INSETE INTELLIGENCE

travelsat

# ATHENS / GREECE SENTIMENT TRACKER /Q4 REPORT (Oct- Dec. 2022)

TCI Research
Travel Competitive Intelligence

UNWTO
Innovation Award

Ευρωπαϊκή Ένωση
Ευρωπαϊκό Ταμείο Περιφερειακής Ανάπτυξης
ΔΗΜΟΣ ΑΘΗΝΑΙΩΝ
ΑΘΗΝΑ
ΠΕΡΙΦΕΡΕΙΑΚΟ ΕΠΙΧΕΙΡΗΣΙΑΚΟ ΠΡΟΓΡΑΜΜΑ ΑΤΤΙΚΗΣ
ΕΣΠΑ 2014-2020
ανάπτυξη - εργασία - αλληλεγγύη

# Εισαγωγή



Η ραγδαία μεταβολή των συνθηκών στις οποίες πραγματοποιούνται τα ταξίδια έχει αλλάξει σε μεγάλο βαθμό τα χαρακτηριστικά των ταξιδιωτικών αγορών, ιδιαίτερα σε ότι αφορά στα διεθνή ταξίδια. Ο Δήμος Αθηναίων προκειμένου να διευκολύνει την ανάκαμψη της τουριστικής δραστηριότητας στην Αθήνα και να διευκολύνει τις τουριστικές επιχειρήσεις και φορείς να προσαρμοσθούν στις νέες συνθήκες ανέθεσε στο ΙΝΣΕΤΕ την «Δράση Ενημέρωσης και Ευαισθητοποίησης των μελών / τουριστικών επιχειρήσεων στα νέα δεδομένα και ανάγκες της αγοράς: Ευέλικτη και Εξειδικευμένη πληροφόρηση των φορέων και Επιχειρήσεων. Στοχευμένη και οργανωμένη διάθεση δεδομένων επιχειρηματικότητας» με MIS 5083736.

Στα πλαίσια της ανωτέρω πράξης ανατέθηκε στην εταιρεία TCI Research, με την από 07/07/2021 σύμβαση, η συλλογή big data για την Αθήνα, την Ελλάδα και ανταγωνιστικούς προορισμούς, τόσο αναφορικά με στοιχεία που αφορούν στην προσφορά του τουριστικού προϊόντος, όσο και στην ζήτηση. Τα στοιχεία αυτά, που επιτρέπουν την ταχύτερη και αποτελεσματικότερη προσαρμογή των επιχειρήσεων στο διαρκώς μεταβαλλόμενο περιβάλλον του τουρισμού, αφορούν συγκεκριμένα:

-Σε δεδομένα με τα οποία παρακολουθείται συστηματικά, τεκμηριωμένα και πολύπλευρα η εξέλιξη της εικόνας της Ελλάδας και του τουριστικού προορισμού 'Αθήνα' τα οποία συλλέγονται μέσω τεχνικών social listening στο internet από ένα πλήθος πηγών όπως πχ Social Media, Blogs, Forums, Online news κ.ά.

-Σε στοιχεία αξιολογήσεων από 25+ Travel Reviews Websites και OTA platforms (πχ Booking, Google, C trip) που έχουν υποβάλει επισκέπτες για την τουριστική εμπειρία ως προς τα διάφορα επιμέρους 'συστατικά' (πχ διαμονή, εστίαση, αξιοθέατα κλπ). Στη μελέτη παρουσιάζονται αξιολογήσεις της εμπειρίας στην Ελλάδα συνολικά, στην Αθήνα, σε προορισμούς S&B συνολικά και όλους τους υπόλοιπους προορισμούς συνολικά. Επίσης, εξετάζονται οι αξιολογήσεις ανά χώρα προέλευσης των επισκεπτών (ΗΠΑ, ΗΒ, Γερμανία, Γαλλία, Ολλανδία, Ιταλία)

Στο παρόν τεύχος παρουσιάζονται τα αποτελέσματα της έρευνας που αφορά στο δεύτερο τρίμηνο του 2022.

# Κύρια Σημεία



1. Ως προς τη συνολική φήμη της Ελλάδας και της Αθήνας, σημειώθηκε άνοδος σε σχέση με το Q3.

2. Το net sentiment score (NSI) της Ελλάδας ξεπέρασε το αντίστοιχο της Ιταλίας και της Ισπανίας για όλο το Q4, ενώ το net sentiment score της Αθήνας ήταν υψηλότερο από εκείνο των ανταγωνιστικών προορισμών.

3. Αναλύοντας το net sentiment score ανά αγορά, η φήμη της χώρας παρουσιάζει ανόδους σε όλες τις υπό εξέταση αγορές. Η συνολική φήμη της χώρας και της Αθήνας έχει ανακάμψει σημαντικά στην αγορά του Ηνωμένου Βασιλείου (+53 μονάδες και +80 αντίστοιχα σε σύγκριση με το Q3). Άλλες αξιοσημείωτες αυξήσεις για την Ελλάδα σημειώνονται στην αγορά της Γαλλίας (+43 μονάδες) και στην αγορά της Γερμανίας (+38 μονάδες). Η Αθήνα επίσης, σημείωσε ανόδους στην γαλλική αγορά (+29 μονάδες) και στην ολλανδική (+27 μονάδες).

4. Ο όγκος των συζητήσεων στο διαδίκτυο αυξήθηκε για θέματα που σχετίζονται με τη γαστρονομία και τη φιλοξενία, ενώ έχουν μειωθεί οι συζητήσεις για την υγειονομική ασφάλεια, τον πολιτισμό και την καθαριότητα σε σύγκριση με το 3ο τρίμηνο. Οι βαθμολογίες του NSI είναι ιδιαίτερα υψηλές όσον αφορά τη φιλοξενία, τον πολιτισμό και τη γαστρονομία.

5. Οι θετικές συζητήσεις σχετικά με τα ταξίδια το φθινόπωρο και τον χειμώνα στην Ελλάδα, συνέβαλλαν στην ενίσχυση της φήμης της χώρας ως «τουριστικού προορισμού για όλες τις εποχές».

# Κύρια Σημεία



6. Σύμφωνα με την  αξιολόγηση της εμπειρίας με βάση την επίσκεψη, η Ελλάδα και οι επιμέρους προορισμοί διατήρησαν το Q4 την ανταγωνιστικότητά τους ξεπερνώντας τον  ευρωπαϊκό μέσο όρο.

7.Αξίζει να υπογραμμισθεί η βαθμολόγηση πάνω από τον ευρωπαϊκό μέσο όρο στην μεταβλητή value for money για όλους τους υπό εξέταση προορισμούς.

8. Επιπλέον, η προσφορά της Ελλάδας σε πολιτιστικές και παραθαλάσσιες δραστηριότητες βαθμολογείται υψηλότερα το Q4.

# Content


06 Travelsat Sentiment Methodology

08 Key Sentiment Indexes

20 Destination Experience Reputation

30 Toplines

# Travelsat Sentiment Methodology

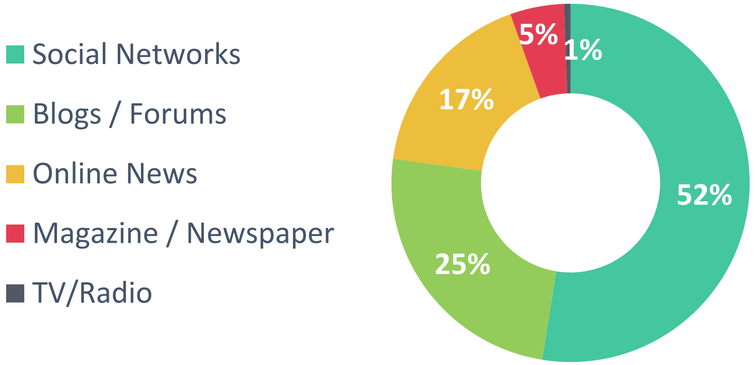
# TRAVELSAT© Sentiment Methodology

## Social Data and Visitor Reviews Monitoring for 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 differing **media, 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 the context of post-crisis management.
- In the past 12 months, **Greece was mentioned 851K+ in social conversations** in relation to travel, generating 10,1M engagements, shared by **183K+ 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

# KEY SENTIMENT TRENDS - SUMMARY



## Quarter 4 - 2022

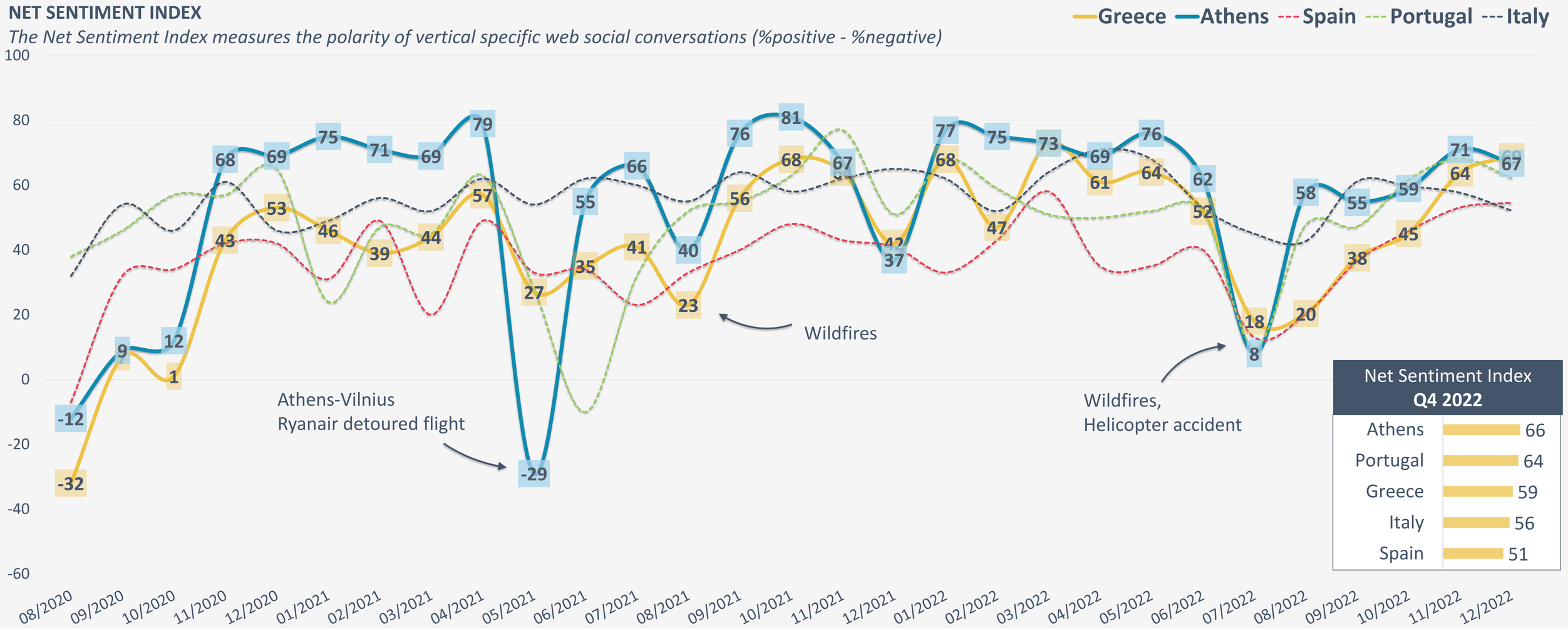
- Since the decline seen during the summer months of 2022, **sentiment polarity in Greece has risen in the 4th quarter of the year**, recuperating the score it had throughout the 2nd quarter (59, +34 pts). **A similar pattern can be seen in Athens**, where the score now stands at 66 (+26 pts). **Greece's overall Net Sentiment Score for the full 4th quarter stands above that of Italy and Spain**, while **Athens' overall NSI outperforms all other competing destinations' scores**.
- **Greece's and Athens' NSI has risen in all markets since the 3rd quarter**. **For Greece, the UK market has especially recuperated**, moving from a negative score of -4 to the current score of 49 (+53 pts). **The same can be said about Athens**, where its score in the UK market was at -17 in Q3, but is currently at 63 in Q4 (+80 pts). **Other notable increases** for Greece are seen in **France** (+43 pts) and **Germany** (+38 pts), while the French (+29 pts) and Dutch (+27pts) markets marked large changes for Athens.
- **Conversations around COVID-19 have continued to decrease throughout the 4th quarter of 2022**, a global trend that has followed since the lifting of restrictions. Such a trend is likely to continue if no new outbreaks or restrictions are announced, yet **destinations continue to be scrutinised visitors in their capacity to maintains sanitary safety conditions**.
- While the **volume of social conversations increased on topics related to gastronomy and hospitality**, they have decreased for Sanitary Safety, culture and cleanliness in comparison to the 3rd quarter. As has been seen with broader scores, **NSI scores have increase for the majority of the aforementioned topics**. NSI scores are especially high when it comes to hospitality, culture, and gastronomy.
- Moving in line with the season, **the 4th quarter contained a high degree of positive drivers related to Autumn and Winter travel in Greece**. This has helped place Greece's reputation as an "all-season tourist destination". Although a large degree of variety was found in topics, those related to **Greece's offer of culture and food attracted a high amount of engagement throughout the year**.
- Finally, **although negative content largely decreased compared to the 3rd quarter**, **there were still some present during the 4th**. Topics directly related to tourism had to do with **the use of animals as a means of transport**, **pickpockets stealing from visitors**, and **specific travel scams** that some had been affected by. On the other hand, topics that were not directly connected had to do with extreme weather, certain geopolitical issues, and the effects of inflation.

# Destination e-Reputation - Net Sentiment Index

## Benchmark Evolutions

**NET SENTIMENT INDEX**

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



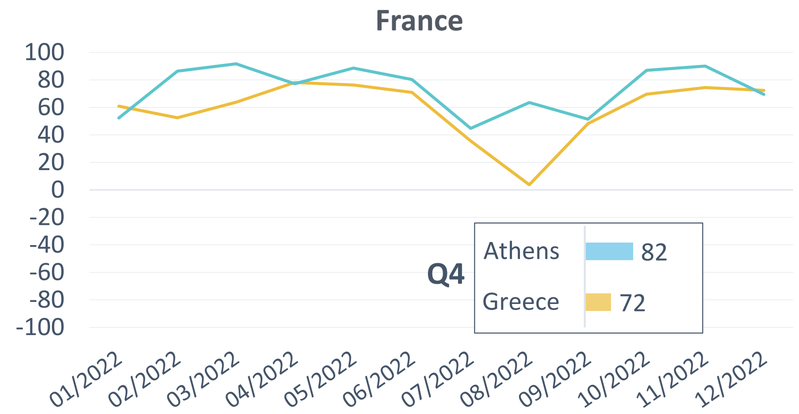

| Net Sentiment Index Q4 2022 | |
|---|---|
| Athens | 66 |
| Portugal | 64 |
| Greece | 59 |
| Italy | 56 |
| Spain | 51 |

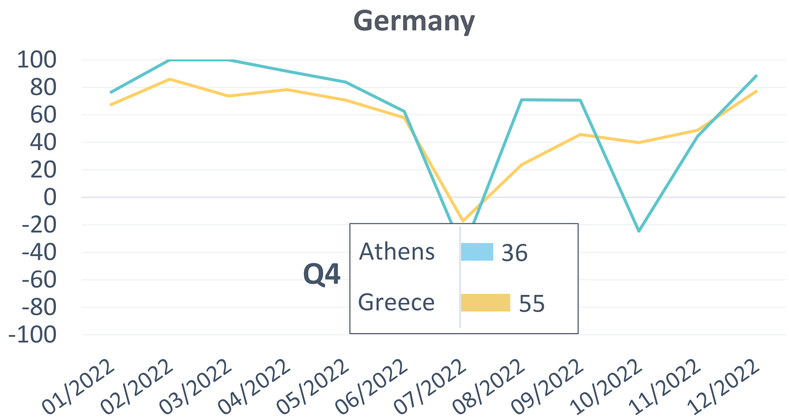
# Destination Sentiment per Market

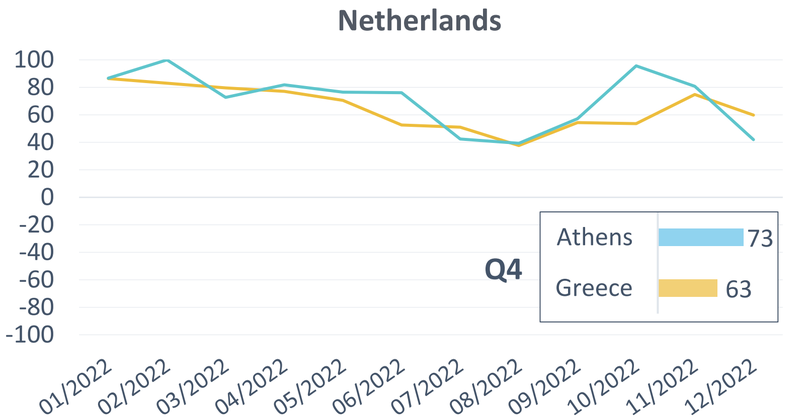
## What is the tonality of conversations in Athens' key markets?

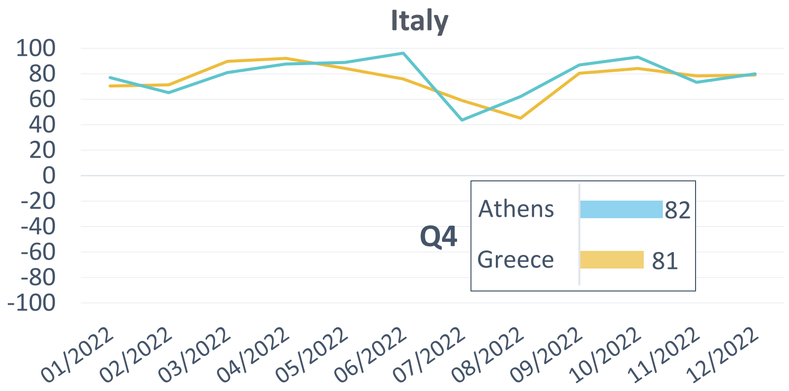
**NET SENTIMENT INDEX** — Greece — Athens

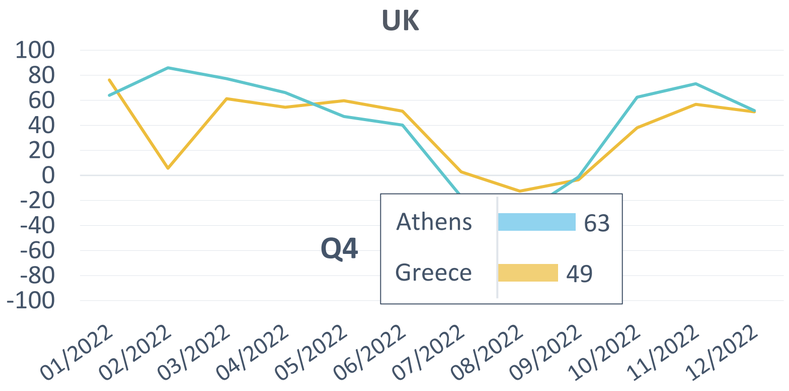
*The Net Sentiment Index measures the polarity of vertical specific web social conversations (%positive - %negative)*

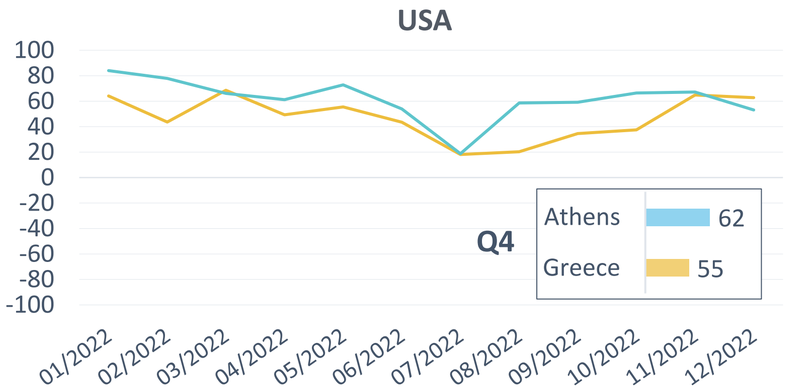


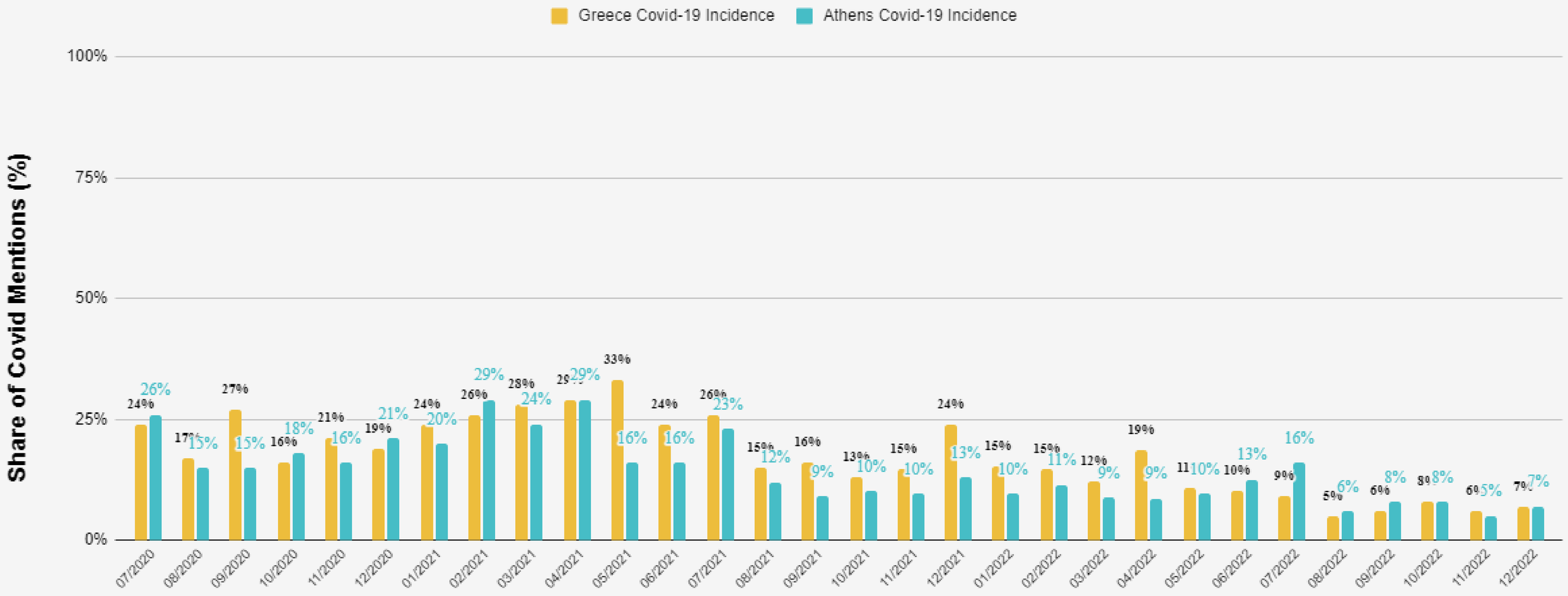



# Destination Sentiment

What is the incidence of Covid-19 in the destinations' conversations?



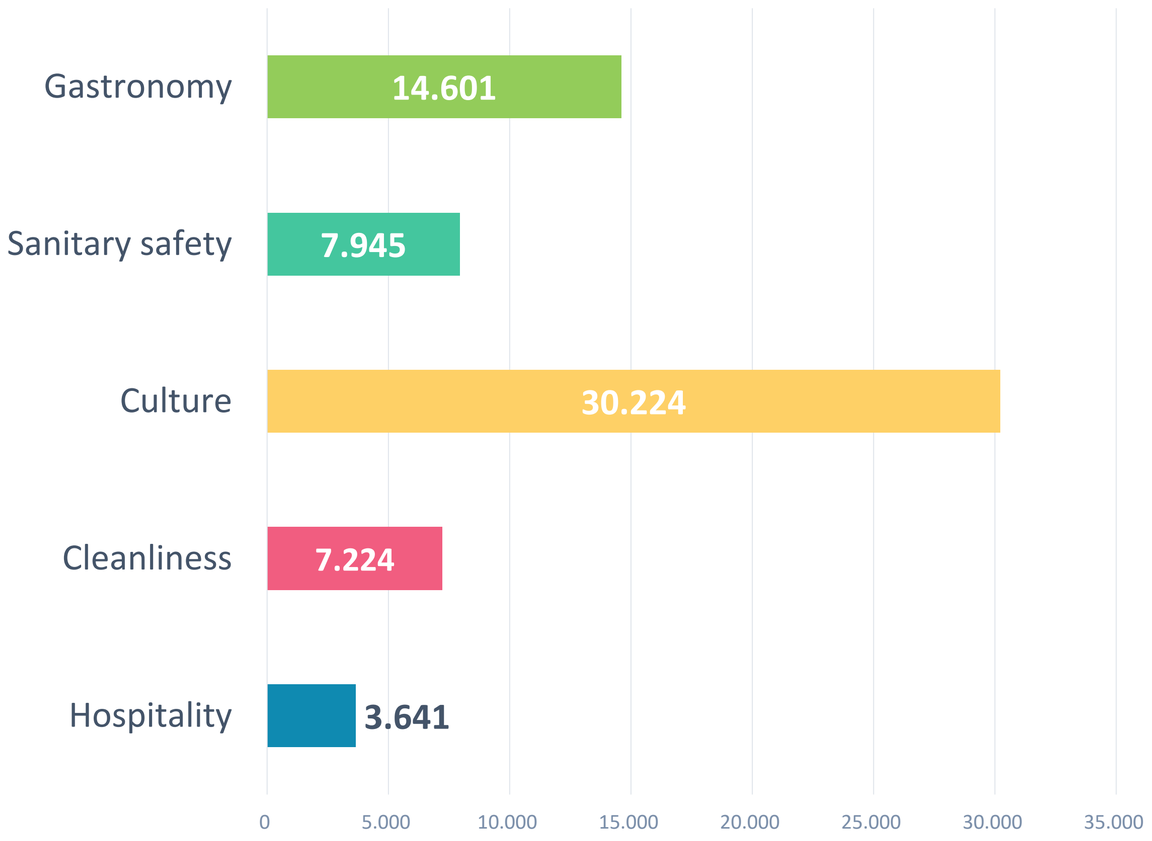

4th Quarter 2022

# Focus on specific reputation topics

**The volume of social conversations has increased on topics related to gastronomy and hospitality**, and decreased regarding Sanitary Safety, culture, and cleanliness topics compared to the 3rd quarter. **The polarity of sentiment has increased in the majority of tourism reputation topics**, having had decreased in the crowded summer months. The Net Sentiment Score is **especially high for topics on hospitality, culture, and gastronomy** (above 85 points). Conversations related to the conflict in Ukraine remain limited to 3% of the total.

**VOLUME OF CONVERSATIONS – OCT./DECEMBER 2022**

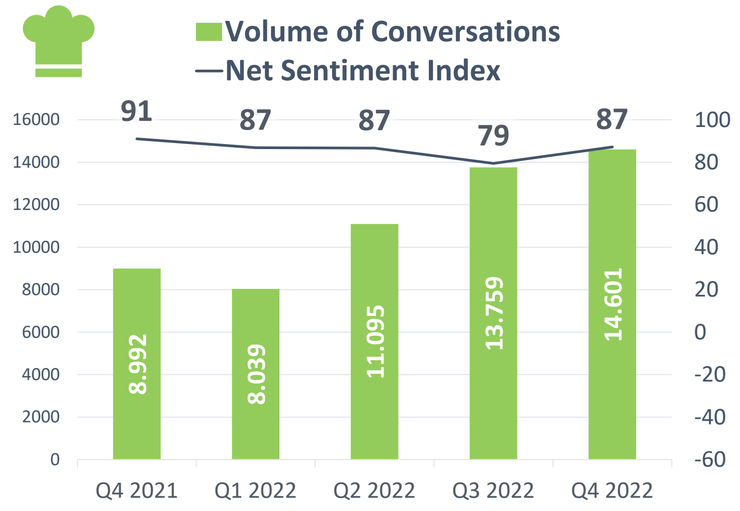
*Intensity of web social conversations*

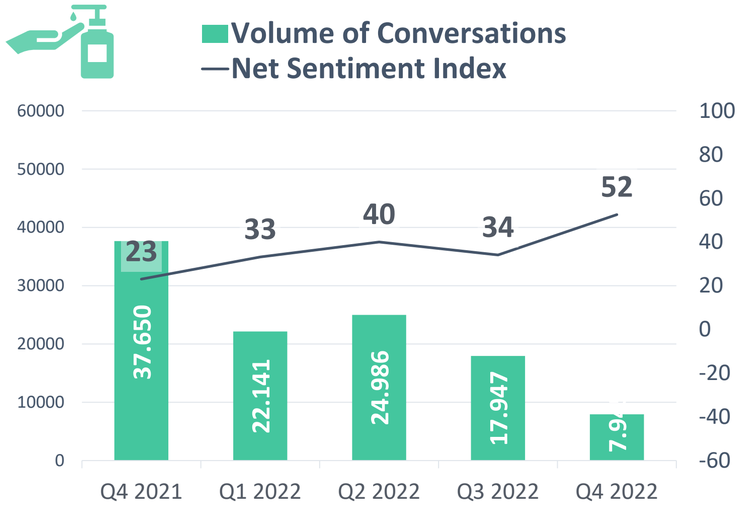


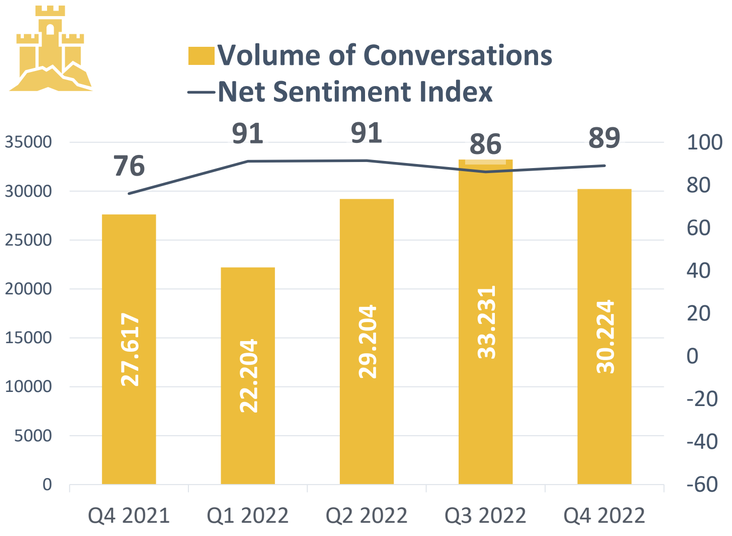

**NET SENTIMENT INDEX – OCT./DECEMBER 2022**

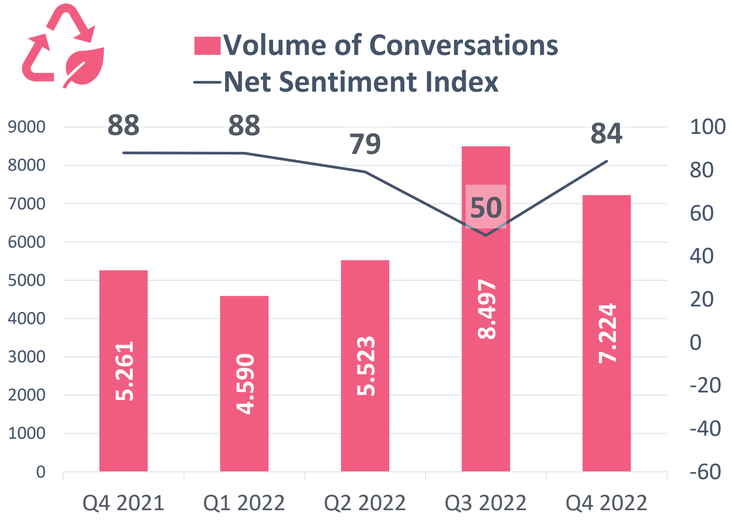
*Polarity of verticals specific web social conversations (%positive - %negative)*

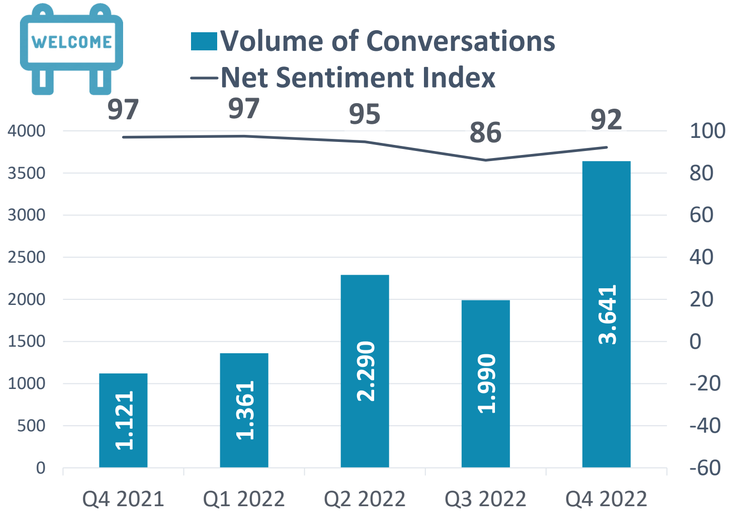
# Reputation Topics – Annual Trends



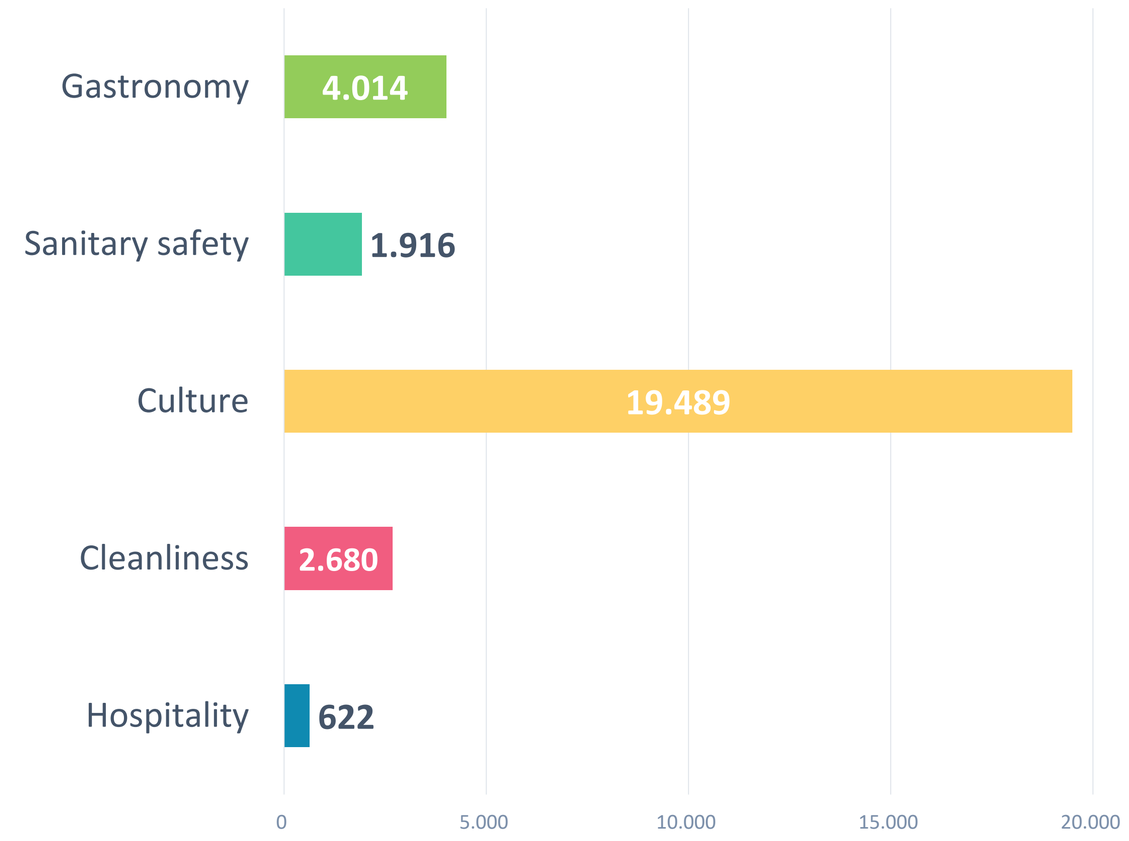
# Focus on specific reputation topics

ATHENS

Focusing on Athens, **the volume of conversations declined on all the topics, except for an increase in that of culture**. Similar to Greece, **Athens' polarity of conversation has made a great comeback on most of the topics**. However, the Net Sentiment Score declined for the topic of gastronomy. Culture and hospitality topics marked very high scores, both being above 90.

**VOLUME OF CONVERSATIONS – OCT./DECEMBER 2022**

*Intensity of web social conversations*

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

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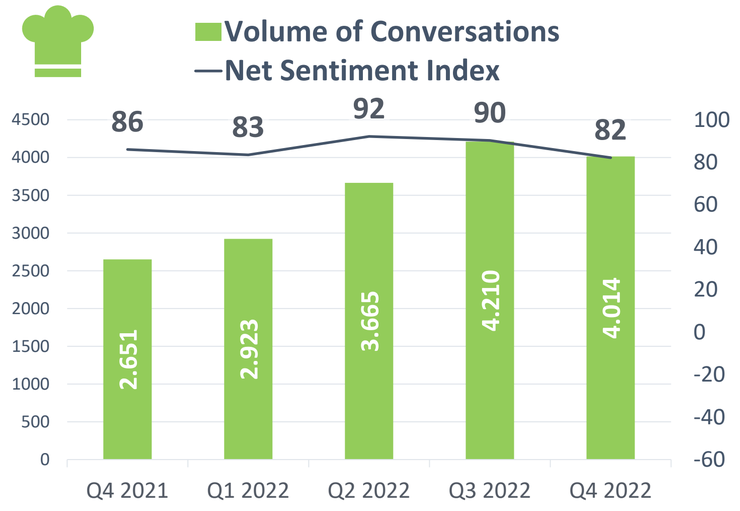
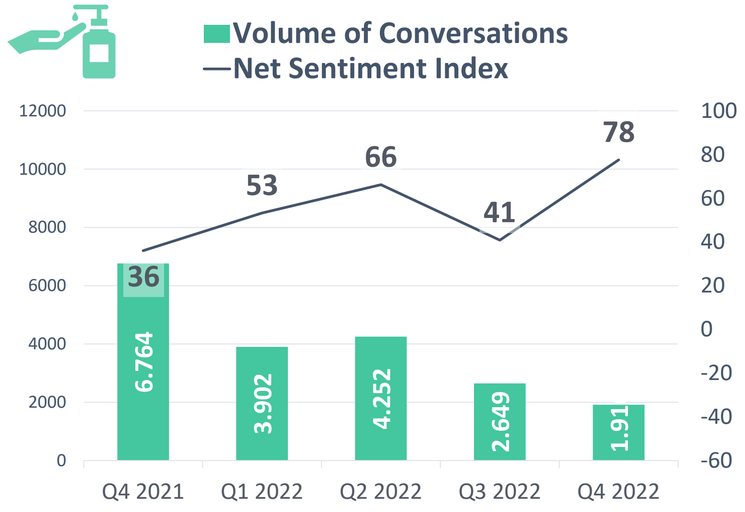
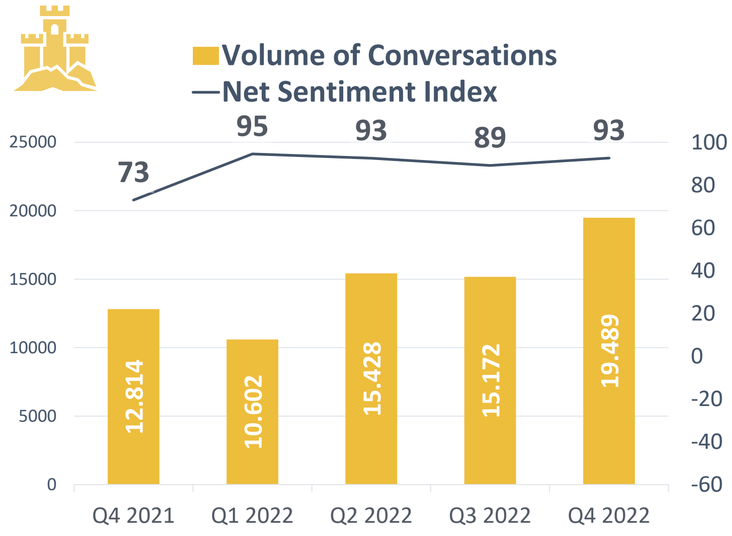
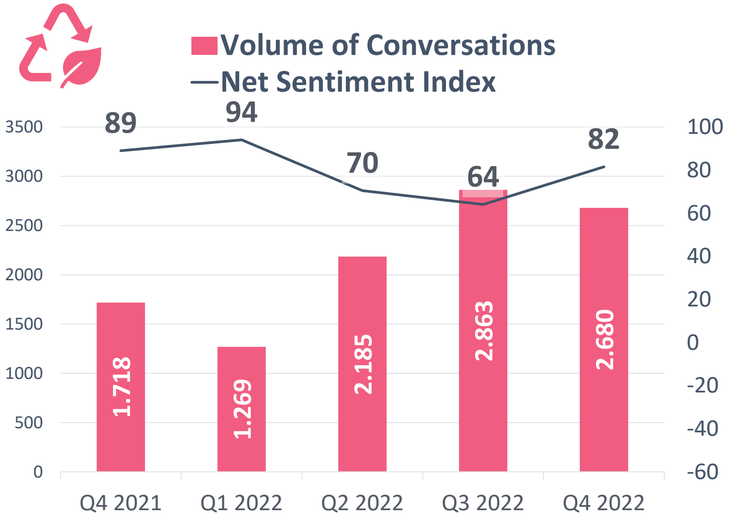
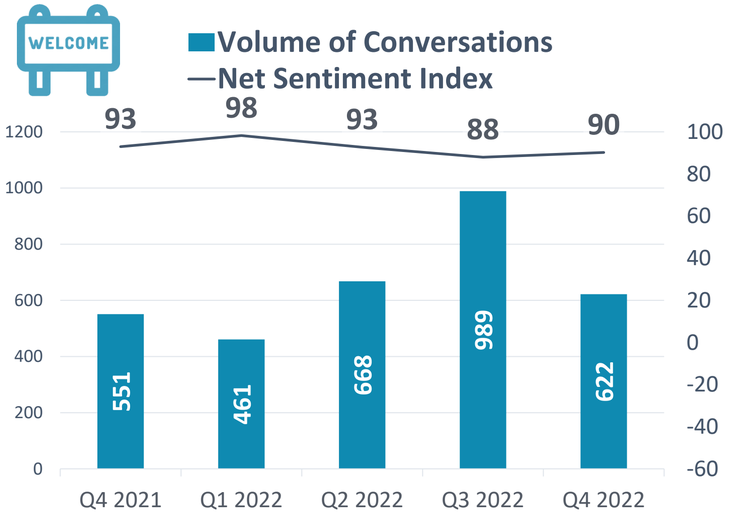


# Positive Sentiment Drivers (1/2)

## Fueling the destination's social reputation in the period

The 4th quarter was an active quarter for topics related to **Autumn and Winter travel** in Greece, helping to shape Greece's reputation as an "**all-season tourist destination**". Among the topics related to **tourism**, **culture** and **food topics seem to attract a high amount of engagement** in social conversations throughout the quarter.

*Examples of reputation drivers…*

- **The cosmopolitan town of Arachova is an ideal destination for winter**, with the beautiful ski centre of Parnassos
- **Christopsomo, or "Christ's bread,"** is **a traditional Christmas treat** in Greek households
- **Greek government hoping to attract more remote workers** from abroad, as Digital nomads could provide a significant boost to the Greek economy
- **Crete listed among the 10 places to escape the cold weather** this winter in Europe
- **Greek street food tour** in Athens (Pork Souvlaki, local pies, visiting a local farmer's market, etc.)
- Highlight of **Thessaloniki's cuisine**, renown for its quality and variety
- Discovering **beautiful traditional Greek architecture** in the northwesternmost city **Florina**
- **Hidden mountain villages** in the hinterland in Greece
- Inauguration of **the brand new Dimotiko Theatro station** in Athens, giving opportunity to discover the hydraulic system dating from Antiquity
- **100% vegan quick bites** in Athens won a **2022 Tripadvisor Travelers Choice Award**
- **Importance of a sustainable tourism model** after a record summer in Greece
- Athens selected **one of the best affordable holiday destinations** in Europe for 2023
- **Navarino Challenge, sports tourism and wellness event**, celebrated its 10th anniversary in Greece.
- Greece taking a big step in **reducing its plastic usage** in the tourism industry
- Information about **all-inclusive breaks for autumn and winter** in Greece
- Elegant and luxury stay at **Art Deco style hotel** in Thessaloniki

# Illustrative Social Posts

## Reflecting the Positive Sentiment

### Cosmopolitan Arachova: The Winter Mykonos of Greece

Delphi is only 10km away About 30 kilometers distant is the beautiful monastery of St. Luke, one of the most important Byzantine **architecture** sites across **Greece**. The nearby village of presents the Mausoleum of Nazi Victims from World War...

published on 24/11/22 at 09:15 | Online News Other | United States | greekreporter.com

### Christopsomo: Where Bread Meets Fine Art on the Greek Christmas Table

...cookies, and other **foods** during the **holiday** season. Greek Christopsomo Some Greek **holiday** goodies are steeped in ancient ... makers in **Greece**. In many parts of the country,"Christ's bread" has truly become a piece of timeless **art**, with incredibly...

published on 19/12/22 at 12:01 | Online News Other | United States | greekreporter.com

### How to Apply for a Digital Nomad Visa in Greece

...to work from **Greece**. So what is interesting is that in a more fluid and mobile work **environment**, we make it very easy for ... workers from abroad. Last year, the Greek **Tourism** Ministry with the telecom company Wind to provide better internet...

published on 29/11/22 at 18:34 | Online News Other | United States | greekreporter.com

### Where to escape the cold and get warm in Europe this winter

...at Heraklion Archaeological **Museum**, one of the best museums in **Greece**. 5. Sicily, Italy Retrace season two of The White ... many spas for a massage, followed by a **trip** to a local vineyard or bar to taste local...

published on 14/12/22 at 15:34 | Magazine | Australia | www.lonelyplanet.com

### Greek street food in Athens, Greece - INSANE ROASTED MEAT + Greek street food tour in Athens, Greece

...street **food** tour in Athens where we gonna **eat** the most incredibly **delicious food** in **Greece**. To start our Greek street **food** ... t **food** tour in Athens, **Greece**, we went to a local farmer's market to try and buy some **food**. To end our Greek street **food**...

published on 20/11/22 at 15:00 | YouTube | United States | youtube.com

### Thessaloniki's gastronomy

THESSALONIKIThessaloniki's **gastronomy** A **culinary** paradise! Thessaloniki's **cuisine** is widely known for its quality and ... influences, Thessaloniki's **cuisine** is one of the richest in **Greece**. Traditional recipes as well as modern trends have...

published on 30/10/22 at 17:02 | Online News Other | Greece | www.visitgreece.gr

### Florina: The Winter Fairyland in Northern Greece

...**Greece** forever. Most of the cities in northern **Greece** have fortunately managed to maintain their traditional **architecture**... Christmas is definitely Florina's peak **tourist** season since it offers its fortunate **visitors** a wide range of options for...

published on 17/11/22 at 10:45 | Online News Other | United States | greekreporter.com

### Unknown Crete: mountain villages in the hinterland.

Significant archaeological finds, e.g. B. bronze statues are in the archaeological **museums** in **Athens** and Heraklion. Today there is a stone chapel on the hill dedicated to Timion Stavron, ie the Uplifted Cross. At the 14th...

published on 02/12/22 at 02:00 | Blogs | Germany | radio-kreta.de

4th Quarter 2022

# Illustrative Social Posts

## Reflecting the Positive Sentiment

### Greece. Antiquity is exhibited in the metro

On October 10, in **Athens** , the Greek Prime Minister inaugurated the brand new Dimotiko Theatro station in Piraeus. The opportunity to discover an **exhibition** that highlights the incredible hydraulic system dating from...

published on 25/11/22 at 09:56 | Blogs | France | www.lettreducheminot.fr

### 14 Best Vegan Restaurants Around The World

...and winner of a 2022 Tripadvisor **Travelers** Choice Award in **Athens** just happens to be 100% vegan. Vegan Beet, a small street ... Mediterranean cuisine with modern cross-**cultural** street foods. From sweet potato burgers to mushroom gyros, Vegan Beat...

published on 17/11/22 at 20:14 | Blogs | United States | www.tastingtable.com

### After a record summer, a step forward towards sustainable tourism in Greece

... **sustainable tourism** The increase in **tourist** flows has raised serious concerns within the **tourism** industry ... average **stay** , also through other actions to help the **tourist** economy . **Plastira** Lake (on the left...

published on 11/10/22 at 10:18 | Online News Other | Greece | www.grecehebdo.gr

### The best affordable holiday destinations in Europe for 2023

...are wallet-**friendly** and fabulous **holidays** to be had. Here are 10 of the most affordable... Athens, **Greece** The Greek ... terracotta-hued villages. But not pricing. **Holidays** in unsung Marche are comparatively inexpensive, with chic hotels coming...

published on 25/11/22 at 13:44 | Newspaper | United Kingdom | www.standard.co.uk

### Sports festivities for the 10 years of Navarino Challenge

...this year's top world sports **tourism** event Europe's top sports **tourism** and wellness event, Navarino Challenge, celebrated... pi3 was the **Sustainability** Partner. SKAI was the Premium TV Partner. Deree - The American College of **Greece** was the...

published on 01/11/22 at 14:32 | Online News Other | Greece | www.tornosnews.gr

### Greece Investor Guide

**Greece** has taken a big step in reducing its **plastic** usage and boosting **sustainability** in the **tourism** industry! **Greece**'s Minister of **Tourism**, @Vkikilias, and EOT President, Dimitris Fragakis, have signed a Memorandum of Cooperation with the Common Seas Organisation to pic.twitter.com/DhJFArNK9j

published on 11/11/22 at 12:40 | Twitter | Greece | twitter.com

### The 14 best all-inclusive holidays for autumn and winter, and why they are anything but bland

...**Greece** Local soul This family-**friendly** five-star is very much a part of its namesake town (above) in north-western **Greece** ... abandoned "ghost town" of Kayaköy and shopping **trips** to Fethiye bazaar via the resort's beautiful sailing boat. For the past...

published on 15/10/22 at 08:00 | Blogs | United Kingdom | inews.co.uk

### Hidden Guest: Vanoro Hotel Thessaloniki

...Europe even in high season. As the second largest in **Greece**, the airport is modern and **traveller-friendly**. Regular bus connections take **visitors** to the city. If one decides on a taxi, the price will range from 20 to 30 EUR. Guests arriving by car...

published on 19/11/22 at 17:59 | Blogs | Slovenia | kongres-magazine.eu

# Negative Sentiment Drivers

## What vigilance points to watch reputation-wise?

Despite the decrease compared to the 3rd quarter, **negative content is somewhat present in the 4th**. Some are directly related to tourism such as the use of animals as a means of transport, pickpockets, and travel scams. Other negative content is not as directly related to tourism, including extreme weather, geopolitical issues, and inflation.

*Examples of reputation drivers…*

The 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' minds.

- Issues related to **the use of animals as a means of transport for holidaymakers** (e.g., donkey)
- **A hurricane-like storm** hit Greece
- **Extreme heat recorded** in Greece in early October
- **International travelers targeted by pickpockets** in Athens
- **Digital travel scam s on the rise**
- **Geopolitical issues with Turkey** (Turkey's threat over military attacks on the Greek islands, etc.)
- Greek bakers' **financial struggles** due to **inflation** and **energy crisis**

# Illustrative Social Posts

## Reflecting the Negative Sentiment

### Donkey torture on vacation: please do not participate!

...TIERFABRIKEN would like to enlighten **vacationers** ! The little donkeys have to spend hours walking **tourists through** the ...

published on 20/10/22 at 06:22 | Online News Other | Austria | vgt.at

### Heavy snowfall with hail in Greece! Heavenly stones fell on Athens! Wind will progress!

A rare hurricane-like storm has hit western **Greece** with hail, disrupting **travel** and causing flooding and power outages on several Ionian islands. The storm was expected to head south after making landfall in the...

published on 02/10/22 at 11:00 | YouTube | United States | youtube.com

### Warning of extreme heat to holidaymakers headed to Greece or Turkey this October half term

...and **Greece** have all seen very high temperatures over the weekend, with the mercury sizzling to over 40C in the **holiday**...

published on 04/10/22 at 21:25 | Newspaper | United Kingdom | www.chroniclelive.co.uk

### ...to our Airbnb': Singapore traveller to Athens targeted by pickpockets twice in 24 hours, Lifestyle...

...sticky fingers of pickpockets while **travelling** in **Athens**, **Greece**. And it didn't happen just once, but twice within 24 ... similar experiences while **travelling** in Europe, with one sharing that **travellers** to **Greece** should also be wary of the ol'...

published on 14/12/22 at 09:10 | Online News Other | Singapore | www.asiaone.com

### Holiday swindlers: The rise of digital travel scams

...**holiday** herself, but he replied that there were **trips** for every budget, and she ended up booking a dream **holiday** to **Greece** ... date. David called the **travel** agent and asked him to book a different hotel in **Athens** for the group, which he agreed to do...

published on 24/11/22 at 01:11 | TV/Radio | United Kingdom | www.bbc.com

### Greece: Dozens feared dead after boats of asylums seekers sink

...Picture: AP) Most of those reaching **Greece travel** from neighbouring Turkey, but smugglers have changed routes in recent...

published on 06/10/22 at 10:07 | Newspaper | United Kingdom | metro.co.uk

### Scholz defends Greece from Turkish threats

...Paris in **Athens** . Mitsotakis first wanted to show him the Acropolis, the biggest **tourist attraction** in...

published on 27/10/22 at 08:46 | Online News Other | Germany | www.businessinsider.de

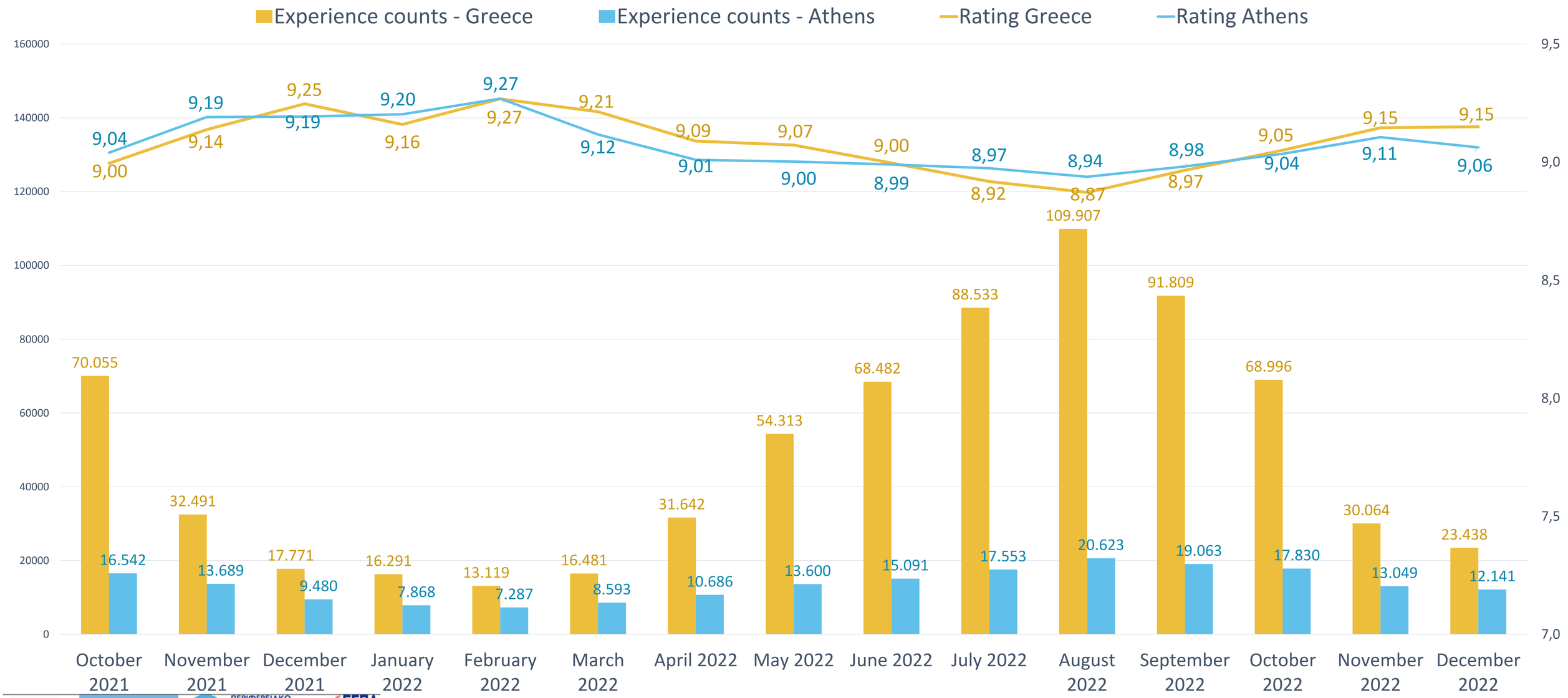
### Greek bakers, confectioners struggling to make ends meet amidst energy crisis

...the upcoming **holiday** season to cover some of the losses of recent months. **Greece**'s annual **inflation** rate increased to 12 ... Authority (ELSTAT). The **increase** is primarily linked to the **rise** in energy **costs** over the past year. Natural gas prices...

published on 09/11/22 at 19:12 | Online News Other | China | english.news.cn

# Destination Experience Reputation

# Overall Experience Reputation Trends



# Experience Reputation Dashboard (Greece)

GREECE

4th Quarter 2022

## Overall Rating:

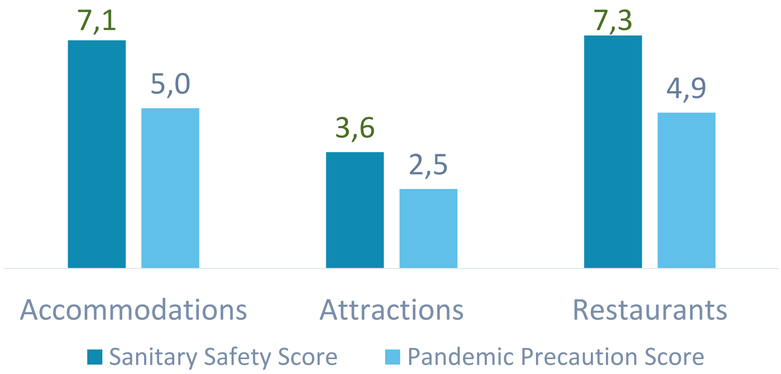
**9,09**

***Europe Benchmark: 8,65***

*Athens: 9,06 / Seaside: 9,04 / Other: 9,22*

## Sanitary Safety Score(*)

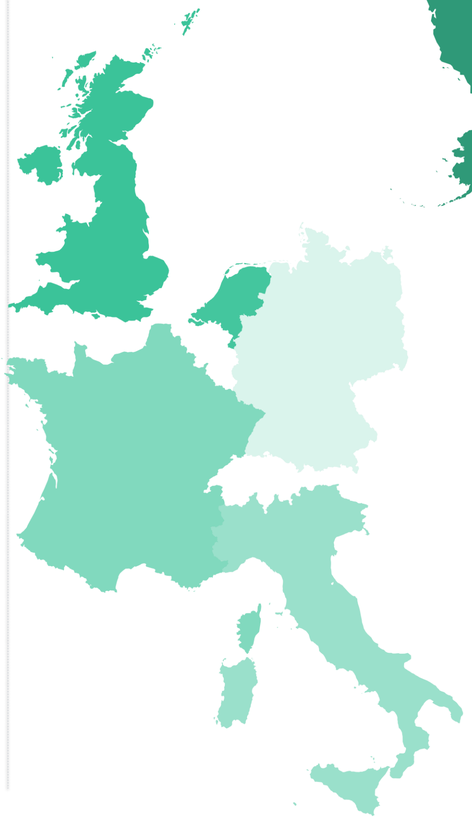
## Pandemic Precautions Score(*)

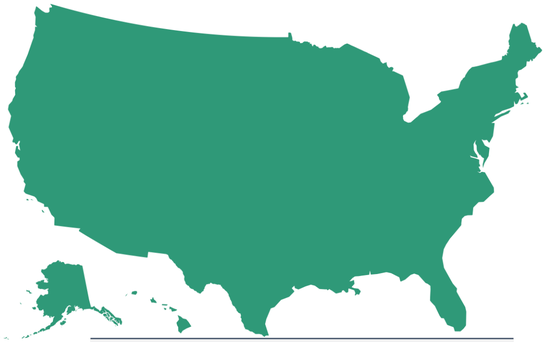



**Value for Money: 8,8 / *Europe avg: 8,3***

**Sustainable Travel: 8,0 / *Europe avg: 8,0***

## Rating per market





| | Rating (/10) | Reviews count |
|---|---|---|
| USA | 9,15 | 2407 |
| UK | 8,73 | 4650 |
| France | 8,62 | 1755 |
| Italy | 8,58 | 929 |
| Netherlands | 8,50 | 650 |
| Germany | 8,48 | 1741 |

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

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

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# Experience Reputation Dashboard (Athens)

ATHENS

4th Quarter 2022

## Overall Rating:

**9,06**

***Europe Benchmark: 8,65***

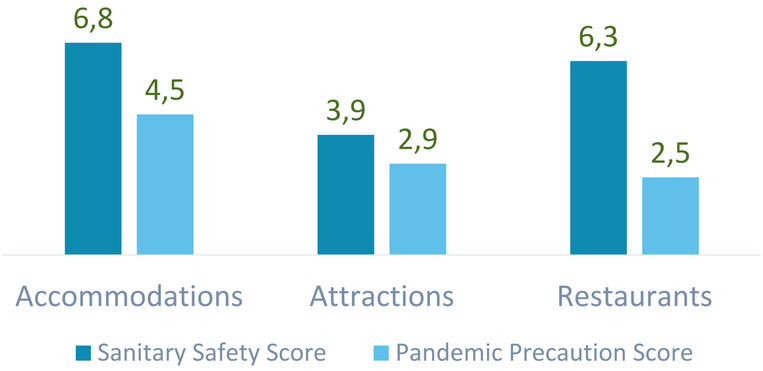
*Greece: 9,09 / Seaside: 9,04 / Other: 9,22*

## Sanitary Safety Score(*)

Greece Avg. : 6,5

## Pandemic Precautions Score(*)

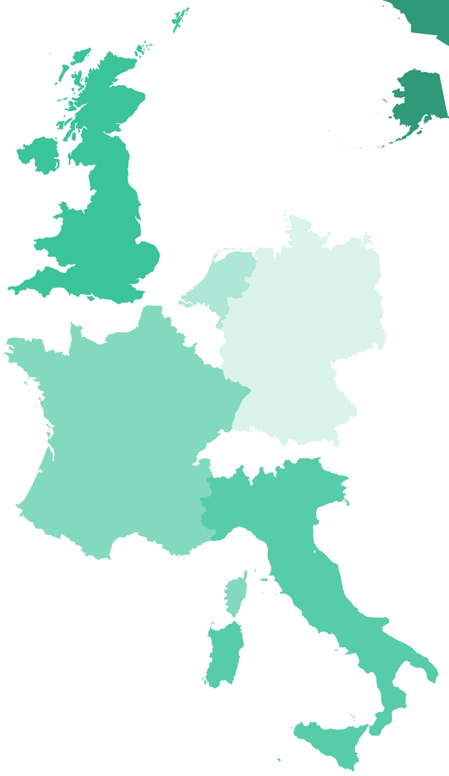
Greece Avg. : 3,7

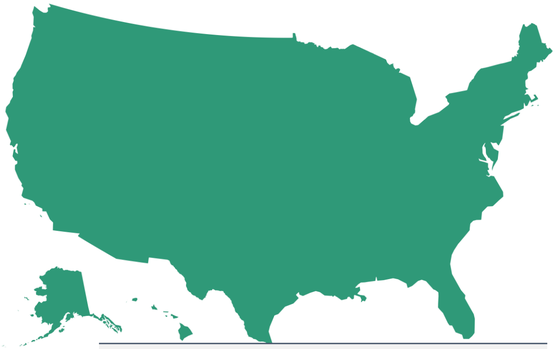



**Value for Money: 9,0 / *Europe avg: 8,3***

**Sustainable Travel: 8,5 / *Europe avg: 8,0***

## Rating per market





| | Rating | Reviews count |
|---|---|---|
| USA | 9,10 | 1484 |
| UK | 8,60 | 1011 |
| Italy | 8,53 | 489 |
| France | 8,42 | 555 |
| Netherlands | 8,31 | 253 |
| Germany | 8,20 | 488 |

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

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

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SEASIDE

# Experience Reputation Dashboard (Seaside)

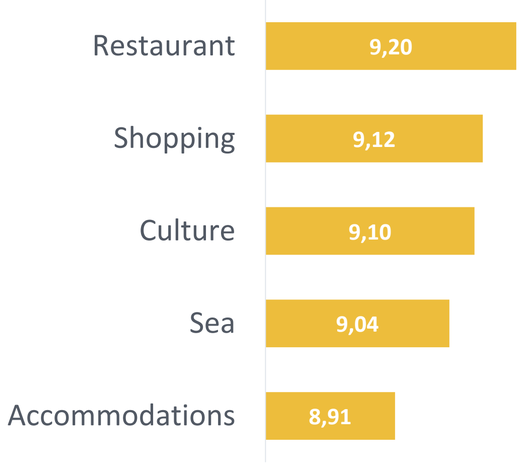
4th Quarter 2022

## Overall Rating:

**9,04**

***Europe Benchmark: 8,65***

*Greece: 9,09 / Athens: 9,06 / Other: 9,22*

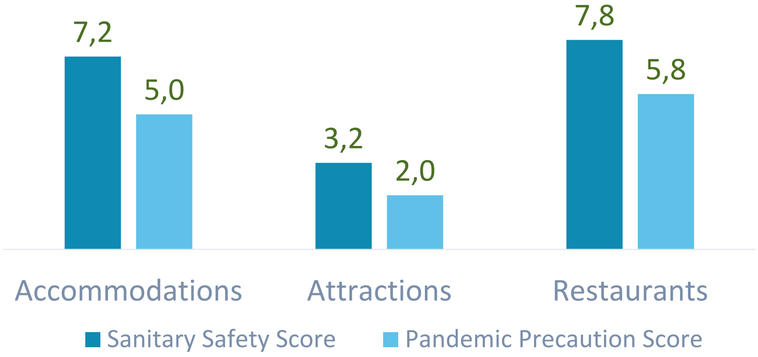



## Sanitary Safety Score(*)

Greece Avg. : 6,5

## Pandemic Precautions Score(*)

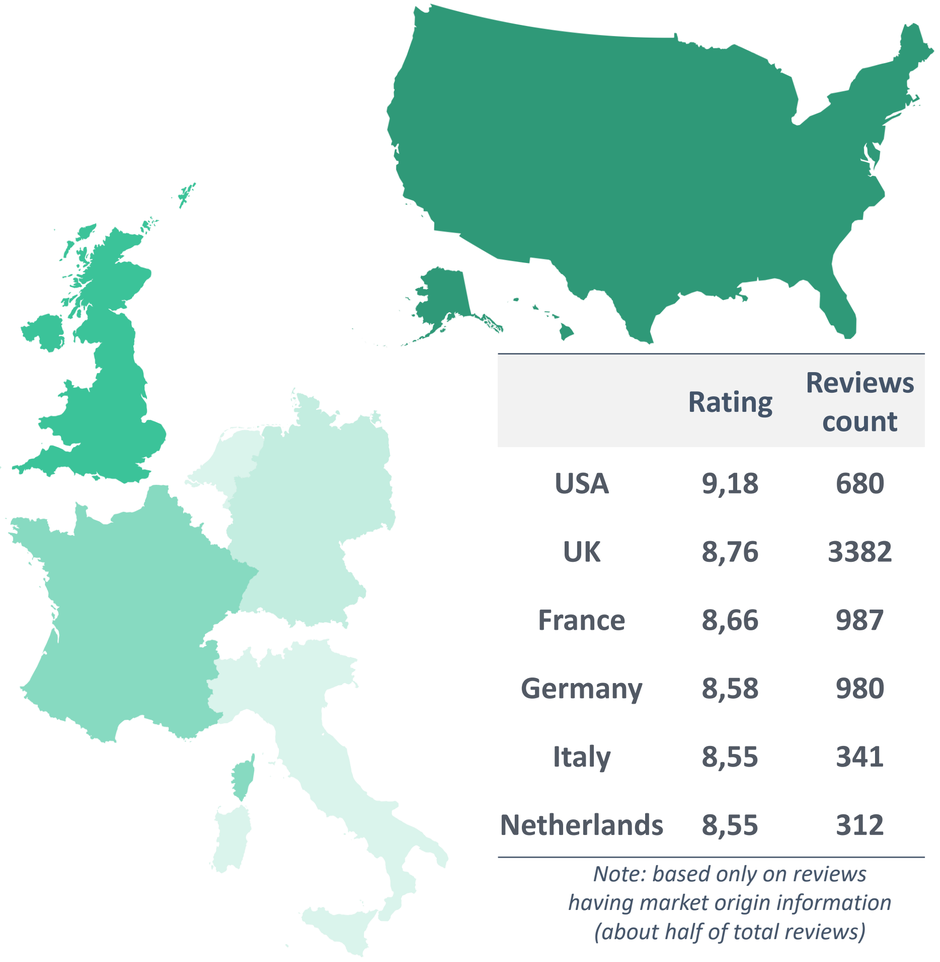
Greece Avg. : 3,7




**Value for Money: 8,8 / *Europe avg: 8,3***

**Sustainable Travel: 7,8 / *Europe avg: 8,0***

## Rating per market



| | Rating | Reviews count |
|---|---|---|
| USA | 9,18 | 680 |
| UK | 8,76 | 3382 |
| France | 8,66 | 987 |
| Germany | 8,58 | 980 |
| Italy | 8,55 | 341 |
| Netherlands | 8,55 | 312 |

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

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

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ΑΘΗΝΑ
ΠΕΡΙΦΕΡΕΙΑΚΟ ΕΠΙΧΕΙΡΗΣΙΑΚΟ ΠΡΟΓΡΑΜΜΑ ΑΤΤΙΚΗΣ
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OTHER AREAS

# Experience Reputation Dashboard (Other areas)

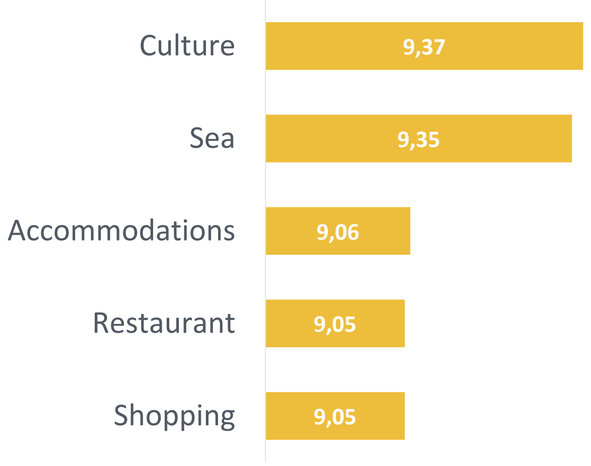
4th Quarter 2022

## Overall Rating:

**9,22**

***Europe Benchmark: 8,65***

*Greece: 9,09 / Athens: 9,06 / Seaside: 9,04*

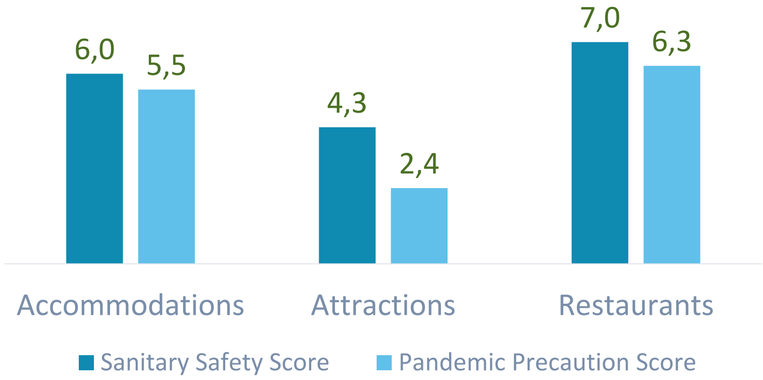



## Sanitary Safety Score(*)

Greece Avg. : 6,5

## Pandemic Precautions Score(*)

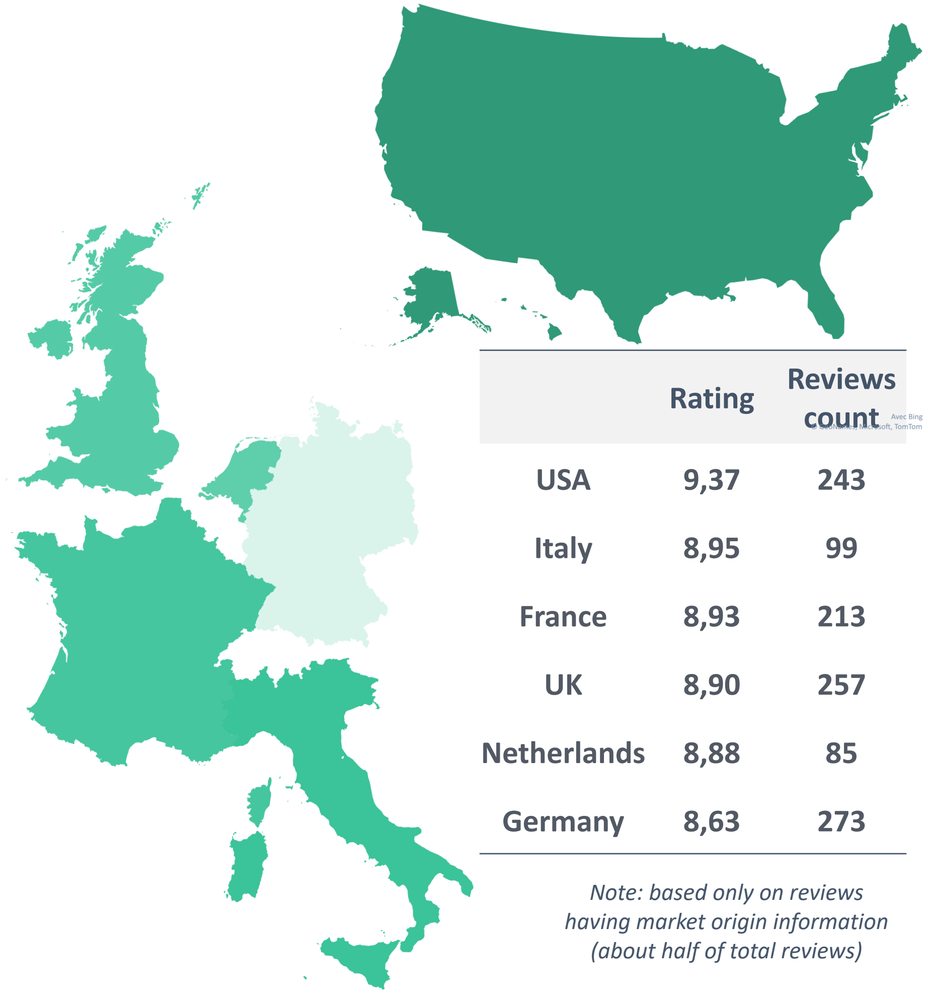
Greece Avg. : 3,7




**Value for Money: 9,0 / *Europe avg: 8,3***

**Sustainable Travel: 9,0 / *Europe avg: 8,0***

## Rating per market



| | Rating | Reviews count |
|---|---|---|
| USA | 9,37 | 243 |
| Italy | 8,95 | 99 |
| France | 8,93 | 213 |
| UK | 8,90 | 257 |
| Netherlands | 8,88 | 85 |
| Germany | 8,63 | 273 |

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

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

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Ευρωπαϊκή Ένωση · Δήμος Αθηναίων · ΑΘΗΝΑ · Περιφερειακό Επιχειρησιακό Πρόγραμμα Αττικής · ΕΣΠΑ 2014-2020

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# Experience Reputation Dashboard Summary

4th Quarter 2022

| 4th Quarter 2022 | Greece | Evol. Q3/Q4 | Athens | Evol. Q3/Q4 | S&B | Evol. Q3/Q4 | Other | Evol. Q3/Q4 | Europe | Evol. Q3/Q4 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Overall Rating** | **9.09** | ***0.18*** | **9.06** | ***0.10*** | **9.04** | ***0.21*** | **9.22** | ***0.09*** | **8.65** | ***0.10*** |
| Culture | 9.37 | *0.13* | 9.51 | *0.09* | 9.10 | *0.03* | 9.37 | *0.11* | | |
| Restaurants | 9.07 | *0.05* | 8.94 | *0.01* | 9.20 | *0.18* | 9.05 | *-0.12* | | |
| Sea | 9.11 | *0.31* | 9.33 | *0.20* | 9.04 | *0.27* | 9.35 | *0.44* | | |
| Shopping | 8.94 | *-0.01* | 8.88 | *0.04* | 9.12 | *-0.07* | 9.05 | *0.00* | | |
| Accommodations | 8.87 | *0.26* | 8.71 | *0.20* | 8.91 | *0.33* | 9.06 | *0.21* | | |
| | | | | | | | | | | |
| **Sanitary Safety** | **6.46** | ***1.34*** | **5.39** | ***0.25*** | **6.79** | ***1.61*** | **5.21** | ***0.78*** | | |
| **Pandemic Precautions** | **3.76** | ***0.58*** | **3.19** | ***0.29*** | **4.10** | ***0.79*** | **3.13** | ***0.83*** | | |
| Accommodation - Sanitary Safety | 7.12 | *0.89* | 6.84 | *0.77* | 7.20 | *0.96* | 6.00 | *-0.37* | | |
| Accommodation - Pandemic Precautions | 5.00 | *0.23* | 4.53 | *1.20* | 5.04 | *0.04* | 5.50 | *2.73* | | |
| Attractions - Sanitary Safety | 3.63 | *1.03* | 3.87 | *-0.10* | 3.23 | *0.93* | 4.31 | *1.54* | | |
| Attractions - Pandemic Precautions | 2.48 | *0.45* | 2.94 | *0.19* | 2.02 | *0.17* | 2.39 | *0.26* | | |
| Restaurants - Sanitary Safety | 7.27 | *1.37* | 6.25 | *0.32* | 7.82 | *1.82* | 7.00 | *2.42* | | |
| Restaurants - Pandemic Precautions | 4.86 | *1.75* | 2.50 | *-0.39* | 5.80 | *2.55* | 6.25 | *3.86* | | |
| ***Sanitary/Pandemic vigilance threshold is usually defined at 5/10*** | | | | | | | | | | |
| **Overall Rating** | **9.09** | ***0.18*** | **9.06** | ***0.10*** | **9.04** | ***0.21*** | **9.22** | ***0.09*** | **8.65** | ***0.10*** |
| USA | 9.15 | *0.05* | 9.10 | *0.04* | 9.18 | *0.04* | 9.37 | *0.19* | | |
| UK | 8.73 | *0.21* | 8.60 | *0.13* | 8.76 | *0.24* | 8.90 | *0.15* | | |
| NL | 8.50 | *0.10* | 8.31 | *0.07* | 8.55 | *0.12* | 8.88 | *0.36* | | |
| DE | 8.48 | *0.12* | 8.20 | *-0.03* | 8.58 | *0.25* | 8.63 | *0.01* | | |
| FR | 8.62 | *0.31* | 8.42 | *0.16* | 8.66 | *0.41* | 8.93 | *0.23* | | |
| IT | 8.58 | *0.22* | 8.53 | *0.25* | 8.55 | *0.19* | 8.95 | *0.43* | | |

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

# KEY REVIEWS TRENDS - SUMMARY



## Quarter 4 - 2022

- The starting **decline in number of reviews** at the end of the 3rd quarter **continued for both Greece and Athens in the 4th quarter**. At the same time, **overall ratings for Greece and Athens increased compared to Q3**. Although a slight decline is seen for Athens in the month of December, ratings are still higher than the previous quarter.
- Along with the increase in ratings, **Greece's overall score remains well above the European benchmark** (+0,44 points). **Almost all categories in Greece's offer have increased in Q3**, with the exception of a very small decline for shopping (-0.01 vs Q3).
- **Greece's offer in cultural and seaside activities are rated highest this quarter**. The **Sanitary Safety** and **Pandemic Precaution** scores **have increased overall**, with the former being over the vigilance threshold. While **Sanitary Safety is above 5 points for Accommodation and Restaurants**, Attractions is below.
- A similar pattern is seen across the different areas of Greece, **with all of their overall scores rising since Q3 and being above the European norm**. While culture and seaside activities are rated highest in Athens and other areas, restaurants and shopping hold the highest visitor satisfaction at the Seaside. Moreover, the same pattern that is seen with regards to Sanitary Safety and Pandemic Precaution Scores is seen in Greece's tourism areas, **with Accommodations and Restaurants holding generally higher scores than Attractions**.
- **Value for Money scores are above the European average for Greece as a whole**, as is the case for all of its areas, a very positive result in the context if economic inflation. The Sustainable Travel score for Greece sits at the same level as that of Europe, with **Athens and other areas being above the norm**.
- When it comes to ratings per market, **there has been an upward trend for almost all markets across all Greek regions monitored**. The sole exception is the score for the German market in Athens, which has only slightly reduced by 0.03 points since Q3.
- **Visitors coming from the United States tend to leave the highest ratings in general**, followed by the UK in Athens and the Seaside, and by Italy for the other regions monitored in Greece.

# Toplines

# TAKE-AWAYS

**Quarter 4 - 2022**

1. The 4th quarter of 2022 has been **marked by an increase in Greece's sentiment polarity**. **The same pattern is seen in Athens**. As such, **the overall Net Sentiment Score** of Greece for the 4th quarter **stands above that of Italy and Spain.** Additionally, **Athens' overall NSI outperforms all other competing destinations' scores** for the same time span.
2. **The general increase in NSI scores is seen across all of Greece's and Athens' markets**, **notably so in the UK and French markets**. Moreover, there has been **an increase in score for almost all conversation topics**, with hospitality, culture, and gastronomy holding particularly high scores.
3. In line with other findings **social conversations about Greece have been very positive**, **reflecting its offer for Autumns and Winter travel plans**. A large degree of topics have been around Greece's offer of culture and food, attracting a lot of engagement from potential visitors.
4. In line with the results seen for Greece's and Athens' NSI scores, **overall ratings have increased compared to the 3rd quarter for both**. Simultaneously, visitation has decreased, as is often the case after the busier summer months of the Q3.
5. **Both Greece's overall rating score**, **and that of its separate tourism areas are all higher than the average in Europe**. The highest score can be seen in Greece's other inland areas, followed by that of Athens. Additionally, Greece's offer in cultural and seaside activities are rated highest in the 4th quarter.
6. With regards to specific indicators, **Sanitary Safety scores are above the 5-point threshold for the Accommodation and Restaurants verticals**, while it is below for Attractions. At the same time, **Value for Money scores are above the European average for Greece as a whole**, **as well as for all of its tourism areas**, a positive result in the context of economic inflation.
7. Finally, as is reflected in Greece's sentiment at large, **ratings per market have increased for the majority of markets across all of its monitored regions**. Visitors from the United States are once again likely to leave the highest ratings.

Ευρωπαϊκή Ένωση
Ευρωπαϊκό Ταμείο Περιφερειακής Ανάπτυξης
ΔΗΜΟΣ ΑΘΗΝΑΙΩΝ
ΑΘΗΝΑ
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ΕΣΠΑ 2014-2020
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