

In-depth analysis of tourism trends

Focus: Christmas – Epiphany

By the

ENIT Research Department

21 December 2022

Expected airport arrivals from abroad to Italy from 19 December 2022 to 8 January 2023 ¹

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 2021-2022.

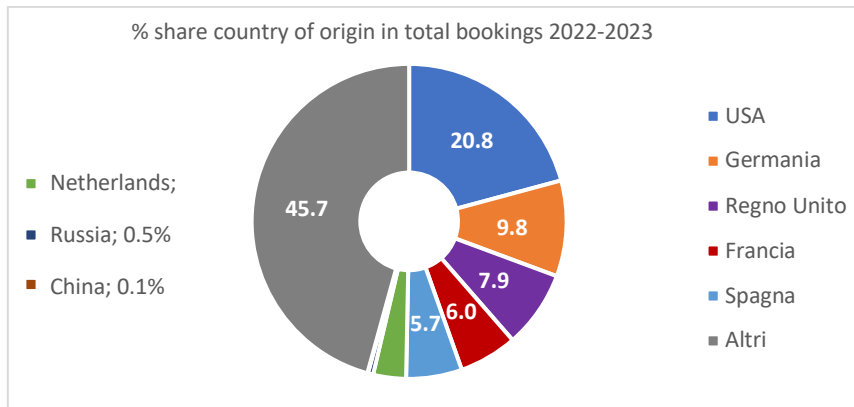
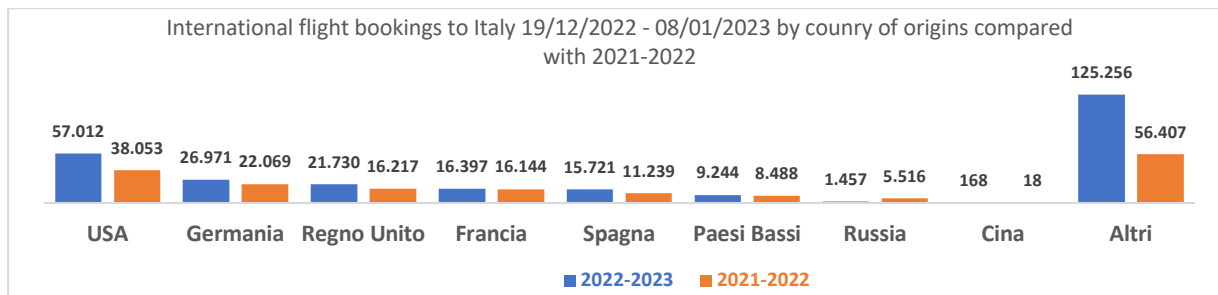


Source: ENIT Research Department using ForwardKeys data

1. Countries of origin

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 United Kingdom, 21,730 (+34.0%), representing respectively 9.8% and 7.9% of the total.



Source: ENIT Research Department using ForwardKeys data

¹ Bookings on 21 December – last update 11 December

2. Destinations

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% more than the same period in 2021-2022.

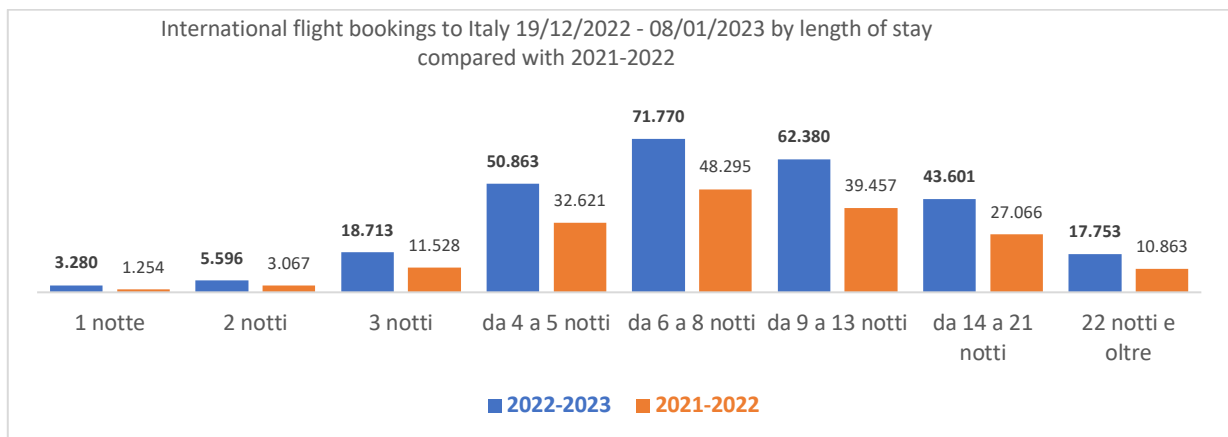
Next in the top 3 are Milan (+62.9%) with a share of 27.0% of international flight arrivals and Venice, (+30.2%) with 9.0% of overall bookings.

International flight bookings to Italy 19/12/2022 - 08/01/2023 by destination Comparison with 2021-2022 - % share of 2022-2023 total and % variation of 2022-2023 against 2021-2022				
Destination	2022-2023	2021-2022	% Share of 2022-2023 total	% Var. 2022-2023 against 2021-2022
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

Source: ENIT Research Department using ForwardKeys data

3. Length of stay

In the period under analysis, there are 71,770 flight bookings for visits to Italy of 6 to 8 nights (+48.6% against 2021), which amounts to 26.2% of overall visits from abroad, while about 62,400 (+58.1%), or 22.8%, are for an average stay of 9 to 13 nights.



Source: ENIT Research Department using ForwardKeys data

4. Passenger profile

Almost all bookings, over 224,500 (+50.5% against 2021-2022) are for leisure travel, 82.0% of the total, while 9.0% were for groups with 24,500 bookings (+128.9%).

International flight bookings to Italy 19/12/2022 - 08/01/2023 by traveller profile
Comparison with 2021/2022 - % share of 2022-2023 total and % variation of 2022-2023 against 2021-2022

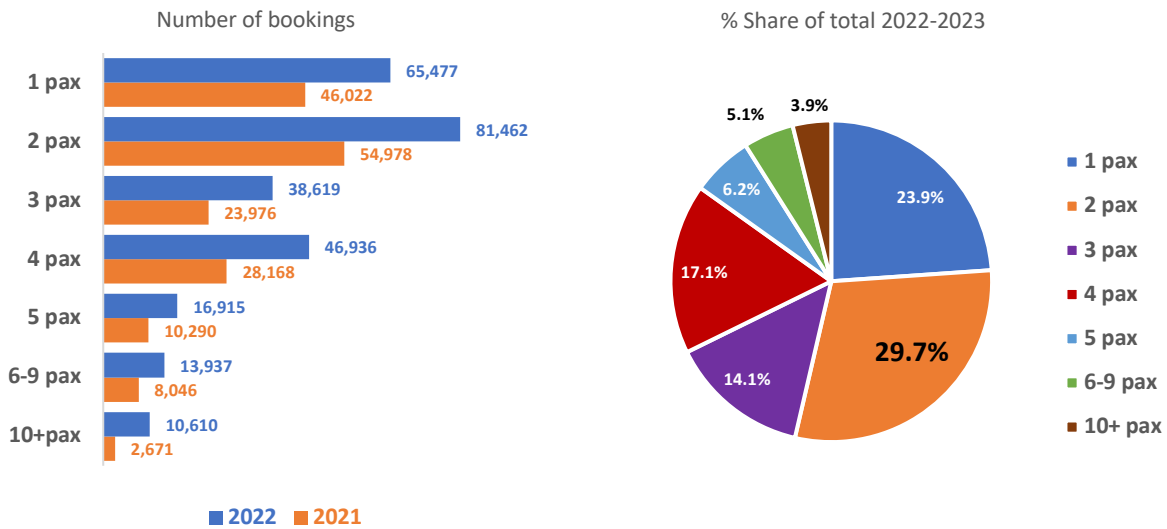
Traveller profile	2022/2023	2021/2022	% Var. 2022-2023/2021-2022	% Share of total 2022-2023
Leisure	224,558	149,210	50.5	82.0
Groups	24,541	10,722	128.9	9.0
Other	14,220	9,313	52.7	5.2
Business	10,637	4,906	116.8	3.9
Total	273,956	174,151	57.3	100.0

Source: ENIT Research Department using ForwardKeys data

5. Passengers per booking

Flights to Italy are booked mainly by couples: to date there are 81,462 bookings for 2 passengers (+48.2% against 2021), 29.7% of the total.

International flight bookings to Italy 19/12/2022 - 08/01/2023 passengers per booking
Comparison with 2021/2022 and % share of 2022-2023 total



Source: ENIT Research Department using ForwardKeys data

6. Booking class

International tourists travel mainly in economy class: about 234,000 scheduled airport arrivals in Italy (+59.2%), 85.4% of the total. This is followed by premium class (+47.7%; 7.5%), on the upswing, confirming the propensity for travellers to spend more not only for the flight but also for all tourist services during the visit, to the benefit of the selected destinations.

Low demand for first class which, by the way, decreased by more than half compared to last year (-53.8%).

International flight bookings to Italy 19/12/2022 - 08/01/2023 by cabin
Comparison with 2021-2022 and % share of 2022-2023 total

	Economy	Economy Premium	Business	First
2022-2023	233,959	20,623	18,811	563
2021-2022	146,943	13,960	12,029	1,219
% Share of 2022-2023 total	85.4	7.5	6.9	0.2
% Var. 2022-2023/2021-2022	59.2	47.7	56.4	-53.8

Source: ENIT Research Department using ForwardKeys data

7. Distribution channels

Flight bookings are most commonly made directly with the airline: 157,460 bookings in this period with a 57.5% share of the total, increased by +33.0%. This is followed by use of traditional travel agencies with 62,000 bookings (+121.9%; 22.6% of the total)

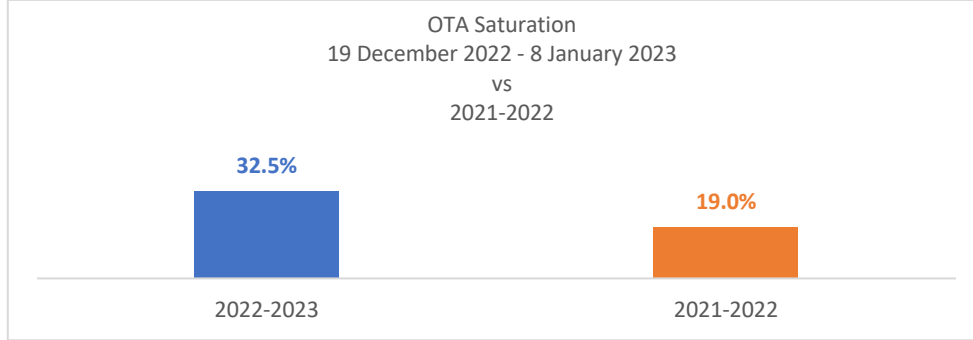
International flight bookings to Italy 19/12/2022 - 08/01/2023 by distribution channel
Comparison with 2021-2022 - % share of 2022-2023 total and % variation of 2022-2023 against 2021-2022

Distribution channels	2022-2023	2021-2022	% Var. 2022-2023/2021-2022	% Share of total 2022-2023
Airline	157,463	117,685	33.8	57.5
Retail TA	62,045	27,964	121.9	22.6
Online TA	33,361	19,866	67.9	12.2
Other TA	10,701	4,414	142.4	3.9
Corporate TA	10,386	4,222	146.0	3.8
Total	273,956	174,151	57.3	100.0

Source: ENIT Research Department using ForwardKeys data

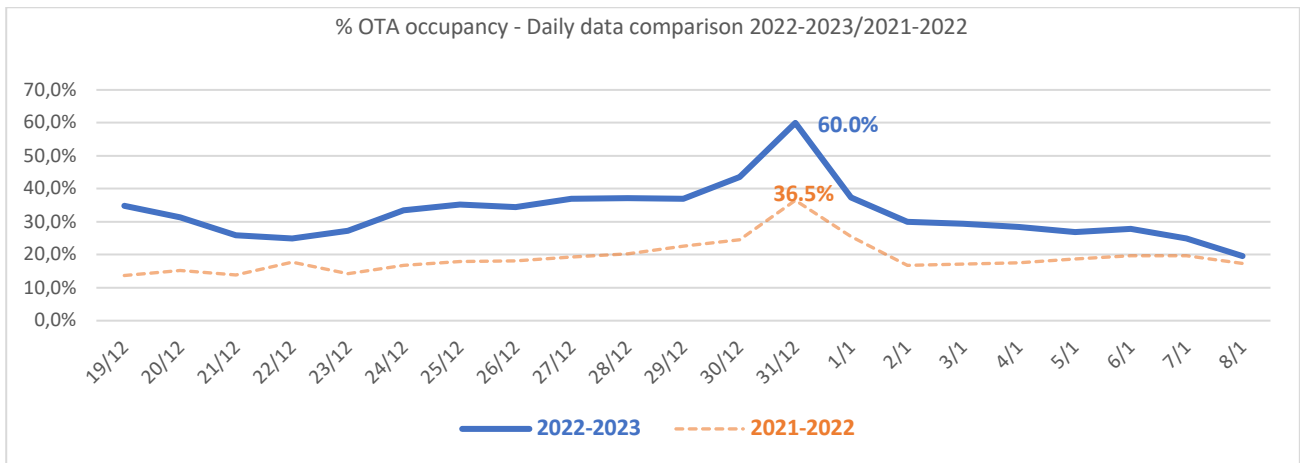
Accommodation bookings through Online Travel Agencies from 19 December 2022 to 8 January 2023 ²

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.



Source: ENIT Research Department using The Data Appeal data

An analysis of daily data reveals a maximum occupation level for the last day of the year when it reaches 60%, almost double compared to the occupancy rate over the Christmas holidays in 2021-2022 which remains at 36.5%.



Source: ENIT Research Department using The Data Appeal data

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.

Occupancy of available accommodation on OTA channels from 19/12/2022 to 08/01/2023 compared with 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%
Other	29.0%	18.1%
Total	32.5%	19.0%

Source: ENIT Research Department using The Data Appeal data

² Bookings on 21 December

The peak was reached at New Year's, especially in mountain (79.5%) and lake resort (69.1%) categories. Compared with the 2021 figures, the best performance was achieved by cities of art and culture, with an average rate of occupancy up by 25%.

Occupancy of available accommodation on OTA channels
from 19/12/2022 to 08/01/2023 compared with 2021-2022

Product	31/01/2022	31/01/2021
Mountains	79.5%	59.0%
Lakes	69.1%	51.5%
Cities of art/culture	61.3%	36.2%
Thermal Spas	63.2%	57.4%
Beach	56.4%	35.8%
Others	55.4%	31.2%
Total	60.0%	36.5%

Source: ENIT Research Department using The Data Appeal data