ID

All Italian Data

2023 REPORT

ID ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

ALMAWAVE

AlmaviA

What is Italy Digital Destination?

The Italy Digital Destination Award is the nation's first and only recognition dedicated to honouring Italian regions that have achieved the highest online performance in the past year. **Developed and managed by The Data Appeal Company since 2016**, this award is granted based on an extensive analysis of billions of pieces of online content and conversations about accommodation properties, attractions, and food and beverage establishments. This information is then combined with industry trends, visitor flows, and hotel and flight reservations, including prices.
The outcome is the most thorough and detailed analysis of the current state of Italy's tourism offerings, as experienced and described by its visitors.

The most recent edition, #IDD2023 as been thoroughly revised and broadened across multiple platforms and sectors, staying informed about the latest trends in Italian tourism.
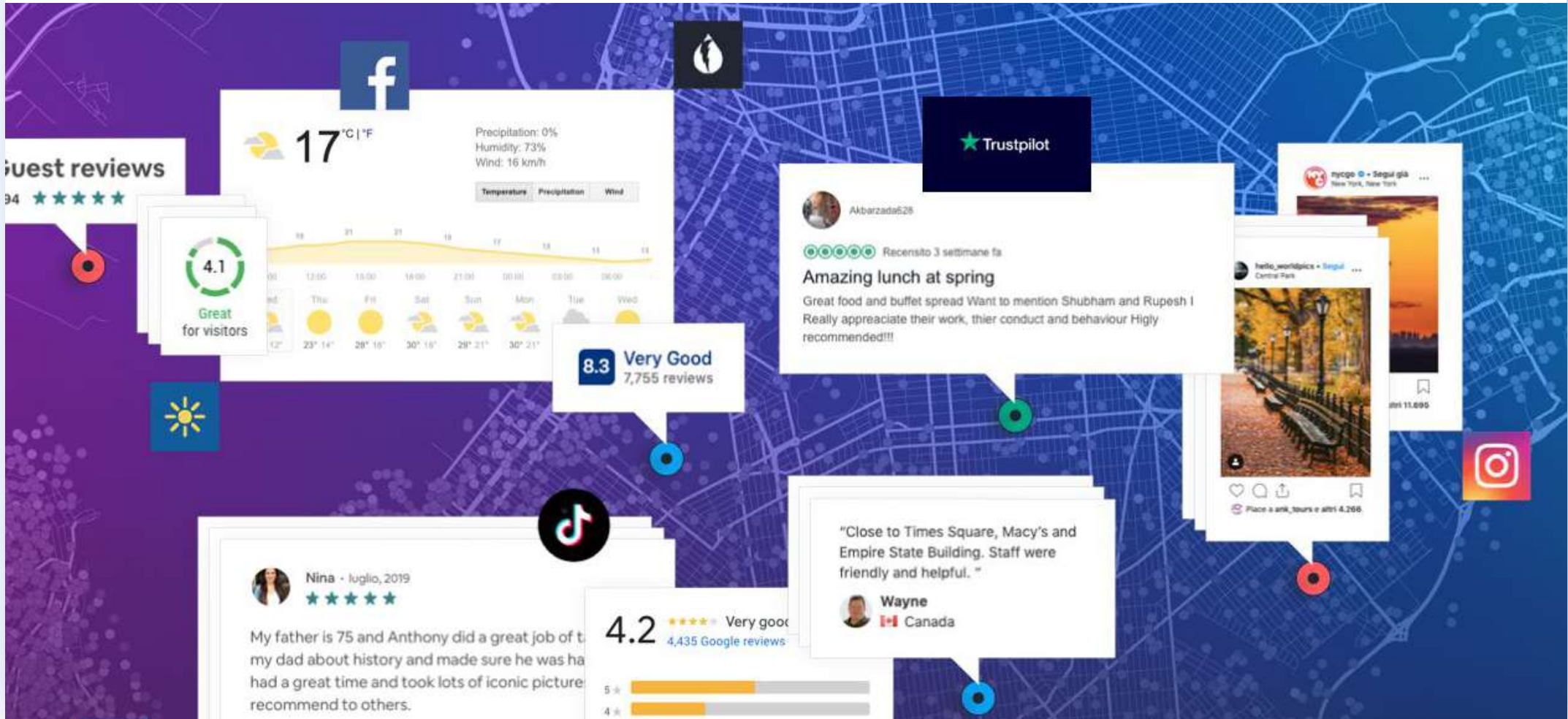
THE DATA APPEAL COMPANY

IDD 2023: Insights and statistics

876K
POINTS OF INTEREST

40MLN
DIGITAL TRACES

SEPT 2022 - AUG 2023

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ALMAWAVE GROUP

What makes up Italy's tourism offer?

Points of Interest distribution based on industry

15% HOSPITALITY

38% FOOD AND BEVERAGE

16% ATTRACTIONS

20% SHORT-TERM RENTALS

Main platforms monitored:

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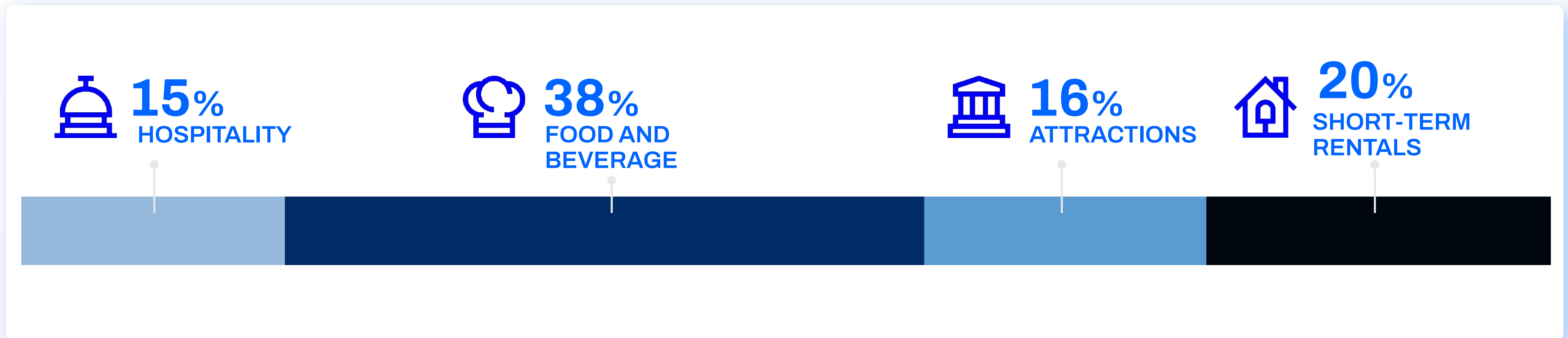
Volume of online content

Distribution of online content based on industry

32% HOSPITALITY   **46%** FOOD AND BEVERAGE   **11%** ATTRACTIONS   **7%** SHORT-TERM RENTALS

Main platforms monitored:

THE **DATA APPEAL** COMPANY

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Seasonality

Content volume over time

— Sept 2021 - Aug 2022   — Sept 2022 - Aug 2023

| Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug |

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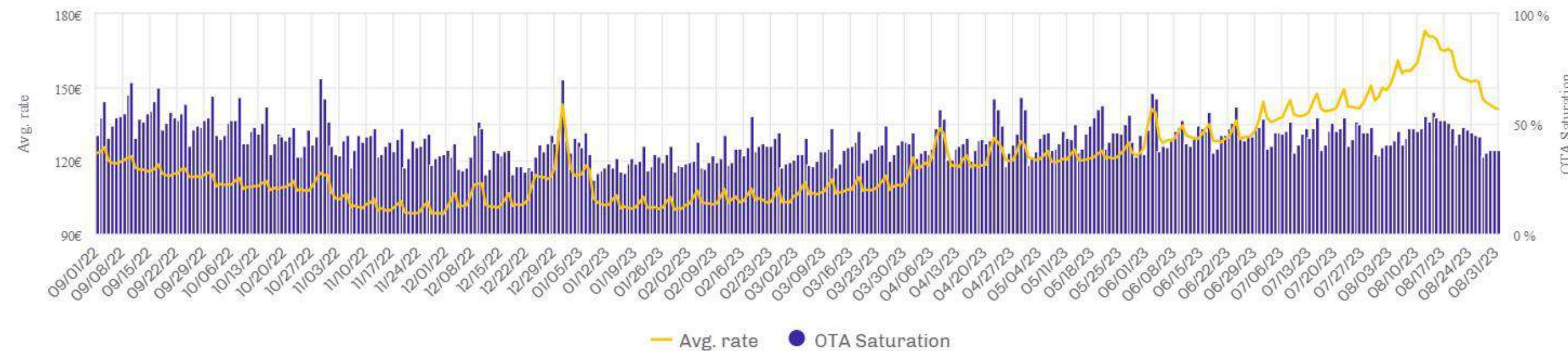
Average accommodation prices and sentiment
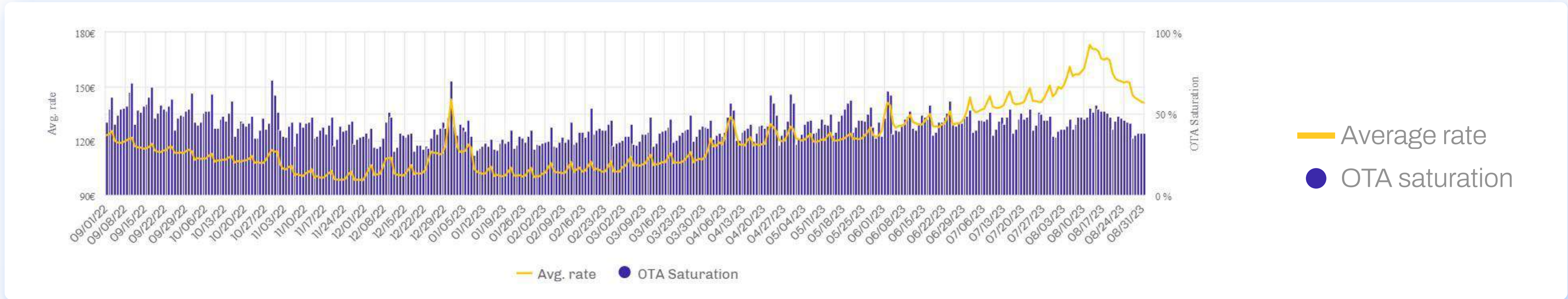
Revenue per Available Room variation

JUN - SEPT 2023 VS 2022

Sea	Mountain	Lake	Thermal Area	City	Bungalow & Caravan
REVPAR	REVPAR	REVPAR	REVPAR	REVPAR	REVPAR
↑ 6,22 %	↑ 7,37 %	↑ 10,96 %	↑ 18,41 %	↑ 10,11 %	↑ 9,78 %

SELECTED PROPERTIES	SAMPLE ROOMS/UNITS	TOTAL REVENUE - Summer 2023	Summer 2023 vs. 2022
1.113	70.553	952,2 M	↑ 58,2 M
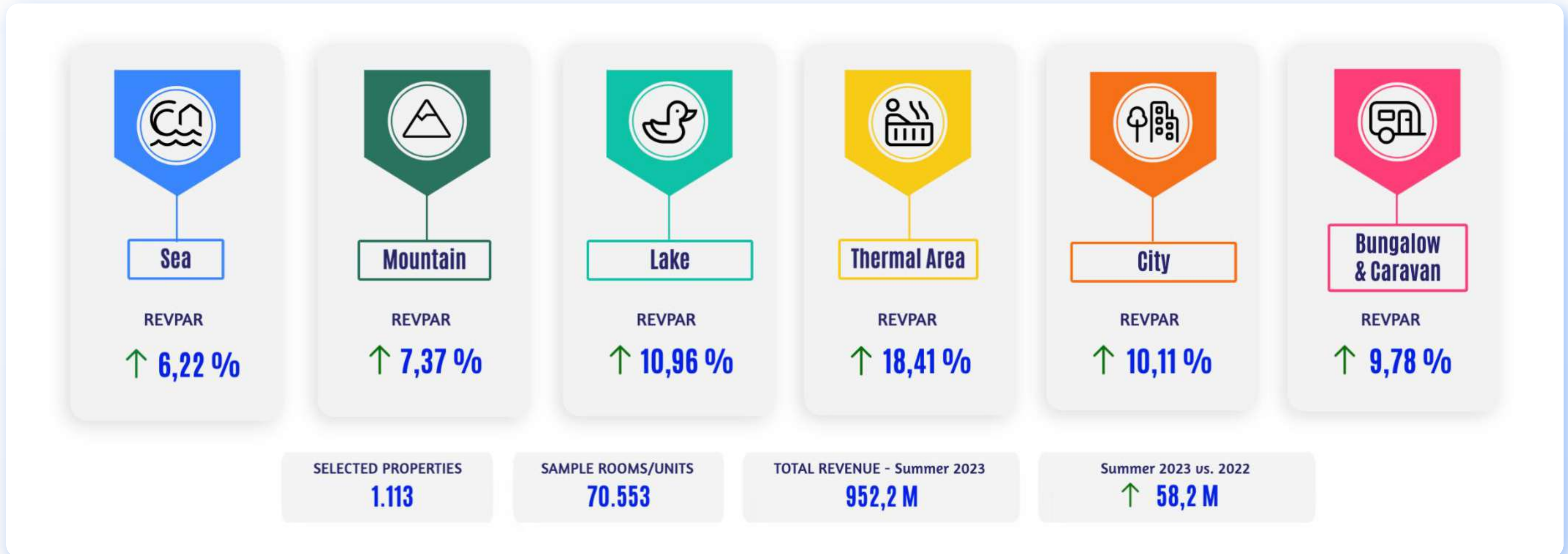
ANALYSIS SOURCE: HBenchmark Hospitality Data Intelligence

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Visitor origin by country

85/100

FOREIGN VISITORS' SENTIMENT

56,8%

%TOTAL FOREIGN VISITORS

+5% compared to 2022 ▲
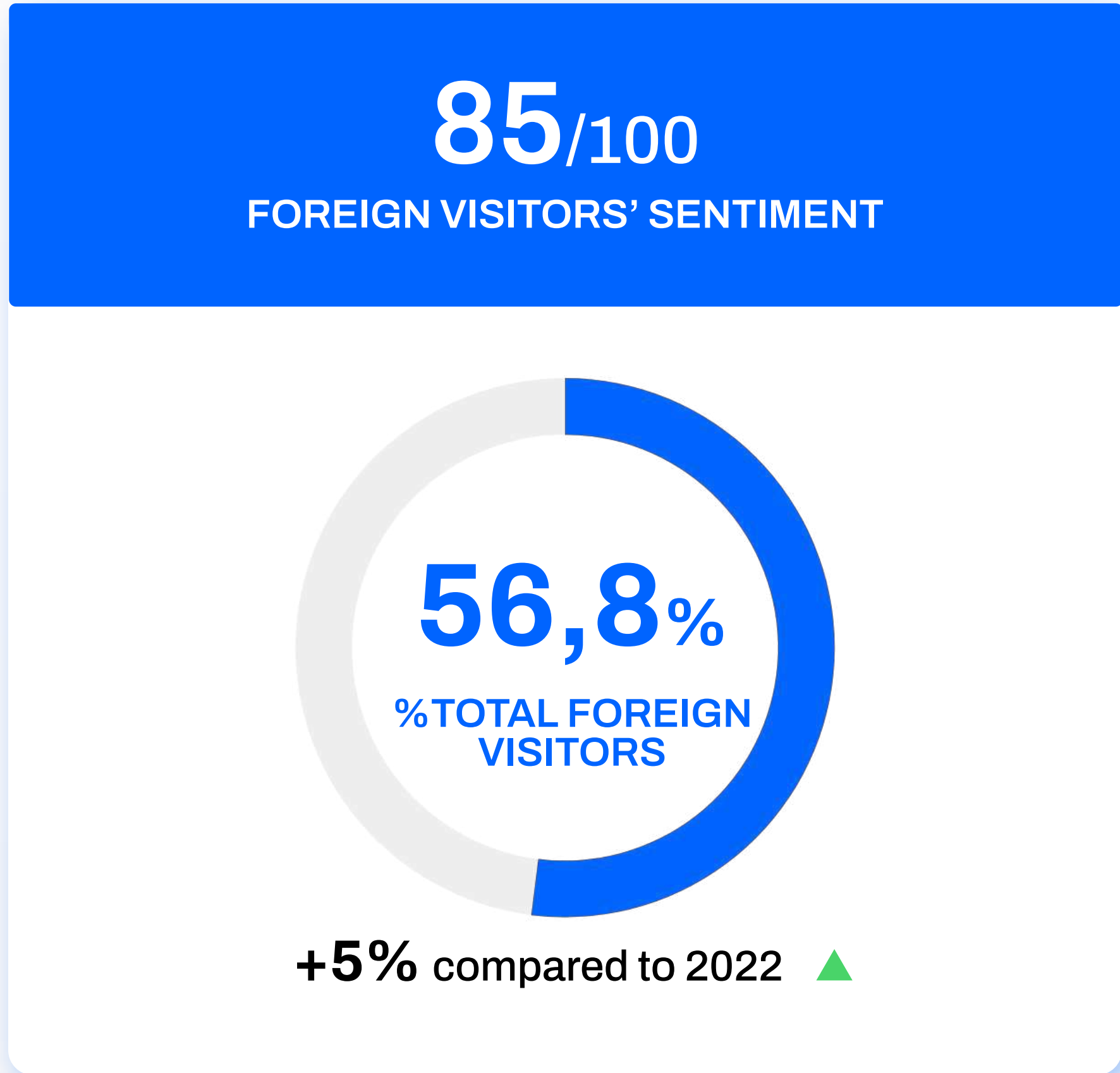
		Digital traces distribution	↓ Avg. sentiment
🇮🇹	Italy	**43.9%**	**84.4**/100
🇩🇪	Germany	**8.5%**	**84.9**/100
🇫🇷	France	**5.9%**	**84.4**/100
🇬🇧	United Kingdom	**3.8%**	**85.9**/100
🇨🇭	Switzerland	**3.1%**	**84.1**/100

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Visitor types

	Digital traces distribution	Avg. sentiment
👥 Couples	**47.8%**	**85.5**/100
❤️ Families	**28.2%**	**84.9**/100
👥 Group	**12.8%**	**84.7**/100
🧍 Single	**10.6%**	**83.2**/100
💼 Business	**0.5%**	**81.6**/100

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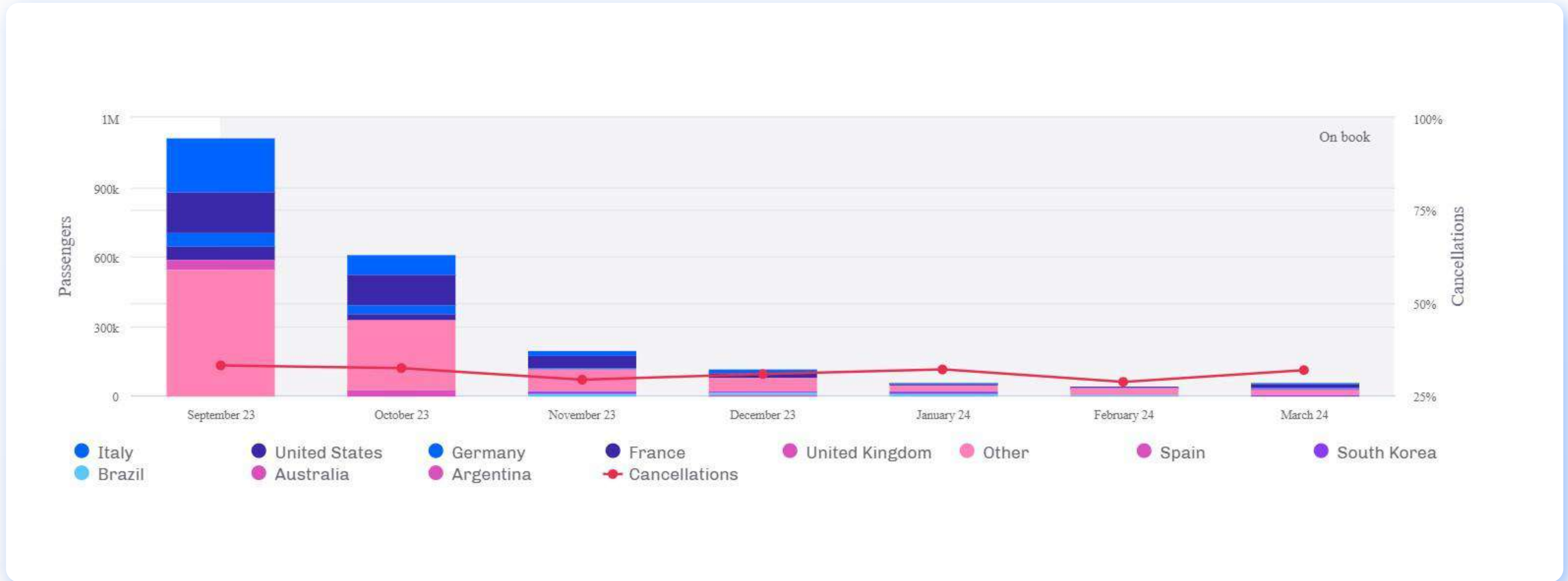
Forecasting: Six-month outlook

SEPT 2023 - MAR 2024

How are hotel room availability and pricing anticipated to fluctuate in the coming months?

We analyse rates and offerings from key OTAs. The saturation rate is determined based on the ratio of available offers to those that have been sold or are no longer available.
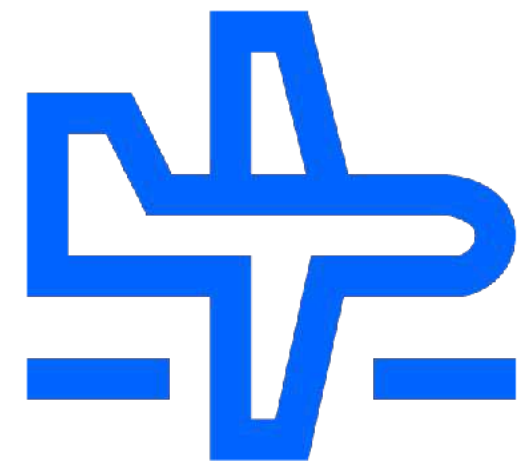
OTA SATURATION

22,5%

AVERAGE RATES

130€

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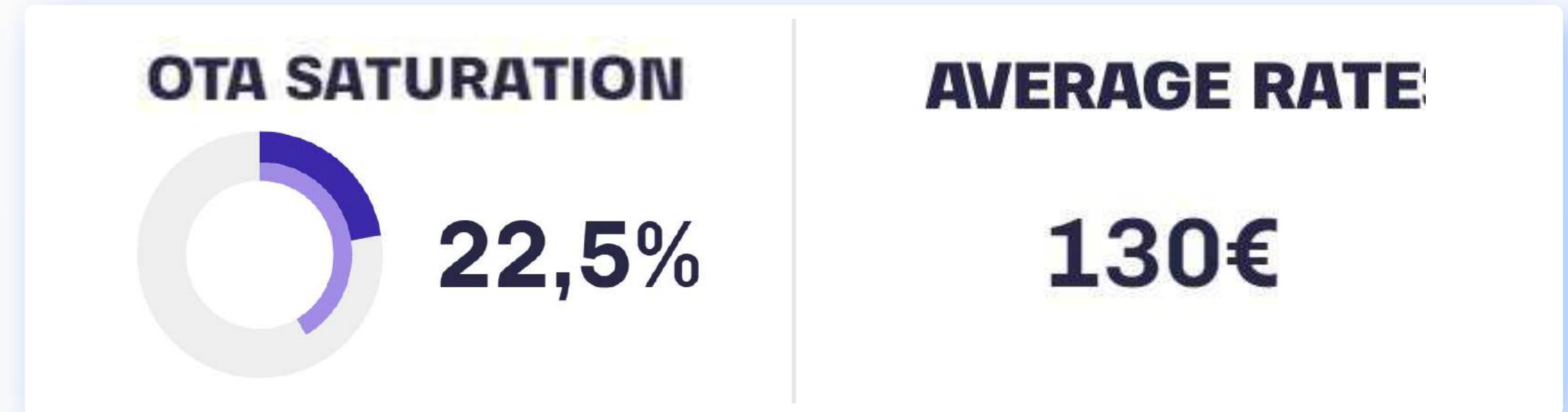
Visitors arriving over the next six months

	Passengers distribution ↓	Cancellations	Booking window in days	Top booking period	Top arrival period
🇺🇸 United States	18.7%	29.4%	143	Aug	Sep
🇮🇹 Italy	16.5%	13.8%	47	Sep	Sep
🇩🇪 Germany	5.4%	29.3%	85	Sep	Sep
🇫🇷 France	4.4%	19.1%	67	Sep	Sep
🇬🇧 United Kingdom	3.8%	33.3%	88	Sep	Sep

SEPT 2023 - MAR 2024

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#IDD2023

What attractions do visitors appreciate the most?

Top 10 Italian attractions based on content volume

SEPT 2022 - AUG 2023

			CONTENT	SENTIMENT
6°	THE VERONA ARENA	Verona	24.147	93,2 /100
7°	VATICAN MUSEUMS	Roma	23.258	91,8 /100
8°	RIALTO BRIDGE	Venezia	22.810	93,4 /100
9°	PIAZZA SAN MARCO	Venezia	20.333	94,3 /100
10°	PIAZZA DEL DUOMO	Pisa	19.590	95,2 /100

MILANO

PISA

ROMA

4° Duomo di Milano

CONTENT 26.8 K
SENTIMENT 94.7

1° Colosseum

CONTENT 58.9 K
SENTIMENT 94.4

3° Pantheon

CONTENT 32.2 K
SENTIMENT 95.1

2° Leaning Tower of Pisa

CONTENT 36.4 K
SENTIMENT 93.9

5° Piazza Navona

CONTENT 24.6 K
SENTIMENT 95.1

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#IDD2023

The most-appreciated wineries in Italy

Wineries with the highest Sentiment Score

SEPT 2022 - AGO 2023

3°
Antinori nel Chianti Classico
SAN CASCIANO VAL DI PESA

91,2
SENTIMENT

88.6
SENTIMENT

2°
Castello di Verrazzano
GREVE IN CHIANTI

1°
Tenuta di Castellaro
LIPARI

91,8
SENTIMENT

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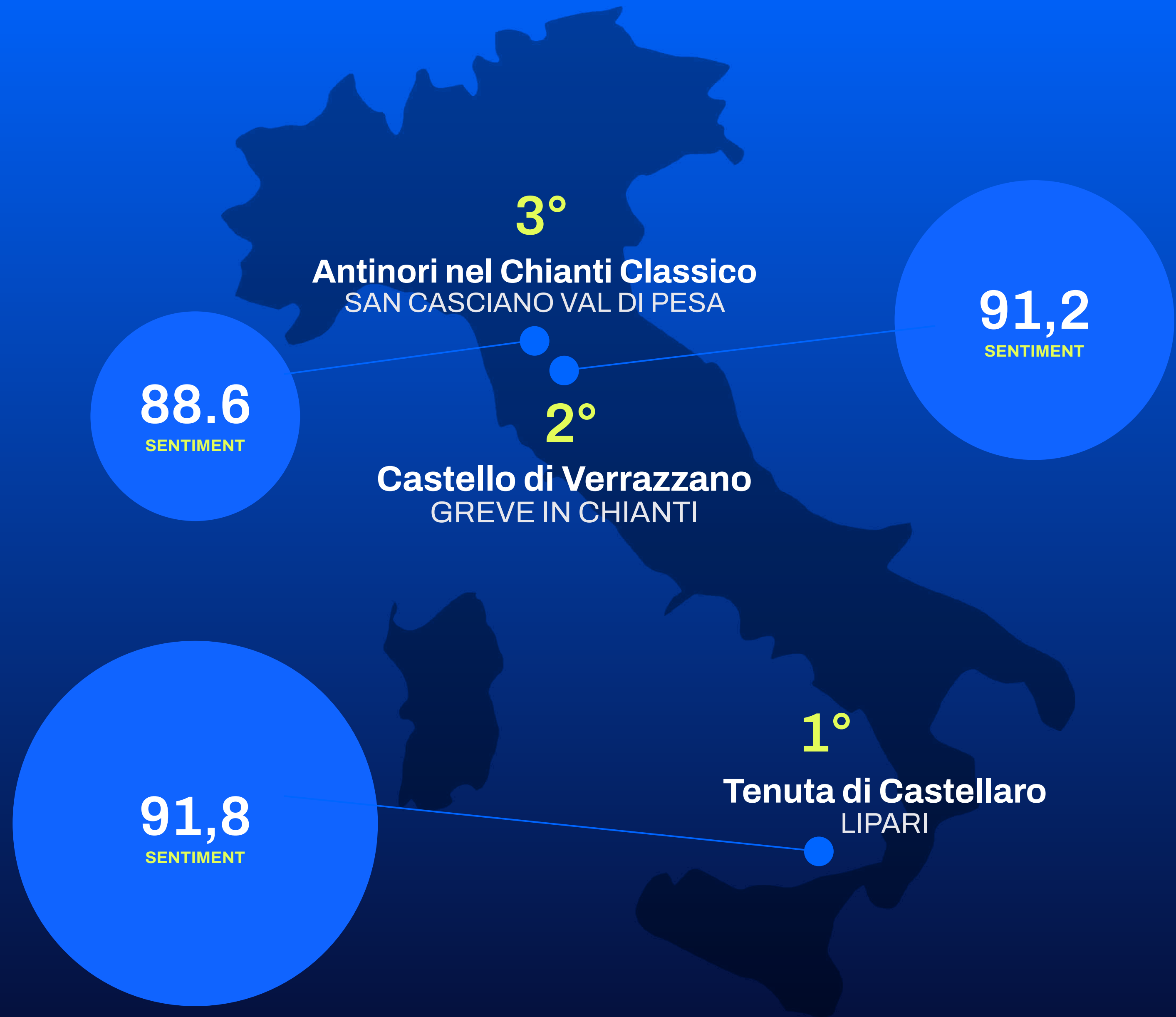
Italy Digital Destination Awards
2023 Edition

Hospitality
analysis

Sept 2022 - Aug 2023

Digital presence

129 K
ACCOMMODATION OPTIONS IN ITALY

OF WHICH
89 %
HAVE BEEN ACTIVE IN THE PAST 6 MONTHS
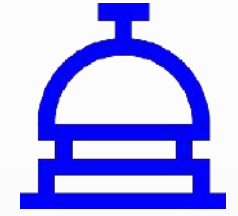
Category	Distribution	Content Distribution	Sentiment
B&B	38%	25,7%	88,1 /100
HOTEL	35%	63,4%	83,7 /100
FARMHOUSE	14%	4,1%	90,5 /100
CAMPING	2%	2,2%	82,6 /100
OTHER ACCOMMODATION TYPES	11%	4,3%	85,9 /100

Macro areas
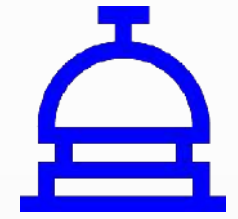
85,1 /100

AVERAGE SENTIMENT
IN ITALY

-0,3 ▼

COMPARED TO THE PREVIOUS
PERIOD

NORTHERN ITALY
-0,1 points

85,0 /100
GUEST SENTIMENT
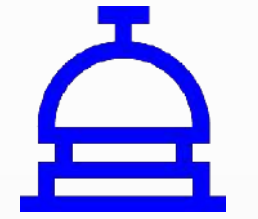in the **hospitality** sector

CENTRAL ITALY
-0,5 points

83,9 /100
GUEST SENTIMENT
in the **hospitality** sector

SOUTHERN ITALY
-0,1 points

86,7 /100
GUEST SENTIMENT
in the **hospitality** sector

Most-discussed topics

	Sentiment		Content	
Staff	94,2 /100	▲	20%	▼
Room	72,7 /100	▼	20%	▲
Food and dining	87,3 /100	▲	18%	▼
Atmosphere	85,8 /100	▼	17%	▲
Cleanliness	87,4 /100	▼	6%	▲
Services	74,5 /100	▲	6%	▲
Property	86,4 /100	▼	4%	▼
Price quality	71,3 /100	▲	3%	▲
Transfers and parking	81,2 /100	▲	2%	▲

85,1 /100

AVERAGE SENTIMENT IN ITALY

Hotel staff · Food · Atmosphere · Room · Cleanliness · Structure · Costs · Services · Parking... · Inte... · Gen... · C... · Lo... · Eq... · Bea... · Ent...

ALMAWAVE GROUP
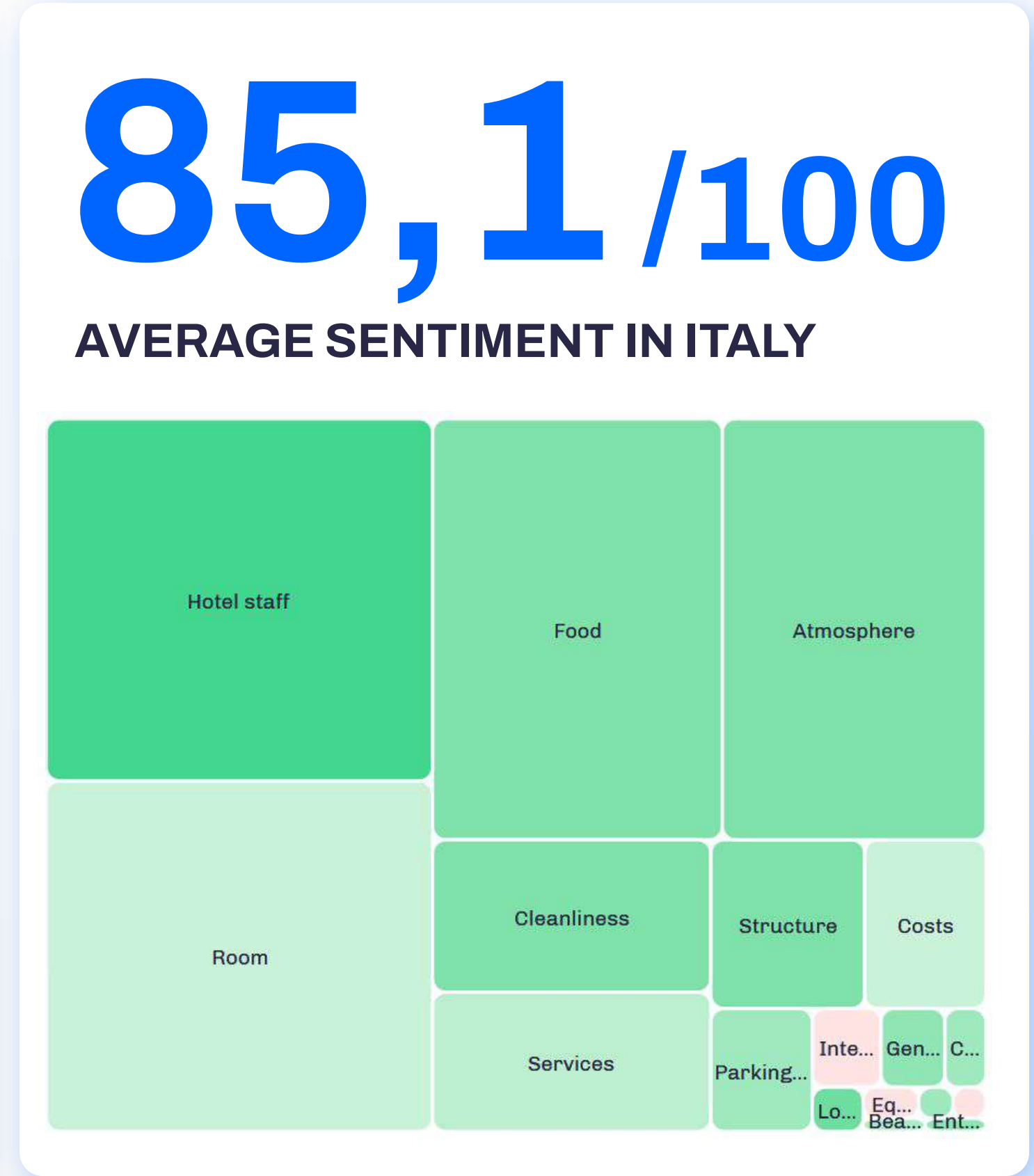
Italy Digital Destination Awards
2023 Edition

Short-term rental analysis

Sept 2022 - Aug 2023

ID ITALIA DESTINAZIONE DIGITALE

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Digital presence
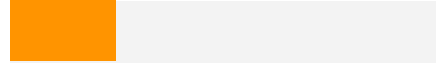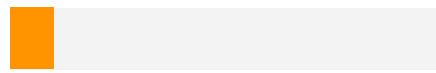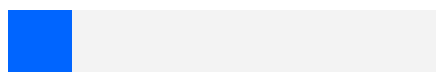
175 K
SHORT-TERM RENTALS IN ITALY

OF WHICH

85 %
HAVE BEEN ACTIVE IN THE PAST 6 MONTHS

Category	Distribution	Content Distribution	Sentiment
HOUSE/APARTMENT	70%	60,6%	91,5 /100
GUESTHOUSE/B&B	25%	33,3%	88,0 /100
HOLIDAY APARTMENT	5%	6,1%	89,1 /100

Macro areas

90,2 /100

AVERAGE SENTIMENT
IN ITALY

-1,0 ▼

COMPARED TO THE PREVIOUS
PERIOD

NORTHERN ITALY
-1,2 points

90,1 /100
GUEST SENTIMENT
for **short-term rentals**

CENTRAL ITALY
-1,2 points

90,1 /100
GUEST SENTIMENT
for **short-term rentals**

SOUTHERN ITALY
-0,7 points

90,5 /100
GUEST SENTIMENT
for **short-term rentals**

Most-discussed topics

	Sentiment		Content	
Atmosphere	89,8 /100	▼	26%	▼
Location	95,0 /100	▼	26%	▲
Amenities	79,8 /100	▼	14%	▲
Room	84,2 /100	▼	12%	▼
Host	94,6 /100	▼	11%	▼
Cleanliness	91,1 /100	▼	10%	▼
Costs	82,7 /100	▼	1,5%	▲
Internet	60,7 /100	▼	1%	▼

90,2 /100

AVERAGE SENTIMENT IN ITALY

Atmosphere
Equipments
Rooms
Position
Host
Cleanliness
Costs
Intern...

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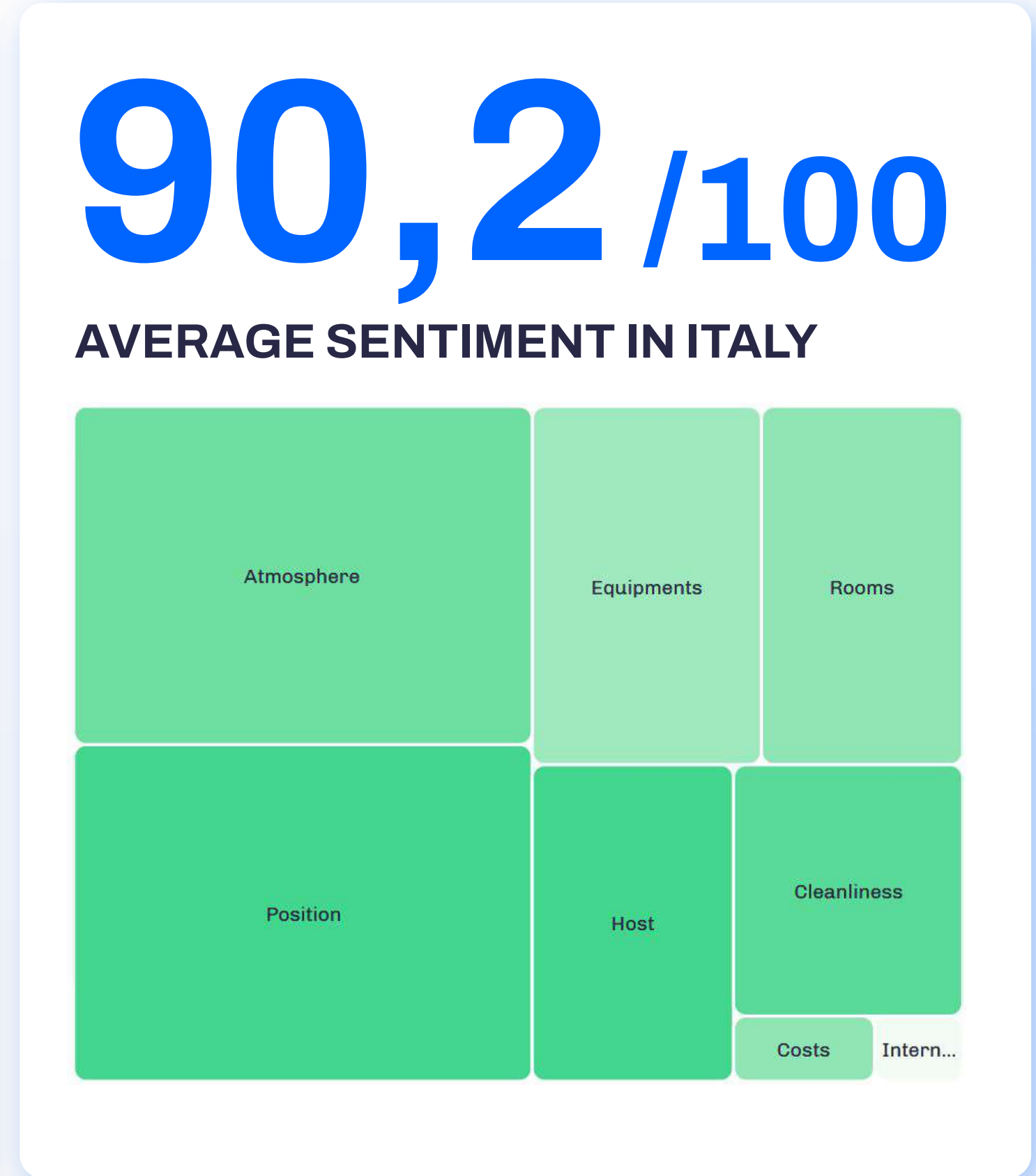
Italy Digital Destination Awards
2023 Edition

Food and Beverage
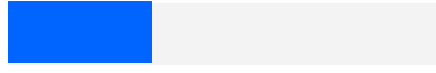# analysis

Sept 2022 - Aug 2023

Digital presence

336 K
FOOD AND BEVERAGE BUSINESSES IN ITALY ACTIVE ONLINE

OF WHICH

90 %
BEING ACTIVE IN THE PAST 6 MONTHS

Category	Distribution	Content	Sentiment
RESTAURANT	33%	54,0%	86,6 /100
BAR	23%	10,3%	85,8 /100
PIZZERIA	11%	14,8%	86,3 /100
GELATERIA	3%	3,2%	89,1 /100
OTHER DINING ESTABLISHMENT TYPES	30%	10,9%	85,9 /100

Macro areas

86,4 /100

AVERAGE SENTIMENT IN ITALY

+0,1 ▲

COMPARED TO THE PREVIOUS PERIOD

NORTHERN ITALY
0,0 points

86,2 /100
CUSTOMER SENTIMENT across **dining establishments**

CENTRAL ITALY
0,0 points

86,9 /100
CUSTOMER SENTIMENT across **dining establishments**

SOUTHERN ITALY
+0,3 points

86,1 /100
CUSTOMER SENTIMENT across **dining establishments**

Most-discussed topics

	Sentiment		Contents	
Atmosphere	88,4 /100	▼	30%	▲
Hospitality	90,1 /100	▼	25%	▲
Food quality	85,9 /100	▼	23%	▼
Location	90,8 /100	▼	10%	▼
Appearance	83,7 /100	▼	6%	▲
Costs	52,1 /100	▼	3%	▼
Cleanliness	81,2 /100	▼	2%	—
Services	73,1 /100	▼	1%	▼
Organisation	69,7 /100	▲	0,3%	▼

86,4 /100

AVERAGE SENTIMENT IN ITALY

Atmosphere

Food quality

Hospitality

Position

Costs

Appearance

Cleanli...

Services
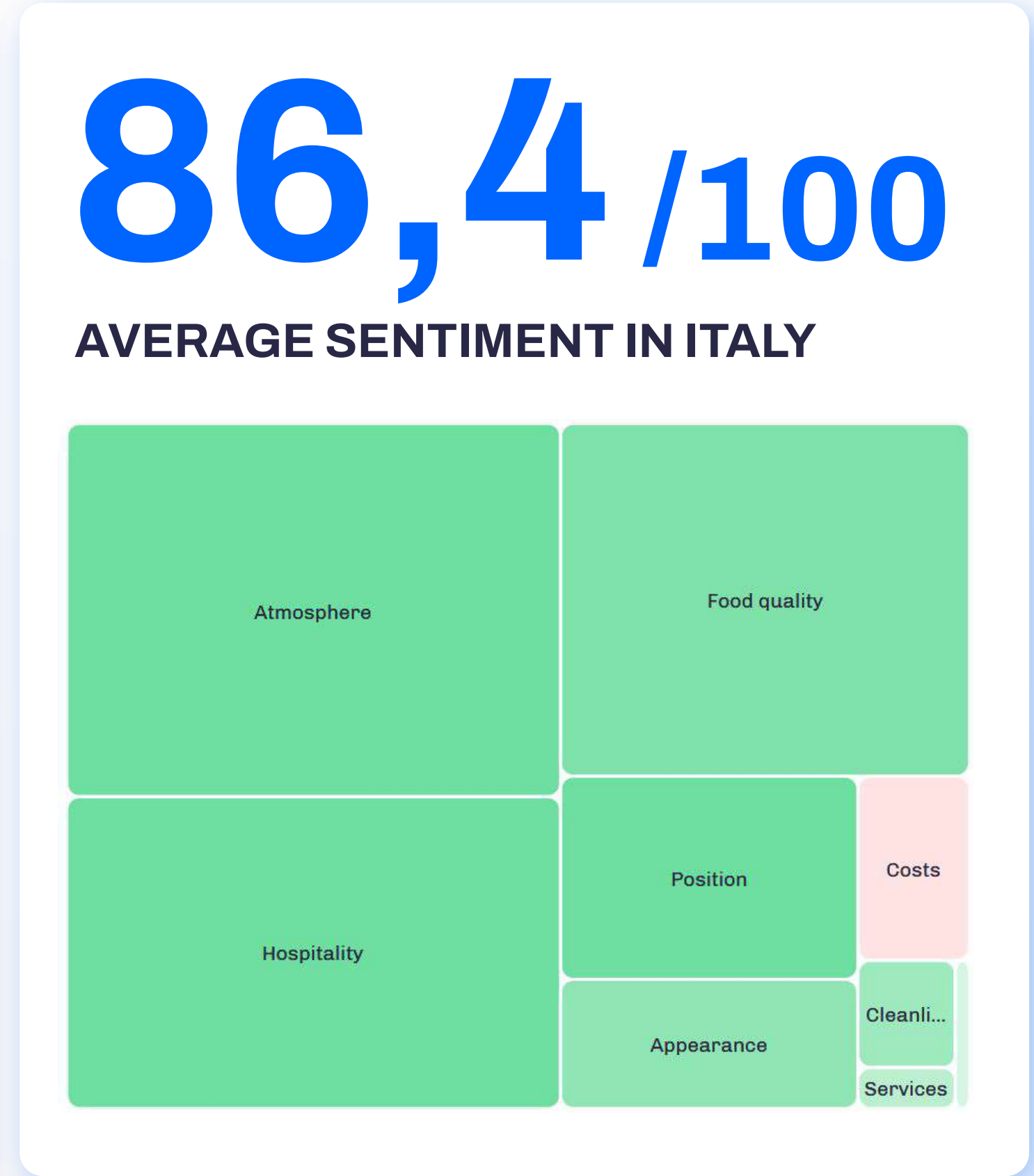
Italy Digital Destination Awards
2023 Edition

Attraction
analysis

Sept 2022 - Aug 2023

Digital presence

141 K

ATTRACTIONS IN ITALY ACTIVE ONLINE

OF WHICH

80 %

HAVE BEEN ACTIVE IN THE PAST 6 MONTHS

Category	Distribution	Content Distribution	Sentiment
ATTRACTIONS	13%	29,1%	91,3 /100
PARKS	12%	10,4%	88,1 /100
MUSEUMS	8%	14,6%	91,6 /100
BATHING ESTABLISHMENTS	7%	7,8%	85,3 /100
OTHER ATTRACTIONS	60%	20,9%	92,7 /100

* Monuments, theatres, libraries, castles, experiences, beaches, etc.

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Macro areas

90,9 /100

AVERAGE SENTIMENT IN ITALY

+0,3 ▲

COMPARED TO THE PREVIOUS PERIOD

NORTHERN ITALY
+0,1 points

90,8 /100
VISITOR SENTIMENT across **attractions**

CENTRAL ITALY
+0,3 points

91,8 /100
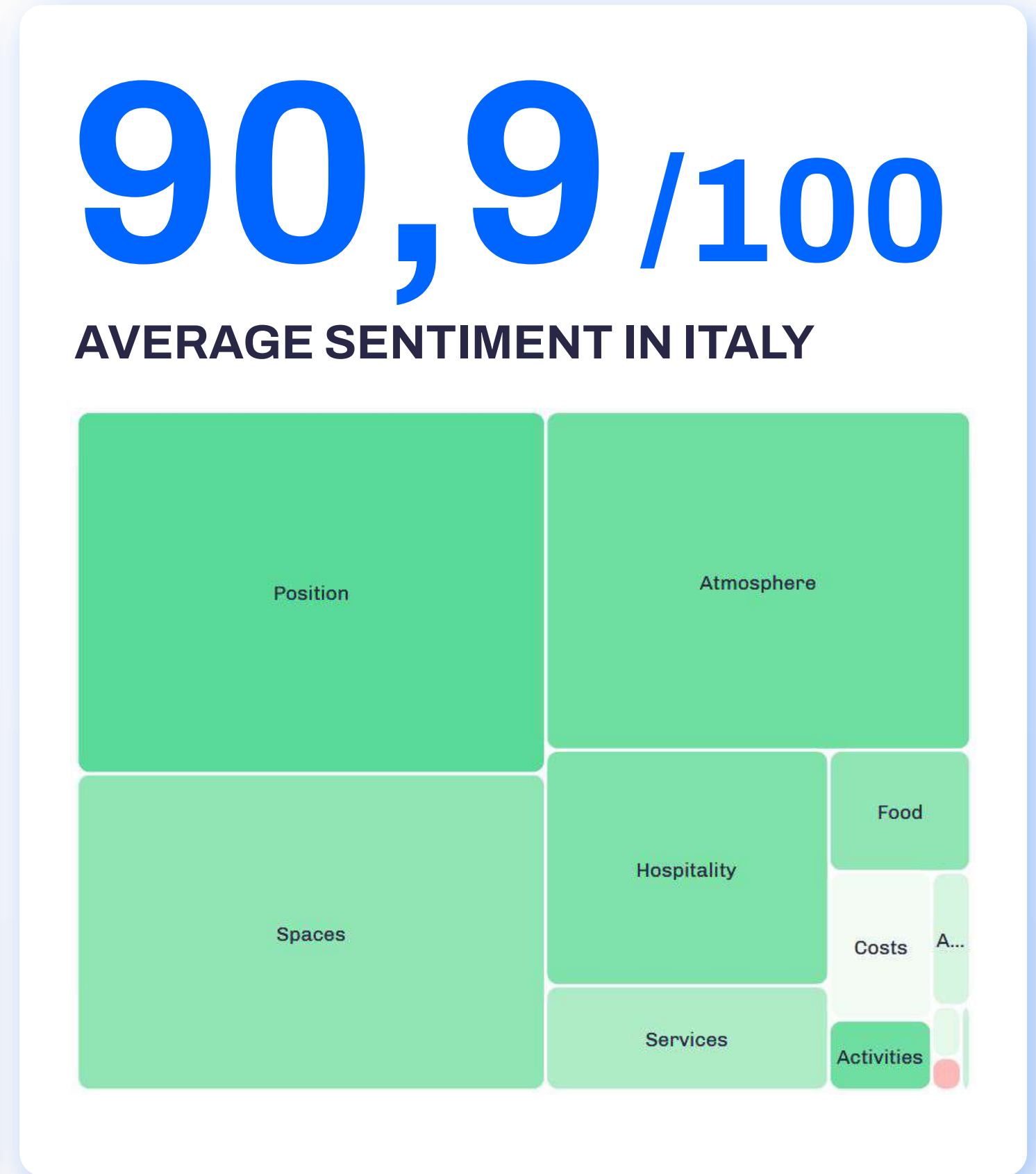VISITOR SENTIMENT across **attractions**

SOUTHERN ITALY
+0,4 points

90,0 /100
VISITOR SENTIMENT across **attractions**

Most-discussed topics

	Sentiment	Content
Location	92,7 /100 ▼	28% ▼
Space	84,7 /100 ▼	24% ▼
Atmosphere	90,8 /100 ▼	24% ▲
Hospitality	87,6 /100 ▼	11% ▲
Services	78,7 /100 ▼	5% ▲
Food and dining	83,9 /100 ▼	3% ▼
Costs	61,0 /100 ▲	3% ▲
Activities	89,7 /100 ▼	1% ▲
Accessibility	68,6 /100 ▼	1% ▲

90,9 /100

AVERAGE SENTIMENT IN ITALY

Position • Atmosphere • Spaces • Hospitality • Food • Costs • A... • Services • Activities

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Methodology

The Data Appeal Company is an alternative data and solutions provider. Using proprietary techniques, Data Appeal collects and monitors the digital presence of Points of Interest (POIs) in an area by analysing over 100 websites, OTAs, social media channels, and more, ranging from well-known to highly specialised platforms within each sector.

The recovery methodology involves a unique recognition and reconditioning process through an algorithm that aims to maximise the probability that the **explored channels are related to the same POI**.

After undergoing a complex data quality process, each POI detected is thoroughly examined, including its unique characteristics such as location, type, and services offered. Additionally, visitor details like origin, language, and trip type are investigated. The contents of the digital human experience (reviews, ratings, comments, social posts, etc.) are **read and semantically analysed using our proprietary artificial intelligence** mechanisms in natural language, in its original form, identifying its logic and emotional tone.

This results in the Sentiment Score — a synthetic index that expresses the degree of satisfaction based on 100, or the share of positive judgments within the set of all the contents analysed. Additionally, for each content, this polarity score is complemented by the identification of main topics, related subjects (clusters), and opinions.

Over the years, numerous other techniques have been developed, including the rates checker for the hospitality industry, involving the collection of daily rates (monitored several times a day) published on Online Travel Agencies (OTAs). Utilising sophisticated dedicated Business Intelligence tools and Data Visualisation techniques, this data is made available interactively through our D / AI Destinations platform. This allows each type of user to access all the necessary information autonomously.

The Data Appeal Company SpA (formerly Travel Appeal) was acquired in 2022 by Almawave Spa, a company listed on the Euronext Growth Milan market of Borsa Italiana and is part of the Almaviva group

This report is the outcome of an analysis of 40 million online pieces of content from 2nd September 2022 to 31st August 2023 (unless otherwise specified). The focus is on around 876,000 points of interest in Italy across accommodation, local venues and restaurants, attractions, and short-term rentals sectors. The analysis of OTA (Online Travel Agency) rates, flights, and arriving passengers is extracted from the D / AI Destinations platform. The flight section data is provided by partner Travelport and is related to major international Global Distribution Systems (GDS). Awards and recognitions are based on methodologies outlined in individual descriptions.

For additional information, please contact: info@datappeal.io.

The Awards

2023 Edition

Cashless Destination Award

Destination with the highest use of electronic payments

Destination Sustainability Index Award

Destination that recorded the highest Sustainability Index average in 2022

Inclusivity Index Award

Destination that recorded the highest Inclusivity Index average in 2022

Inclusivity
Index Award

BOLOGNA

Destination that recorded the highest Inclusivity Index
average in 2022

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European Destination Most Appreciated by Italian Visitors

European destination offering Italians travellers the highest satisfaction-to-popularity ratio

AlmavivA   alpitour   BW | Best Western. Hotels & Resorts   HBenchmark Hospitality Data Intelligence   onde alte   Maggioli   ALMAWAVE GROUP

European Destination
Most-Appreciated
by Italian Visitors

CRETE

European destination offering Italian travellers the highest
satisfaction-to-popularity ratio

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AlmavivA · alpitour · BW | Best Western Hotels & Resorts · HBenchmark Hospitality Data Intelligence · onde alte · Maggioli · ALMAWAVE GROUP

Almawave Smart Destination Award

SPECIAL AWARD

2023

AlmavivA · alpitour · BW | Best Western Hotels & Resorts · HBenchmark Hospitality Data Intelligence · onde alte · Maggioli · ALMAWAVE GROUP

Secondary City Award

The leading secondary city within smaller centers, fulfilling performance criteria and exhibiting strong economic capacity

Destination Most Appreciated by Foreign Travellers

The destination with the highest Sentiment in all analysed sectors, in relation to the average amount of content for active points of interest (POI)

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AlmavivA   alpitour   BW | Best Western. Hotels & Resorts   HBenchmark Hospitality Data Intelligence   onde alte   Maggioli   ALMAWAVE GROUP

LANGHE MONFERRATO ROERO PIEDMONT

1° LANGHE MONFERRATO ROERO (PIEDMONT)	2° DOLOMITI PAGANELLA (TRENTINO)	3° VALLE D'ITRIA - MURGIA DEI TRULLI (APULIA)

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THE **DATA APPEAL** COMPANY

AlmavivA

alpitour

BW | Best Western. Hotels & Resorts

HBenchmark Hospitality Data Intelligence

onde alte

Maggioli

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