

ENIT BULLETIN

In-depth analysis of trends in tourism

Focus: Christmas - Epiphany

On 23 December 2022

By the

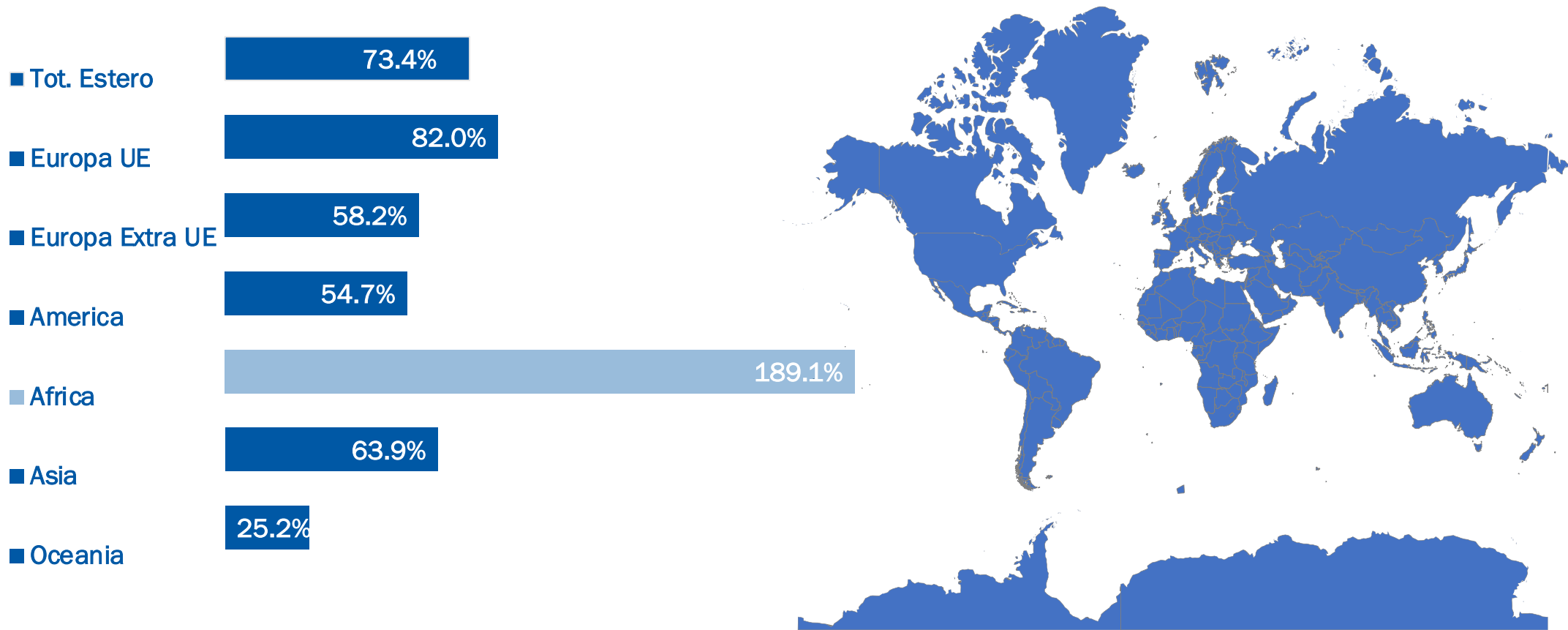
Research Department

ENIT - ITALIAN NATIONAL TOURIST BOARD



Recovery of Italy in international markets compared to 2019

International travellers in Italy: % recovery January-September 2022 against volume January-September 2019

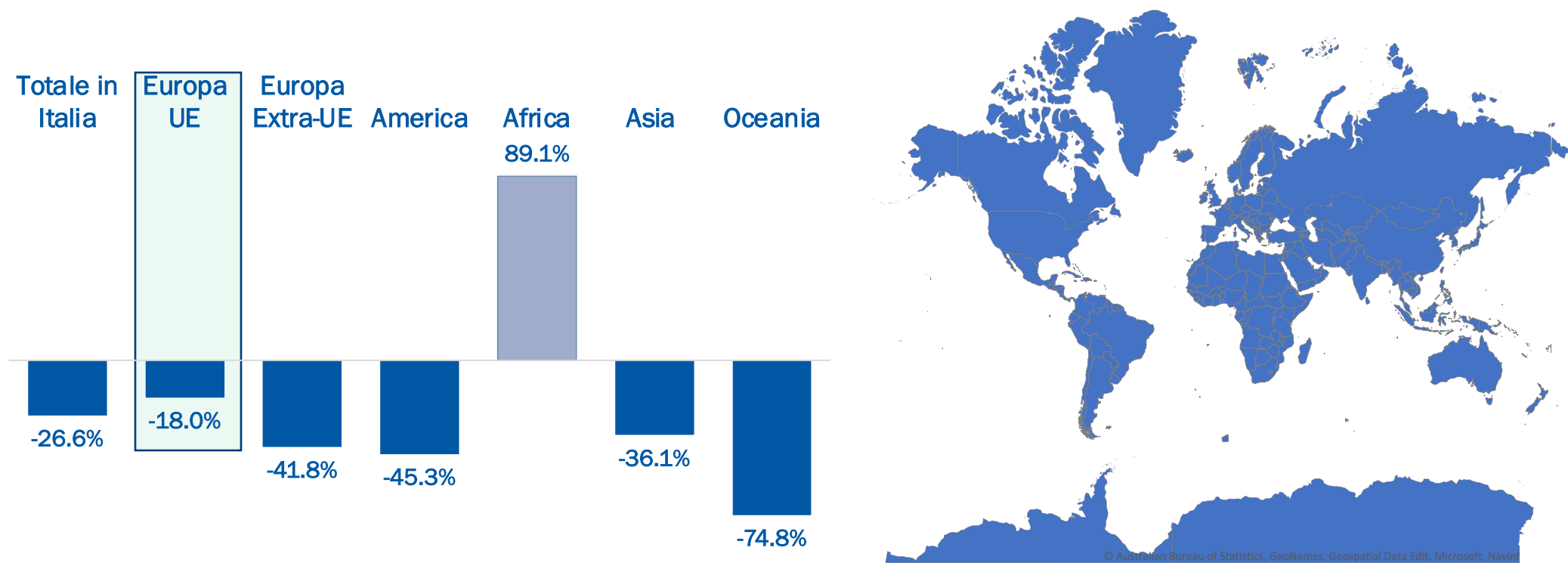


Between January and September 2022, the number of international travellers in Italy reached 73.4% of the 2019 volume.

Source: ENIT Research Department using provisional Bank of Italy data for 2022

Recovery of Italy in international markets compared to 2019

International travellers to Italy: % recovery January-September 2022 against January-September 2019

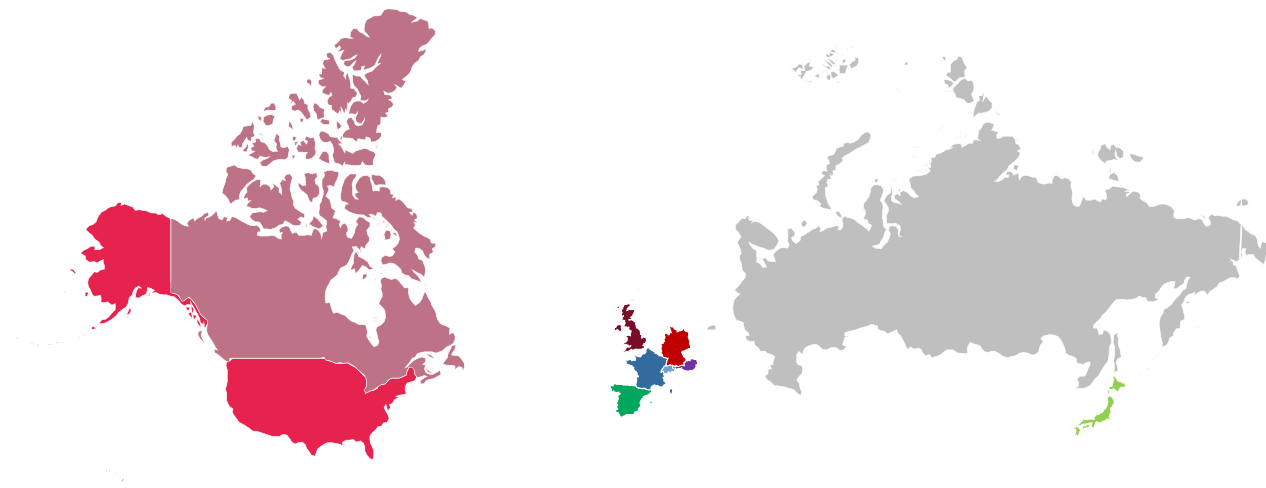
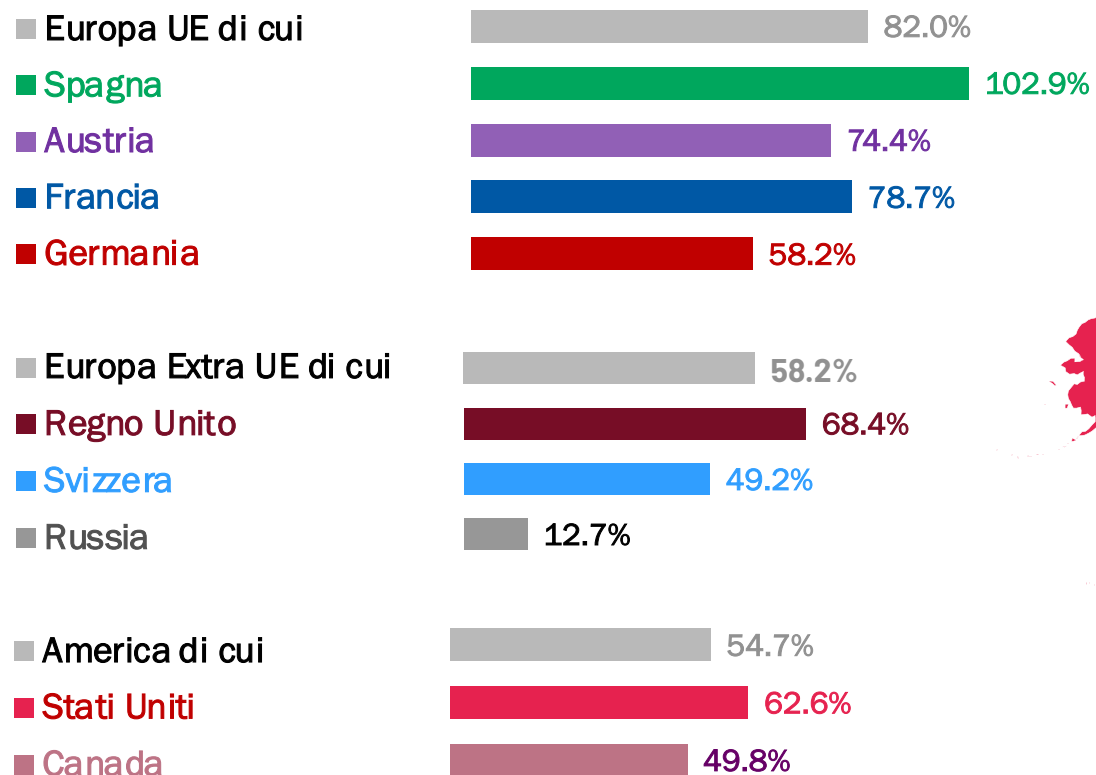


Between January and September 2022, the number of international travellers in Italy remained -26.6% below the 2019 figures. From the EU there was a smaller drop (-18.0%) compared to other geographic areas of origin and overall.

Source: ENIT Research Department using provisional Bank of Italy data for 2022

Recovery of Italy in international markets compared to 2019

International travellers to Italy: % recovery January-September 2022 against volume January-September 2019

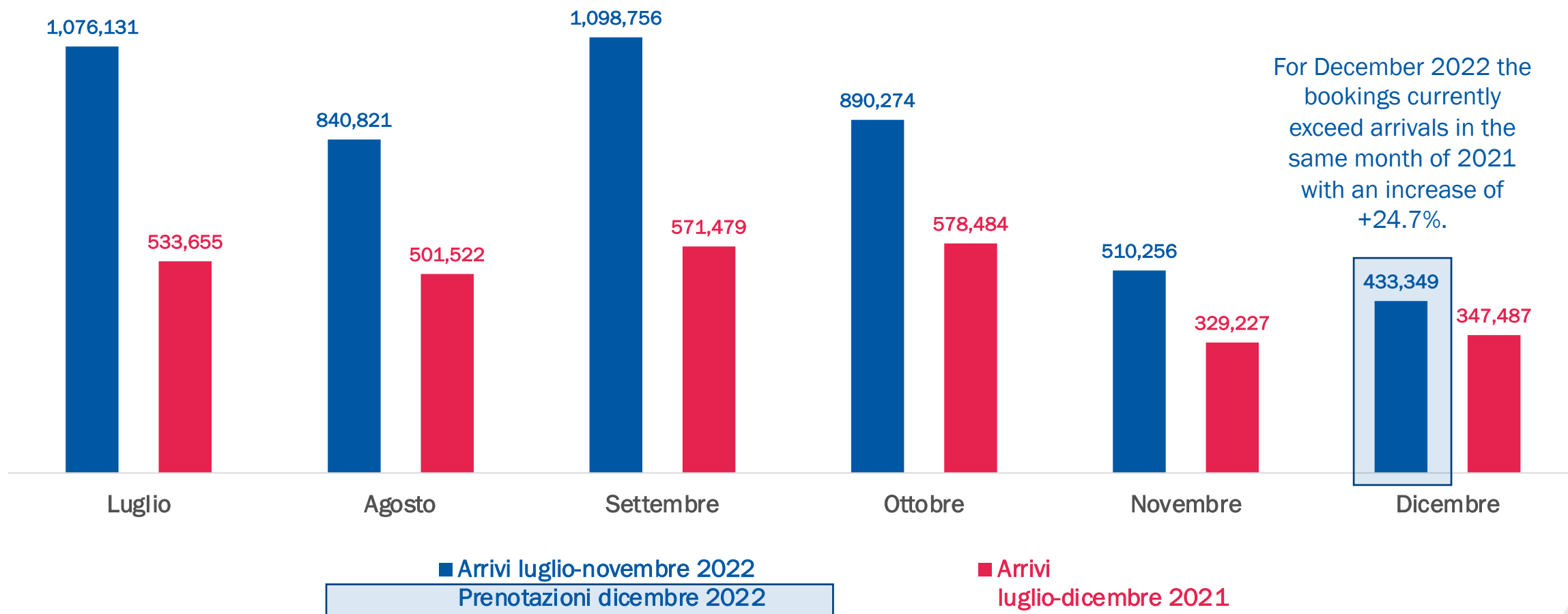


In the first 9 months of 2022, Spanish visitors to Italy were up about 3.0% compared to 2019, fully recovering the level of 3 years ago. Over the same period, Italy recovered 62.6% of visits from the USA and about 50.0% from Canada compared to 2019.

Source: ENIT Research Department using provisional Bank of Italy data for 2022

Monitoring of arrivals and international flight bookings to Italy

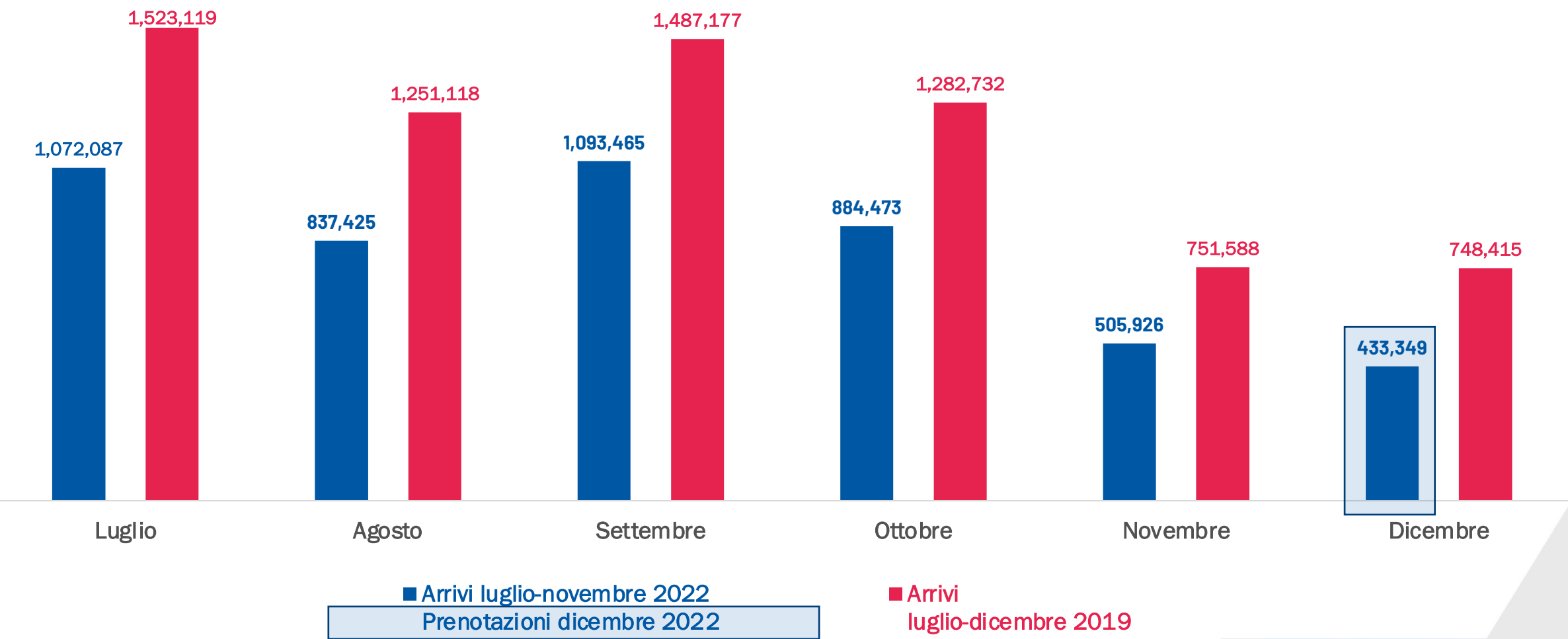
Past arrivals and bookings for the coming months in Italian airports – comparison between 2022 and 2021, on 23/12/22



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Monitoring of arrivals and international flight bookings to Italy

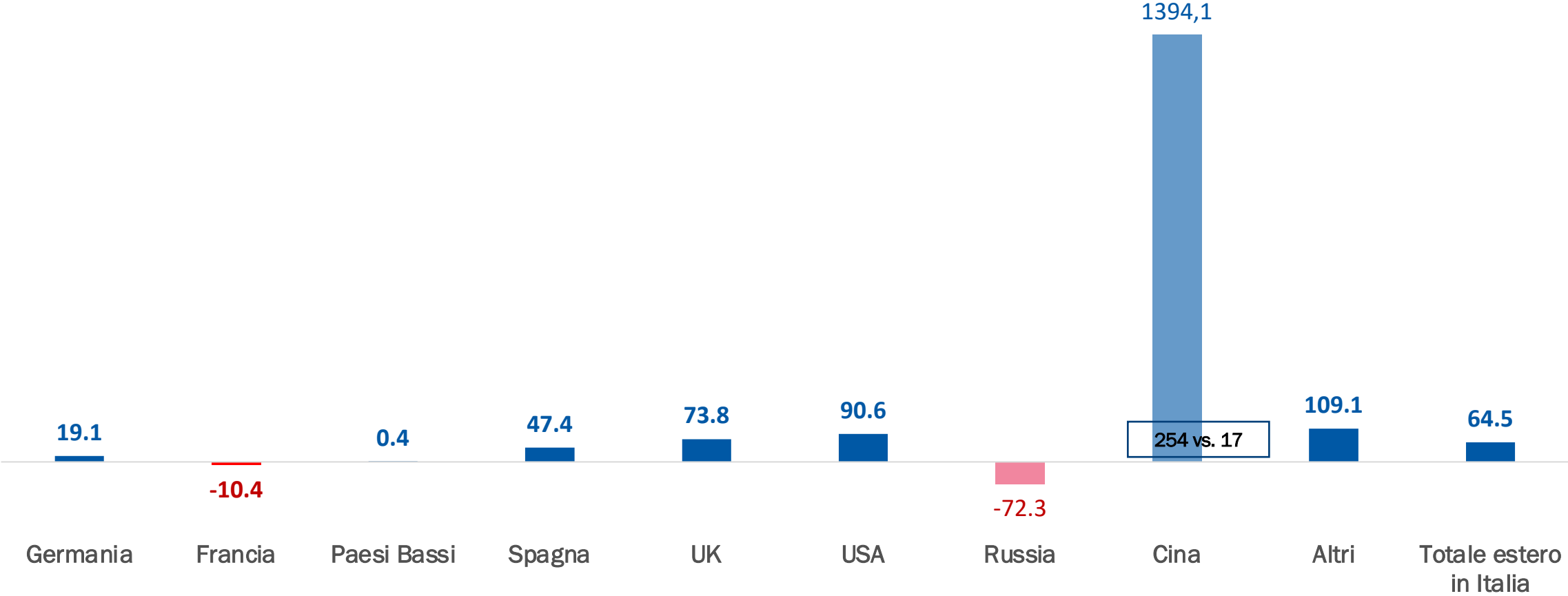
Past arrivals and bookings for the coming months in Italian airports – comparison between 2022 and 2019, on 23/12/2022



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Monitoring of international flight bookings to Italy - November

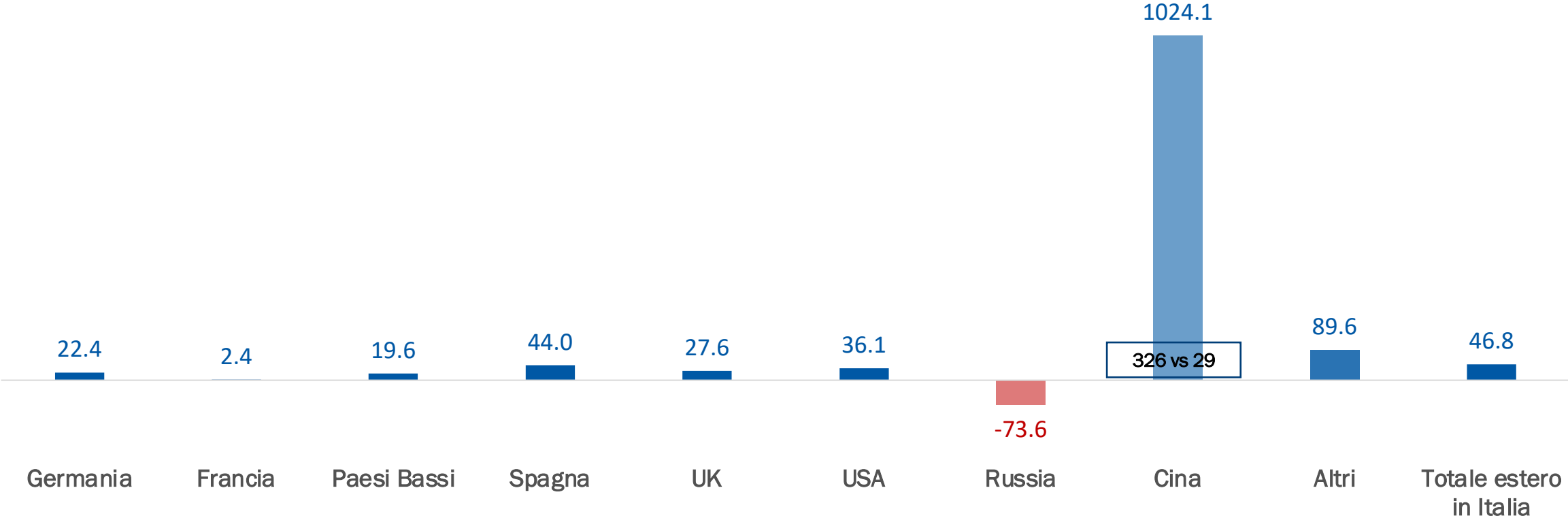
2022 Bookings by country of origin – % variation November 2022 against 2021, on 23/12/2022



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Monitoring of international flight bookings to Italy – December

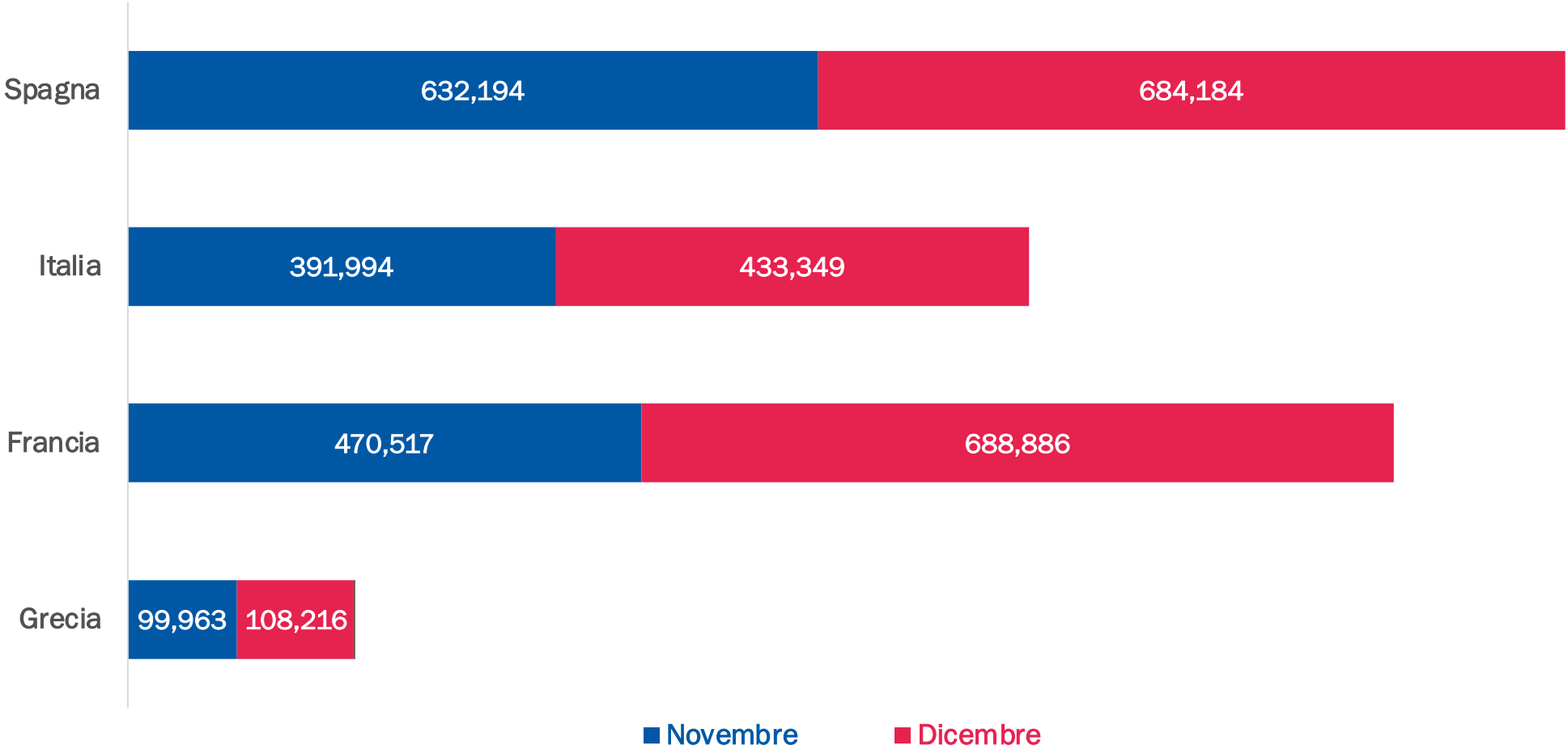
2022 Bookings by country of origin – % variation December 2022 against 2021, on 23/12/2022



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Monitoring of international flight bookings – Italy and competitors

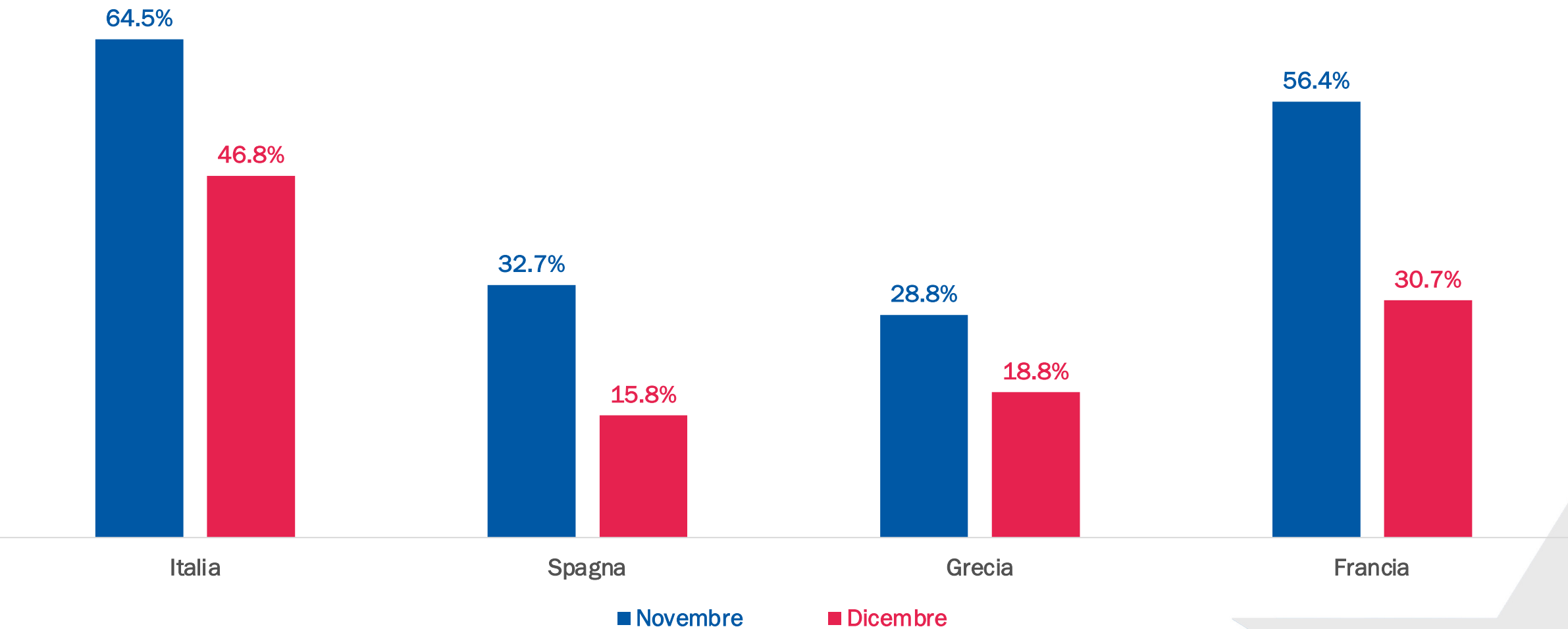
Bookings November and December 2022, on 23/12/2022



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Monitoring of international flight bookings – Italy and competitors

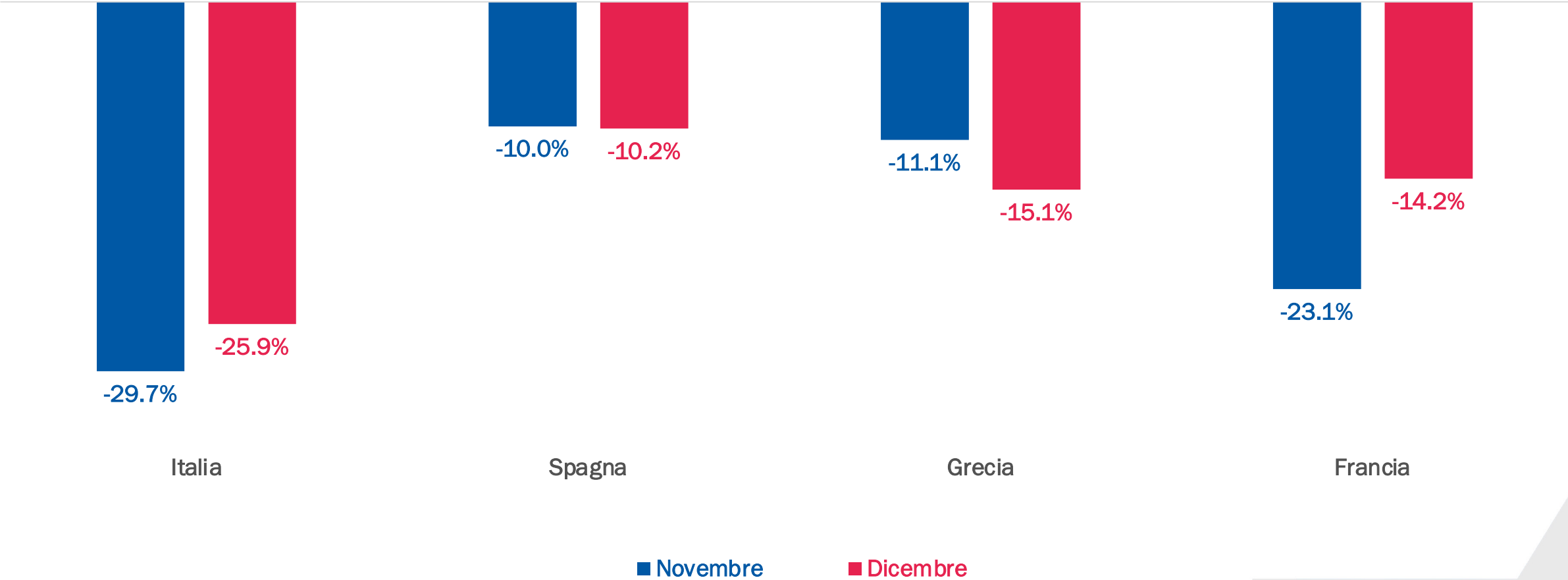
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Monitoring of international flight bookings – Italy and competitors

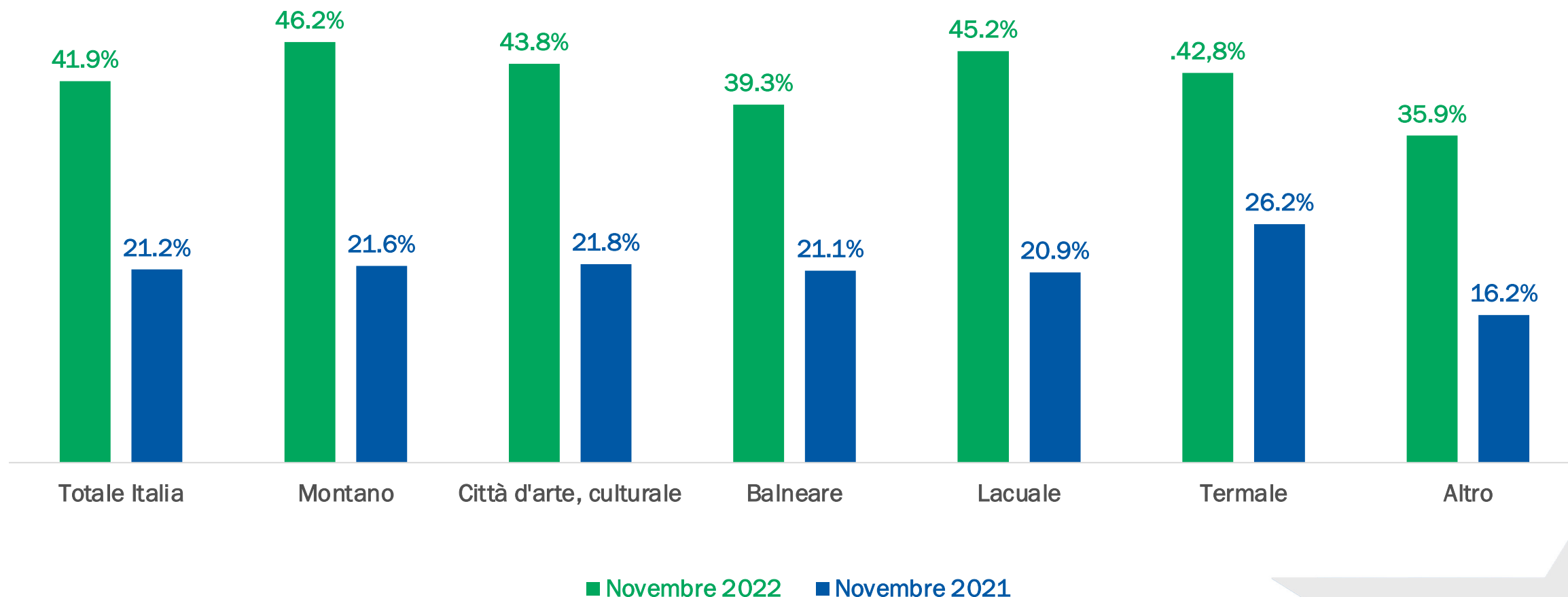
Bookings November and December 2022 – % variation against 2019, on 23/12/2022



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Accommodation bookings through Online Travel Agencies November 2022/2021

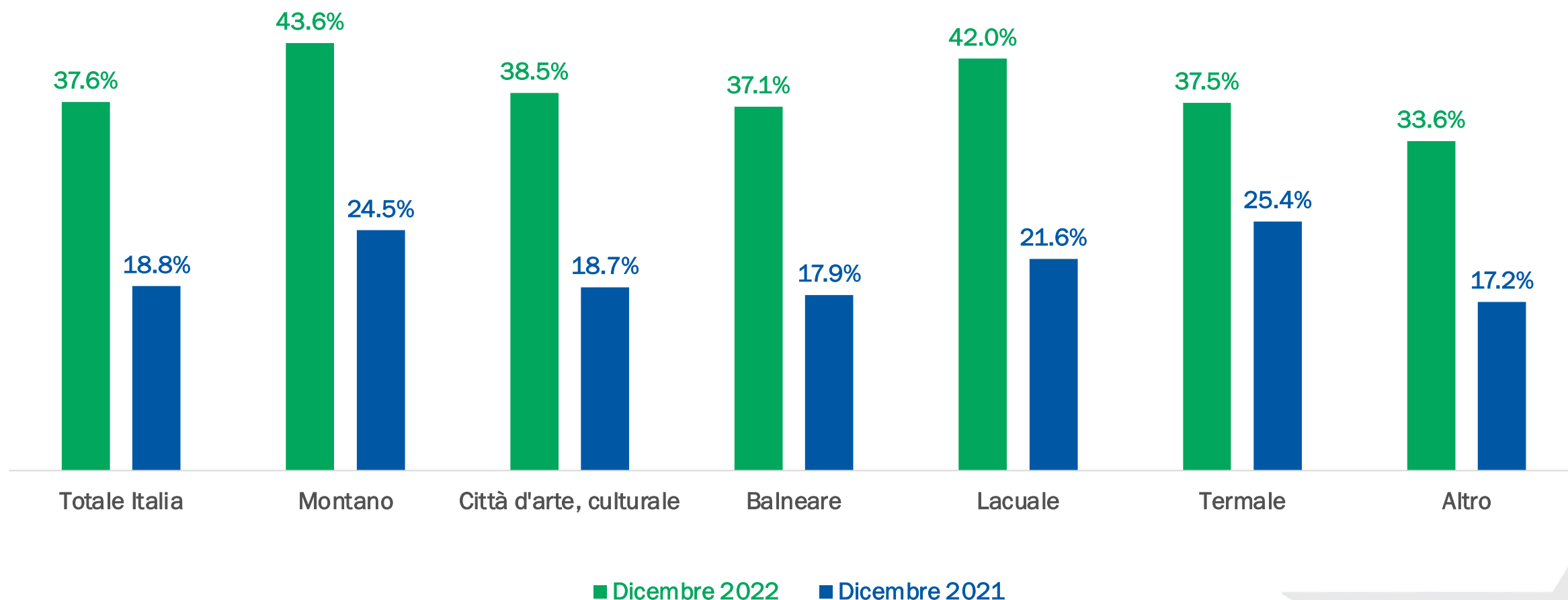
Available products among major OTAs – occupancy rates by product compared with 2021



Source: ENIT Research Department using The Data Appeal Company data, on 23/12/2022

Accommodation bookings through Online Travel Agencies December 2022/2021

Products available among major OTAs – occupancy rates by product compared with 2021



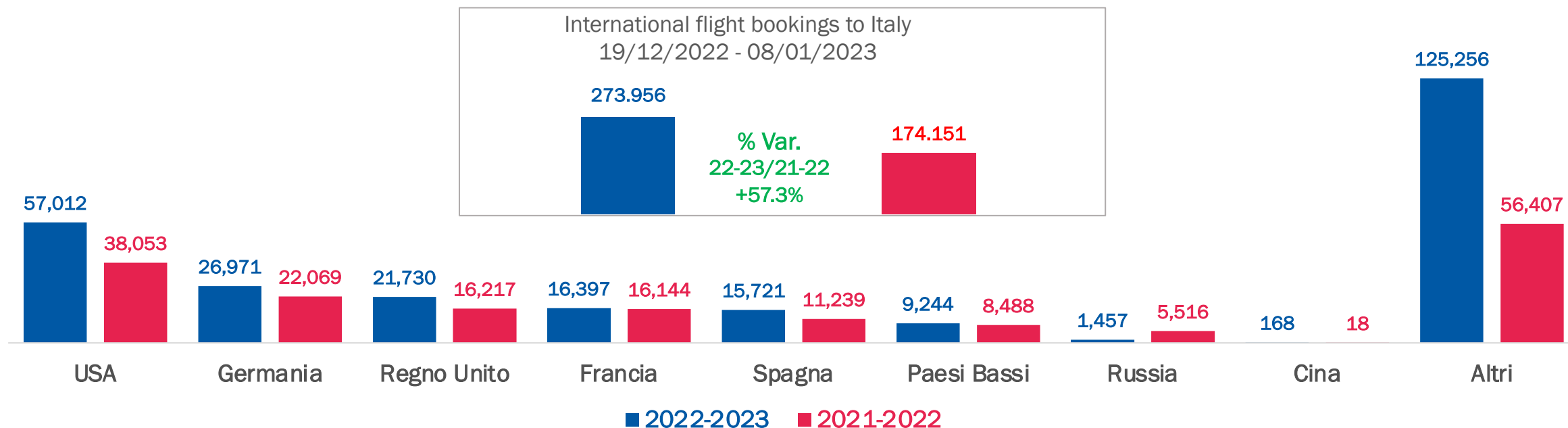
Source: ENIT Research Department using The Data Appeal Company data, on 23/12/2022

FOCUS

Christmas - Epiphany

Monitoring of international flight bookings to Italy Christmas -Epiphany

Bookings 2022-2023 by country of origin – comparison 2021-2022 on 23/12/2022



International flight bookings to Italy in the week before Christmas and over the weekend of the Epiphany are currently around 274,000 with an increase of +57.3% against the same period in 2021-2022.

There is ongoing strong USA market demand with Christmas holiday flight bookings from the USA already at 57,000, almost doubled compared to 2021-2022 (+49.8%) with a share of almost 21.0% of total expected foreign arrivals.

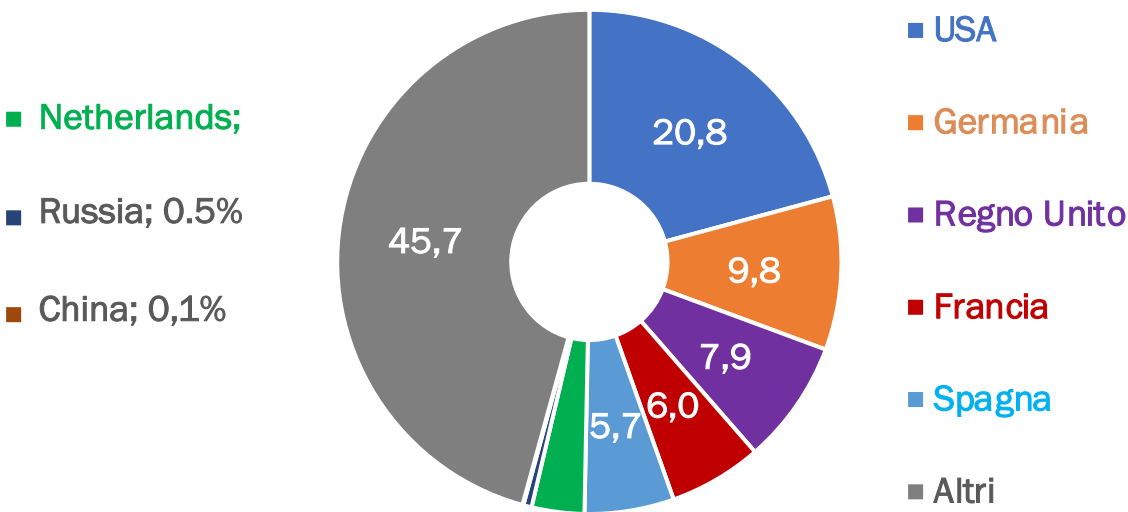
This is followed by bookings from Germany, 26,970 (+22.2%) and Great Britain, 21,730 (+34.0%), representing respectively 9.8% and 7.9% of the total.

Source: ENIT Research Department using Forward Data – updated to 11/12/2022

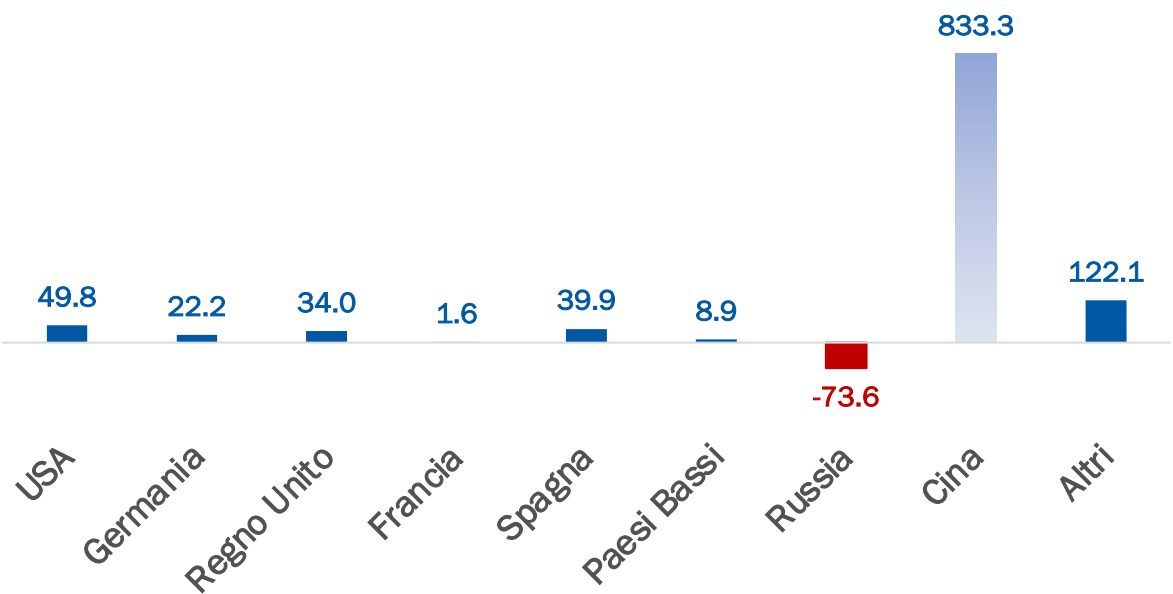
Monitoring of international flight bookings to Italy Christmas -Epiphany

2022-2023 bookings by country of origin – % share of total bookings and % var. against 2021/2022

Quota %



Var. %



Source: ENIT Research Department using Forward Data – updated to 11/12/2022

Monitoring of international flight bookings to Italy Christmas -Epiphany

2022-2023 bookings by destination – comparison, % share and % variation against 2021-2022 on 23/12/2022

International flight bookings to Italy 19/12/2022 - 08/01/2023				
Destination	2022-2023	2021-2022	% Share total 2022-2023	% Var. 2022-2023 against 2022-2021
Rome	122,339	67,154	44.7	82.2
Milan	74,050	45,457	27.0	62.9
Venice	24,721	18,984	9.0	30.2
Florence	12,426	9,541	4.5	30.2
Bologna	11,074	7,715	4.0	43.5
Naples	9,123	8,230	3.3	10.9
Turin	7,039	5,469	2.6	28.7
Catania	3,907	3,765	1.4	3.8
Verona	1,946	1,207	0.7	61.2
Bari	1,661	1,667	0.6	-0.4
Palermo	1,238	1,281	0.5	-3.4
Genoa	1,109	893	0.4	24.2
Pisa	1,025	819	0.4	25.2
Trieste	698	373	0.3	87.1
Ancona	680	541	0.2	25.7
Others	920	1,055	0.3	-12.8
Total	273,956	174,151	100.0	57.3

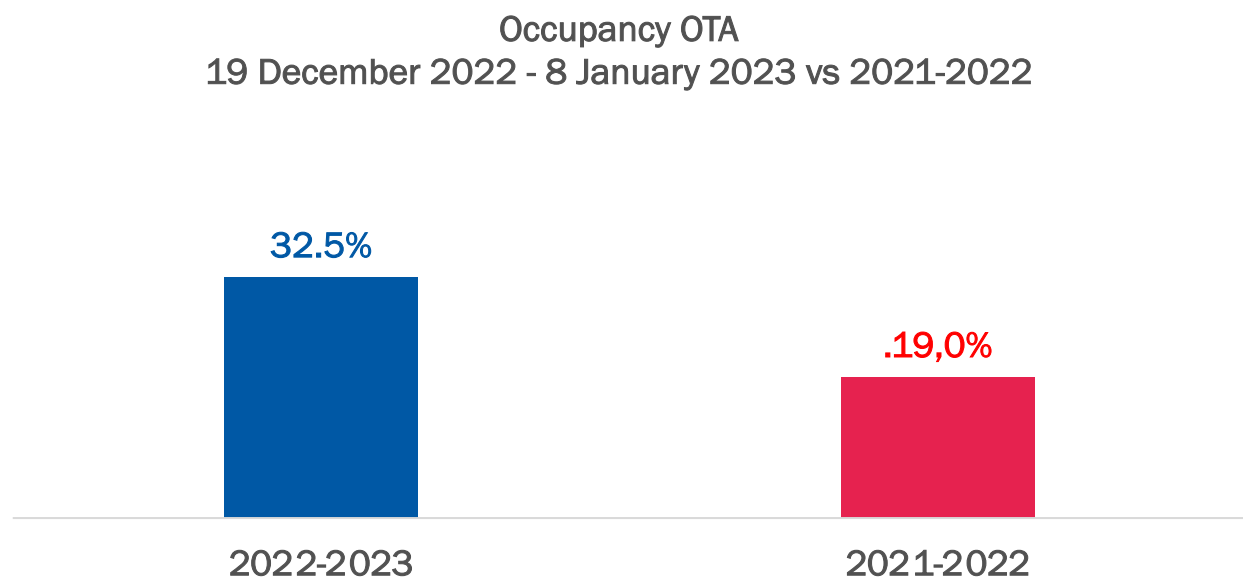
Of the top three destination cities, the best performer is Rome, which according to predictive data will host about 45.0% of total international visitors (+82.2%).

Next in the top 3 are Milan (+62.9%) with a share of international air arrivals of 27.0% and Venice, (+30.2%) with 9.0% of overall visitors.

Source: ENIT Research Department using ForwardKeys data – updated to 11/12/2022

Accommodation bookings through Online Travel Agencies Christmas-Epiphany

Available products among major OTAs – accommodation facility occupancy rates, comparison 2021-2022



Product	2022-2023	2021-2022
Mountains	44.0%	28.3%
Lakes	36.6%	22.6%
Cities of art/culture	32.8%	18.4%
Thermal Spas	35.1%	26.8%
Beach	31.4%	18.2%
Others	29.0%	18.1%
Total	32.5%	19.0%

From 19 December 2022 to 8 January 2023, bookings of rooms available in accommodation facilities through Online Travel Agencies are currently 32.5%, against 19.0% for the same period in 2021-2022.

For the entire period, all products exceed the national average, apart from beach resorts, considering the season, which were slightly lower (31.4%). In top position is the mountain category with 44.0% of available spaces booked.

Source: ENIT Research Department using The Data Appeal Company data, on 23/12/2022

Research and Study Department – ENIT Marketing and Promotion Management

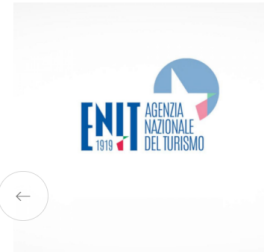
Market Research and Statistics - ENIT Marketing and Promotion Management

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Bollettino ENIT - Luglio Week 4



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Bollettino ENIT - Luglio Week 3

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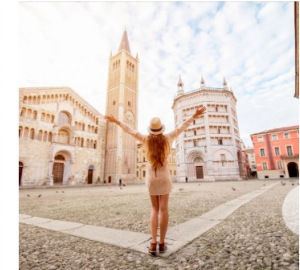
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