GENOVA
GENOA

ANALYSIS FIELDS

1. General framework
   The municipality of Genoa

2. Attractiveness
   • Nomisma 121 Score
   • Territorial benchmarking

3. FOCUS ON
   • Attractiveness assets
GENERAL FRAMEWORK
Municipality analysis

Genoa

SURFACE AREA
240.3 km²

POPULATION
583,601 inhabitants

DENSITY
2,429 inhabitants/km²

DISTANCE FROM THE MAIN CITIES*:

ROME
496 km

TURIN
172 km

MILAN
148 km

* Road travel distance

Airport: YES

High speed railway: YES

Nearest port: GENOA
ATTRACTIVENESS
ITALY2INVEST is the first integrated platform of Urban Data Intelligence that offers data to measure ATTRACTIVENESS, COMPETITIVENESS and WELLNESS OF ITALIAN TERRITORIES together with the advice to support the choices of investors and policy makers. Attractiveness is a complex measure that expresses the ability of a territory to attract, enhance and keep strategic resources, capital, technologies and human resources.

The methodological approach adopted by ITALY2INVEST to measure the attractiveness provides these following steps:

- Implementation of a definitional scheme that allows to map different conceptual fields of a territory’s attractiveness in a multidimensional way
- Identification of 8 domains that contribute to the determination of attractiveness
- Data collection strategy that has identified and systematized 22 public and private sources with municipal data
- Database design including 250 indicators for 7998 Italian municipalities
- Implementation of an algorithm of data reduction to simplify data into summarizing indicators for each domain and into NOMISMA I2I SCORE
Italy2Invest – Methodology

DATA

• Collection (+250 indicators)
• Cleaning
• Modeling
• Reduction
• Transformation

STEP 1
Data preparation

STEP 2
Aggregation of indicators in 8 analysis domains

STEP 3
NOMISMA I2I SCORE

8 DOMAINS OF ANALYSIS
1. Environment
2. Socio-Economic Conditions and Education
3. Business
4. Real Estate Market
5. Public Administration and Justice
6. Population
7. Services (allocations and expenditure)
8. Tourism

SOURCE: Nomisma Italy2Invest
NOMISMA I2I SCORE – Overview

Synthetic index of municipalities attractiveness

**I2I Nomisma SCORE**

62.5

**RANKING ITA**

28/7998

**Total ITALIAN MUNICIPALITIES**

- **I2I SCORE – minimum**: 28.7
- **I2I SCORE – maximum**: 75.3
- **I2I SCORE – average**: 45.8

**PROVINCIAL CAPITALS**

- **I2I SCORE – minimum**: 46.0
- **I2I SCORE – maximum**: 75.3
- **I2I SCORE – average**: 57.3

**METROPOLITAN CITIES**

- **I2I SCORE – minimum**: 49.8
- **I2I SCORE – maximum**: 75.2
- **I2I SCORE – average**: 63.4

*Nomisma I2I SCORE
Range [0; 100]*

SOURCE: Nomisma Italy2Invest

www.italy2invest.it
### Top20 – Goods

Top20 port cities for goods flows (2017 data)

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>NOMISMA I2I SCORE</th>
<th>Ranking I2I ITA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Trieste</td>
<td>64.4</td>
<td>14</td>
</tr>
<tr>
<td>2.</td>
<td>Genoa</td>
<td>62.5</td>
<td>28</td>
</tr>
<tr>
<td>3.</td>
<td>Cagliari</td>
<td>60.4</td>
<td>71</td>
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<tr>
<td>4.</td>
<td>Livorno</td>
<td>59.8</td>
<td>95</td>
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<tr>
<td>5.</td>
<td>Gioia Tauro</td>
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<td>Augusta</td>
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<td>7.</td>
<td>Messina</td>
<td>50.4</td>
<td>2012</td>
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<td>8.</td>
<td>Ravenna</td>
<td>58.1</td>
<td>191</td>
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<td>9.</td>
<td>Venice</td>
<td>60.1</td>
<td>79</td>
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<tr>
<td>10.</td>
<td>Naples</td>
<td>58.4</td>
<td>164</td>
</tr>
<tr>
<td>11.</td>
<td>Taranto</td>
<td>59.5</td>
<td>1970</td>
</tr>
<tr>
<td>12.</td>
<td>La Spezia</td>
<td>60.3</td>
<td>76</td>
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<tr>
<td>15.</td>
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<td>52.5</td>
<td>1231</td>
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<td>16.</td>
<td>Ancona</td>
<td>61.1</td>
<td>52</td>
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<td>17.</td>
<td>Brindisi</td>
<td>49.7</td>
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<td>Catania</td>
<td>51.8</td>
<td>1450</td>
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<td>19.</td>
<td>Olbia</td>
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<td>626</td>
</tr>
<tr>
<td>20.</td>
<td>Palermo</td>
<td>54.6</td>
<td>631</td>
</tr>
</tbody>
</table>

### Top20 – People

Top20 port cities for people flows

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>NOMISMA I2I SCORE</th>
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<tr>
<td>1.</td>
<td>Messina</td>
<td>50.4</td>
<td>2012</td>
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<td>Naples</td>
<td>58.4</td>
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</tr>
<tr>
<td>3.</td>
<td>Piombino</td>
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<td>4.</td>
<td>Olbia</td>
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<td>626</td>
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<td>1231</td>
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<td>95</td>
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<td>9.</td>
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<td>Bari</td>
<td>58.4</td>
<td>166</td>
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<td>Ravenna</td>
<td>58.1</td>
<td>191</td>
</tr>
<tr>
<td>20.</td>
<td>Carrara</td>
<td>54.5</td>
<td>681</td>
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</table>
NOMISMA I2I SCORE – Territorial Benchmarking

Territorial comparison: attractiveness compared to the target of interest

NOMISMA I2I SCORE

SOURCE: Nomisma Italy2Invest

GENOA

Average port cities Top20 – GOODS* 62,5
Average port cities Top20 – PEOPLE** 57,7

I2I SCORE Differential compared to the Metropolitan Cities' average

I2I SCORE Differential compared to the Provincial Capitals' average

*Top 20 port cities for goods flows
**Top 20 port cities for people flows
Territorial comparison: attractiveness compared to the target of interest

**Nomisma I2I Score**

**Genoa**

- I2I Score Differential compared to the Top20 - Goods*
  - 9.1

- I2I Score Differential compared to the Top20 - People**
  - 8.3

*Top 20 port cities for goods flows
**Top 20 port cities for people flows

Source: Nomisma Italy2Invest
FOCUS ON Attractiveness assets
### NOMISMA I2I SCORE – Each domain's contribution

The contribution of the analyzed domains in the definition of the attractiveness of Genoa and of Top 20 port cities (goods and people).

<table>
<thead>
<tr>
<th>GENOA</th>
<th>Average port cities – TOP 20 GOODS*</th>
<th>Average port cities – TOP 20 PEOPLE**</th>
</tr>
</thead>
<tbody>
<tr>
<td>REAL ESTATE MARKET</td>
<td>14,8%</td>
<td>REAL ESTATE MARKET</td>
</tr>
<tr>
<td>TOURISM</td>
<td>14,8%</td>
<td>TOURISM</td>
</tr>
<tr>
<td>SERVICES (ALLOCATIONS AND EXPENDITURE)</td>
<td>14,0%</td>
<td>SERVICES (ALLOCATIONS AND EXPENDITURE)</td>
</tr>
<tr>
<td>SOCIO-ECONOMIC CONDITIONS AND EDUCATION</td>
<td>13,0%</td>
<td>POPULATION</td>
</tr>
<tr>
<td>POPULATION</td>
<td>12,0%</td>
<td>SOCI-ECONOMIC CONDITIONS AND EDUCATION</td>
</tr>
<tr>
<td>BUSINESS</td>
<td>11,4%</td>
<td>BUSINESS</td>
</tr>
<tr>
<td>PUBLIC ADMINISTRATION</td>
<td>11,1%</td>
<td>PUBLIC ADMINISTRATION</td>
</tr>
<tr>
<td>ENVIRONMENT</td>
<td>8,9%</td>
<td>ENVIRONMENT</td>
</tr>
</tbody>
</table>

**SOURCE:** Nomisma Italy2Invest

*Top 20 port cities for goods flows

**Top 20 port cities for people flows
The Top 3 domains determining Genoa’s attractiveness

**1. Real Estate market**
- Index of Intensity of Real Estate Market: Commercial, Tertiary and Residential sectors
- Prices of shops and houses

**2. Tourism**
- Exercises of accommodations for km²
- Total tourist arrivals for km²
- Foreign tourism incidence
- Index of gross utilisation of beds

**3. Services (allocations and expenditure)**
- Presence of Hospitals, schools, public offices, scientific labs for km²
- Average surface of non-residential stock
- Presence of Railway station in the municipality
- Presence of Airport, Port in the province
- Expenditure in social services
- Number of projects funded by the EU

*The main variables implemented in the analysis are indicated for each domain*
## Real Estate Market

### Genoa

**Weighted Average Prices for in Use Houses, Offices and Shops**

(€/sq.m.) 2011-2017

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td><strong>Semester</strong></td>
<td>I sem</td>
<td>II sem</td>
<td>I sem</td>
<td>II sem</td>
<td>I sem</td>
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<td>I sem</td>
<td>II sem</td>
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<td>II sem</td>
</tr>
<tr>
<td><strong>Houses</strong></td>
<td>€ 1,832</td>
<td>€ 1,786</td>
<td>€ 1,759</td>
<td>€ 1,719</td>
<td>€ 1,659</td>
<td>€ 1,626</td>
<td>€ 1,583</td>
<td>€ 1,566</td>
<td>€ 1,535</td>
<td>€ 1,505</td>
<td>€ 1,489</td>
<td>€ 1,472</td>
<td>€ 1,454</td>
<td>€ 1,436</td>
</tr>
<tr>
<td><strong>Offices</strong></td>
<td>€ 1,785</td>
<td>€ 1,748</td>
<td>€ 1,712</td>
<td>€ 1,676</td>
<td>€ 1,619</td>
<td>€ 1,577</td>
<td>€ 1,536</td>
<td>€ 1,521</td>
<td>€ 1,474</td>
<td>€ 1,453</td>
<td>€ 1,435</td>
<td>€ 1,418</td>
<td>€ 1,404</td>
<td>€ 1,388</td>
</tr>
<tr>
<td><strong>Shops</strong></td>
<td>€ 2,451</td>
<td>€ 2,435</td>
<td>€ 2,400</td>
<td>€ 2,343</td>
<td>€ 2,287</td>
<td>€ 2,237</td>
<td>€ 2,177</td>
<td>€ 2,133</td>
<td>€ 2,102</td>
<td>€ 2,077</td>
<td>€ 2,058</td>
<td>€ 2,029</td>
<td>€ 2,020</td>
<td>€ 1,995</td>
</tr>
</tbody>
</table>

**Weighted Average Rents for in Use Houses, Offices and Shops**

(€/sq.m./year) 2011-2017

<table>
<thead>
<tr>
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<td>I sem</td>
<td>II sem</td>
<td>I sem</td>
<td>II sem</td>
<td>I sem</td>
<td>II sem</td>
</tr>
<tr>
<td><strong>Houses</strong></td>
<td>€ 91</td>
<td>€ 88</td>
<td>€ 87</td>
<td>€ 86</td>
<td>€ 84</td>
<td>€ 83</td>
<td>€ 82</td>
<td>€ 80</td>
<td>€ 80</td>
<td>€ 79</td>
<td>€ 78</td>
<td>€ 78</td>
<td>€ 77</td>
<td>€ 77</td>
</tr>
<tr>
<td><strong>Offices</strong></td>
<td>€ 94</td>
<td>€ 93</td>
<td>€ 91</td>
<td>€ 90</td>
<td>€ 87</td>
<td>€ 85</td>
<td>€ 83</td>
<td>€ 82</td>
<td>€ 80</td>
<td>€ 79</td>
<td>€ 78</td>
<td>€ 77</td>
<td>€ 76</td>
<td>€ 76</td>
</tr>
<tr>
<td><strong>Shops</strong></td>
<td>€ 178</td>
<td>€ 178</td>
<td>€ 175</td>
<td>€ 172</td>
<td>€ 168</td>
<td>€ 166</td>
<td>€ 162</td>
<td>€ 159</td>
<td>€ 158</td>
<td>€ 155</td>
<td>€ 154</td>
<td>€ 152</td>
<td>€ 151</td>
<td>€ 151</td>
</tr>
</tbody>
</table>

**Number of Transactions in Residential, Tertiary Commercial Sectors**

2011-2017

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Residential</strong></td>
<td>7,076</td>
<td>7,173</td>
<td>4,664</td>
<td>5,339</td>
<td>5,448</td>
<td>6,617</td>
<td>6,838</td>
</tr>
<tr>
<td><strong>Tertiary</strong></td>
<td>171</td>
<td>127</td>
<td>131</td>
<td>98</td>
<td>95</td>
<td>138</td>
<td>180</td>
</tr>
<tr>
<td><strong>Commercial</strong></td>
<td>352</td>
<td>280</td>
<td>242</td>
<td>258</td>
<td>272</td>
<td>340</td>
<td>361</td>
</tr>
</tbody>
</table>

Source: Osservatorio Mercato Immobiliare, Nomisma
TOURISM

Tourism sector in the Municipality of Genoa

EXERCISES OF ACCOMMODATIONS FOR km²*

*Analysis for TOURIST CIRCUMSCRIPTION

territorial entity made up of 1 or more municipality, belonging to a tourist system which is homogeneous by characteristics of the accommodation offer and by request (prevalent travel motivation)

TOURIST REQUEST (2017 data)

ARRIVALS
879,092

FOREIGN TOURISM INCIDENCE*
51.2%

* Share of foreign arrivals on total arrivals

TOURIST PRESENCES
1,862,584

AVERAGE PERMANENCE*
2.12 nights

*TOURIST PRESENCES/Arrivals

TOURIST OFFER (2016 data)

# Exercises of Accommodations
360

108
HOTEL

252
COMPLEMENTARY

# Beds
10,815

SOURCE: Nomisma Italy2Invest

CONCENTRATION OF EXERCISES OF ACCOMMODATIONS

Low
Medium - low
Medium
Medium - high
High

GENOVA

hilltop locality

maritime locality

inland

other municipalities

Rivera del Ponente

Rivera del Porto

Cinque Terre

Coastal locality

land

APID di Genova - hilltop locality

APID di Genova - marine locality

APID di Genova - other municipalities

APID del Torno - hilltop locality

APID di Genova - other municipalities

APID di Genova - marine locality
SERVICES – Allocations and expenditure

INFRASTRUCTURE AND ACCESSIBILITY in the municipality of Genoa

- Main harbor hub of the northwest and one of the main harbors in the western Mediterranean
- Reference point for trade routes
- Equipped with an airport
- Ferryboat crossroads for international routes (France, Spain, North-Africa)

ACCESSIBILITY

‘Analysis for TOURIST CIRCUMSCRIPTION

territorial entity made up of 1 or more municipality, belonging to a tourist system which is homogeneous by characteristics of the accommodation offer and by request (prevalent travel motivation)

ACCESSIBILITY LEVEL

- Low
- Medium
- High
CONTACTS

Nomisma SpA
www.nomisma.it
www.italy2invest.it

+39 051 6483345

info@italy2invest.it