ID

All Italian Data

REPORT 2024

ID **ITALIA DESTINAZIONE DIGITALE**

THE **DATA APPEAL** COMPANY

ALMAWAVE

AlmavivA

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.
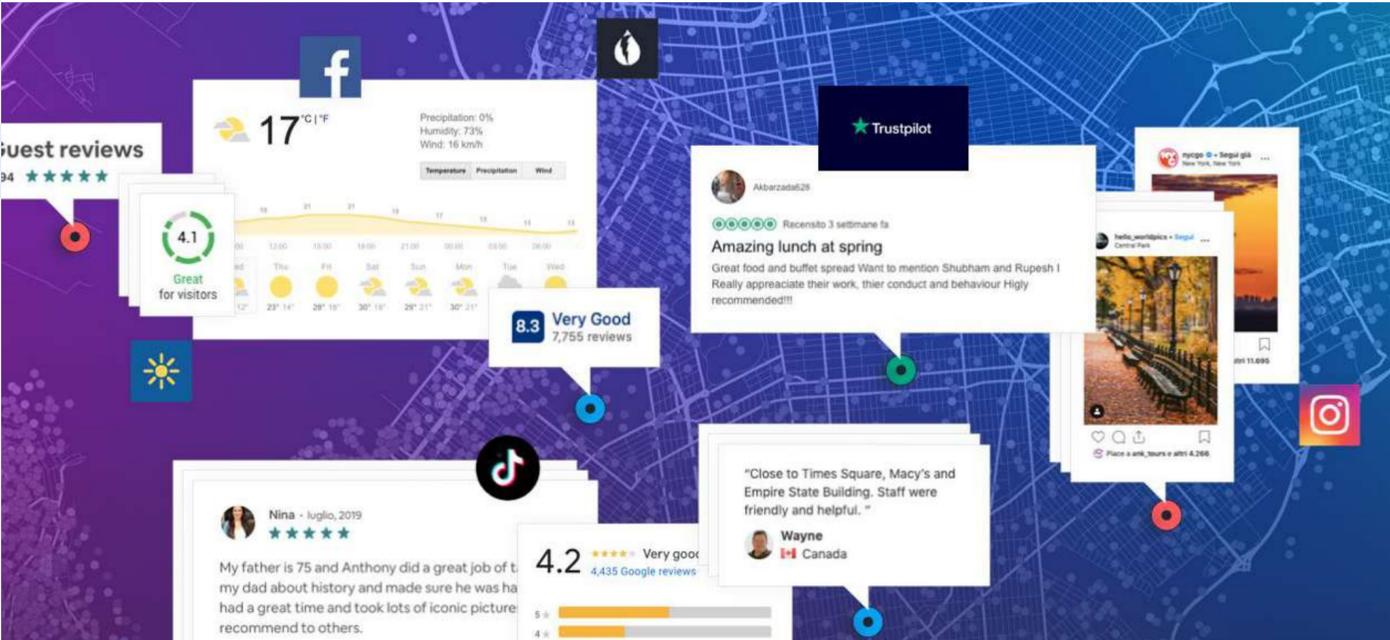
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IDD 2024 data

797K

POINTS OF INTEREST

32MLN

DIGITAL TRACES

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Online content volume

Distribution of content volume by point of interest type

46% FOOD & BEVERAGE

36% HOSPITALITY

11% ATTRACTIONS

7% SHORT-TERM RENTALS
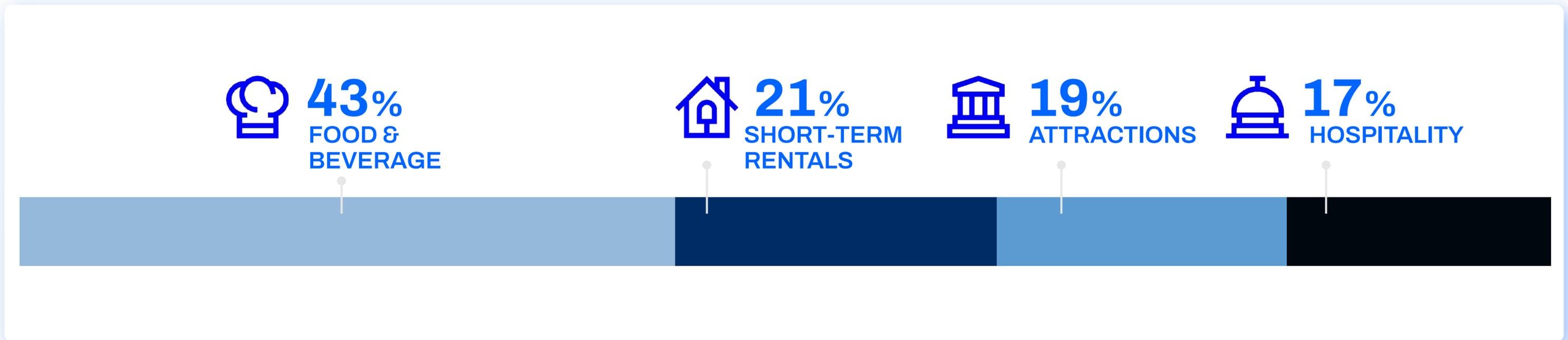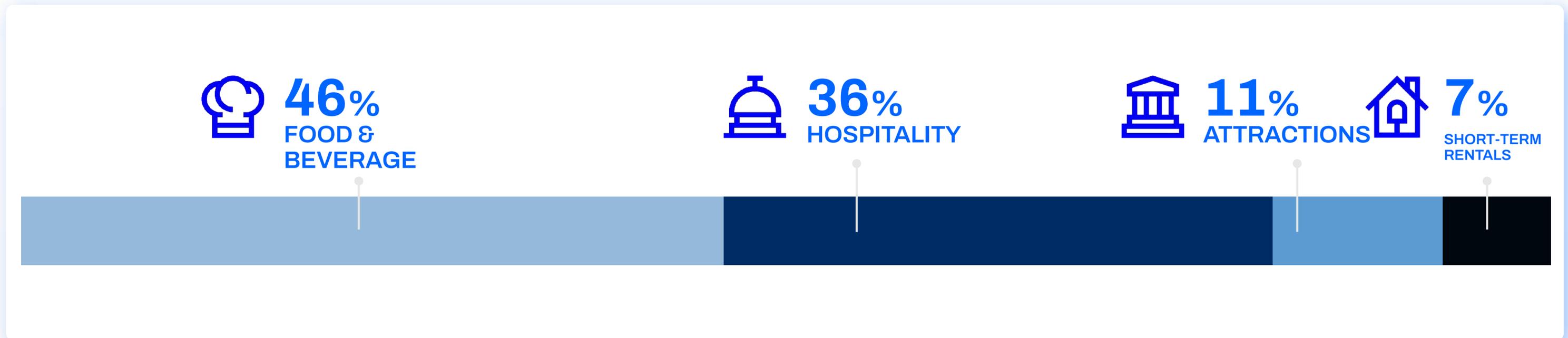
Main platforms monitored:

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The impact of events on tourism

Giro D'Italia
4 May - 26 May 2024   **Sports**

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
20 Apr - 24 Nov 2024 - Venice   **Expos**

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
2 Jun - 26 Jul - Lucca   **Festivals**

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

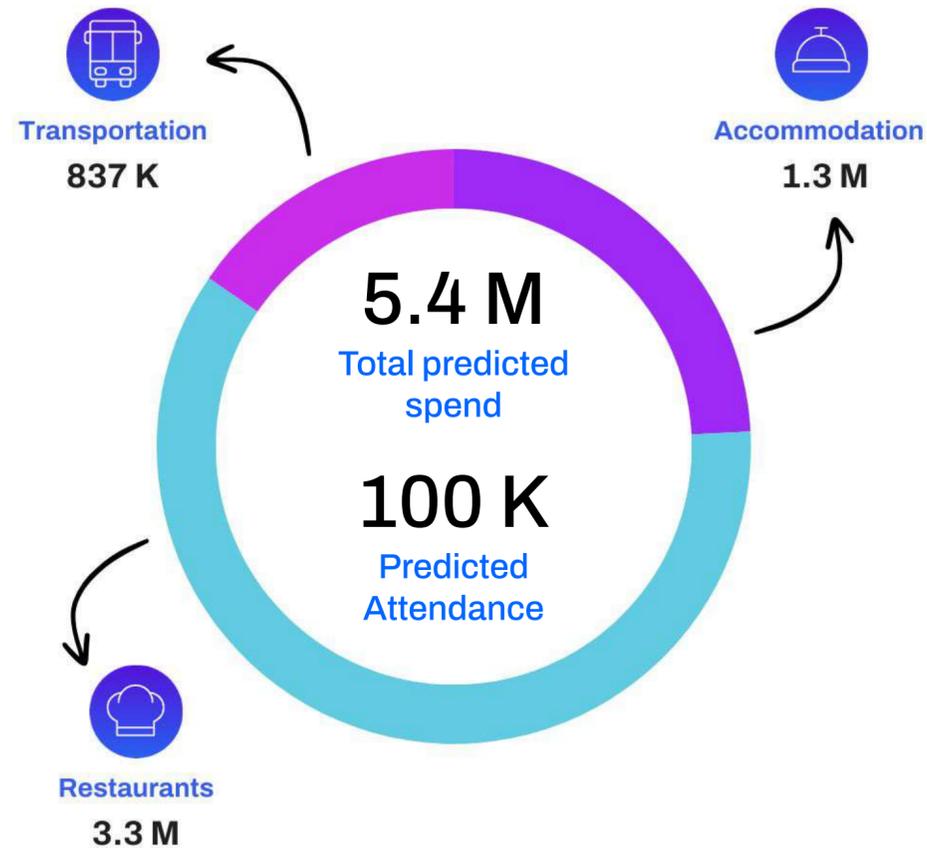|	
Predicted spending	32,402,778€
Hospitality	7,175,517€
Food and beverage	17,489,975€
Transportation	7,737,286€

Umbria Jazz Festival
12 Jul -21 Jul 2024 - Umbria

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

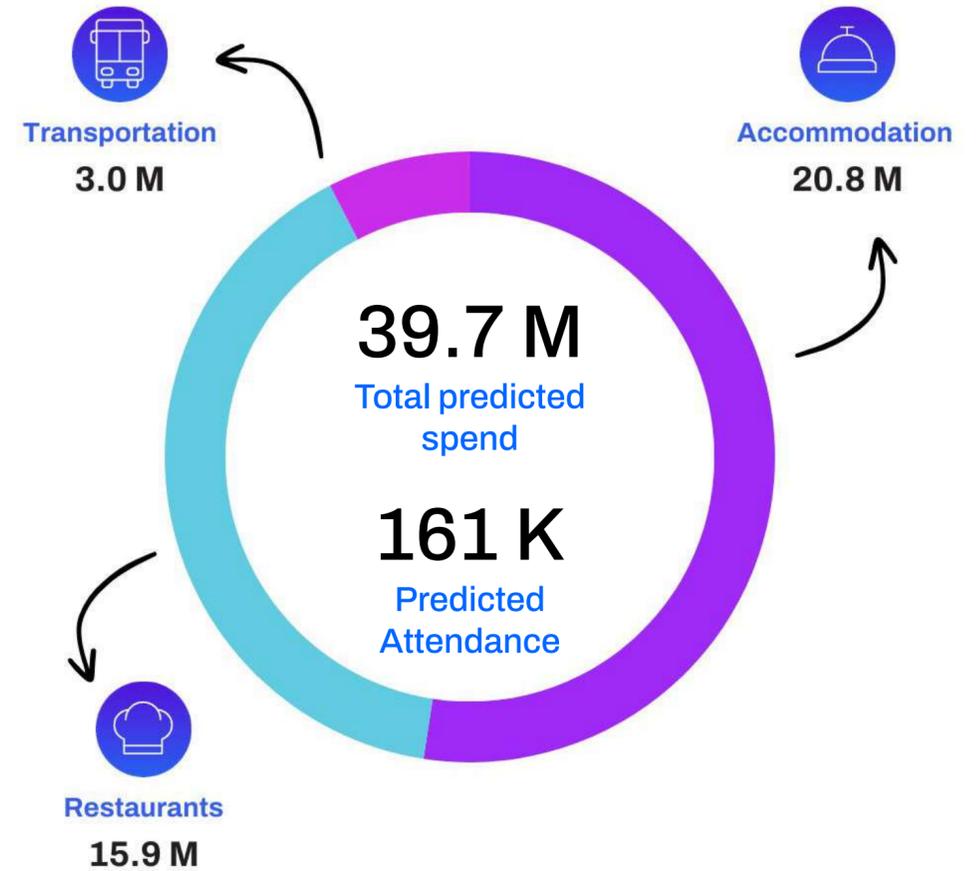|	
Predicted spending	28,362,402€
Hospitality	5,208,375€
Food and beverage	13,474,406€
Transportation	9,679,621€

The impact of events on tourism

25 Mag
AC/DC and The Pretty Reckless

Transportation
837 K

Accommodation
1.3 M

5.4 M
Total predicted spend

100 K
Predicted Attendance

Restaurants
3.3 M

13 / 14 Lug
Taylor Swift - The Eras Tour

Transportation
3.0 M

Accommodation
20.8 M

39.7 M
Total predicted spend

161 K
Predicted Attendance

Restaurants
15.9 M

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Italy Digital Destination Awards

2024 Edition

Overtourism
Focus on Milano, Florence and San Gimignano

Sept 2023 - Aug 2024

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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

Seasonality
92,4 /100

▲ +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

Seasonality
71,8 /100

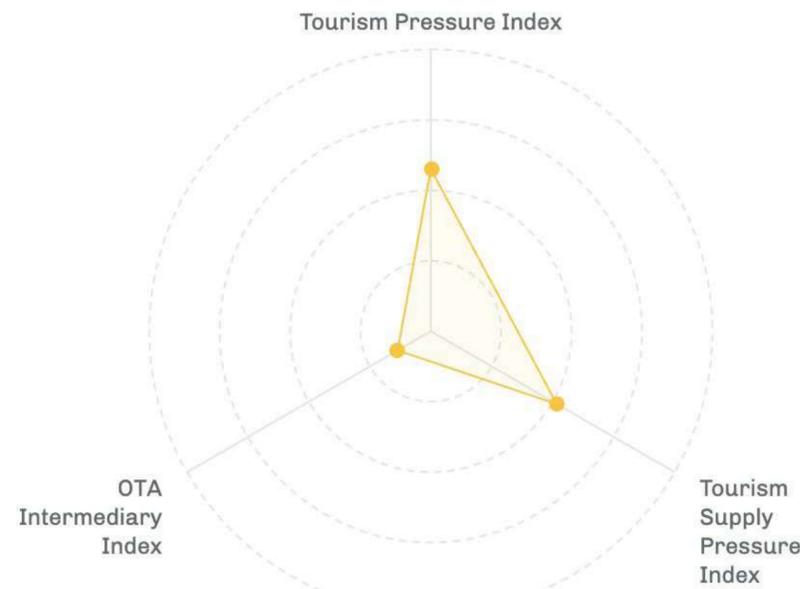▲ +16,0 Compared to previous year

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.
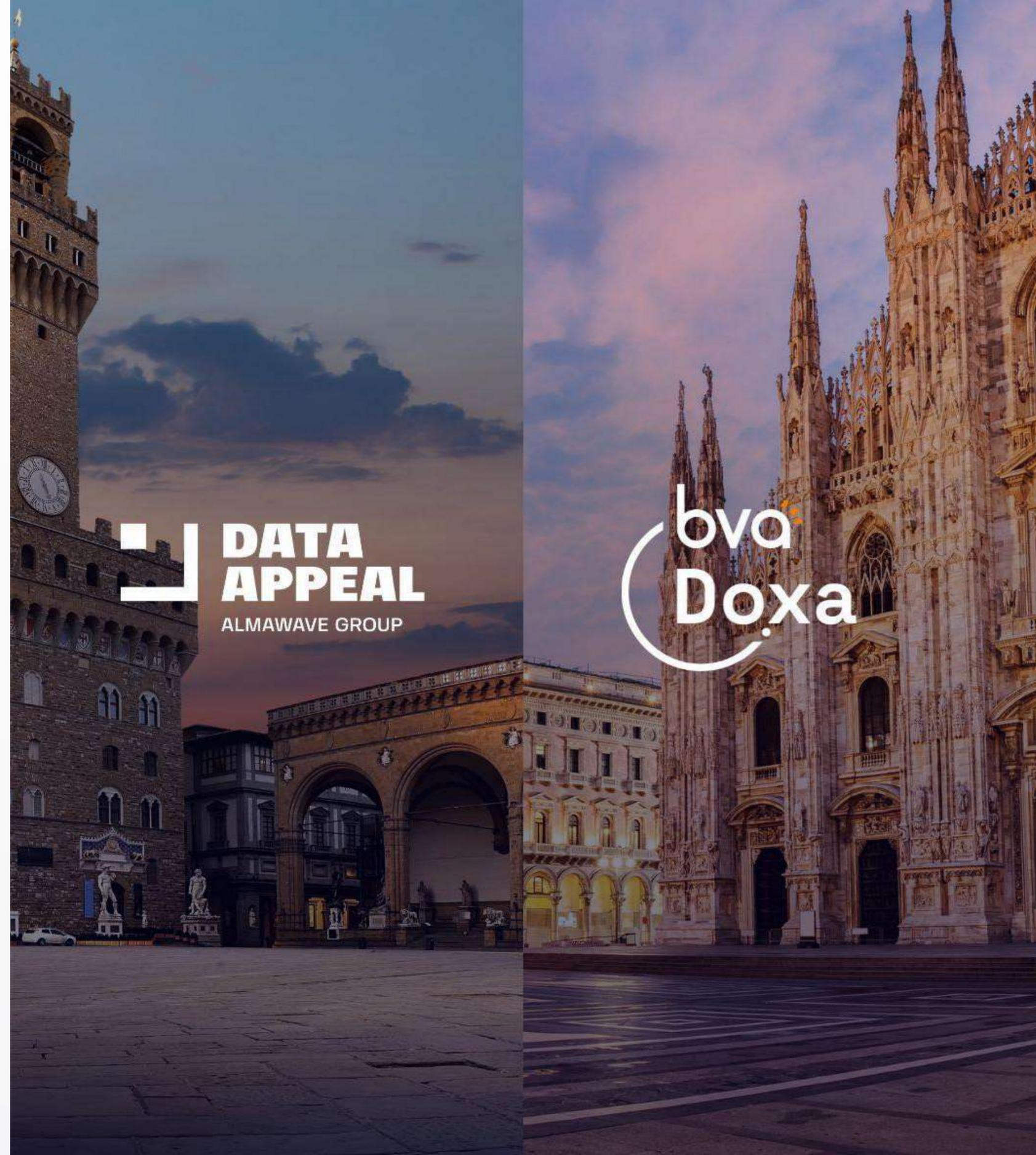
Seasonality
18,4 /100

▲ **+5,6** Compared to previous year

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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.

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Italy Digital Destination Awards

2024 Edition

Trends: 2023 - 2024

Seasonality

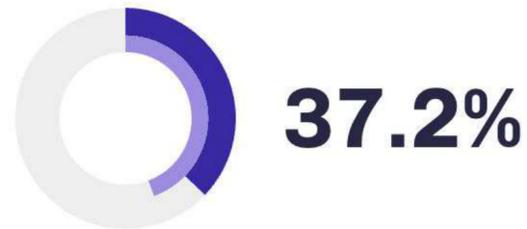Set 2022 - Ago 2023   Set 2023- Ago 2024

Content volume over time
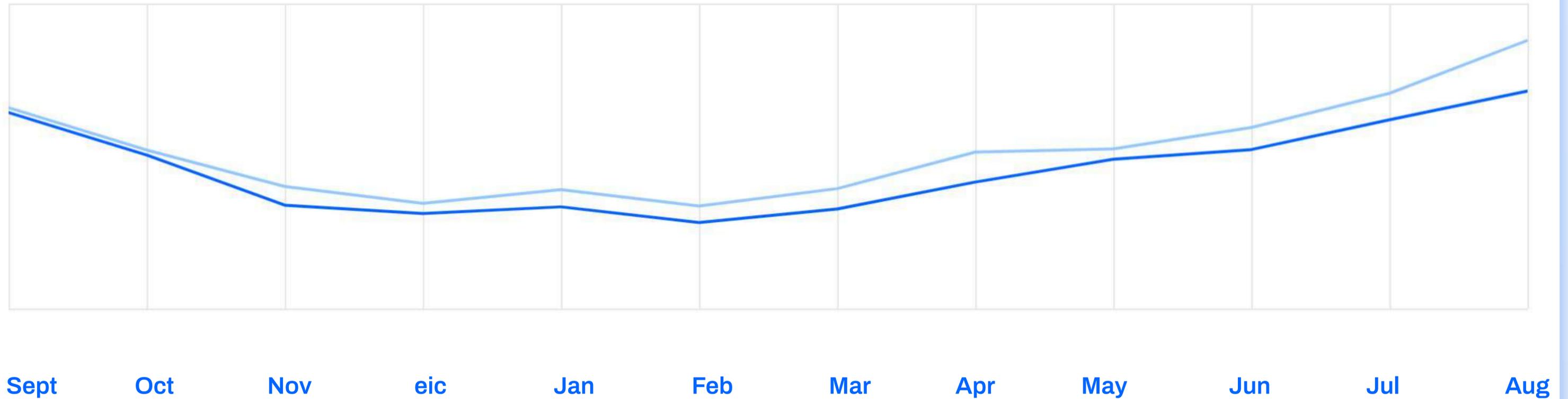
| Sept | Oct | Nov | eic | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug |

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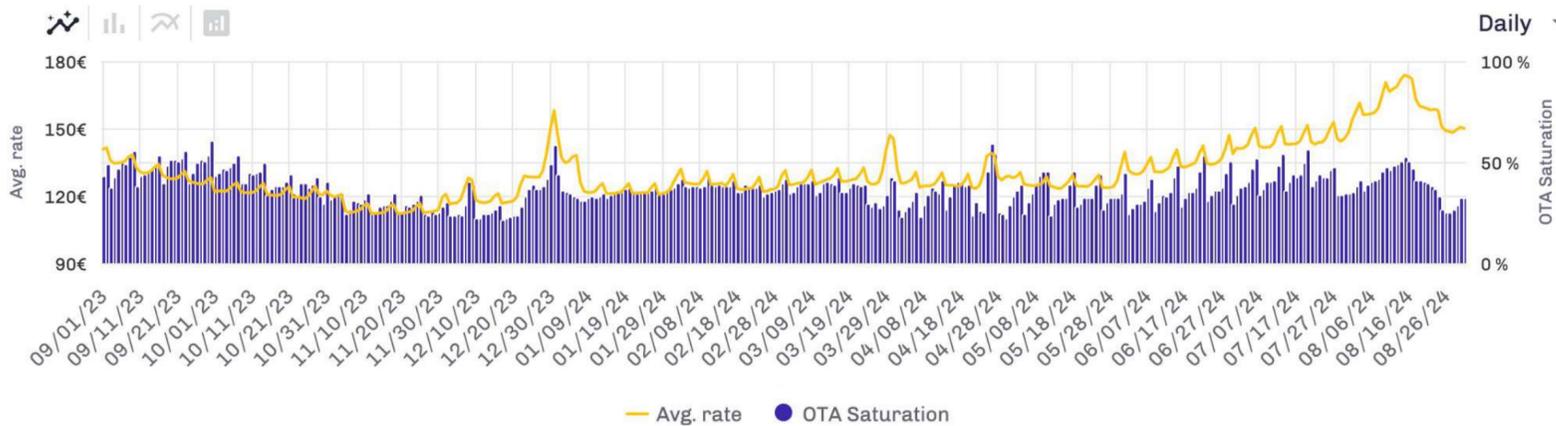
Average accommodation rates and sentiment
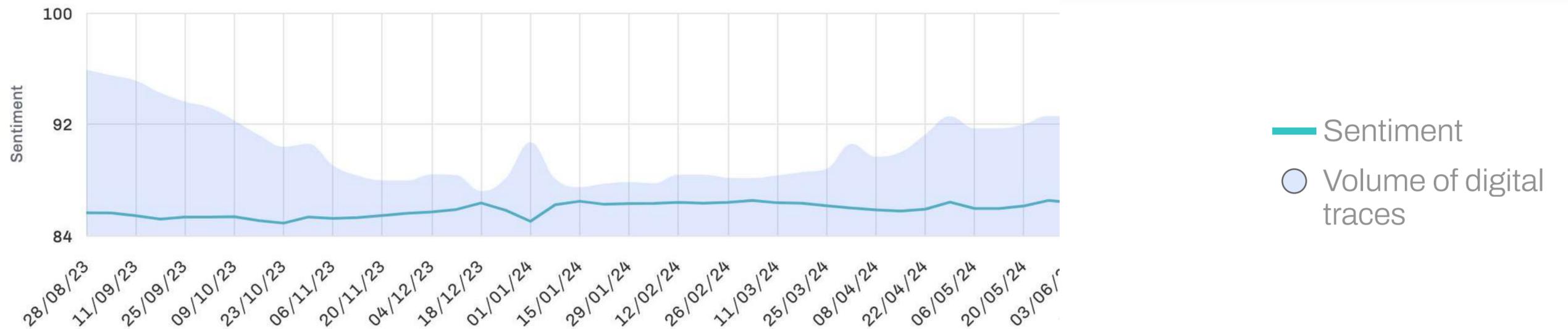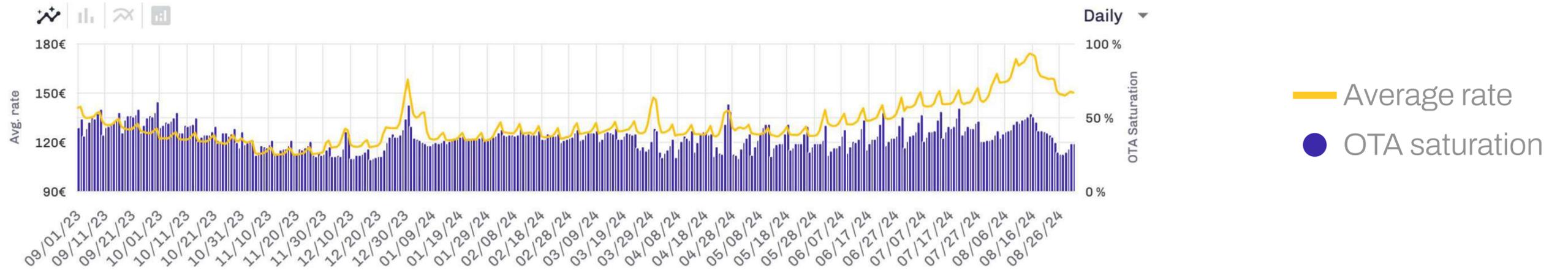
#IDD2024

Sept 2023- Aug 2024
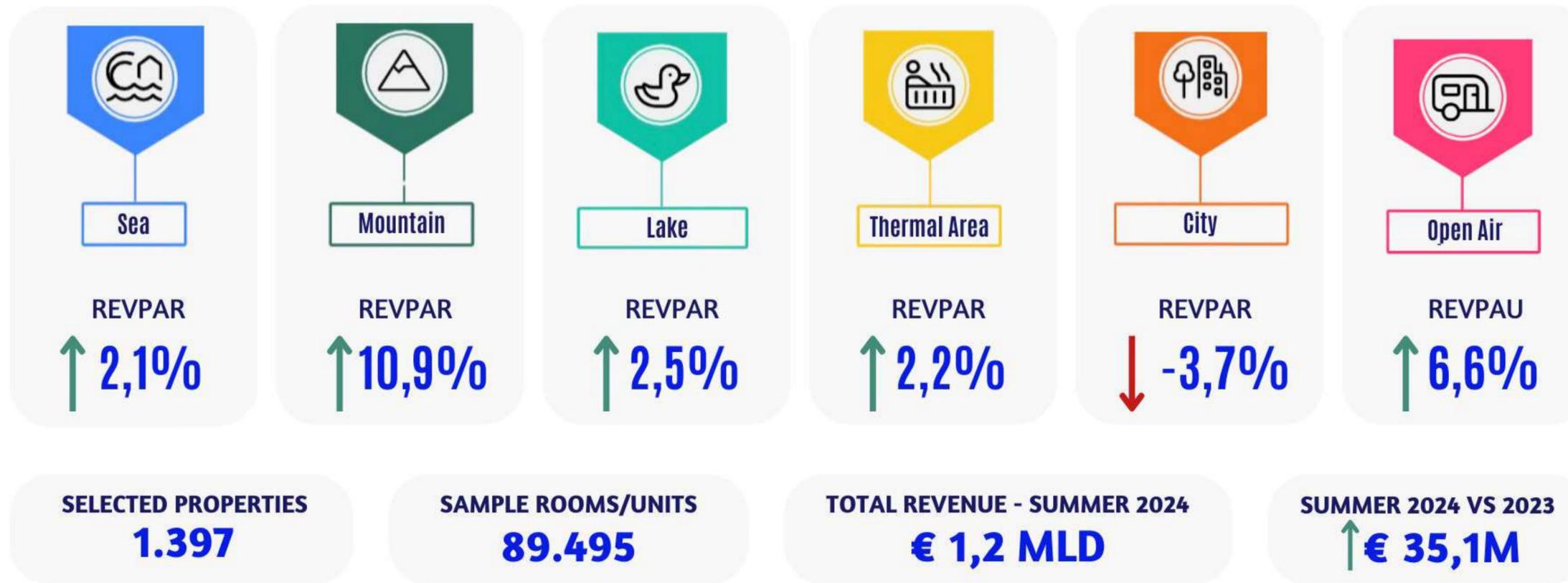
Visitor origin by country

SEPT 2023- AUG 2024

84/100
FOREIGN VISITOR SENTIMENT

58.2%
%TOTAL FOREIGN VISITORS

+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

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

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%

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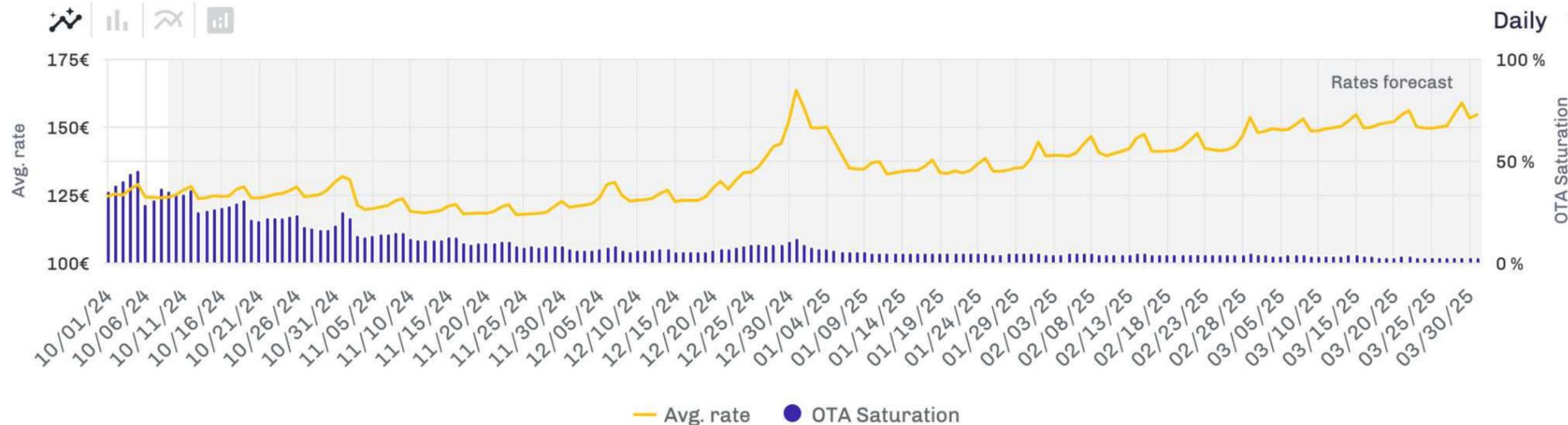
Incoming passengers over the next six months

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%

Monthly ▾

Non consolidated data

Passengers

1 200k

600k

0

10/01/24　11/01/24　12/01/24　01/01/25　02/01/25　03/01/25　04/01/25

● Next 12 months　● Previous year, same period

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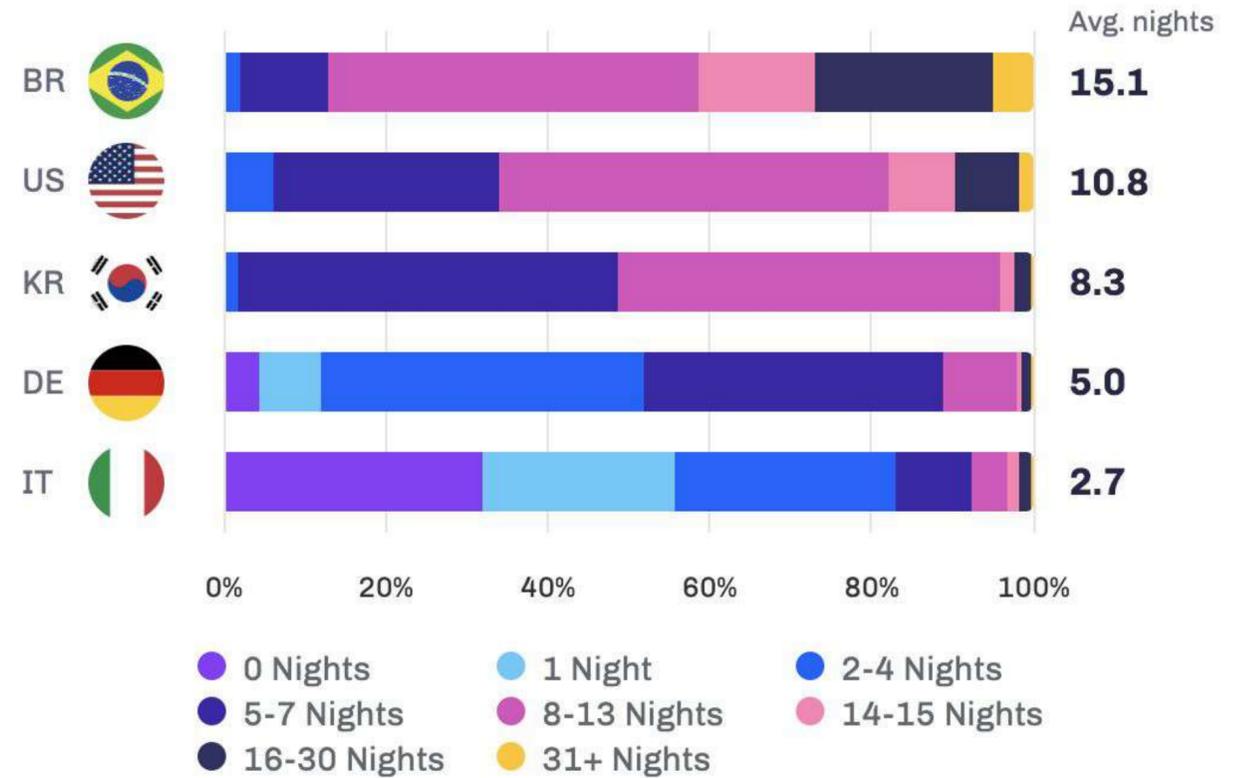
What attractions do visitors appreciate the most in Italy?

Top 10 Italian attractions based on content volume

SEPT 2023- AUG 2024

MILAN

PISA

ROME

4° Milan Cathedral

CONTENT	17.5 K
SENTIMENT	95

1° Trevi Fountain

CONTENT	31.6 K
SENTIMENT	93.4

2° Colosseum

CONTENT	23.3 K
SENTIMENT	94.1

3° Leaning Tower of Pisa

CONTENT	17.7 K
SENTIMENT	94.1

5° Pantheon

CONTENT	15.5 K
SENTIMENT	93.6

			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

#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

1°
Sfizio.Ristorante & Pizzeria
96
SENTIMENT

3°
L'Antica Pizzeria da Michele
94
SENTIMENT

ROME

BARI

NAPLES

2°
Mariuccia
94,2
SENTIMENT

4°
Ristorante Pizzeria Forum Roma - Forno a legna
92
SENTIMENT

5°
Gino e Toto Sorbillo
85
SENTIMENT

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Italy Digital Destination Awards

2024 Edition

Hospitality
analysis

Sept 2023 - Aug 2024

ID ITALIA DESTINAZIONE DIGITALE THE **DATA APPEAL** COMPANY ALMAWAVE AlmavivA

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

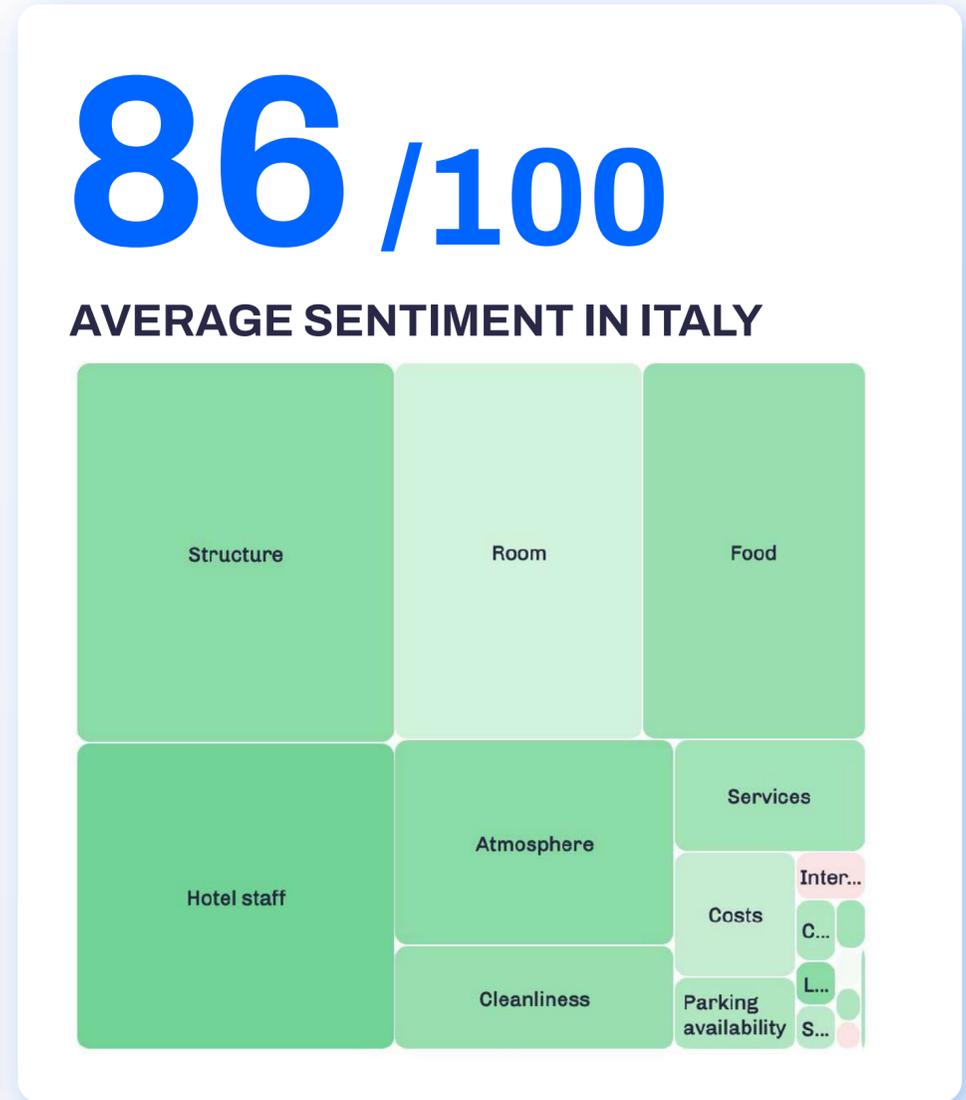**87.4** /100
GUEST SENTIMENT:
Hospitality

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

ID ITALIA DESTINAZIONE DIGITALE

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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

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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
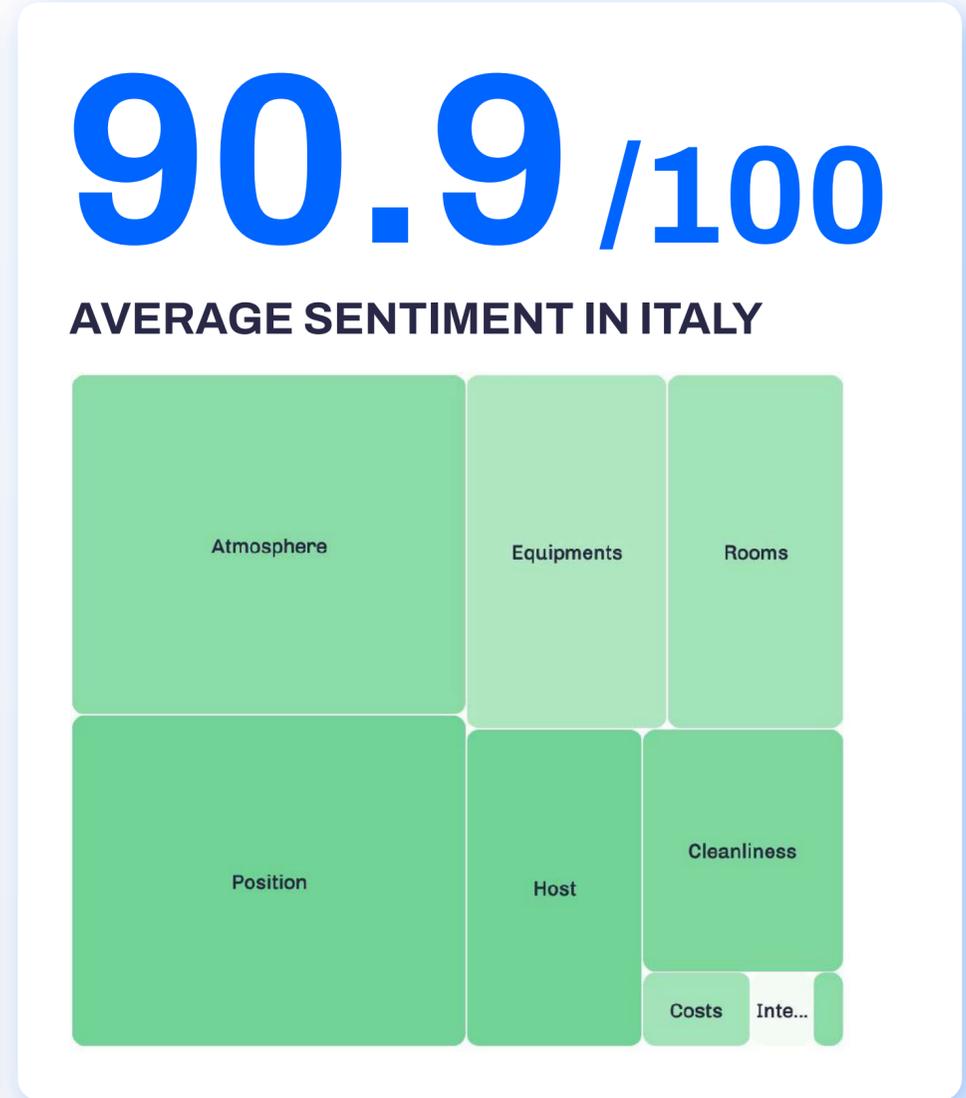GUEST SENTIMENT: **Short-term rentals**

SOUTHERN ITALY
+0,4 points

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

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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

Atmosphere | Equipments | Rooms
Position | Host | Cleanliness
Costs | Inte...

Italy Digital Destination Awards

2024 Edition

Food and Beverage analysis

Sept 2023 - Aug 2024

ITALIA DESTINAZIONE DIGITALE

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Digital presence

344K

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
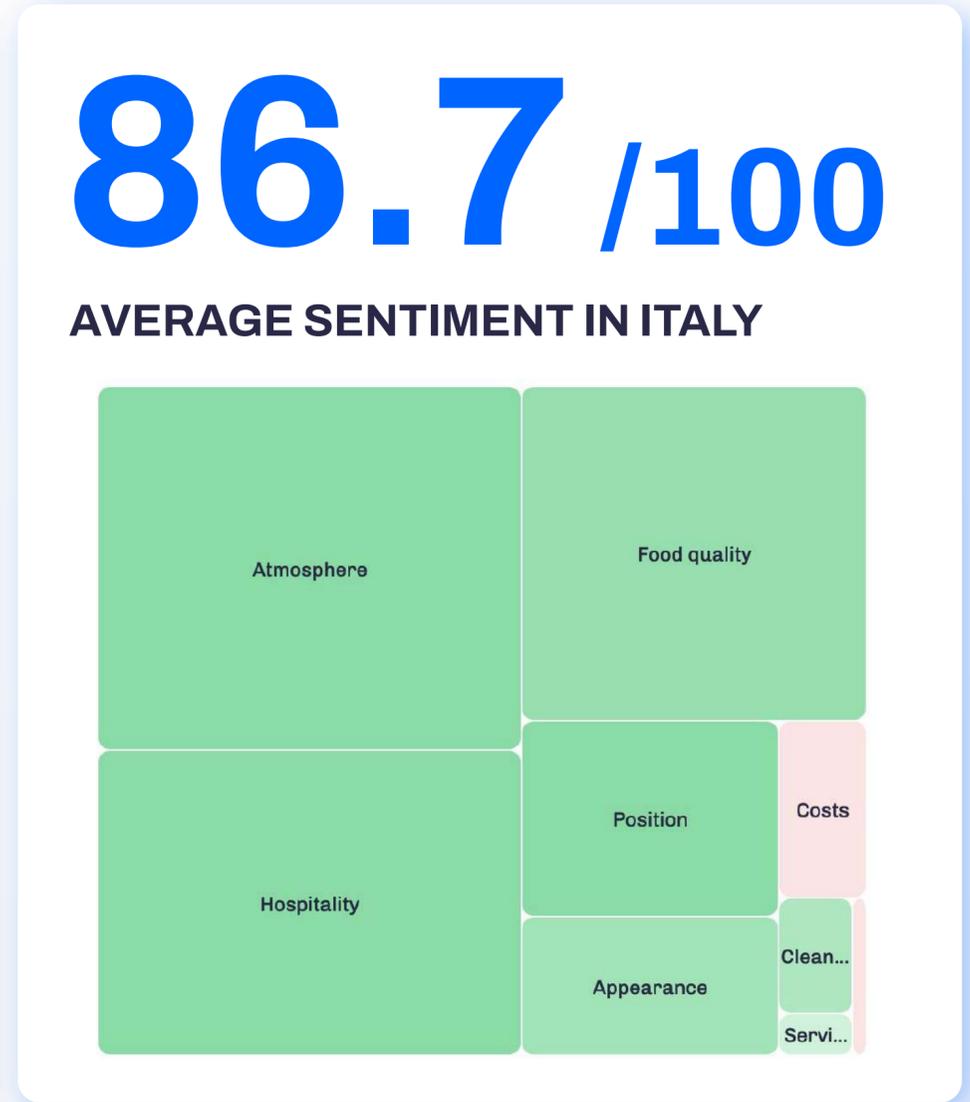
Italy Digital Destination Awards

2024 Edition

Attractions analysis

Sept 2023 - Aug 2024

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.

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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
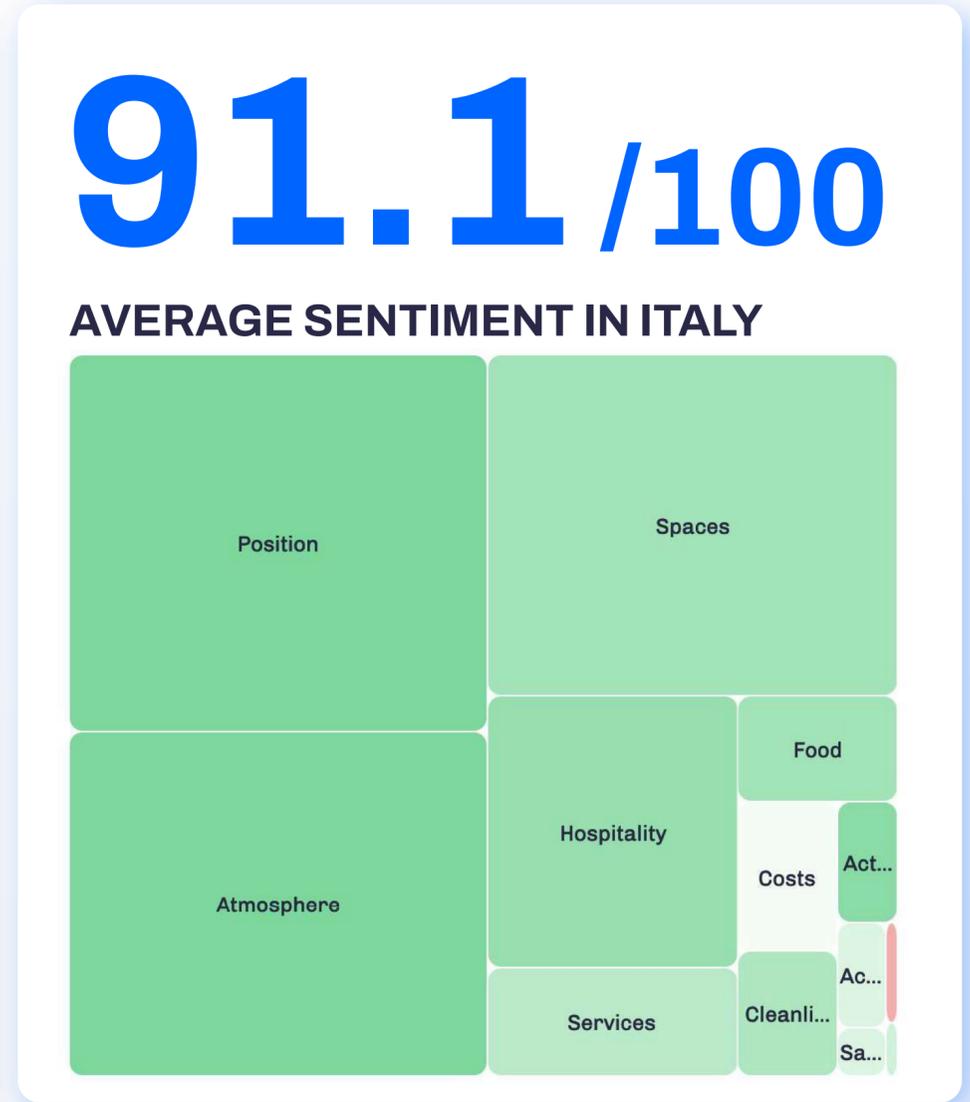+0,2 points

92.0 /100
VISITOR SENTIMENT:
Attractions

SOUTHERN ITALY
+0,2 points

90.2 /100
VISITOR SENTIMENT:
Attractions

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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

Position · Spaces · Atmosphere · Hospitality · Services · Food · Costs · Act... · Cleanli... · Ac... · Sa...

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.

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Methodology

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

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Awards

2024 EDITION

Cashless Destination Award

Destination with the most extensive use of electronic payments

AlmavivA Touring Club Italiano BW | Best Western Hotels & Resorts HBenchmark Hospitality Data Intelligence sandersandbeach VISA Maggioli ALMAWAVE GROUP bva Doxa

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

TRENTINO

Destination with the highest average score on the
Sustainability Index

Inclusivity
Index
Award

LOMBARDY

Destination with the highest average score on the
Inclusivity Index

European Destination Most Appreciated by Italian Visitors

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

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).

MAIELLA NATIONAL PARK ABRUZZO

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| 1° MAIELLA NATIONAL PARK (ABRUZZO) | 2° PROSECCO HILLS (VENETO) | 3° LANGHE MONFERRATO ROERO (PIEDMONT) |

AlmavivA

Touring Club Italiano

BW | Best Western. Hotels & Resorts

HBenchmark Hospitality Data Intelligence

sandersandbeach

VISA

Maggioli

ALMAWAVE GROUP

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Destination with the Best Gastronomic Offer

RAGUSA, SICILY

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

Destination with the Best Reputation

Destination with the best ratio of satisfaction
to tourist popularity

VENETO

| 1° VENETO | 2° BASILICATA | 3° TRENTINO |

Cosa apprezzano i turisti in Italia?

Top 10 attrazioni italiane ordinate per volume di contenuti

SET 2022 - AGO 2023

ESEMPIO 2023

			CONTENUTI	SENTIMENT
6°	ARENA DI VERONA	Verona	24.147	93,2 /100
7°	VATICAN MUSEUMS	Roma	23.258	91,8 /100
8°	PONTE DI RIALTO	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

4° Duomo di Milano

CONTENUTI 26.8 mila
SENTIMENT 94.7

PISA

1° Colosseo

CONTENUTI 58.9 mila
SENTIMENT 94.4

ROMA

3° Pantheon

CONTENUTI 32.2 mila
SENTIMENT 95.1

2° Torre di Pisa

CONTENUTI 36.4 mila
SENTIMENT 93.9

5° Piazza Navona

CONTENUTI 24.6 mila
SENTIMENT 95.1

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