

Travel in Italy

September 2023

Table of Contents

EXECUTIVE SUMMARY

Travel in 2023

Airlines: Key trends

Hotels: Key trends

Booking: Key trends

What next for travel?

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2018-2023

Table 2 - Surface Travel Modes Online Sales: Value 2018-2023

Table 3 - Forecast Surface Travel Modes Sales: Value 2023-2028

Table 4 - Forecast Surface Travel Modes Online Sales: Value 2023-2028

Table 5 - In-Destination Spending: Value 2018-2023

Table 6 - Forecast In-Destination Spending: Value 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Tourism Flows in Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism flows continue to see a strong recovery in 2023

Responsible tourism a growing influence on market demand

PROSPECTS AND OPPORTUNITIES

Positive outlook for tourism flows in Italy

New strategies being rolled out to reduce over-tourism

CATEGORY DATA

Table 7 - Inbound Arrivals: Number of Trips 2018-2023

Table 8 - Inbound Arrivals by Country: Number of Trips 2018-2023

Table 9 - Inbound City Arrivals 2018-2023

Table 10 - Inbound Tourism Spending: Value 2018-2023

Table 11 - Forecast Inbound Arrivals: Number of Trips 2023-2028

Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2023-2028

Table 13 - Forecast Inbound Tourism Spending: Value 2023-2028

Table 14 - Domestic Trips by Destination: Number of Trips 2018-2023

Table 15 - Domestic Spending: Value 2018-2023

Table 16 - Forecast Domestic Trips by Destination: Number of Trips 2023-2028

Table 17 - Forecast Domestic Spending: Value 2023-2028

Table 18 - Outbound Departures: Number of Trips 2018-2023

Table 19 - Outbound Departures by Destination: Number of Trips 2018-2023

Table 20 - Outbound Tourism Spending: Value 2018-2023

Table 21 - Forecast Outbound Departures: Number of Trips 2023-2028

Table 22 - Forecast Outbound Departures by Destination: Number of Trips 2023-2028

Table 23 - Forecast Outbound Spending: Value 2023-2028

[Airlines in Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Airlines seeing strong recovery but with one eye on the future with investments in new innovations and a wider presence
Tickets are increasingly expensive

PROSPECTS AND OPPORTUNITIES

Expansion of Venice airport

New regulation likely to impact flight prices while ITA Airways is projected to benefit from its status as the country's new flag carrier airline

CATEGORY DATA

Table 24 - Airlines Sales: Value 2018-2023

Table 25 - Airlines Online Sales: Value 2018-2023

Table 26 - Airlines: Passengers Carried 2018-2023

Table 27 - Airlines NBO Company Shares: % Value 2018-2022

Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2023

Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2023

Table 30 - Full Service Carriers Brands by Key Performance Indicators 2023

Table 31 - Forecast Airlines Sales: Value 2023-2028

Table 32 - Forecast Airlines Online Sales: Value 2023-2028

[Lodging \(Destination\) in Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hotels seeing strong growth in Italy in 2023 but challenges remain for some operators

BWH Hotel Group looking to capitalise on the growing interest in working vacations

PROSPECTS AND OPPORTUNITIES

Operators will need to respond to the changing needs of modern travellers with one eye on sustainability

Positive performance expected over the forecast period despite economic pressures

CATEGORY DATA

Table 33 - Lodging (Destination) Sales: Value 2018-2023

Table 34 - Lodging (Destination) Online Sales: Value 2018-2023

Table 35 - Hotels Sales: Value 2018-2023

Table 36 - Hotels Online Sales: Value 2018-2023

Table 37 - Other Lodging Sales: Value 2018-2023

Table 38 - Other Lodging Online Sales: Value 2018-2023

Table 39 - Lodging (Destination) Outlets: Units 2018-2023

Table 40 - Lodging (Destination) Rooms: Number of Rooms 2018-2023

Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2018-2023

Table 42 - Hotels NBO Company Shares: % Value 2018-2022

Table 43 - Hotel Brands by Key Performance Indicators 2023

Table 44 - Forecast Lodging (Destination) Sales: Value 2023-2028

Table 45 - Forecast Lodging (Destination) Online Sales: Value 2023-2028

Table 46 - Forecast Hotels Sales: Value 2023-2028

Table 47 - Forecast Hotels Online Sales: Value 2023-2028

Table 48 - Forecast Other Lodging Sales: Value 2023-2028

Table 49 - Forecast Other Lodging Online Sales: Value 2023-2028

Table 50 - Forecast Lodging (Destination) Outlets: Units 2023-2028

[Booking in Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Digitalisation taking on greater relevance in booking

Flexible payments and new experiences helping to drive bookings

PROSPECTS AND OPPORTUNITIES

Innovation likely to remain focused digital and payment solutions aimed at improving the customer experience and creating a more secure environment

Booking operators will need to expand their range of services to reach an increasingly demanding audience

CATEGORY DATA

Table 51 - Booking Sales: Value 2018-2023

Table 52 - Business Travel Sales: Value 2018-2023

Table 53 - Leisure Travel Sales: Value 2018-2023

Table 54 - Travel Intermediaries NBO Company Shares: % Value 2018-2023

Table 55 - Forecast Booking Sales: Value 2023-2028

Table 56 - Forecast Business Travel Sales: Value 2023-2028

Table 57 - Forecast Leisure Travel Sales: Value 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/travel-in-italy/report.