



# Εισαγωγή

- Το ΙΝΣΕΤΕ, στο πλαίσιο παρακολούθησης της τουριστικής δραστηριότητας μέσα από διαφοροποιημένες πηγές, συνεργάζεται με την εταιρεία ΤΟΙ Research (που πλέον αποτελεί τμήμα της εταιρείας MMGY) σχετικά με τη συλλογή big data για την Ελλάδα και ανταγωνιστικούς προορισμούς (Ιταλία, Ισπανία, Πορτογαλία, Κροατία) επιτρέποντας τη σύγκριση της συνολικής εικόνας της χώρας και της Αθήνας με τον ανταγωνισμό.
- Περαιτέρω, η έκθεση είναι πλέον εμπλουτισμένη με στοιχεία και για τις 13 Περιφέρειες της χώρας, που αποτυπώνουν την τουριστική εμπειρία ως προς την εστίαση και τα αξιοθέατα. Στα πλαίσια της ανάλυσης έχουν αξιολογηθεί 220 χιλ. σχόλια για αξιοθέατα (attractions) και 138 χιλ. για εστιατόρια / bar στην Ελλάδα και 7,7 εκατ. και 12,9 εκατ. αντίστοιχα για ανταγωνιστικούς προορισμούς.





# Κύρια Σημεία

· Σύμφωνα με την ανάλυση για το 3ο τρίμηνο του 2023 (Q3), τα κύρια σημεία έχουν ως εξής:

Με βάση την ανάλυση στοιχείων από το διαδίκτυο και τα Μέσα Κοινωνικής Δικτύωσης, η συνολική φήμη της χώρας επηρεάστηκε από καιρικά φαινόμενα που οφείλονται στην κλιματική αλλαγή, αλλά σημαντικά συστατικά του τουριστικού προϊόντος, όπως η γαστρονομία και ο πολιτισμός διατηρούν μακροχρόνια και σταθερά θετική επίδραση στις διαδικτυακές συζητήσεις. Συγκεκριμένα:

- Οι εξαιρετικά υψηλές θερμοκρασίες κατά τη διάρκεια του καλοκαιριού και οι επακόλουθες πυρκαγιές επηρέασαν τον δείκτη Net Sentiment Index-NSI της Ελλάδας και της Αθήνας ο οποίος σημείωσε πτώση κατά 24 μονάδες τον Ιούλιο του 2023. Τον Αύγουστο, ο δείκτης NSI στην Ελλάδα ανέκαμψε θεαματικά στις +18 μονάδες. Ωστόσο, η βαθμολογία παρουσίασε και πάλι μικρή μείωση τον Σεπτέμβριο, η οποία αποδίδεται σε μεγάλο βαθμό στις πλημμύρες που σημειώθηκαν.
- Αναλογικά, καθώς το ποσοστό των συζητήσεων στο διαδίκτυο για τις πυρκαγιές στο σύνολο των συζητήσεων που σχετίζονται με ταξίδια στην Ελλάδα από 31% τον Ιούλιο, μειώθηκε σε 13% τον Αύγουστο και σε 7% τον Σεπτέμβριο, αναμένεται ανάκαμψη του NSI το Q4. Όσον αφορά τις διαδικτυακές συζητήσεις που σχετίζονται με τις πλημμύρες, αντιπροσώπευαν το 7% του συνόλου των συνομιλιών τον Σεπτέμβριο. Συνεπώς, καταγράφεται μείωση της φήμης στην κατηγορία περιβάλλον, η οποία οφείλεται κυρίως, στις ανησυχίες που σχετίζονται με την κλιματική αλλαγή. Συνολικά, η γενική εικόνα της Ελλάδας και της Αθήνας το τρίτο τρίμηνο υστέρησε έναντι των ανταγωνιστικών χωρών (Ισπανία, Ιταλία, Πορτογαλία, Κροατία).
- Εμβαθύνοντας σε συγκεκριμένα θέματα φήμης, είναι αξιοσημείωτο ότι ο πολιτισμός και η γαστρονομία διατηρούν μακροχρόνια και σταθερά θετική επίδραση στις διαδικτυακές συζητήσεις. Επίσης, θετική επίδραση στη φήμη της χώρας καταγράφηκε από αναφορές σε σχέση με τα αξιοθέατα και το εισαχθέν σύστημα ζωνών επισκεψιμότητας της Ακρόπολης, τα καταλύματα που δίνουν έμφαση στην ευεξία, και την αυξανόμενη προτίμηση των ταξιδιωτών ως προς τις προσφερόμενες χορτοφαγικές επιλογές.
- Στα αρνητικά σημεία περιλαμβάνονται σχόλια για τη διαχείριση των ζώων, τα παράπονα κατά του Airbnb και των επιπτώσεών του στα ενοίκια των σπιτιών σε γειτονιές που υπάρχουν πολλά καταλύματα βραχυχρόνιας μίσθωσης.







# Κύρια Σημεία

• Οι πρωτοβουλίες για **τη βιωσιμότητα και την ενίσχυση λιγότερο γνωστών προορισμών διατηρούν την ελκυστικότητά ως κατηγορία περιεχομένου** στις διαδικτυακές συζητήσεις. Επιπλέον, κατά τη διάρκεια του τριμήνου καταγράφηκαν θετικές αναφορές για διάφορους προορισμούς της Ελλάδας. Για παράδειγμα η Πελοπόννησος αναφέρθηκε ως ιδανική επιλογή για όσους ταξιδιώτες αναζητούν πιο ήσυχους και λιγότερο γνωστούς προορισμούς.

Με βάση τα στοιχεία σε τουριστικά sites (online travel agents, travel review sites κλπ.), η εμπειρία των τουριστών στη χώρα είναι ιδιαίτερα υψηλή και ανταγωνιστική, παρά την κάμψη που παρατηρείται τους μήνες αιχμής. Συγκεκριμένα:

- Η τουριστική εμπειρία στην Ελλάδα διατηρεί μια ιδιαίτερα ανταγωνιστική συνολική βαθμολογία (9,1) σε σύγκριση με τον ευρωπαϊκό μέσο όρο (8,6). Αυτό ισχύει για όλες τις ελληνικές Περιφέρειες, καθεμία από τις οποίες έχει βαθμολογία άνω του 9,0, εκτός από τα νησιά του Βόρειου Αιγαίου (8,8) και τις Κυκλάδες (8,9).
- Οι αξιολογήσεις ως προς την πολιτιστική εμπειρία έλαβαν την υψηλότερη βαθμολογία, με βαθμολογία 9,3 και ακολουθούν η γαστρονομία (9,0) και η εμπειρία θάλασσα (8,8). Αυτό το μοτίβο ήταν παρόμοιο στους περισσότερους προορισμούς με επαρκή όγκο αξιολογήσεων προς ανάλυση. Ωστόσο, στην Κρήτη, η γαστρονομία έλαβε υψηλότερη βαθμολογία από τις πολιτιστικές εμπειρίες, ενώ στην Ήπειρο και την Πελοπόννησο, η εμπειρία στη θάλασσα κατέλαβε τη δεύτερη θέση στις αξιολογήσεις.
- Από την ανάλυση προκύπτει ότι **οι ταξιδιώτες στην Ελλάδα εκτιμούν πολύ το Προσωπικό**, αποδίδοντας εξαιρετική βαθμολογία, περί το 9,4 σχεδόν σε όλους τους προορισμούς.
- **Αρκετά ικανοποιητική βαθμολογία καταγράφεται επίσης και στη σχέση «ποιότητας-τιμής»** με βαθμολογία που σε όλες τις Περιφέρειες υπερβαίνει το 8,0 και συχνά αγγίζει ή υπερβαίνει και το 9,0.
- Όσον αφορά τα βιώσιμα ταξίδια, η συνολική εικόνα της χώρας είναι θετική (8,3) με τις περισσότερες Περιφέρειες να έχουν βαθμολογία μεγαλύτερη του 8 και μέγιστη βαθμολογία (9,1) στην Κεντρική Μακεδονία. Βαθμολογία μικρότερη του 8,0 σε αυτή τη διάσταση παρουσιάζουν οι Κυκλάδες (7,7) και η Θεσσαλία (6,9).

Period of analysis: July 1st, to September 30th, 2023.







# Κύρια Σημεία

- Παρόμοια τάση παρατηρείται για την υγιεινή (8,1 συνολικά), με βαθμολογίες 8,5 και άνω στην Κεντρική Μακεδονία, την Ήπειρο και την Ανατολική Μακεδονία και Θράκη. Βαθμολογία μικρότερη από 8,0 καταγράφεται στην Θεσσαλία, τα Ιόνια Νησιά, το Βόρειο Αιγαίο και την Κρήτη.
- Εξετάζοντας τις αξιολογήσεις ανά αγορά, υπάρχει σταθερός αριθμός αξιολογήσεων στις έξι κύριες αγορές, με αξιοσημείωτο όγκο από τις ΗΠΑ, το Ηνωμένο Βασίλειο και την Ιταλία. Οι ταξιδιώτες από τις ΗΠΑ και το Ηνωμένο Βασίλειο παρέχουν σταθερά τις υψηλότερες συνολικές αξιολογήσεις, με τους Ολλανδούς και τους Γερμανούς επισκέπτες να ακολουθούν. Ωστόσο, είναι σημαντικό να σημειωθεί ότι ο αριθμός των κριτικών και οι κατατάξεις διαφέρουν σημαντικά από περιοχή σε περιοχή.
- Ενδεικτικά, οι ταξιδιώτες από ΗΠΑ και Γαλλία δίνουν την υψηλότερη βαθμολογία στην Ήπειρο (9,8 και 9,6 αντίστοιχα), από το Ηνωμένο Βασίλειο (10) στην Στερεά Ελλάδα, και από την Ιταλία και την Ολλανδία (9,2 και οι δύο) στην Δυτική Ελλάδα, και οι ταξιδιώτες από τη Γερμανία στην Πελοπόννησο (9,5).





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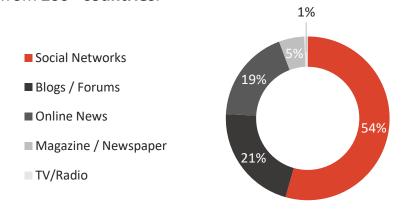


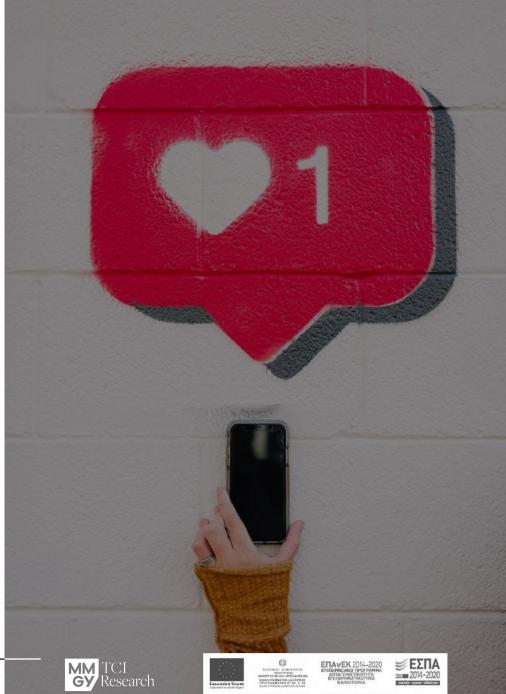
## **Sentiment Tracker**

METHODOLOGICAL OVERVIEW OF DESTINATION REPUTATION AT LARGE

### **Analysing online social data**

- The "sentiment" reflects the state of travel brands' online reputation. These are seen through online social conversations at a global level.
- They are shared by differing media, consumers, companies, citizens, brands and officials on websites, forums, blogs & social networks.
- While sentiment is not predictive of travellers' planning, a positive e-reputation is essential to generate favourability towards destinations and travel brands, particularly when choosing a destination.
- In the past 12 months, Greece was mentioned 965K+ in social conversations in relation to travel, generating 13.3M engagements, shared by 201K+ unique authors from 200+ countries.







# **Key Sentiment Trends**

SUMMARY FOR THE THIRD QUARTER OF 2023

- Greece and Athens' Net Sentiment Index (NSI) experienced a substantial decline in July 2023. It is primarily attributed to extremely high temperatures during summer and the subsequent wildfires that swept across the country. Despite the similar trend among all Mediterranean benchmarks, it appears that the high focus on Greece made its polarity diminish more.
- The NSI in Greece displayed improvement in August, rebounding from -24 points in July to 18 points. However, the score experienced a slight dip once again in September, largely attributed to the floods that occurred. In terms of volume, the proportion of social conversations about wildfires in all travel-related conversations concerning Greece was 31% in July, decreasing to 13% in August, and further declining to 7% in September. Consequently, we anticipate a recovery in NSI in the upcoming quarter. Regarding conversations related to flooding, they accounted for 7% of the total conversations in September.
- Delving into specific reputation topics, it is noteworthy that **Culture** and **Food** maintain remarkable stability in terms of their social conversation volume. Nonetheless, the NSI fell below the usual standards in all reputation categories, mainly due to a general decline in overall sentiment. As a result, the most significant sentiment decrease was observed in the **Environment category**, driven largely by concerns related to climate change.
- Despite the drop in overall sentiment, online conversations consistently feature positive sides. This positivity spans across various areas, encompassing cultural highlights, such as the recently introduced Acropolis visitor zone system, accommodations emphasising wellness and comfort, and travellers' growing fascination with plant-based options besides traditional Greek food. Sustainable initiatives and the revitalisation of lesser-known destinations maintain their sustained appeal. In addition, various places in Greece were showcased throughout the quarter. One example is the **Peloponnese Peninsula**, which was described as an ideal destinations for those seeking guieter, lesser-known spots.
- In addition to the wildfires and heatwaves, it has also sparked online conversations about animal welfare concerns within the tourism industry. Furthermore, the issue of over tourism persists, as evidenced by complaints from Athens' residents regarding Airbnb rentals and their impact on surging real estate prices.

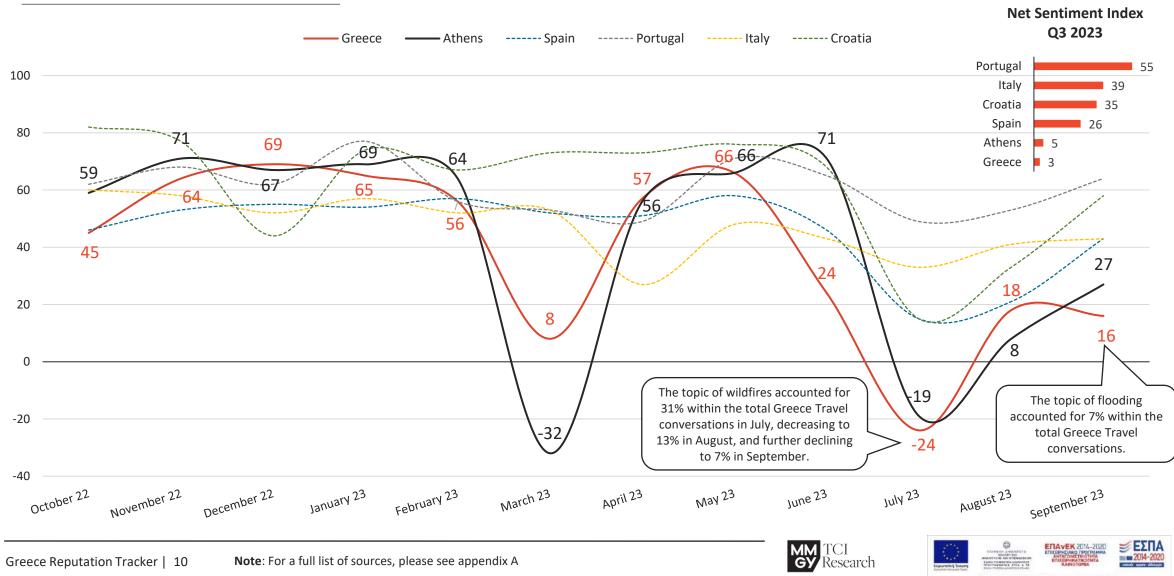






## **Net Sentiment Index**

TRENDS FOR GREECE'S ONLINE REPUTATION







# **Reputation Topics**

TRENDS FOR GREECE'S ONLINE REPUTATION

The **Culture** and **Food topics** have remained stable in terms of social conversation volume. However, **the NSI has been lower than its usual levels** for all topics, primarily due to the overarching decline in overall sentiment. What is particularly notable is the **decrease in sentiment concerning Environment**, predominantly steered by issues associated with climate change, resulting in a relatively low score of 15 points.



Period of analysis: July 1st, to September 30th, 2023.







## **Positive Sentiment Drivers**

STORIES FUELING GREECE'S SOCIAL REPUTATION

Regardless of sentiment trends, **positive content continues to be present** online as usual. Various subjects were covered, such as **cultural highlights**, including the recently implemented visitor zone system at the Acropolis, as well as **lodging experiences**, with a particular focus on wellness and comfort. Furthermore, travelers have shown an increasing curiosity in **plant-based food** and beverage options and **sustainability initiatives**.

### **Examples of reputation drivers**

- The Lykavittos open-air theatre in Athens has reopened and hosted a concert by Greek composer Stavros Xarchakos
- Special visitor zones were set up at the Acropolis to improve tourist management
- Tourists enjoyed an excellent, stress-free stay at TUI BLUE on the island of Zakynthos
- Staying at a keto retreat in Greece, savouring locally produced homemade food, and meeting nice people
- Exploring local grocery stores for vegan options, indulging in plant-based meals and drinks
- How to make Greek meat-free moussaka
- The Peloponnese peninsula is an ideal destination for those seeking a quieter, yet equally magnificent Greek experience with fewer crowds and breathtaking landscapes, both on land and along the seacoast

- Discovering Santorini's top 12 Beaches, from dramatic cliffside shores to nudist beaches
- **Discovering Greece in Autumn**, the Perfect Time to Visit (visiting wine-producing regions, kayaking along the coastline in milder temperatures, etc.)
- An Iranian tourist is delighted by the warm hospitality of the Greek people
- The Rio-Antirrio Bridge has brought several benefits, including enhanced accessibility, increased tourist flows, and a positive impact on property values
- Engagement of sustainable cruise social cooperative **Aegean Cargo Sailing**, playing a pivotal role in introducing tourists to Greece's lesserknown islands and fostering a deeper connection with local products
- 'Rocky' star Dolph Lundgren got married and enjoyed vacation in Mykonos

Period of analysis: July 1st, to September 30th, 2023.







## **Illustrative Social Posts**

#### STORIES REFLECTING POSITIVE SENTIMENT

#### Athens' Landmark Lykavittos Theater Reopens in September with Concert



...delivered to the residents and visitors of Athens with a wonderful festival. Returning from our holidays, the [Lykavittos Theater] festival will welcome us with a series of magical evenings," said Athens Mayor Kostas...

published on 21/08/23 at 14:29 Blogs Greece news.gtp.gr

#### New Visitor Zones to Ease Tourist Traffic at the Acropolis



.tourist attractions such as the Acropolis and the Parthenon, adding that the number of visitors to the UNESCO World Heritage ... implementation of visitor zones and the establishment of separate entry points for organized groups of tourists," said...

published on 06/07/23 at 15:00 Blogs Greece news.gtp.gr

#### Hand Luggage Only (handluggageonly) created a post



published on 03/08/23 at 17:53 TikTok United States tiktok.com



Just been on THE BEST KETO RETREAT EVER in Greece. Amazing home made, locally produced food. Daily cultural trips and swimming in the Mediterranean So much kindness and generosity!! Many new friends Thanks to @greekgoesketo @performit4 @apollokapsalis and @SBakerMD for company pic.twitter.com/tNjLPAftq2

published on 31/08/23 at 09:52 Twitter United Kingdom twitter.com

**Period of analysis**: July 1st, to September 30th, 2023.

#### what I eat in a week | eat & cook with me in Crete Greece! | Simple vegan travel meals ep.014 @ be \*\*



...domain using code juliaayers Hey friends and welcome to Crete Greece!! 6 This island has been my favourite place to be so far on this trip, it lights my heart up, makes me feel free, held, loved and home. Although Greek food isn't known for being...

published on 19/09/23 at 17:00 YouTube United States youtube.com

#### How to make the perfect vegan moussaka - recipe | Greek food and drink

Even in Greece, the 200-odd fasting days a year mandated by the Orthodox church mean that plant-based cuisine is more...

published on 09/08/23 at 13:00 Newspaper United Kingdom www.theguardian.com

### Greece's Peloponnese Peninsula Has Idyllic Coastlines, Stunning Beaches, and Almost No Crowds



...made from local grapes. As an A-List travel advisor, I can't recommend a trip to the Peloponnese peninsula enough. This diverse region showcases the best of mainland Greece, often with an island feel. I doubt I'll ever find another place that can...

published on 24/09/23 at 12:38 | Magazine | United States | www.travelandleisure.com

#### Between dream beaches and cultural visits: the best addresses in Paros, a secret island in the heart...

...its landscapes and the richness of its cultural heritage. And what could be better than discovering the island than being guided by those... wants that during the Queen Mother's trip to the Holy Land, the ship on which she was traveling was forced to... AZ

published on 25/07/23 at 17:49 Newspaper France madame.lefigaro.fr







## **Illustrative Social Posts**

#### STORIES REFLECTING POSITIVE SENTIMENT

#### The 12 Best Beaches in Santorini (Map Included)



discos and beach bars with chill-out **music**, and even nudists so, no matter the traveler you are, you will find a beach to your liking. Based on the experience of our trip to Greece, after which we wrote this route for...

published on 18/09/23 at 05:40 Blogs | Ireland | www.viajeroscallejeros.com

#### 7 Best Greek Islands for Couples (Romance, Relaxation, Sightseeing, etc)



..IN THESE TRAVEL TIPS, TRAVEL HACKS, TRAVEL ARTICLES, TRAVEL DESTINATIONS GUIDES, SOLO TRAVEL GUIDES, TRAVELER RESOURCES, AND ... Spain Travel Tips Road Trips Resources & Adventure Travel: Road Trip Packing List, Road Trip Tips, Road Trip Quotes & the...

published on 24/08/23 at 13:52 Blogs | Australia | maketimetoseetheworld.com

### Greece is even better in autumn - here's where to go

...in the 14 th century), Greece abounds in foodie feasts and gourmet festivals. Apart from the ones dedicated to the local ... holds the biggest chestnut festival in Greece. Book it: Athens-based luxury travel company Fly Me to the Moon (00 30...

published on 03/09/23 at 21:30 Online News Other United Kingdom www.telegraph.co.uk

### Iran Observer @ @IranObserver0 tweeted

Having traveled to Greece and Italy, I can say that these two countries are the most hospitable to Iranians.

published on 12/08/23 at 19:53 Twitter Iran twitter.com

#### The Rio-Antirrio Bridge: an Engineering Marvel that Changed Greece



...coming into the area from the north from the port of Patras. I ravelers heading for the Ionian Sea Jan Sea islands and areas in Central Greece can now easily and swiftly cross through the central area of the a of the country and back again. The study also noted that...

published on 01/08/23 at 15:11 Online News Other United States greekreporter.com

#### For an authentic taste of Greece, sail aboard a supply boat

...Greece's islands with Aegean Cargo Sailing, a social cooperative that blends sustainable cargo shipping with cultural tourism... " Here's how travelers can experience this newer way to explore Greece's agricultural and gastronomical revival. A return...

published on 08/09/23 at 18:57 Magazine United States www.nationalgeographic.com

### Enjoy a swimming cruise across the Athenian Riviera



...culinary expertise. Treat your taste buds to a gastronomic journey that will transport you to the heart of Greek cuisine ... experiences, culinary delights, and serene relaxation as you embark on an unforgettable day trip through the Saronic Gulf...

published on 05/08/23 at 01:07 Online News Other Greece www.tornosnews.gr

### 'Rocky' star Dolph Lundgren, 65, and Emma Krokdal, 25, seemingly get married in Greece



Lundgren, 65, was seen vacationing in Mykonos, Greece, with his two daughters Ida, 27, and Greta, 21, along with his ... wife, Krokdal, 25. During their luxurious holiday, Ida, shared highlights on her Instagram Story of what seemingly looks..

published on 14/07/23 at 18:37 TV/Radio United States www.foxnews.com

**Period of analysis**: July 1st, to September 30th, 2023.







# **Negative Sentiment Drivers**

GREECE'S VIGILANCE POINTS FOR ONLINE REPUTATION

Climate-related issues, including heatwaves, wildfires, and flooding, and the fact that the majority of wildfires were man-made, dominated the negative factors in the third quarter of 2023. On a related note, the exploitation of animals in the tourism industry during the heatwave drew attention to animal welfare concerns online. Additionally, over tourism remains a persistent issue, with complaints from Athen's residents about Airbnb rentals contributing to rising real estate prices.

### **Examples of reputation drivers**

- **Heatwaves** and wildfires that struck Greece: tourists and residents were required to evacuate the affected areas for their safety
- Greek official blames **negligence** or **arson** for majority of wildfires
- Flooding in September paralyzed mobility and caused damage on the major highway
- Incidences of animal exploitation, including donkeys being forced to carry tourists in Santorini during a heatwave and the tragic death of a carriage horse in the middle of the street in Corfu
- Athen's residents are filing complaints about **Airbnb rentals**, driving up real estate prices.
- Tourists in Greece can be fined for taking pebbles from beaches and wearing high heels







## **Illustrative Social Posts**

#### STORIES REFLECTING NEGATIVE SENTIMENT

#### Anonymous Citizen @AnonymeCitoyen shared a video



Scene of chaos in Rhodes, Greece . Crowds of hundreds of tourists and residents evacuate by road to get away from the out-of-control fires ravaging the island #Poδoς pic.twitter.com/1vUWNQq2IH

published on 22/07/23 at 16:18 Twitter France twitter.com

#### Most fires in Greece were started 'by human hand', government says

...carried out in Greece. A state of emergency was declared in some areas of the popular tourist destination earlier this...

published on 28/07/23 at 20:09 Online News Other United Kingdom www.theguardian.com



Travel between Greece's two largest cities is now impossible, both national rail and the country's main highway sustaining major damage. In Libya, the same storm has drowned several thousand. #ClimateCrisis #ClimateActionNow #Daniel pic.twitter.com/1sn4PIPqms

published on 12/09/23 at 18:37 Twitter Canada twitter.com



Donkeys in #Santorini were FORCED to carry tourists in Greece's longest heatwave. The blazing sun & lack of shade can lead them to heat stroke & death ppic.twitter.com/ckup0EkGUQ

SANTORINI ARE STILL BEINO USED AS TOURIST "TAXIS"

published on 27/07/23 at 01:23 Twitter United States twitter.com

Period of analysis: July 1st, to September 30th, 2023.

#### A carriage horse dies in the middle of the street in Corfu, "sacrificed on the altar of tourism"

...transport tourists . Read also: Holidays . In Greece , a summer without the Greeks "Sacrifice on the altar of tourism" or... of exploitation on several islands of Greece ". Alexandros Kottis Greece Tourism Society Europe Well-being...

published on 07/07/23 at 14:27 Newspaper France www.courrierinternational.com

#### Tourist Masses Are Overwhelming These European Hot Spots

Tourist Masses Are Overwhelming These European Hot Spots Italy, Spain and Greece are on track for a record-setting .. tourism season. Not everyone is happy about it. By Eric Sylvers July 14, 2023 Tap story

published on 14/07/23 at 23:29 Newspaper United States www.wsj.com



Tourists face fines for taking pebbles from beaches and wearing high heels in #Greece 2 #holiday #itvnews #news #travelling #foryou #uk

published on 13/07/23 at 17:41 TikTok United States tiktok.com







# **Ratings & Reviews**

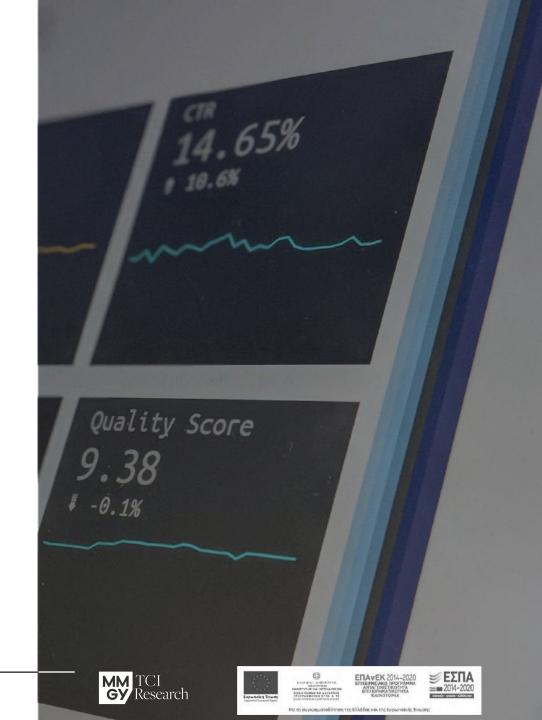
METHODOLOGICAL OVERVIEW

### **Consolidating ratings and reviews**

- TRAVELSAT<sup>©</sup> Pulse uses a solid **aggregation methodology to consolidate reviews**, both **numerical scores** and **written feedback**, from sources that cater to different aspects of the tourism ecosystem. It should be noted that not all ratings can be associated with specific markets.
- The platform presents all scores through a consolidated scale of 0-10. These have been converted from their original source and are weighted to adjust the significance that each source score has. Analyses are carried out across verticals, markets and guest profiles.

### Sentiment analysis technology

- Beyond structured ratings, written reviews are also analysed using the most developed sentiment lexicon. This allows for an analysis of positive and negative deflections by keywords by sub-category and guest profile.
- The AI semantic engine **covers 14 languages**: *Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish*. However, **ratings and reviews are collected for all sourcing markets** sharing their experience on the rating platforms.





# **Scope of Analysis**

DEFINING GREECE'S TOURISM ECOSYSTEM

### Sources connected to TRAVELSAT® Pulse

- The sources range from search engines with a review function, such as Google, to complete online travel agencies, like Trip Advisor and Booking.com. Currently having **45** sources connected<sup>1</sup>, 95% of all experience-based data available online is analysed.
- All rating platforms collect global data on the same KPIs, ensuring accuracy when comparing to other destinations. Benchmarking data is therefore be based on the largest Hospitality Datasets available.

### Sample definition & analysis period

- A sample of 1500 properties in Greece was randomly selected from its full Trip Advisor inventory to create a representative picture of Greece's tourism ecosystem.
- The current report analyses the third quarter of 2023, ranging from July 1<sup>st</sup>, to September 30<sup>th</sup>, 2023.

### **Reviews Corpus Analysed**

Verticals	Reviews Count Greece (01/07/2022 to 30/09/2023)	Reviews Count Benchmark (01/07/2022 to 30/09/2023)
Attractions	220,107	7,731,411
Restaurants	138,183	12,855,559
Total Sample	358,290	20,586,970

Note: The benchmark is composed of several representative European destinations.







# **Key Reviews Trends**

SUMMARY FOR THE THIRD QUARTER OF 2023

- During the third quarter of 2023, the number of reviews continued to increase, reaching its peak in August, followed by a slight decline in September. In contrast, overall ratings had been gradually decreasing as the volume increased, but then experienced a rebound in September.
- Greece maintains a highly competitive overall rating when compared to the European benchmark (+0.5 pts.). This holds true for all 14 Greek regions, each having a rating above 9.0, except for the Northeast Aegean Islands.
- When examining the categories, it is evident that the **Cultural experiences** received the highest rating in Greece, with a score of 9.3 points, closely followed by **Food and Beverage** and **Sea**. This pattern was consistent across most Greek regions with a sufficient volume of reviews for analysis. However, in Crete, Food and Beverage received a higher rating than Cultural experiences, and in Epirus and Peloponnese, the Sea ranked second.
- When it comes to sentiment scores, it is quite clear that **travelers in Greece hold Personnel in high regard**, with an outstanding sentiment score of 9.4. This exceptionally positive sentiment is consistently observed in all regions. **Value for money is also generally well-received**, with a sentiment rating surpassing 8.0 in every region with an enough number of reviews.
- Regarding **Sustainable Travel** and **Hygiene**, although Greece receives high sentiment ratings, there are variations from region to region. Sustainable Travel is particularly appreciated in **Central Macedonia** and **Ionian Islands**. However, in certain regions, the scores drop below 8.0. A similar trend is seen for Hygiene, with high sentiment ratings in **Central Macedonia**, **Epirus**, and **East Macedonia and Thrace**. Conversely, the ratings fall below 8.0 in some regions.
- Overall, the **Pandemic Precaution score is relatively low**, falling below the vigilance threshold of 5.0/10. This is not surprising, given that many properties have likely relaxed their measures as the pandemic situation has evolved.
- Looking at the ratings per market, there is a stable number of reviews in the six main markets, with a notable abundance of reviews in the USA, UK, and Italy. Travelers from the USA and the UK consistently provide the highest overall ratings, with Dutch and German visitors following closely behind. However, it's important to note that the number of reviews and the rankings vary considerably from one region to another.

Period of analysis: July 1st, to September 30th, 2023.

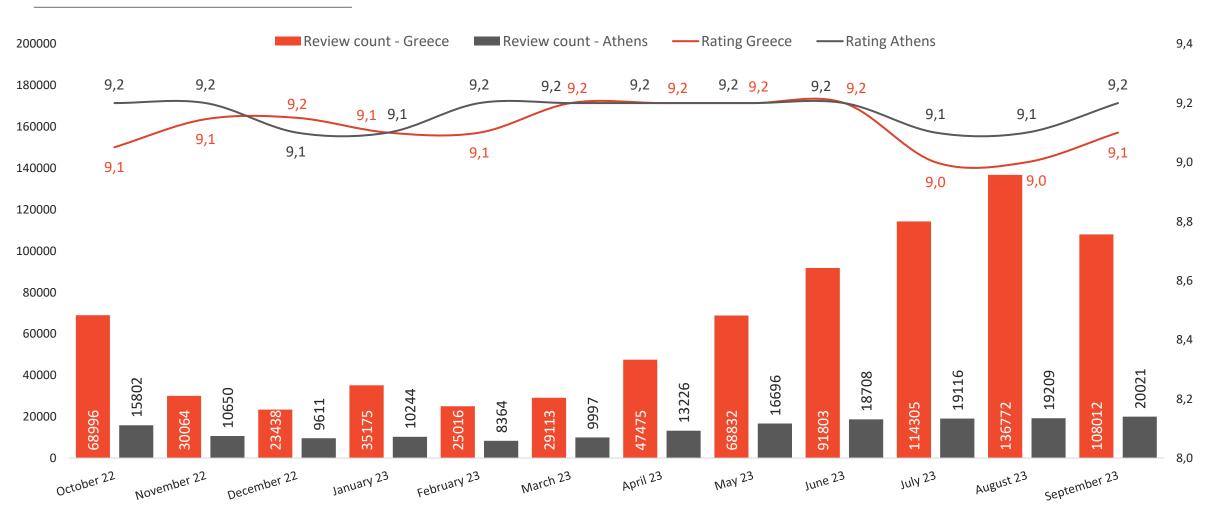






# **Overall Experience Reputation**

MONTHLY BREAKDOWN OF REVIEW VOLUME & OVERALL RATING FOR RESTAURANTS, BARS & ATTRACTIONS









## **Greece Overall**

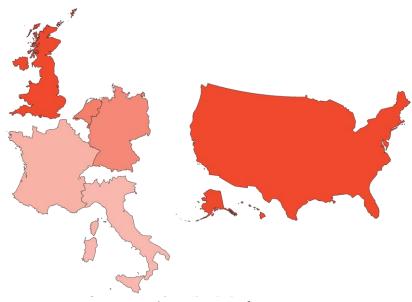
EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN GREECE



**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 359,089



### **Rating per Market**

Market	Rating	Review Volume
USA	9.2	5929
UK	8.9	7442
Netherlands	8.7	1634
Germany	8.7	2993
France	8.5	3865
Italy	8.5	5036







## **Attica**

Culture

### EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN ATTICA



8,4 8,2

9,4

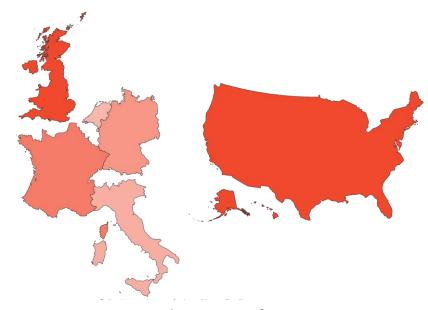
9,0

Note: Data presented here stems from numerical ratings.

Food & Beverage

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 73,729



### **Rating per Market**

Market	Rating	Review Volume
USA	9.2	3609
UK	8.9	1307
France	8.7	859
Germany	8.5	610
Italy	8.4	533
Netherlands	8.4	209

Note: Data presented here stems from numerical ratings.





Sea



# **Central Greece**

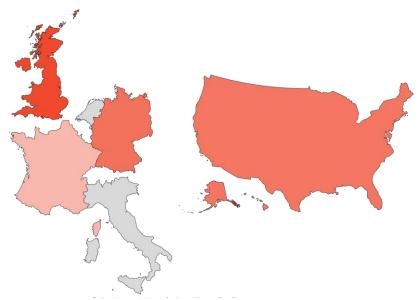
EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN CENTRAL GREECE



Note: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 3,674



## **Rating per Market**

Market	Rating	Review Volume
UK	10	22
<b>United States</b>	9.4	48
Germany	9.4	21
France	8.4	23
Italy	N/A	Low review count
Netherlands	N/A	Low review count

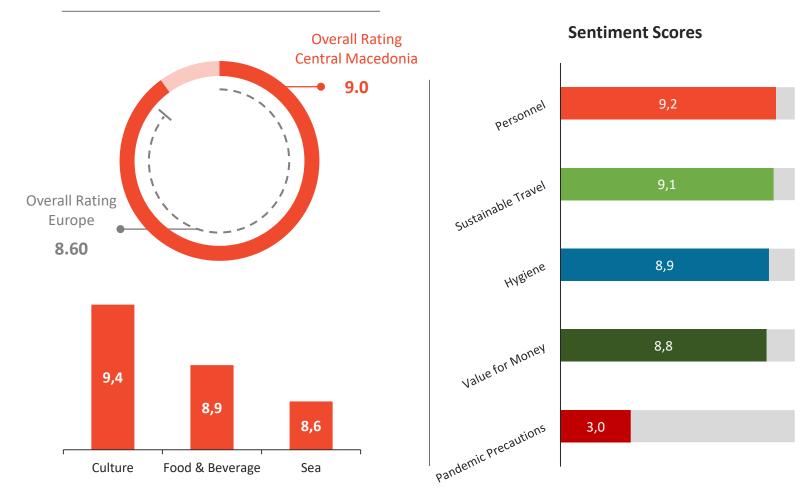






# **Central Macedonia**

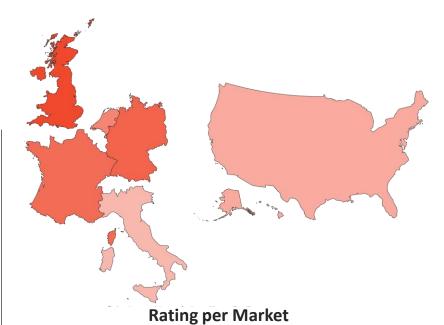
EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN CENTRAL MACEDONIA



**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 47,480



Market	Rating	Review Volume
UK	9.2	262
Germany	8.9	261
France	8.9	115
Netherlands	8.6	67
USA	8.5	54
Italy	8.0	182



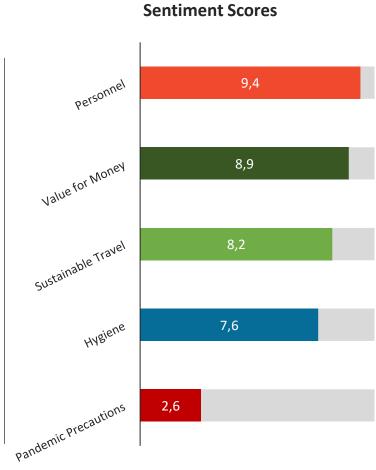




## Crete

### EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN CRETE





**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 74,705





Market	Rating	Review Volume
UK	8.9	1186
USA	8.9	296
Netherlands	8.8	238
Italy	8.5	1118
Germany	8.2	683
France	8.0	1329

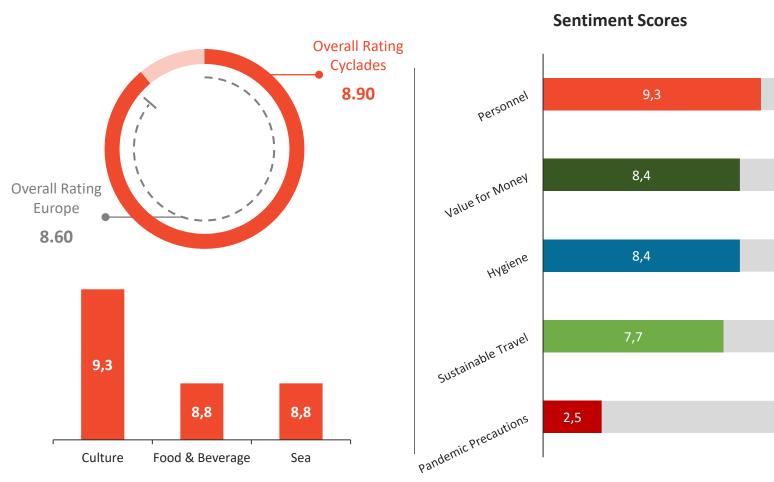






# **Cyclades**

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN CYCLADES



**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 30,321



Market	Rating	Review Volume
USA	9.3	1307
Germany	9.0	222
France	8.9	664
UK	8.8	1014
Italy	8.5	891
Netherlands	8.3	95

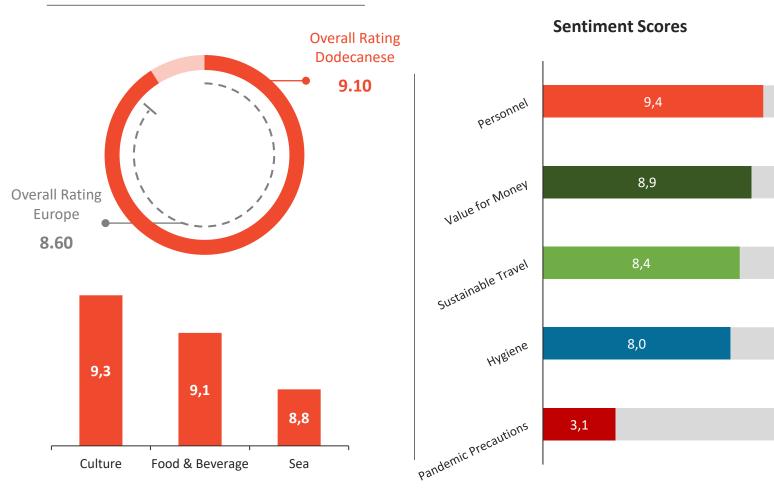






# **Dodecanese**

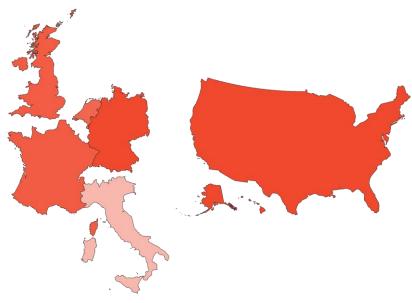
EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN DODECANESE



**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 50,276



Rating per Market

Market	Rating	Review Volume
USA	9.2	216
Germany	9.1	660
France	9.0	339
UK	9.0	1738
Netherlands	8.9	506
Italy	8.4	768







## **East Macedonia and Thrace**

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN EAST MACEDONIA AND THRACE



**Note**: Data presented here stems from numerical ratings.

**Note**: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 6,401



### **Rating per Market**

Market	Rating	Review Volume
Turkey	8.4	24
UK	N/A	Low review count
Germany	N/A	Low review count
France	N/A	Low review count
Italy	N/A	Low review count
Netherlands	N/A	Low review count
USA	N/A	Low review count

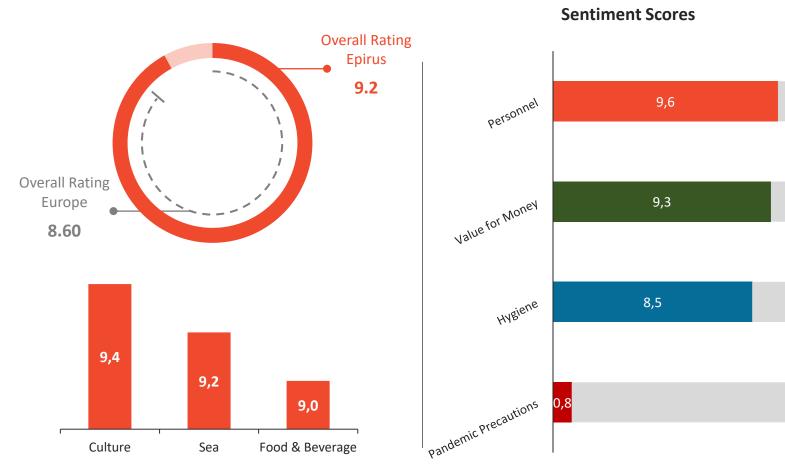






# **Epirus**

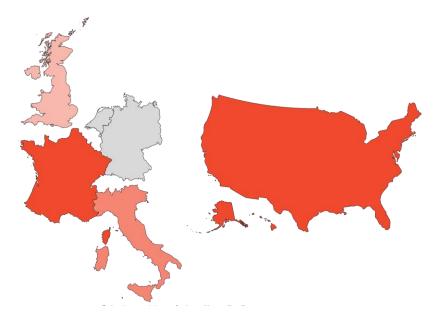
### EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN EPIRUS



**Note**: Data presented here stems from numerical ratings.

**Note**: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 4,839



### **Rating per Market**

Market	Rating	Review Volume
Australia	9.9	94
USA	9.8	59
France	9.6	52
Italy	9.3	32
UK	8.9	59
Germany	N/A	Low review count
Netherlands	N/A	Low review count

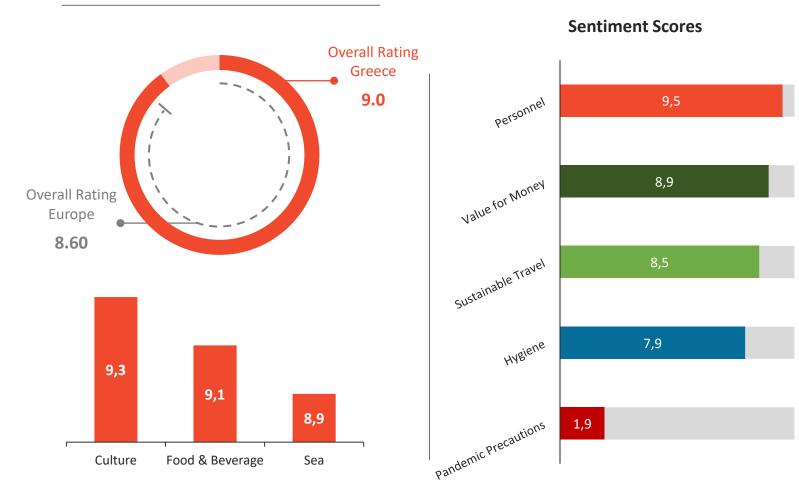






# **Ionian Islands**

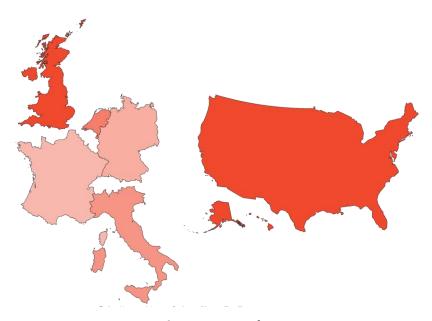
EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN IONIAN ISLANDS



**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 37,568



### **Rating per Market**

Market	Rating	Review Volume
UK	9.0	1527
USA	8.9	135
Italy	8.7	1087
Netherlands	8.7	412
Germany	8.5	358
France	8.5	239

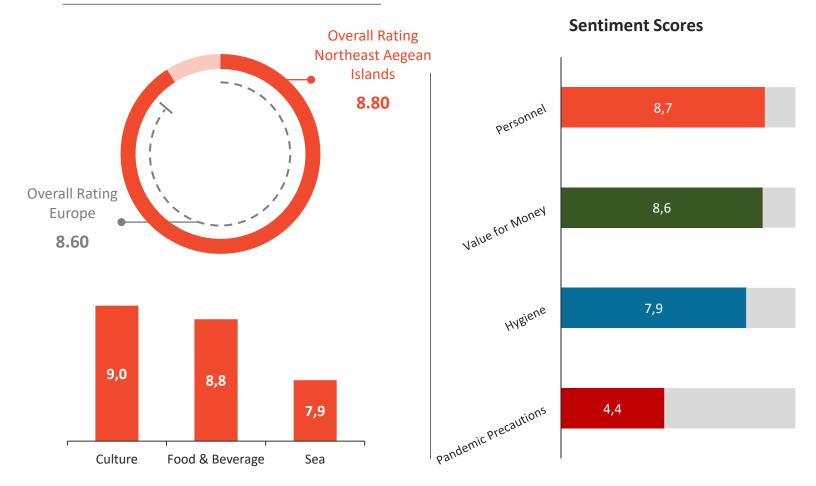






# North Aegean Islands

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN NORTHEAST AEGEAN ISLANDS



**Note**: Data presented here stems from numerical ratings.

**Note**: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 3,904



### **Rating per Market**

Market	Rating	Review Volume
Turkey	7.4	21
USA	N/A	Low review count
Italy	N/A	Low review count
UK	N/A	Low review count
Netherlands	N/A	Low review count
France	N/A	Low review count
Germany	N/A	Low review count



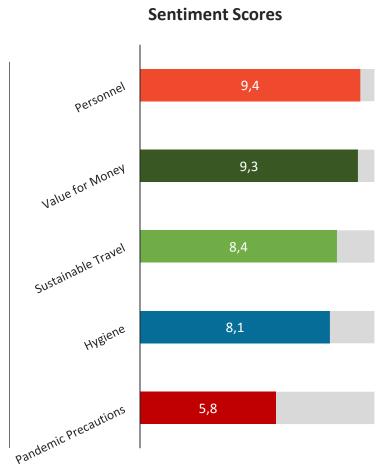




# Peloponnese

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN PELOPONNESE

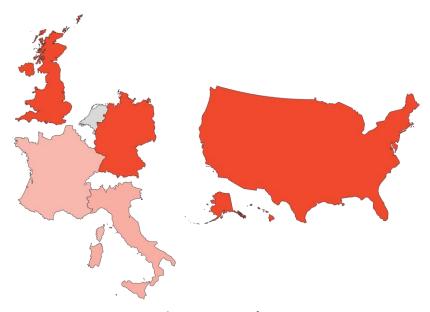




**Note**: Data presented here stems from numerical ratings.

**Note**: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 11,890



### **Rating per Market**

Market	Rating	Review Volume
UK	9.5	45
Germany	9.5	26
USA	9.4	53
Spain	8.8	32
Italy	8.7	103
France	8.7	87
Netherlands	N/A	Low review count







# **Thessaly**

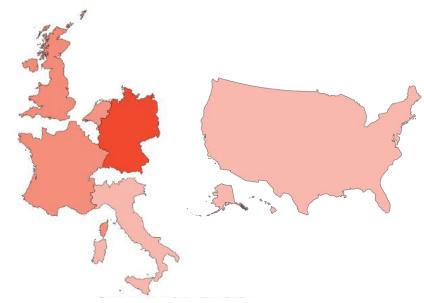
EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN THESSALY



**Note**: Data presented here stems from numerical ratings.

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 8,617



### **Rating per Market**

Market	Rating	Review Volume
Germany	9.1	82
UK	8.8	215
France	8.7	70
Netherlands	8.7	20
Italy	8.5	229
USA	7.4	71







## **West Greece**

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN WEST GREECE



Note: Data presented here stems from written reviews.



Market	Rating	Review Volume
Italy	9.2	68
Netherlands	9.2	27
Germany	9.1	37
France	9.0	75
UK	8.9	20
USA	8.7	62

Note: Data presented here stems from numerical ratings.









# **West Macedonia**

EXPERIENCE REPUTATION: RESTAURANTS, BARS & ATTRACTIONS IN WEST MACEDONIA

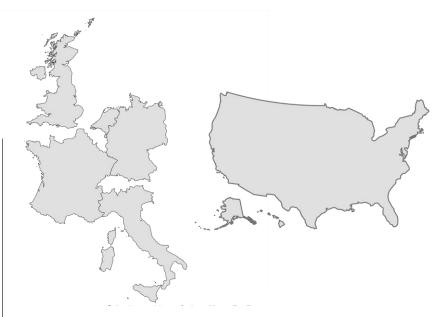


**Sentiment Scores** 

Note: Data presented here stems from written reviews.

Period of analysis: July 1st, to September 30th, 2023. Reviews count: 702

Note: Data presented here stems from numerical ratings.



### **Rating per Market**

Market	Rating	Review Volume
Cyprus	N/A	Low review count
USA	N/A	Low review count
UK	N/A	Low review count
Netherlands	N/A	Low review count
Germany	N/A	Low review count
France	N/A	Low review count
Italy	N/A	Low review count









# **Take Aways**

#### SOUVENIRS FOR THE FUTURE OF TRAVEL IN GREECE

- From a social sentiment perspective, the third quarter of 2023 was difficult for Greece. The NSI remained low throughout the Q3 due to high summer temperatures, widespread wildfires, and floods. However, online conversations about the wildfires have been on a gradual decline, and there is an expectation of recovery in the next quarter.
- The decrease in overall sentiment also had an impact on specific topics, resulting in **the NSI being below its usual levels** in all aspects of reputation. What is particularly noteworthy is the decline in sentiment in the **Environment** topic, mainly driven by concerns related to climate change, leading to a rather modest score of 15 points.
- Despite the overall decline in sentiment, online conversations consistently highlight positive aspects. These include **cultural topics** like the new Acropolis visitor zone system, wellness-focused **accommodations**, and a growing interest in **plant-based dining** alongside traditional Greek cuisine. **Sustainable initiatives** and the promotion of lesser-known destinations continue to be appealing. As for the negativity, the heatwaves also brought attention to **animal welfare** in the tourism sector. **Over tourism** remains an issue, with Athens' residents expressing concerns about Airbnb rentals.
- When examining visitor satisfaction, **review volume has kept growing**, reaching its highest point in August before experiencing a slight decrease in September. Conversely, while the volume increased, overall ratings had been steadily decreasing, seeing **a rebound in September**.
- Greece's overall ratings, as well as all 14 regions surpass the European average. In Greece overall, the highest rating was given to the Cultural experience, scoring 9.3 points, closely trailed by Food and Beverage and the Sea. This trend remained consistent in most Greek regions.
- In terms of Sentiment Ratings, it is evident that tourists in Greece highly appreciate the **Personnel**, and there is generally positive feedback about the **Value for Money** of experiences. However, there are variations between different regions when it comes to **Sustainable Travel** and **Hygiene**, although Greece receives favourable sentiment ratings.
- Travellers from the USA and the UK gave the highest overall ratings to Greece, closely trailed by Dutch and German visitors. However, it's worth noting that this ranking varies significantly from one region to another.







# **Appendix A**

SOURCES FOR DATA STEMMING FROM SOCIAL LISTENING

### Unveiling the global online reputation of travel brands

Travel brands' online reputation is measured through global online conversations and comments on various platforms. These are shared by differing media, consumers, companies, citizens, brands and officials on websites, forums, blogs & social networks.

#### **Social Networks:**

- TikTok
- YouTube
- Pinterest
- Vkontakte

### **Blogs / Forums**

- Travel blogs
- Reddit, etc.

### Magazine

- Travel magazine
- Lifestyle magazine, etc.

### **Online News**

- **Greek Reporter**
- National Geographic, etc.

### **Newspaper, News Agency**

- Daily Mail
- The Washington post, etc.

### TV/Radio

RTBF, etc.

**Podcasts** 

**Press Releases** 

Substack

**Twitch** 







# **Appendix B**

SOURCES FOR DATA STEMMING FROM RATINGS & REVIEWS

### Analysing visitor experience based on ratings and reviews data

Currently **45 sources** are connected to analyse ratings and reviews data. They account for **95% of all experience-based data available online**.

- Agoda
- AirBnB
- Booking.com
- BungaloSpecials.nl
- Camping.info
- Camping2be
- CheapTickets
- Ctrip (Trip.com)
- Dagjeweg
- Ebookers
- Expedia.com
- Facebook

- GetYourGuide
- Goibibo.com
- Google
- Holidaycheck.de
- Hostelworld
- Hotels.com
- Hotels.nl
- HotelSpecials.nl
- HRS
- Klook
- Latminute.com.au

- MakeMyTrip
- MeetingReview
- Musement
- Open Table
- Orbitz
- Otelpuan
- Parkvaccances
- Rooms for Africa
- Staycation
- TableOnline.fi
- Takeaway.com

- TheFork
- Travelocity
- Traveloka
- TripAdvisor
- Trustpilot
- Viator
- Weekendjeweg.nl
- Wotif
- Yelp
- Zomato
- Zoover









ЕПАVEK 2014— ЕПІХЕРНЕЧАКО ПРОГР АМТАГЛИЕТИКОТН ВТЕХЕРНАТІКОТН КАІМОТОМІА



