Hospitality: Touristic Flows, Supply and Demand

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To provide insights on the impact of the Design Week, a phenomenon that has Salone del Mobile.Milano as its primary catalyst, we employed a process-based analysis and reporting approach. Following the ideal *visitor journey*, we were able to break down and examine the critical elements of an experience that, each year, involves thousands and thousands of visitors. Accordingly, the first part of this section focuses on analysing the arrivals of Italian and foreign visitors in Milan for the event. In the second part, we examine the supply and use of hospitality services during the event, first considering the city and province of Milan, and then the hospitality trends in the provinces of Lombardy. The third part of the journey (Section 5.d) delves into the tourists spending for accommodation, dining and shopping. Finally, the fourth and last part of the journey, that is just as important, focuses on analysing visitor flows to the trade fair and/or across the city (Section 5.e), using urban mobility services. Adopting such an approach allows us, for this first research prototype on the Milan Design (Eco)System, to analyse and describe what the impact is of each stage of our journey, while always being aware of both the relationships and an overall vision that allows for the inclusion of topics such as circularity (Section 5.f).

Before starting the analysis of this journey, it is important to be reminded that the 2024 edition of Salone del Mobile.Milano took place from 16th to 21st April. The city's Design Week has almost always occurred during the same days, with the rare exception of a few events anticipating their opening (between the 12th and 15th of April). For our analysis we considered data that not only describe the general public (that usually attends the event during the week), but also the network of companies and professionals coming in to Milan before (e.g., for preparing activities) and sometimes remaining after the Week officially ended (e.g., for disassembling the exhibitions).

To provide a sense of the overall scale of the phenomenon we consider here, it is worth noting that the 2024 edition of Salone del Mobile.Milano hosted over 1,950 exhibitors. To this number we must add the hundreds of subjects who, in parallel, organise off-site events throughout the city — a network that, to date, can only be partially measured[1].

The first stage of our visitor journey starts with analysing arrivals in Milan by the main modes of transport: airways, railways and cars. However, to truly understand the impact of this event, it is first essential to define the central subject of the journey: the visitor — or rather — the visitors.

It is well-known that, during the event, the population of Milan temporarily increases, with the arrival of professionals, entrepreneurs, designers, students and design lovers from Italy and abroad, all of whom use the city's services and infrastructures[2]. It is also worth remembering that Salone del Mobile.Milano is a trade fair that only opens to the general public during the weekend, while in the prior days it remains exclusively accessible to professionals (Ch. 2, Section 2.a1). Given that premise, our analysis focuses on two main types of visitor: business tourists[3], that are coming to Milan for business reasons and stay at least one night, either in the city or in Lombardy; and city users[4], defined in this research as those who visit Salone and the Design Week events in Milan, without staying overnight.

In terms of visitor flows and origin, the data provided by SEA Group - Società Esercizi Aeroportuali[5] shows that from 15th to 21st April 2024 passenger traffic (arrivals and departures) in Milan Linate and Milan Malpensa Airports were 782,657 [6]; a 12% increase on the week of Salone 2023 edition (698,823) (). In terms of flight origins and destinations, SEA estimates that European countries account for more than 54% of all arrivals and departures (+18% on 2023). Italian destinations account for more than 24%, while the remaining 22% of flights routes is non-European, the latter figure having significantly increased with respect to the 2023 edition. SEA estimated that Asia would be the first among the non-European routes, in terms of increase in arrivals and departures (a +53% compared to Salone 2023 edition), a figure caused by a rise in Chinese airline flights. Other expected relevant increases for 2024 regard Middle Eastern countries (more than 47% compared to 2023) and the USA[7]

(more than 4%). Moving to the regional level, figures by Assaero-porti on Milan Bergamo Airport passengers show that, in April 2024, the total number of passengers reached 1,496,622[8], an increase of 9.7% compared to April 2023 (1,364,183 passengers)[9].

Milan Linate Airport (arrivals and departures) — Milan Malpensa Airport (arrivals and departures) — Total

Design Week 2023 — Design Week 2024

782,657
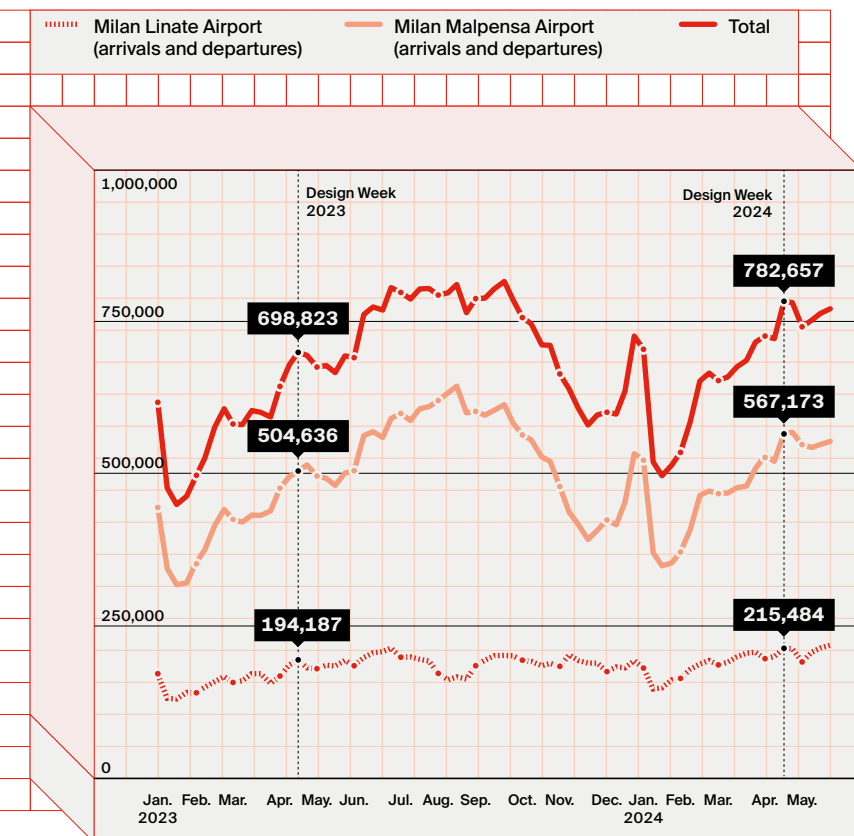698,823
567,173
504,636
215,484
194,187

Figure 5.1 clearly shows two trends: first, a generalised increase of arrivals and departures between the 2024 and 2023 editions of the event; second, the weeks considered rank among the highest peaks of passenger movements throughout the year[10]. Other peaks coincide with tourist arrivals and departures over the summer period, from June to September.

Moving to regional and national rail transport, arrivals and departures are supported by specific economic incentives — such as special daily tickets[11]. Importantly, visitors can reach Salone del Mobile.Milano by train via direct connections between Fiera Milano, Rho and the main national high-speed train stations such as those located in Turin, Bologna, Reggio Emilia, Florence,

Rome and Naples. To promote sustainable transport, as noted previously, Salone del Mobile.Milano has renewed its partnership with *Frecciarossa* — the official train of the event — including 26 daily connections that stop at the Rho Fiera train station in 2024.

At the same time, in terms of car use, despite an increase in the number of visitors, the percentage of them arriving at the exhibition district (Fiera Milano, Rho) by private transport (mainly private car) remained essentially unchanged between the two editions (from 41.67% in 2023 to 40% in 2024). Equally the percentage of visitors, professionals and media using public transport has remained essentially unchanged (from 58.33% in 2023 to 60% in 2024, see also Section 5.e). Data from Salone del Mobile.Milano 2024 show that an increase in the event's visitors (+20.2% compared to 2023) has not substantially changed the private and public transport use percentages. In the future, it might be interesting to monitor how this balance evolves, also in light of factors such as the growth of electric mobility (cars and vans) and the dynamics of vehicle flows entering and leaving the fair location. It is possible to imagine that the possibility of using practical and sustainable transport solutions will, over time, lead to the visitor's preference for public transport.

The second stage of our journey provides a first analysis prototype that investigates the hospitality landscape during Salone del Mobile.Milano and the Design Week. The analysis was primarily based on official data from the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region, and focused on business tourists. It builds its insights on two metrics: tourist arrivals and overnight stays[12] in the accommodation facilities of Milan and its province, which are themselves categorised by type (hotel or non-hotel establishments)[13] and capacity (number of rooms and beds). Tourist arrivals data describe the number of customers who registered in hotel and non-hotel accommodation: i.e., an arrival corresponds to a customer checking in at an accommodation establishment. Overnight stays, on the other hand, define the total number of nights spent by tourists in those establishments. For example, a group of 4 people spending 3 nights in an hotel would result in 12 overnight stays recorded in the data we considered. We used additional sources, such as tourist city tax payments[14], to further support the analysis with integrative data.

The data provided by Osservatorio Regionale indicates that, during the week of the event edition (15th–21st of April), 126,946 guests registered in Milan's accommodation facilities (+6.7% compared to the Design Week 2023, 17th–23rd of April, with 119,009 arrivals), while 168,188 arrivals were recorded in the

province (+4.8% compared to Salone 2023, with 161,188 arrivals). Compared to 2023 the number of overnight stays also increased in 2024 with 21.8% in the city and 19.9%[15] in the province. The overnight stays daily average was also higher during the 2024 edition than the previous year, both in Milan (54,495, +21.8% on the 2023 average of 44,717) and in the province (70,278, +19.8% on the 2023 average of 58,633). Growth of arrivals and overnight stays seems to have a direct proportional correlation with the increase in visitors of Salone del Mobile.Milano 2024 (the latter being the only subject that can provide verifiable data, thanks to its proprietary ticketing system).

Registered peaks in 2024 data on arrivals in Milan's accommodation facilities — between the 8th and 28th of April — coincide with Monday 15th of April (24,184 arrivals, Figure 5.2), that is the day before the opening of Salone del Mobile.Milano to professionals. The day with the highest number of overnight stays recorded in Milan was Friday, 19th of April (57,693 overnight stays, Figure 5.3, p. 184). Regarding arrivals in Milan, it seems interesting to notice the difference between Italians and foreigners. Foreign tourists followed the general trend in the data considered, with peaks in the data corresponding to the above-mentioned days. Italian tourists, instead, had the highest number of arrivals (8,336) and overnight stays (16,691) on Thursday 11th of April[16]. This difference may be attributed to the involvement of many Italians in the preparatory activities preceding Salone and the events in the city, usually taking place in the four days before their opening. It is also to be mentioned that, in the days following the event, the arrivals and overnight stays by Italians increased again, possibly because of the upcoming national holiday on the 25th of April.

Arrivals and overnight stays trends for the province of Milan do not differ significantly from those recorded in the city: in 2024, the peak of arrivals occurred on the 15th April (32,847), while the peak for overnight stays on Wednesday 17th April (74,334). Italians, unlike foreigners, had their peak of arrivals on Thursday 11th April (12,137) and Monday 22nd April (13,202), with the maximum number of overnight stays also on the 11th April (25,413). Conversely, foreigners follow the general trend, except for overnight stays, for which the recorded peak was on Friday, 19th April (55,976).

The sinusoidal trend, shown in Figure 5.2, on arrivals during the periods analysed (8th-28th of April 2024 and 10th-30th of April 2023), suggests the existence of three main types of visitors drawn to Milan for the event, also in the days immediately preceding it: Italian workers from other regions, potentially involved in the event's preparatory phases; business tourists, ar-

riving on the opening day of Salone del Mobile.Milano (as said, the first four days are reserved exclusively for professionals); and the so-called 'design lovers' — non-business tourists who come to Milan and its province over the weekend to attend the Design Week events in the city or visit the fair exhibition when it opens to the public. Finally, another relevant figure to note is the tourists' average stay in accommodation facilities during the 2024 edition week (15th-21st of April), which in Milan increased to 3 nights, from 2.6 nights in 2023; while in the province it increased to 2.9 nights, compared to 2.5 in 2023.

To ascertain the presence of a relevant number of tourists, we analysed the tourist tax data[17], provided by the Municipality of Milan (Figure 5.4, p. 184), which can also be fruitfully used to measure the number of overnight stays in hotel and non-hotel accommodation facilities in Milan[18]. Comparing tourist tax data for the month of April between 2023 and 2024 allows us to see an increase in overnight stays in Mi-
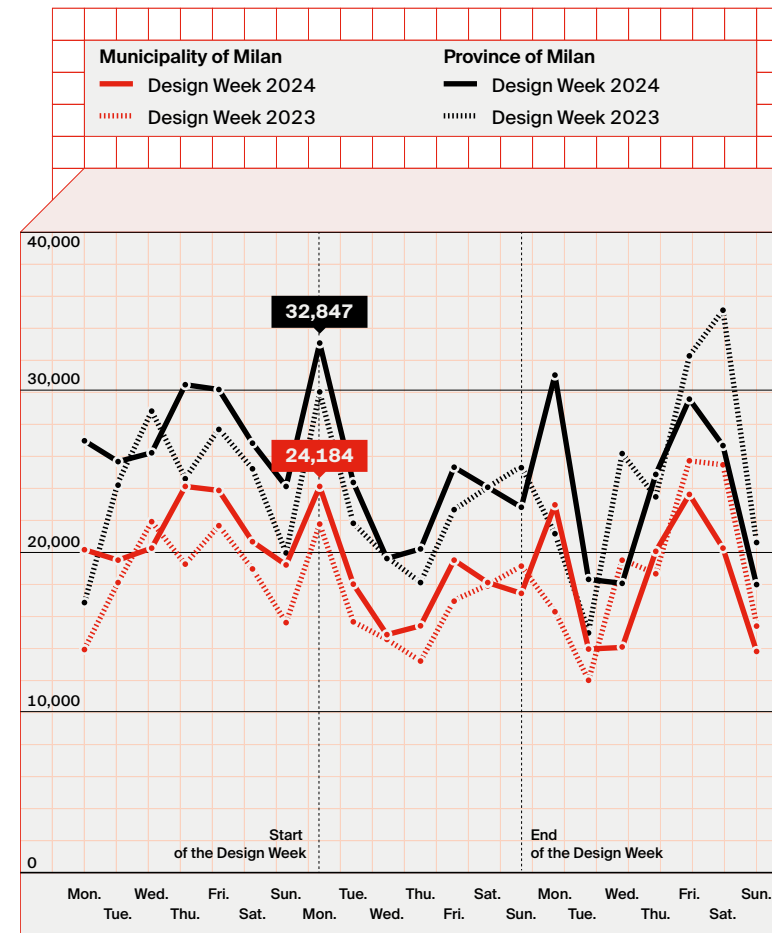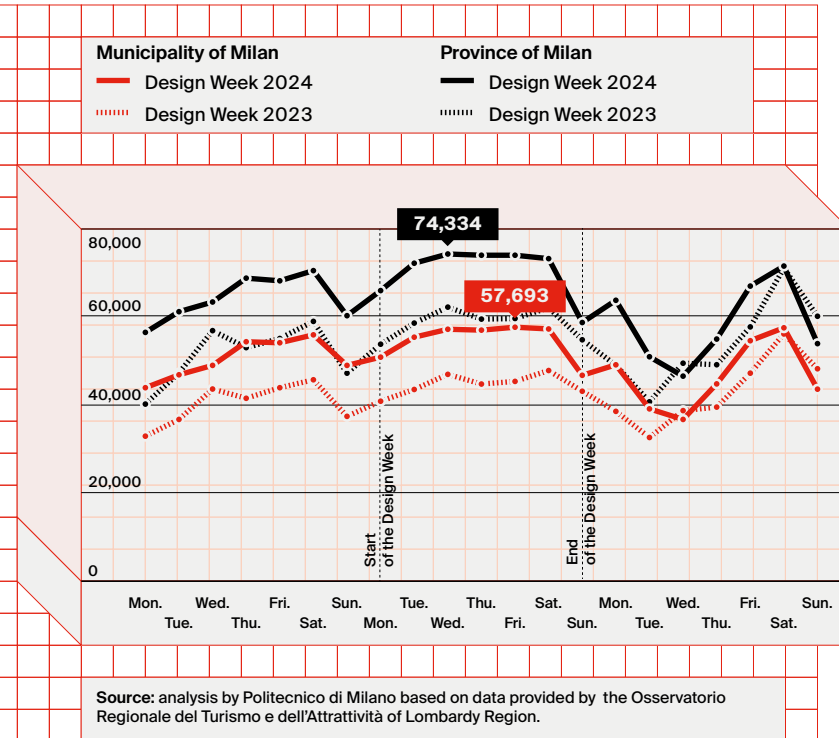

5.2 Registrations in the accommodation facilities of Milan and its province

Daily variation in the number of arrivals in Milan and its province, based on customers checking in at an accommodation establishment during the Design Week, the week before, and the week after (21 days in total). Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività or Lombardy Region.

Municipality of Milan
— Design Week 2024
······ Design Week 2023

Province of Milan
— Design Week 2024
······ Design Week 2023

32,847

24,184

Start of the Design Week

End of the Design Week

Mon. Wed. Fri. Sun. Tue. Thu. Sat. Mon. Wed. Fri. Sun.
Tue. Thu. Sat. Mon. Wed. Fri. Sun. Tue. Thu. Sat.

5.3
Daily overnight stays in the accommodation facilities of Milan and its province

Daily variation in the number of tourist presences in Milan and its province, based on number of overnight stays in accommodation establishments during the Design Week, the week before, and the week after (21 days in total). Data compared between 2023 and 2024.

Municipality of Milan	Province of Milan
—— Design Week 2024	—— Design Week 2024
···· Design Week 2023	···· Design Week 2023

Source: analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

5.4
Monthly overnight stays in the accommodation facilities of Milan (based on tourist tax)

Monthly variation in overnight stays in hotel and non-hotel facilities in the Municipality of Milan based on the analysis of tourist city tax. Data compared between 2023 and 2024.

—— Overnight stays in hotel facilities
—— Overnight stays in non-hotel facilities

Fonte: analysis by Politecnico di Milano based on data provided by the Municipality of Milan, Directorate of Public Budget and Public-participated Companies – Tax Administration Area.

lan by 2.5% for 2024 (1,671,262 overnight stays in 2023 against 1,712,308 in 2024)[19].

As for what concerns the origin of these visitors, data from Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region shows a significant increase in stays by foreign visitors. For the 2024 edition of Salone, in Milan alone, the Osservatorio Regionale reported 306,535 foreign guests registered in hotel and non-hotel accommodation (+27.3% compared to 2023)[20], a figure consistent with the attendance recorded by Salone del Mobile.Milano. The main countries of origin for guests in Milan's hotel and non-hotel accommodation were the United States (8.5% of the total), China and Asia (8%), France (7.5%), Germany (7%), followed by the United Kingdom, Spain, and Brazil. During only the opening days of Salone del Mobile.Milano 2024 (16th-21th of April), foreign visitors accounted for 80% of the total accommodation occupancy in Milan, exceeding the yearly average of overnight stays in the city by 10%. Another relevant figure, albeit on a monthly basis, is the number of foreign arrivals at accommodation facilities in the provincial capitals, which during April 2024 increased their monthly averages. The leading city is Brescia with 115,576 (+16%), followed by Como (93,005; +13%), Varese (58,659; +8%) and Bergamo (48,313; +6.7%), which are provincial capitals close to Lombardy's airport hubs[21].

Data from the Osservatorio Regionale also indicates that in 2024 the total number of hotel and non-hotel accommodation facilities across the entire region was equal to 55,459 units (+43.8% compared to 2023). The provinces with the most significant increase in accommodation facilities were Milan (+67.1%), Varese (+66.1%) and Monza and Brianza (+51.1%)[22] (Figure 5.5, p. 186). The data also highlights that hotel facilities in the territory contributed only minimally to the increase in bed capacity (+1.7%). By contrast, the capacity of non-hotel accommodation has seen significant growth.

Focusing specifically on Milan, the number of hotel and non-hotel rooms in 2024 increased by 23.3% compared to 2023, from 51,552 to 63,576. Of these, in line with the regional trend, over half (34,033) are rooms in non-hotel facilities (Figure 5.6, p. 186 and Figure 5.7, p. 187). If we further analyse the data on bed availability, the total of available beds in Milan is equal to 137,017 for 2024 (+27% compared to 2023), with 59% of these provided by non-hotel facilities[23]. As we can see from the Municipality of Milan open data[24], non-hotel accommodation facilities available in the city are primarily houses and apartments (managed both commercially and privately) for short-term rentals[25] (Figure 5.8, p. 188. The administrative sub-area called *Municipio 1* — that encompasses the city's most central neighbourhoods

5.5 Accommodation facilities in the provinces of Lombardy

Number of hotel and non-hotel accommodation facilities in the provinces of Lombardy. Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.
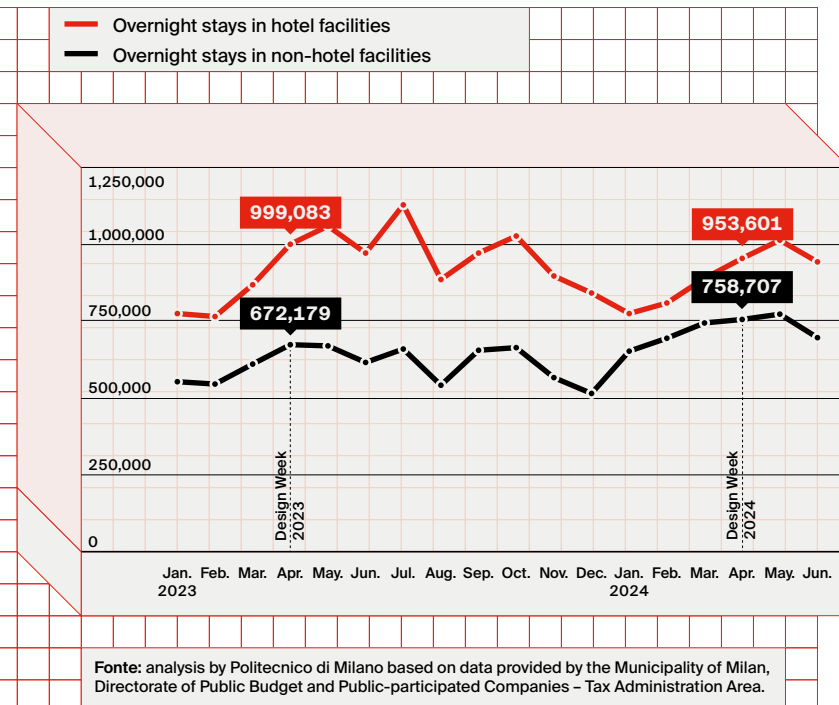
	2023	2024	Var. %
Bergamo	2,380	3,388	42.4%
Brescia	7,070	8,369	18.4%
Como	5,869	7,734	31.8%
Cremona	366	483	32%
Lecco	2,201	3,092	40.5%
Lodi	116	164	41.4%
Monza and Brianza	521	787	51.1%
Milan	12,936	21,622	67.1%
Mantua	848	997	17.6%
Pavia	705	873	23.8%
Sondrio	4,203	5,252	25%
Varese	1,624	2,698	66.1%
Total	**38,839**	**55,459**	**42.8%**

5.6 Accommodation capacity in the provinces of Lombardy

Number of hotel and non-hotel accommodation facilities, number of rooms and beds in hotel and non-hotel facilities in the provinces of Lombardy. Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

	Hotel	Non-Hotel	Total
Accomodation facilities (2023)	2,791	36,048	38,839
Accomodation facilities (2024)	2,836	52,623	55,459
% variation (2023-2024)	1.6%	46%	42.8%
Rooms (2023)	100,536	78,368	178,904
Rooms (2024)	102,135	107,919	210,054
% variation (2023-2024)	1.6%	37.7%	17.4%
Beds (2023)	199,091	315,322	514,413
Beds (2024)	202,497	384,621	587,118
% variation (2023-2024)	1.7%	22%	14.1%

5.7 Accommodation capacity in the Municipality of Milan

Number of facilities, number of rooms and beds in hotel and non-hotel facilities in the Municipality of Milan. Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

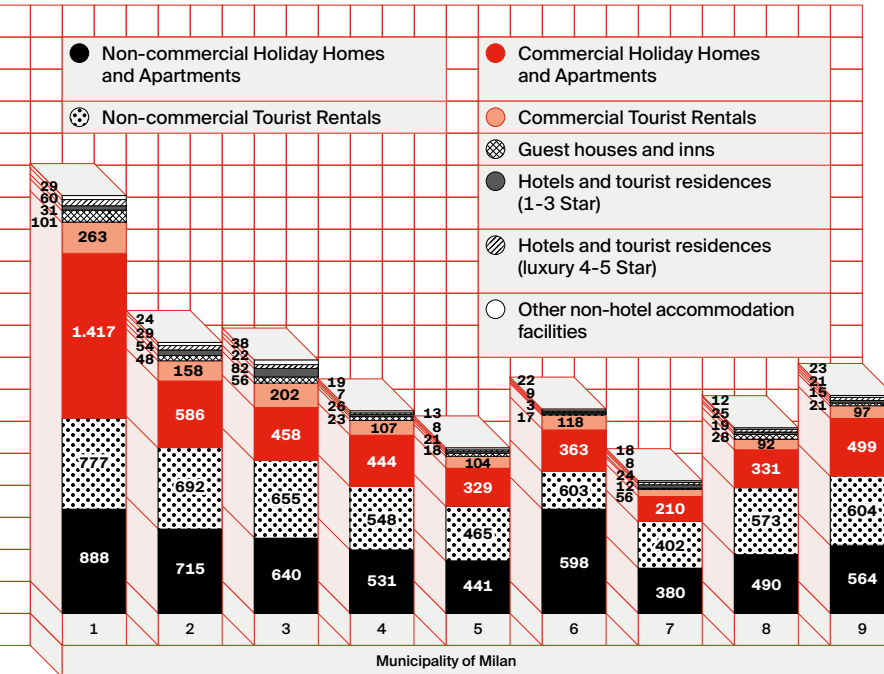|	Hotel	Non-Hotel	Total
Accomodation facilities (2023)	491	10,912	11,403
Accomodation facilities (2024)	487	18,551	19,038
% variation (2023-2024)	-0.8%	70%	67%
Rooms (2023)	29,098	22,454	55,552
Rooms (2024)	29,543	34,033	63,576
% variation (2023-2024)	1.5%	51.6%	23.3%
Beds (2023)	55,745	52,140	107,885
Beds (2024)	56,646	80,371	137,017
% variation (2023-2024)	1.6%	54.1%	27%

and key locations for the Design Week, such as Duomo, San Babila, Brera, Sant'Ambrogio and Sarpi — has the highest concentration of non-hotel accommodation facilities (3,566 out of a total of 19,038 facilities, or 18.7%), followed by *Municipio 2* (which encompasses key areas like the Central Train Station and part of the Isola neighbourhood), *Municipio 3* (encompassing the area of Porta Venezia), Municipio 9 (Porta Garibaldi station and part of the Isola neighbourhood) and *Municipio 6* (Tortona).

To further investigate this topic, we considered several other data sources. Data accessible through the independent project Inside Airbnb[26] for the 12th April 2024, show that 20,514 apartments were available on Airbnb in Milan. Airbnb[27], on the other hand, declares that, for the 2024 edition of Salone, online searches for a stay in Milan increased by over 95% compared to the annual average. Moreover, Centro Studi Abitare Co[28] reported that the average weekly rate in Milan for a short-term rental during the 2024 event was €3,855, which represents +214% increase compared to the €1,207 normally paid during a standard week.

In this situation, the significant rise in prices for rents short-

5.8
**Accommo-
dation facilities
of *Municipi*
(local councils)
of Milan**

Types of
accommodation
facilities and
their number,
distributed
across the nine
Municipi (local
councils) of the
Municipality of
Milano.
Source: Analysis
by Politecnico di
Milano based on
Municipality of
Milan Open Data
(2024).

Legend:
- ● Non-commercial Holiday Homes and Apartments
- ● Commercial Holiday Homes and Apartments
- ⊛ Non-commercial Tourist Rentals
- ● Commercial Tourist Rentals
- ▦ Guest houses and inns
- ● Hotels and tourist residences (1-3 Star)
- ▨ Hotels and tourist residences (luxury 4-5 Star)
- ○ Other non-hotel accommodation facilities

Municipality of Milan

er than 30 days, or ultra-short rents[29], emerges as a trend. This phenomenon becomes particularly evident during high-profile events such as Salone del Mobile.Milano, the Design Week, and other major events in Milan that are typically associated with cultural and creative tourism[30], and business-driven tourism as well. In other words, these are moments when an increased demand allows for profit maximization (see Section 5.d on tourism spending). The latest findings from the Italian Association of Short-Term Rental Managers (AIGAB)[31] offer interesting insights to better understand the opportunistic nature behind this increase of prices. The AIGAB 2024 report underlines that only 36% of properties in Milan remain available online all year-round. As for hotel facilities, data from Federturismo Confindustria[32] for the first three months of 2024 estimates an occupancy rate of 71% for hotel rooms in Milan. Additionally, the average occupancy rate of hotels in the city during the 2024 event reached 80%[33], which is well above the national average of 65.3%.

As in the case of non-hotel facilities, the demand for hotel accommodation in central areas of Milan was exceptionally high. The mid-to-high tier hotels and those closer to Design Week events and the northwest part of the city near the location of Salone del Mobile.Milano were in particularly high demand. Again, regarding hotel accommodation, through data from *THE NEXT*

2024 report by Global Blue and Lybra Tech[34], also cited by Federturismo Confindustria, we are provided with an additional profiling of visitors to Milan for this international event: of these hotel nights, 71% are spent by couples, 17% by single individuals, and 10% by groups or families.

The data considered confirms that Salone del Mobile.Milano and the Design Week 2024 editions generated, once again, a substantial overall increase in arrivals and overnight stays in the area. The event is also linked to an expansion in both supply and demand for non-hotel accommodation, suggesting the need to develop future hospitality models that are more affordable, and less impactful for the visitors (see Section 5.d).

Increased accommodation prices, rather than their availability, represent the main issue emerging from the data considered, equally affecting the hotel and non-hotel hospitality segments. Connected to this, another trend emerges: an increased accommodation availability in areas that are more easily connected to Milan (i.e., by faster travel times). These trends suggest the potential of shaping a new hospitality map, that extends to the inter-provincial scale, in order to improve both the supply and communication of accommodation options in Milan and its closer areas. This new map should include those destinations outside the region of Lombardy from which Milan can be reached within 60 minutes thanks to high-speed trains: for example, Bologna, Reggio Emilia and Turin. Lastly, the future possibility of accessing city data – that will be increasingly accurate and with a broader coverage – with the aim of monitoring the dynamic 'changes of temperature' in the ecosystem during the event (e.g., monitoring of arrivals hot spots with a detailed breakdown of tourists' origins, transit and stays) might provide the basis for new valuable insights. These will not only be useful for defining a new geography for hospitality, but also for suggesting new strategic alliances within the territory, as well as new hospitality services[35].