

Emma Villas Observatory on the presence of tourists in luxury villas and country houses: summer 2024  
report

**2024 HOLIDAYS: LUXURY VILLAS AND RESIDENCES REMAIN A POPULAR CHOICE WITH NUMBERS HOLDING STEADY(+1.6%). IN FIRST PLACE AMONG THE CLIENTS ARE ITALIANS, FOLLOWED BY AMERICANS, GERMANS, THE ENGLISH AND THE DUTCH.**

**THE “REVELATION” REGIONS OF THE SUMMER ARE IN THE NORTH: VENETO/LAKE GARDA AREA (+6%); PIEDMONT (+27%), LOMBARDY (+12%). GOOD RESULTS ALSO FOR CLASSIC DESTINATIONS IN THE SOUTH SUCH AS APULIA AND SICILY**

- *Already surpassed the total number of booked days recorded at the end of the last year, with 6,083 bookings (equivalent to 48,026 nights booked), compared to a total of 6,015 in 2023.*
- *Emma Villas continue their commitment to the virtuous growth of our country through targeted investments in the territory, a commitment confirmed by the recent acquisitions and expansion of the exclusive villa portfolio, which has reached over 650 in Italy alone*
- *Among the most significant trends recorded this summer season: the panorama and the type of clients are changing, with Italians in first place among the nationalities of origin, followed by Americans, Germans, the English and the Dutch*

Chiusi, 17 October – No more summer outfits, goodbye summer hits, autumn is officially here. But while we change the season, the official data for summer 2024, regarding the holidays (June-September), is arriving. Summer 2024 has proved to be a success for domestic tourism: according to Fipe (Federazione Italiana Pubblici Esercizi = Italian Federation of Public Businesses), over **79% of Italians** chose a domestic destination and, more generally, Italy recorded around **215 million tourist presences**, an increase of 1.6% compared to 2023. Confirmation of the trend also comes from the data for vacation rental, that is, short-term rentals of luxury villas and country houses which, in the summer season just over at the end of September, are recording stable numbers: **7,756 weeks have been booked for villa and country house rentals**, with an average stay of about 1.3 weeks per booking. The numbers are in line with those of the national tourism sector equal to **+1.6% of the number of weeks booked compared to last year (7,633 in 2023)**. In addition to the positive confirmations recorded in the south such as in Sicily (+21%) and Apulia (+35%), even in the face of a strengthening of the portfolio, the true surprise of the season that has just ended was northern Italy. Awarded the title of “Summer Revelation Regions” are, in fact, Piedmont (+27%), Lombardy (12%) and the Lake Garda area (+6% and with growing demand).

This has been revealed by the Observatory of **Emma Villas**, a leading company in the vacation rental sector of luxury villas and residences that has reached to date a villa portfolio of around **700 properties in Italy and quoted on the Euronext Growth Milan segment** and which, with 6,083 bookings (equivalent to 48,026 nights booked), has exceeded the total number of days booked recorded at the end of the last year (compared to the total of 6,015 in 2023). The company has recorded a positive trend in the northern regions, such as in Veneto to Lake Garda, the result of the **company's recent investments in this area**. The data from **Apulia and Sicily** is also part of a policy of portfolio expansion oriented towards the high quality standards that make Emma Villas a guarantee of holiday and relaxation.

*“We can say that, despite the complex framework in which we have been operating, in the 2024 season the vacation rental sector has shown remarkable resilience; we have maintained, after the post-Covid boom year, a trend of growth in the number of tourists welcomed into our structures. The megatrend of high temperatures, which could paradoxically generate difficulties in the high season, the increasingly long summer season, the tendency of tourists to book just before the holiday, the chronic high cost of flights, inflation and international instability, are all elements that*

*must be constantly faced with energy and competence with an eye already on 2025 which, for us operators of the sector, has already begun. Since the beginning of 2024, - says Giammarco Bisogno, President and CEO of Emma Villas Group – in order to meet demand, we have acquired over 100 new properties that will gradually enter full production".*

**NORTHERN REVIVAL: LOMBARDY CONQUERS THE UNDECIDED BETWEEN SEA OR MOUNTAIN (+12% BOOKINGS). "LAKE MANIA": +6% BOOKINGS ON LAKE GARDA (VENETO SIDE), THANKS TO THE RECENT ACQUISITIONS OF EMMA VILLAS ON THE VENETO SIDE OF THE LAKE (42 STRUCTURES).**

Surprisingly, Lombardy, with its mountains, lakes and cities of art, is also one of the top choices for tourists in the sector of luxury villas and residences: with **125 weeks** booked, the Region has recorded a **+12%** in the number of bookings compared to 2023 and seems to convince - with its beautiful lakes - the eternal undecided between sea or mountain. The Region, with **23.8 million overnight stays recorded** in the first half of 2024 alone, celebrated a growth in regional tourism of 11.5%.

Encouraging the flows is a renewed **passion for the lakes, and not just for Lake Como**. A trend that is confirmed by the **growing interest in Lake Garda**, which has always been celebrated for its beauty. With its lush vegetation and the mountains reflected in the water, with its villages and rich cultural offer, Lake Garda is confirmed as a popular destination in every season, so much so that there has been a 12% increase in **presences in summer** compared to 2023, accounting for more than 60% of the total visitors to the province. "Lake passion" seems, therefore, to be an increasingly consolidated trend, **also for tourism of luxury villas and residences (+6% bookings at Lake Garda between May and September)** increasingly chosen by German (+46.6%), English (12.5%) and American (11.2%) tourists. For this reason, Emma Villas has decided to invest in the Garda area by acquiring 42 residences immersed in nature (13 of which have already been published and can be visited on the [emmavillas.com](http://emmavillas.com) website), with breathtaking views of the lake, and enveloped in the centuries-old history of these Lombard and Venetian lands, from Manerba to Torri del Benaco, passing through Garda, Bardolino and Lazise.

**SICILY: THE ISLAND OF THE SUN BEWITCHES ALL, THE QUALITATIVE-QUANTITATIVE GROWTH OF THE PORTFOLIO BRINGS UP THE BOOKINGS OF LUXURY VILLAS AND RESIDENCES BY +21%.**

A land of myths and legends, a land between East and West, Sicily is much more than an island and boasts a cultural heritage that has the contours of a continent. While the island famously enjoys an evergreen tourism, **its charm has managed to captivate a "new" segment, that of the vacation rental**. A passion that is confirmed by positive numbers also for the vacation rental segment, and which, in terms of presences this year, have placed it among the **top regions of the summer** with **637 booked weeks**; summer bookings are up by **+21% (vs 2023)**, with a **trend of bookings that has been steadily increasing since 2021**. Results reflecting the investments of Emma Villas in the region which, in 2024 alone, enabled the expansion of the portfolio on the island by a further 12 villas (+26% compared to last year, reaching a total of 59 properties). The Region has therefore witnessed an increase in bookings of luxury villas and residences, also assisted by the increase of tourist flows linked to short-stay rentals on the island (1.83 million presences, equal to approximately +50% compared to 2023).

**APULIA PASSION: THE EVER-INCREASING INTEREST IN THIS REGION, THANKS TO ITS CRYSTAL-CLEAR SEA, THE BEAUTY OF ITS TOWNS AND SUBLIME FOOD, IS LEADING TO A GROWING NUMBER OF VILLAS AVAILABLE AND TO AN INCREASE IN BOOKINGS OF +35%**

Caribbean beaches, crystal-clear sea, towns with ancient history and charming villages: Apulia is the ideal destination for every type of travel, even the most prestigious. The growing interest in this region has led Emma Villas to new acquisitions that have widened the offer of available villas and have allowed them to reach **424 booked weeks, recording a growth of +35% in the number of bookings for the summer season compared to 2023**. The Region is, therefore, particularly popular and boasts a stable growth trend, which has permitted it, in the villa rental segment, to rank in the **top 5 Regions with the highest number of bookings in Italy**. A virtuous growth, in line with the latest data from the sector: according to the Regional Tourism Observatory of Apulia, in the first eight months of 2024, the presence in the Region increased by 4% compared to the same period last year, for a total of 15 million 339 thousand registered presences. A passion for the heel of the Boot also shared by international

and national celebrities, such as the actor **Stefano Accorsi who chose an Emma Villas structure** for his summer getaway and also Fiorello and Gianni Morandi in love with the beauty of Salento.

## VACATION RENTAL, THE 2024 HOLIDAY TRENDS: FLEXIBILITY AND DOMESTIC TOURISM, A SECTOR HOLDING UP AFTER THE POST-COVID BOOM, AMID RECORD TEMPERATURES AND INTERNATIONAL INSTABILITY

**The 2024 season has been characterised by a complex global context due to economic factors and climate instability. Despite this, the vacation rental sector has demonstrated great resilience and the number of tourists accommodated in the properties of Emma Villas, the market leader, has grown, confirming the validity of the acquisition strategy in areas of high tourist vocation and in properties with high quality standards able to meet the demands of international guests.**

What have been the most significant summer trends in this sector? **The real news is the predilection of our compatriots for their own country: this year Italy ranks first among the nationalities of origin of Emma Villas clients** with a percentage equal to 14.29% of the total, followed by the USA (13.91%), Germany (13.60%), the United Kingdom (13.46%) and the Netherlands (9.01%). On the other hand, the principal Italian holiday-makers are those from Lombardy (42.3%), Lazio (13.8%) and Emilia (8.8%). The provinces from which most bookings for this type of holiday are made are the large metropolises, with Milan in the lead (20.1% of the total), Rome (12.9%) and the Milanese province of Monza-Brianza (4.5%). In addition to the typology of clients, an interesting fact is the possibility of making **flexible bookings: appreciated by 38% of the guests of Emma Villas**, it is an increasingly essential feature, destined to become a travel must-have capable of satisfying more and more clients and responding to different travel needs (cheaper midweek flights etc.), guaranteeing, at the same time, high quality standards and an unforgettable holiday experience.

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*Emma Villas is an Italian Incoming Tour Operator, operating in the sector of weekly tourist rentals of luxury villas and country houses with private pools. It currently manages, on an exclusive basis, over 650 properties throughout Italy, welcoming over 55,000 international guests every year. Property Management, Smart Hospitality, dedicated Concierge 7/7, Guest & Property Protection, exclusive services and experiences are among the elements that characterise the Emma Villas model.*

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