All Italian Data

REPORT 2024

ITALIA DESTINAZIONE DIGITALE
THE DATA APPEAL COMPANY
ALMAWAVE
AlmavivA

ITALY DIGITAL DESTINATION

What is Italy Digital Destination?

The Italy Digital Destination Award is Italy’s first and only recognition dedicated to honouring Italian regions that have achieved the highest online performance in the past year.

The award was created by The Data Appeal Company in 2016, and is granted based on an in-depth analysis of billions of online conversations about accommodation, attractions, and dining, combined with industry trends, travel flows, bookings, and hotel and flight prices.

The result is the most comprehensive and detailed analysis of the state of Italy’s tourism offering, as experienced and shared by the visitors themselves.

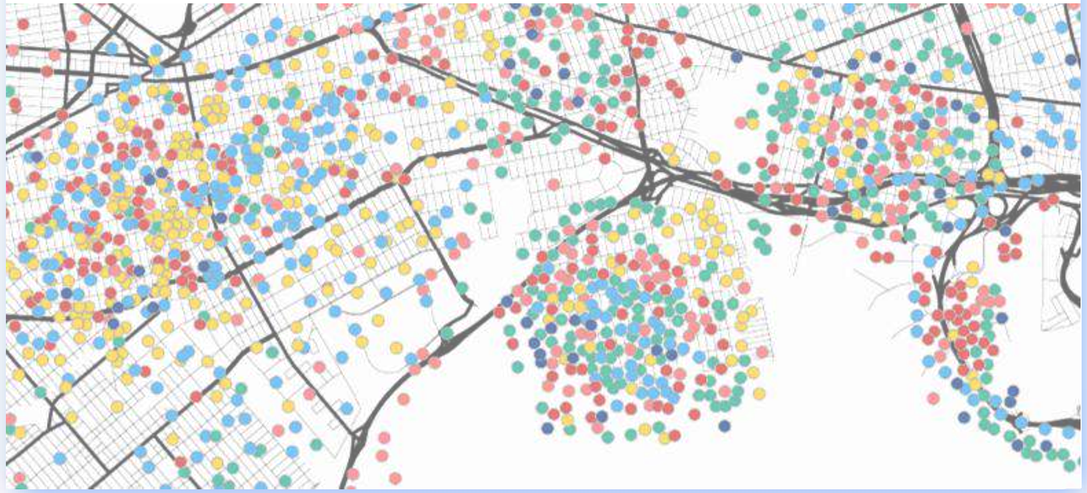
#IDD2024, the latest edition, has been refreshed and expanded to include additional channels and sectors, focusing on current trends in Italian tourism.

THE DATA APPEAL COMPANY

IDD 2024 data

797K

POINTS OF INTEREST



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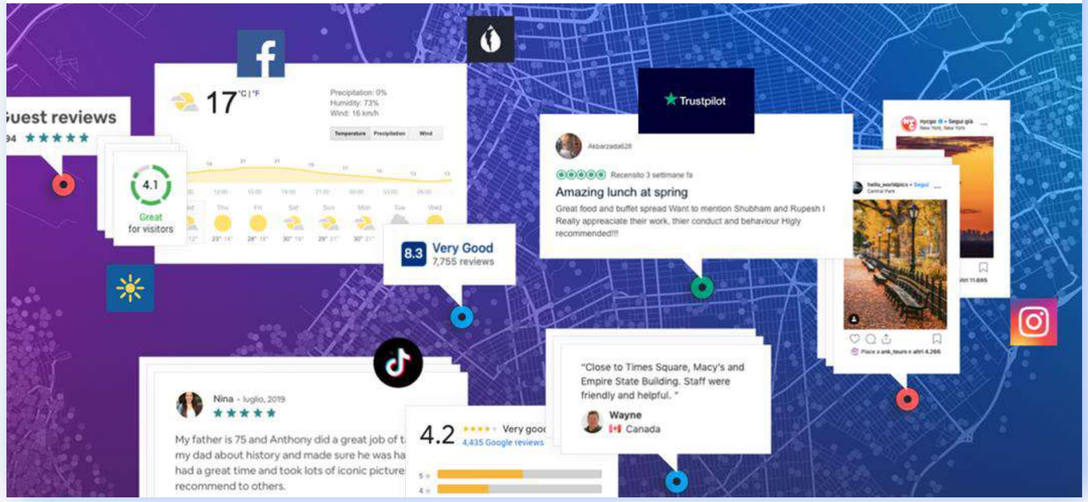
DIGITAL TRACES

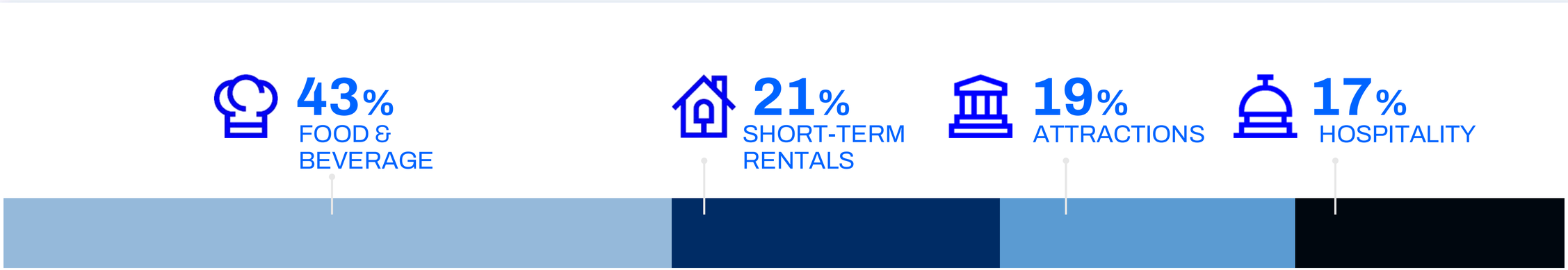


SEPT 2023 AUG 2024

#IDD2024

What makes up Italy's tourism offer?

Distribution of points of interest by industry



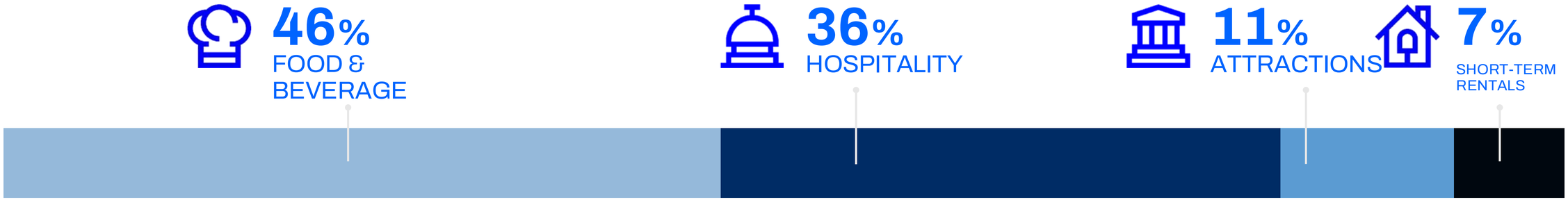
Main platforms monitored:

SEPT 2023 - AUG 2024

#IDD2024

Online content volume

Distribution of content volume by point of interest type



Main platforms monitored:

SEPT 2023 - AUG 2024

Italy Digital Destination Awards

2024 Edition

The impact of events on tourism

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

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#IDD2024

The impact of events on tourism

Giro D'Italia — Sports

4 May - 26 May 2024

Events impact	Pred. attendance	Pred. spending
High	2,100,000	153,355,517€

Predicted spending	153,355,517€
Hospitality	42,507,583€
Food and beverage	92,006,952€
Transportation	18,840,981€

Tour de France - Florence - Rimini

29 June 2024

Events impact	Pred. attendance	Pred. spending
High	730,000	56,137,212€

Predicted spending	56,137,212€
Hospitality	16,559,687€
Food and beverage	30,402,978€
Transportation	9,174,545€

La Biennale di Venezia — Expos

20 Apr - 24 Nov 2024 - Venice

Events impact	Pred. attendance	Pred. spending
High	800,000	130,420,817€

Predicted spending	130,420,817€
Hospitality	63,146,078€
Food and beverage	53,750,774€
Transportation	13,523,963€

Artigiano in Fiera

2 Dic - 10 dic 2023 - Milan

Events impact	Pred. attendance	Pred. spending
High	1,000,000	162,739,677€

Predicted spending	162,739,677€
Hospitality	76,368,852€
Food and beverage	68,086,816€
Transportation	18,284,008€

Lucca Summer Festival — Festivals

2 Jun - 26 Jul - Lucca

Events impact	Pred. attendance	Pred. spending
High	523,000	32,402,778€

Predicted spending	32,402,778€
Hospitality	7,175,517€
Food and beverage	17,489,975€
Transportation	7,737,286€

Umbria Jazz Festival

12 Jul -21 Jul 2024 - Umbria

Events impact	Pred. attendance	Pred. spending
High	450,000	28,362,402€

Predicted spending	28,362,402€
Hospitality	5,208,375€
Food and beverage	13,474,406€
Transportation	9,679,621€

#IDD2024

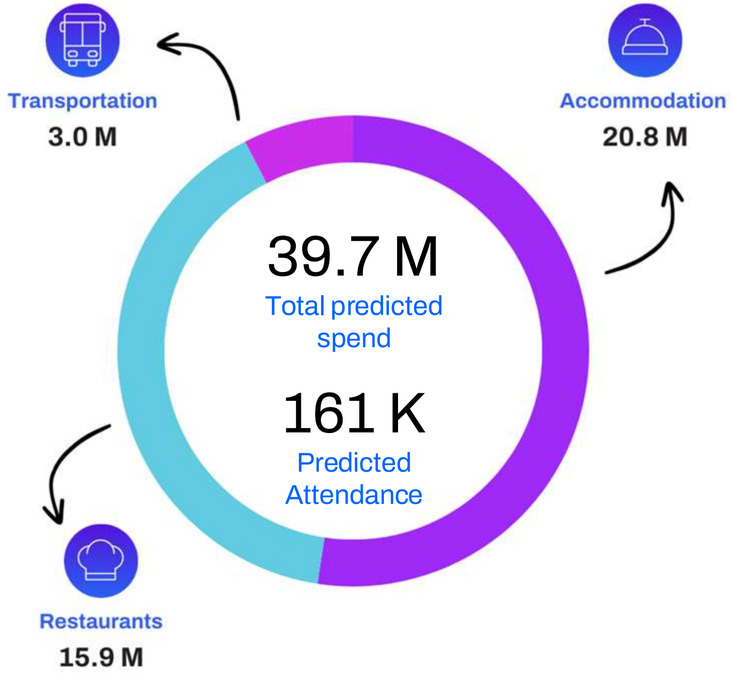
The impact of events on tourism

25 Mag

AC/DC and The Pretty Reckless

13 / 14 Lug

Taylor Swift - The Eras Tour



Italy Digital Destination Awards

2024 Edition

Overtourism
Focus on Milano, Florence and San Gimignano

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

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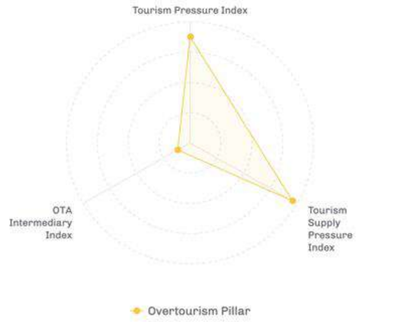
Overtourism: Major cities and tourist-driven municipalities

Overtourism Pillar



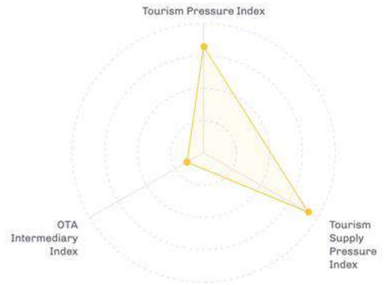
Overtourism Pillar	**75,7** /100
Tourism Pressure Index	**87,8** /100
Tourism Supply Pressure Index	**95,6** /100
OTA Intermediary Index	**11,5** /100

Milan

Seasonal Balance

+17,8 Compared to previous year

Overtourism Pillar



Overtourism Pillar	**72,4** /100
Tourism Pressure Index	**82,2** /100
Tourism Supply Pressure Index	**91,6** /100
OTA Intermediary Index	**14,5** /100

Florence

Seasonal Balance

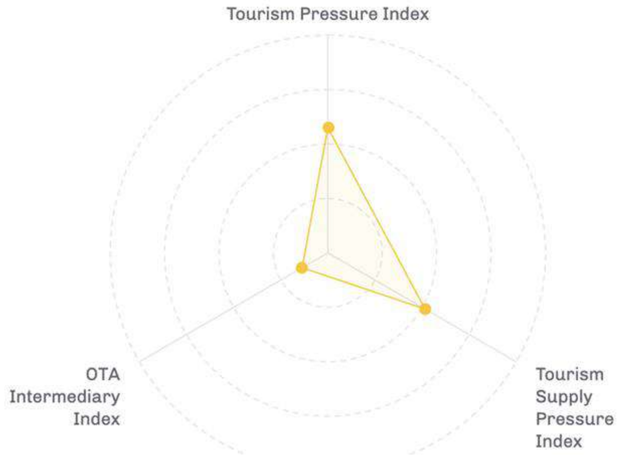
+16,0 Compared to previous year

Overtourism: Major cities and tourist-driven municipalities

San Gimignano

OVERTOURISM PILLAR

Questo pillar valuta l'impatto del turismo eccessivo in una destinazione.



Overtourism Pillar	**46,4** /100
Tourism Pressure Index	**57,5** /100
Tourism Supply Pressure Index	**51,6** /100
OTA Intermediary Index	**13,6** /100

SEASONAL BALANCE

This score measures stability of your destination compared to seasonal fluctuations during the past year. A high score indicated a constant influx of travellers.

+5,6 Compared to previous year

OVERTOURISM

Data Appeal and BVA Doxa partner for sustainable tourism

Data Appeal and BVA Doxa have partnered to analyse how the rise in tourist numbers affects destinations and to develop a tourism strategy that prioritizes local residents, leveraging Big Data and Artificial Intelligence.

THE DATA APPEAL COMPANY

Italy Digital Destination Awards

2024 Edition

Trends: 2023 - 2024

ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

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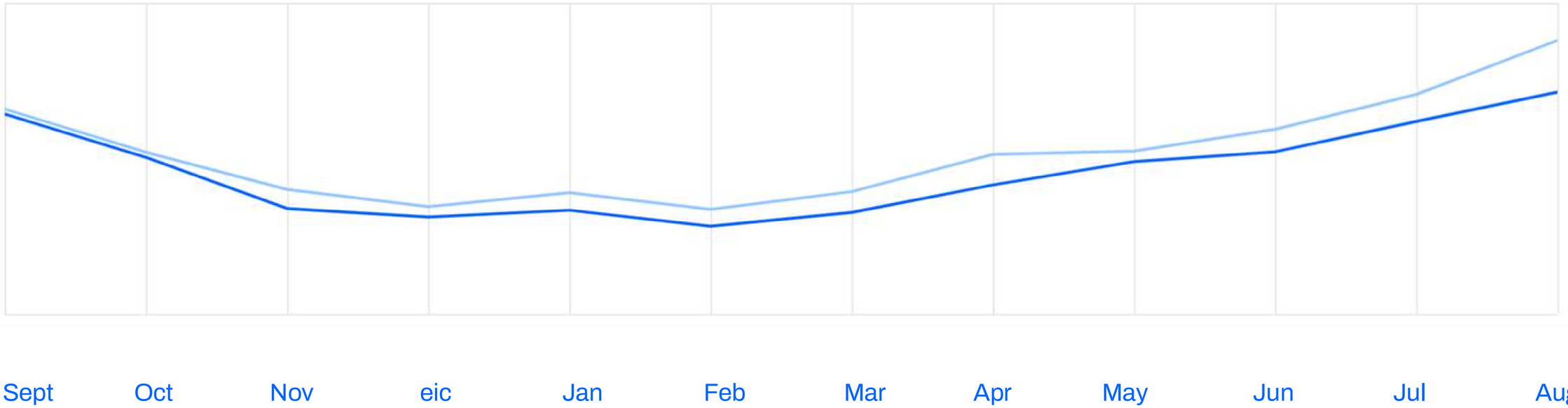
Seasonality

Set 2022 - Ago 2023

Set 2023- Ago 2024

Content volume over time



#IDD2024

Average OTA rates and saturation

SEPT 2023- AUG 2024

OTA SATURATION

Estimation of the current saturation, (occupancy), level in your destination.

37.2%

-7.2 Compared to previous year

Min. rate	Avg. rate	Max. rate
79€	131€	272€
+7.6%	+9.0%	+9.6%

Min. — Max.

HOSPITALITY

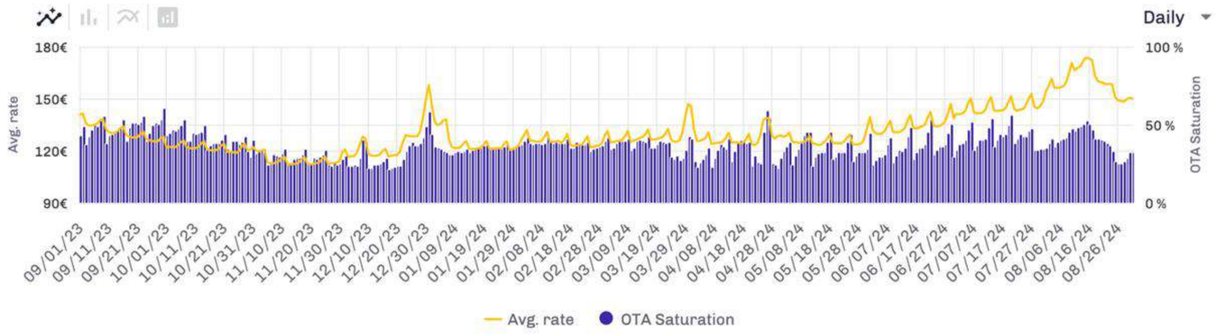
37.4%

-6.8 Compared to previous year

Min. rate 80€

Avg. rate 135€

Max. rate 288€



SHORT TERM RENTALS

37.4%

-9.1 Compared to previous year

Min. rate 77€

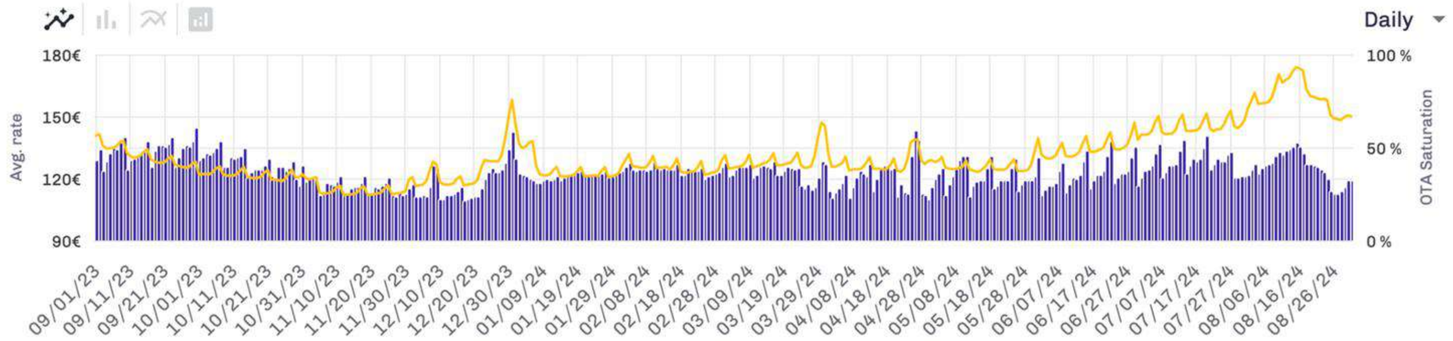
Avg. rate 121€

Max. rate 220€

#IDD2024

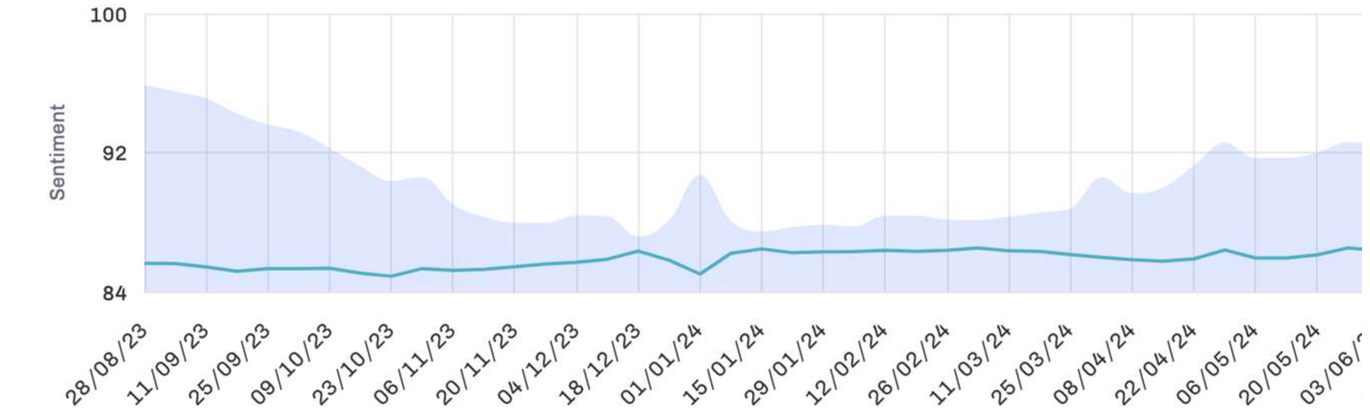
Average accommodation rates and sentiment

Sept 2023- Aug 2024



Average rate

OTA saturation

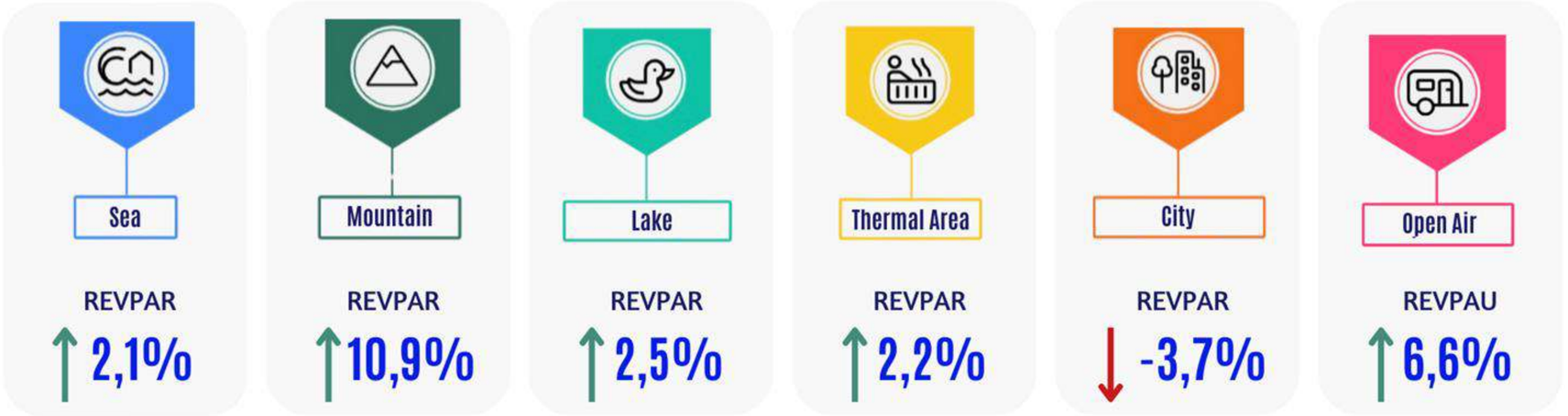


Sentiment

Volume of digital traces

Variation in Revenue per Available Room

June - September 2024 vs 2023



SELECTED PROPERTIES	SAMPLE ROOMS/UNITS	TOTAL REVENUE - SUMMER 2024	SUMMER 2024 VS 2023
1.397	89.495	€ 1,2 MLD	↑ € 35,1M

SOURCE: HBenchmark Hospitality Data Intelligence

#IDD2024

Visitor origin by country

SEPT 2023- AUG 2024

84/100
FOREIGN VISITOR SENTIMENT

+1.5% compared to the previous year ▲

	Digital traces distribution ↓	Sentiment
Italy	**41.8%**	**85.3**/100
Germany	**8.8%**	**85.6**/100
France	**5.9%**	**85.1**/100
United Kingdom	**3.7%**	**86.9**/100
Spain	**3.3%**	**83.2**/100

#IDD2024

Visitor types

SEPT 2023- AUG 2024

	Digital traces distribution ↓	Sentiment
Couples	47.9%	86.3/100
Families	29%	85.6/100
Group	12.6%	85.5/100
Single	10.1%	84.3/100
Business	0.5%	82.5/100

#IDD2024

The forecast for the next six months

OCT 2024 - MAR 2025

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.

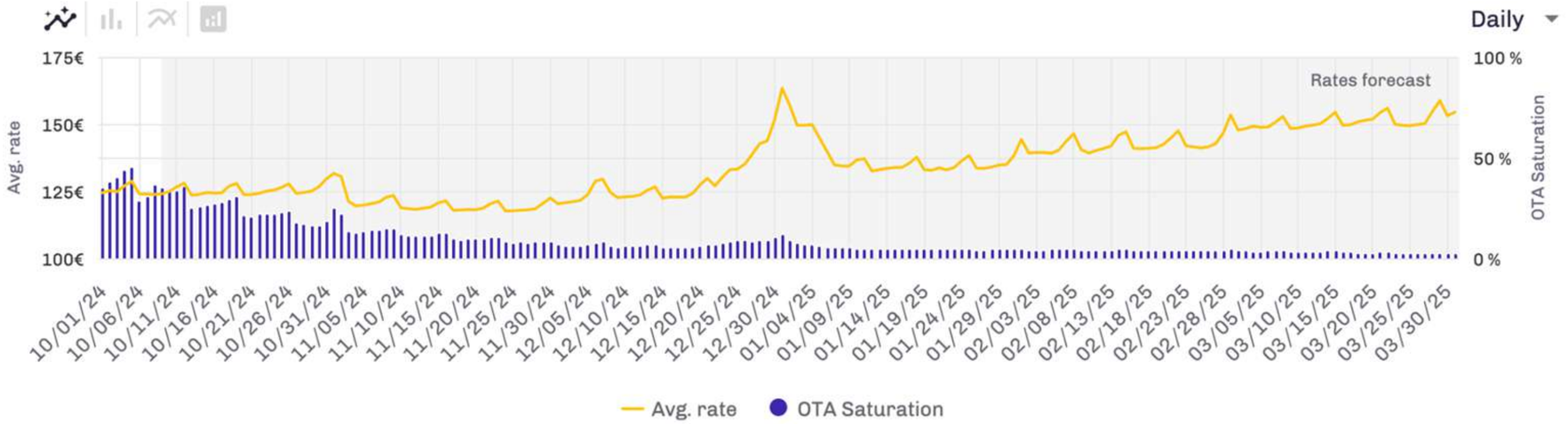
OTA SATURATION

11,8%

OTA RATES

130€

+5,8%



#IDD2024

Incoming passengers over the next six months

SEPT 2024 - MAR 2025

Confirmed passengers

1,2M

▲ 7,4%

Booking window

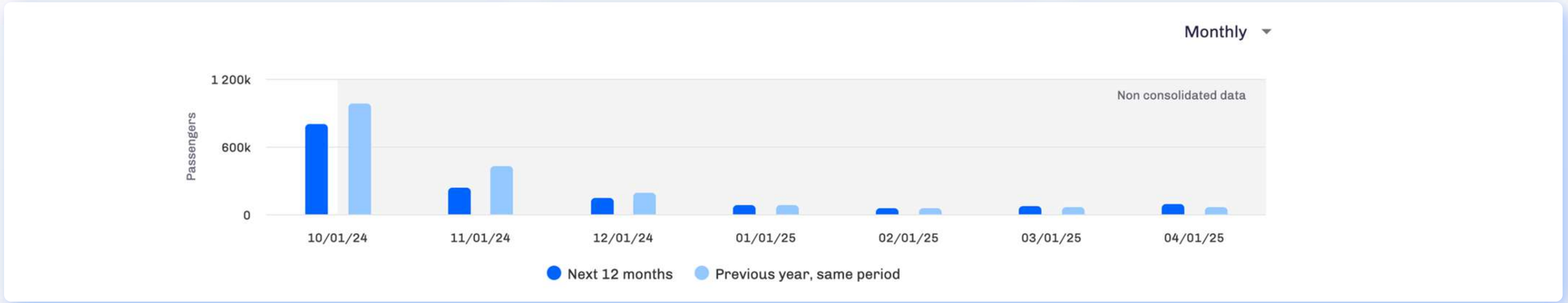
106,0 Days

▲ 5,1%

Length of stay

9,4 Nights

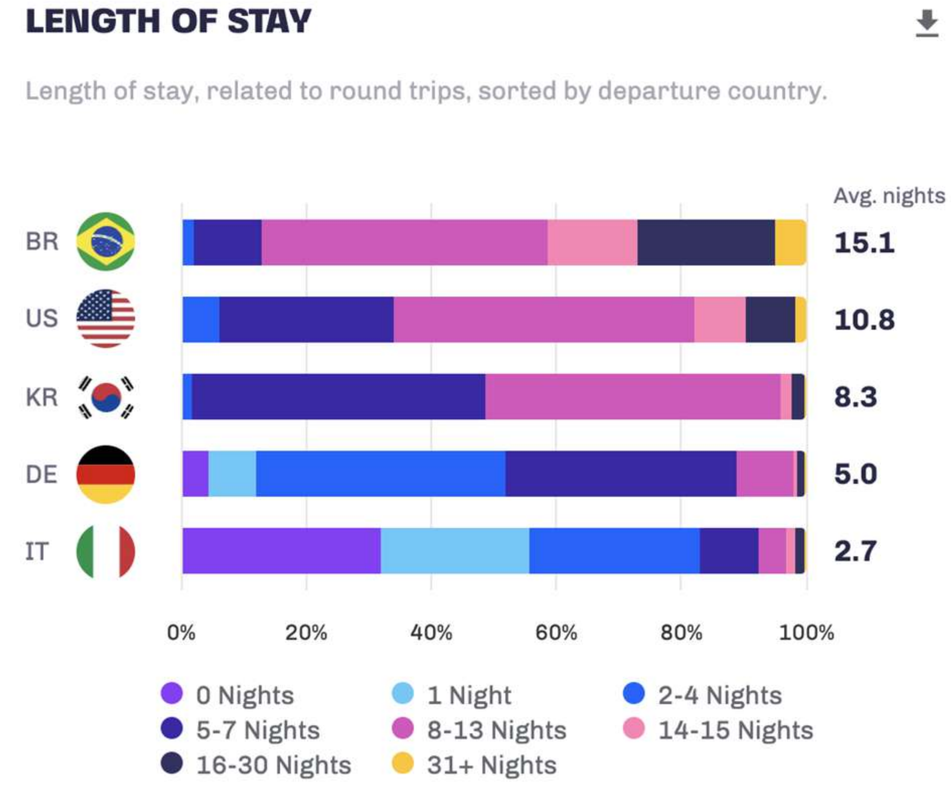
▼ -8,5%



#IDD2024

Incoming passengers over the next six months

SEPT 2024 - MAR 2025



#IDD2024

What attractions do visitors appreciate the most in Italy?

Top 10 Italian attractions based on content volume

SEPT 2023- AUG 2024

			CONTENT	SENTIMENT
6°	LEONARDO DA VINCI MUSEUM	Florence	**14.7 K**	**95.5** /100
7°	RIALTO BRIDGE	Venice	**13.6 K**	**93.2** /100
8°	PIAZZA NAVONA	Rome	**12.4 K**	**93.8** /100
9°	SPANISH STEPS	Rome	**11.6 K**	**91.3** /100
10°	THE VERONA ARENA	Verona	**10.1 K**	**92.9** /100

MILAN

4° Milan Cathedral

CONTENT 17.5 K
SENTIMENT 95

PISA

ROME

1° Trevi Fountain

CONTENT 31.6 K
SENTIMENT 93.4

3° Leaning Tower of Pisa

CONTENT 17.7 K
SENTIMENT 94.1

2° Colosseum

CONTENT 23.3 K
SENTIMENT 94.1

5° Pantheon

CONTENT 15.5 K
SENTIMENT 93.6

THE DATA APPEAL COMPANY

ALMAWAVE GROUP

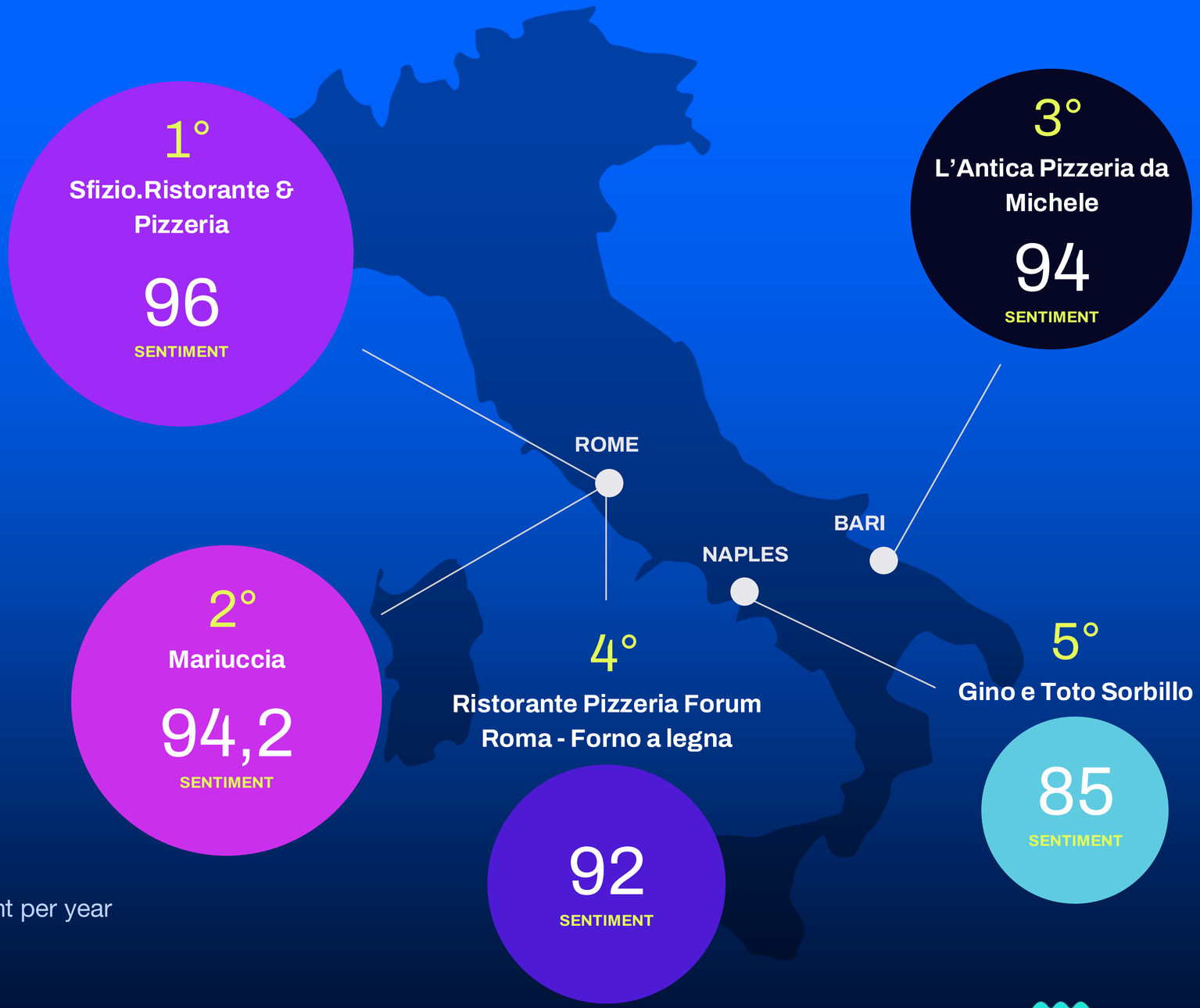
#IDD2024

Focus: The most appreciated pizzerias in Italy

Pizzerias with the highest Sentiment Score

SEPT 2023 - AUG 2024

Each POI analysed has over 3,000 pieces of content per year



Italy Digital Destination Awards

2024 Edition

Hospitality analysis

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

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HOSPITALITY

Digital presence

135 K

ACCOMMODATION OPTIONS IN ITALY

OF WHICH

89 %

HAVE BEEN ACTIVE IN THE PAST 6 MONTHS

Category	Distribution	Content	Sentiment
HOTEL	40%	62.8%	84.6 /100
B&B	34%	26.8%	88.4 /100
FARMHOUSE	13%	3.8%	90.9 /100
CAMPSITE	2%	2.2%	83.4 /100
OTHER	11%	4.4%	87.2 /100

Macro areas

86 /100

AVERAGE SENTIMENT
IN ITALY

+0.5 ▲

COMPARED TO THE PREVIOUS PERIOD

NORTHERN ITALY
+0,6 points

85.6 /100
GUEST SENTIMENT:
Hospitality

CENTRAL ITALY
+0,9 points

84.7 /100
GUEST SENTIMENT:
Hospitality

SOUTHERN ITALY
+0,6 points

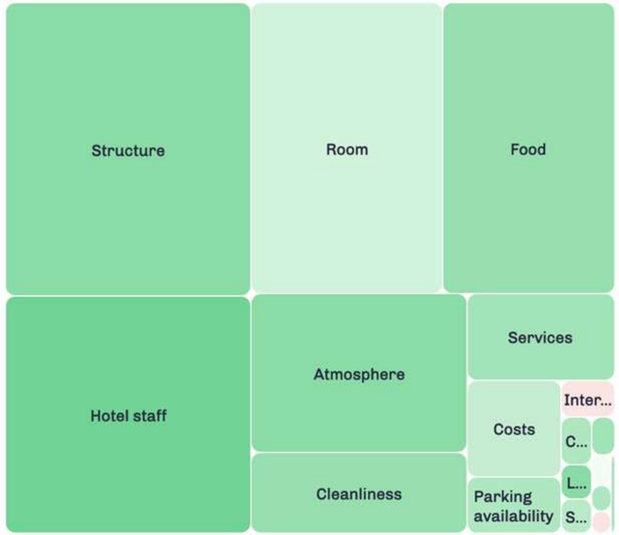
87.4 /100
GUEST SENTIMENT:
Hospitality

Most-discussed topics

	Sentiment		Content	
Structure	89,4 /100	▲	23%	▲
Staff	94,2 /100	▲	18%	▼
Room	71,8 /100	▼	18%	▼
Food	87,6 /100	▲	16%	▼
Atmosphere	90,1/100	▲	11%	▼
Cleanliness	87,5 /100	▲	5%	▼
Services	83,7 /100	▲	4%	▲
Value for money	73,3 /100	▲	3%	▲
Transfers and parking	81,4 /100	▲	2%	▲

86 /100

AVERAGE SENTIMENT IN ITALY



Italy Digital Destination Awards

2024 Edition

Short-term rentals analysis

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

ALMAWAVE

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Digital presence

166 K

SHORT-TERM RENTALS IN ITALY

OF WHICH

86 %

SHORT-TERM RENTALS IN ITALY

Category	Distribution	Content	Sentiment
HOUSE/APARTMENT	61%	51.5%	91.7 /100
GUESTHOUSE	30%	37.4%	88.9 /100
HOLIDAY APARTMENT	9%	11.1%	90.2 /100

Macro areas

90.9 /100

AVERAGE SENTIMENT
IN ITALY

+0.4

COMPARED TO THE PREVIOUS PERIOD

NORTHERN ITALY
+0,0 points

90,1 /100
GUEST SENTIMENT: **Short-term rentals**

CENTRAL ITALY
+0,3 points

90,5 /100
GUEST SENTIMENT: **Short-term rentals**

SOUTHERN ITALY
+0,4 points

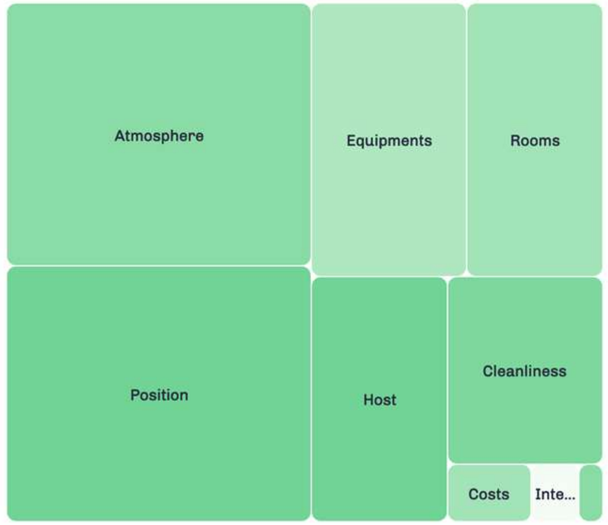
90,9 /100
GUEST SENTIMENT: **Short-term rentals**

Most-discussed topics

	Sentiment		Content	
Atmosphere	89,8 /100	=	26%	=
Position	95,0 /100	=	26%	=
Amenities	80,1 /100	▲	14%	=
Room	84,5 /100	▲	12%	▼
Host	94,8 /100	▲	11%	=
Cleanliness	91,3 /100	▲	9%	▼
Costs	83,0 /100	▲	1%	▼
Internet	61,3 /100	▲	1%	▼

90.9 /100

AVERAGE SENTIMENT IN ITALY



Italy Digital Destination Awards

2024 Edition

Food and Beverage analysis

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

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AlmavivA

Digital presence

344 K

FOOD AND BEVERAGE BUSINESSES IN ITALY ACTIVE ONLINE

OF WHICH

89 %

HAVE BEEN ACTIVE IN THE PAST 6 MONTHS

Category	Distribution	Content	Sentiment
RESTAURANT	37%	52.9%	87.0/100
BAR	25%	10.2%	85.6 /100
PIZZERIA	12%	15.4%	86.9 /100
GELATERIA	4%	3.4%	89.0 /100
OTHER	22%	18.1%	86.2 /100

Macro areas

86.7 /100

AVERAGE SENTIMENT IN ITALY

+0.3 ▲

COMPARED TO THE PREVIOUS PERIOD

NORTHERN ITALY
+ 0.3 points

86.6 /100
CUSTOMER SENTIMENT:
dining establishments

CENTRAL ITALY
+0.5 points

87.4 /100
CUSTOMER SENTIMENT:
dining establishments

SOUTHERN ITALY
+0.2 points

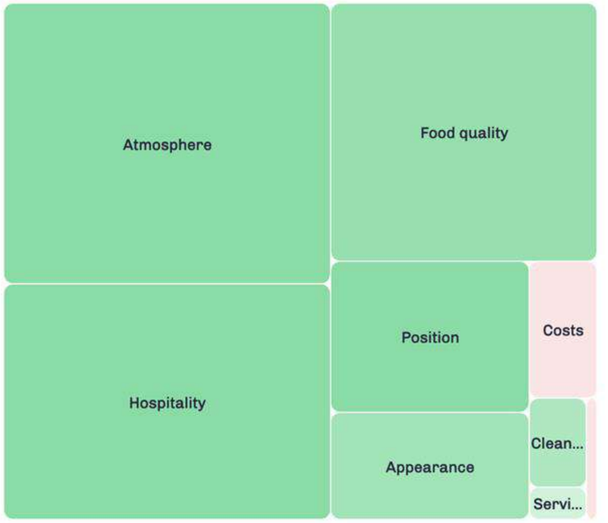
86.7 /100
CUSTOMER SENTIMENT:
dining establishments

Most-discussed topics

	Sentiment		Content	
Atmosphere	88,3/100	▼	30%	=
Hospitality	90,1 /100	▼	25%	=
Food quality	85,6 /100	▼	23%	=
Position	90,7 /100	▼	10%	=
Appearance	84,7 /100	▲	7%	▲
Costs	52,2 /100	▲	3%	=
Cleanliness	81,2 /100	▼	2%	=
Services	71,9/100	▼	0,6%	▼
Organisation	58,4 /100	▼	0,4%	▲

86.7 /100

AVERAGE SENTIMENT IN ITALY



Italy Digital Destination Awards

2024 Edition

Attractions analysis

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

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Digital presence

152 K

ATTRACTIONS IN ITALY ACTIVE ONLINE

OF WHICH

73 %

HAVE BEEN ACTIVE IN THE PAST 6 MONTHS

Category	Distribution	Content	Sentiment
ATTRACTION	20%	29.3%	91.4 /100
PARK	14%	8.6%	88.7 /100
MUSEUM	9%	15.6%	92.1 /100
BATHING ESTABLISHMENT	8%	8.0%	85.0 /100
OTHER	49%	20.9%	92.9 /100

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

Macro areas

91.1 /100

AVERAGE SENTIMENT IN ITALY

+0.2▲

COMPARED TO THE PREVIOUS PERIOD

NORTHERN ITALY

+0,2 points

91.2 /100

VISITOR SENTIMENT: **Attractions**

CENTRAL ITALY

+0,2 points

92.0 /100

VISITOR SENTIMENT: **Attractions**

SOUTHERN ITALY

+0,2 points

90.2 /100

VISITOR SENTIMENT: **Attractions**

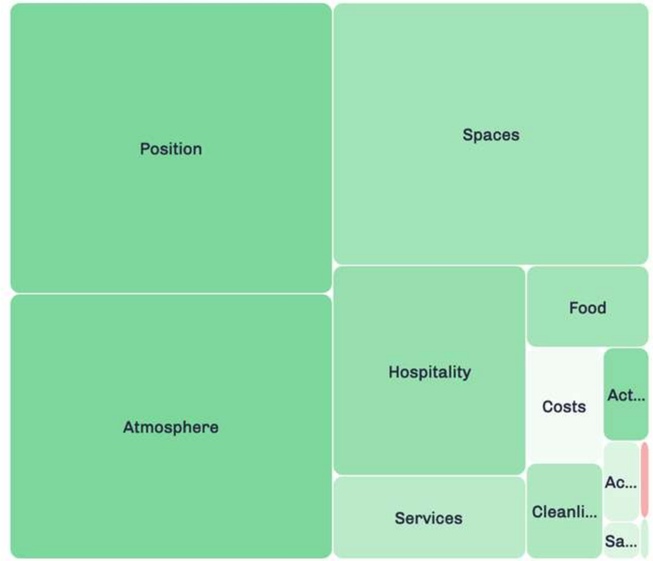
ATTRACTIONS

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% ▼
Cost	61.0 /100 ▲	3% ▲
Activities	89.7 /100 ▼	1% ▲
Accessibility	68.6 /100 ▼	1% ▲

91.1 /100

AVERAGE SENTIMENT IN ITALY



#IDD2024

Key data - “All Italian Data 2024”

- **Decrease in POIs and reviews:** Compared to last year, points of interest have fallen from 876,000 to 797,000, and online reviews from 40 million to 32 million. This trend may reflect the decline in domestic tourism due to reduced economic availability and rising prices, especially in accommodation facilities.

- **Rate increase:** Analyses indicate an average increase of over 9% in hotel and short-term rental rates published on OTAs over the past year. Projections for the period of October to March 2024 indicate an additional increase of 6%, bringing the average rate to approximately 130 euros per night.

- **Domestic vs. international tourism decline:** Data on Italian travellers reveals a drop in both the number of flights and the average duration of stays. However, in the upcoming six months, GDS flights are expected to increase by 7.4% compared to the same period last year. Additionally, there is a rise in visitor numbers from the United States, Germany, France, and South Korea.

- **Foreign visitors account for 58.2% of the total**, marking a 1.5% increase from the previous year. After Italy, the main countries of origin are Germany, France, the United Kingdom, and Spain. Overall satisfaction among foreign visitors is high, with a score of 84 out of 100, reflecting the strong appeal of the Italian tourism experience.

- **Focus on overtourism**: Comparing large cities with small towns that have a strong tourism appeal, such as San Gimignano, the latter appear more vulnerable due to their seasonal focus during the summer months and limited accommodation availability. In all cases, reliance on OTAs highlights the potential to reduce intermediaries, revealing significant room for improvement.

- **Accommodation**: Approximately 135,000 establishments were analysed, achieving a sentiment score of 86 out of 100. The staff received the highest praise (94/100), while the quality of the rooms and value for money remain critical concerns.

- **Short-term rentals:** Holiday homes and apartments account for approximately 166,000 listings online. Traveller sentiment is on the rise, reaching a score of 90.9 out of 100. The location of the accommodations and the hospitality of the hosts are the most appreciated factors.

- **Dining and hospitality**: The restaurant sector has seen the analysis of approximately 344,000 establishments. The average sentiment remains stable at 86.7 out of 100; however, the service and cleanliness have been the most criticised aspects.

- **Cultural attractions**: The analysed attractions, totalling 152,000, maintain the highest sentiment score at 91 out of 100. Visitors particularly appreciate the location and atmosphere, while cost and accessibility continue to be areas for improvement.

Methodology

ITALIA DESTINAZIONE DIGITALE

THE DATA APPEAL COMPANY

ALMAWAVE

AlmavivA

#IDD2024

Metodology

The Data Appeal Company is a **provider of alternative data**. Using its proprietary techniques, it collects and monitors the digital presence of **points of interest (POIs) in an area by analysing numerous platforms, websites, OTAs, and social media**, ranging from the most well-known to more specialised ones by sector.

The data retrieval methodology involves a unique identification process through an algorithm designed to **maximise the likelihood that the channels explored are related to the same POI**.

After a complex data quality process, each identified POI is examined for specific characteristics—such as location, type, and services—as well as visitor attributes, including origin, language, and travel type. The contents of the digital human experience (reviews, ratings, comments, scores, etc.) are read and semantically analysed using proprietary natural language artificial intelligence mechanisms in their original form to identify underlying logic and emotional tone.

The main outcome is the Sentiment Score, a synthetic index that expresses the level of satisfaction on a scale of 100, representing the proportion of positive reviews within the total set of analysed content.

To each polarity score for every piece of content, we add the **main topics, aspects, and related opinions**. Over the years, numerous techniques have been developed, including a rates checker for hospitality, which collects daily rates (monitored multiple times a day) published on OTAs. Through sophisticated dedicated Business Intelligence tools and Data Visualisation techniques, the data is presented interactively via the D / AI Destinations platform, allowing all types of users to access the necessary information independently.

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 part of the AlmavivA group.

This report is the result of an analysis of 32 million online content pieces from 1 September 2023 to 31 August 2024 (unless specified otherwise) concerning approximately 797,000 points of interest in Italy across the sectors of accommodation, dining and hospitality, attractions, and short-term rentals. The analysis of OTA rates, flights, and incoming passengers is sourced from the D / AI Destinations platform. Data in the Flights section is provided by the partner Travelport and pertains to the main international GDS. Awards and recognitions are derived from methodologies summarised in the individual descriptions.

For more information: info@datappeal.io

Award

2024 EDITION

S

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Cashless Destination Award

Destination with the most extensive use of electronic payments

Powered by: THE DATA APPEAL COMPANY

Cashless Destination Award

PIEDMONT

Destination with the most extensive use of electronic payments

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Almawave Smart Destination Award

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Almawave
Smart Destination
Award

PUGLIA

Destination that stands out for its innovative and data-driven approach to destination management

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Italy's Most Beloved Village

Village with the best balance between satisfaction levels and tourist popularity among the Orange Flag villages of the Italian Touring Club

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Premio
Premio Borgo
più Amato d'Italia

PECCIOLI, TUSCANY

1° PECCIOLI (TUSCANY)	**2°** RIPATRANSONE (MARCHE)	**3°** PETRALIA SOTTANA (SICILY)

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Destination Sustainability Index Award

Destination with the highest average score on the Sustainability Index

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Destination
Sustainability Index
Award

TRENTINO

Destination with the highest average score on the Sustainability Index

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Inclusivity Index Award

Destination with the highest average score on the Inclusivity Index

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Inclusivity Index Award

LOMBARDY

Destination with the highest average score on the Inclusivity Index

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European Destination Most Appreciated by Italian Visitors

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European location with the best balance between satisfaction and popularity for Italian travellers

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European Destination Most Appreciated by Italian Visitors

COMUNIDAD FORAL DE NAVARRA

SPAIN

1° COMUNIDAD FORAL DE NAVARRA (SPAIN)	**2°** CLARE ISLAND (IRELAND)	**3°** BRAGA (PORTUGAL)

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Destination Most Appreciated by Foreign Travellers

The destination with the highest sentiment score in the relevant sectors, based on the average amount of content for active points of interest (POI).

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Destination
Most Appreciated by
Foreign Travellers

MAIELLA NATIONAL PARK ABRUZZO

1° MAIELLA NATIONAL PARK (ABRUZZO)

2° PROSECCO HILLS (VENETO)

3° LANGHE MONFERRATO ROERO (PIEDMONT)

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Destination with the Best Gastronomic Offer

The region that registered the highest sentiment in the relevant categories for the Food / Quality of Food cluster.

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Destination with the Best Gastronomic Offer

RAGUSA, SICILY

1° RAGUSA (SICILY)	**2°** PAGANELLA DOLOMITES (TRENTINO)	**3°** CARNIA (FRIULI VENEZIA GIULIA)

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Destination with the Best Reputation

Destination with the best ratio of satisfaction to tourist popularity

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Destination with the Best Reputation

VENETO

1° VENETO	2° BASILICATA	3° TRENTINO

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