

# THE ITALIAN TOURISM TREND IS POSITIVE



There are several considerations that can stimulate the data collected by the Astoi Confindustria Viaggi Observatory, the company that represents over 90% of the Italian tour operating market regarding the trend of winter holidays and end-of-the-year festivities.

The Italian tourism industry trend is positive, the organized tourism regains consensus and meets the travelers' needs, **who are more attentive to protection, by requesting greater assistance in the pre, during and post-trip phases and stipulating more supplementary insurance.**

In 2022 foreign travelers to Italy practically doubled (+94%) with a decisive recovery in Italian tourism, even if arrivals remain 26% lower than in 2019, the year before the pandemic. This is what emerges from Bank of Italy data in the first nine months of the year in which 55.98 million travelers arrived from abroad.

Bookings of organized trips for Christmas, New Year's Eve and Epiphany departures are approaching the numbers of 2019, or rather, prior to the two years of blockage in the sector: there is a -4% of global turnover against a 12% drop in passengers.

The discrepancy between turnover and passengers should be read in the context of inflation which is affecting all production factors and therefore also tourism. The high prices, the lower availability of flights for some destinations, the closure of some destinations such as China and Russia and a feeling of general uncertainty, further slowdown the balance of volumes in 2019.

The attitude towards the end of winter is different; while for the end-of-year holiday period everything was blocked in advance, for the rest of the winter, the Italians are more cautious and wait before confirming reservations.

The buying power is changeable and there is a clear polarization: the high spending range is not affected by inflation which, on the contrary, penalizes mostly the middle range, inducing consumers to change their behavior.

Customer demand is more weighted: they prefer shorter holidays (average 8 days), less expensive hotel services and medium-range destinations over long-range ones. The average expenses per person for the end of the year holidays are over 1.800 euros considering the high incidence of long-haul flights and the weight of departures in the high season.

"We confirm that the desire to travel is still very strong, which is good news for Italian tourism. The year-end holidays confirm that volumes are back to normal although not yet fully aligned with the 2019 values and we record a 4% decrease in overall turnover on the same 2019 perimeter," comments Pier Ezhaya, president of Astoi Confindustria Viaggi. For the rest of the winter, bookings appear to be slower, but as the season is still ongoing, the number of customers is likely to be very close to the pre-pandemic one.

"Inflation and high prices do not move away travelers but, in some cases, they lead to a change in some travel behaviors. The effect on the high-spending bracket is minimal, while it affects the middle bracket and families, making it more prudent. Customers prefer the Maldives, and Egypt as

destinations, with the return of cultural travel such as cruises on the Nile, and the Red Sea, as well as the United States, East Africa and Thailand. We are optimistic about the new season; the feeling regards the abandonment of the consequences of the pandemic with the desire to deploy all the energy, innovations, professionalism and guarantees in order to attract consumers to the model of Organized Tourism.”

The Observatory analyzed its audience, represented by the age group between 35 and 60 years, with the aim to draw a map of the destinations that are rising or falling in popularity. **The most sought-after long-range destinations for Italians are the Maldives, the United States (especially New York and Miami) and Thailand.** In the Caribbean, the preference goes to the Dominican Republic, and in East Africa to Kenya and Zanzibar; on the other hand, Latin America, Cuba, Mexico and Australia suffer.

The cruise sector closes in 2022 in a more favorable way than expected. The Caribbean remains one of the most popular destinations in the winter season and there is an important growth trend towards the United Arab Emirates. Young people and those who experience a board travel for the first time approach the cruise holiday. With the early booking, the Mediterranean will certainly profit in 2023.

**Nationally, mountain resorts are very popular among domestic travelers.** Here there is a change in the consumers’ attitude too: while previously the dominant motive was skiing, today other experiences are also sought after that complete the ski holiday, including wellness and enogastronomy.

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