

Data

All of the data analyzed refers to the Easter period over the past years. 2020 and 2021 are excluded due to the pandemic.

EASTER 2019:

18-25 April

EASTER 2022:

13-20 April

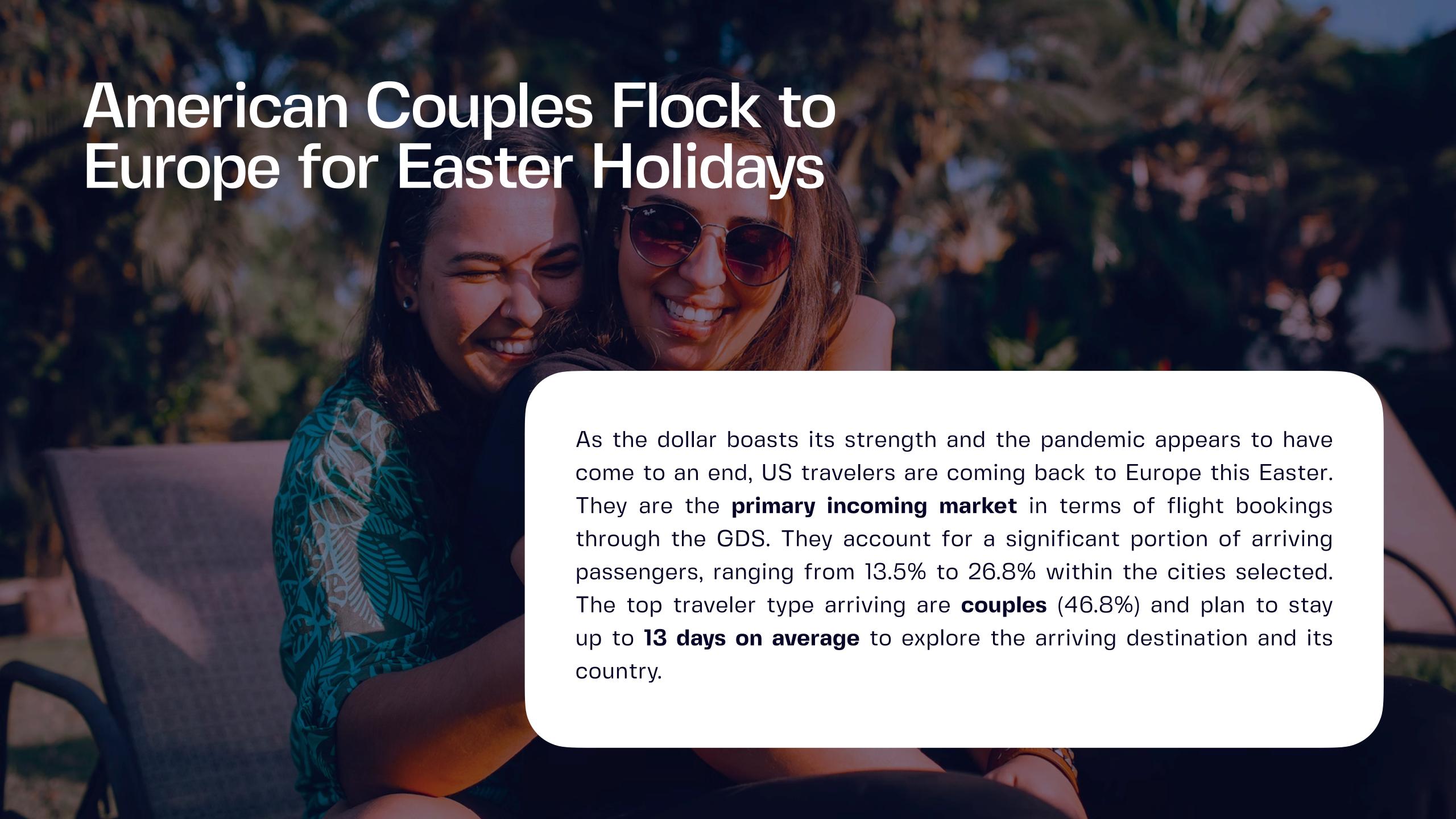
EASTER 2023:

5-12 April



CITIES ANALYZED:

Barcelona Berlin Paris Rome



Easter 2023: US Travelers in Barcelona, Berlin, Paris & Rome

Who do they travel with?



Couples **46.8%**



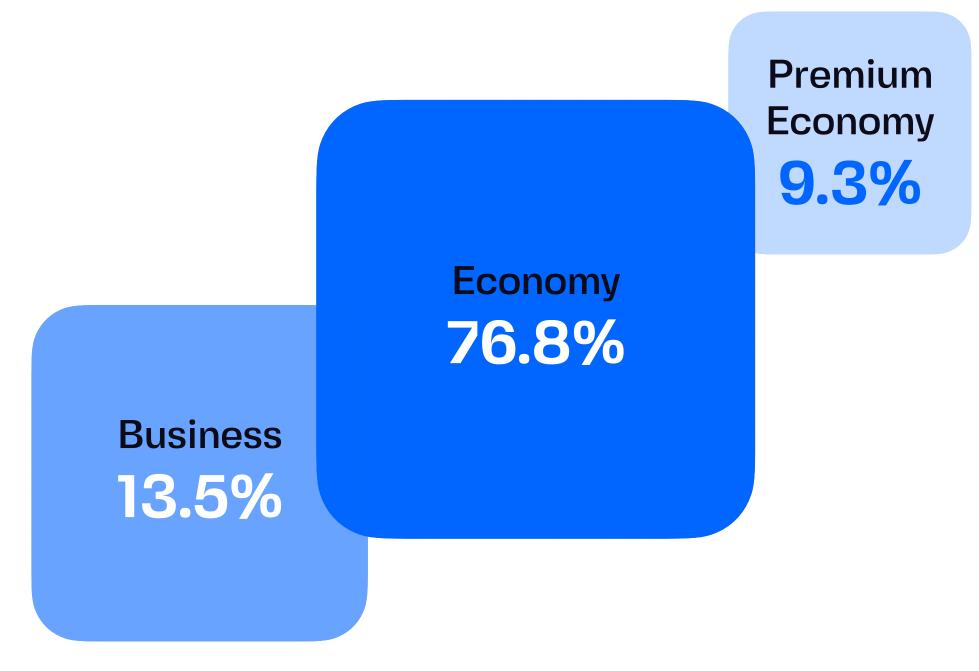
Solo 15.1%

3+ Family Members or Small Groups 15.1%



Easter 2023: US Travelers in Barcelona, Berlin, Paris & Rome

Which Cabin Class do they choose?



Top Airports: Which are the top airports for departure?

New York City	JFK
Newark	EWR
Los Angeles	LAX
San Francisco	SFO
Miami	MIA

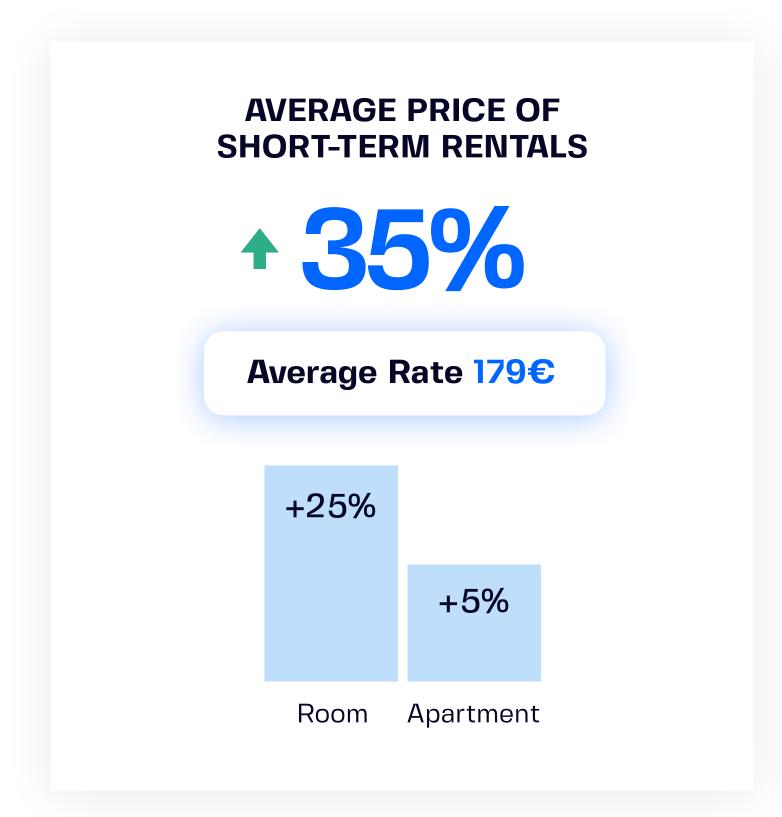






Short-term Rentals: Rates increase, yet remain affordable

In Barcelona, traditional hotel rates have seen a moderate increase of 10%: the lowest increase registered among the analysed cities. On the contrary, non-hotel offerings have seen a larger rate increase of 35%. However, Short-term rental accommodations such as apartments and rented rooms continue to be in high demand in Barcelona as the average price remains more affordable for the average tourist.







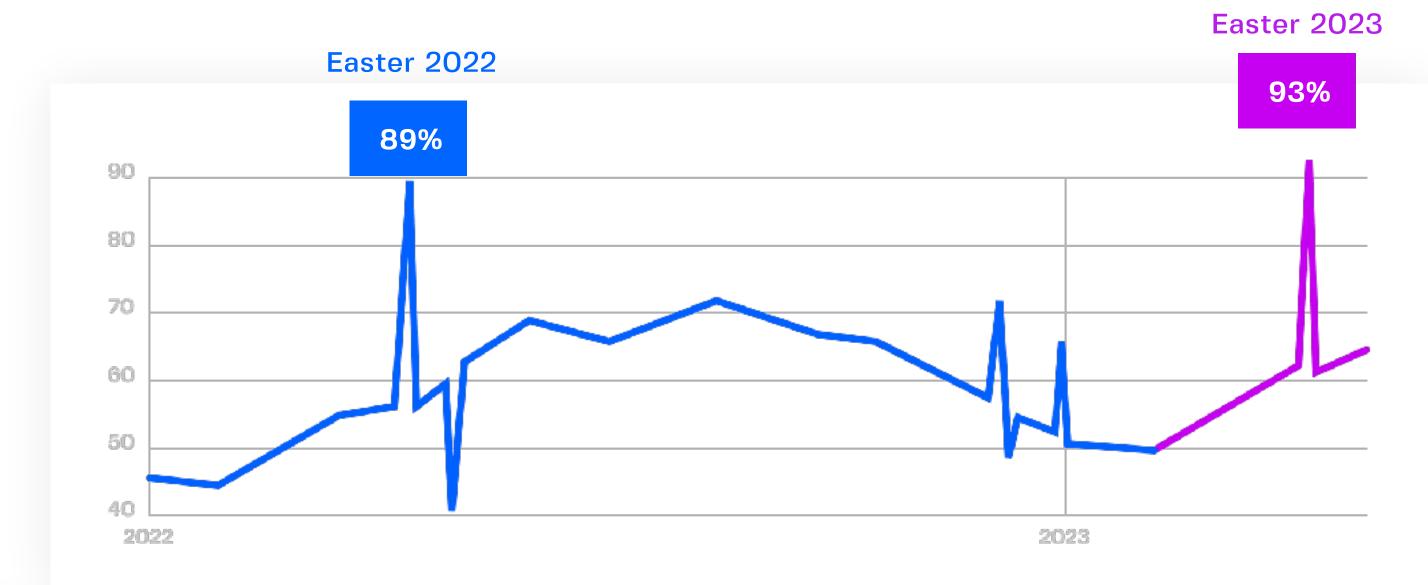


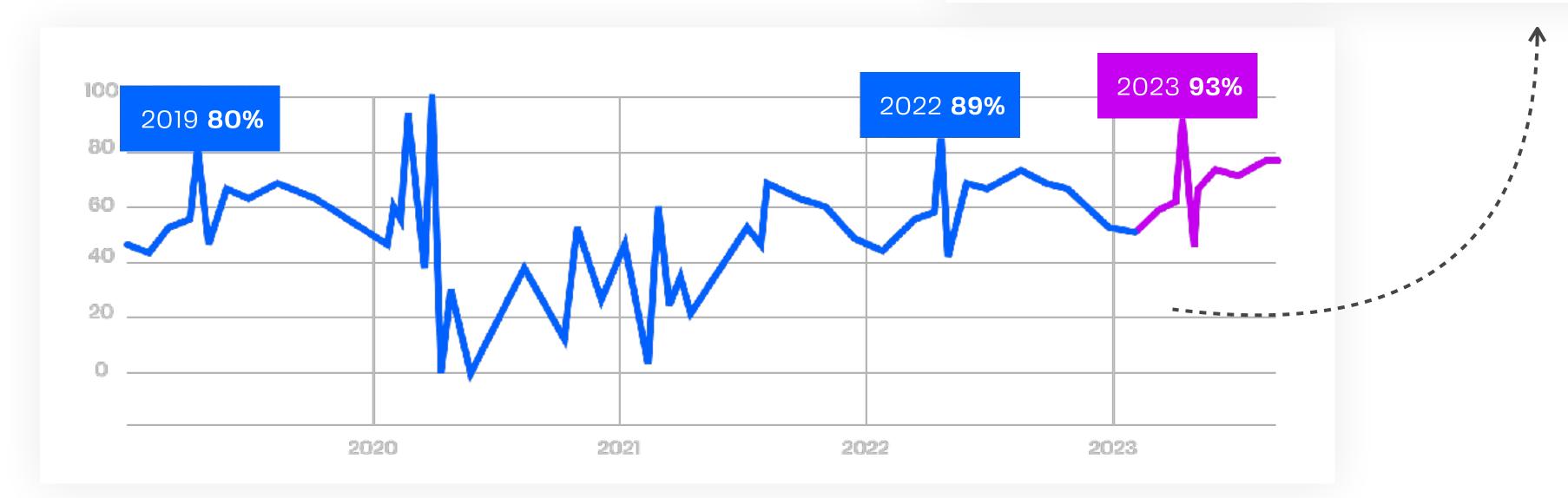
Accommodations Nearly Sold Out via OTAs for Easter 2023: Good Friday Night at 93% Occupancy

OTA
SATURATION
FORECAST

During Easter 2022, reservations made through Online Travel Agencies (OTAs) exceeded the levels seen in 2019, with an impressive 89% saturation (or occupancy) registered for Good Friday compared to 80% in the year prior. For Easter 2023, we expect a slightly higher occupancy rate than in 2022, estimated to be around 65% with a peak of 93% on Good Friday, surpassing the data from both 2019 and 2022. This situation can be considered "nearly sold out" for OTA accommodations.

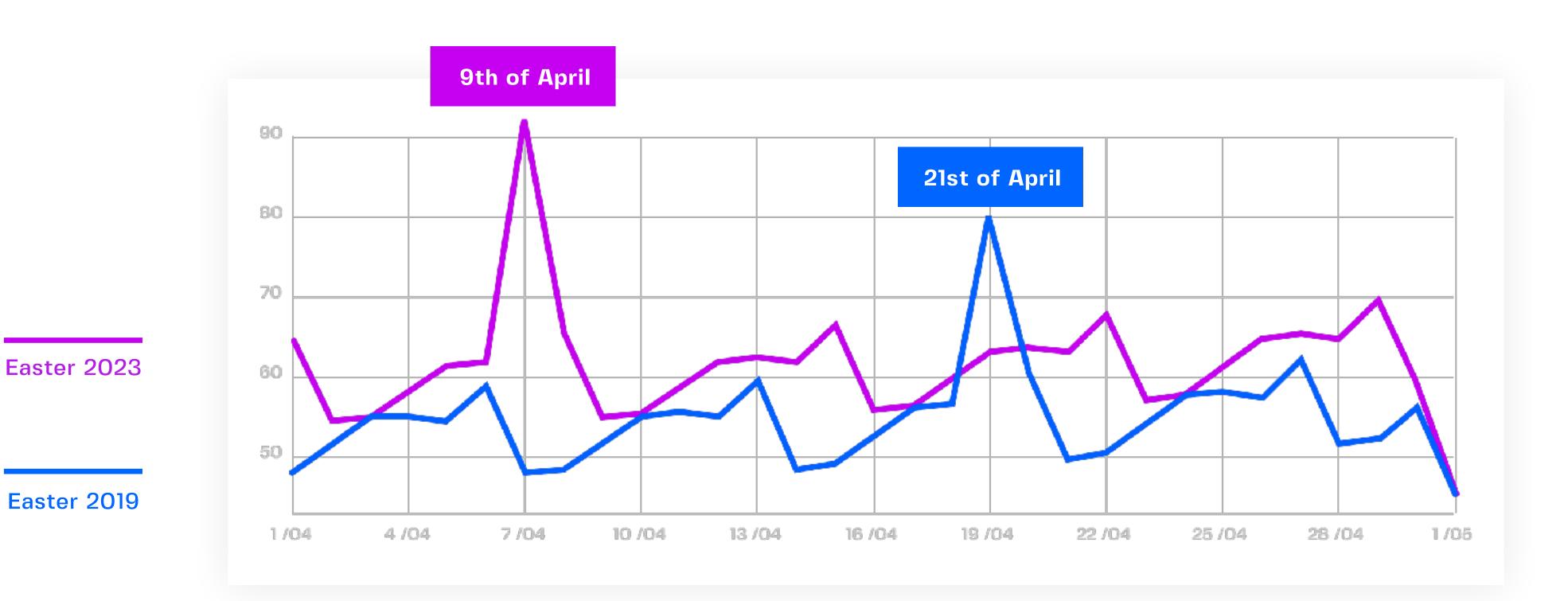
Easter Accommodation Bookings Surge Past Pre-Pandemic Levels







Accommodation Occupancy via OTAs: 2023 Easter Forecast





Flight Arrivals for Easter 2023: On track to reach pre-pandemic levels

GDS FLIGHTS FORECAST

According to the GDS bookings for airports in Barcelona during Easter week 2023, this year's festivities are shaping up to be promising. The number of US travelers has already surpassed last year's figures and is on track to reach pre-pandemic levels. In addition, there is a resurgence of non-European travelers from countries such as South Korea, Brazil, and Australia, whose numbers had declined consistently between 2020 and 2022. Argentinian passengers have increased significantly due to the post-Covid trend of visiting friends and relatives. European travelers, particularly from neighboring countries like Portugal and Italy, continue to be a strong market, and their numbers remain consistent compared to previous years.

Flight Arrivals Where do travelers fly from?

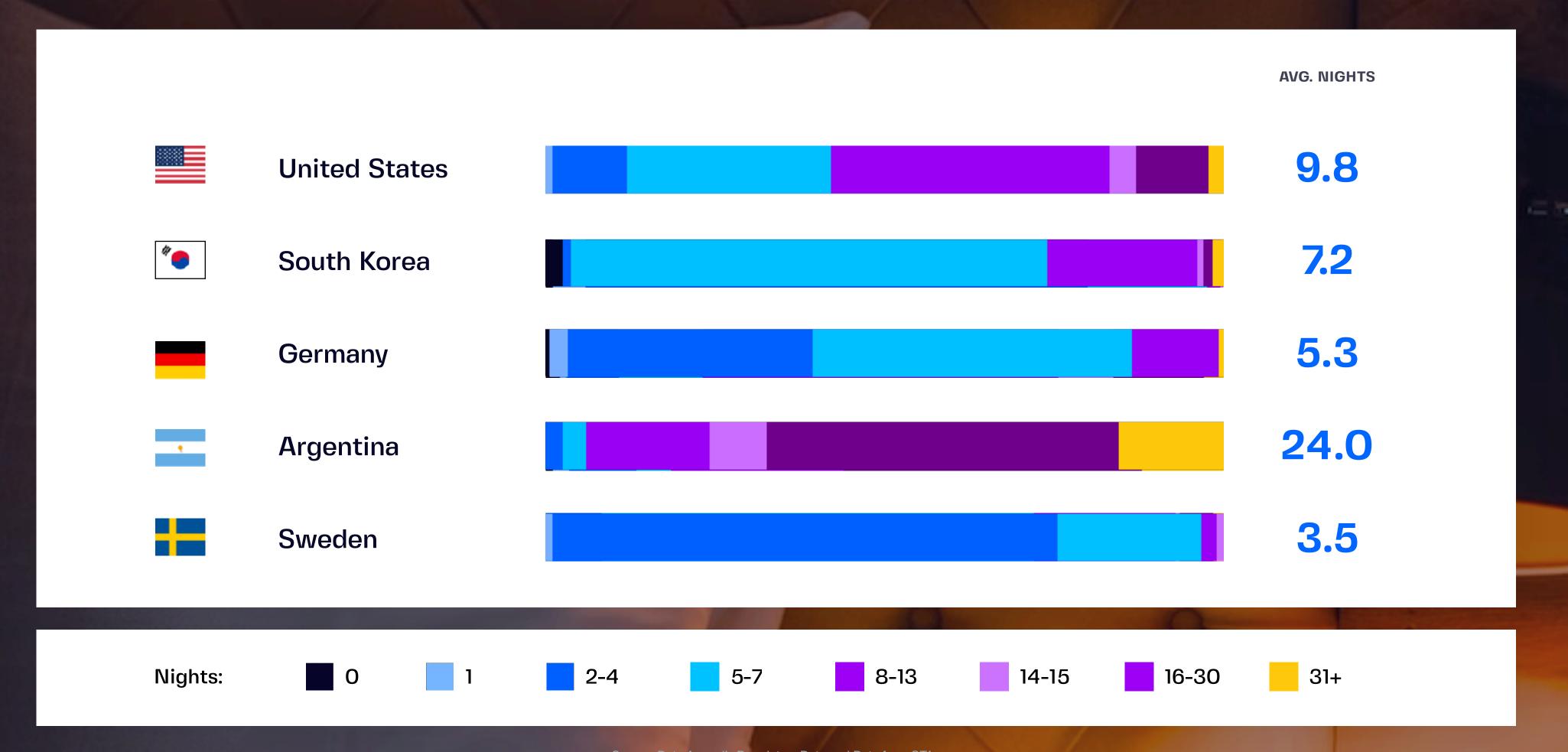


	PASSENGER DISTRIBUTION 2023	PASSENGER DISTRIBUTION 2022	PASSENGER DISTRIBUTION 2019	BOOKING WINDON DAYS
North America	25.5%	13.9%	12.7%	106
South America	11.6%	7.8%	6.1%	96
Europe	31.7%	48.4%	39.7%	90
Asia	8.2%	1.9%	4.6%	83,6
Middle East	3.4%	4.2%	4.7%	110
Oceania	4%	0.5%	1.6%	144
North Africa	1%	0.6%	1.1%	82





Length of Stay: On average, travelers mainly stay for 1 or 2 weeks in Barcelona



Top 10 Routes to Barcelona

Reference period:

5-12 April, 2023

Landing airports:

Barcelona Airports



	Seoul, South Korea	ICN
	New York City, US	JFK
•	Buenos Aires, Argentina	EZE
-	Stockholm, Sweden	ARN
•	Lisbon, Portugal	LIS
	Copenhagen, Denmark	СРН
	Frankfurt, Germany	FRA
**	Ben Gurion, Israel	TLV
	Rome, Italy	FCO
	San Francisco, US	SFO

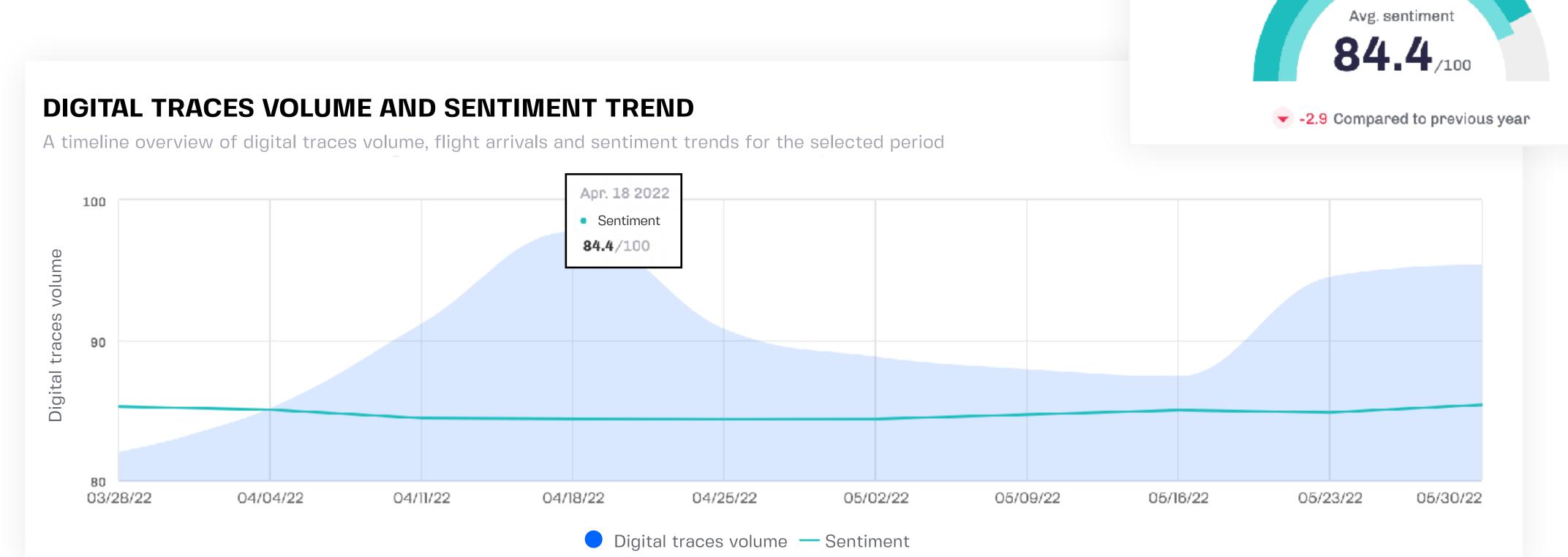


SENTIMENT

This score measures the level of user satisfaction from online content.

Rewind: Assessing Easter 2022

During Easter 2022, more than 80% of the visitors to Barcelona came from abroad, with the largest groups coming from France, Germany, Italy, and the UK. The most common types of travelers were families and couples, similar to Berlin. The most commented-on attractions in the city were Gaudi's masterpieces, which are symbols of Barcelona and Catalonia.





Easter 2022: Travelers in Barcelona

Who do they travel with?



Families

33.7%

	ere did they e from?	DISTRIBUTION
a de la companya de l	Spain	17.6%
	Germany	11.2%
	France	9.7%
	Italy	8.9%
	United Kingdom	8.0%



Easter 2022: Most appreciated attractions

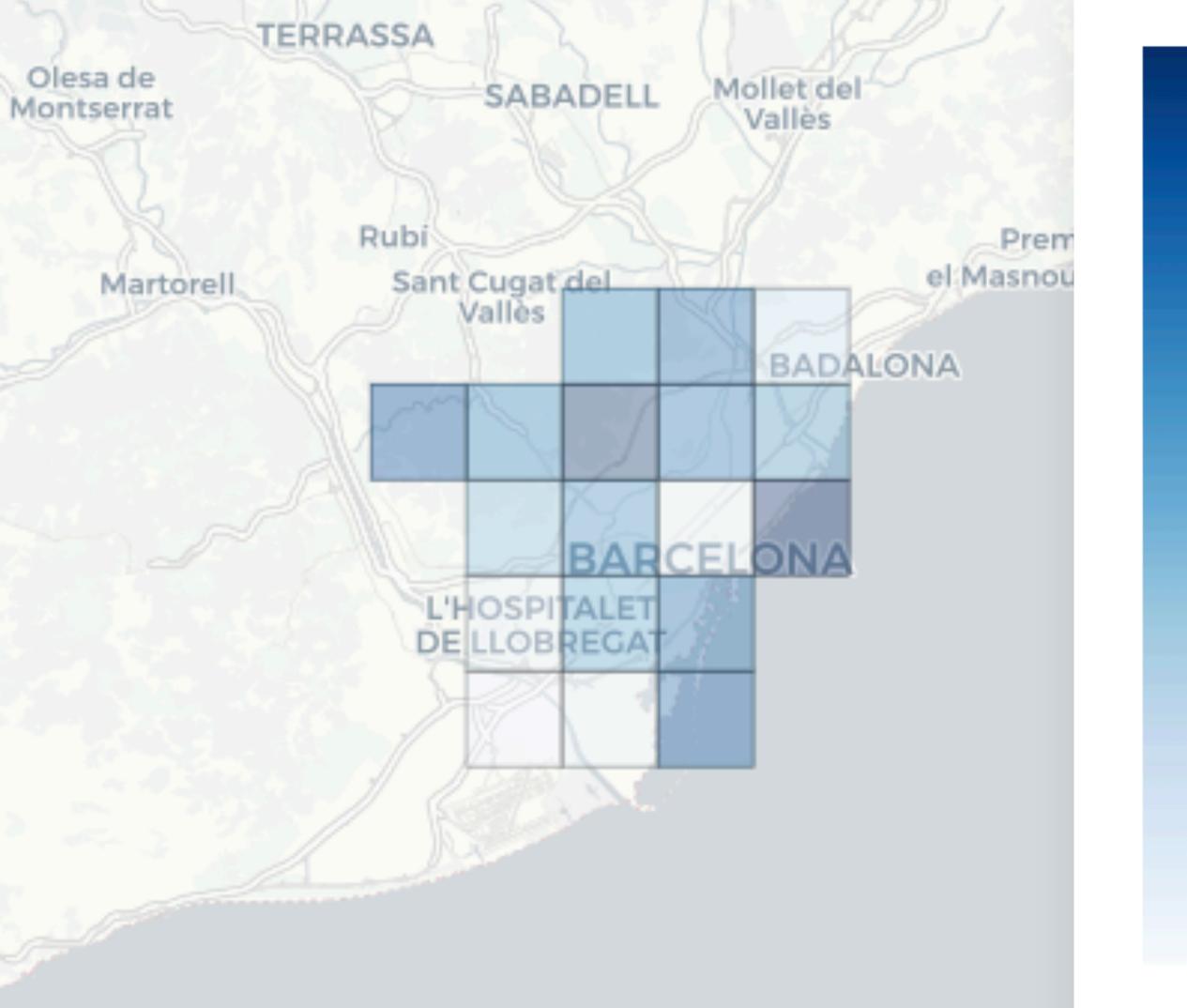
*sentiment score Park Güell Basilica de 83.7/100 Sagrada Familia 94.8/100 Casa Milà 89.7/100 Plaça de Catalunya 91.2/100 Casa Batlló 91.3/100

Destination Sustainability Index 62/100

70

68

56



The Destination Sustainability Index measures and combines fundamental aspects of tourism sustainability: governance and destination management, environment protection, the impact of tourist flows on the socio-economic scenario, and the level of socio-cultural well-being of the destination.





Popular for budget-conscious travelers in Easter 2023

Berlin is found to have the lowest average prices, with modest increases compared to 2022 (+18% avg). Hostels are in high demand in Berlin, especially among young travelers seeking affordable and stimulating accommodations. However, luxury hotels are also frequently booked, indicating a significant portion of tourists preferes a top-notch experience.

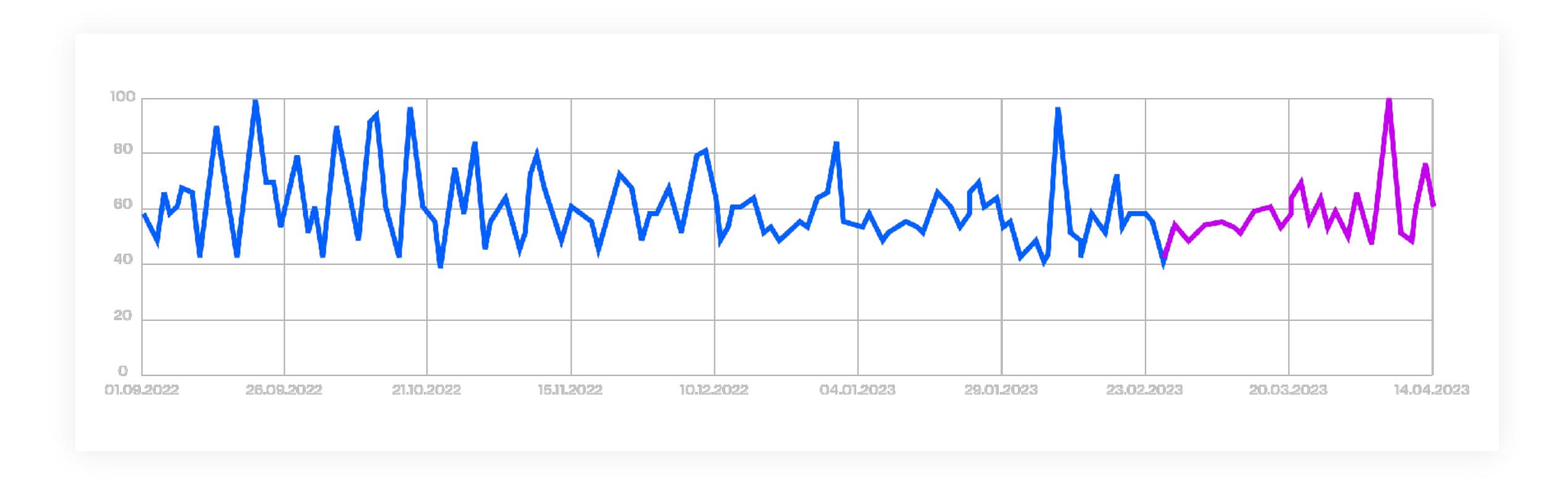




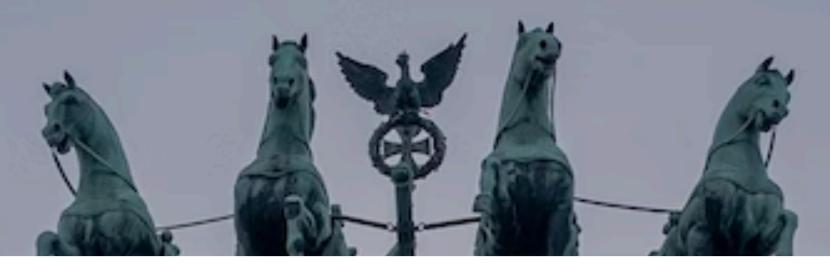


Easter OTA saturation close to sold-out

The saturation of bookings via OTAs reveals that hotels and other accommodations are nearly sold out over the 2023 Easter holidays



Berlin records the highest share of GDS flight bookings from the EU



GDS FLIGHTS FORECAST

According to flight data from GDS bookings during the week of Easter, Berlin is seeing a return of US tourism in line with European trends, although less strong. The numbers of US passengers exceed those of 2022 and 2019, yet are relatively consistent with pre-pandemic levels. 47% of the passenger distribution is from European countries. The average length of stay in Berlin is 2-7 nights, except for American tourists who tend to remain in the German capital for longer.

Flight Arrivals Where do travellers fly from?

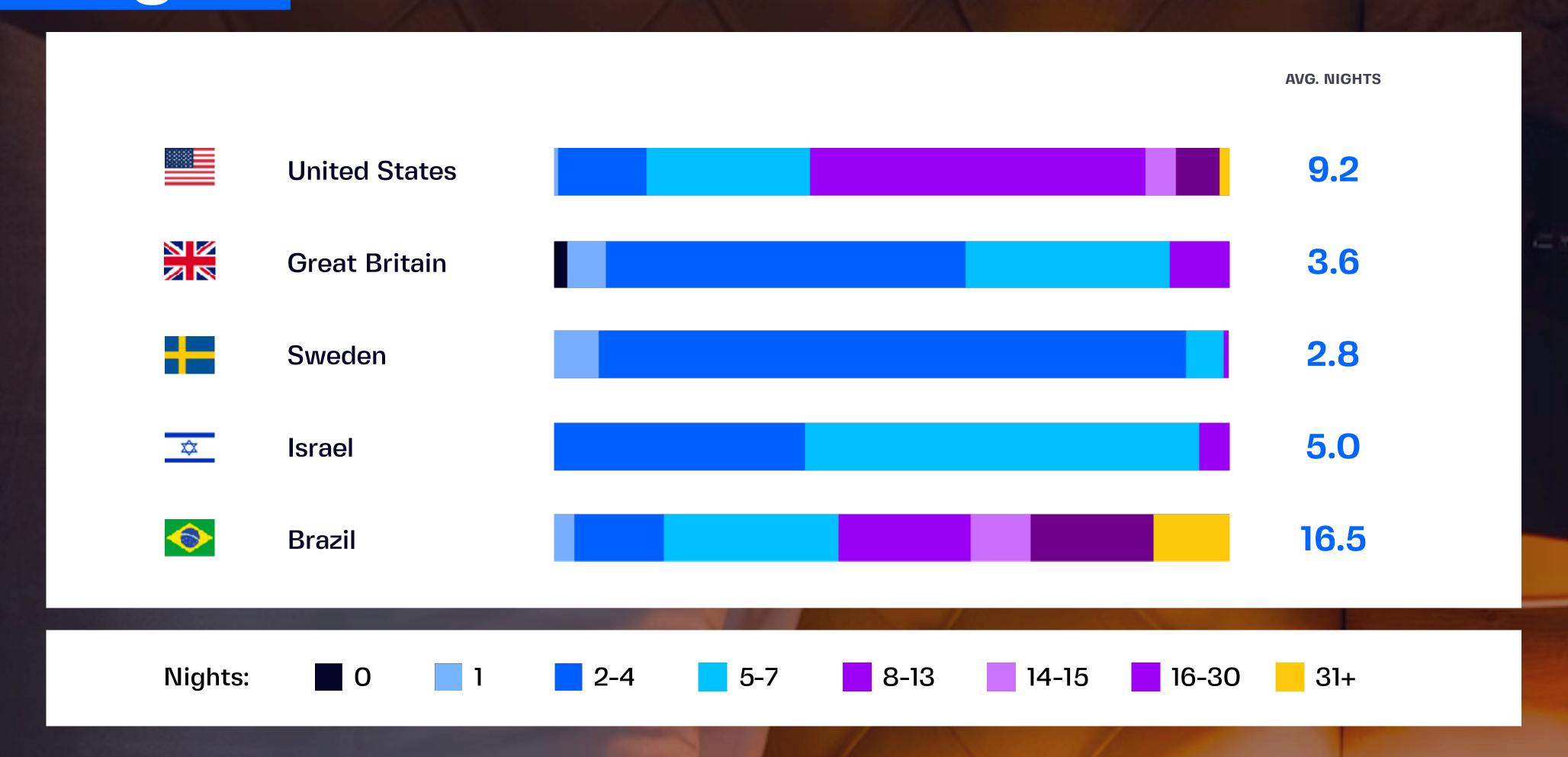


	PASSENGER DISTRIBUTION 2023	PASSENGER DISTRIBUTION 2022	PASSENGER DISTRIBUTION 2019	BOOKING WINDOW DAYS
North America	15%	10.1%	8.1%	99
South America	4.2%	1.9%	1.3%	117
Europe	47.4%	53.3%	58.9%	79
South East Asia	3.9%	1.6%	1.9%	64
Middle East	8.6%	10.5%	7.9%	73
Oceania	2.6%	0.4%	0.8%	149





The average length of stay in Berlin is 2-7 nights



Top 10 Routes to Berlin

Reference period:

5-12 April, 2023

Landing airports:

Berlin Airports



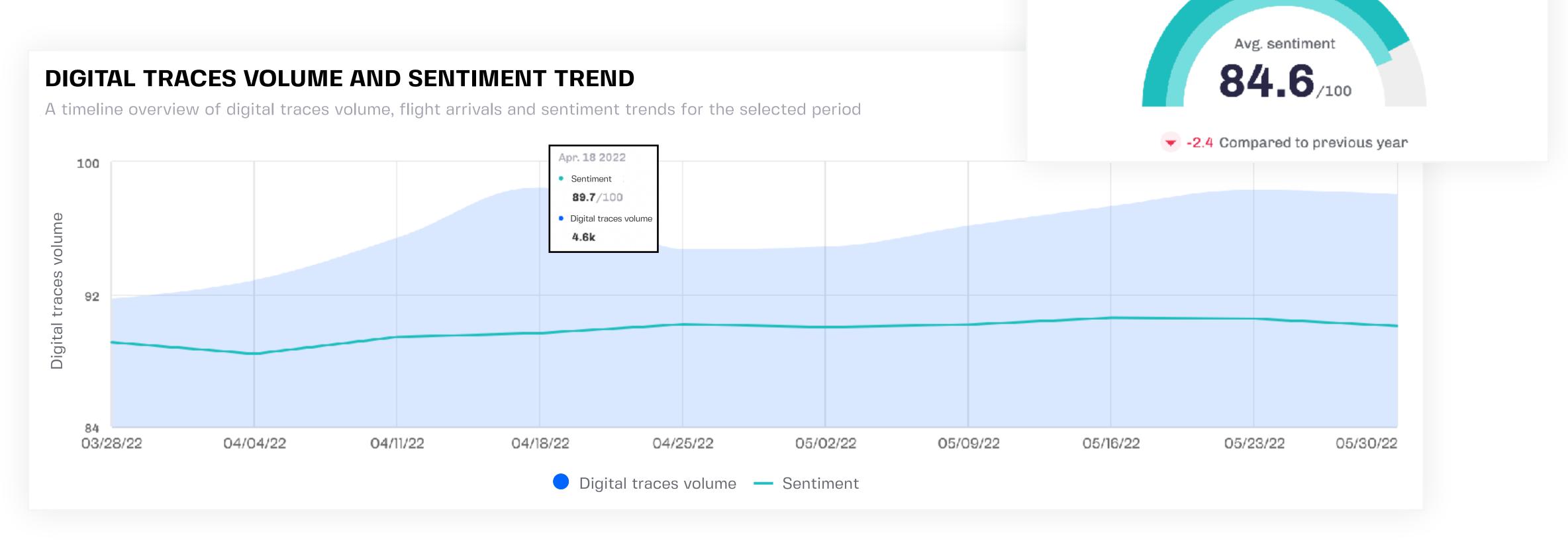
	Stockholm, Sweden	ARN
**	Ben Gurion, Israel	TLV
•	Lisbon, Portugal	LIS
	Oslo, Norway	OSL
	London, England	LHR
	Copenhagen, Denmark	СРН
	New York City, US	JFK
	Paris, France	CDG
	New York City, US	EWR
	Amsterdam, The Netherlands	AMS





Rewind: Assessing Easter 2022

The content volume graph highlights Easter week of 2022 as the start of the tourist season. 50% of visitors in Berlin came from Germany and the remaining 50% from countries such as Denmark, the UK, Spain, and Italy. The destination was popular among families and couples. Mauerpark and the East Side Gallery were amongst the most popular attractions during Easter week.

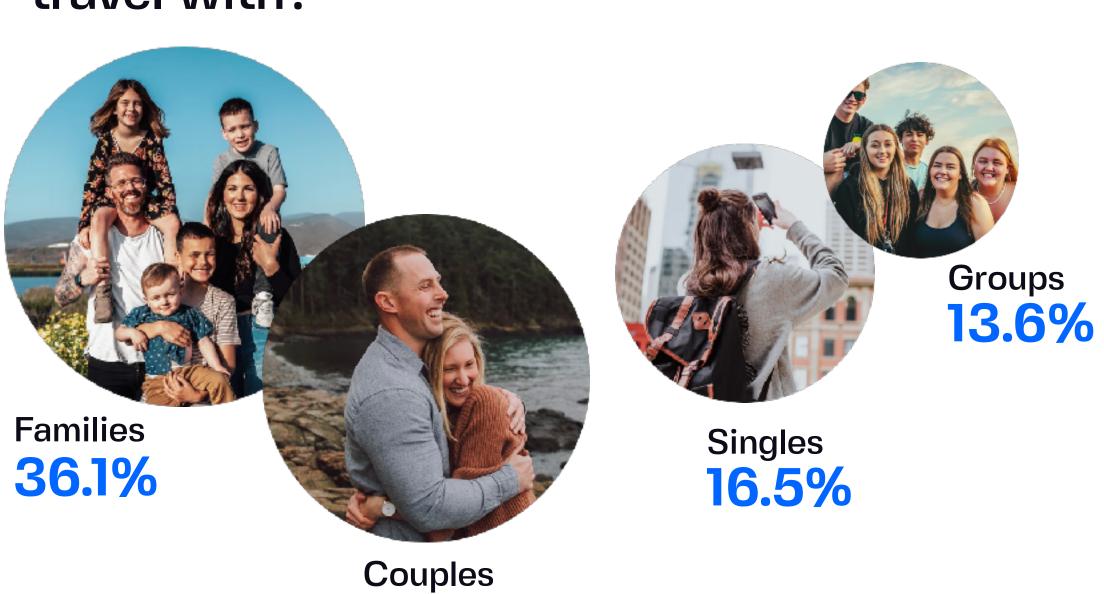


SENTIMENT

This score measures the level of user satisfaction from online content.

Easter 2022: Travelers in Berlin

Who do they travel with?



33.3%

Where did the come from?	y DISTRIBUTION
Germany	49.5%
Denmark	4.8%
United Kingo	dom 4.2%
Spain	4.0%
Italy	4.0%

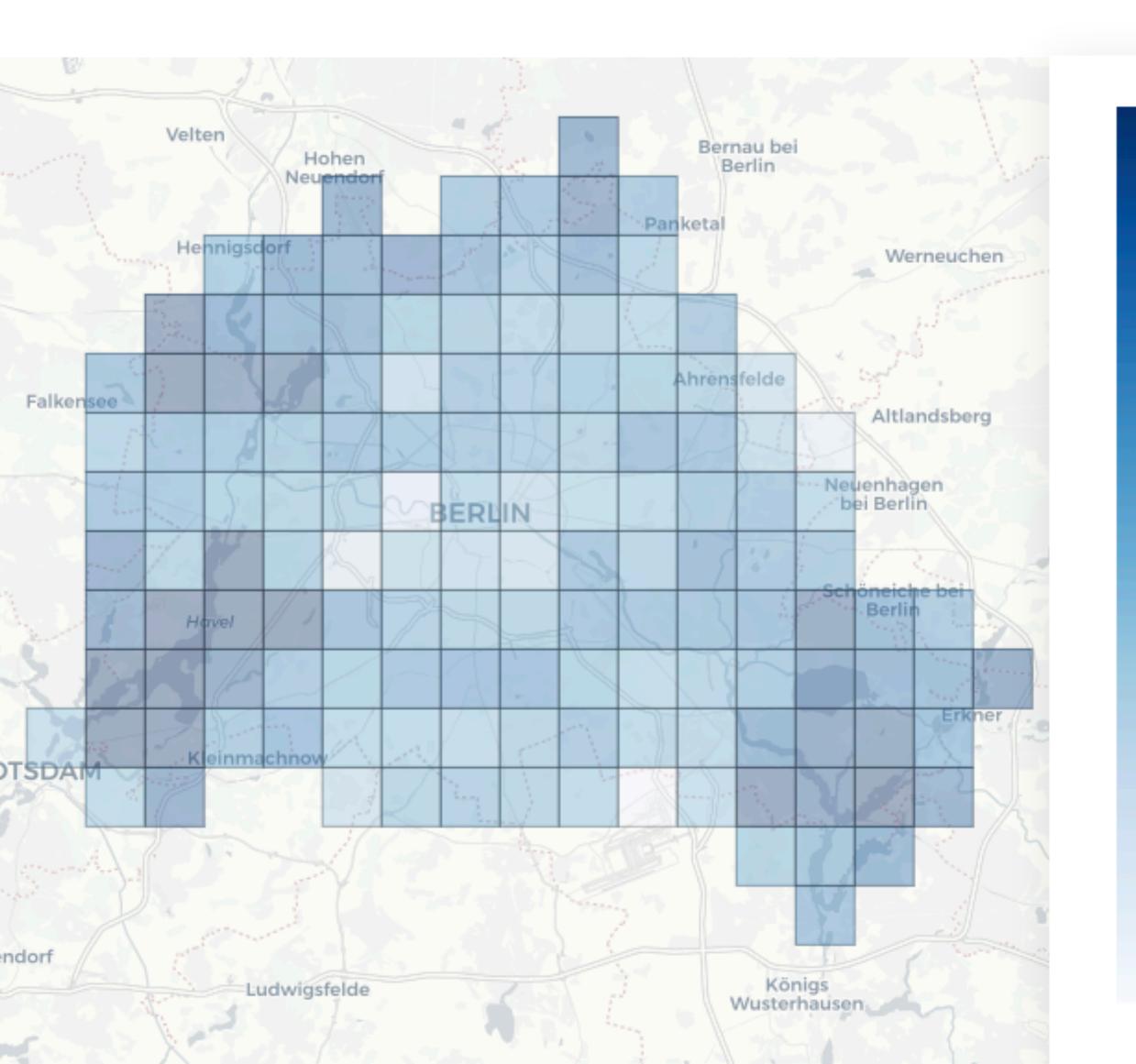


Most appreciated attractions

*sentiment score Mauerpark 91.7/100 **Postdamer Platz** 89.9/100 **German Museum** of Technology 87.4/100 'F MIR DIESE TÖDLICHE LIEBE ZU UMRULBUN Checkpoint Charlie 84.9/100

East Side Gallery 92.4/100

Destination Sustainability Index 58/100



The Destination Sustainability Index measures and combines fundamental aspects of tourism sustainability: governance and destination management, environment protection, the impact of tourist flows on the socio-economic scenario, and the level of socio-cultural well-being of the destination.





Paris accommodation rates increase between 4 and 14% ~

During Easter 2023, Paris will record the highest average rates for overnight stays among the cities analyzed, reaching €311. The average cost per night has increased by 15% compared to 2022, with Bed & Breakfasts undergoing the most significant change. However, they remain the most booked category in the sector due to their affordability.

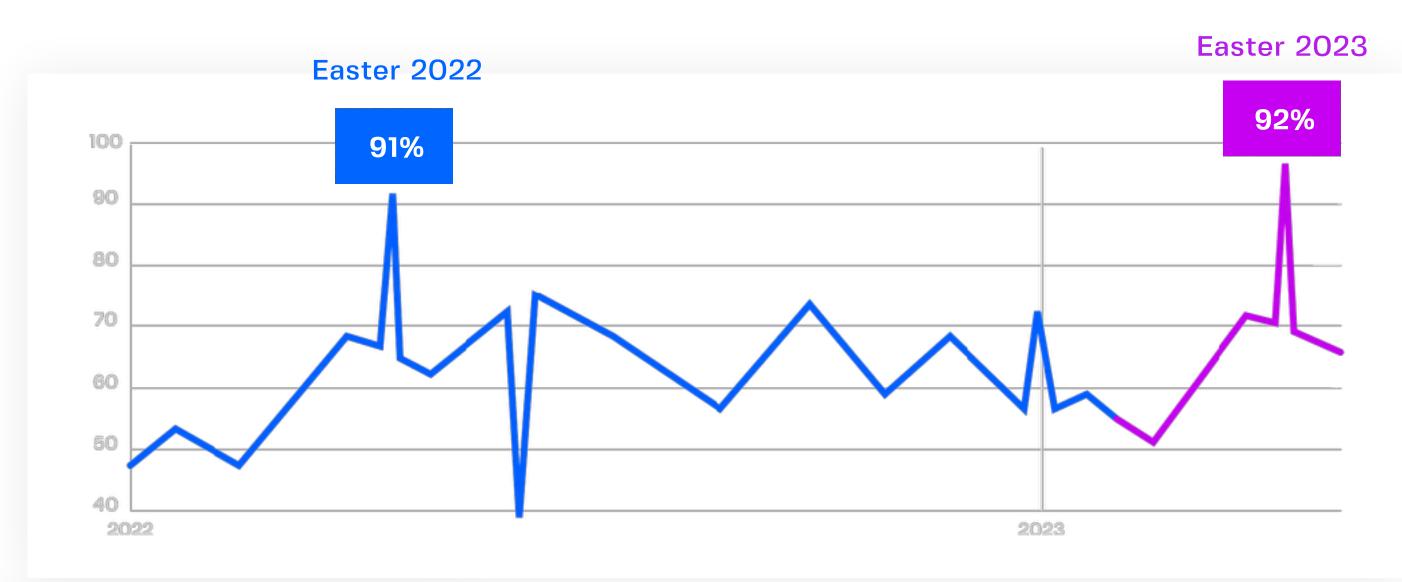


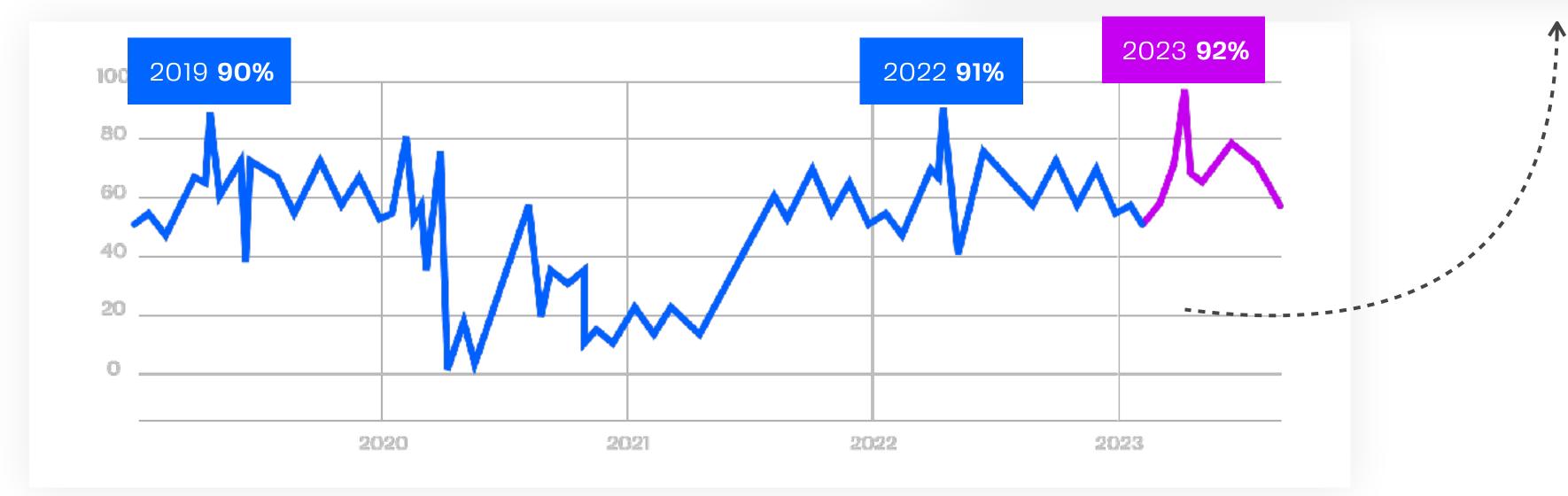






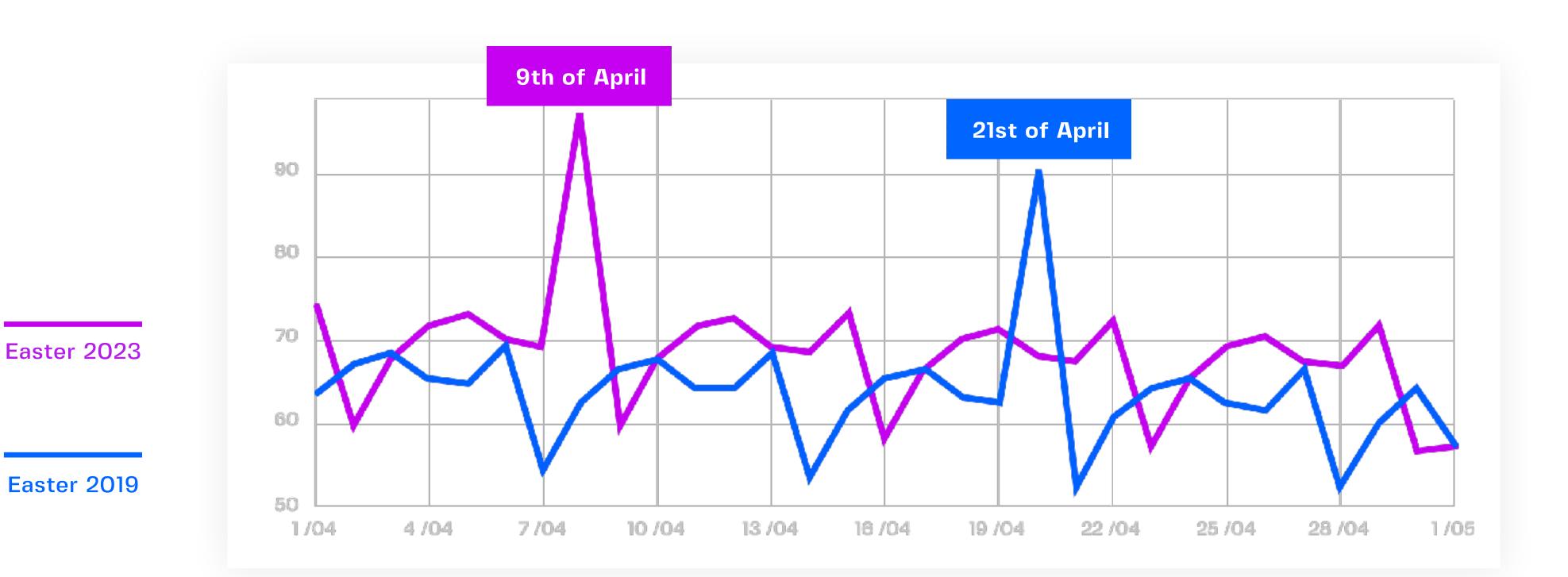
Easter Accommodation Bookings Surge Past Pre-Pandemic Levels







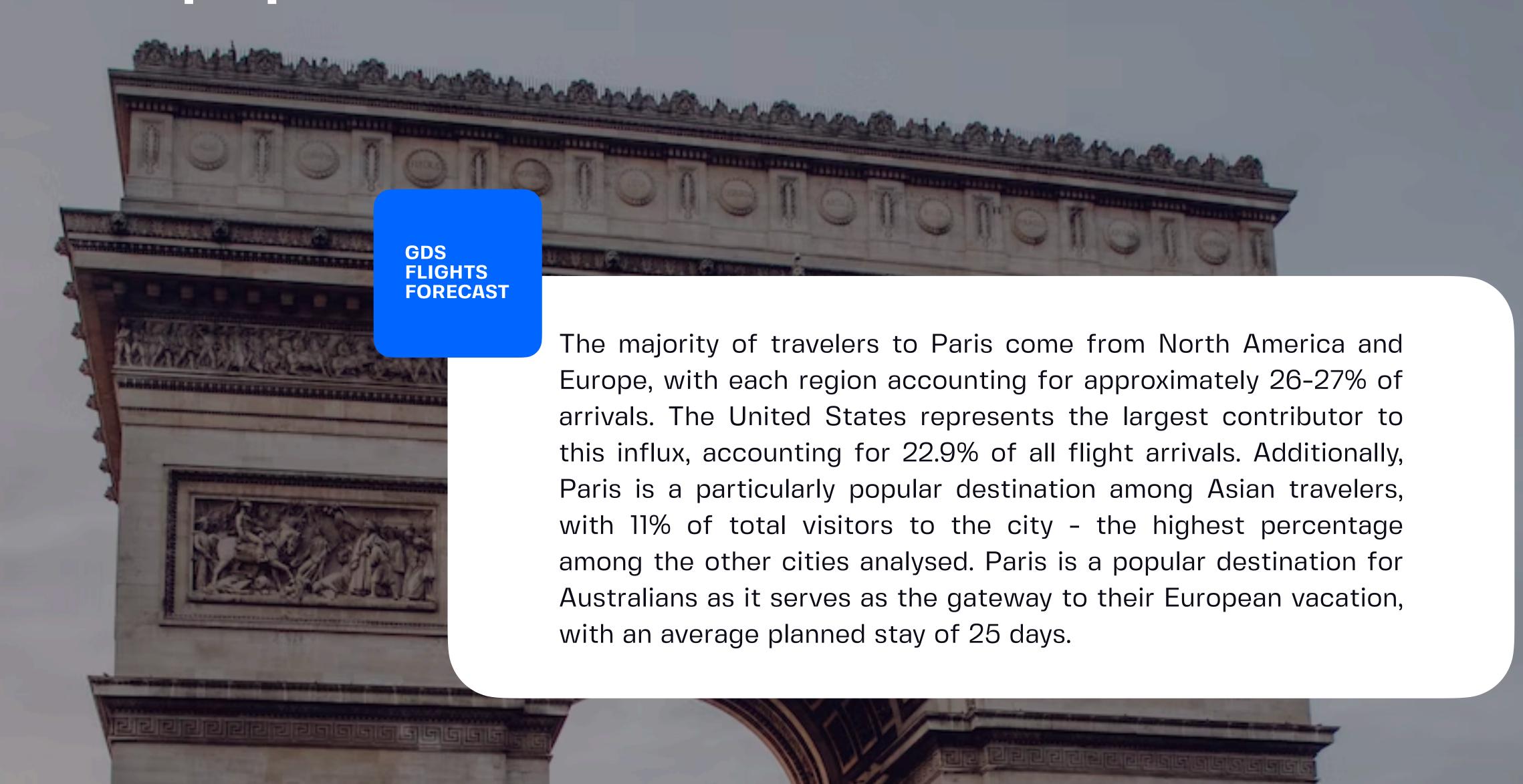
Accommodation Occupancy via OTAs: 2023 Easter Forecast







Paris popular for US and Asian travelers



Flight Arrivals Where do travelers fly from?

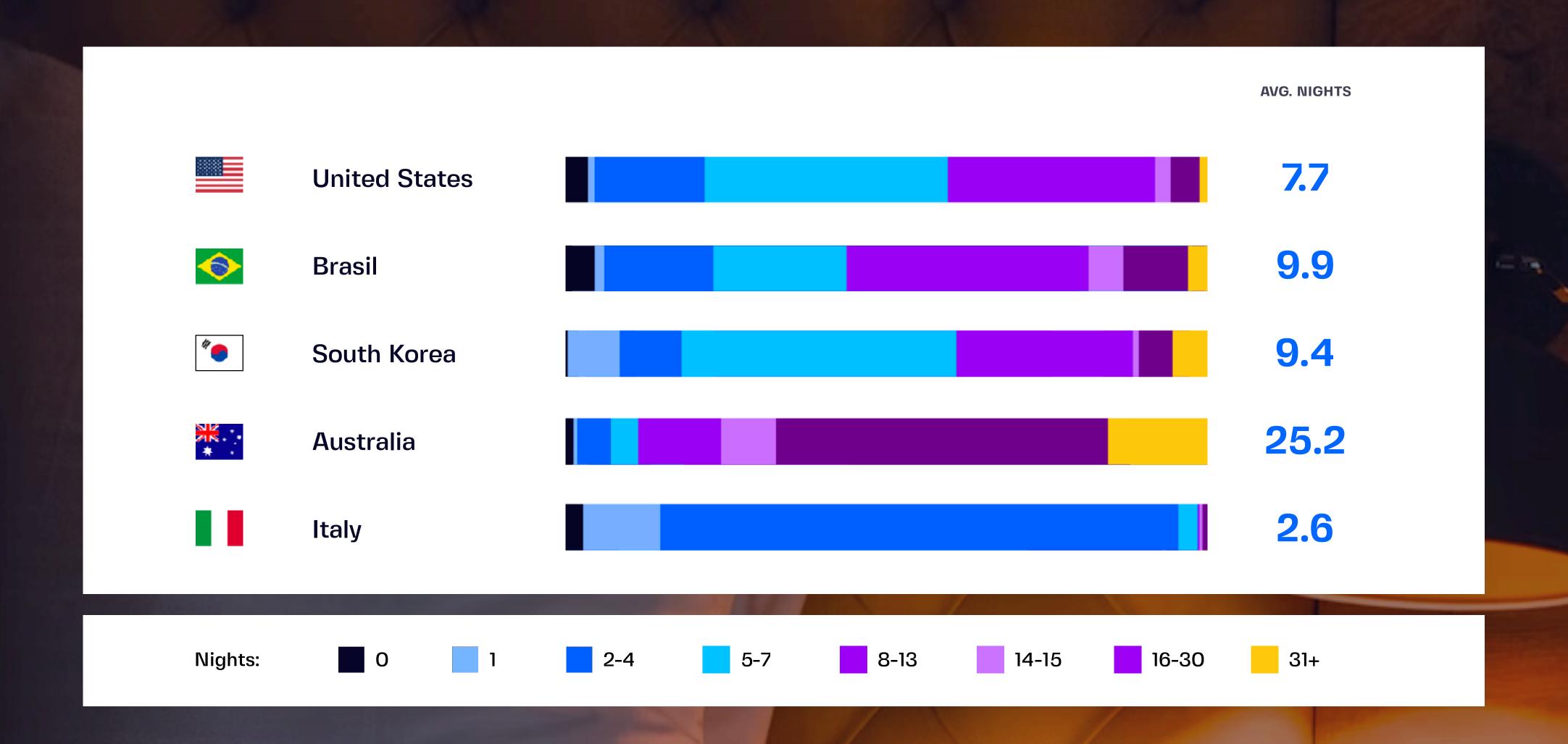


	PASSENGER DISTRIBUTION 2023	PASSENGER DISTRIBUTION 2022	PASSENGER DISTRIBUTION 2019	BOOKING WINDOW DAYS
North America	26.2%	15 %	12.1%	105,5
South America	7.4%	4.2%	3.3%	116,3
Europe	27.3%	40.5%	33.1%	84,3
Asia	11.6%	3.9%	6.6%	75,2
Middle East	4.2%	4.4%	5.5%	112
Oceania	3.5%	0.7%	2.3%	103
North Africa	1.1%	2%	3%	75





Most tourists in Paris stay over 7 nights



Top 10 Routes to Paris

Reference period:

5-12 April, 2023

Landing airports:

Paris Airports



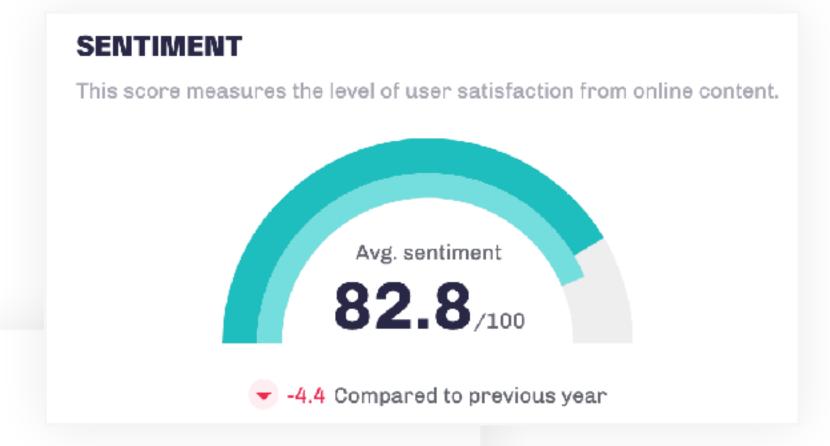
Seoul, South Korea	ICN
New York City, US	JFK
Bangkok, Thailand	BKK
Ben Gurion, Israel	TLV
Los Angeles, US	LAX
New York City, US	EWR
Sao Paulo, Brazil	GRU
Beirut, Lebanon	BEY
Madrid, Spain	MAD
Porto, Portugal	ОРО
	New York City, US Bangkok, Thailand Ben Gurion, Israel Los Angeles, US New York City, US Sao Paulo, Brazil Beirut, Lebanon Madrid, Spain





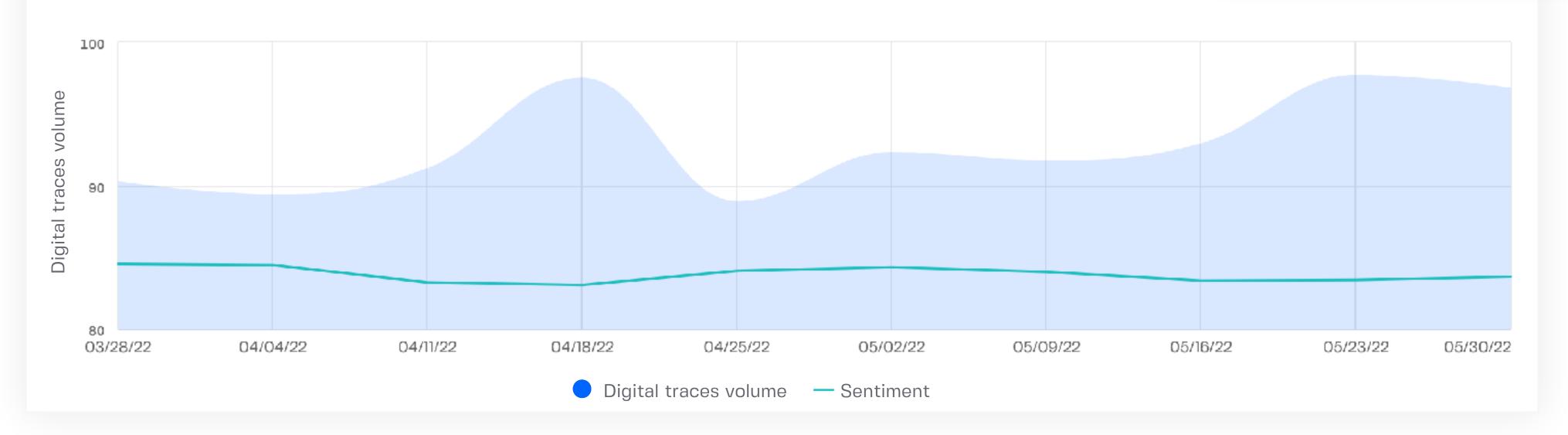
Rewind: Assessing Easter 2022

In Paris, tourists from France, Germany, Italy, and the United Kingdom were the top countries of origin during Easter week 2022, who mainly comprised couples and families. The iconic Tour Eiffel was the most sought-after attraction during this period.



DIGITAL TRACES VOLUME AND SENTIMENT TREND

A timeline overview of digital traces volume, flight arrivals and sentiment trends for the selected period

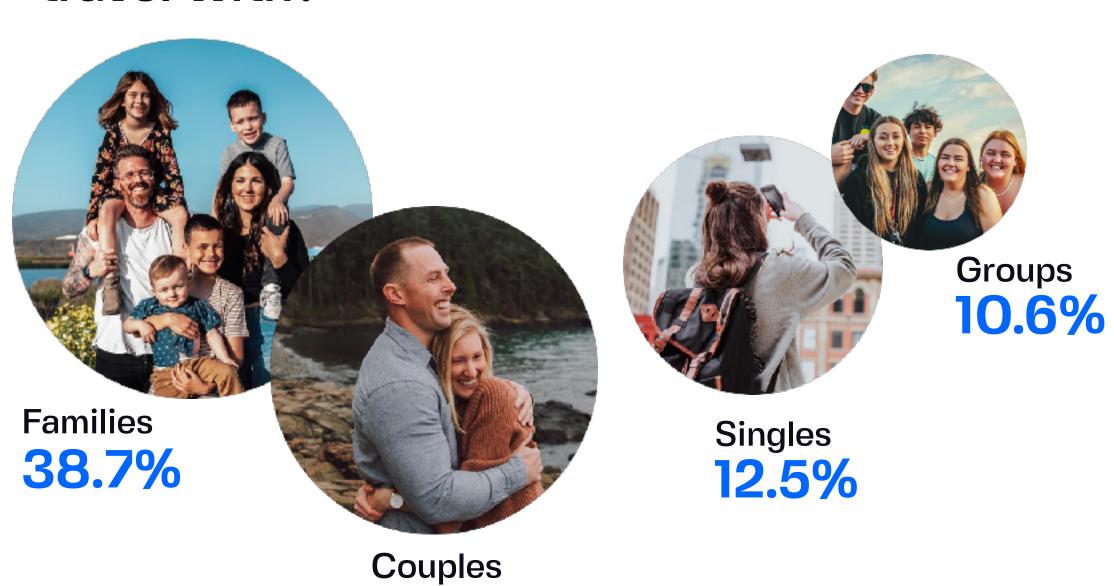






Easter 2022: Travelers in Paris

Who do they travel with?



37.2%

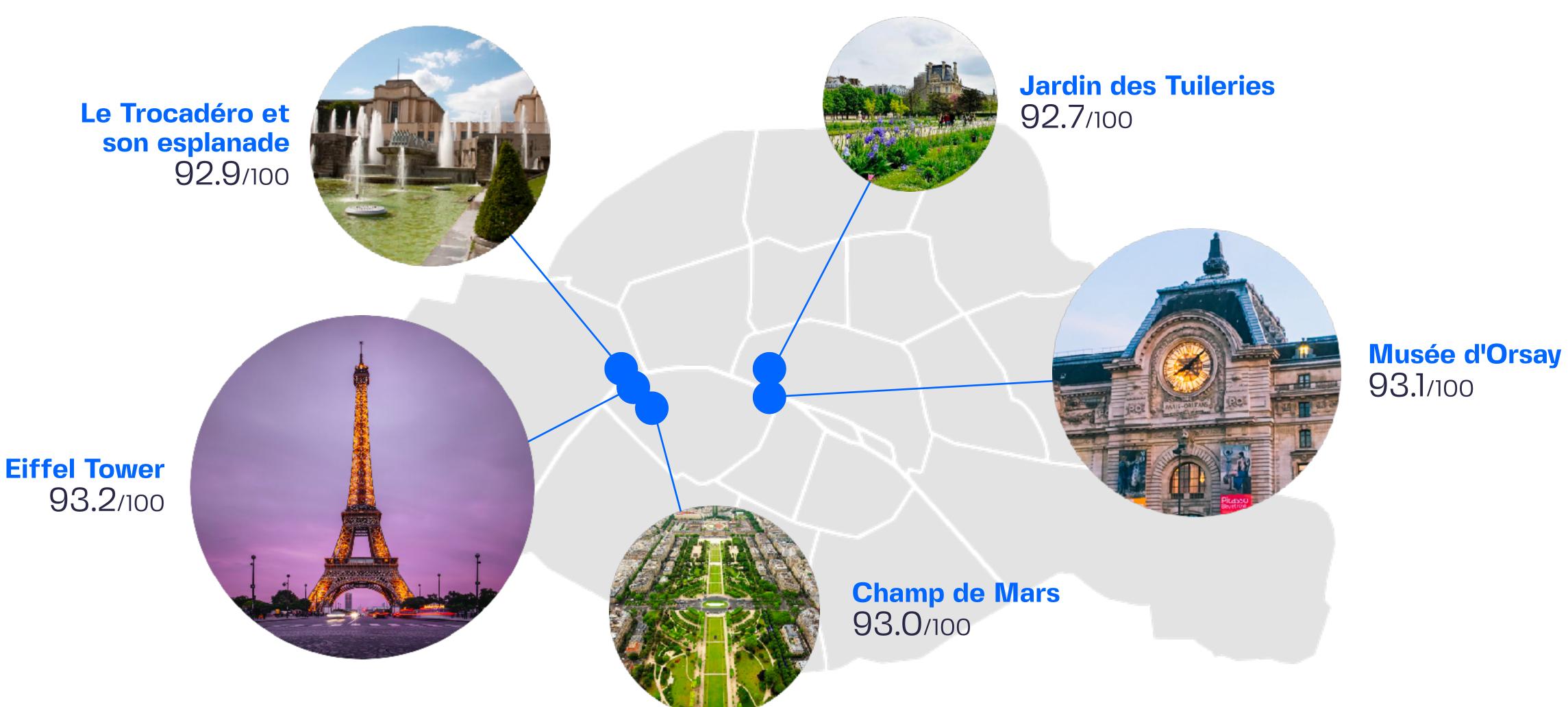
ere did they e from?	DISTRIBUTION
France	22.5%
Germany	11.8%
Italy	8.7%
United Kingdom	8.1%
 Spain	6.8%





Most appreciated attractions

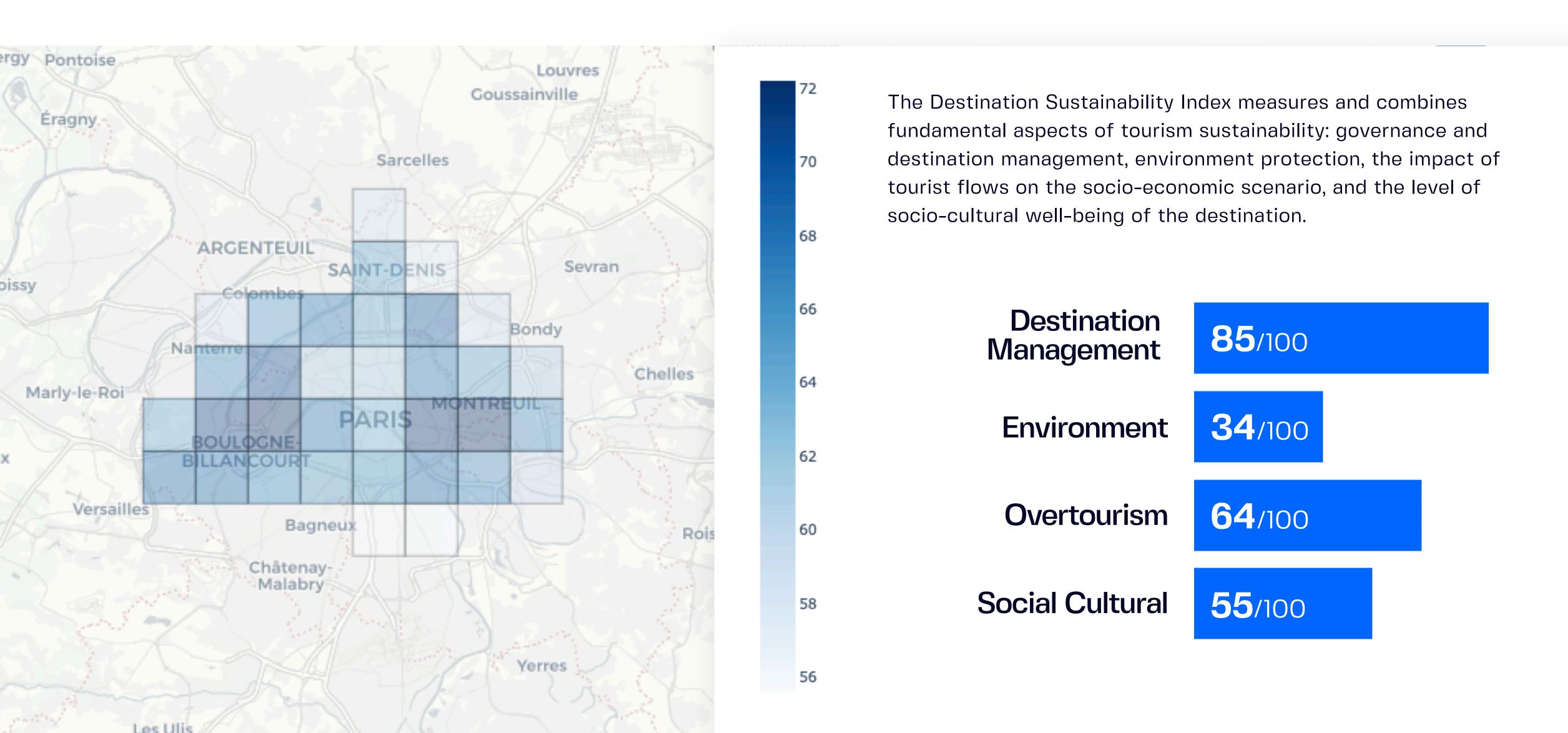
*sentiment score







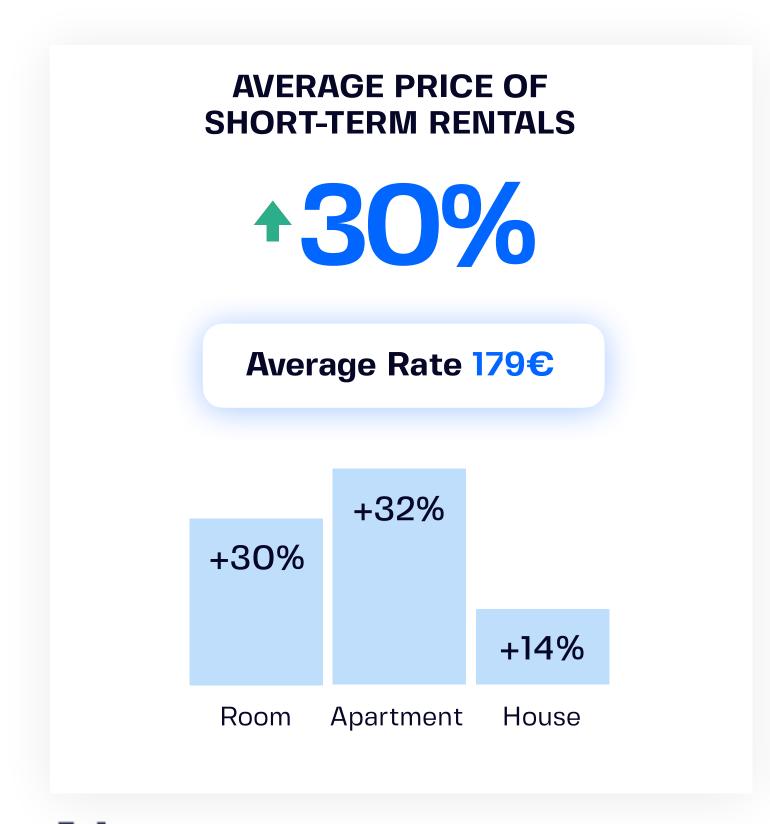
Destination Sustainability Index 59/100





Accommodation Rates increasing spike over Easter

Rome has experienced the highest surge in accommodation prices, with a 34% increase vs 2022, due in part to high inflation, rising costs, and increased international demand. This did not prevent travelers from coming back to the Capital: according to our forecasts, occupancies registered on main OTAs will exceed 2019 by 4%. No doubts Rome is experiencing a full recovery.





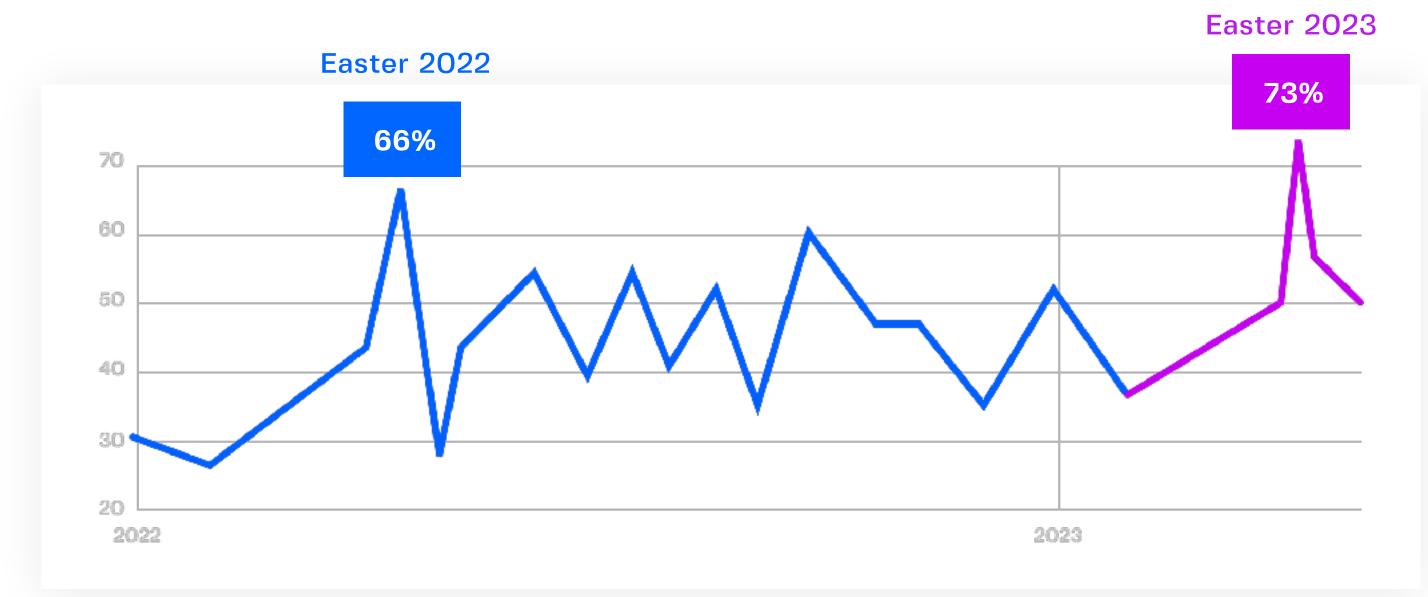


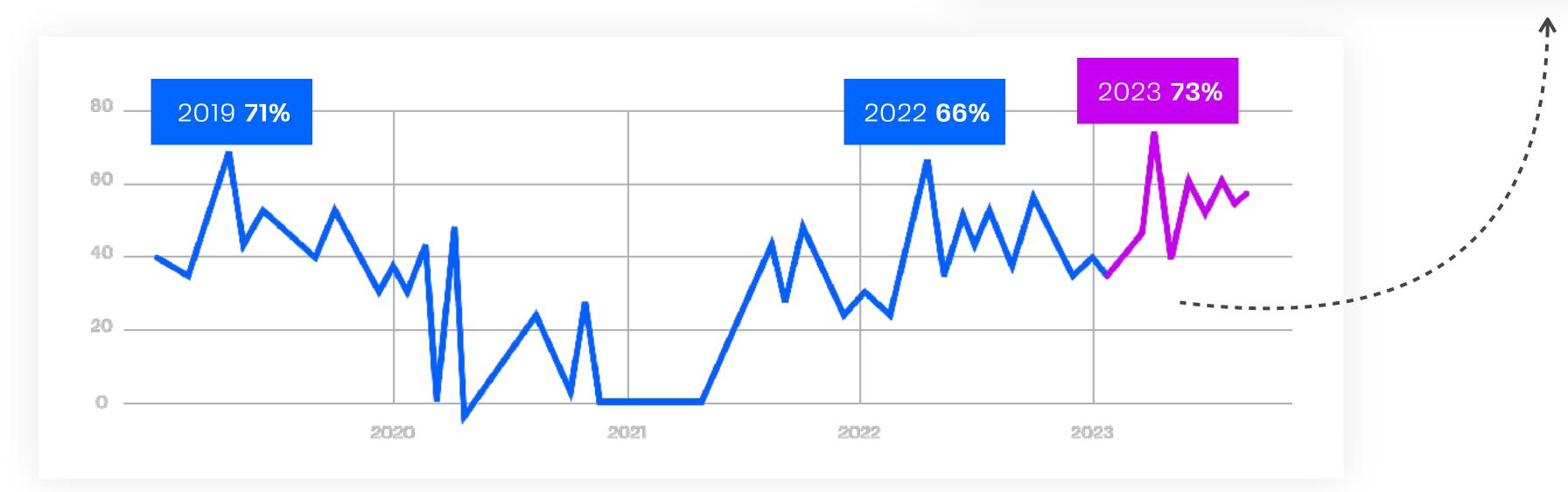
Easter bookings surge past pre-pandemic levels

OTA
SATURATION
FORECAST

People are excited to travel again - and the data shows! Reservations via online travel agencies (OTAs) for the 2023 Easter holidays are anticipated to surpass pre-Covid levels by 2%. Although bookings for Easter 2022 were close to 2019 levels, the saturation reached a maximum of 66% compared to 71% in 2019. In 2023 they should reach an impressive 73%.

Easter Accommodation Bookings Surge Past Pre-Pandemic Levels

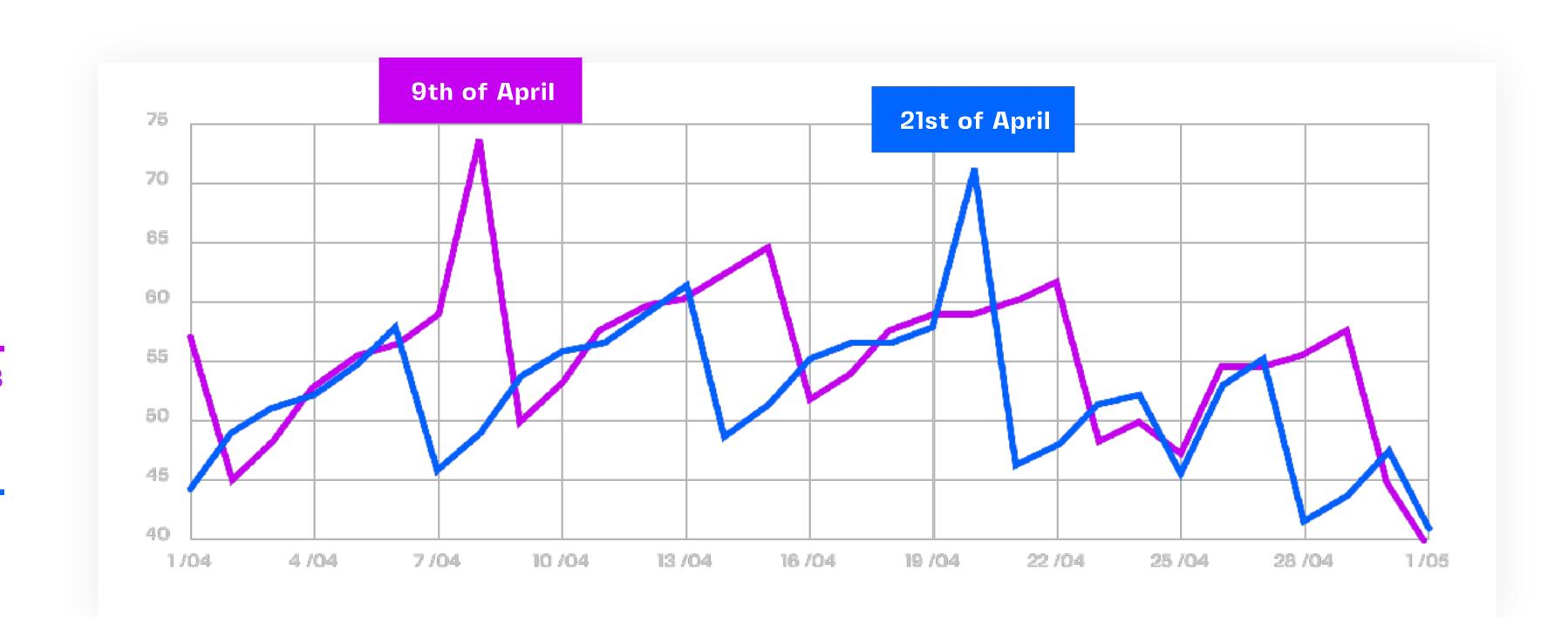








Accommodation Occupancy via OTAs: 2023 Easter Forecast



Easter 2023

Easter 2019





Easter Travel Rebounds Growth in Non-European Flight Arrivals

Europe passengers still account for 37% of the total, but the real news is the comeback of non-European travelers. Bookings via Global Distribution Systems (GDSs) for Easter 2023 show that the US market is set to make a strong comeback. Brazil, Australia, and South Korea are expected to return to 2019 levels too; the rise of Brazilian passengers is mainly due to the post-Covid trend of visiting friends and relatives. Domestic bookings are forecasted to rise due to the shorter booking window for flights.

GDS FLIGHTS FORECAST

Flight Arrivals Where do travelers fly from?

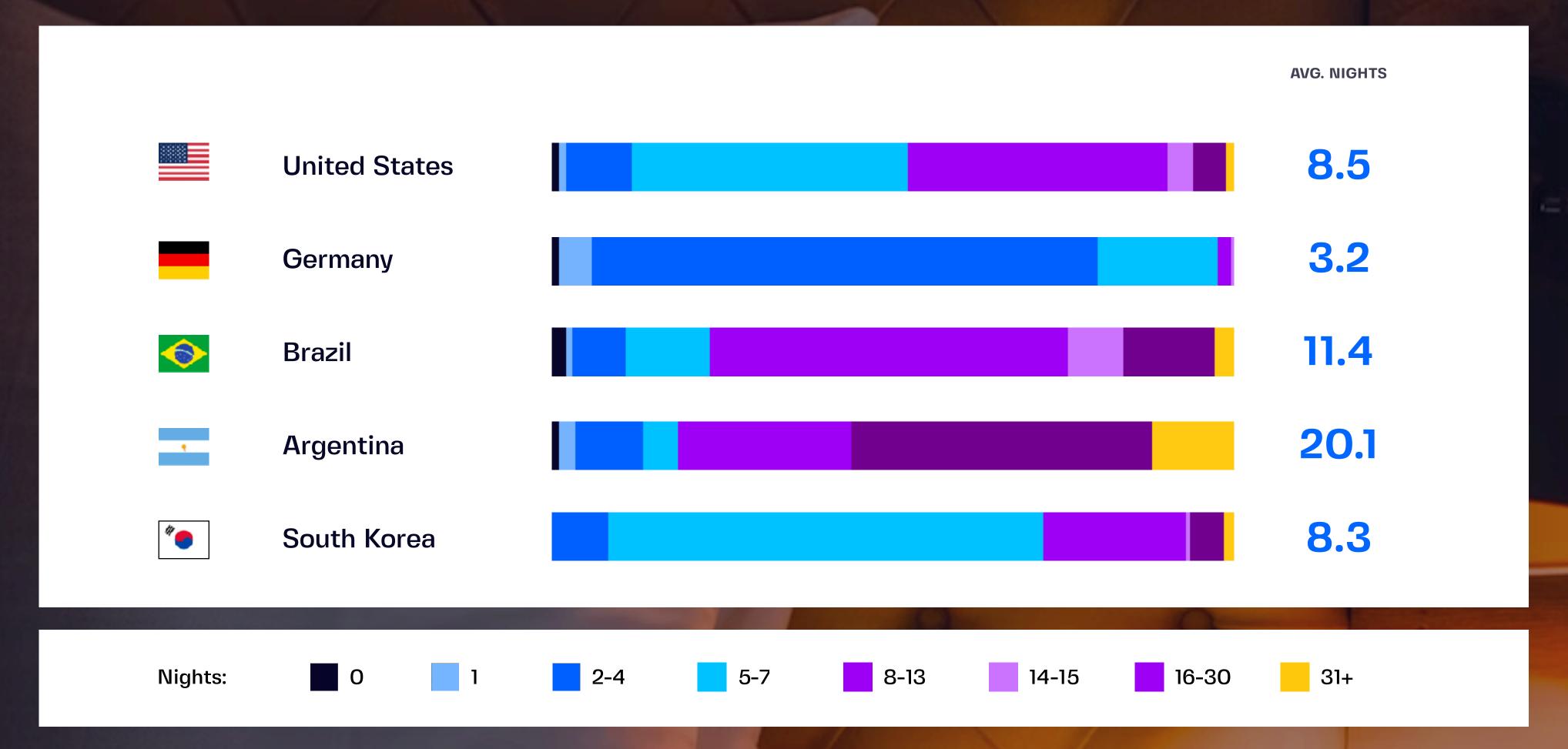


	PASSENGER DISTRIBUTION 2023	PASSENGER DISTRIBUTION 2022	PASSENGER DISTRIBUTION 2019	BOOKING WINDOW DAYS
North America	27.5%	19.5%	17.7%	102,5
South America	11%	2.7%	5.7 %	112,6
Europe	36.6%	54.8%	38.5%	91,8
Asia	8.8%	2.9%	8.4%	86
Middle East	3%	5 %	3.1%	112
Oceania	3.3%	0.6%	2.1%	139





The Majority of Travelers Plan to Stay for More Than 8 Nights



Top 10 Routes to Rome

Reference period:

5-12 April, 2023

Landing airports:

Rome Airports

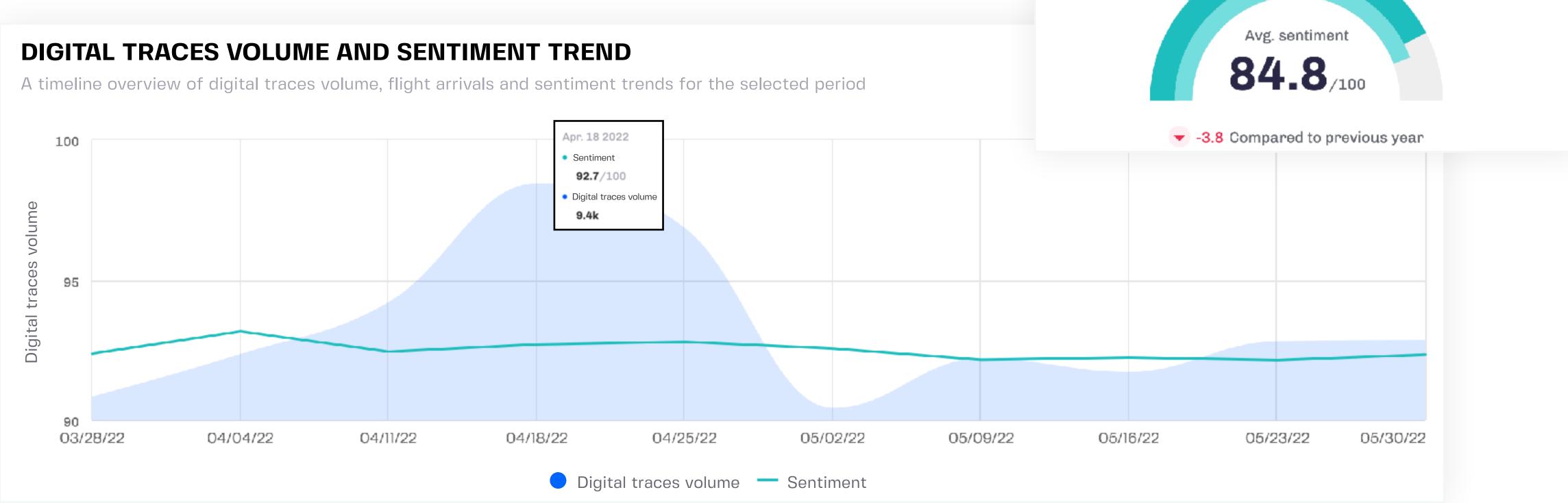


	New York City, US	JFK
**	Incheon, South Korea	ICN
•	Ezeiza, Argentina	EZE
	Sau Paulo, Brasil	GRU
**	Ben Gurion, Israel	TLV
	Munich, Germiany	MUC
	Brussels, Belgium	BRU
· · · · · · · · · · · · · · · · · · ·	Madrid, Spain	MAD
	Paris, France	CDG
	Amsterdam, The Netherlands	AMS



Rewind: Assessing Easter 2022

The Easter holidays in Rome in 2022 saw a surge of travelers, which started a week before Easter Sunday and continued through the first week of May. Approximately 65% of the visitors were from abroad, with the largest groups originating from Spain, Germany, the UK, and France. Families and couples were the most common types of travelers, and the Trevi Fountain and the Pantheon were the most highly sought-after attractions during Easter week.



SENTIMENT

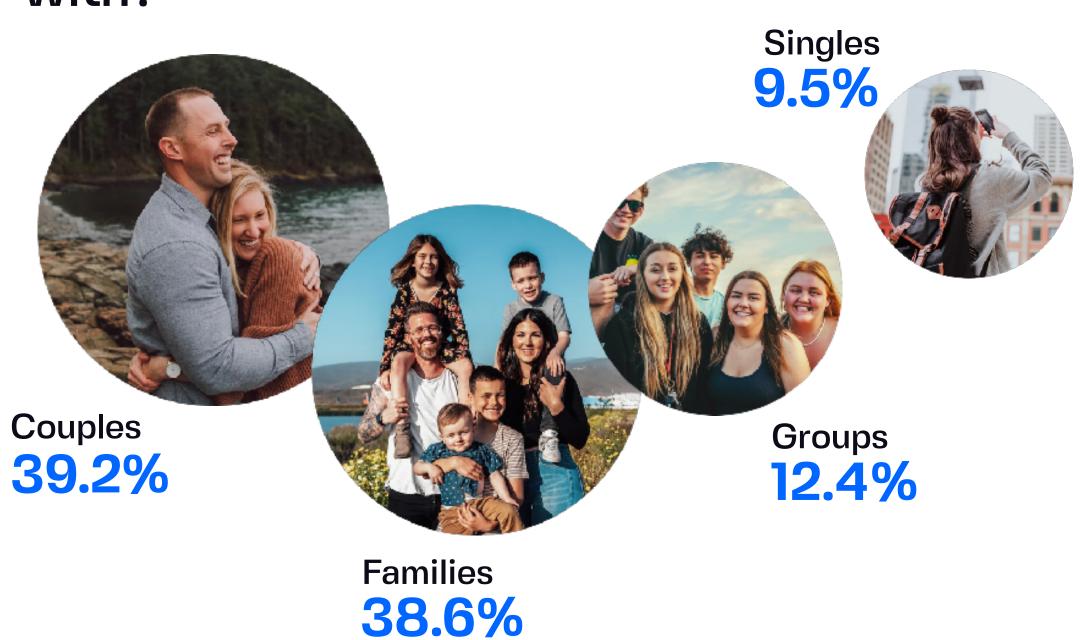
This score measures the level of user satisfaction from online content.





Easter 2022: Travelers in Rome

Who do they travel with?



	ere did they e from?	DISTRIBUTION
	Italy	35.2%
ê K ê	Spain	8.4%
	Germany	6.2%
	United Kingdom	5.8%
	France	5.7%



Most appreciated attractions 2022

*sentiment score

Piazza del Popolo 93.7/100

Trevi Fountain 94.8/100

Piazza Navona 94.6/100



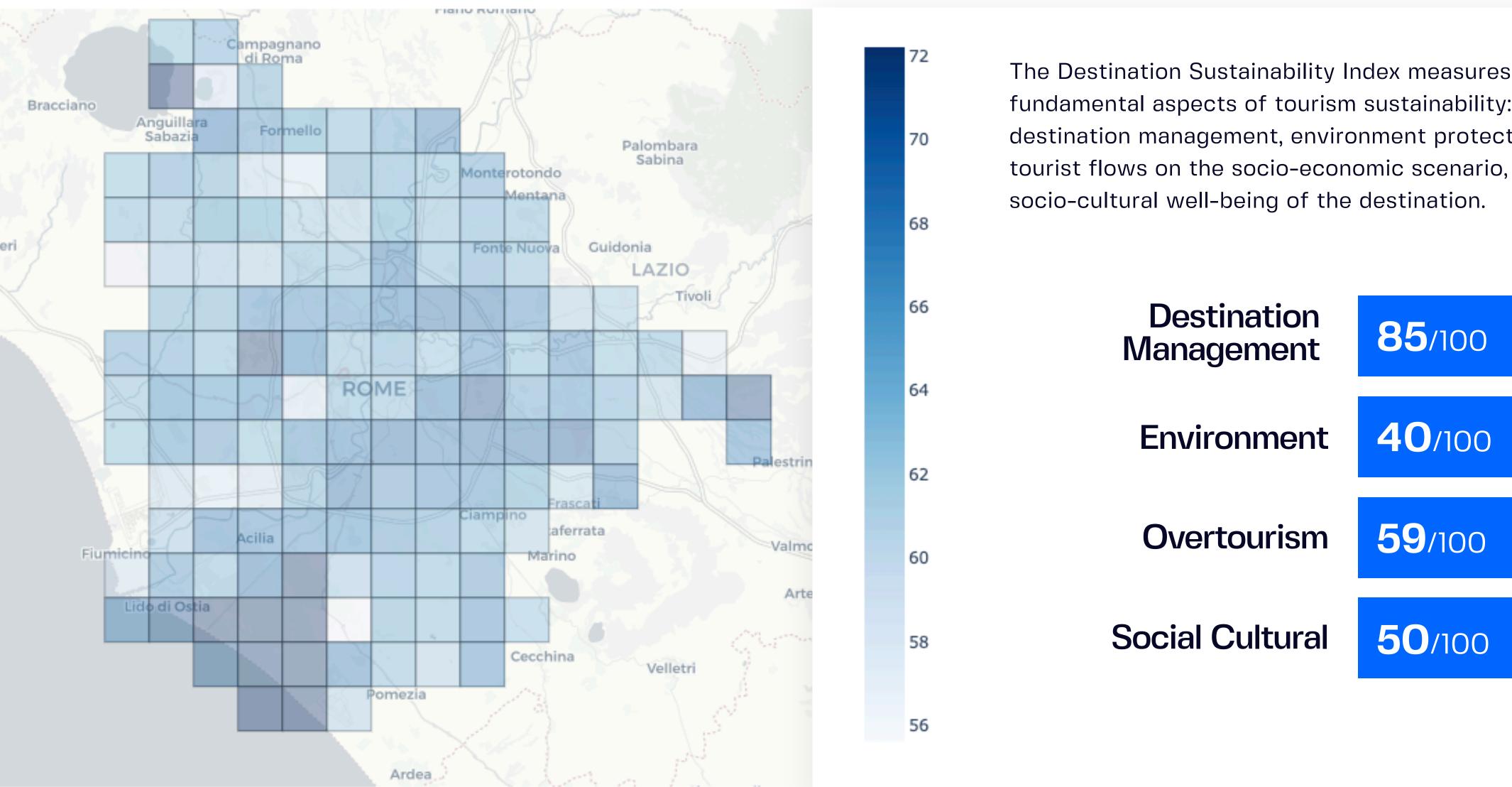
Piazza di Spagna 92/100





Pantheon 95/100

Destination Sustainability Index 59/100



The Destination Sustainability Index measures and combines fundamental aspects of tourism sustainability: governance and destination management, environment protection, the impact of tourist flows on the socio-economic scenario, and the level of



	BARCELONA	BERLIN	PARIS	ROME
Destination Sustainability Index	62/100	58/100	59/100	59/100
Destination management	86/100	83/100	85/100	85/100
Environment	40/100	40/100	34/100	40/100
Overtourism	64 /100	64 /100	64 /100	59 /100
Social Cultural	57 /100	43/100	55 /100	50 /100





Methodology

All the analysed data in this report refers to the Easter week of 2019 (18-25 April), 2022 (13-20 April) and 2023 (5-12 April). Average hospitality rates on OTAs (Online Travel Agencies) have been collected and analysed between the 7th and 14th of February. The analysis involves the cities of Barcelona, Berlin, Paris and Rome.

The Data Appeal Company (formerly Travel Appeal) - acquired in 2022 by Almawave Spa, a company listed on the Euronext Growth Milan market of Borsa Italiana and part of the Almaviva Group - is an Al-based solution provider which enables the actionability of data from a broad range of sources, providing the most powerful combination of Location, Sentiment and Market Intelligence datasets for any Point of Interest, brand or territory worldwide.

Through our proprietary techniques Data Appeal collects, evaluates and monitors the digital presence of **POIs** (points of interest) across any territory through the analysis of over 100 online sources - review channels, portals, websites, OTAs, social media and more. The methodology involves a unique recognition and reconditioning process through an algorithm that aims to maximize the probability that the explored channels are related to the same POI.

After a complex process for ensuring data quality, for each POI detected, its own characteristics - such as location, type, services offered - and of its customers - such as origin, language, type of trip - are explored. The **contents** of the digital human experience (reviews, opinions, comments, ratings, etc.) are read and semantically analyzed through proprietary artificial intelligence mechanisms in natural language, in its original form,



- ▶ SENTIMENT SCORE: The Sentiment Score is a proprietary index that measures the level of satisfaction expressed by travelers through the semantic analysis of content published online about a service, product, brand or territory. In detail, it defines the actual perception of customers towards goods and services, and identifies what influences the purchasing behaviors of current and future buyers to evaluate the value of any brand or territory. The Sentiment is an index ranging from 0 to 100; the higher it is, the more positive the experience will be.
- ▶ CONTENT VOLUME AND SENTIMENT TREND: This explores the relationship between the volume of online content detected over a certain period of time and the qualitative aspect of the traveler experience (Sentiment). The analysis of peaks detected in the volume of content therefore allows for a good estimate of when a destination experienced a period of intense tourist influx; similarly, the analysis of the Sentiment trend will tell us which months or weeks the travel experience was most rewarding.

- ▶ FLIGHTS: Flights data are provided by Travelport and refer to bookings made through Global Distribution Systems (GDS) for all major international airlines (i.e. ITA, British Airways, Delta, Lufthansa, etc...). The data excludes low-cost carries and direct purchases by users via direct bookings.
- We scrape and collect in real-time the rates and active offerings available on the major OTAs (i.e. Booking.com) for accommodation properties and/or short rentals in the selected period. The average price is calculated by taking the avg. prices recorded for each offer available via OTAs. The OTA Occupancy (saturation), instead measures the ratio between the available offerings and the total offerings sold.
- ▶ DESTINATION SUSTAINABILITY INDEX: Both our proprietary data and third-party data, including satellite environmental monitoring data, contribute to the determination of the index. We utilized the European Tourism Indicator System (ETIS), as a reference point.



Data Appeal Studio

Trusted by hundreds of destinations around the globe, Data Appeal Studio provides seamless access to the evaluation of all points of interest across a territory, enriched with Sentiment and Market Trend data, like flights, hotel rates and events.

For each place, Data Appeal Studio detects two aspects:

- Quantitative: volume of analyzed content, for example, number of reviews detected in a certain period.
- Qualitative: quality of feedback expressed by the content, for example, positive or negative review and the main topics/themes (i.e. price quality, location, friendliness of staff, etc.)

Evaluate and benchmark your visitors, local operators and competitors from 360 degrees for the most comprehensive overview of your destination. Measure the impact of marketing campaigns and predict visitor trends with confidence to strategize more effectively.

Data Appeal Studio is the only all-in-one platform which empowers any-sized tourism destination to forecast future arrivals, design hyper-targeted marketing initiatives and enhance the visitor experience.

For more information: www.datappeal.io/data-appeal-studio/

