

In-depth analysis of tourism trends

Focus: Immaculate Conception Long Weekend

By the

ENIT Research Department

5 December 2022

Immaculate Conception Long Weekend 2022

Accommodation bookings through Online Travel Agencies from 7 to 11 December

Availability among major OTAs – accommodation occupancy rates, comparison 2021-2022

For the week from 5 to 12 December, bookings for available rooms in accommodation through Online Travel Agencies are currently 35.0%, against 19.6% for the same period in 2021.

An analysis of daily data reveals the highest values for 8, 9, and 10 December when the respective occupancy rates are 43.8%, 50.2%, and 44.9% against 14.6%, 16.7%, and 19.7% in 2021.

The mountain category is the most popular, on the same days going well above the national average with 62.4%, 68.9%, and 60.0% of available accommodation booked.

Good performance is also noted for lakes (8 December 47.4%; 9 December 52.4%; 10 December 49.8%), cultural (48.3%; 56.1%; 47.8%), and thermal spa products (51.6%; 53.1%; 46.4%).

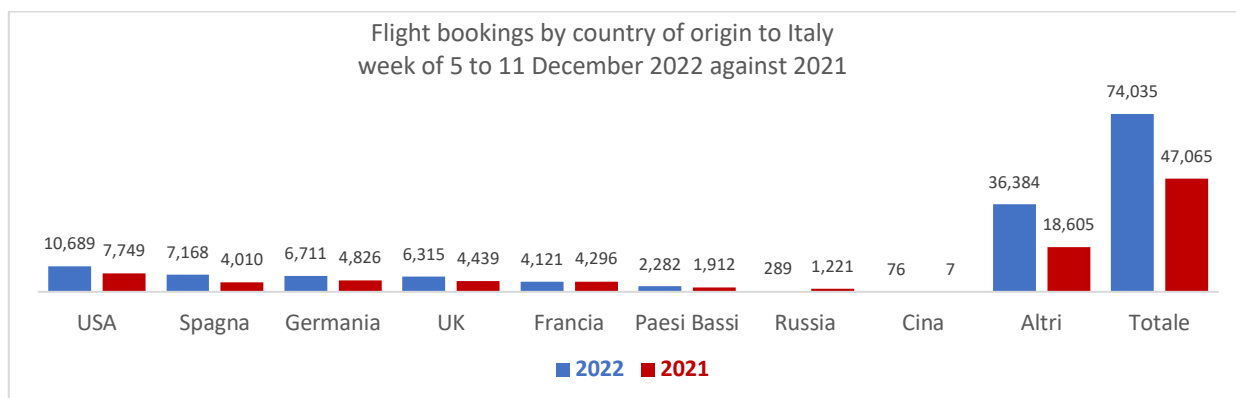
% Occupancy of available accommodation on OTA channels by product on 05/12/2022 from 7 to 11 December 2022 - compared to 2021										
Date of Product	07/12/22	07/12/21	08/12/22	08/12/21	09/12/22	09/12/21	10/12/22	10/12/21	11/12/22	11/12/21
Mountains	38.3%	30.7%	62.4%	23.2%	68.9%	23.9%	60.0%	28.0%	27.0%	34.0%
Lakes	36.2%	18.2%	47.4%	14.4%	52.4%	17.0%	49.8%	21.9%	32.2%	24.6%
Cultural	30.1%	16.6%	48.3%	14.0%	56.1%	16.1%	47.8%	20.1%	23.0%	24.2%
Thermal Spas	36.4%	23.0%	51.6%	19.5%	53.1%	22.6%	46.4%	26.3%	29.2%	39.1%
Beach	29.4%	15.7%	35.6%	15.4%	39.8%	16.8%	39.0%	17.2%	26.9%	19.9%
Other	21.9%	11.8%	28.7%	13.3%	34.2%	15.7%	35.3%	15.8%	20.1%	22.0%
Total	29.6%	16.7%	43.8%	14.6%	50.2%	16.7%	44.9%	19.7%	23.7%	24.0%

Source: ENIT Research Department using The Data Appeal Company data

Monitoring of international flight bookings to Italy – the week from 5 to 11 December 2022

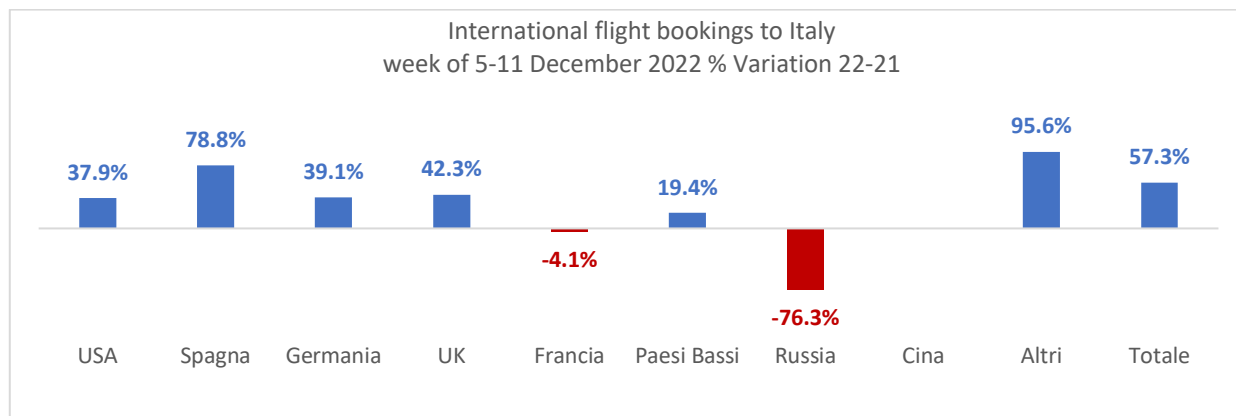
Overall, in the week from 5 to 11 December international flight bookings to Italy totalled 74,035, an increase of +57.3% against the same period in 2021.

As regards specific countries of origin, the main driving force in airport arrivals came from the United States (10,689; +37.9% against 2021), and Spain which exhibited the highest growth relative to the same week in 2021 (7,168; +78.8%). There was a slight decline from France, which is currently down by -4.1%



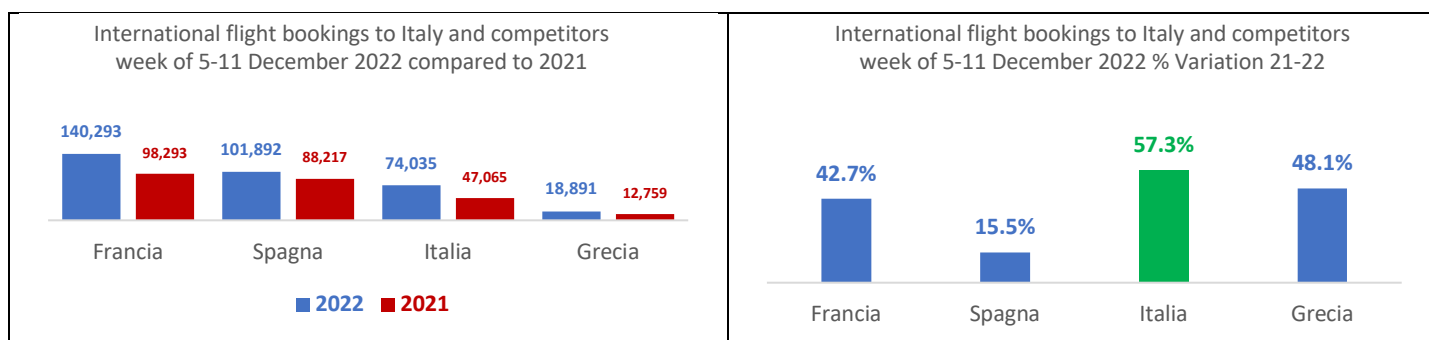
Source: ENIT Research Department using ForwardKeys data – updated to 30/11

Immaculate Conception Long Weekend 2022



Source: ENIT Research Department using ForwardKeys data – updated to 30/11

For this long weekend, bookings to Italy fall short of those for the competitors Spain and France. Nevertheless, the rate of growth for Italy, +57.3% in the week of 5-11 December 2022 against 2021, are significantly better compared to Spain (+15.5%), and at least 10 percentage points more than France (+42.7%) and Greece (+48.1%).



Source: ENIT Research Department using ForwardKeys data – updated to 30/11

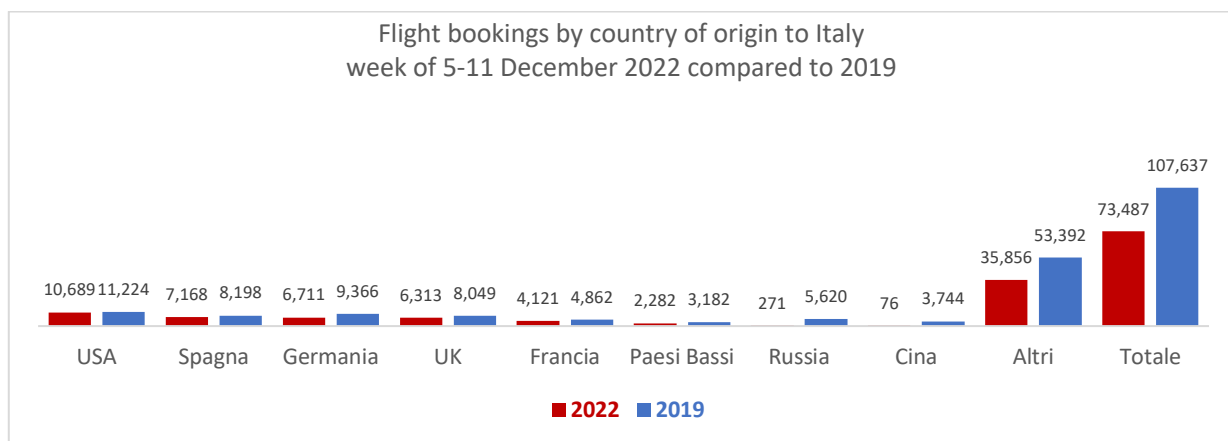
In net volumes, bookings are up more than 100% to Verona (+141.7%), Turin (+131.3%), and Palermo (+121.1%). These are followed by Rome (+89.2%) and Trieste (+73.3%).

Destination	Rome	Milan	Venice	Bologna	Florence	Naples	Turin	Catania	Verona	Pisa	Palermo	Genoa	Bari	Trieste	Ancona	Others
2022	32,616	19,767	7,303	3,665	3,635	2,259	2,172	598	498	288	283	283	239	201	147	81
2021	17,239	13,848	5,867	2,388	2,944	1,965	939	524	206	194	128	187	326	116	103	91
% Var.	89.2	42.7	24.5	53.5	23.5	15.0	131.3	14.1	141.7	48.5	121.1	51.3	-26.7	73.3	42.7	-11.0

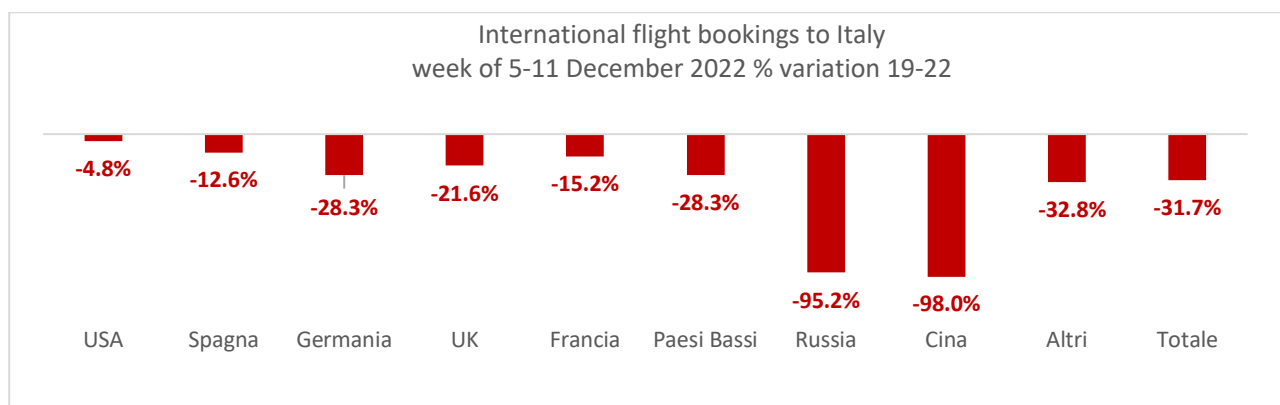
Source: ENIT Research Department using ForwardKeys data – updated to 30/11

Compared with 2019, overall flight bookings to Italy for the week including the long weekend of the Immaculate Conception remain down by -31.7%. However, there is a much smaller gap for bookings from the USA, with -4.8% against the same week of 5-11 December 2019, much less than other markets of origin and total international flights to Italy.

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Source: ENIT Research Department using ForwardKeys data – updated to 30/11



Source: ENIT Research Department using ForwardKeys data – updated to 30/11