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SHORT-TERM RENTALS OBSERVATORY

South-East Sicily

Foreign tourism and non-hotel accommodation in the 9 gems, from Ortigia to Marina di Ragusa

2026 report on 2025 data · November 2026 · Version 1.1

Source: Osservatorio Turistico della Regione Siciliana (Sicilian Regional Tourism Observatory).
Elaboration by Marzamemi.com. Provisional data, subject to revision.

Preface

What this report is for and how to read it

The *South-East Sicily Short-Term Rentals Observatory* sets out, every year, the official tourism data for the nine gems of Marzamemi.com: Ortigia, Avola, Noto, Marzamemi, Portopalo, Marina di Ragusa, Scicli, Modica and Ragusa Ibla. The public figures already exist, but they come out by province and by municipality, in files that almost nobody opens. Here they become indicators that are the same for every gem, so that the gems can be compared.

This first edition starts from **2025** data, the latest available, from the *Osservatorio Turistico della Regione Siciliana* (the Sicilian Regional Tourism Observatory). The figures are provisional and may be revised. Four gems do not have a municipality of their own (Ortigia, Marzamemi, Marina di Ragusa and Ragusa Ibla): for them the figure of the municipality they belong to applies.

A methodological choice: where a comparison does not hold, because the survey has changed, the report says so and stops. **Better a declared gap than a forced number.**

COMMENT

> The numbers say two things. The first: in the nine gems foreign guests already account for a very large share of nights, and in some of them, such as Noto, Ortigia and Avola, they are more than half. The second: the gems are not all the same. The share of foreign guests, the length of stay and the weight of summer all differ. For those who host guests and for those who tell the story of this area, knowing these differences is more useful than a regional average. We chose to show the limits of the data as well, because a number quoted badly does more harm than no number at all.
>
> **Andrea Infante**
> Responsible for the report · Founder of Marzamemi.com

What you will find in this report

- **Summary:** the main points and how to read the numbers
- **1. Nine gems, nine profiles:** foreign nights, share, length of stay and seasonality
- **2. What has really changed:** trend 2022-2024 and the weight of summer
- **3. Who offers what:** beds by type of accommodation
- **4. The gems one by one:** a profile for each
- **5-8. The context:** the provinces of Syracuse and Ragusa, 2025 vs 2024
- **Methodological note:** sources, definitions, limits, how to cite and contacts

Summary

2025 in the nine gems: who comes, how long they stay, when they arrive

1.55 m	+19.2%	53.6%	+29.9%
nights of foreign guests in the municipalities of the 9 gems, 2025	foreign nights in the South-East, 2025 vs 2024 (Syracuse + Ragusa)	share of foreign guests in nights in the South-East (48.1% in 2024)	foreign nights in non-hotel accommodation in the South-East (hotels: +5.2%)

Five foreign nights out of six, among the municipalities with published data, fall in the nine gems.

- **The weight of the gems.** In 2025 guests residing abroad spent 1,549,489 nights in the municipalities of the nine gems: 83.3% of those in the South-East municipalities for which *ISTAT* publishes data. Ortigia, Marina di Ragusa and Ragusa Ibla sit inside the municipalities of Syracuse and Ragusa, which publish one figure each.
- **In Noto, Ortigia and Avola foreign guests are more than half.** The shares: Noto 61.1%, Ortigia 59.6%, Avola 55.5%. Then Marina di Ragusa and Ragusa Ibla (48.7%), Modica (40.8%), Scicli (35.6%) and Marzamemi (33.7%). Portopalo is the exception, at 15.8%.
- **Scicli and Avola keep guests longer.** The average stay of foreign guests is **5.4 nights** in Scicli and 4.4 in Avola, against 3.0 in Ortigia and 2.9 in Portopalo.
- **Summer does not weigh the same everywhere.** In Portopalo July and August make up 59.1% of nights, in Marzamemi 49.6%, in Scicli 49.4%. In Ortigia only 30.6%, in Noto 34.7%.
- **From 2022 to 2024 almost everything grows.** With the same survey: Marzamemi **+224%**, Scicli +82%, Ortigia and Ragusa +60%, Avola +53%. Noto is flat. 2025 cannot be compared with earlier years, because ISTAT changed the way it counts.
- **The provincial picture.** In the South-East foreign nights rise by 19.2%, against 8.2% for Sicily. The drivers are holiday homes, B&Bs and rentals (+29.9%), not hotels (+5.2%).
- **A word of caution.** The 2025 data are provisional. Since 2025 the *CIN* (national identification code) has been mandatory and ISTAT also counts private, non-business rentals: part of the increase in non-hotel accommodation may be a new way of counting, not new demand.

How to read the numbers

Arrivals: people who check in at an accommodation. *Overnight stays*, called «nights» here: the nights spent. *Foreign guests*: guests residing abroad. Official data are published by municipality, so each gem is matched to its own. For 2025 the comparison between gems is sound, because all municipalities use the same survey.

1. Nine gems, nine profiles

Foreign nights, share, length of stay and season, 2025

Official data are published by municipality. Ortigia sits inside the municipality of Syracuse, Marzamemi inside that of Pachino, Marina di Ragusa and Ragusa Ibla inside that of Ragusa: for the last two the figure is the same. The table treats every gem in the same way, in geographical order from Ortigia to Marina di Ragusa.

Gem (municipality)	Foreign nights 2025	Share of nights	Average stay	Change 2022-24	July and August	Beds 2025
Ortigia (Syracuse)	809,384	59.6%	3.0 nights	+60%	30.6%	26,941
Avola	48,707	55.5%	4.4 nights	+53%	46.3%	6,535
Noto	206,972	61.1%	3.4 nights	0% †	34.7%	13,297
Marzamemi (Pachino)	15,535	33.7%	3.6 nights	+224%	49.6%	3,779
Portopalo	5,453	15.8%	2.9 nights	+14%	59.1%	1,682
Marina di Ragusa (Ragusa)	272,596	48.7%	3.2 nights	+60%	39.4%	15,262
Scicli	85,417	35.6%	5.4 nights	+82% †	49.4%	6,183
Modica	105,425	40.8%	3.5 nights	+22% †	37.5%	6,525
Ragusa Ibla (Ragusa)	272,596	48.7%	3.2 nights	+60%	39.4%	15,262

Table G1. Data for the municipalities of the 9 gems. Foreign nights: nights of guests residing abroad. Share, average stay and July-August refer to 2025. Change 2022-24 refers to foreign nights. † break in series declared in 2023 or 2024. Source: Osservatorio Turistico della Regione Siciliana.

Where foreign nights concentrate

Syracuse dominates: 809 thousand foreign nights, almost three times Ragusa (273 thousand). Noto follows with 207 thousand. At the other end, Portopalo, with 5 thousand.

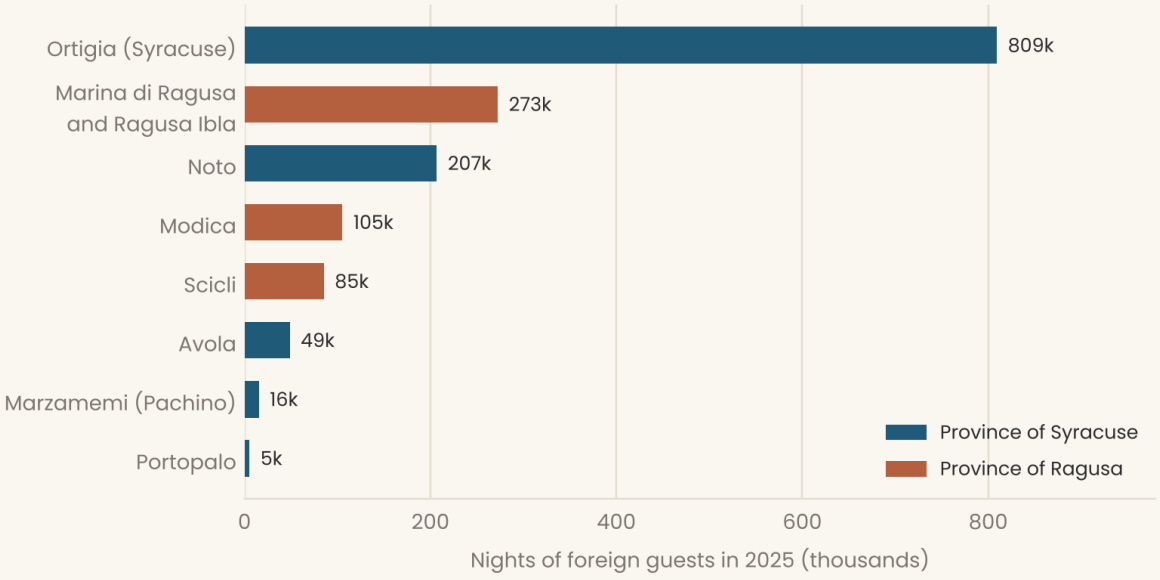


Chart G1. Nights of foreign guests in the municipalities of the 9 gems, 2025. Marina di Ragusa and Ragusa Ibla share the figure of the municipality of Ragusa.

How much foreign guests weigh

Above 55%, foreign guests are the majority: this happens in Noto, Ortigia and Avola. In Portopalo they are about **one in six**.

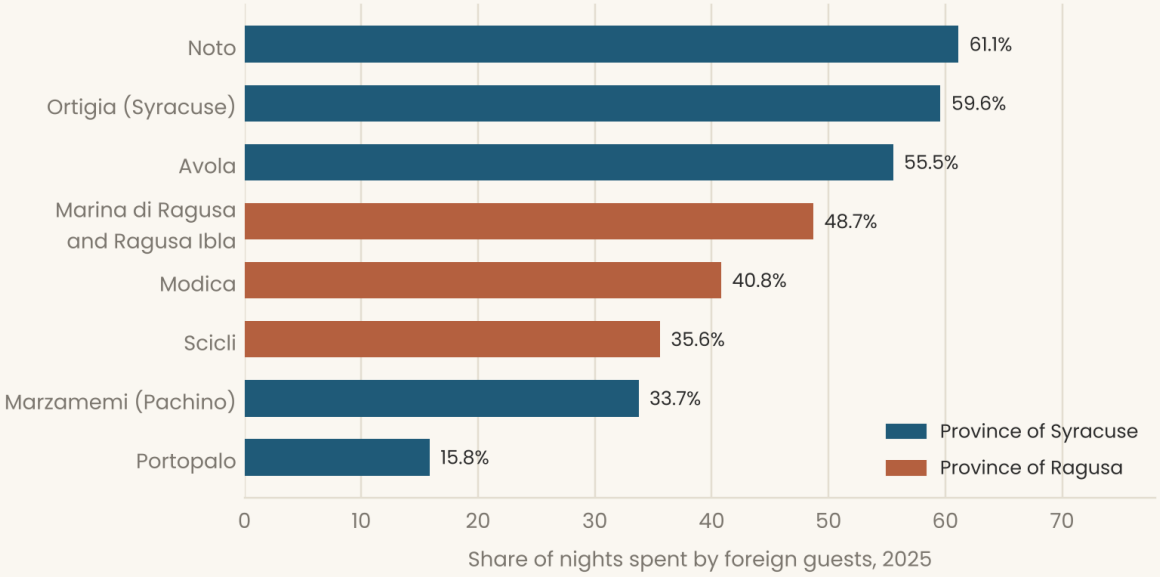


Chart G2. Share of nights spent by foreign guests out of total nights, 2025.

2. What has really changed

Trend 2022-2024 and the weight of summer

Between 2025 and 2024 a comparison for each gem is not possible: since 2025 *ISTAT* includes private, non-business rentals in its flows and declares the data not comparable with earlier years. To measure the trend, the **2022-2024** period remains, when the survey was the same. The result: every gem grows, except Noto, which stays flat.

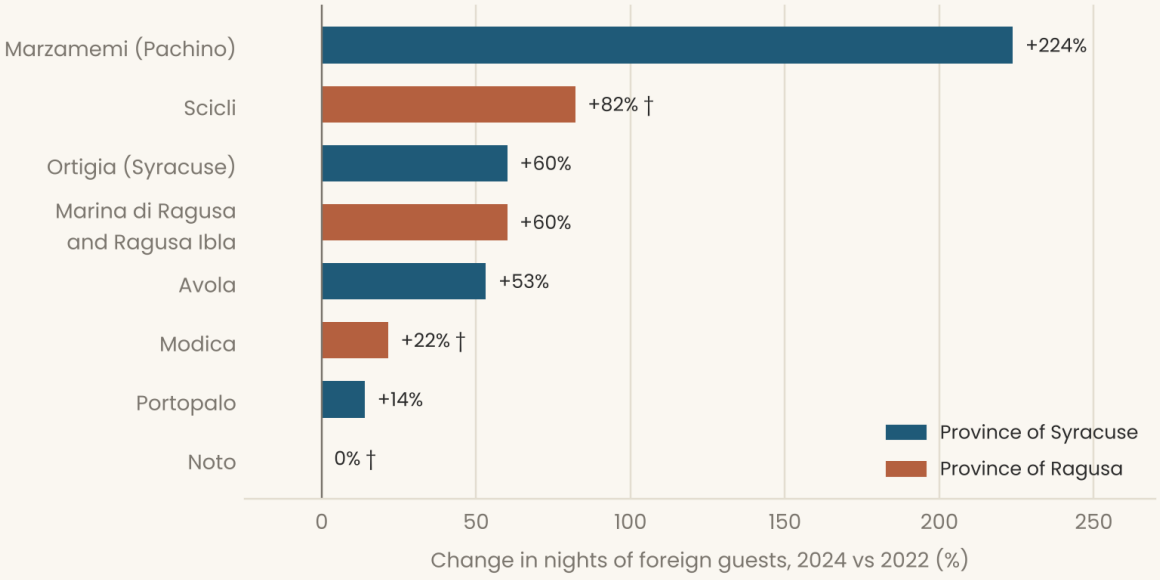


Chart G3. Change in nights of foreign guests, 2024 vs 2022. † ISTAT reports a break in the series in 2023 (Scicli, Modica) or in 2024 (Noto): for these municipalities the value should be read with caution. 2022 still reflects the recovery after the pandemic.

Summer does not weigh the same everywhere. In Portopalo, Marzamemi and Scicli, July and August account for about half of the year's nights, or more. In Ortigia, Noto, Modica and Ragusa they stay

below 40%: there, demand is spread over more months.

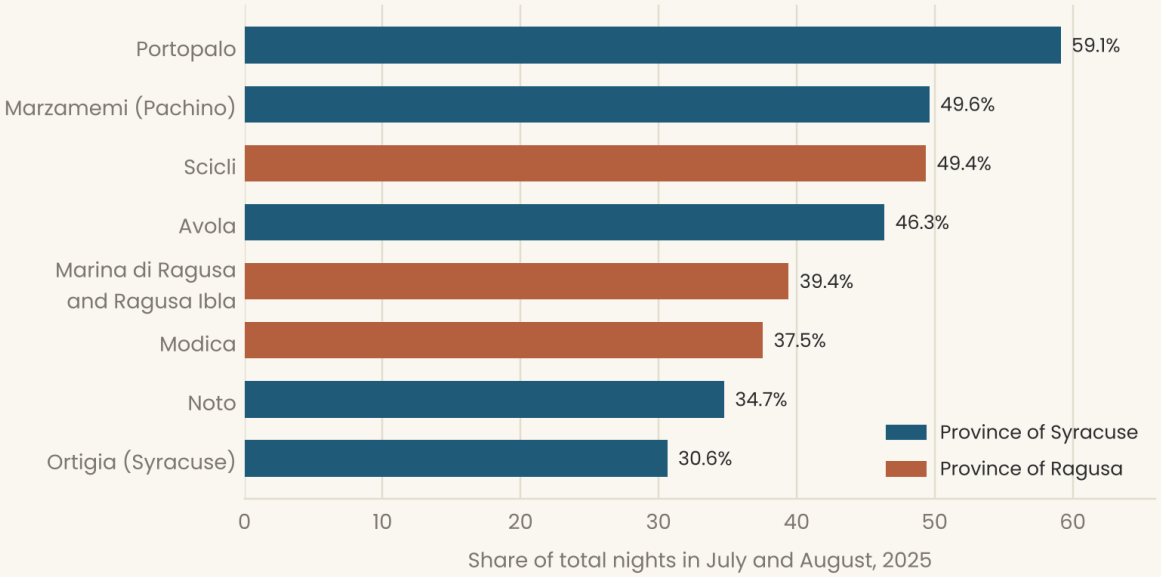


Chart G4. Share of total nights (Italian and foreign guests) in July and August, 2025.

3. Who offers what

Beds by type of accommodation, 2025

In 2025 *ISTAT* also counts private, non-business rental accommodation, and the picture changes: in **seven municipalities out of eight** rentals are the largest share of beds. They are 84.7% in Pachino and 82.2% in Avola; they fall to 41.8% in Ragusa, where hotels weigh more.

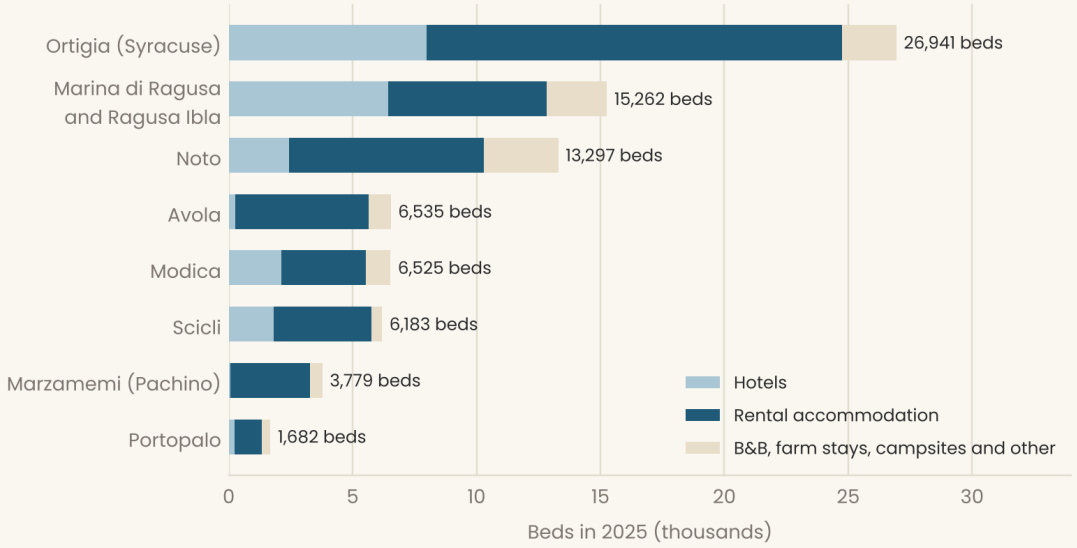


Chart G5. Beds in the municipalities of the 9 gems, 2025. «Rental accommodation» includes both business-run and non-business rentals. Not comparable with earlier years.

> **A caveat**
> A snapshot, not growth: for the first time, 2025 shows the full private supply. For business-run supply over time, see chapter 8.

Source: Osservatorio Turistico della Regione Siciliana. Elaboration by Marzamemi.com. 2025 data are provisional.

4. The gems one by one

The same indicators for all nine, in geographical order

Ortigia
The elegant heart of Syracuse

809,384

nights of foreign guests, 2025
Share of nights: **59.6%**
Average stay: **3.0 nights**
July and August: **30.6%**
Change 2022-24: **+60%**
Beds: **26,941**
Data for the municipality of Syracuse, which includes Ortigia

Avola
Land of sea, wine and almonds

48,707

nights of foreign guests, 2025
Share of nights: **55.5%**
Average stay: **4.4 nights**
July and August: **46.3%**
Change 2022-24: **+53%**
Beds: **6,535**
Municipal data

Noto
The most iconic Baroque of Sicily

206,972

nights of foreign guests, 2025
Share of nights: **61.1%**
Average stay: **3.4 nights**
July and August: **34.7%**
Change 2022-24: **-0% †**
Beds: **13,297**
Municipal data

Marzamemi
The most iconic village of the South-East

15,535

nights of foreign guests, 2025
Share of nights: **33.7%**
Average stay: **3.6 nights**
July and August: **49.6%**
Change 2022-24: **+224%**
Beds: **3,779**
Data for the municipality of Pachino, which includes Marzamemi

Portopalo
The southernmost village in Europe

5,453

nights of foreign guests, 2025
Share of nights: **15.8%**
Average stay: **2.9 nights**
July and August: **59.1%**
Change 2022-24: **+14%**
Beds: **1,682**
Municipal data

Marina di Ragusa
The refined face of the Hyblaean sea

272,596

nights of foreign guests, 2025
Share of nights: **48.7%**
Average stay: **3.2 nights**
July and August: **39.4%**
Change 2022-24: **+60%**
Beds: **15,262**
Data for the municipality of Ragusa, shared with Ragusa Ibla

Scicli
A masterpiece of golden stone and Baroque light

85,417

nights of foreign guests, 2025
Share of nights: **35.6%**
Average stay: **5.4 nights**
July and August: **49.4%**
Change 2022-24: **+82% †**
Beds: **6,183**
Municipal data

Modica
Between Baroque and Sicilian sweetness

105,425

nights of foreign guests, 2025
Share of nights: **40.8%**
Average stay: **3.5 nights**
July and August: **37.5%**
Change 2022-24: **+22% †**
Beds: **6,525**
Municipal data

Ragusa Ibla
A jewel suspended in time

272,596

nights of foreign guests, 2025
Share of nights: **48.7%**
Average stay: **3.2 nights**
July and August: **39.4%**
Change 2022-24: **+60%**
Beds: **15,262**
Data for the municipality of Ragusa, shared with Marina di Ragusa

† break in series declared by ISTAT in 2023 or 2024. The lines under each name are the gem headlines on Marzamemi.com.

The context: the provinces of Syracuse and Ragusa

Provincial data from the regional Tourism Observatory, which allow a 2025 vs 2024 comparison

5. The South-East: foreign up, Italian down

Arrivals and nights in the provinces of Syracuse and Ragusa, 2025 vs 2024

In 2025 foreign guests spent **1,942,963 nights** in accommodation in the South-East, against 1,630,335 in 2024: **+19.2%**. Arrivals grow less (+11.9%, from 506,546 to 566,899) because guests stay longer: the average stay rises from 3.2 to 3.4 nights. Italians go the other way: -4.5% in nights and -1.3% in arrivals.

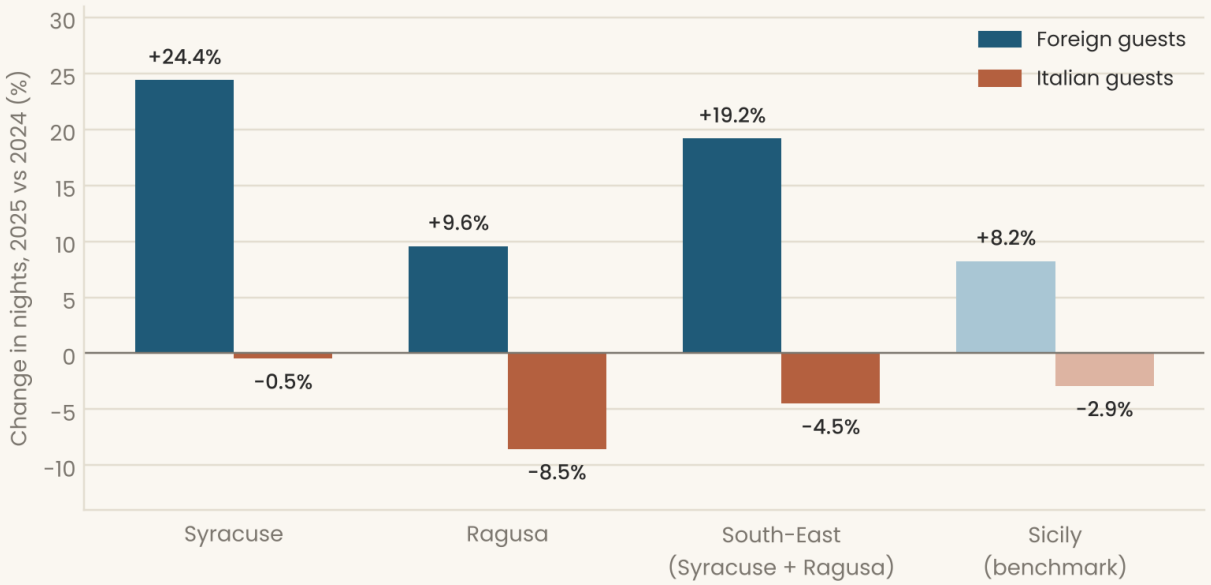


Chart P1. Percentage change in nights, 2025 vs 2024, by guests' origin. Sicily is the sum of the nine provinces, calculated on the same file.

	Foreign arrivals 2024	Foreign arrivals 2025	Change	Foreign nights 2024	Foreign nights 2025	Change	Italian nights, change
Syracuse	346,543	399,244	+15.2%	1,055,970	1,313,604	+24.4%	-0.5%
Ragusa	160,003	167,655	+4.8%	574,365	629,359	+9.6%	-8.5%
South-East	**506,546**	**566,899**	**+11.9%**	**1,630,335**	**1,942,963**	**+19.2%**	**-4.5%**
Sicily (benchmark)	3,755,041	4,073,426	+8.5%	12,233,847	13,241,336	+8.2%	-2.9%

Table P1. Arrivals and nights of foreign guests, hotels and non-hotel accommodation combined. Source: Osservatorio Turistico della Regione Siciliana, provisional data.

To gauge the weight of foreign guests, look at their share of total nights. In the South-East it rises from 48.1% to **53.6%** and passes half. In Syracuse it reaches 59.9%, in Ragusa 44.0%: there the clientele remains more Italian.

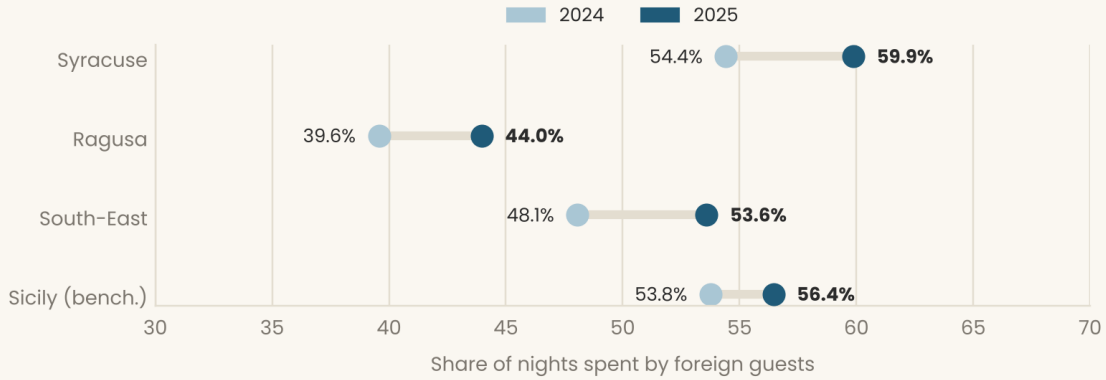


Chart P2. Share of nights spent by foreign guests out of total nights.

6. Holiday homes and B&Bs make the difference

Hotels and non-hotel accommodation compared

The rise in foreign nights lies outside hotels. In the South-East, nights in non-hotel accommodation (holiday homes and apartments, B&Bs, farm stays, campsites) go from 924,225 to 1,200,194: **+29.9%**. In hotels growth is 5.2%. As a result, non-hotel accommodation rises to 61.8% of foreign nights, from 56.7%.

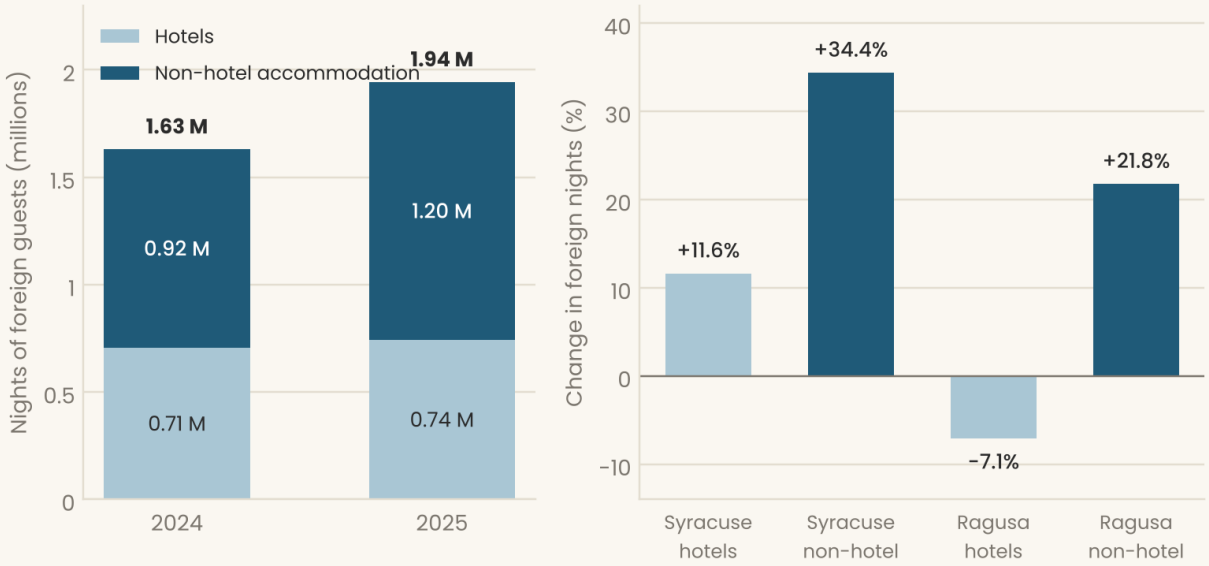


Chart P3. On the left, foreign nights by type of accommodation in the South-East; on the right, the change by province and type.

Type and province	Foreign nights 2024	Foreign nights 2025	Change	Average stay 2024	Average stay 2025
South-East, hotels	**706,110**	**742,769**	**+5.2%**	**2.9 nights**	**2.9 nights**
South-East, non-hotel	**924,225**	**1,200,194**	**+29.9%**	**3.5 nights**	**3.9 nights**
Syracuse, hotels	463,301	517,155	+11.6%	2.8 nights	2.8 nights
Syracuse, non-hotel	592,669	796,449	+34.4%	3.3 nights	3.7 nights
Ragusa, hotels	242,809	225,614	-7.1%	3.0 nights	3.1 nights
Ragusa, non-hotel	331,556	403,745	+21.8%	4.2 nights	4.3 nights

Table P2. Nights and average stay of foreign guests by type of accommodation. Average stay: nights divided by arrivals.

Guests who choose non-hotel accommodation stay longer: 3.9 nights on average against 2.9 in hotels. In Ragusa, foreign guests in non-hotel accommodation stay **4.3 nights**, the highest value in the South-East.

How to read non-hotel accommodation

Regional data are provisional. Non-hotel accommodation includes holiday homes, B&Bs, farm stays and campsites: it does not coincide with «short-term rentals», because the files do not isolate rental accommodation. Since 1 January 2025 the *CIN*, the national identification code for tourist accommodation, has been mandatory. *It is a hypothesis, which these data cannot prove*, that accommodation already active but barely visible has entered the statistics and that part of the increase is emergence rather than new demand. The firmest comparison remains that of hotels: Syracuse +11.6%, Ragusa -7.1% in foreign nights.

7. The engine is the shoulder months

Nights of foreign guests by month in the South-East

59.4% of foreign nights in 2025 fall between April and June and between September and October. July and August together account for 26.8%. Those five months produced 185,458 of the 312,628 extra nights compared with 2024, or 59.3% of the increase. The peak month is September, with 285,895 nights.

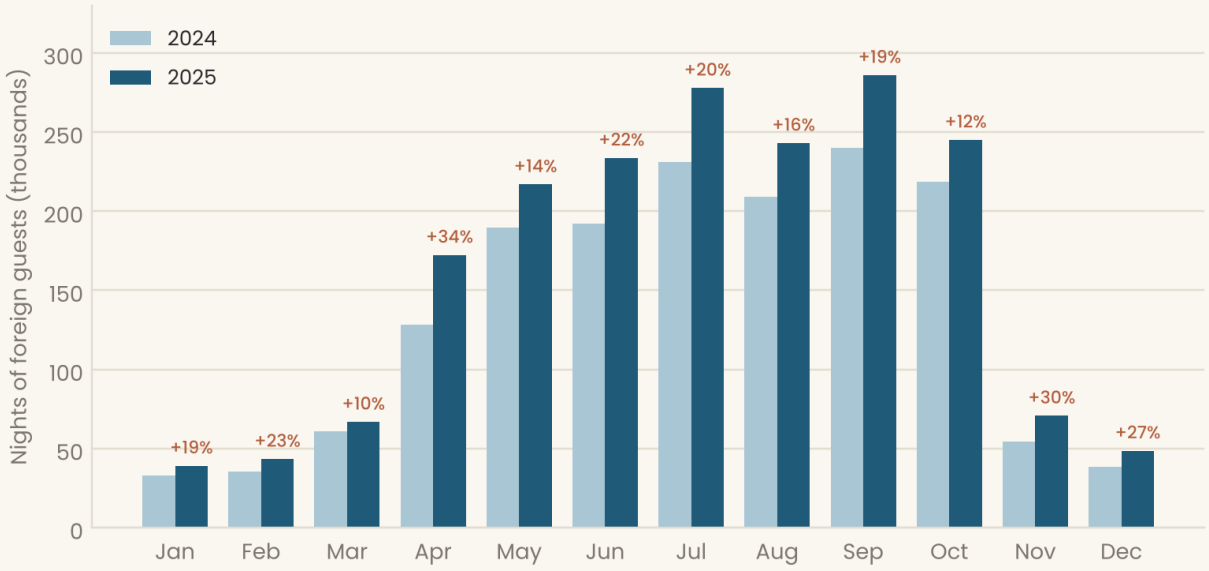


Chart P4. Nights of foreign guests by month, 2024 and 2025. In red, the percentage change.

Month	Foreign nights 2024	Foreign nights 2025	Change
January	32,883	39,114	+18.9%
February	35,242	43,319	+22.9%
March	61,001	66,808	+9.5%
April	128,298	172,271	+34.3%
May	189,435	216,896	+14.5%
June	192,025	233,572	+21.6%
July	231,275	277,812	+20.1%
August	209,121	242,993	+16.2%
September	239,952	285,895	+19.1%
October	218,470	245,004	+12.1%
November	54,256	70,691	+30.3%
December	38,377	48,588	+26.6%
Year	**1,630,335**	**1,942,963**	**+19.2%**

Table P3. Nights of foreign guests by month, Syracuse and Ragusa combined. Source: Osservatorio Turistico della Regione Siciliana, provisional data.

April (+34.3%) is partly a calendar effect: Easter fell on 20 April in 2025 and on 31 March in 2024. Winter months start from small numbers, so the percentages are high but the volumes are modest.

8. Supply: what grows and what is only counted

Beds and accommodation in the two provinces

According to the Region, the South-East has **49,761 beds** at the end of 2025, 2.1% more. Supply grows far less than foreign demand (+19.2% in nights). Where it grows is in business-run rental accommodation: in Syracuse from 513 to 659 units (+28.5%), in Ragusa from 397 to 420 (+5.8%).

Category (Syracuse + Ragusa)	Establishments 2024	Establishments 2025	Change	Beds 2024	Beds 2025	Change
Hotels and tourist residences	273	284	+4.0%	25,771	26,034	+1.0%
Rental accommodation (business-run)	910	1,079	+18.6%	7,997	8,991	+12.4%
Bed and breakfast	641	641	0.0%	3,931	3,968	+0.9%
Farm stays (agriturismi)	277	293	+5.8%	6,563	6,798	+3.6%
Campsites and holiday villages	22	22	0.0%	4,014	3,524	-12.2%
Total non-hotel	**1,863**	**2,048**	**+9.9%**	**22,951**	**23,727**	**+3.4%**
Grand total	**2,136**	**2,332**	**+9.2%**	**48,722**	**49,761**	**+2.1%**

Table P4. Accommodation stock at 31 December, South-East. Source: Osservatorio Turistico della Regione Siciliana, provisional data. «Rental accommodation» means business-run rentals.

A different count: private rentals in the ISTAT data

ISTAT data on accommodation capacity for 2025 count **11,614 rental dwellings and 60,744 beds** in the South-East (Syracuse 7,817, Ragusa 3,797), against 712 dwellings the year before. This is not growth in supply: an official note explains that from 2025 private, non-business rentals are also included, and for this reason the values are not comparable.

Comparison with the 1,079 business-run dwellings registered by the Region suggests that most rentals in the area are held by private owners who are not businesses. *This is a reading of the numbers, not something stated by the sources*, and it will need checking once more years of a consistent series are available.

> **Why it matters**
> Anyone reading the official statistics on non-hotel tourism in 2025 faces a change of method. The 2025 vs 2024 changes in rental accommodation, in the ISTAT data, do not measure growth. The 2025 values are instead the first full picture of private supply.

Methodological note and sources

How the numbers were built, and where the limits are

Area and period

Each gem is matched to the municipality it belongs to: Ortigia to Syracuse, Avola to Avola, Noto to Noto, Marzamemi to Pachino, Portopalo to Portopalo di Capo Passero, Marina di Ragusa and Ragusa Ibla to Ragusa, Scicli to Scicli, Modica to Modica. The South-East in the provincial chapters is the sum of the provinces of Syracuse and Ragusa, with a 2025 vs 2024 comparison. 2025 is the latest year of the official statistics.

Sources

- *Osservatorio Turistico della Regione Siciliana* (Sicilian Regional Tourism Observatory, Department of Tourism, Sport and Entertainment), «Movimenti turistici» section of regione.sicilia.it. Monthly and annual provincial data on arrivals and nights by origin and by type of accommodation, accommodation stock 2024-2025 (provisional); municipal data on arrivals and nights, annual and monthly, and on accommodation capacity, with ISTAT definitions and methodological notes.
- *ISTAT, Statistica Flash «Flussi turistici», Q2 2026* (14 September 2026): definitions and methodological note on the movement of guests in accommodation establishments.

Definitions (ISTAT)

- **Arrivals:** people who checked in at an accommodation establishment in the period. **Overnight stays (nights):** nights spent by guests.
- **Non-resident guests:** guests residing abroad. In this report they are called «foreign guests».
- **Non-hotel accommodation:** campsites, holiday villages, private rental dwellings (business-run and not), farm stays, holiday houses, hostels, mountain huts, bed and breakfasts and other establishments. It is not a synonym for «short-term rentals». From 2025 the municipal statistics include the ISTAT category «Other private accommodation».

Calculations and limits

- Percentage changes are calculated by Marzamemi.com from absolute values. «Sicily» is the sum of the nine provinces of the same file.
- Regional data for 2025 are **provisional** and may be revised. Figures may differ from other publications for the same period because of different update stages.
- Municipal data for 2025 carry the official note of **non-comparability** with earlier years for rental accommodation and for the total. Comparison between gems in 2025 is sound; comparison over time stops at 2022-2024.
- In some municipalities ISTAT reports a break in the series (Scicli and Modica in 2023, Noto in 2024): they are marked with †.
- Since 1 January 2025 the *CIN* has been mandatory for tourist accommodation. Its effects on the statistics cannot be measured with these data.
- Guests' nationalities are published by the Region only for the whole of Sicily and are not included. Ortigia, Marzamemi, Marina di Ragusa and Ragusa Ibla have no figure of their own: the municipality's figure is used.

What we know about 2026

On 14 September 2026 ISTAT published the national figure for the second quarter: total nights +3.9%, nights of non-resident guests +4.6%, non-hotel nights of non-resident guests +6.4%; non-residents are 61.6% of nights. This is a national figure: for the gems and for the South-East, 2026 is not yet available.

How to cite

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marzamemi.com

Marzamemi.com is a portal of accommodation in South-East Sicily, from Ortigia to Marina di Ragusa. It puts guests in direct contact with owners, with no commission on enquiries.

Responsibility and contacts

For data, clarifications, interviews and requests for further information.

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