on **holiday** in Mykonos in **Greece**, after completing the post-season international break with France. #afc pic.twitter.com/ghqAdZFHPF

published on 15/06/22 at 22:24 | Twitter | United States | twitter.com

HOW TO TRAVEL THE GREEK ISLANDS! SANTORINI TO MILOS

...nnel/UCwQvOh0a8gQIWAKB2H7CxaA ---------- In this video we **travel** by Ferry from Santorini to Milos in **Greece** Watch all our Greece Videos here: https://www.youtube.com/watch?v=rznv1GInbpQ&list=PLFIq3fAhPf9-kxXxfQgusDerunJZPxvn0 Music by...

published on 11/06/22 at 14:00 | YouTube | United States | youtube.com

Greece is the word for summer holidays

Almost immediately after opening its doors in 2020, Shila established itself as the must-stay address in Athens' chic...

published on 05/06/22 at 11:55 | Newspaper | United Kingdom | www.ft.com

Lady of Crypto @LadyofCrypto1 shared an image

Picked up a new yacht on my **Athens trip**. Thanks #crypto. Blessed pic.twitter.com/9E7GYfTDfF

published on 11/06/22 at 18:21 | Twitter | United Kingdom | twitter.com

Your Favorite Vegan Cheese Brand Violife Just Launched 3 Dairy-Free Dips: French Onion, Ranch, and...

...a pioneer in the vegan **food** category that got its start in Thessalonica, **Greece** in the 1990s and now offers a wide variety ... plant-based chocolaty spread that can be **eaten** by itself, spread on a cracker, or baked into a favorite dessert." Violife's...

published on 09/06/22 at 17:00 | Online News Other | United States | vegnews.com

Dubai ranks as world's 7th safest destination for family vacation

issac john created a post

...**friendly** activities are Pattaya, Thailand with 35.5 per cent of family-**friendly** activities, followed by Heraklion, **Greece** ... number one destination for family **holidays** in a survey by **travel** insurance comparison site InsureMyTrip. The data...

published on 07/06/22 at 19:22 | Newspaper | United Arab Emirates | www.khaleejtimes.com

Greece-China: a history of friendship, working towards a better future

georgios iliopoulos created a post

...events such as the **Cultural** Year of **Greece** in China in 2008, the China-**Greece Cultural** Exchanges and Cultural Industry... Greece as a major **touristic** destination is looking forward to welcoming once again, the Chinese **tourists** who wish to...

published on 05/06/22 at 05:56 | Online News Other | China | news.cgtn.com

Take a summer tour of Athens architecture and more

...aims to be **Greece**'s first eco-conscious skyscraper, created following principles of **sustainable architecture**, as well as ... pandemic started, so had to remain closed to **visitors** for a while, but it is now reopening with a bang and a wealth of...

published on 24/06/22 at 12:30 | Magazine | United Kingdom | www.wallpaper.com

Greece Aims to Establish Aegina Isle into Year-round Destination

gtp editing team created a post

...strengthen **Greece**'s brand name." The minister went on to refer to the importance of developing unique-to-the-island **tourist** ... interest forms of tourism focusing on **gastronomy**, religion and culture through the enhancement of primary production and the...

published on 27/06/22 at 14:28 | Blogs | Greece | news.gtp.gr

2nd Quarter 2022

INSETE INTELLIGENCE

Negative Sentiment Drivers

What vigilance points to watch reputation-wise?

Negative sentiments influencing Greece's reputation were mostly attributed to Greece's own issues and friction related to external factors (social, environmental, political, labor, health, inflation…). A sentiment of "anticipated" issues related to tourism prices for tourists is visible too.

Examples of reputation drivers…

Topics mentioned may be not "mainstream" in the sentiment flow, sometimes even "anecdotal" or outside the tourism space strictly, however they can generate a negative influence on the overall attractiveness of Greece in potential travelers' mind.

- **Flight cancellations**
- **Confirmed case of monkeypox** in Greece
- **Excessive pruning of trees** throughout Greece
- **Impact of the Ukrainian war on Greece** (the cost of living, Russian tourists had to cancel their planned trips to Greece due to the EU sanctions…)
- The dispute over **the Parthenon marble** with British museum
- Tourists **overcharged** at a Greek restaurant in Mykonos
- New migrant camp in Greece said to be at risk of **forest fire**
- Greece warned by EU to fix **deficiencies of its frontier**
- **Holiday price shocks** in Greece (price increases for airline tickets, hotels and package tours)
- Turkish spy agency captured a suspected **Greek spy**
- **Hospitality staff shortages** in Crete

Illustrative Social Posts

Reflecting the Negative Sentiment

...holidaymakers stranded in Greece since Saturday after flight to Dublin cancelled...

ciara o'loughlin created a post

...holidaymakers who were due to travel to Dublin Airport from Rhodes, **Greece**, on Saturday are stranded in the country after their **flight** was cancelled twice. Their original TUI flight was cancelled a couple of hours before it was scheduled to depart...

published on 30/05/22 at 14:50 | Newspaper | Ireland | www.independent.ie

Over 1,000 Monkeypox Circumstances Reported in 29 Nations So Some distance, WHO Warns of 'Actual...

created a post

...mostly in Europe, and notably in Britain, Spain and Portugal. **Greece** on Wednesday confirmed its first case of the **monkeypox** after a man a man who had recently travelled to Portugal tested positive. The man was in hospital and in a stable condition...

published on 09/06/22 at 03:23 | Online News Other | India | govtexam.net

Excessive tree pruning: What effects will it have on the microclimate of Athens?

... her? THODORIS ANTONOPOULOS 1.10.2021 **Greece** / Environmental regeneration in Ermou: How the most commercial road will change ... Chalandri Shopping Center 20.4.2022 **Environment** / Most protected areas do not benefit from wildlife ...

published on 27/04/22 at 08:19 | Online News Other | Greece | www.lifo.gr

Greece is suffering from the consequences of the Ukraine war

...food industry suffers from the **Ukraine** war, but also the tourism industry. **Greece** is Russia's second...however, a majority of Russian **tourists** cancel their planned trips to **Greece** . The Greek suffers from this...

published on 26/04/22 at 17:43 | TV / Radio | United States | de.euronews.com

Greece rebuts British Museum claim Parthenon marbles were 'removed from rubble'

helena smith created a post

...**art** – is in Athens, **exhibited** in a purpose-built **museum** at the foot of the Acropolis. The latest spat comes after **Greece** ... shoe-sized box **artefact** had long been displayed at the Antonio Salinas archaeological **museum** in Palermo. "**Greece**," she...

published on 23/05/22 at 06:00 | Newspaper | United Kingdom | www.theguardian.com

Tourist stunned after being charged £1,300 at Greek restaurant for meal for three...

...Greece **holiday** resorts - but Corfu DOESN'T make the list GOING ALL IN Cheapest all-inclusive **holidays** to **Greece** & Turkey ... YOU THERE Spain **holiday** boost as UK government updates **travel** advice for Brits **HOLIDAY** NIGHTMARE My £2,000 honeymoon was...

published on 26/05/22 at 11:31 | Newspaper | United Kingdom | www.thescottishsun.co.uk

Forest fire fears over new Greek migrant camp

...island's main town of Mytilene and its **tourist** resorts. Barbed wire keeps out intruders. A private security company now . nearest treeline. "We are also developing **artificial** intelligence fire sensors in collaboration with the European Union," a...

published on 09/06/22 at 17:39 | Newspaper | India | www.hindustantimes.com

EU gives Greece warning to fix border

created a post

...other member states to impose longer-term restrictions on **travelers** arriving from **Greece**. Such measures, under the never before used **Article** 26 of the Schengen code, can be taken for up to six months and can be renewed up to three times. EU...

published 2 hours ago | Online News Other | Azerbaijan | en.azvision.az

Price shock: Holidays in Italy, Spain and Greece are significantly more expensive

... to **eat** at sights or **tourist attractions** . Basically it can be said: The more **touristy** the holiday region ... to about 2.20 euros. In Spain, for example, locals and **tourists** benefit from a tank discount. There, per...

published on 29/06/22 at 18:03 | Newspaper | Germany | www.hna.de

Turkish spy agency captures suspected Greek spy

...of his **trips** to Turkey, national television stations said, citing security sources. **An official at the Greek** Embassy in Ankara declined to comment on the allegations. The arrest comes **amid** tensions...

published on 26/06/22 at 20:05 | Blogs | France | look-travels.com

2nd Quarter 2022

INSETE INTELLIGENCE

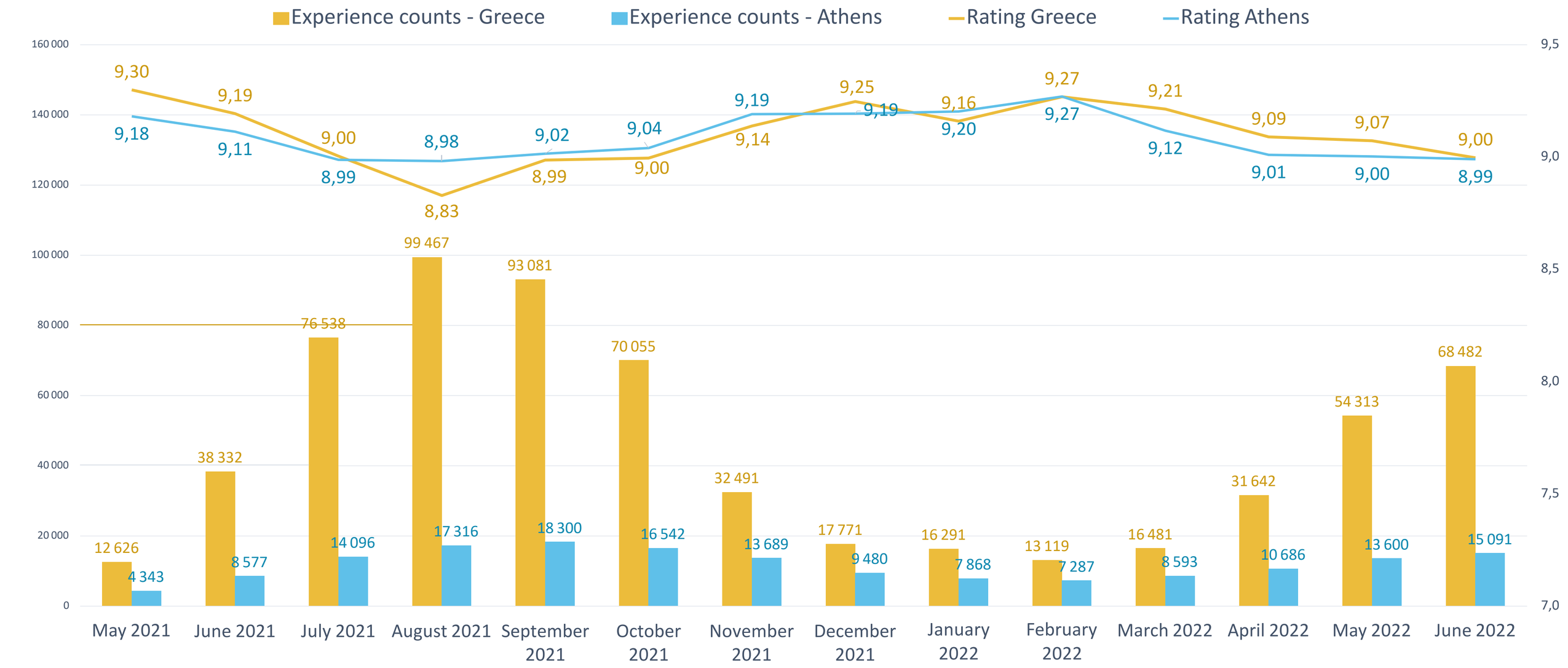
KEY SENTIMENT TRENDS - SUMMARY

Quarter 2 - 2022

- Sentiment polarity in Greece and Athens declined compared to the previous quarter. However, given the volatile global and European situation, Greece and Athens have maintained their reputation positive and competitive on a quarterly average. The dynamic observed at the end of the quarter shows close reputation scores for Greece, Italy (on the decline too) and Portugal.
- Key tourism themes (especially culture, gastronomy, and hospitality) contribute to maintain a positive reputation of Greece, while the pandemic-related conversations continue to improve. A decline of sentiment about the environment is observed, mirroring possible concerns around summer impact in this field.
- The drop of sentiment is visible for most markets but levels in absolute values remain very positive, particularly in the French and Italian markets, while Germany, the UK and the US are showing more significant declines in the quarter (notably at the end of the period).
- A wide variety of themes related to culture, nature, food, and lodging are shared in this quarter, illustrating the multifaceted feature of Greece including mainstream/iconic and hidden gems. Conversations about lodging were prominent in Q2, in the prospect of the summer season. The diversity of “ambassador” profiles was also great, from art to sport and royal celebrities! The concept of water in various forms (beaches, baths, boats…) was also very active in social conversations mirroring a typical pre-summer sentiment.
- Negative sentiments influencing Greece’s reputation were mostly attributed to Greece’s own issues and friction related to external factors (social, environmental, political, labor, health, inflation…). A sentiment of “anticipated” issues related to tourism prices for tourists is visible too. The Ukraine impact is now quite limited in total conversations (est. around 3% only).

Destination Experience Reputation

Overall Experience Reputation Trends



INSETE INTELLIGENCE

Experience Reputation Dashboard (Greece)

GREECE

2nd Quarter 2022

Overall Rating:

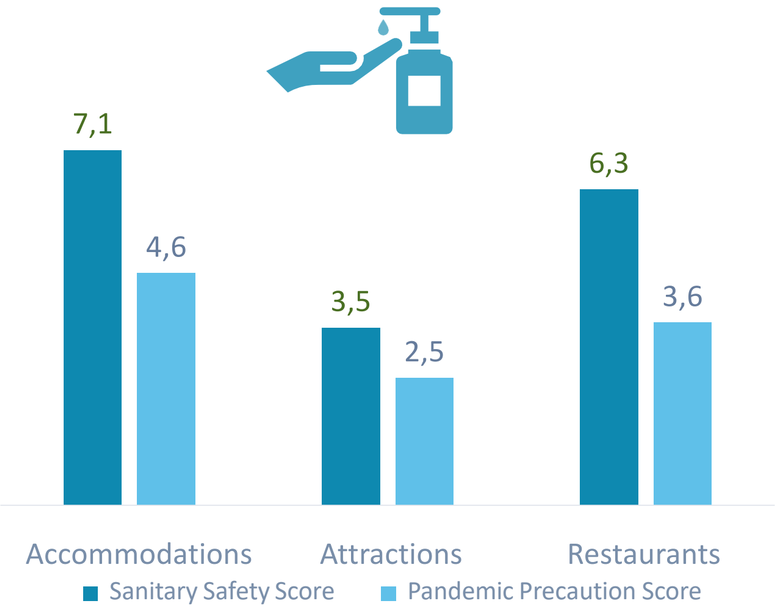
9,04

Europe Benchmark: 8,62

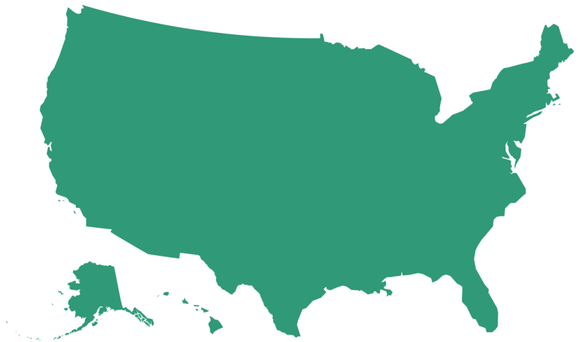
Athens: 9,0 / Seaside: 9,03 / Other: 9,14

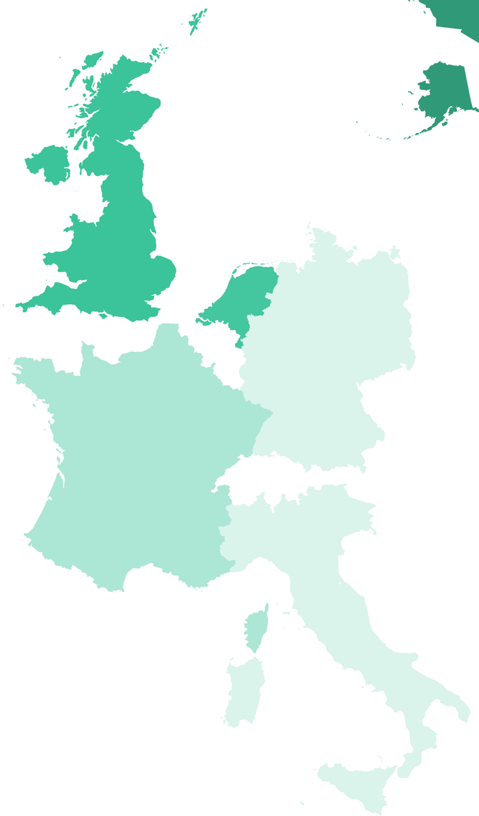
Sanitary Safety Score(*)

Pandemic Precautions Score(*)



Rating per market





	Rating (/10)	Reviews count
USA	9,19	3258
UK	8,83	8716
France	8,66	3388
Netherlands	8,60	1232
Germany	8,59	2680
Italy	8,59	1619

Note: based only on reviews having market origin information (about half of total reviews)

(*) Sanitary/Pandemic vigilance threshold is usually defined below 5/10

INSETE INTELLIGENCE

Experience Reputation Dashboard (Athens)

ATHENS

2nd Quarter 2022

Overall Rating:

9,0

Europe Benchmark: 8,62

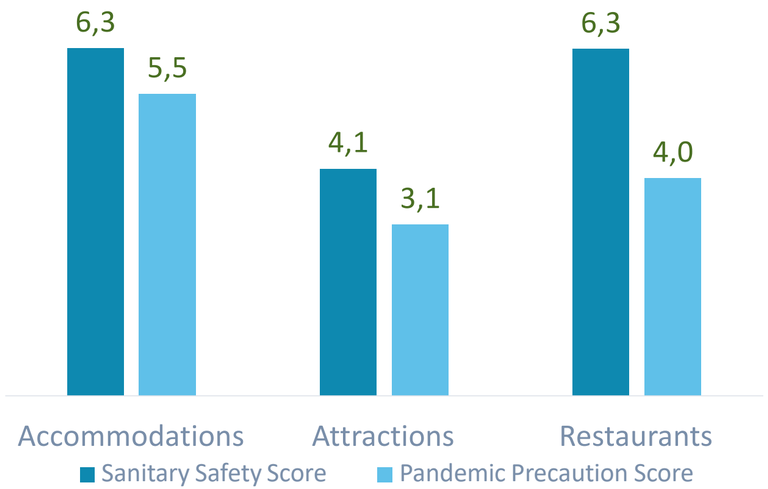
Greece: 9,04 / Seaside: 9,03 / Other: 9,14

Sanitary Safety Score(*)

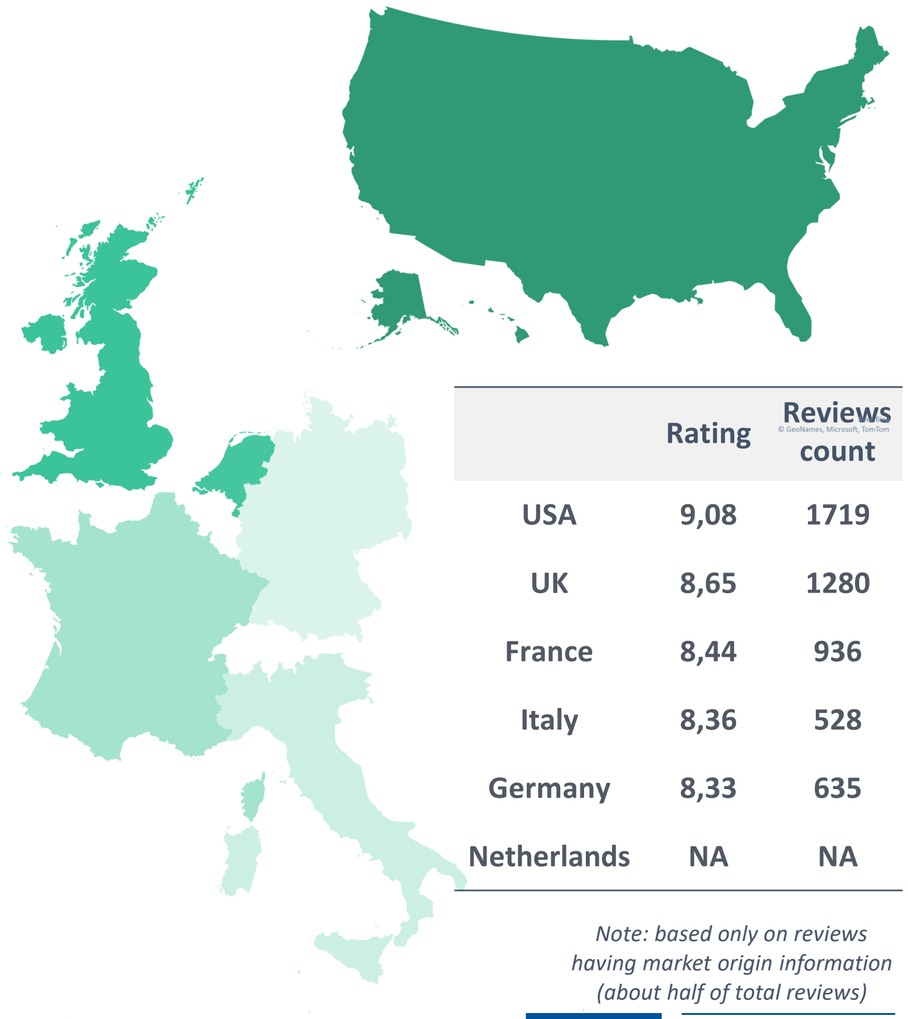
Greece Avg. : 6,6

Pandemic Precautions Score(*)

Greece Avg. : 3,9



Rating per market



	Rating	Reviews count
USA	9,08	1719
UK	8,65	1280
France	8,44	936
Italy	8,36	528
Germany	8,33	635
Netherlands	NA	NA

Note: based only on reviews having market origin information (about half of total reviews)

(*) Sanitary/Pandemic vigilance threshold is usually defined below 5/10

INSETE INTELLIGENCE

SEASIDE

Experience Reputation Dashboard (Seaside)

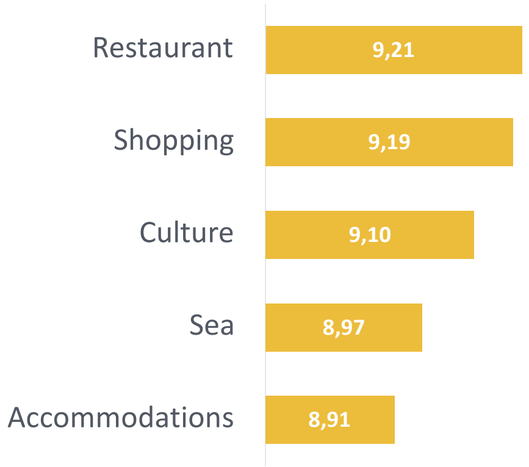
2nd Quarter 2022

Overall Rating:

9,03

Europe Benchmark: 8,62

Greece: 9,04 / Athens: 9,0 / Other: 9,14

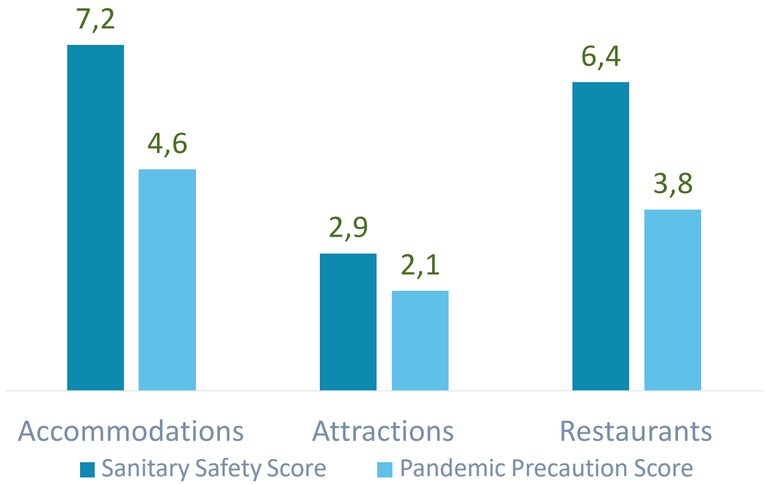


Sanitary Safety Score(*)

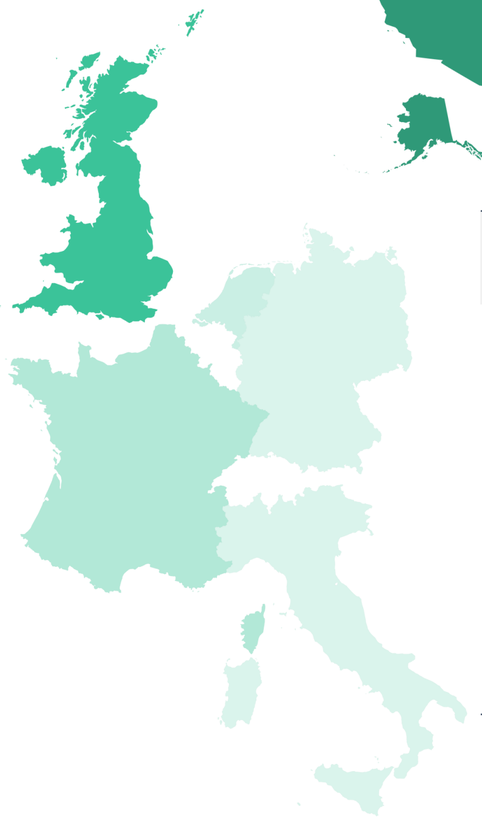
Greece Avg. : 6,6

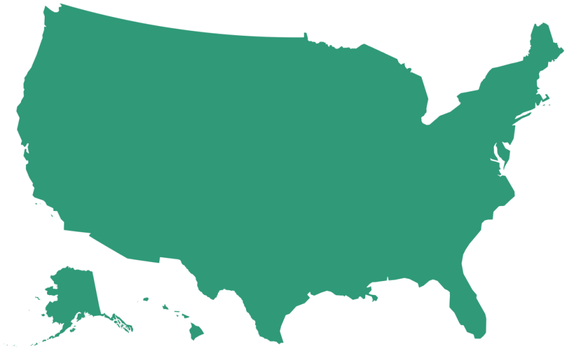
Pandemic Precautions Score(*)

Greece Avg. : 3,9



Rating per market





	Rating	Reviews count
USA	9,28	1213
UK	8,85	6925
France	8,7	1940
Netherlands	8,67	744
Italy	8,65	914
Germany	8,65	1585

Note: based only on reviews having market origin information (about half of total reviews)

(*) Sanitary/Pandemic vigilance threshold is usually defined below 5/10

INSETE INTELLIGENCE

OTHER AREAS

Experience Reputation Dashboard (Other areas)

2nd Quarter 2022

Overall Rating:

9,14

Europe Benchmark: 8,62

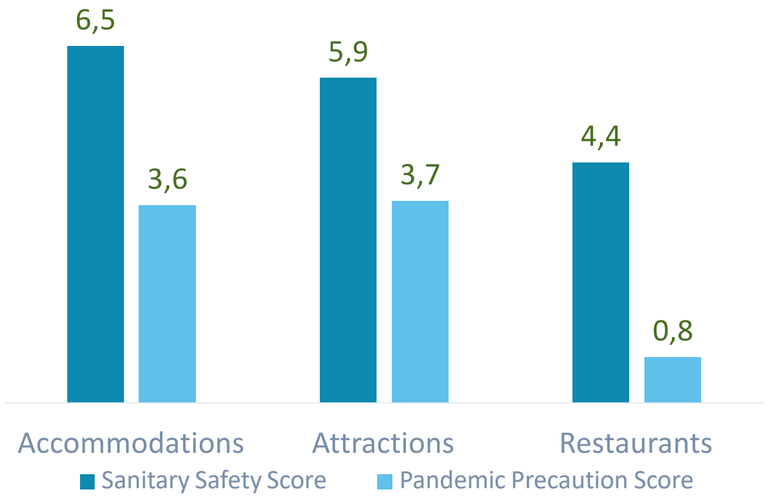
Greece: 9,04 / Athens: 9,0/ Seaside: 9,03

Sanitary Safety Score(*)

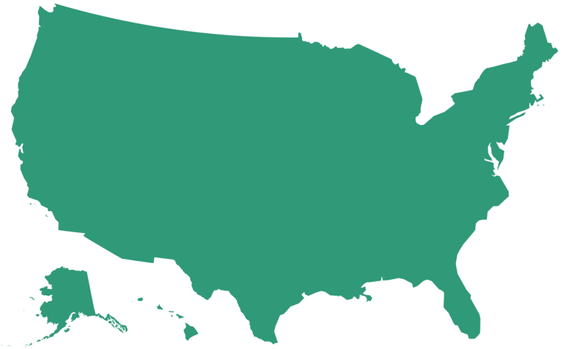
Greece Avg. : 6,6

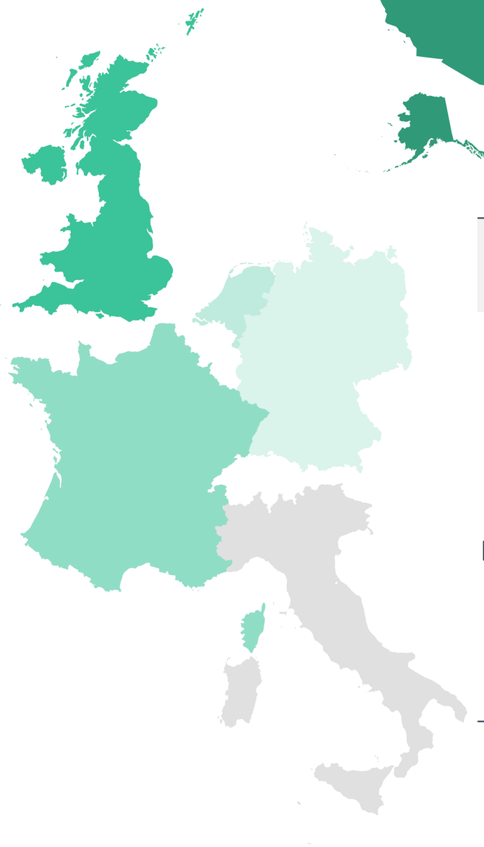
Pandemic Precautions Score(*)

Greece Avg. : 3,9



Rating per market





	Rating	Reviews count
USA	9,48	326
UK	9,04	511
France	8,89	512
Netherlands	8,81	200
Germany	8,76	460
Italy	NA	NA

Note: based only on reviews having market origin information (about half of total reviews)

(*) Sanitary/Pandemic vigilance threshold is usually defined below 5/10

INSETE INTELLIGENCE

Experience Reputation Dashboard (Summary)

2nd Quarter 2022

2nd Quarter 2022	**Greece**	*Evol. Q1/Q2*	**Athens**	*Evol. Q1/Q2*	**S&B**	*Evol. Q1/Q2*	**Other**	*Evol. Q1/Q2*	**Europe (*)**	*Evol. Q4/Q1*
Overall Rating	**9,04**	*-0,17*	**9,00**	*-0,19*	**9,03**	*-0,28*	**9,14**	*-0,06*	**8,62**	*-0,07*
Culture	**9,26**	*-0,28*	**9,42**	*-0,14*	**9,10**	*-0,38*	**9,20**	*-0,34*		
Restaurants	**9,17**	*0,01*	**9,07**	*-0,14*	**9,21**	*-0,13*	**9,15**	*0,16*		
Sea	**9,04**	*-0,35*	**9,26**	*-0,13*	**8,97**	*-0,37*	**9,36**	*-0,19*		
Shopping	**8,92**	*-0,07*	**8,81**	*-0,15*	**9,19**	*-0,08*	**9,03**	*0,01*		
Accommodation	**8,85**	*-0,07*	**8,60**	*-0,34*	**8,91**	*-0,17*	**8,97**	*0,12*		
Sanitary Safety	**6,6**	*0,64*	**5,5**	*-0,87*	**6,7**	*1,53*	**6,2**	*-0,20*		
Pandemic Precautions	**3,9**	*-1,07*	**4,0**	*-0,48*	**3,9**	*-1,28*	**3,4**	*-2,35*		
Accommodation - Sanitary Safety	**7,1**	*0,64*	**6,3**	*-0,13*	**7,2**	*0,79*	**6,5**	*-0,18*		
Accommodation - Pandemic Precautions	**4,6**	*-1,52*	**5,5**	*1,56*	**4,6**	*-2,49*	**3,6**	*-2,83*		
Attractions - Sanitary Safety	**3,5**	*-0,56*	**4,1**	*-1,25*	**2,9**	*0,79*	**5,9**	*0,91*		
Attractions - Pandemic Precautions	**2,5**	*-0,82*	**3,1**	*-1,26*	**2,1**	*0,27*	**3,7**	*-0,33*		
Restaurants - Sanitary Safety	**6,3**	*-0,87*	**6,3**	*-1,47*	**6,4**	*2,52*	**4,4**	*-4,63*		
Restaurants - Pandemic Precautions	**3,6**	*-1,36*	**4,0**	*-1,88*	**3,8**	*1,62*	**0,8**	*-7,50*		
Sanitary/Pandemic vigilance threshold is usually defined below 5/10										
Overall Rating	**9,04**	*-0,17*	**9,00**	*-0,19*	**9,03**	*-0,28*	**9,14**	*-0,06*	**8,62**	*-0,07*
USA	**9,19**	*-0,18*	**9,08**	*-0,27*	**9,28**	*-0,13*	**9,48**	*0,00*		
UK	**8,83**	*-0,11*	**8,65**	*-0,30*	**8,85**	*0,04*	**9,04**	*-0,09*		
NL	**8,60**	*-0,31*	**NA**	*NA*	**8,67**	*-0,59*	**8,81**	*NA*		
DE	**8,59**	*-0,17*	**8,33**	*-0,22*	**8,65**	*-0,35*	**8,76**	*-0,36*		
FR	**8,66**	*-0,07*	**8,44**	*-0,25*	**8,70**	*-0,16*	**8,89**	*0,03*		
IT	**8,59**	*-0,20*	**8,36**	*-0,34*	**8,65**	*-0,32*	**NA**	*NA*		

(*) Benchmark based on 34 European Countries for the same period

INSETE INTELLIGENCE

KEY REVIEWS TRENDS - SUMMARY

Quarter 2 - 2022

- In a context of growth in the number of reviews that shows a positive visitation dynamic, the overall ratings for both Athens and Greece have gradually declined during the quarter and seems establishing a lower levels compared to the same period in 2021.
- However, the downward trends in Q2 are recorded in most destinations in Europe and for the third consecutive quarters, Greece has maintained its competitiveness by outperforming the European averages.
- Compared to the previous quarter, there was a downward trend in ratings for most markets across Greece regions monitored. Destinations outside Athens and S&B have shown the highest resilience in the Accommodation, Restaurants and Shopping activities.
- Ratings were on the decline in all the tourism categories in most regions, notably culture and sea, as well as accommodations in Athens.
- Despite the decrease in ratings (notably for Athens), US and UK visitors scored again their experiences high and above other markets, while the decline is less marked among the French.
- While there were variations in different tourism verticals, the sentiment around overall sanitary safety (including cleanliness/hygiene and pandemic precaution aspects) remains above vigilance thresholds (5/10) in all regions. However, the specific pandemic precaution sentiment fell and marked below vigilance score in all regions and verticals, highlighting the challenge in managing the flux of guests and visitors, especially in potentially crowded spaces (restaurants, attractions…).

Toplines

TAKE-AWAYS

Quarter 2 - 2022

1. Greece and Athens see their **reputation levels decline** in the quarter both in terms of sentiment “at large” and based on visitor experience.
2. In a volatile global and European situation where most competitors are facing similar challenges (pandemic, labor shortage, inflation, over tourism risks etc), **Greece and Athens have maintained however their competitiveness** thanks to a multi-faceted sentiment in relation to culture, nature, food and lodging, shared by a great variety of ambassadors.
3. The most recent dynamic of the quarter tends to show Greece, Portugal and Italy in a much more tightly bunched.
4. The Greece image **does not directly suffer from the Ukraine conflict** in terms of attractiveness **but is part of the conversations around inflation impact** and price impact for visitors.
5. Although experience-based reputation showed a downward trend (notably for cutural and sea POIs), **Greece still outperformed the European average** for **the third consecutive quarters**.
6. The pandemic context is less and less detrimental for the destination in terms of overall reputation but **could raise issues with the visitor experience in a context of busy summer** while we see a drop in the pandemic precaution scores from visitors.
7. **The summer experience is expected to be challenging** and will have a paramount impact on the Greece competitive reputation overall. The ability of operators **to ensure the ”smoothest” experience for their guests** will play a key role in the equation.

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