



UNIVERSITÀ DI NAPOLI
L'ORIENTALE

Towards a Direct Air Connection Between Naples and China

An Analytical Report on Economic Linkages,
Tourism Potential, and Air Connectivity

Edited by
Enrico Maria Fardella



UniorPress
Napoli 2026



Towards a Direct Air Connection Between Naples and China

An Analytical Report on Economic Linkages,
Tourism Potential, and Air Connectivity

Edited by
Enrico Maria Fardella



UniorPress

Via Nuova Marina, 59 - 80133, Napoli

uniorpress@unior.it

ISBN 978-88-6719-378-3



This work is licensed under a Creative Commons
Attribution 4.0 International Licence



Table of Contents



Executive Summary	5
Authors' Biographies	7
Acknowledgements	11
Introduction , Enrico Maria Fardella	13
1. Analysis of the Relationship between China and the Catchment Area , Enrico Maria Fardella, Giorgio Prodi, Antonio Barreca, Raffaele Boffardi, Miriam Verzellino	15
1.1. Economic Relationships	15
<i>Participation in the Business Community</i>	15
<i>Foreign Direct Investments</i>	19
<i>Trends in China-Italy Trade</i>	20
<i>Trade Between China and the Catchment Area</i>	21
<i>Sectoral Breakdown of Trade Flows</i>	29
1.2. Demographic Trends	33
<i>Demographic trends of the Chinese community</i>	33
<i>Residence Permits for Chinese Citizens</i>	39
<i>Work-based residence permits</i>	39
<i>Italian Community in China</i>	40
1.3. Cultural, Academic and Scientific Cooperation	43
<i>Academic Relationships and Cooperation</i>	44
<i>Chinese Students in Universities of the Catchment Area</i>	47
<i>Cultural, Scientific, and Technological Exchange</i>	48
<i>Cultural activities referring to the Catchment area in China</i>	51
<i>Cultural activities about China in the catchment area</i>	53

2. Chinese Tourism , Enrico Maria Fardella, Antonio Barreca, Raffaele Boffardi, Miriam Verzellino	55
2.1. Chinese Tourism in Italy.....	57
<i>Presence of Chinese tourists</i>	57
<i>Main characteristics of Chinese tourism</i>	58
<i>Chinese travelers' opinions and reasons for traveling to Italy</i>	61
2.2. Chinese Tourism in the catchment area	63
2.3. Potential of Naples and Campania:	
Content analysis on Chinese social media.....	69
<i>Internet users in China</i>	69
<i>Naples on Xiaohongshu</i>	70
<i>Italian Promotional System in China</i>	75
<i>Perception of Naples</i>	76
<i>L'Amica Geniale</i>	77
3. Flight Analysis , Giorgio Prodi, Raffaele Boffardi.....	81
3.1. Passenger Flows between Naples and China.....	83
<i>Origin and Destination of Passengers</i>	84
<i>Intermediate Hubs</i>	86
<i>Seasonal patterns</i>	90
3.2. Flights between China and other representative Italian airports.....	91
Conclusions , Enrico Maria Fardella, Giorgio Prodi, Antonio Barreca	95
List of Tables	97
List of Figures	99





Executive Summary

1. **Strengthening Economic Ties** – Over the past decade, economic interactions between China and the catchment area have intensified, with bilateral trade volumes reaching unprecedented levels. China is now the primary supplier for the region, accounting for 14.2% of total imports.
2. **Business and Investment Growth** – Chinese-owned businesses in the catchment area have experienced a 12.4% growth since 2014. Additionally, foreign direct investments from China are steadily increasing, with notable engagements in the industrial and service sectors.
3. **Academic and Cultural Collaboration** – The number of academic partnerships has expanded significantly, with 81 agreements between universities in the catchment area and Chinese institutions, reflecting growing intellectual and scientific exchange.
4. **Expanding Tourism Potential** – The catchment area has seen a resurgence of Chinese tourist arrivals following the easing of travel restrictions. Projections for 2024 indicate a continued increase, reinforcing the region's position as a prime destination for Chinese travelers.
5. **Promising Digital Engagement** – Content analysis on Chinese social media platforms, such as Xiaohongshu, highlights Naples as an emerging destination of interest. Digital outreach efforts are proving instrumental in capturing the Chinese travel market.
6. **Infrastructure and Connectivity** – The region benefits from strong transport and logistical infrastructures, including the Naples International Airport, major seaports, and intermodal freight hubs, which can support direct air connections with China.



7. **Sectoral Trade Composition** – Pharmaceutical products, food and beverages, and machinery represent over 50% of the region's exports to China, signifying key sectors of bilateral economic engagement.
8. **Demographic and Societal Trends** – The local Chinese community remains a vital component of the business landscape, with a notable presence in the service sector. Work-based residence permits for Chinese nationals have shown a consistent increase, indicating deeper integration into the regional economy.
9. **Aviation and Passenger Flow Analysis** – Current air traffic data suggests increasing demand for direct flight connections between Naples and China, with key intermediate hubs currently facilitating these movements.
10. **Strategic Implications for a Direct Air Route** – While the economic ties between Naples and China are still developing, the promising growth in tourism offers a more immediate and compelling reason to pursue a direct flight connection. A direct air link would not only strengthen cultural and academic exchanges but also tap into the expanding Chinese tourist market, further enhancing the region's visibility and appeal as a travel destination. The increasing flow of Chinese visitors to Naples, combined with the region's digital and promotional efforts, suggests that such a route could play a key role in fostering long-term economic and tourism growth. However, to ensure the route's success in a competitive market, coordinated co-marketing initiatives and joint promotional campaigns between airlines, tourism boards, and key industry stakeholders will be essential. Strategic partnerships, targeted digital outreach, and tailored travel packages for Chinese visitors will help maximize demand and sustain long-term viability. Additionally, investments in localized services, multilingual support, and seamless connectivity with other European destinations will further strengthen Naples' positioning as a preferred gateway for Chinese travelers.



Enrico Maria Fardella

Enrico Maria Fardella is an Associate Professor in the Department of Social and Human Sciences at the University of Naples L'Orientale and Adjunct Professor at the School of Advanced International Studies (SAIS) Europe of Johns Hopkins University. He serves as the Director of the ChinaMed Project and Associate Director of the Guarini Institute for Public Affairs at John Cabot University in Rome. He is an Honorary Life Member of Trevelyan College at Durham University and sits on the editorial boards of the European Journal of East Asian Studies and Orizzonte Cina. Previously, Dr. Fardella worked as Global Fellow at the Woodrow Wilson International Center for Scholars in Washington, D.C. and held the position of Associate Professor at Peking University, where he also served as Director of the Center for Mediterranean Area Studies. Additionally, he was a Fellow of the Science & Technology China Program of the European Commission. His research interests encompass the history of Chinese foreign policy, as well as China's relations with the European Union, the Middle East, and Italy, from the Cold War to the present.

Giorgio Prodi

Giorgio Prodi is an Associate Professor in Applied Economics at the University of Modena and Reggio Emilia, Department of Education and Humanities. In BBS he is in charge of Asia and Pacific relations and Director of the MBA Hybrid in English. He graduated from the University of Bologna in Economics and then obtained a Masters in Economics from the London School of Economics and Political Science. He has a PhD in Economics and Institutions from Bologna University. He spent one of his three years of his doctorate program as a visiting student at Harvard University. He teaches industrial economics, applied economics, Chinese economy, and Geoeconomics and Globalization. His research activities can be divided into 2 macro areas: the study of structural changes in the manufacturing sectors and the Chinese economy with particular focus on the impact it has on Italian companies. On these topics he has published articles in international journals such as the Cambridge Journal of Economics, Journal of Evolutionary Economy, Scientific Reports, international Review of Economics and Finance. In addition to research, he carries out consultancy activities, he is a member of the Board of Directors of some manufacturing companies and he is board president of MIA Sgr. He is a partner and vice president of the board of TWAI (Turin World Affairs Institute) and board member of the GEI (Gruppo Economisti d'Impresa).



Antonio Barreca

Antonio Barreca has been the General Director of Federturismo Confindustria since 2011, the Federation that brings together the national tourism industry supply chain (9000 companies) of 25 trade associations. From this position, he has worked on projects and dossiers concerning companies belonging to very different sectors including transport, boating, airports, hotels, railways, ski lifts, ports and many others, and on topics such as taxation, credit, national and European institutional relations, union negotiations, European projects, relations with territories and regions, international relations, project management and management. Since 2020, he has been Special Advisor and Head of Project Management to Prince Turki Bin Talal Al Saud in Saudi Arabia for the economic, tourism and infrastructural development of the Asir Region. He graduated with honors in Political Science from Luiss Guido Carli University, then obtained a PhD in Comparative Public Law from the University of Perugia and furthered his studies at Harvard at the John Kennedy School of Government in 2013 and 2015. He collaborated with the Department of Economic Affairs of the Presidency of the Council before moving to Brussels where he worked for 10 years as Director of the European Affairs Office of Federturismo Confindustria, collaborating with institutions such as the European Economic and Social Committee, the European Commission and the European Parliament. He teaches at LUISS Guido Carli University and at Luiss Business School (of which he is a member of the Scientific Committee of the Master in Tourism Management) and has collaborated with numerous other universities. He was Vice President of the Tourism Commission of UNI (Italian Unification Body) and as a special delegate to those of ISO (International Standardisation Organization) in Geneva. He was Special Advisor on Tourism for the Sicily Region.

Raffaele Boffardi

Raffaele Boffardi is an Adjunct Professor of International Economics and Policies for Economic Development at the University of Naples “L’Orientale”. Since 2022, he has been a fixed-term Assistant Professor (RTDa) in Political Economy at the Department of Human and Social Sciences. He obtained a Master’s Degree in International Studies at the University of Naples L’Orientale and a Master of Science in Development Economics and Policy at the University of Manchester. He holds a PhD in International Studies from the University of Naples L’Orientale. His teaching activity focuses on international economics. His research interests include international economics, regional economics, public policy evaluation, sustainable development, and the circular economy. On these topics, he has published articles in several international journals, including Socioeconomic Planning Sciences, International Economics, Regional Studies, Journal of Cleaner Production, and Journal of Environmental Management. In addition to his academic activity, he has participated in research groups for the University research and nationally funded projects. He has also served as an Expert in Statistics and Economic Fields for NUVAP



(Nucleo di Valutazione e Analisi per la Programmazione) at the Department for the Cohesion Policy of the Italian Presidency of the Council of Ministers.

Miriam Verzellino

Miriam Verzellino is currently pursuing a second Master's degree in Political Science (Chinese Language Program) at the School of Government and Public Affairs of the Communication University of China in Beijing, supported by the prestigious Chinese Government Scholarship (CSC), awarded to her in 2023. Her research interests focus on digital governance, comparative politics, and political communication. She is also a Research Fellow at the ChinaMed Project, where she contributes to research on relations between China, Europe, and the Mediterranean region. In 2024, she completed the Italy-USA Foundation master's "Leadership for International Relations and Made in Italy", a selective program awarded to top-performing Italian graduates focused on international leadership, economic diplomacy, and global cooperation. In 2023, she obtained a Master's degree in Languages and Cultures of Asia and Africa from the University of Naples L'Orientale.



Acknowledgments

The authors wish to express their sincere gratitude to Prof. Roberto Tottoli, Rector of the University of Naples L'Orientale, for his constant support for initiatives aimed at strengthening the dialogue between academia and the broader socio-economic environment.

Special thanks are also due to Prof. Paolo Wulzer, Director of the Department of Human and Social Sciences (DSUS), for his encouragement and institutional support throughout the development of this initiative.

We are particularly grateful to the administrative staff of the University of Naples L'Orientale, whose professionalism and dedication were essential to the realization of this project. In this regard, we would like to extend our special appreciation to Dr. Antonietta Sportiello for her invaluable assistance and coordination.

We also wish to thank Roberto Barbieri, Chief Executive Officer of GESAC, and Alessandra D'Onofrio, in charge of Corporate Communication and Media Relations at GESAC, for their collaboration and for their commitment to fostering constructive partnerships between academic institutions and the aviation and tourism sectors.

Finally, we acknowledge with gratitude the support provided by Federturismo, whose contribution has been instrumental in facilitating the dialogue between the academic community and key stakeholders in the tourism industry.

This report has been produced within the framework of the cooperation established through the agreement between the University of Naples L'Orientale and GESAC – Naples International Airport.



Introduction

Enrico Maria Fardella

This report presents a detailed analysis of the most recent trends in socio-economic, cultural, and tourism exchanges between China and the catchment area. Its primary objective is to assess the feasibility of establishing a direct flight connection between Naples Capodichino Airport and China, leveraging the growing economic and touristic interactions between the two regions.

While this study serves as a comprehensive and updated overview of the current landscape, it also highlights the necessity of a strategic reflection on the emerging trends to foster the continuous growth of tourism flows. Strengthening these trends is crucial to further consolidating the economic conditions necessary for the successful launch of a direct air link.

The report is structured into three key sections:

1. **Analysis of the Relationship between China and the Catchment Area** – This section examines the deepening economic ties, focusing on trade, foreign direct investments, and the role of the Chinese business community in the catchment area. It also provides an overview of the sectoral composition of trade flows, emphasizing the region's increasing reliance on Chinese imports and the evolving export dynamics.
2. **Chinese Tourism Trends** – This part explores the recovery and growth of Chinese tourism, both in Italy and specifically in the catchment area. It includes an in-depth analysis of digital perceptions of Naples on Chinese social media and highlights the potential for enhancing the area's visibility among Chinese travelers.
3. **Flight and Passenger Flow Analysis** – This segment delves into aviation data, identifying passenger movement patterns between Naples and China. It assesses the role of intermediate hubs, seasonal travel variations, and the increasing demand for direct flight connections.

Through these sections, the report provides the most comprehensive and detailed panorama available to date on the evolving China-catchment area relationship. The insights presented herein offer valuable strategic guidance for decision-makers considering the implementation of a direct air route between Naples and China, positioning the region as a key gateway for Sino-European connectivity.



1. Analysis of the Relationship between China and the Catchment Area

Enrico Maria Fardella, Giorgio Prodi, Antonio Barreca, Raffaele Boffardi, Miriam Verzellino

1.1. Economic Relationships

In order to conduct a comprehensive economic analysis of the relationships between the catchment area and China, it is essential to consider three key aspects: the role of the Chinese community within the region's business structure, the primary foreign investment flows, and the trade relationships between the two regions. However, analyzing these economic ties poses significant challenges, particularly due to the growing integration of China into global value chains, which complicates the identification and measurement of direct interactions between the two regions. This increasing interconnectedness often hides the distinction between bilateral exchanges and broader international networks, making it more difficult to isolate the specific contributions of each region to the economic relationship.

Participation in the Business Community

In 2023, 3,408 businesses owned by Chinese nationals were operating in the catchment area, representing 6.9% of all firms in Italy owned by Chinese citizens (data from Registro Imprese). Within Campania, these businesses constitute the fourth-largest foreign business community, accounting for 9.5% of economic activities carried out by residents holding foreign citizenship.

The trend in the number of businesses in the catchment area between 2014 and 2023 has not been uniform, with the Covid-19 pandemic acting as a pivotal moment in the dynamics of Chinese involvement in entrepreneurial activities.

During the 2014-2019 period, there was a general expansion of Chinese-led businesses across all provinces in the catchment area, except Frosinone. Conversely, between 2019 and 2023, the number of businesses owned by Chinese nationals in the area decreased by 3.5%, with significant reductions observed in Frosinone and Avellino. The pandemic-related containment measures, including the closure of non-essential businesses, movement restrictions, and the subsequent energy crisis of 2022, had a detrimental impact on all sectors of the economy within the catchment area. Although the total number of businesses in the area decreased by only 1.2% in 2023 compared to 2019, this decline was more pronounced among Chinese-owned businesses, which experienced a reduction of 3.5%. Preliminary data for 2024 suggest that the Chinese business community continues to face challenges, with an additional 2% reduction in the number of businesses in the catchment area.

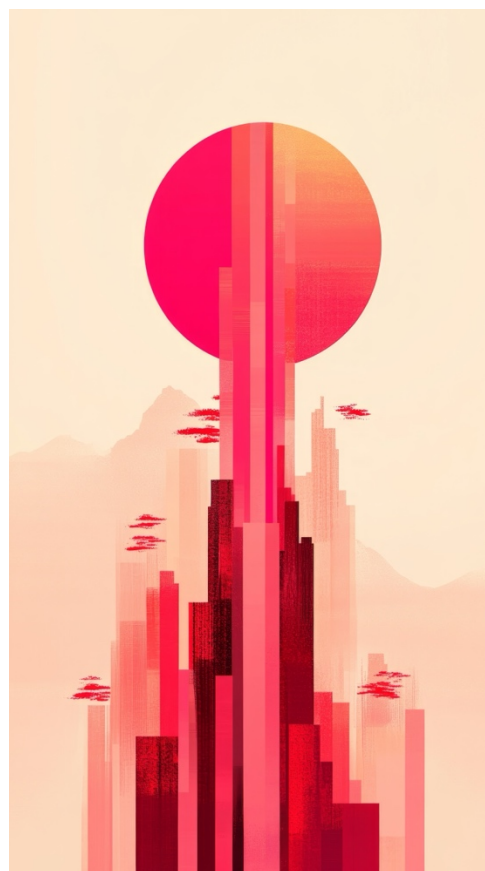


Despite the negative trends observed in the post-pandemic period, the number of businesses operated by Chinese nationals increased by 12.4% between 2014 and 2023. The most significant growth was recorded in the provinces of Benevento (+40%), Naples (+15.4%), and Salerno (+14.5%).

Table 1: Number of activities owned by residents with Chinese citizenship

Province	2014	2018	2019	2023	2024	2014- 2019	2019- 2024	2014- 2024
Naples	2,166	2,590	2,572	2,500	2,460	+18.7%	-4.4%	+13.6%
Caserta	289	316	319	317	319	+10.4%	0.0%	+10.4%
Salerno	173	202	200	198	198	+15.6%	-1.0%	+14.5%
Latina	143	137	135	131	125	-5.6%	-7.4%	-12.6%
Frosinone	105	111	111	94	88	+5.7%	-20.7%	-16.2%
Avellino	80	93	91	74	75	+13.8%	-17.6%	-6.3%
Benevento	38	45	50	53	43	+31.6%	-14.0%	+13.2%
Potenza	38	38	41	41	39	+7.9%	-4.9%	+2.6%
Catchment Area	3,032	3,532	3,519	3,408	3,347	16.1%	-4.9%	10.4%

Source: Authors' elaboration on data from the Milan Chamber of Commerce (Registro Imprese database)



From a territorial perspective, the largest share of Chinese-owned businesses is located in the Province of Naples, where 73% of these enterprises operate (2,500 out of 3,408). This is followed by the Provinces of Caserta (9.3%) and Salerno (5.8%). As of 2023, businesses in the Province of Naples accounted for 1.8% of the total number of Chinese-owned businesses in Italy, while the other provinces represented approximately 0.5% or less. This distribution highlights the concentration of the Chinese business community in Campania around the city of Naples, which serves as the largest and most densely populated urban area both within the catchment area and in Southern Italy.

Table 2: Territorial distribution of Chinese-led activities

	Chinese-led firms on total active firms	Chinese-led firms on total in the area
Naples	1.8%	73.4%
Caserta	0.6%	9.3%
Salerno	0.3%	5.8%
Latina	0.5%	3.8%
Frosinone	0.4%	2.8%
Avellino	0.3%	2.2%
Benevento	0.3%	1.6%
Potenza	0.2%	1.2%
Catchment Area	0.9%	100.0%

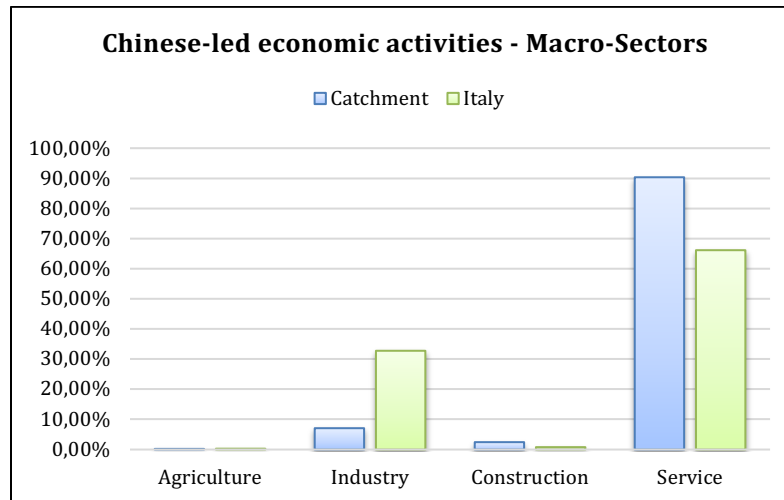
Source: Authors' elaboration on data from the Milan Chamber of Commerce (Registro Imprese database)

Figure 1 illustrates the distribution of Chinese-led businesses across four macro-sectors of activity¹. The data show that, in 2023, the service sector was the dominant sector in the catchment area, involving approximately 90.4% of all businesses. The proportion of Chinese firms in the service sector is notably higher than the national average, which stands at 66%. Within the service sector, the largest share is held by the "wholesale and retail trade", which accounts for 2,744 businesses, or 82% of the total in the area. Moreover, a significantly greater involvement of the local Chinese community is also observed in the construction sector: in the catchment area, there are 82 construction companies (15% of the total businesses in this sector). In contrast, the local Chinese community is less involved in the industrial sector, with 237 manufacturing enterprises, which represent "only" 7.1% of all businesses in the sector, while, nationally, industries represent around one-third of Chinese-led businesses (32.8%).

¹ *Agriculture*: A – Agriculture; *Industry*: C – Manufacturing Activities; *Construction*: F – Construction; *Service*: G – Wholesale or retail Trade; H – Transportation and storage activities; I – Activities of accommodation and catering services; J – Information and communication services; K – Financial and insurance activities; L – Real Estate; M – Financial activities and Professional, scientific and technical activities; N – Rental, travel agencies, business support services; Q – Healthcare and Social Assistance; R – Activities of art, sports, entertainment and fun.



Figure 1: Chinese-led economic activities among macro-sectors



Source: Authors' elaboration on data from the Milan Chamber of Commerce

Table 3: Sectoral distribution of Chinese-led activities²

ATECO Sector	Catchment Area		Italy
	Number	Share on Total	Share on Total
A	4	0.10%	0.30%
C	237	7.10%	32.70%
F	82	2.40%	0.80%
G	2,744	82.00%	35.70%
H	13	0.40%	0.20%
I	83	2.50%	14.90%
J	10	0.30%	0.30%
K	2	0.10%	0.10%
L	4	0.10%	0.20%
M	18	0.50%	0.90%
N	48	1.40%	0.90%
Q	3	0.10%	0.00%
R	2	0.10%	0.90%

Source: Authors' elaboration on data from the Milan Chamber of Commerce (Registro Imprese database)

² A – Agriculture; C – Manufacturing Activities; F – Construction; G – Wholesale or retail Trade; H– Transportation and storage activities; I – Activities of accommodation and catering services; J – Information and communication services; K – Financial and insurance activities; L – Real Estate; M – Financial activities and Professional, scientific and technical activities; N – Rental, travel agencies, business support services; Q – Healthcare and Social Assistance; R – Activities of art, sports, entertainment and fun.



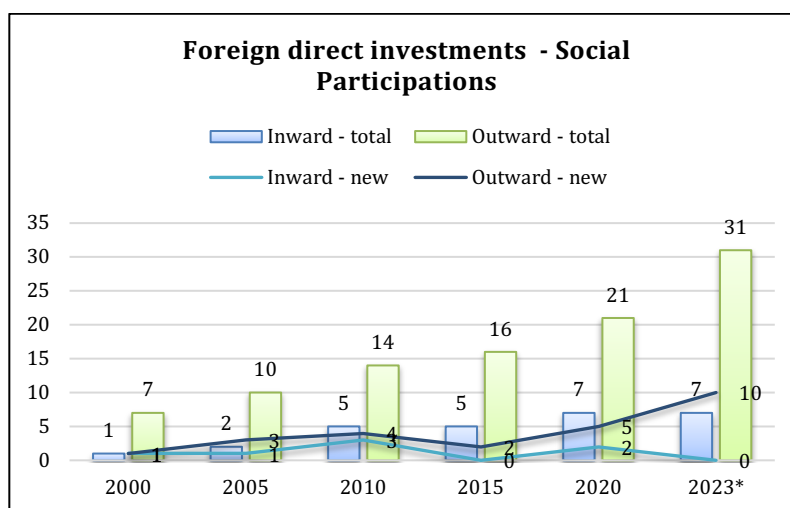
Foreign Direct Investments

Foreign direct investment data provided by the Italian Trade Agency shows that seven companies in the catchment area have direct Chinese participation in their corporate structures. Six of these companies are fully controlled by Chinese investors, while one has an equal Italo-Chinese ownership share. Two of these firms operate in the industrial sector (machinery and pharmaceuticals), while the rest are involved in the service sector, including retail trade, business services, and logistics.³

In terms of outward investments, companies based in the catchment area hold direct social shares in 31 businesses operating in China. Of these, 24 are fully controlled by companies from the area, three have minority shares, and four have equal ownership between Chinese and local firms. This figure represents 5% of the total number of firms operating abroad and with direct participation from firms legally registered in Campania and Basilicata (620 as of December 31, 2022). The industrial sector is the main operation area for Italian-owned activities in China, followed by wholesale and retail trade.

Although the absolute number of direct investments is small, the level of direct participation by companies from the catchment area in China has steadily increased since the early 2000s, with a significant rise in the 2020s (Figure 2). Notably, following the pandemic, the Italian Trade Agency reported ten new participations in China-based companies in 2021.

Figure 2: Inward and Outward Foreign direct investments



Source: Authors' elaboration on ICE Agency data

³ It is important to note that these data pertain only to companies with registered legal offices in the region, excluding those that have production facilities or operational headquarters in the area but are legally registered elsewhere in the country.

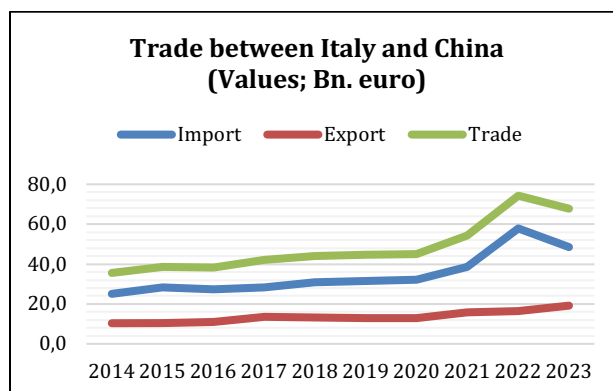


Trends in China-Italy Trade

Trade in goods represents a key dimension of the increasing economic integration between Italy and China. Total bilateral trade reached 67.8 billion euros in 2023, corresponding to an increase of approximately 90% compared to 2014 (35.5 billion euros). In 2023, exports to China peaked at 19.2 billion euros, while imports, at around 49 billion euros, declined relative to 2022, when imports reached 57.9 billion euros.

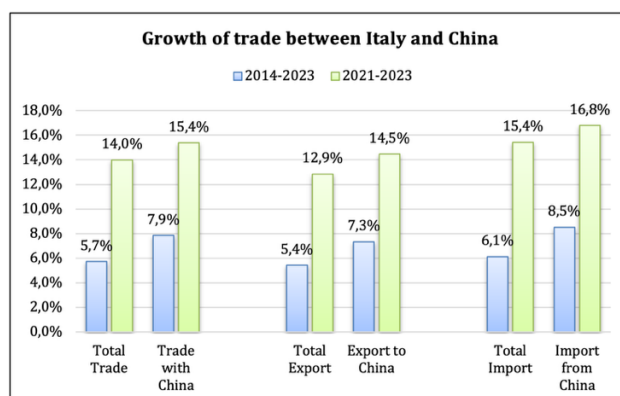
Overall, in the past decade, both export and import components have recorded sustained growth, with imports increasing at a slightly higher average annual rate (+8.5%) compared to exports (+7.3%). The expansion of trade flows between Italy and China has also outpaced the overall growth of Italian trade with the rest of the world (Figure 4). This trend helps to better understand the significance and dynamism of the Italo-Chinese trade relationship. As for 2024, data for the first three quarters indicate a negative trend, with a 5.4% reduction in total trade. This decline is primarily attributed to a contraction in exports to China (-23.3 %), while imports have shown a +1.9% increase.

Figure 3: Trade between China and Italy (Values; billion euro)



Source: Authors' elaboration of Coeweb ISTAT data

Figure 4: Growth rate of imports and exports from/to China



Source: Authors' elaboration of Coeweb ISTAT data





This positive trend has been particularly evident, and even more pronounced, in the period following the pandemic shock, when both the recovery and reorganization of various supply chains — mainly due to the Russo-Ukrainian war and the sanctions imposed on the Russian Federation – boosted the growth of both imports and exports. In fact, during the 2022-2023 period, the growth of trade with China outperformed the rates of growth registered by Italy's imports and exports with the rest of the world. In this period, imports showed a stronger growth rate than exports (+16.8% versus +14.5%). However, despite this overall growth, a slight reduction in trade flows occurred in 2023, marking the first negative outcome since 2016. From a sectoral perspective, while trade in the pharmaceutical, textile and clothing, and machinery sectors showed significant expansion compared to 2022, exports in most other sectors decreased, with notable reductions in the chemicals and transport sectors.

Overall, over the past decades, China has become a strategic partner for Italy, ranking as the 9th largest destination for Italian exports and the 2nd largest source of imports for Italian firms in 2023. Moreover, it is Italy's top destination for goods in Asia and the second-largest extra-EU trade partner after the United States (ICE, 2024). Conversely, Italy accounts for approximately 1% of Chinese exports and imports, which remains a relatively small share.

Trade Between China and the Catchment Area

Over the past decade, trade between the catchment area and China has exhibited significant dynamism, leading to a steady strengthening of commercial ties. As of 2023, China became the primary supplier in the catchment area, with total imports amounting to approximately 5.7 billion euros (14.2% of total imports in the region) (Table 4). This marks a clear improvement in China's position as an import partner compared to 2014, when it was the third-largest partner in the area. In contrast, China ranked 15th in terms of goods exported from the catchment area, with total exports to China reaching 283 million euros, or 0.7% of total export value. These figures indicate that while China is still not a major destination for exports from the catchment area, the region has become



increasingly attractive to Chinese exporters, as evidenced by the substantial growth in the value of goods imported into the area between 2014 and 2023.

Table 4: Imports and exports partner of the Catchment area (2023)

2023	2023 vs 2014	Partner	Value (Mln €)	Share on total Import	2023	2023 vs 2014	Partner	Value (Mln €)	Share on total Export
1	+3	China	5771.3	14.2%	1	+6	Switzerland	5472.1	13.9%
2	-1	Belgium	5587	13.7%	2	-1	Belgium	4673	11.9%
3	-	Germany	4167.5	10.3%	3	+2	US	4430.2	11.3%
4	+7	Switzerland	3124	7.7%	4	-2	Germany	3789.4	9.6%
5	+2	Spain	2294.4	5.6%	5	+3	Netherlands	3244.7	8.3%
6	-	Netherlands	2065.8	5.1%	6	-3	France	2367.4	6.0%
7	-2	France	1797.1	4.4%	7	-3	UK	1902.7	4.8%
8	-6	US	1744.1	4.3%	8	-2	Spain	1529.8	3.9%
9	-1	Poland	1145.6	2.8%	9	+3	Austria	691.3	1.8%
10	-1	Bulgaria	948.1	2.3%	10	-1	Poland	622.1	1.6%
					15	-1	China	283.17	0.7%
		ROW	11995.1	29.5%			ROW	10306.7	26.2%

Source: Authors' elaboration of Coeweb ISTAT data

During the considered period, trade flows between China and the catchment area have risen by around four billion euros between 2014 and 2023 (+280%). The registered growth rate (annual average equal to +20%) further increased in the years following the pandemic shock (2021-2023) to +50.3%.

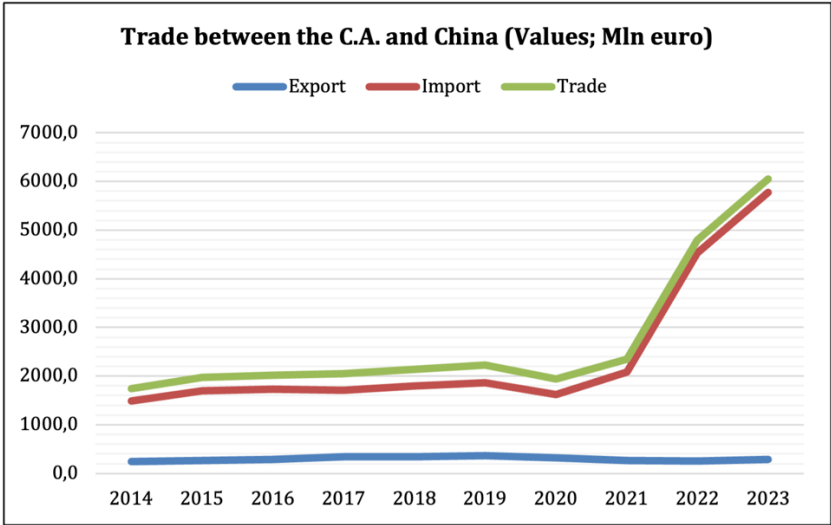
The development of trade relations between the catchment area and China reveals notable differences in flow composition when compared to national-level data. Specifically, in the catchment area, the growth in commercial ties is almost entirely driven by the exponential increase in imports from China. Importantly, imports have grown at an average rate of 18.2% during the period in question, with a total increase of approximately 4.2 billion euros. Import values reached 5.77 billion euros in 2023. As with the national data, but even more markedly, the growth rate of imports has accelerated in recent years, with an average annual growth



rate of 58% between 2021 and 2023. These growth rates significantly exceed the average national growth rate for imports, highlighting the dynamic nature of economic relations between China and the catchment area.

Conversely, there has been no substantial change in the value of exports from the catchment area to China. In 2014, exports amounted to 248 million euros, increasing to 283 million euros by 2023. While there was a modest positive change in the ten years (+2.1% on average), exports showed a decline in the post-pandemic years, with an average decrease of -3.5% (-17.2% in 2021, -3.7% in 2022, and a +10.4% increase in 2023).

Figure 5: Trade flows between the catchment area and China (Mln euro)



Source: Authors’ elaboration of Coeweb ISTAT data

Figure 6: Growth rate of trade flows from/to China



Source: Authors’ elaboration of Coeweb ISTAT data





In 2023, trade between China and the catchment area accounted for approximately 7.5% of Italy's total trade, nearly double the share reported in the previous decade (it was 3.5-4% between 2014 and 2021). This increase is primarily driven by a sharp and sudden rise in imports, which now make up around 12% of Italy's total national imports. These imports are largely composed of products from the chemical sector entering the province of Naples.

On the export side, after a gradual increase in the pre-COVID period (rising from 2.4% of total Italian exports to China in 2014 to 2.8% in 2019), the share of exports from the catchment area to China has steadily declined between 2021 and 2023, falling to 1.5% in 2023.

Table 5: Relevance of trade flows of the catchment area on total national trade

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Trade	4.2%	4.0%	3.9%	3.7%	3.7%	3.6%	3.3%	3.7%	6.3%	7.6%
Export	2.4%	2.6%	2.6%	2.5%	2.6%	2.8%	2.5%	1.7%	1.6%	1.5%
Import	6.0%	6.0%	6.3%	6.0%	5.8%	5.9%	5.0%	5.4%	7.8%	11.9%

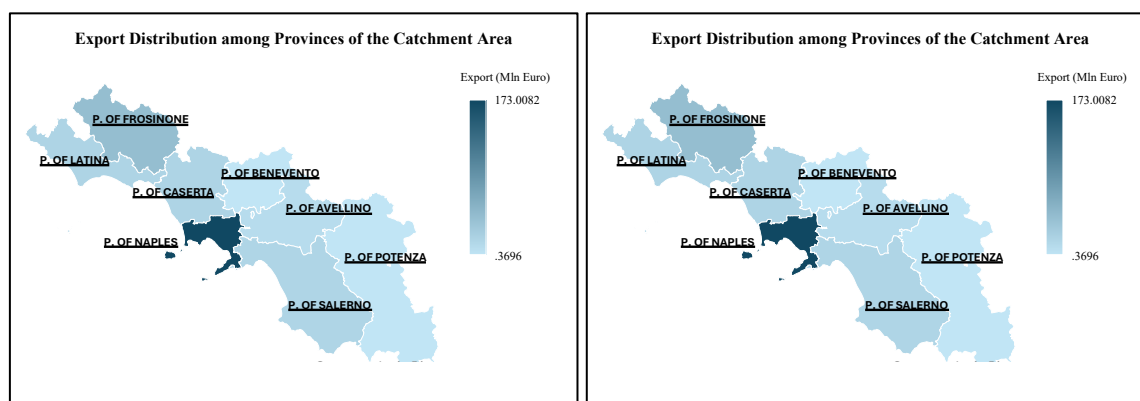
Source: Authors' elaboration of Coeweb ISTAT data

From a territorial perspective, trade between China and the catchment area is highly concentrated in the province of Naples, which accounts for 83.4% of imports and 61.1%



of exports (Figure 7; Table 6). Following Naples, the province of Salerno (5.4% of total imports; 6.4% of total exports) also reports relatively higher shares of trade with China.

Figure 7: Spatial distribution of imports and exports from/to China in the catchment area



Source: Authors' elaboration of Coeweb ISTAT data

Table 6: Import and export towards China in the catchment area

Province:	Total Value (Mln Euro) of:		Share of total:	
	Import	Export	Import	Export
Latina	95.4	18.6	1.7%	6.6%
Frosinone	203.6	43.5	3.5%	15.4%
Caserta	119.0	19.0	2.1%	6.7%
Benevento	24.3	0.6	0.4%	0.2%
Napoli	4,867.4	173.0	84.3%	61.1%
Avellino	86.0	9.8	1.5%	3.5%
Salerno	314.4	18.3	5.4%	6.4%
Potenza	61.0	0.4	1.1%	0.1%
Catchment Area	5,771	283.2	100.0%	100.0%

Source: Authors' elaboration of Coeweb ISTAT data

Naples and Salerno represent the two main economic and demographic poles within the catchment area, characterized by the highest population levels and gross domestic product among the provinces considered, as well as a relative advantage in terms of infrastructure endowment. Both cities host airport facilities; in particular, Naples is home to the only international airport in the area, Naples Capodichino Airport, which provides direct connectivity to a wide range of international destinations.

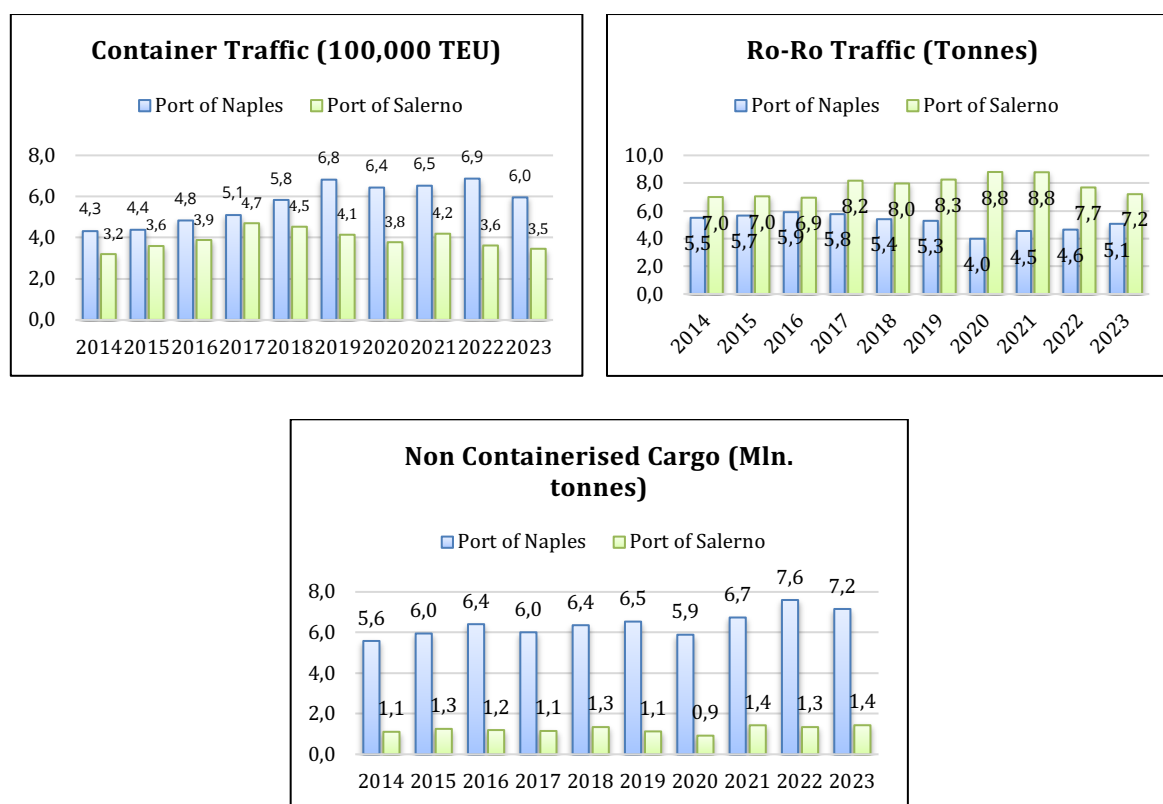
Other key infrastructures are represented by the Ports of Naples and Salerno, which are jointly managed by the Central Tyrrhenian Sea Port Authority: the former ranked the 10th largest port in Italy, while the latter ranked 13th by freight volume handled in 2023 (data from the Italian General Confederation of Transport and Logistics). More in detail, 595,740 TEUs were processed in 2023 through the port of Naples: this value corresponds



to a +38% increase compared to 2014 – despite the sensible decrease reported compared to the previous year (-13%) (data from Central Tyrrhenian Sea Port Authority). Similarly, the port of Salerno managed 345,949 TEUs in container traffic, thus reporting a +8% increase in the volume of container processes in the ten years between 2014 and 2023.

Moreover, both ports are active in RO-RO activities (5.1 million tonnes in the port of Naples in 2023; 7.2 million tonnes in the port of Salerno in 2023). Finally, the two ports managed around 8.6 million tonnes of solid and liquid non-containerised bulk cargo. This amount of cargo is mainly concentrated in the port of Naples (7.1 million tonnes), which has reportedly increased its freight volumes by +28% since 2014. A similar increase has been registered for the Port of Salerno. Additionally, the port of Naples is a leader in cabotage operations, accounting for around 50% of Italy's total traffic in this sector⁴. More in detail, in the 2014-2023 period, the port of Naples handled around 6% of Italian container traffic to China and 8% of traffic from China to Italy, corresponding to 206 thousand and 218 thousand tonnes on average, respectively (EUROSTAT data).

Figure 8: Freight handled in the Ports of the Catchment area



Source: Authors' elaboration on data from the Central Tyrrhenian Sea Port Authority ⁵

⁴ <https://adsptirrenocentrale.it/adsp/porto-di-napoli/>

⁵ <https://adsptirrenocentrale.it/statistiche/traffico-merci/>



The Interport of Nola (Inteporto Campano) and the Interport of Marcianise (Interporto Sud Europa) represent other fundamental infrastructures for trade.

The former is located about 40 kilometres from Naples⁶. It functions as a retro-port logistics platform for managing imports and exports (primarily maritime containers) and as an intermodal distribution platform for mobile containers and semi-trailers. The site provides several key infrastructures, including an intermodal platform, a railway station, and a 24-kilometer network of roads and viaducts, as well as services such as customs processing for incoming goods, container inspection scanners, and an automated parking system. The intermodal platform at Nola, the core of the facility, houses customs areas, temporary storage areas, and a VAT deposit. Notably, it is the only intermodal platform in Italy with a direct connection to a private railway station managed by RFI (Italian Rail Network), with a capacity to handle 30 trains per day. In 2023, the Interporto Campano processed approximately 6 million tons of goods. In the same area, the CIS (Centro Ingrosso S.p.A.) represents the largest B2B commercial distribution system in Europe, serving as a dynamic and innovative hub. Within the CIS, operators have access to a diverse range of products, a highly competitive quality-to-price ratio, and the latest market trends, which are selected and showcased in advance, along with a comprehensive set of services designed to streamline the purchasing process. Spanning one million square kilometers, the CIS accommodates approximately 20,000 commercial operators daily and houses 120 representative offices and professional firms. It also houses the Nola Business Park Innovation Hub, created in collaboration with 012Factory – an incubator certified by the Ministry of Economic Development – to support companies in their digital innovation journey and foster the growth of high-potential innovative startups.



Located less than 30 km from Naples, there is also the Interporto Sud Europa (Marcianise)⁷. It plays a significant role as a logistics hub, benefiting from a direct rail connection to the Port of Naples and the presence of an intermodal terminal that

⁶ <https://www.interportocampano.it>

⁷ <https://www.interportosudeuropa.it/servizi/article-4/>



houses a temporary customs storage facility, a warehouse, and the offices of the Guardia di Finanza. With an operational area exceeding 4 million square meters, it is adjacent to Italy's largest freight terminal, which spans an additional 2.5 million square meters and is structured for the rail system. Storage is ensured by large warehouses covering over 330,000 square meters, where preliminary processing and transformation of goods destined for final markets can also take place. Its geographical location makes it a strategic point for intermodal transport, further enhanced by its proximity to Capodichino Airport (25 km). From a railway perspective, it is a key point of reference for both the European Corridor 1 and European Corridor 5. From a road transport standpoint, it is located at the intersection of two major motorway axes (A1-Milan/Naples and A30, connecting Salerno/Reggio Calabria and Bari/Taranto).

Close to the port of Salerno, the Battipaglia Freight Depot is an important logistics facility covering approximately 500,000 square meters. Thanks to its strategic position, it is well-connected by an integrated transport network that includes rail, road, and maritime links. The facility is served by the railway line, which directly connects it to the Port of Salerno, one of the main seaports in Southern Italy, thus facilitating rail freight traffic. Furthermore, the depot is situated near the A3 Naples-Salerno-Reggio Calabria motorway, ensuring fast connections with the rest of the country, as well as the SS18, which runs along the coast. Although not directly on the coast, its proximity to the Port of Salerno, combined with its connections to major transport routes, makes it a key logistics hub. Additionally, the Naples-Capodichino Airport, about 70 km away, provides further options for air freight, further enhancing its significance for national and European logistics.



Figure 9: Distribution on the key commercial infrastructure in Campania



Source: Authors' elaboration of

Sectoral Breakdown of Trade Flows

From a sectoral perspective, over half of the total exports to China from the catchment area are concentrated in three key sectors: pharmaceutical products, food and beverages, and machinery and equipment (N.E.C.).

Notably, pharmaceutical exports, which represent the largest export category overall from the catchment area, have begun a gradual recovery following the sharp decline experienced during the pandemic. In 2019, pharmaceutical exports reached €156.1 million but plummeted to €21.3 million in 2022. In 2023, this sector rebounded to become the primary export flow from the catchment area.

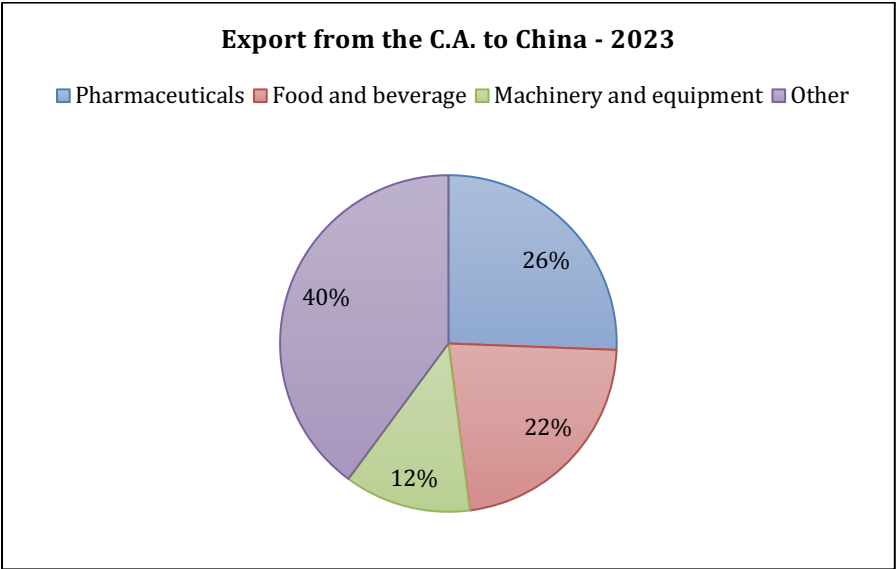
The catchment area is home to some of Italy's most significant pharmaceutical industry hubs. The Lazio region hosts the largest pharmaceutical cluster in Italy, employing 16,000 people and generating €11.5 billion in exports. This cluster is concentrated in the provinces of Latina and Frosinone, which together account for 95% of all pharmaceutical exports from the region, with Latina contributing 58% and Frosinone 37%. Key production sites in the area include Sanofi, Catalent, and ACS



Dobfar in Anagni, where vaccines from AstraZeneca, Johnson & Johnson, and Pfizer are bottled and distributed. Additionally, there are advanced technological facilities for producing monoclonal antibodies, including Janssen Cilag and BSP Pharmaceuticals, both located in Latina. Campania, on the other hand, hosts a significant pharmaceutical industrial hub, with 38 pharmaceutical firms — representing 35% of Southern Italy's pharmaceutical industry and 6% of the national total. This sector employs over 2,000 direct workers, with an additional 2,500 in supporting industries. The region is home to several multinational pharmaceutical companies, including NOVARTIS FARMA S.p.A. (Torre del Greco, Naples), DSM Capua S.p.A. (Capua, Caserta), HARDIS S.p.A. (Sant'Antimo), and Altergon Italia S.r.l. (Avellino). Notably, Novartis operates one of its main international production centers in Torre del Greco, which is currently undergoing a significant expansion, with a new 1,000-square-meter production area set to open in 2024 as part of a €350 million investment plan through 2025. Another key player in the region is Perrel S.p.A., a global manufacturer of dental anesthetics, which has invested €40 million in its Capua plant over the past five years.

The second leading export sector to China is the agri-food industry, particularly food, beverages, and tobacco. This sector is a key component of the local economy in Campania, employing approximately 6% of the total workforce and producing a wide range of products with protected or controlled origin marks (DOP, DOC, DOCG, among others). A high concentration of agri-food enterprises is found in the provinces of Naples (45%) and Salerno (25%). The product categories that contribute most significantly to exports include processed and preserved fruits and vegetables (44.7%), baked goods and flour (19.3%), and other food products (15.1%) (data from Sviluppo Campania S.p.A.).

Figure 10: Sectoral export to China from the catchment area (2023)



Source: Authors' elaboration of Coeweb ISTAT data

Table 7: Sectoral export to China from the catchment area (2014-2023)

Export (Mln euro)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Pharmaceuticals	44.7	53.0	78.0	82.4	152.1	156.1	56.9	44.6	31.3	72.5
Agri-food sector	27.4	34.6	42.6	48.0	37.0	37.0	44.8	60.8	62.6	63.3
Mechanical	20.8	37.2	13.0	26.0	17.5	22.5	32.1	32.8	35.2	34.4
Total	247.7	268.6	288.3	342.8	343.1	362.3	321.5	266.2	256.4	283.2
Export (share on total)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Pharmaceuticals	18%	20%	27%	24%	44%	43%	18%	17%	12%	26%
Agri-food sector	11%	13%	15%	14%	11%	10%	14%	23%	24%	22%
Mechanical	8%	14%	5%	8%	5%	6%	10%	12%	14%	12%

Source: Authors' elaboration of Coeweb ISTAT data

In 2023, imports from China to the catchment area were primarily concentrated in three major sectors: chemicals and chemical products, textiles, clothing, leather and accessories, and means of transport.

The chemical products sector dominated imports, accounting for more than 50% of total imports, which corresponds to approximately €3.3 billion. The value of chemical product imports from China began to rise in 2022, driven by inflationary pressures that increased the prices of chemical products – at the EU level, chemical prices surged by over 40% in 2023 compared to 2020 (Unindustria, 2023)⁸. Additionally, this increase may have been influenced by partial supply substitution following the Russo- Ukrainian war and the sanctions imposed on Russia and Belarus.

Other significant import sectors include textiles, clothing, leather and accessories, which accounted for 10% of total imports from China. In the pre-pandemic period, textiles and clothing were the dominant imports from China (around 45% of total imports in 2014). The relevance of this sector has declined over time, with a marked contraction during the 2020–2021 period, when import values decreased from €646 million in 2019 to €467 million in 2021. A partial recovery has been observed in recent years, with imports reaching €576 million in 2023. However, the sector has not yet returned to pre-pandemic levels and no longer represents the main import category, having been overtaken by chemical products.

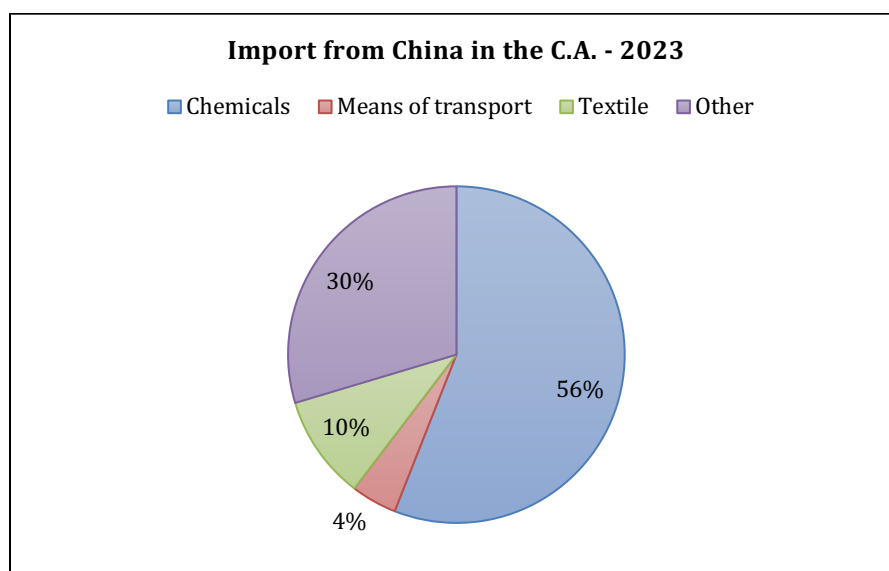
In part, the reduction of textile and clothing products imported might be linked to the trends which have characterized Chinese enterprises on the territory, as highlighted in the previous section. A significant number of Chinese-owned enterprises operating in the wholesale and retail trade sector have ceased their activities in the last years. The

⁸ Unindustria (2023), Monitoraggio sull'andamento dei prezzi delle commodity - Centro Studi Unindustria - maggio 2023. Available at: <https://www.un-industria.it/DwnVer/117233/64672/monitoraggio-sullandamento-dei-prezzi-delle>



closure of several trading activities might have partially impacted the import of products for direct sale to the consumer, as textile and clothing ones.

Figure 11: Sectoral import from China in the catchment area (2023)



Source: Authors' elaboration of Coeweb ISTAT data

Table 8: Sectoral import from China in the catchment area (2014-2023)

Import (Mln Euro)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Chemicals	31.62	34.33	30.09	81.91	141.89	115.97	148.47	423.51	2,161.15	3,230.70
Textile	667.97	692.08	685.22	690.93	618.91	646.87	477.30	467.55	715.50	576.78
Transport	57.46	66.10	56.06	56.55	63.09	61.35	65.24	85.73	87.90	253.79
Total	1,493.58	1,703.03	1,731.84	1,711.45	1,801.75	1,864.10	1,622.75	2,087.90	4,534.08	5,771.32
Import (share on total)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Chemicals	2.1%	2.0%	1.7%	4.8%	7.9%	6.2%	9.1%	20.3%	47.7%	56.0%
Textile	44.7%	40.6%	39.6%	40.4%	34.4%	34.7%	29.4%	22.4%	15.8%	10.0%
Transport	3.8%	3.9%	3.2%	3.3%	3.5%	3.3%	4.0%	4.1%	1.9%	4.4%

Source: Own elaboration of Coeweb ISTAT data



1.2. Demographic Trends

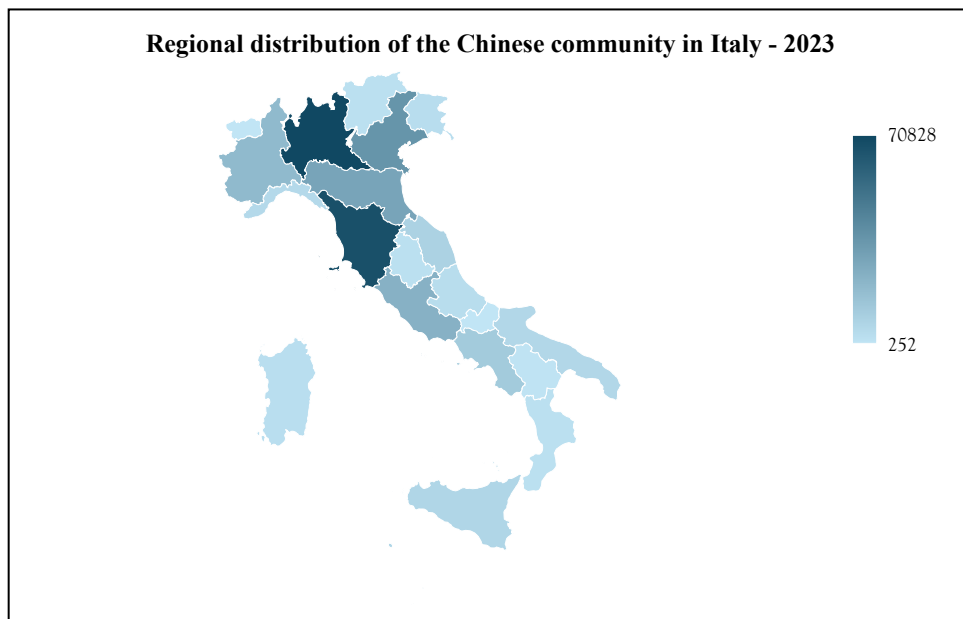
Demographic trends of the Chinese community

To better understand the key trends within the Chinese community in the catchment area, we considered three main aspects: factors: the community's size, demographic changes over recent decades—especially following the COVID-19 pandemic in 2019—and the number of residence permits issued in the region.

Nationally, the Chinese community in Italy numbered approximately 307,000 individuals in 2023. Preliminary data for 2024 shows a slight increase, bringing the total to around 308,000. This makes Chinese citizens the fourth-largest foreign community in Italy, representing 6% of all foreign residents, after Romanians (21%), Albanians, and Moroccans (8% each) (Figure 1). From 2014 to 2023, the Chinese community grew steadily by 24,000 people (+9%), and this trend continued into 2024, with around 2,000 more Chinese citizens moving to Italy.

Geographically, most Chinese nationals in Italy reside in the northern and central regions, which together account for 88% of the total. Lombardy has the largest population, with 70,828 Chinese citizens, or 23% of the total. Tuscany follows with 67,324 residents (22%), and Veneto with 12%. In contrast, the southern regions have a smaller Chinese population, with around 36,000 Chinese residents (12% of the total) in 2023: of these, approximately 12,109 live in Campania.

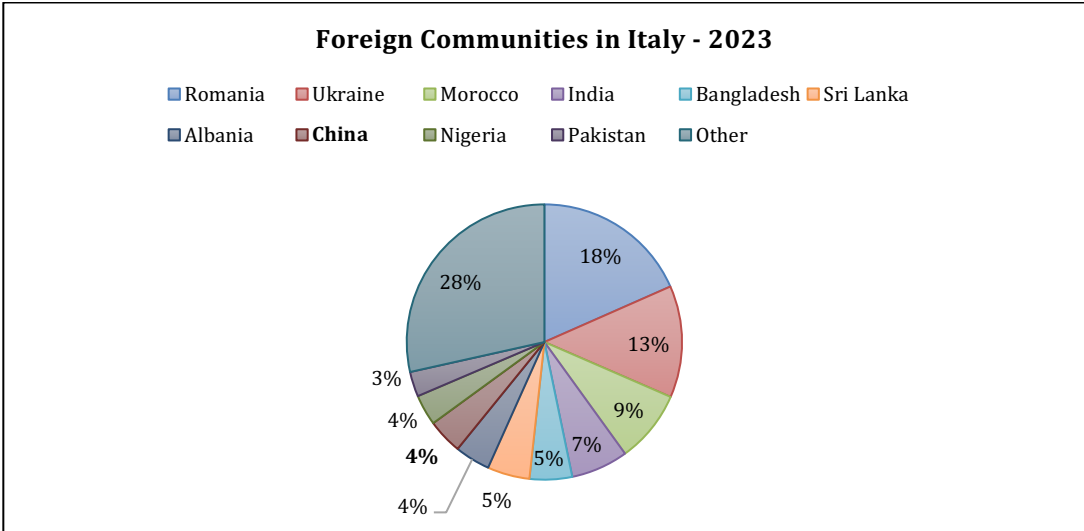
Figure 12: Spatial distribution of the Chinese Community in Italy



Source: Authors' elaboration of ISTAT data

In the catchment area, Chinese citizens make up the eighth-largest foreign community, with 14,080 residents in 2023, accounting for 4.1% of the total foreign population across the eight provinces considered. Although this figure is significantly lower compared to other regions of Italy, the presence of Chinese citizens in the catchment area aligns with the overall trends observed in Southern Italy, where Chinese nationals represent 4.3% of the total foreign community.

Figure 13: Main foreign communities in the catchment area

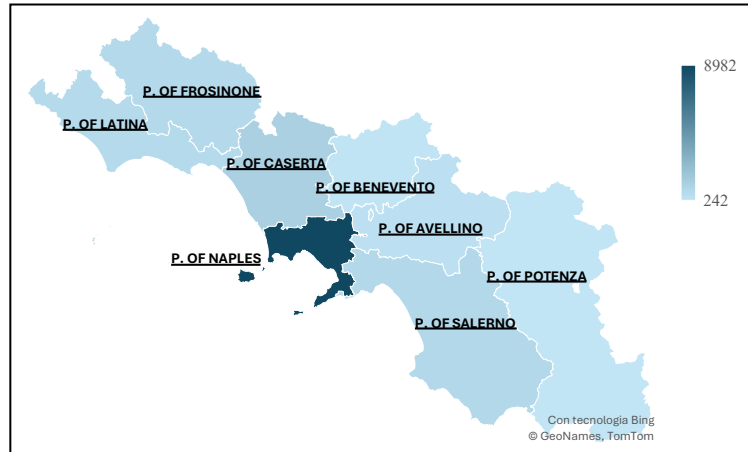


Source: Authors' elaboration on ISTAT data

From a territorial perspective, the largest portion of the Chinese community in the catchment area is concentrated in the province of Naples, which is home to 64% of Chinese residents in the region, totaling 8,982 individuals holding Chinese citizenship in 2023. The provinces of Caserta and Salerno follow as the second and third largest communities, although their numbers are considerably smaller than Naples. Specifically, Caserta is home to approximately 1,390, while Salerno has around 940. The smallest concentration of Chinese citizens is found in the province of Potenza, with only 242 residents, representing 1.7% of the total. Overall, the Chinese community's presence in the region is relatively modest.



Figure 14: Spatial distribution of the Chinese community in the catchment area



Source: Authors' elaboration on ISTAT data

Table 9: Distribution of the Chinese community in the catchment area

Chinese residents		
Province	Number	Share on total
Napoli	8,982	63.8%
Caserta	1,387	9.9%
Salerno	941	6.7%
Frosinone	899	6.4%
Latina	830	5.9%
Avellino	508	3.6%
Benevento	291	2.1%
Potenza	242	1.7%
Catchment area	14,080	100.0%

Source: Authors' elaboration on ISTAT data

Between 2014 and 2023, the number of Chinese citizens in the catchment area exhibited considerable fluctuations, reflecting broader demographic and migration trends (as illustrated in Figure 4). In 2019, the recorded population stood at 14,400, but it peaked at 15,000 in 2021 (+ 4% compared to 2018). However, 2022 saw a notable decrease of 8.2%. This may be due to ongoing global uncertainties, shifts in migration policies, or delays in data reporting to ISTAT. The decline (1,227 individuals) was primarily driven by a significant contraction in the Province of Naples, which lost approximately 760 Chinese residents. With the exception of Caserta and Potenza, which saw minimal changes, all provinces within the catchment area reported reductions in



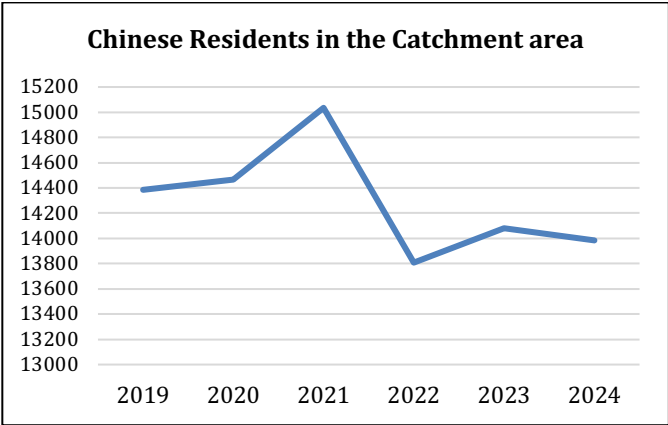
their Chinese populations in 2022, with decreases ranging from 6% to 22%. A slight recovery was observed in 2023 and 2024, with the population surpassing 14,000.



Overall, between 2019 and 2023, the Chinese community in the catchment area experienced a modest reduction of 2.8%. This decline was primarily driven by the decrease in the Neapolitan community, which fell by approximately 909 individuals (-9.3%). This decrease was partially offset by growth in other provinces, which reported a net increase of around 500 residents. Indeed, provinces within Campania saw significant growth in their Chinese populations, ranging from +9% to +60%.

While the overall trend remains slightly negative at the aggregate level, the increase observed in several areas suggests a partial rebalancing of the spatial distribution of the Chinese population within the catchment area and a partial relocation of the Chinese community to cities near Naples, in search of more affordable living conditions, business opportunities, or stronger community networks outside the metropolitan area. The overall decline in the number of Chinese residents in the catchment area contrasts with the national trend, where the Chinese population increased by approximately 9% during the same period.

Figure 15: Number of Chinese citizens in the catchment area



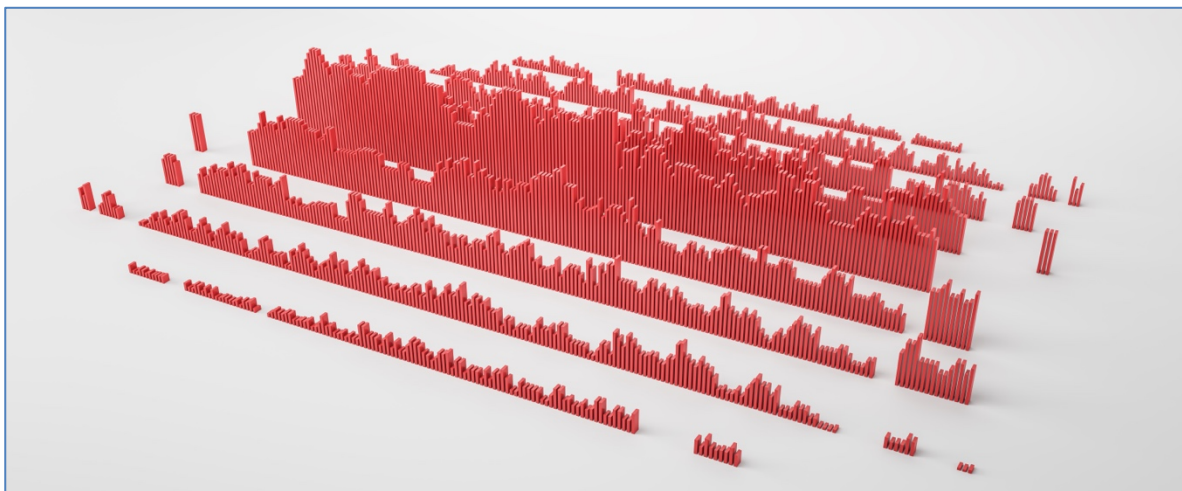
Source: Authors' elaboration on ISTAT data



Table 10: Size and Balance of the Chinese community in the catchment area

Province	2019	2020	2021	2022	2023	2024
Naples	9,769	9,539	9,638	8,882	8,982	8,860
Caserta	1,212	1,242	1,338	1,350	1,387	1,401
Salerno	878	912	951	896	941	958
Frosinone	868	986	1,063	833	899	846
Latina	830	831	892	838	830	832
Avellino	444	499	556	484	508	509
Benevento	201	237	360	284	291	330
Potenza	185	219	237	241	242	246
Province	2020	2021	2022	2023	2024	2019-24
Naples	-2.4%	+1.0%	-7.8%	+1.1%	-1.4%	-9.3%
Caserta	+2.5%	+7.7%	+0.9%	+2.7%	+1.0%	+15.6%
Salerno	+3.9%	+4.3%	-5.8%	+5.0%	+1.8%	+9.1%
Frosinone	+13.6%	+7.8%	-21.6%	+7.9%	-5.9%	-2.5%
Latina	+0.1%	+7.3%	-6.1%	-1.0%	+0.2%	+0.2%
Avellino	+12.4%	+11.4%	-12.9%	+5.0%	+0.2%	+14.6%
Benevento	+17.9%	+51.9%	-21.1%	+2.5%	+13.4%	+64.2%
Potenza	+18.4%	+8.2%	+1.7%	+0.4%	+1.7%	+33.0%
Catchment Area	+0.5%	+3.9%	-8.2%	+2.0%	-0.7%	-2.8%

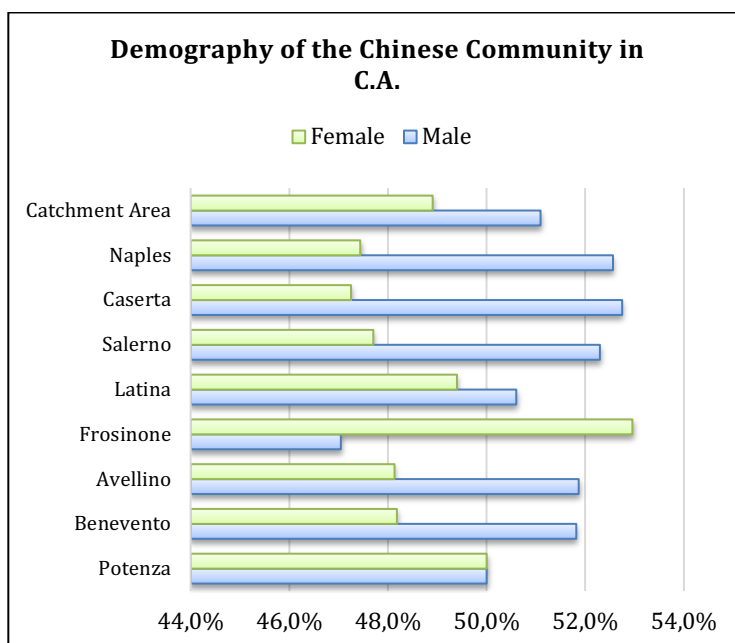
Source: Authors' elaboration on ISTAT data



The demographic composition of the Chinese community in the catchment area reveals a higher proportion of men (52% of the total) in most regions, except for Frosinone, where women outnumber men (Figure 5). Additionally, there has been a

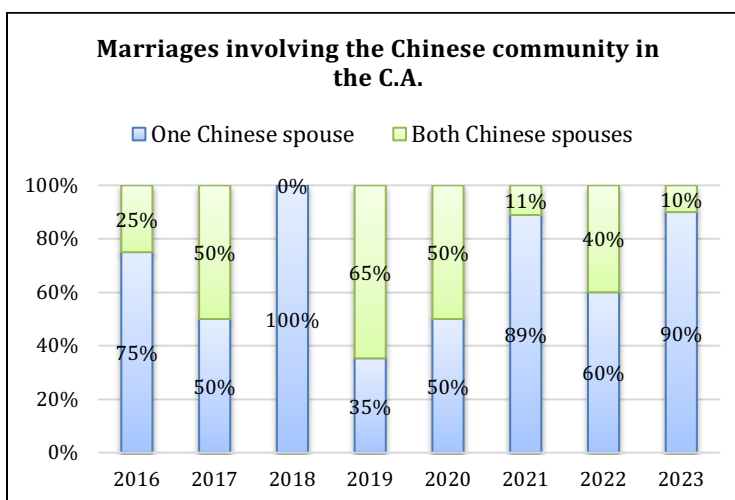
noticeable increase in the number of marriages between Chinese citizens and Italian nationals (Figure 6). This trend can be interpreted as an indication that the Chinese community is gradually adapting to and integrating into the local culture, signaling a growing sense of connection and mutual understanding within the region. This evolving dynamic suggests that the community is not only maintaining its cultural identity but is also forming deeper ties with the broader society.

Figure 16: Demography of the Chinese community in the catchment area



Source: Authors' elaboration on ISTAT data

Figure 17: Marriages between Italian and Chinese spouses



Source: Authors' elaboration on ISTAT data

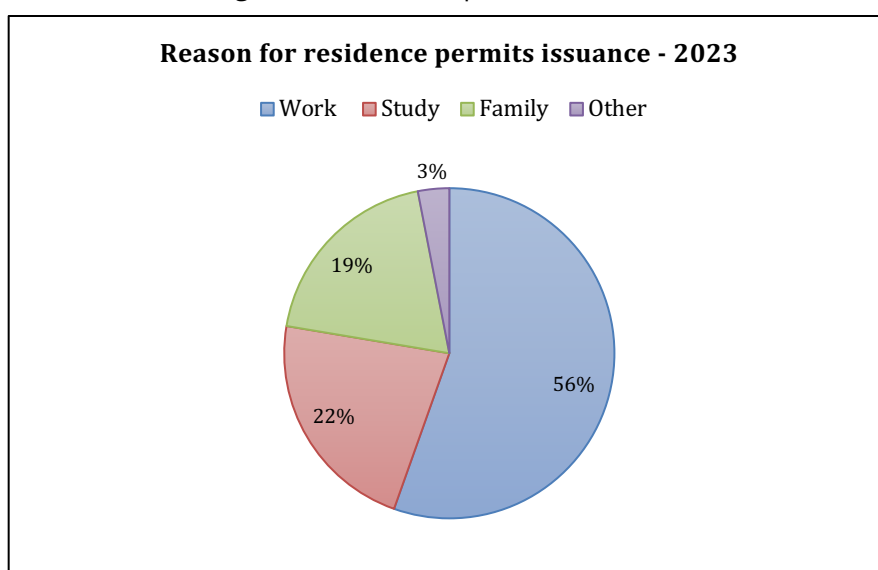


Residence Permits for Chinese Citizens

Although still significantly lower than the pre-pandemic levels, the number of residence permits issued in the catchment area has begun to recover after the sharp decline of the 2020-2021 period. Between 2014 and 2015, approximately 1,400 residence permits were granted annually, with this number dropping to 230 and 330 permits in 2021 and 2022, respectively. According to data from the National Institute of Statistics for 2023, 653 residence permits were issued to Chinese citizens across the eight provinces of the catchment area: the highest number of applications recorded was in Naples (421), followed by Caserta (42) and Frosinone (36).

The primary reasons for residence permit applications in the catchment area in 2023 were work opportunities, educational experiences, and family reunification (Figure 7). These trends suggest a growing integration of the Chinese community into the local population, with individuals seeking to establish long-term connections for professional, educational, and personal reasons. This shift reflects the community's increasing involvement in regional social and economic life.

Figure 18 Residents permits – reasons



Source: Authors' elaboration on ISTAT data

Work-based residence permits

A closer examination of the reasons for residence permits reveals that, despite the relatively small size of the local Chinese community, the catchment area has been appealing to Chinese workers. The number of work-based residence permits has been steadily increasing since 2021, with notable rises in the Provinces of Naples, Caserta, and Salerno. In 2023, the catchment area accounted for 362 work-based residence



permits, representing approximately one-third of the total permits issued in the area. This figure is significant, considering that it corresponds to 26% of the total number of work-related residence permits granted to Chinese citizens in Italy. This is particularly noteworthy given that the catchment area accounted for only 8% of the total residence permits issued in Italy. Over recent years, work-related reasons have consistently been the primary motivation for the issuance of residence permits to Chinese citizens in the catchment area.

Table 11: Residence permits issued for work reasons in Italy and the catchment area

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Latina	11	1	0	2	1	0	19	3	1
Frosinone	0	0	0	0	0	0	3	4	0
Caserta	3	2	0	3	0	0	24	47	23
Benevento	0	1	0	0	0	0	0	1	0
Napoli	162	6	6	9	8	6	31	157	320
Avellino	1	0	1	0	0	0	22	8	5
Salerno	8	1	1	0	1	0	3	5	13
Potenza	0	0	0	0	0	2	4	0	0
Catchment Area	185	11	8	14	10	8	106	225	362
Italy	1,092	488	518	564	274	167	2,654	3,348	1,390

Source: Authors' elaboration on ISTAT data

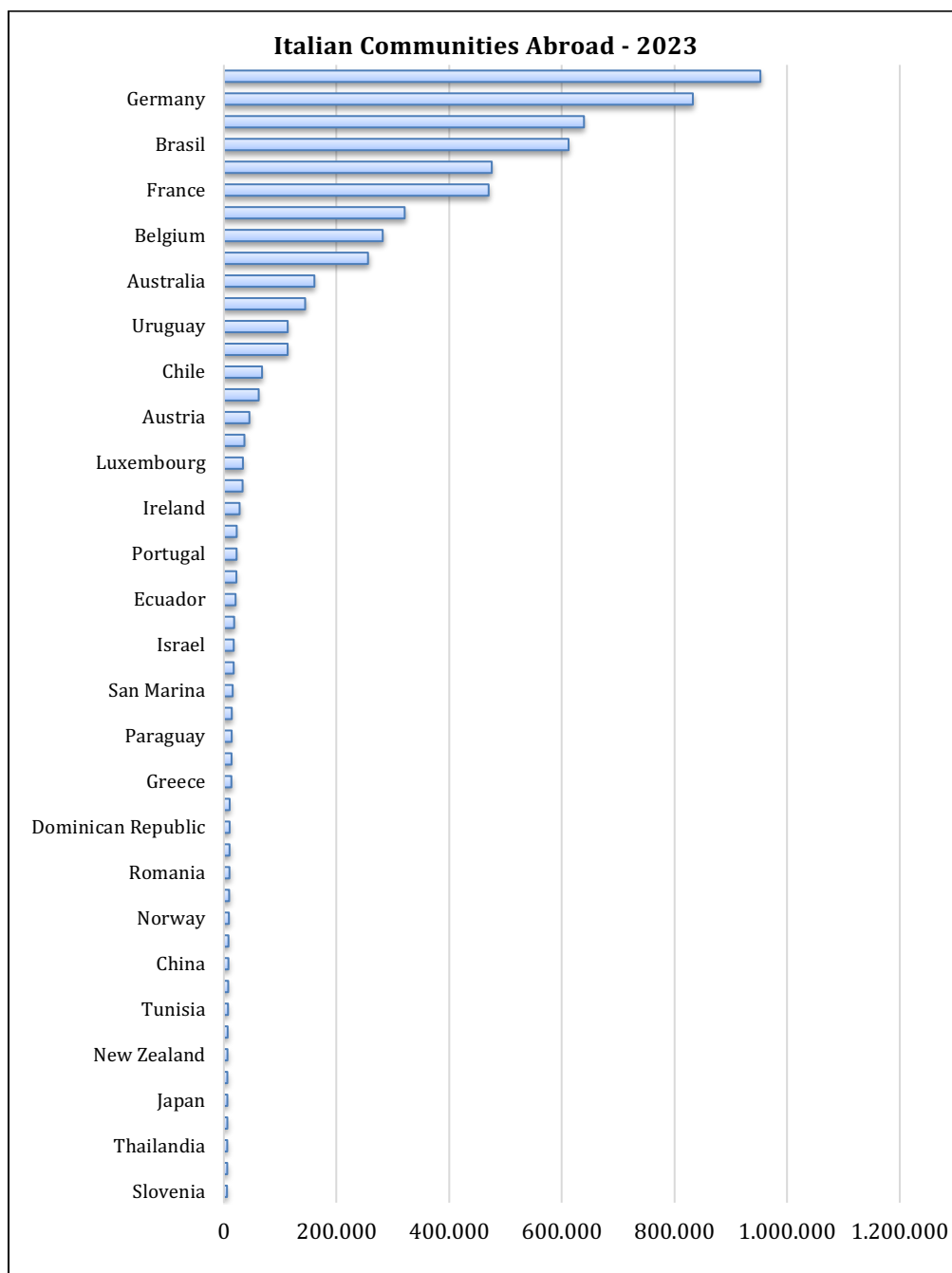
Italian Community in China

This section provides a comprehensive analysis of the Italian diaspora in China, focusing on its size, distribution, and level of integration within Chinese society. The Italian community in China is ranked as the 40th largest Italian community abroad in terms of total population. According to the Register of Italians Residing Abroad (AIRE), the most recent data indicate the presence of 8,017 Italian citizens in China, distributed across 5,294 households.



A declining trend has been observed since 2020 (Figure 19), coinciding with the outbreak of the COVID-19 pandemic. This reduction is consistent with broader disruptions to international mobility and expatriate presence observed during the same period, including restrictions on travel and changes in working arrangements.

Figure 19: Italian community in the world

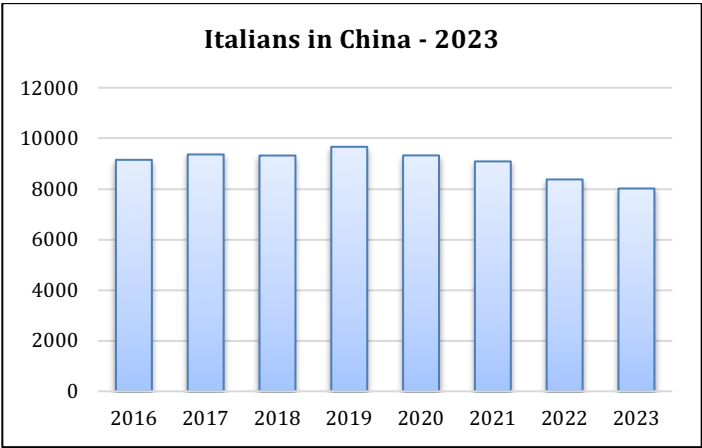


Source: Authors' elaboration on data from the *Register of Italians residing abroad*



It is important to note that China maintained stringent COVID-19 containment measures for a longer period compared to Italy and other European countries, with full border reopening occurring in 2023. This delayed reopening contributed to a partial return of international communities to their home countries. Furthermore, the ability to freely return to China was only granted after December 7th, 2022, which means the process of re-establishing international communities in China remains ongoing as of the most recent data updates. Overall, from 2020 onwards, the Italian community in China experienced a 17% decrease in population, from a peak of 9,665 in 2019 to 8,017 in 2023. This decline mirrors broader trends observed across the foreign population in China, which also experienced a 15% reduction. According to the China National Immigration Administration (NIA), in 2023, immigration authorities across China issued 711,000 resident permits for foreigners, marking a 15% decrease compared to 2019.

Figure 20: Italian Community in China



Italians in China	2016	2017	2018	2019	2020	2021	2022	2023
Number	9,150	9,362	9,320	9,665	9,325	9,087	8,374	8,017
Variation (%)		+2.3%	-0.4%	+3.7%	-3.5%	-2.6%	-7.8%	-4.3%

Source: Authors' elaboration on data from the *Register of Italians residing abroad*

There are no updated data on the distribution of the Italian community in China. Based on the most recent figures, updated in 2014⁹, the majority of Italians residing in China is concentrated in the southern regions, primarily in Hong Kong, Guangdong and surroundings (37% and 13%), as well as in Shanghai and surroundings (34%). The remaining 16% were residing in Beijing and other provinces.

⁹ Project A.MI.CO (Analisi della Migrazione degli italiani in Cina Oggi - Analysis of Italian Migration in China Today) was carried on in 2013-2014 by the "Migrantes" Foundation.

A more recent survey conducted in 2023, based on data from the Register of Italians residing abroad, revealed that most Italian residents in China come from Northern Italy, with 61.8% of the community hailing from regions such as Emilia-Romagna, Lombardy, and Veneto. Italians from Southern Italy and the Islands represent 16.7% of the total flow of Italian migrants to China, with the majority originating from Campania, which accounts for 5.9% of the total Italian population in China (Ny and Vallini, 2023¹⁰).



1.3. Cultural, Academic and Scientific Cooperation

To assess the extent of cultural, academic, and scientific ties between the catchment area and China, as well as the potential appeal of the region for Chinese students or cultural entities, it is essential to consider four key factors: the presence of twinning agreements between cities and institutions in the catchment area and their Chinese counterparts; the enrolment of Chinese secondary school graduates in universities within the catchment area; the existence of academic and research partnerships between Chinese and local educational institutions; and broader initiatives in cultural, scientific, and technological cooperation. These factors provide insights into how cross-border collaboration fosters knowledge exchange, innovation, and cultural relationships.

Twinning Agreements

As of 2024, ten twinning agreements have been established between institutions in the catchment area and their Chinese counterparts. This represents 11% of the community

¹⁰ Ni, Y., & Vallini, L. (2023). "Nuovi" italiani tra Italia e Cina: lingua e identità di una nuova italianità. *Italiano LinguaDue*, 15(1), 288-309.



in the catchment area's Chinese community, which has the highest number of twinning agreements with Chinese cities. These agreements were signed in 1998 with Fujian, 2008 with Zhengzhou, and 2010 with Wenzhou. Other cities in the region, such as Latina (Chaohu and Ningxia), Solofra (Xinji), Avellino (Jiamusi), and Pompei (Xi'an), also have twinning agreements.

Table 12: Twinning agreement in force

Chinese Cities	Italian Cities	Year
Ningxia	Campania	2004
Hubei	Campania	2013
Xinji	Solofra	1997
Fujian	Naples	1998
Chaohu	Latina	2002
Ningxia	Latina	2002
Xi'an	Pompei	2007
Zhengzhou	Naples	2008
Wenzhou	Naples	2010
Jiamusi	Avellino	2011

Source: Authors' elaboration Consulate of China in Milan website¹¹

Academic Relationships and Cooperation

Nine universities are established in the catchment area. Four of them are based in Naples: the University of Naples “Federico II,” the University of Naples “Parthenope,” the University of Naples “L’Orientale,” and the University of Naples “Suor Orsola Benincasa.” The remaining five universities are located in other provinces of the catchment area: the University of Salerno (Salerno), the University of Campania “Luigi Vanvitelli” (Caserta), the University of Sannio (Benevento), the University of Basilicata (Potenza), and the University of Cassino (Frosinone).

In recent years, there has been a significant increase in the number of collaboration agreements for research and student exchange between universities in the catchment area and Chinese academic institutions. These agreements encompass a variety of areas, including student exchanges, research partnerships, and academic programs.

As of 2024, a total of 81 collaboration agreements were established, with Neapolitan universities accounting for the majority (66). Among the universities in Naples, two have signed the largest share of these agreements: the University of Naples “Federico II” (34 agreements) and the University of Naples “L’Orientale” (30 agreements).

¹¹ http://milano.china-consulate.gov.cn/ita/ljzg/202205/t20220518_10687914.htm

The University of Naples "Federico II" is the oldest public university in the world – it was founded in 1224. It hosts nine public-private academies for specialized training in partnership with leading international companies such as APPLE and CISCO, along with one of Italy's foremost international schools for advanced training and research.

Meanwhile, the University "L'Orientale" is a symbol of Naples' long-standing historical and cultural ties with Eastern Asia. Established in 1732 as the Chinese College by Matteo Ripa, a lay priest and missionary who served at the court of the Qing Emperor Kangxi, it remains the oldest school of Oriental Studies in Europe. L'Orientale has been instrumental in promoting cross-cultural understanding, particularly in the areas of languages, cultural studies, and social sciences, linking Europe with Asia, Africa, and the Americas.

Between 2014 and 2024, 255 students from China participated in exchange programs at the University of Naples "L'Orientale," while 186 students from the catchment area spent time studying in China. The increasing number and scope of academic collaborations underscore Naples' growing role as a centre for international academic partnerships, particularly with Chinese institutions.

Table 13: Cooperation Agreements between Chinese and local Universities

Location	University	N. of Agreements
Province of Naples	University of Naples "Federico II"	34
Province of Naples	University of Naples "L'Orientale"	30
Province of Naples	University of Naples "Suor Orsola Benincasa"	1
Province of Naples	University of Naples "Parthenope"	1
Province of Caserta	Vanvitelli	4
Province of Salerno	University of Salerno	4
Province of Benevento	University of Sannio	2
Province of Potenza	University of Basilicata	1
Province of Frosinone	University of Southern Lazio - Cassino	4
Total		81

Source: Authors' elaboration on Universities' websites

On the Chinese side, academic collaboration with Italian institutions is particularly strong in provinces and municipalities that play a key role in China's educational and economic landscape. Universities in Beijing and Shanghai stand out, with 14 (16.67%) and 9 agreements (10.71%), respectively. These regions are major hubs for higher education and research, hosting prestigious institutions such as Peking University, Tsinghua University, Fudan University, and Shanghai Jiao Tong University. Their international outlook and strong governmental support position them as central to academic exchanges, particularly in social sciences, technology, and innovation.



Provinces close to Beijing, such as Tianjin, hold 3 agreements (3.57%), while Jiangsu and Zhejiang each hold 8 agreements (9.52%). These regions are critical to China's economic and technological development, with advanced research institutions like Nanjing University and Zhejiang University. They lead in fields such as engineering, environmental science, and materials research.

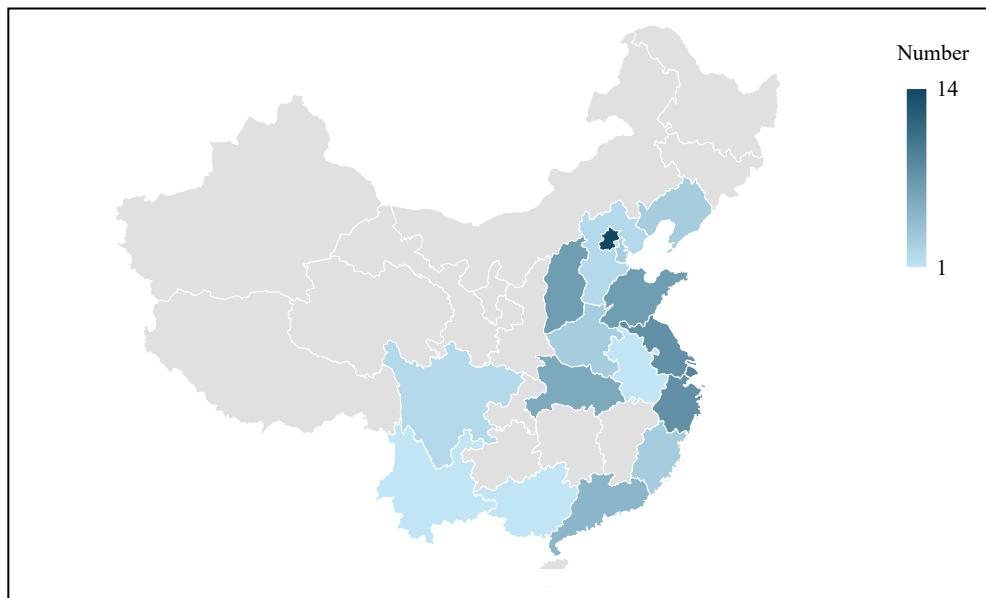
Guangdong, with its innovation-driven economy, holds 5 agreements (5.95%), and is a significant player in research on business, technology, and digital governance. Shandong, with 6 agreements (7.14%), has a strong industrial base that supports academic cooperation in engineering and manufacturing. Sichuan, home to Sichuan University, holds 2 agreements (2.38%) and specializes in energy, environmental science, and regional studies.



Other provinces also contribute to Sino-Italian academic collaboration. Hubei holds 6 agreements (7.14%) and Henan 3 (3.57%), reflecting their strengths in agricultural science, environmental engineering, and medical research. Additionally, Shaanxi holds 7 agreements (8.33%), Fujian holds 3 (3.57%), Liaoning holds 3 (3.57%), Hebei holds 2 (2.38%), Anhui holds 1 (1.19%), Guangxi holds 1 (1.19%), Yunnan holds 1 (1.19%), and Hong Kong holds 2 (2.38%). These agreements further expand the network of academic ties between China and Italy, contributing to broader collaboration.



Figure 21: Number of Agreements with Universities in the catchment area in Chinese Provinces



Source: Authors' elaboration on Italian Universities websites

Chinese Students in Universities of the Catchment Area

Regarding the attractiveness of local universities, data from the Italian Ministry for University and Research on the number of students enrolling in Italian universities after obtaining their secondary school diploma abroad reveal that, in recent years, universities in the catchment area have struggled to attract students from China.

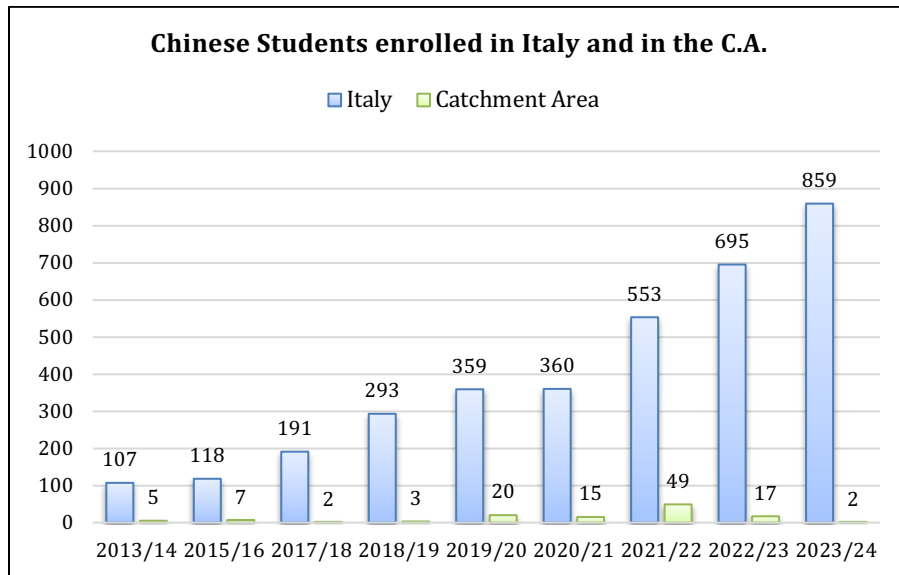
The number of Chinese students studying in Italian universities has steadily increased since the beginning of the observation period. In the academic year 2013/2014, 107 Chinese students registered to pursue their studies in Italy. By the academic year 2023/2024, this number had increased eightfold, with 859 Chinese students enrolling in Italian universities.

Within the catchment area, the number of Chinese students enrolling in local universities showed a modest increase until the academic year 2021/2022, when approximately 50 students enrolled across the nine universities in the region, representing about 9% of the total number of Chinese students in Italy. However, this number significantly decreased in the following year, with only two students enrolling in the 2023/2024 academic year.

This data indicates that, following the COVID-19 pandemic, the catchment area has seen a marked decline in its appeal to Chinese students when compared to the rest of Italy's universities.



Figure 22: Number of students with a Chinese diploma



Source: Authors' elaboration on MUR data

Cultural, Scientific, and Technological Exchange

This section outlines key initiatives in cultural, scientific, and technological cooperation, including trade fairs, exhibitions, and reciprocal promotional activities that foster mutual understanding and collaboration between Naples (NAP) and China.

Naples plays a crucial role not only within the Campania region but also in Italy's national cooperation with China, serving as a strategic hub for scientific, technological, and cultural exchange. The agreements discussed in this section are the direct result of a significant event in Italy-China scientific and technological cooperation. In 2013, an agreement was signed between the Italian Ministry of Education, University and Research, the Ministry of Economic Development, the Ministry of Foreign Affairs, ICE-Agency for the promotion and internationalization of Italian companies, the Agency for Digital Italy, and Città della Scienza in Naples. This led to the establishment of Italy-China Week, a key event planned and coordinated by Città della Scienza, which is based in Naples. The event brings together two major initiatives: the "Sino-Italian Exchange Event (SIEE)," established in 2007 in Naples through the collaboration of Città della Scienza, the Campania Region, the Beijing Association for Science and Technology (BAST), and the Beijing Municipality, and the "China-Italy Innovation Forum (CIIF)," launched in 2010. The CIIF is promoted by the Italian Ministry of University and Research and coordinated by Città della Scienza alongside the National Research Council (CNR), involving universities, research institutes, innovative companies, and technology clusters.





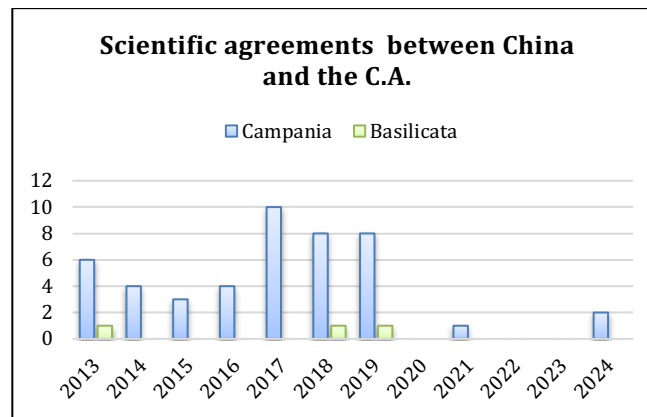
On the Chinese side, the event is promoted by the Ministry of Science and Technology and coordinated by the Beijing Municipal Science and Technology Commission (BMSTC) through the Beijing Technology Exchange & Promotion Center (BTEPC) until 2019. Since 2020, it has been coordinated by the Zhongguancun Overseas Science Park (ZOSP). These initiatives underscore Naples' pivotal role in fostering bilateral cooperation, solidifying its position as a cornerstone of Italy-China relations at both regional and national levels. While organizing such events became notably challenging in the aftermath of COVID-19, recent data indicates a promising recovery, suggesting a gradual resurgence in scientific and technological cooperation between China and the catchment area.

Between 2013 and 2024, a total of 52 agreements were signed across various cities and regions. Of these, 73.1% were established in Naples, positioning it as the primary hub for collaboration. The Campania Region followed with 6 agreements (11.5%), while the Calabria Region secured 4 agreements (7.7%). Capua and the Basilicata Region each recorded 2 agreements (3.8%), and Matera had 1 agreement (1.9%). The distribution of agreements over the years reveals notable fluctuations. The highest number of agreements occurred in 2017 and 2019, with 10 agreements each, accounting for 19.2% of the total. This period marks a peak in collaborations, driven largely by Naples and the surrounding Campania Region. In contrast, the years 2013 and 2014 recorded fewer agreements, with 8 and 5, respectively. The trend remained stable between 2015 and 2016, with 4 agreements per year. However, after 2019, a sharp decline occurred, with only 1 agreement in 2021 and 2 in 2024, signalling a significant slowdown in partnership activity.

Throughout these years, Naples consistently maintained a dominant role, particularly during the peak period from 2017 to 2019. While the other areas of Campania and Calabria contributed to the overall total, their impact was far less significant. The data highlights Naples's central role in fostering these agreements, while locations such as Capua and Basilicata played a minor but consistent role. The post-2019 decline in agreements raises questions about potential shifts in collaboration strategies or external factors influencing these partnerships.

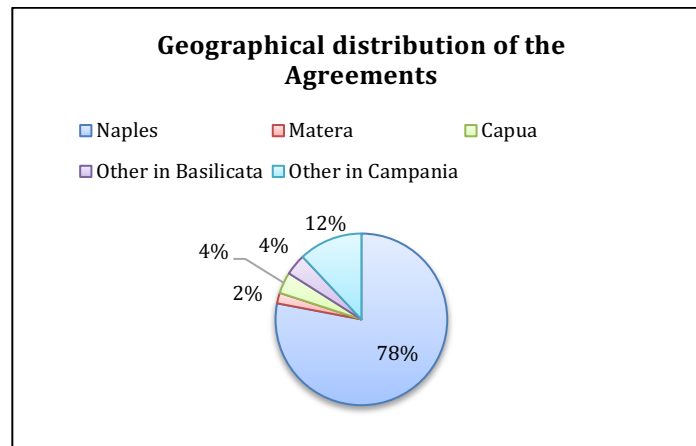


Figure 23: Scientific and Technological agreements between China and the catchment area



Source: Authors' elaboration on data drawn from Città della Scienza reports

Figure 24: Territorial distribution of S&T agreements



Source: Authors' elaboration on data drawn from Città della Scienza reports

Between 2014 and 2024, the number of participants in annual events fluctuated significantly, with some years experiencing high attendance and others seeing declines due to external factors, such as the COVID-19 pandemic. In 2014, the event attracted 750 participants, with a steady increase over the following years. By 2015, attendance surged to 1,800, more than doubling from the previous year. This upward trend continued in 2016, reaching 2,150 participants, one of the highest attendance figures. However, no data is available for 2017, creating a gap in the analysis.

In 2018, attendance slightly decreased to 1,470 participants, a trend that continued in 2019, with 2,000 attendees. This indicated that interest in the event remained relatively stable despite previous fluctuations. The pandemic in 2020 and 2021 led to the cancellation of in-person events, and no participation data is available for those



years. In 2022, the event shifted to an online format due to ongoing restrictions. While specific participant numbers for the virtual edition are not available, it is clear that this transition to online events impacted physical attendance figures.

The event returned to an in-person format in 2023, with 1,000 participants, but in 2024, attendance sharply declined to 500. This decline from the peak years may be attributed to lingering post-pandemic challenges, shifts in interest, or other external factors, such as changes in collaboration dynamics and participation. Despite these fluctuations, the event's attendance trajectory highlights both its potential for significant engagement and the challenges posed by global events like COVID-19.

Table 14: Participants at "China-Italy Science, Technology and Innovation Week"

Year	City	N. Participants
2024	Naples	500
2023	Beijing	10,000
2022	Naples	Online
2021	-	-
2020	-	-
2019	Beijing	2,000
2018	Naples	1,470
2017	Beijing	-
2016	Naples	2,150
2015	Beijing	1,800
2014	Naples	750

Source: Authors' elaboration on data drawn from Città della Scienza reports

Cultural activities referring to the Catchment area in China

Among the cultural and artistic exhibitions showcasing the history and art of Naples in China, the following are notable:

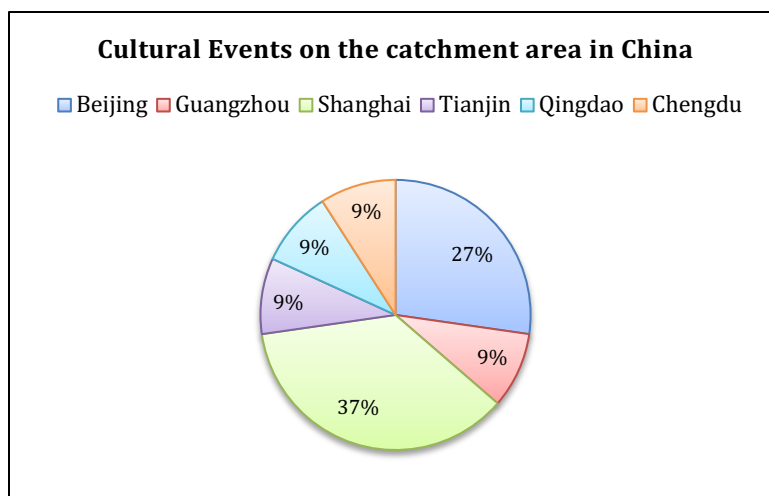
1. "Exquisite Beauty: Treasures from the National Archaeological Museum of Naples" (December 21, 2022 – April 9, 2023, Museum of Art Pudong, Shanghai) – Part of the 2022 China-Italy Year of Culture and Tourism series, this exhibition features a selection of the National Archaeological Museum of Naples' finest collections, highlighting the essence of ancient Greco-Roman aesthetics¹².

¹² Shanghai Italian Cultural Institute (2022), *A World of Beauty. Masterpieces from the National Archaeological Museum of Naples*, available at: https://iicshanghai.esteri.it/it/gli_eventi/calendario/a-world-of-beauty-masterpieces/



2. "Encounters in the Aegean Sea: The Essence of Cultural Relics from the National Archaeological Museum of Naples" (March 12, 2024 – March 13, 2025, Sanshan Wuyuan Culture and Art Center, Beijing) – This exhibition includes two major displays: the "Ancient Greece Exhibition," focusing on cultural relics from the National Archaeological Museum of Naples, and "Yuanming: Fusion - The Exhibition of Research Results of the Old Summer Palace"¹³.
3. "The Art of the Roman Empire – Masterpieces from the National Archaeological Museum of Naples" (June 21, 2024 – October 30, 2024, Guangdong) – Featuring a selection of Roman treasures from Pompeii, Herculaneum, and the Farnese family, this exhibition includes sculptures, frescoes, mosaics, silverware, and glassware, with highlights like the "Venus on the Throne" fresco and Jupiter busts, among others¹⁴.
4. "The Light of Ancient Roman Civilization: Masterpieces from the National Archaeological Museum of Naples" (June 10, 2023 – October 8, 2023, World Art Museum, Beijing) – This exhibition presents iconic masterpieces from the National Archaeological Museum of Naples, offering deep insight into Roman civilization¹⁵.

Figure 25: Cultural activities on the catchment area in China



Source: Authors' elaboration on data provided by the online website of each organizer

¹³ Sānshān wǔ yuán wénhuà yìshù zhōngxīn shǒucì duì gōngzhòng kāifàng shì yùnxíng 三山五园文化艺术中心首次对公众开放试运行 [Sanshan Wuyuan Cultural and Art Center is open to the public for trial operation for the first time], Haidian District People's Government of Beijing Municipality, December 4, 2024, available at: https://zyk.bjhd.gov.cn/ywdt/hdywx/202412/t20241204_4742300.shtml

¹⁴ *Masterpieces of British design and exquisite artifacts from the Roman Empire are on display at the Guangdong Museum*, Guangzhou International, June 25, 2024, available at: https://www.gz.gov.cn/guangzhouinternational/home/whatson/whatson/content/post_9729438.html

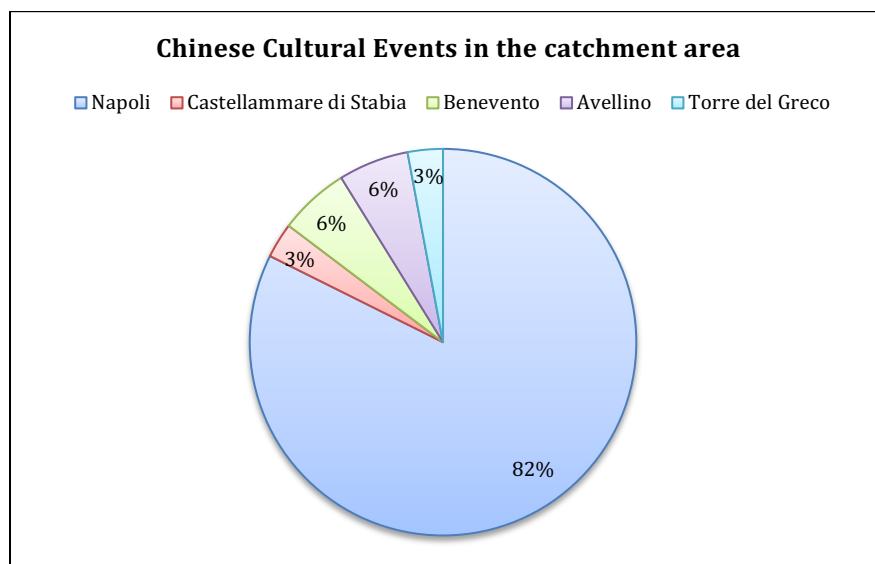
¹⁵ *Masterpieces Exhibition of National Archaeological Museum of Naples Opens in Beijing*, Beijing News, June 27, 2023, available at: https://english.beijing.gov.cn/consuminginbeijing/news/202306/t20230627_3147464.html



Cultural activities about China in the catchment area

The Confucius Institute in Naples, known as *Istituto Confucio di Napoli*, plays a crucial role in promoting Chinese language and culture within the region, fostering cross-cultural understanding and collaboration. Through a wide array of activities, including language courses, cultural workshops, and exchange programs, the institute has become a central hub for cultural dialogue and learning. One of its key initiatives is the "*Language Exchange | Conversazioni in cinese*" which offers local residents the opportunity to practice Chinese and engage in meaningful cultural exchanges. In addition to its presence in Naples, the institute extends its influence to surrounding areas such as Castellammare di Stabia, Benevento, Avellino, and Torre del Greco, thereby expanding its reach and impact.

Figure 26: Chinese Cultural Events in the catchment area



Source: Authors' elaboration on data drawn by the Istituto Confucio di Napoli online website

Between 2014 and 2024, three major exhibitions showcasing Chinese culture were held in Naples:

1. The "Yang Xianfei: The Gate of Dunhuang" exhibition, held from October 12 to October 31, 2016, featured the works of Yang Xianfei, inspired by the ancient frescoes of the Mogao Caves. These caves preserve archetypes of spiritual and philosophical thought from ancient China. Through a contemporary reinterpretation of these iconographies, the artist created a dialogue between the past and present, reviving meaningful forms, colors, and symbols¹⁶.

¹⁶ Yang Xianfei. *The Dunhuang Gate*, Arte.it, available at: <http://www.arte.it/calendario-arte/napoli/mostra-yang-xianfei-la-porta-di-dunhuang-31741>



2. The "Terracotta Army" exhibition, which ran from October 24, 2017, to July 1, 2018, attracted over 50,000 visitors¹⁷. It showcased 170 life-sized terracotta warriors - each wearing the garments of soldiers, including armor and footwear¹⁸ - in the nave of the Basilica dello Spirito Santo on Via Toledo, in Naples. These warriors are part of the famous "Terracotta Army" guarding the mausoleum of Qin Shi Huang in Xi'an, China, and represent a small section of the 8,000 statues designed to protect China's first emperor.
3. The "Mortal Immortals" exhibition, which featured artifacts from the ancient Shu Kingdom, was held at the National Archaeological Museum of Naples from December 14, 2018, to March 11, 2019. Although specific visitor numbers for this exhibition are unavailable, the museum's overall attendance in 2019 reached a record 673,000, marking a 10% increase from 2018¹⁹, thus suggesting that approximately 150,000 to 170,000 visitors might have attended the museum during the exhibition's three-month run. However, this estimate accounts for total museum attendance, not just visitors to the "Mortal Immortals" exhibition.

¹⁷ De Luca, P., *50 thousand visitors to the terracotta warriors exhibition. Extension until April*, la Repubblica, January 23, 2018, available at: https://napoli.repubblica.it/cronaca/2018/01/23/foto/50_mila_visitatori_per_la_mostra_dei_guerrieri_di_terracotta_proroga_fino_ad_aprile-187130161/1/

¹⁸ *China's Terracotta Army on display in Naples*, Napoli da Vivere, October 29, 2017, available at: <https://www.napolidavivere.it/2017/10/29/lesercito-di-terracotta-della-cina-in-mostra-a-napoli/#:~:text=La%20Cina%20di%202000%20anni,dei%20soldati%2C%20armature%20e%20calzari>

¹⁹ *Naples, National Archeological Museum sets record: 673,000 visitors in 2019*, Finestre sull'Arte, January 4, 2020, available at: <https://www.finestresullarte.info/en/news/naples-national-archaeological-museum-sets-record-673-000-visitors-in-2019>



2. Chinese Tourism

Enrico Maria Fardella, Antonio Barreca, Raffaele Boffardi, Miriam Verzellino

The year 2023 was the year of the recovery of outbound Chinese tourism after the outbreak of the coronavirus pandemic in January 2020. The onset of the pandemic halted the Chinese tourism market for more than two years: from January 27, 2020, when the Chinese government banned the sale of tourist packages and group travel abroad, to December 7, 2022, when the abandonment of the zero-COVID policy was announced. As for Italy, it was included in the list of authorized destinations for group travel on March 15, 2023²⁰.

According to China's Outbound Tourism Industry Development Report 2024, the number of tourists choosing foreign countries as main destinations for their travel exceeded 87 million in 2023 (China Tourism Research Institute, 2024). Despite this recovery, 2023 was a challenging year for outbound Chinese tourism: the first phase of the year was marked by optimism following the reopening of China's borders, while the second half witnessed a more cautious assessment regarding the return of tourists to Europe.

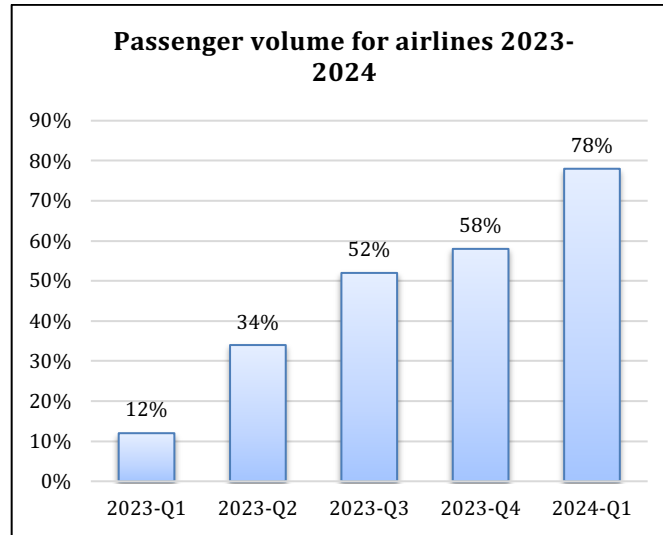
Since 2023, alongside the growth in cross-border travel demand and the efforts by the Chinese civil aviation sector to promote international flights, international passenger traffic in the first quarter of 2024 reached 78% of 2019 levels. Concerning Europe, in 2024, Chinese tourism to Europe experienced a robust resurgence, nearing pre-pandemic levels. Notably, while destinations such as the Netherlands, Norway, Finland, Croatia, Hungary, and the Czech Republic saw significant Chinese tourist influxes, Italy did not feature prominently during this period. Despite this, Italy's potential to attract Chinese tourists remains exceptionally high. Studies indicate that 81% of Chinese travelers plan to visit Europe in the coming months. Italy is the third most popular destination due to its renowned shopping and cultural experiences.



²⁰ ENIT (2023). Nuovi trend del turismo cinese ed evoluzione del mercato [Cristiano Varotti - ENIT - China Country Manager]. Available at: https://www.enit.it/storage/202304/20230428133800_nuovi%20trend%20del%20turismo%20cinese%20ed%20evoluzione%20del%20mercato%20-%20cristiano%20varotti%20-%202020%20aprile%202023.pdf



Figure 27: Passenger volume for airlines 2023-2024



Source: Authors' elaboration on InChina Monitor (2024)²¹

Destinations in the Asia-Pacific region have shown strong recovery, particularly Japan, which has become increasingly attractive due to its affordability, making it a popular choice for Chinese travelers seeking shopping opportunities.

However, Chinese tourists' interest extends beyond Asia, with Europe emerging as the favored destination for longer trips. This attraction depends on several factors: history and culture, luxury shopping opportunities, and the chance to experience unique culinary and wine traditions. After the pandemic, tourists have increasingly prioritized experiences like authentic cultural immersion and gastronomic and outdoor activities (such as trekking and excursions in high-value natural areas), which have become a new must (InChina Monitor Report, October 2024).

Moreover, large-scale events are significant attractors for Chinese tourists. The Ctrip platform has reported a significant increase in long-haul travel to Europe during the summer period, also driven by the occurrence of events such as the UEFA European Championship 2024 and the Paris Olympic Games (InChina Monitor Report, October 2024). Indeed, between July 24 and August 11, bookings for domestic flights to Europe saw an increase of approximately 89% compared to the previous year. Additionally, in anticipation of the EURO Cup 2024, flight bookings to Germany also surged by 80% compared to 2023 (Ctrip data reported by InChina Monitor Report, 2024)²².

²¹ InChina Monitor (2024), *Monitor 8: Conquistare i turisti cinesi nel 2025*. Available at: <https://www.intar.get.net/in-china/monitor/>

²² Ibid.



In the longer term, the Italian National Agency for Tourism (ENIT), in a recent survey on travelers, found that 20% of respondents with previous outbound experiences were ready to visit Europe in 2023. Moreover, encouraging data emerged from this study, with 28% of respondents planning to arrange a European journey for 2025.

2.1. Chinese Tourism in Italy

Presence of Chinese tourists

In 2023, the total number of tourist arrivals in Italy reached and surpassed pre-pandemic levels, with 234 million arrivals recorded, compared to 221 million in 2019. The main segment, consisting of tourists from the European Union (159 million, 67.6% of the total), had already returned to pre-COVID levels by 2022. In contrast, the number of arrivals from non-European countries remained significantly lower than the record 50 million arrivals seen in 2019, reaching only 36 million in 2022, with full recovery occurring only in 2023 (54.8 million arrivals).

Regarding Chinese tourism, before the pandemic, the number of Chinese visitors to Italy had steadily increased from 3.5 million in 2014 to 5.4 million in 2019. Between 2020 and 2022, this figure remained between 400,000 and 800,000 annually, but in 2023, the number of Chinese tourists in Italy surged to 2.5 million. Although this figure represents a substantial recovery compared to the pandemic years, it is still less than half of the number recorded in 2019 and remains well below the 2014 figure. The recovery of Chinese tourism was delayed due to the strict pandemic containment measures maintained by the Chinese government, which, unlike most other governments globally, kept these measures in place throughout 2022. The relaxation of anti-COVID restrictions, coupled with the end of the Zero-COVID policy, has given new momentum to Chinese tourism to Europe and Italy.



In 2023, as tourism rebounded, China ranked 23rd among countries for tourist arrivals, representing 1.1% of the total. While this marks an improvement compared to 2021 and 2022, when Chinese visitors accounted for just 0.4% of all arrivals, it underscores a significant shortfall relative to 2019, when Chinese tourists ranked 11th among the largest international groups visiting Italy. According to the *InChina Monitoring Report* for 2024, the number of Chinese passengers returning to Italy in 2024 has finally surpassed pre-pandemic numbers.

Table 15: Chinese tourists in Italy

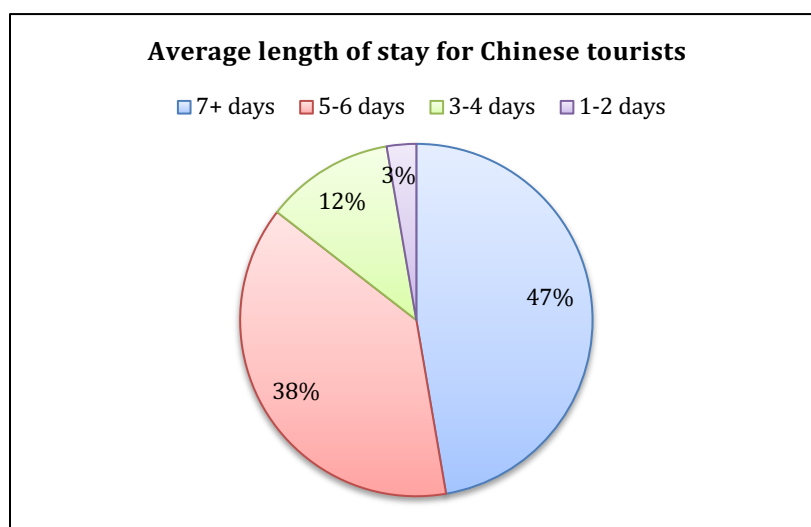
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
N. of presence (Mln)	3.5	5.4	4.5	5.0	5.3	5.4	0.6	0.4	0.8	2.5
Variation (%)	-	+54%	-17%	+11%	+6%	+2%	-89%	-33%	+100%	213%
Share on total	1.9%	2.8%	2.2%	2.4%	2.4%	2.4%	0.9%	0.4%	0.4%	1.1%

Source: Authors' elaboration on ISTAT data

Main characteristics of Chinese tourism

In terms of the average length of stay in Italy, around 80% of Chinese travelers stay in the country for seven or more days (47.3%) or, at least, for five days (38.2%). Shorter durations, especially those under four days, are considerably less attractive (16%) for Chinese tourists.

Figure 28: Average length of stay for Chinese tourists



Source: Authors' elaboration on Outbound Chinese Travelers Research (ENIT)²³

²³ ENIT (2023). Outbound Chinese Travelers Research – Italy (2023.04). Available at: https://www.enit.it/storage/202304/20230428133914_outbound%20chinese%20travelers%20research%20-%20elena%20di%20raco%20-%202020%20aprile%202023.pdf



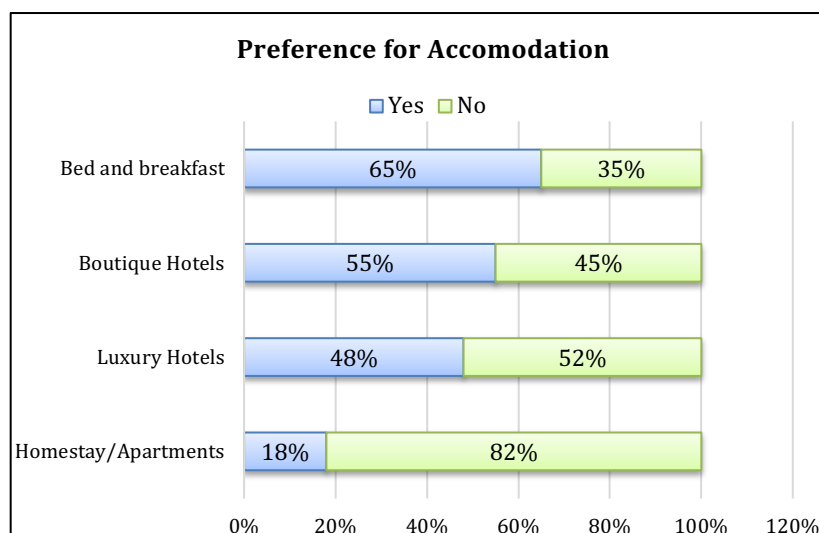


The preferred accommodation types for Chinese tourists in Italy comprehend:

- Bed and Breakfasts (65%) – mostly due to the comfort and the value for money,
- Boutique hotels (55%) – signalling a remarkable interest in accommodations with unique and personalized design
- Luxury Hotels (45%) – as a sign of high purchasing power in the premium segment.

Local Homestay and Apartments are considered preferable choices for a lower share of Chinese tourists (18%), even compared to tourists from other countries.

Figure 29: Preference for Accommodation



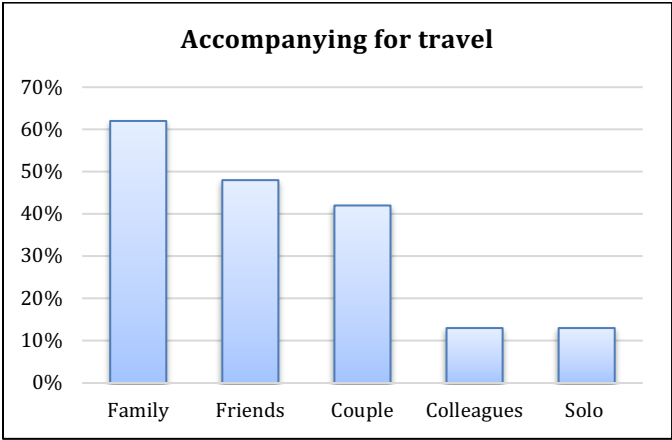
Source: Authors' elaboration on Outbound Chinese Travelers Research (ENIT)²⁴

²⁴ENIT (2023). Outbound Chinese Travelers Research – Italy (2023.04). Available at: https://www.enit.it/storage/202304/20230428133914_outbound%20chinese%20travelers%20research%20-%20elena%20di%20raco%20-%202020%20aprile%202023.pdf



According to a survey conducted by the Italian National Agency for Tourism (ENIT) on a sample of outbound travellers, nearly two-thirds (62%) of Chinese tourists travel to Italy with families, including spouses, children, and/or parents. Travelling with friends (48%) and as a couple (42%) were also popular choices, while only 13% expressed willingness for solo travel.

Figure 30: Accompanying for travel



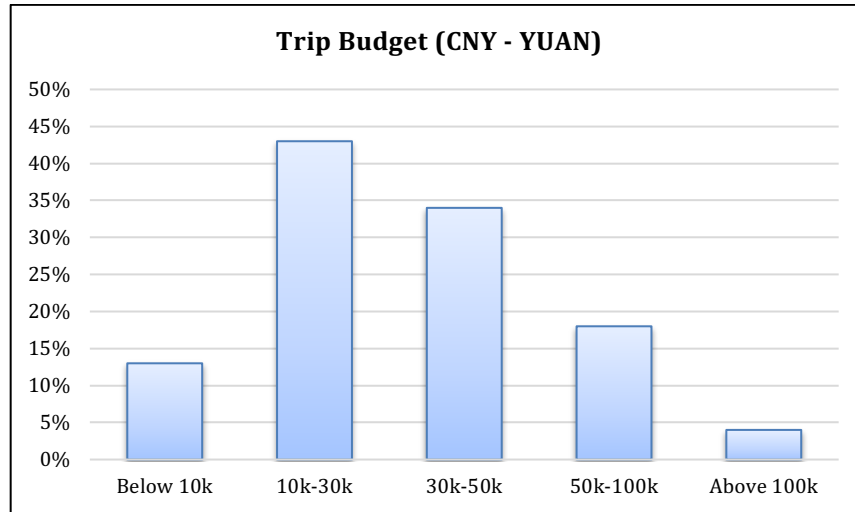
Source: Authors' elaboration on Outbound Chinese Travelers Research (ENIT) ²⁵

According to data on tax-free shopping recorded in 2024 by *InChina Monitoring Report*, the Chinese tourist tends to be a relatively young traveller, with 68% under the age of 44 (a 7% increase compared to 2019), and shows a strong preference for shopping in the fashion and clothing sector (78%, +4% compared to the pre-pandemic period), a category that has registered the highest recovery rate compared to 2019 (62%).

The *InChina Monitoring Report* depicts a Chinese client with relatively high spending power, with an average budget (excluding flights) of approximately €6650: indeed, 18% of the potential Chinese tourists surveyed by ENIT report an intention to spend between €6650 and €13,000 (50,000-100,000 CNY), while 4% plan to spend more than €13,000 (more than 100,000 CNY). The average spending per Chinese traveller has significantly increased over time, particularly in the fashion and clothing sector, where it stands at around €1440, marking a +43% increase compared to 2023 (€1005). There is a concentration of spending among the so-called Millennials (average of €3590). Luxury products are particularly favoured, with average spending rising from €1883 in 2023 to €2669 in 2024, an increase of +42%. Italy and Italian brands are gradually establishing themselves as one of the preferred destinations for luxury tourism and shopping among Chinese tourists. Evolving Chinese travelers are increasingly seeking unique experiences that combine the beauty of Italy's cities and villages with the quality of Made in Italy products.

²⁵ Ibid.

Figure 31: Trip Budget



Source: Authors' elaboration on Outbound Chinese Travelers Research (ENIT)

Chinese travelers' opinions and reasons for traveling to Italy

According to the survey conducted by the Italian National Agency for Tourism (ENIT)²⁶, Italy is considered the most attractive European destination for Chinese tourists (38%), with Switzerland (35%), France (31%), Germany and Greece (23%) following. The survey highlighted high appreciation levels for Italy among Chinese tourists, with 97% of those interviewed who had already visited Italy declaring that they would have liked to visit Italy again.

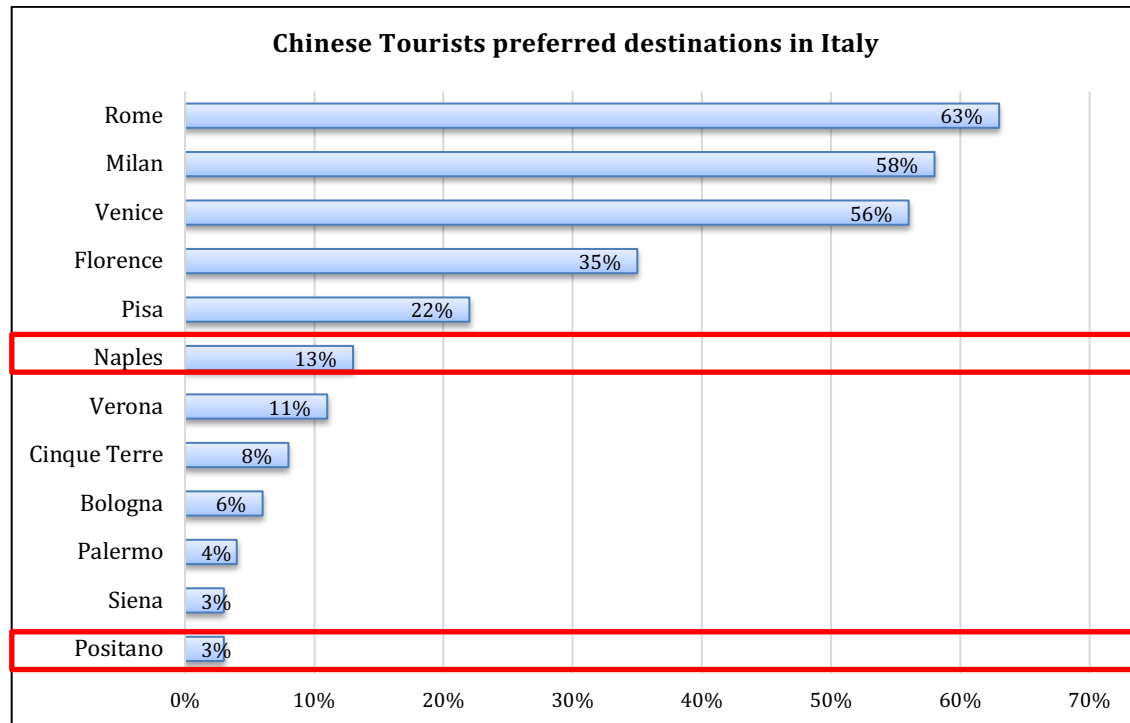
Among Italian destinations, Rome is the top choice for Chinese tourists, with 63% of them considering the Italian capital as the primary destination for their travel, followed by Milan (58%), Venice (56%) and Florence (35%). This also partially reflects the ranking of what Chinese tourists consider as unmissable attractions: the leaning tower of Pisa and the Colosseum are the most popular attractions for 54% and 49% of Chinese planning to visit Italy.

Looking at the preferences stated by Chinese travellers, it emerges that Naples ranked as the sixth preferred destination for Chinese tourists (13% of respondents), with the most popular attractions in the area of Naples comprehending the Archeological area of Pompei and the Mount Vesuvius (17% of respondents) and Positano (6%). The reduced attraction capacity of Naples and Campania signals a reduced interest for the attractions located in Campania Region on behalf of Chinese tourists, thus resulting in a less uniform distribution of Chinese across the regional territory.

²⁶ ENIT (2023). Nuovi trend del turismo cinese ed evoluzione del mercato [Cristiano Varotti - ENIT - China Country Manager]. Available at: https://www.enit.it/storage/202304/20230428133800_nuovi%20trend%20del%20turismo%20cinese%20ed%20evoluzione%20del%20mercato%20-%20cristiano%20varotti%20-%2020%20aprile%202023.pdf



Figure 32: Answer [Multiple] to the question “If you can visit Italy, which cities do you prefer?”



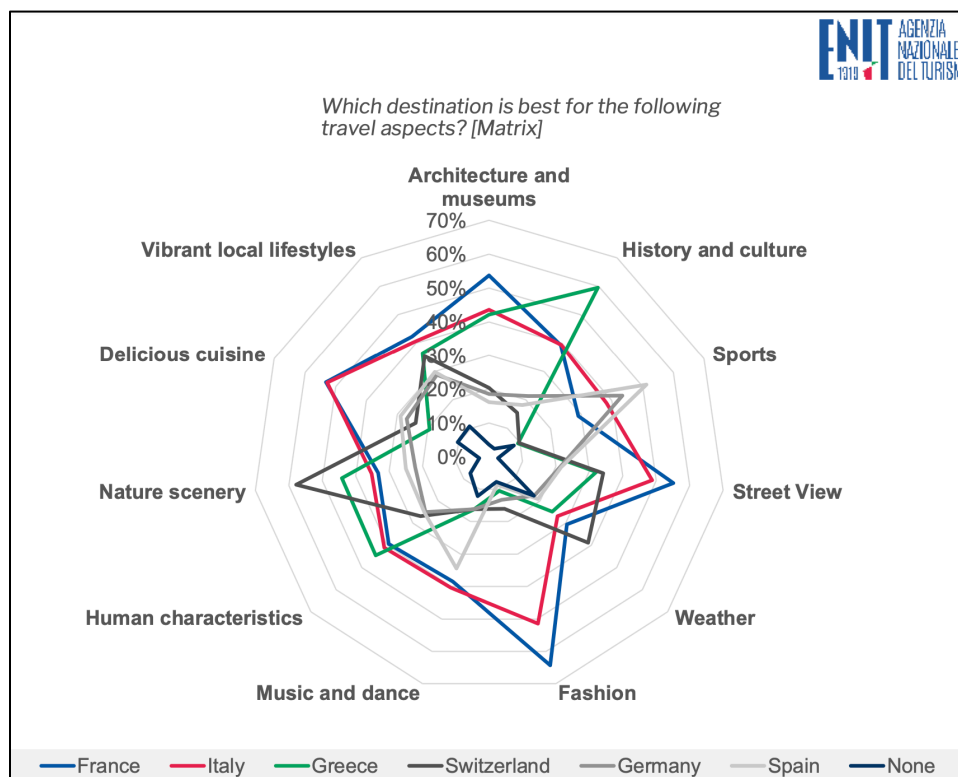
Source: Authors' elaboration on Outbound Chinese Travelers Research (ENIT)

The main drivers of Chinese tourism in Italy involve natural sceneries (64% of respondents), historical heritage and architecture (64%), cuisine (56%), fashion brands (31%) and lifestyle (23%). Compared with other European countries, Italy performs well among Chinese travellers, being considered the best European destination for street view, music and cuisine, while being the second-best destination for History, Culture and human characteristics (following Greece), Architecture and museums, Fashion and local lifestyle (after France) (data from ENIT survey).



As a consequence, together with sightseeing, Chinese tourists rank shopping as the top experience, followed by indulging in fine wine and food tasting. Exploring landmarks and natural scenery comes next. Additionally, for some visitors, experiencing sports, especially football, is a key activity to enjoy while in Italy.

Figure 33: Answer [Multiple] to the question “Which destination is best for the following travel aspects? [Matrix]”



Source: Authors' elaboration on Outbound Chinese Travelers Research (ENIT)

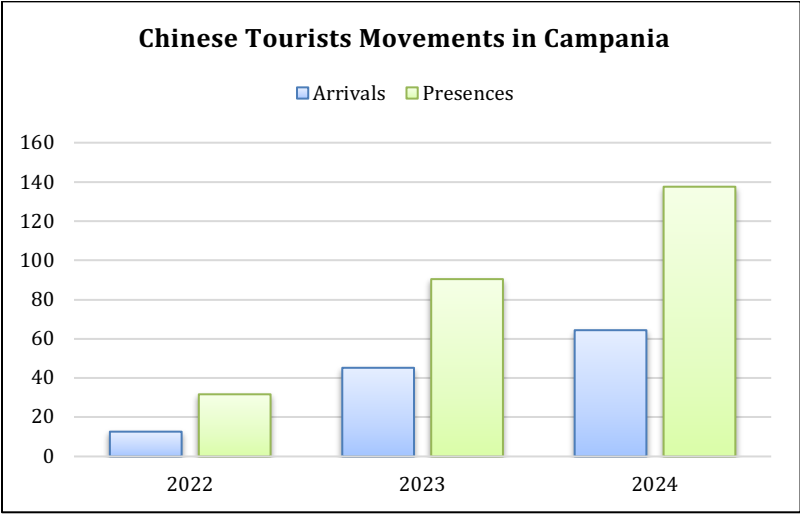
2.2. Chinese Tourism in the catchment area

From a quantitative perspective, Chinese tourism in Campania has shown a marked recovery in the post-pandemic period, particularly between 2023 and 2024, following the progressive easing of travel restrictions and containment measures in China.

To quantify the presence and distribution of Chinese tourists in the Campania region, data on hotel and non-hotel accommodation movements are available, as obtained from the Regional Tourist Detector platform (Rilevatore Turistico Regionale) provided by the Campania Region. From the perspective of Chinese tourist arrivals in the Campania region, a remarkable increase of +185% was recorded in 2023 compared to 2022. Specifically, while 12,644 arrivals were recorded in 2022, this figure rose to 45,207 in 2023, with a further increase to 64,388 arrivals in 2024 (+42% compared to the previous year).

The presence of Chinese tourists in both hotel and non-hotel accommodation establishments also registered considerable growth, especially between 2022 and 2023, rising from 31,693 to 90,432 (+185%). In 2024, an additional increase was recorded, reaching 137,552, representing a 52% growth in the accommodation movement of Chinese tourists visiting Campania compared to the previous year. These data indicate that, on average, Chinese tourists spend two nights in various accommodations across the Campania region, with a slight increase between 2023 and 2024 (from an average of 2.00 nights in 2023 to 2.14 nights per tourist on average in 2024).

Figure 34: N. of Chinese tourism arrivals and presence (2022-2023)



Source: Authors' elaboration on Regional Tourist Detector platform (Rilevatore Turistico Regionale)

Table 16: Chinese tourism arrivals and presence (2022-2023)

Chinese Tourists Movements in Campania			
Arrivals	2022	2023	2024
Number	12,644	45,207	64,388
Variation		+258%	+42%
Presences	2022	2023	2024
Number	31,693	90,432	137,552
Variation		+185%	+52%

Source: Authors' elaboration on Regional Tourist Detector platform (Rilevatore Turistico Regionale)

In 2024, the Provinces of Naples and Salerno were the most attractive areas of the Region for Chinese tourists, with 54,866 and 10,309 presences, representing 82% and 15% of the total Chinese presence in Campania. Overall, in spite of a significantly lower number of tourists, Campania provinces reported a sustained growth of tourism in 2023, whose rates are comprehended between +87% reported in the

Province of Avellino and +894% of the Province of Benevento. Even in 2024, all Provinces showed increased Chinese presence compared to 2023, except for the province of Benevento (-64% in 2024).

Table 17: Chinese tourism arrivals and presence (2022-2024)

Number				Share on Total (%)			Variation (%)	
Province	2022	2023	2024	2022	2023	2024	2023-2022	2024-2023
Naples	10,291	36,934	54,866	81%	82%	82%	+259%	+49%
Salerno	1,847	6,546	10,309	15%	14%	15%	+254%	+57%
Caserta	370	1,198	1,587	3%	3%	2%	+224%	+32%
Avellino	102	191	260	1%	0%	0%	+87%	+36%
Benevento	34	338	121	0%	1%	0%	+894%	-64%
Total	12,644	45,207	67,143	100%	100%	100%	+258%	+49%

Source: Authors' elaboration on Regional Tourist Detector platform (Rilevatore Turistico Regionale)

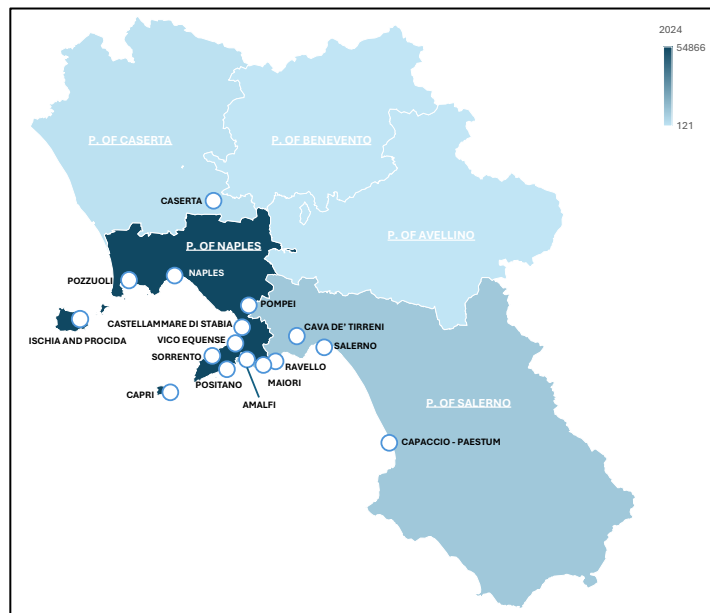
Within Campania, Chinese tourist arrivals are concentrated in a limited number of destinations. In 2024, Naples recorded the highest number of arrivals, with approximately 25,000 Chinese tourists (37.1% of the total). This was followed by the Sorrento area (Province of Naples), with 12,241 arrivals (18.2%), marking a significant increase compared to 2022 (+380%). Castellammare di Stabia also recorded a relevant share, with 3,063 arrivals (4.6%).

In general, the areas with the highest concentration of Chinese tourists in the Province of Naples are those located within or near the Sorrentine Coast (Sorrento, Sant'Agnello, Vico Equense). For example, Castellammare di Stabia is strategically located along transport links between Naples and the Sorrentine Coast (via the Circumvesuviana railway) and is just a few kilometres from the Pompeii, Herculaneum, and Oplontis archaeological sites. The city of Pompeii attracted around 1,700 Chinese tourists to both hotel and non-hotel accommodations (+57.2% compared to 2023, which had already seen a growth of 154% from 414 arrivals in 2022). Another popular area for Chinese tourists is the Gulf of Naples, with Capri recording 2,755 arrivals (4.1%) in 2024 and Ischia and Procida collectively hosting 600 Chinese tourists (1% of the total).

In the Province of Salerno, the main attractions were the Amalfi Coast locations: Amalfi (1,550 arrivals), Positano (870), Ravello (748), and Maiori (476). Similarly, Cava de' Tirreni's geographical location offers easy access to both the Pompeii archaeological site (20 km away) and the Amalfi Coast (25 km from Cava de' Tirreni to Amalfi). Other notable attractions in the province include Capaccio-Paestum, home to one of the region's most visited archaeological parks, and the city of Salerno itself. Approximately 1,600 Chinese tourists visited the Province of Caserta in 2024, with the Royal Palace (Reggia Borbonica) in the provincial capital serving as the primary attraction.



Figure 35: Main tourist destination in Campania



Source: Authors' elaboration on data from the Regional Tourist Detector platform

Table 18: Chinese arrivals and presence in the main tourist destination in Campania (2022-2024)

Province	Locality	Number		Variation on 2023		Relevance on total	
		Arrivals	Presences	Arrivals	Presences	Arrivals	Presences
Naples	Naples	24,919	45,886	+42.2%	+37%	37.1%	33.4%
	Sorrento and Sant'Agnello	12,241	27,504	+69.2%	+78.8%	18.2%	20.0%
	Castellammare di Stabia	3,063	5,686	+59.7%	+118.5%	4.6%	4.1%
	Island of Capri	2,755	6,653	+73.5%	+118.4%	4.1%	4.8%
	Pozzuoli	2,411	4,950	+47.1%	+65.8%	3.6%	3.6%
	Pompei	1,656	2,992	+57.2%	+4.7%	2.5%	2.2%
	Vico Equense	1,074	2,046	+219.6%	+193.9%	1.6%	1.5%
	Islands of Ischia and Procida	602	1,598	+19.6%	+12.3%	0.9%	1.2%
	Other localities in the province	6,145	11,201	+19.3%	+15.4%	9.2%	8.1%
Salerno	Amalfi	1,547	3,694	+47.8%	+89.1%	2.3%	2.7%
	Cava de' Tirreni	1,050	1,464	+185.3%	+244.4%	1.6%	1.1%
	Positano	870	1,634	+29.1%	-27.9%	1.3%	1.2%
	Ravello	748	1,745	+31.9%	+53.7%	1.1%	1.3%
	Maiori	476	2,881	+31.1%	+116.6%	0.7%	2.1%
	Capaccio Paestum	254	537	+45.1%	+32.5%	0.4%	0.4%
	Salerno and other localities in the province	5,364	12,766	+59.9%	+77.3%	8.0%	9.3%
Caserta	Caserta and other localities in the province	1,587	2,491	+32.4%	+22.4%	2.4%	1.8%
Benevento	Avellino and other localities in the province	260	1,548	+36.1%	+40.6%	0.4%	1.1%
Avellino	Benevento and other localities in the province	121	276	-64.2%	-34.9%	0.2%	0.2%

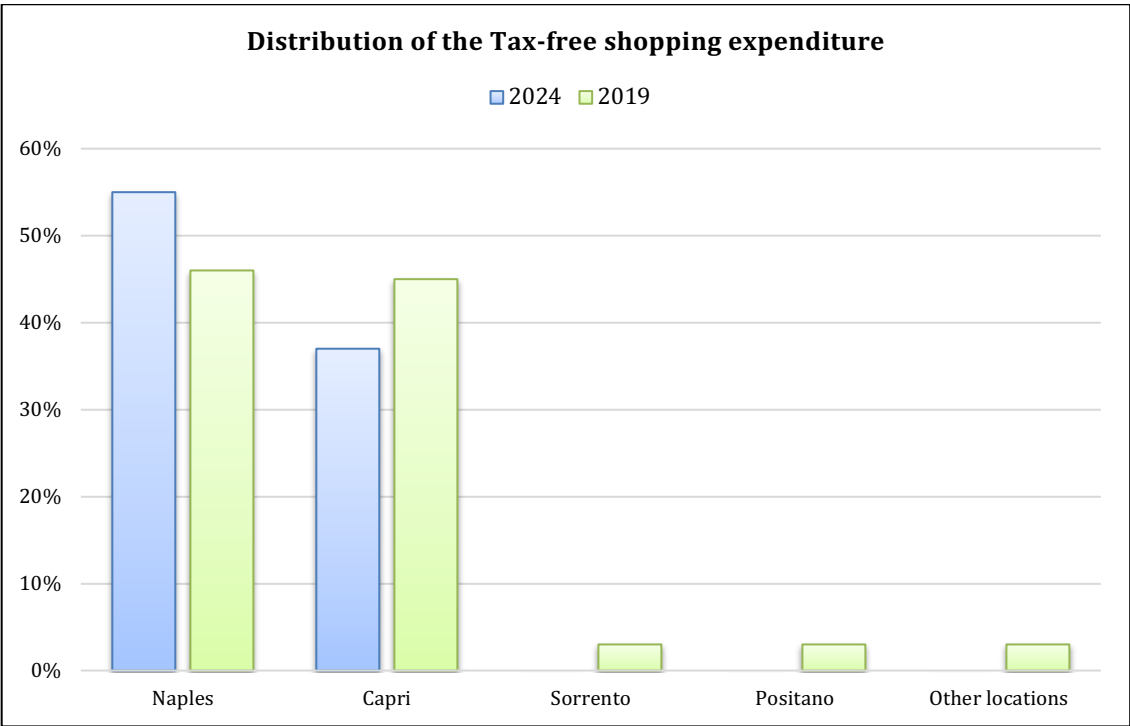
Source: Authors' elaboration on Regional Tourist Detector platform (Rilevatore Turistico Regionale)



According to a Global Blue survey on Chinese shoppers in Campania, Chinese shoppers accounted for 3% of the total tax-free shopping expenditure in 2024. Although this value is significantly lower than the 9% reported in 2019, it still represents a 68% recovery of Chinese tax-free shopping expenditure compared to 2019. Notably, this recovery is higher than the national average, which stands at 58%.

When examining key tourist destinations, it is clear that Naples accounted for 46% of total tax-free shopping expenditure by Chinese shoppers, while Capri followed closely at 45%. Sorrento and Positano each contributed 3%, with other locations making up the remaining 3%. Since the pandemic, Naples has lost some of its dominance in tax-free shopping, as it represented 55% of total expenditure in 2019, while Capri accounted for 37%.

Figure 36: Tax-free shopping expenditure (% of total)

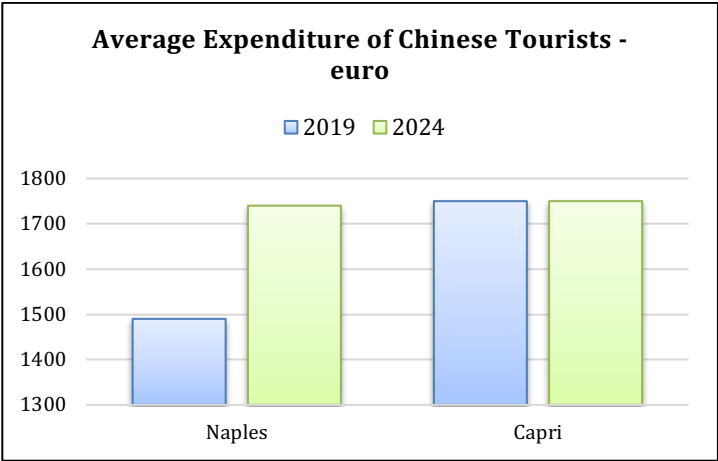


Source: Authors' elaboration on data from the Regional Tourist Detector platform

In terms of spending habits, the average expenditure of Chinese shoppers in Campania in 2024 was €1,473, marking a 16% increase compared to 2019. While the average expenditure in Capri has remained relatively stable post-pandemic at €1,747, there has been a noticeable increase in Naples. In 2019, the average Chinese shopper in Naples spent around €1,500, whereas this figure rose to nearly €1,722 in 2024. This increase reflects the growing purchasing power of Chinese tourists in Campania, aligning with the EU and national trends, as detailed in previous sections of this report.



Figure 37: Average Expenditure of Chinese Tourists

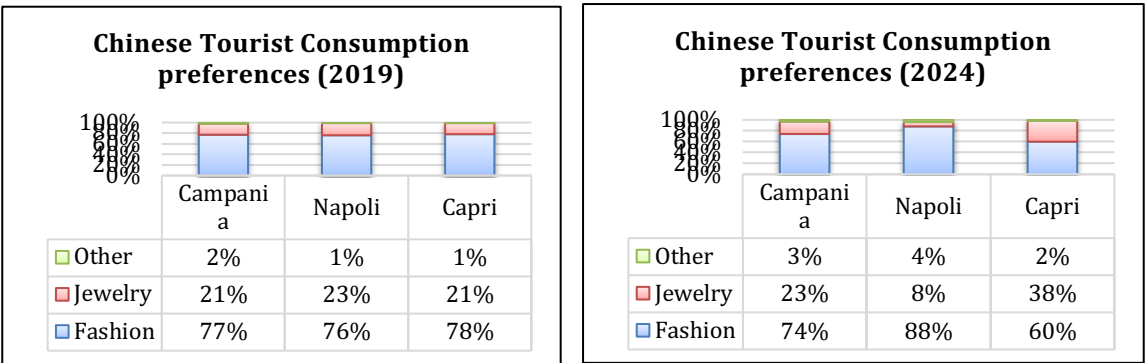


Source: Authors' elaboration on data from the Regional Tourist Detector platform

Analysing the consumption preferences of Chinese tourists reveals that, at the regional level, the main product categories contributing to tax-free shopping in 2024 were fashion and clothing (74%) and watches and jewellery (23%). Overall, there have been only slight changes in the shopping habits of Chinese tourists visiting Campania: in 2019, fashion accounted for 77% of their expenditure, while watches and jewellery made up 21%. However, some notable shifts are observed when focusing on specific locations, such as Naples and Capri. In Naples, 88% of total expenditure was spent on fashion and clothing, a significant increase from 76% in 2019. Similarly, in Capri, fashion and clothing accounted for 60% of tax-free shopping expenditure (down from 78% in 2019), while the share for watches and jewellery rose substantially to 38%, well above the regional average.

The increased purchasing power and changing consumption preferences reflected in tax-free spending indicate a clear trend towards luxury and high-end shopping. These interests align with the key motivations of many Chinese tourists planning a visit to Italy.

Figure 38: Consumption preference of Chinese tourists in tax-free shopping



Source: Authors' elaboration on data from the Regional Tourist Detector platform

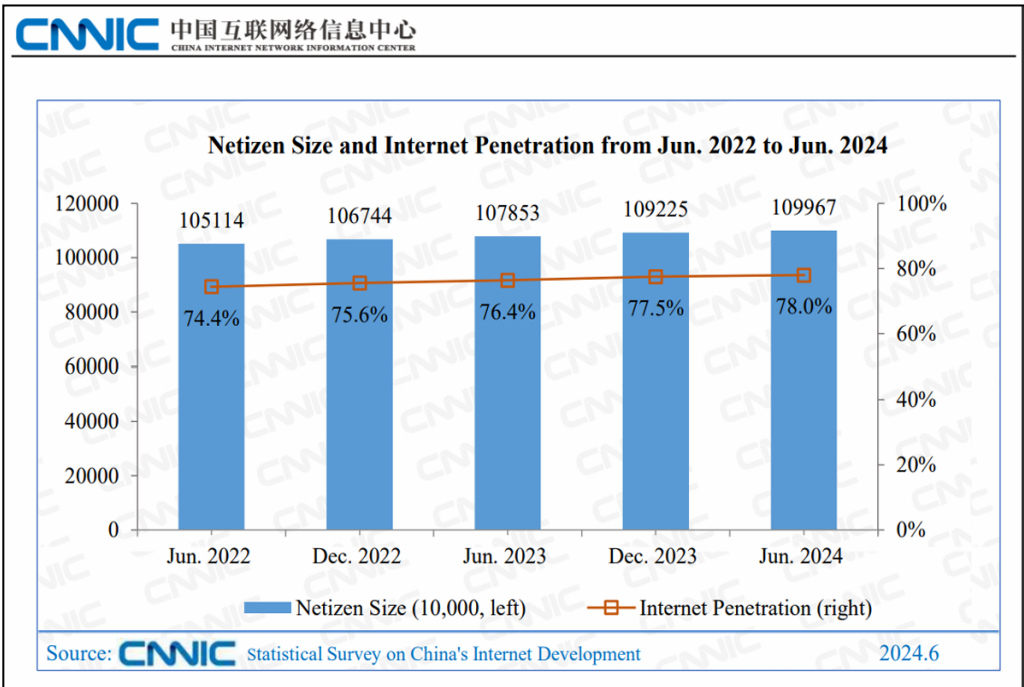


2.3. Potential of Naples and Campania: Content analysis on Chinese social media

Internet users in China

By June 2024, the number of Internet users in China had reached nearly 1.1 billion (1.09967 billion), an increase of 7.42 million compared to December 2023, with an Internet penetration rate of 78.0%, up by 0.5 percentage points since December 2023.

Figure 39: Netizen Size and Internet Penetration from Jun. 2022 to Jun. 2024



Source: CNNIC



China's online travel booking market continued to heat up, and the related platforms were boosting performance dramatically. Emerging platforms such as Xiaohongshu and TikTok (Douyin) directly linked travel products and services through content, which became a new channel for travel information sharing and service booking and further stimulated the innovation vitality of the industry.²⁷

Naples on Xiaohongshu

Xiaohongshu 小红书 (REDNote) focuses on lifestyle topics, the ecosystem has given it a growing advantage in competition with traditional Chinese search engines, making it a new generation search engine and earning it the reputation of "National Lifestyle Guide". Xiaohongshu recorded almost 600 million daily search queries in 2024, reportedly half that of Baidu and doubled over the past year. Xiaohongshu has more than 300 million active users per month. Therefore, we conducted our research on Xiaohongshu, as it is the most widely used social media platform among Chinese tourists for planning their travel itineraries. Our research aimed to address the following questions: (1) How do Chinese tourists access the catchment area? (2) What attractions or sites do they visit within the catchment area?

We conducted qualitative research to explore the most searched keywords related to the catchment area on Xiaohongshu. The dataset was assembled as follows: we first identified relevant tourist attractions in the catchment area and compiled a list of keywords (see Table 1). We began by creating a list of major tourist attractions to determine the presence and relevance of the catchment area-related content on Xiaohongshu. This initial step allowed us to assess whether these attractions were being discussed or searched for by users on the platform. Using this list, we searched for the selected keywords on Xiaohongshu, collecting 200 posts published between January 1, 2023, and December 31, 2024. This time frame was chosen because, before 2023, COVID-19 restrictions limited Chinese outbound tourism. Additionally, it reflects the most recent trends in Chinese tourist behavior.

Table 19: List of keywords

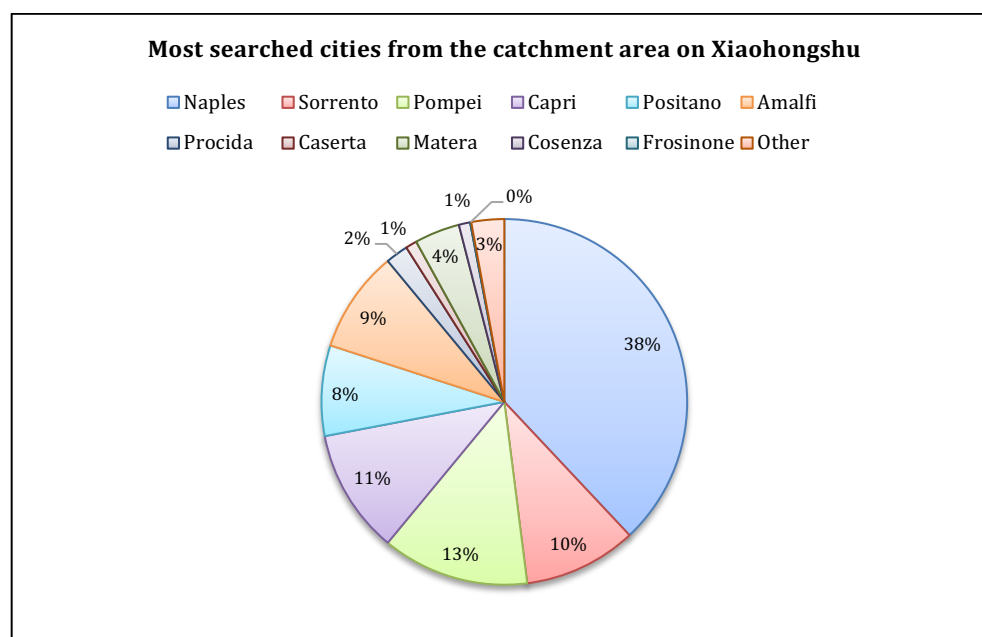
Keywords (Chinese)	Translation
那不勒斯 (Nàbùlèsī)	Naples
索伦托 (Suǒlúntuō)	Sorrento
庞贝 (Pángbèi)	Pompei
卡普里 (Kǎpǔlǐ)	Capri

²⁷ China Internet Network Information Center (2024), *The 54th Statistical Report on China's Internet Development*, available at: <https://www.cnnic.com.cn/IDR/ReportDownloads/>

波西塔诺 (Bōxītǎnuò)	Positano
阿马尔菲 (Āmǎ'ěrfēi)	Amalfi
普罗奇达 (Pǔluóqídá)	Procida
卡塞塔 (Kǎsàitǎ)	Caserta
马泰拉 (Mǎtàilā)	Malta
科森扎 (Kēsēnzā)	Cosenza
佛罗西诺内 (Fúluóxīnuònèi)	Frosinone

After compiling the list, we searched for each attraction on Xiaohongshu to identify posts mentioning them. This process helped us measure the visibility and popularity of the catchment area-related sites. Initially, we did not include Ischia on our list. However, data reveals it as one of the touristic attractions that Chinese users choose because of “L’Amica Geniale”, so we included it later in our list. We present the percentage of the most searched cities in the catchment area in our sample in Figure 2.

Figure 40: Most searched cities from the catchment area on Xiaohongshu



Source: Authors' elaboration

Our analysis focused on the text descriptions and images within each post, and we manually annotated the data to create a corpus related to the catchment area. Using a keyword-matching method based on this corpus, we identified four thematic categories (Table 2): (i) travel behaviors and flows of Chinese tourists to the catchment area, (ii)



promotional strategies, (iii) perceptions of artistic, cultural, and gastronomic heritage, and (iv) safety concerns within the catchment area.



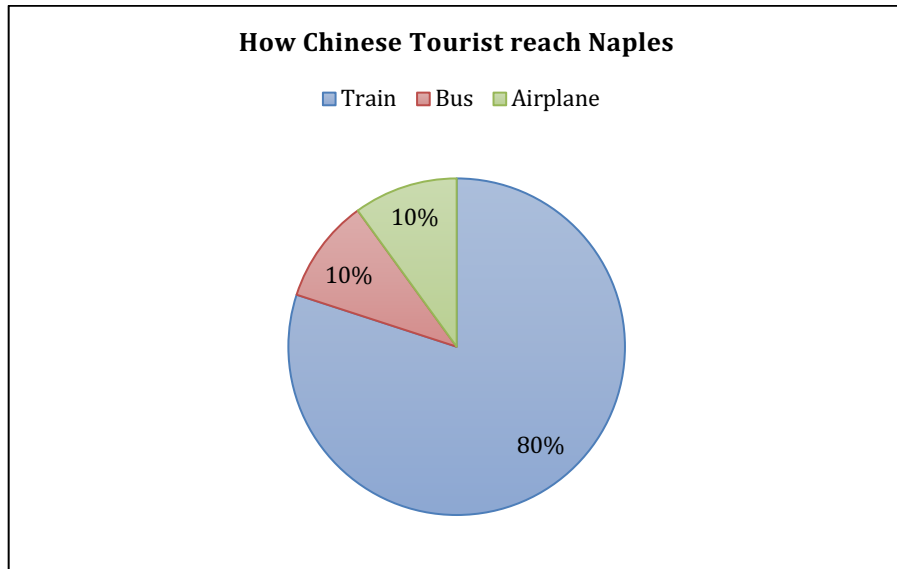
Table 20: Thematic categories

Thematic Category	Description	Codes
Means of Transportation	Tourists’ preferred modes of travel	1=Train, 2=Bus, 3=Car
Safety Perception	How tourists describe the safety of destinations	1=Safe, 2=Unsafe, 3=Dirty, 4=Messy
Attractions	Tourist’s main points of interest	1=L'Amica Geniale locations, 2=Archaeological sites, 3=Museums, 4=Pizza, 5=Other
Cities Mentioned	Destinations visited or discussed by tourists	1=Naples, 2=Sorrento, 3=Pompeii, 4=Capri, 5=Positano, 6=Amalfi, 7=Procida, 8=Caserta, 9=Matera, 10=Cosenza, 11=Frosinone

RQ1: How do Chinese tourists reach the catchment area?

The Chinese tourists first arrive in Naples and then go to other destinations in the catchment area. Our data in Figure 3 (Chinese means of transportation to reach Naples) indicate that the train was the most common mode of transportation for reaching Naples, particularly from Rome (95%), with a much smaller percentage coming from Florence (5%). This was followed by onward travel via bus, which accounted for 100% of trips originating from Rome Fiumicino Airport. The percentage of travellers arriving by plane was relatively small, with 66.67% coming from other European countries (France and Switzerland) and 33.33% from China (via Shanghai – Istanbul – Naples).

Figure 41: Means of transportations to reach Naples



Source: Authors' elaboration

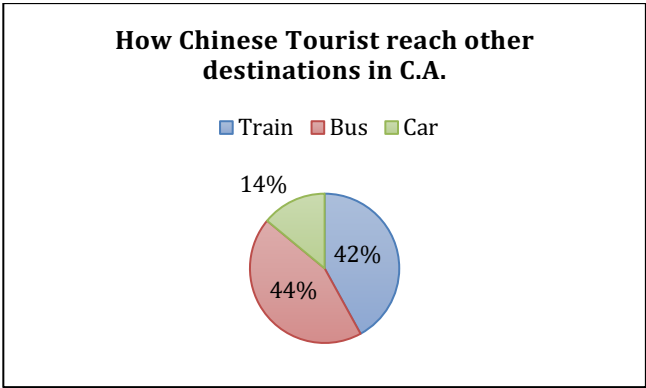


Figure 4 shows the way of transportations used by Chinese tourists to reach other destinations in Naples. Our data highlights the preferred modes of transportation for various destinations from Naples. The majority, 26.32%, opt for the train to reach



Pompeii, while only 3.39% choose the bus for the same route. When heading to the Amalfi Coast, 19.30% take the bus, compared to 5.36% who prefer the train. For trips to Matera, 8.77% travel by train from Bari, 8.8% by bus from Bari, whereas 1.75% take the bus from Naples. Additionally, 7.01% use the train from Naples to visit the Reggia di Caserta, and 14.04% take the train to Sorrento. Finally, 5.26% of travelers rent a car to explore destinations like the Amalfi Coast, Frosinone, or Caserta.

Figure 42: Means of transportation used to travel around Naples

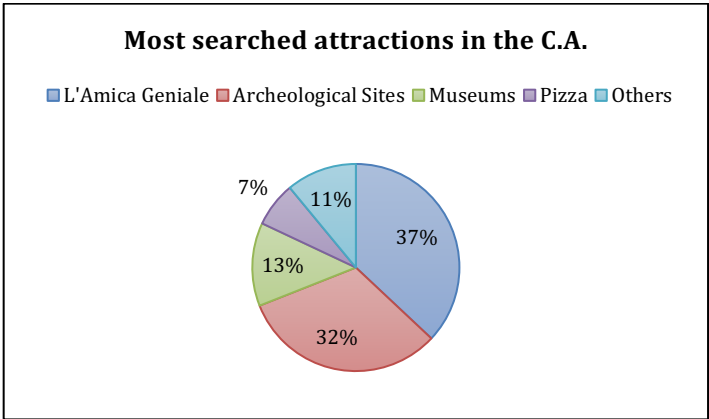


Source: Authors' elaboration

RQ2: What attractions or sites do they visit within the catchment area?

Our data in Figure 5 (Attractions in the catchment area for Chinese tourists) show that the “L'Amica Geniale” filming locations were the most popular attraction among Chinese tourists, followed by archaeological sites, particularly UNESCO World Heritage sites such as Pompeii, Scavi di Matera, and Reggia di Caserta. Museums came next, followed by pizza and other attractions, including the San Carlo Theatre, natural sites, Maradona Stadium, Sentiero degli Dei, churches, Toledo Station, and vintage shops.

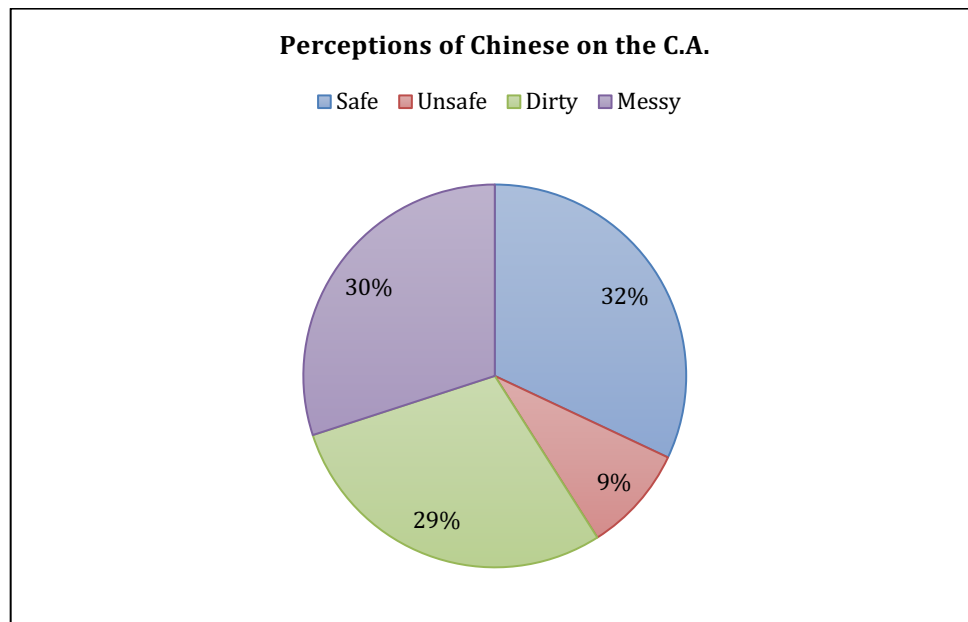
Figure 43: Attractions in the catchment area for Chinese tourists



Source: Authors' elaboration

Our data in Figure 6 (Chinese tourists' safety perceptions in the catchment area) show that Chinese tourists generally feel safe, although some complaints were made about unsafe areas. The most significant concern, however, was the dirty and messy conditions, particularly in Naples.

Figure 44: How Chinese tourists describe the safety of destinations



Source: Authors' elaboration

Italian Promotional System in China

The Italian National Tourist Board (ENIT) has implemented various promotional activities to highlight the unique attractions of several Italian destinations. Ischia:²⁸ ENIT launched the "This is Ischia" campaign to revitalize tourism on the island. This initiative encourages both Italian and international visitors to share their personal photographs of Ischia using a dedicated hashtag. The campaign is active across digital platforms, print, and outdoor media, aiming to showcase the island's beauty and attract tourists. Basilicata:²⁹ In collaboration with the Basilicata Territorial Promotion Agency, ENIT hosted the 2022 News UK Travel Awards in Matera. This event, considered one of the most prestigious in the travel industry, was part of efforts to promote the region's attractions to an international

²⁸ Rúhé zài yìdàlì dùguò wēnnuǎn de dōngjì jiànrì? Pào wēnquán 如何在意大利度过温暖的冬季假日？泡温泉！[How to spend a warm winter holiday in Italy? Soak in a spa!], ENIT, November 1st, 2023, available at: <https://mp.weixin.qq.com/s/InEQIY5hiyBXYXXDGHZy8A>

²⁹ Chuānyuè Bāxīlìkǎtǎ 穿越巴西利卡塔Basilicata！[Crossing Basilicata!], ENIT, August 8, 2022, available at: <https://mp.weixin.qq.com/s/rMdBONwibKjI8OVLxiPogA>



audience. Pompei,³⁰ Naples,³¹ and the Amalfi Coast:³² ENIT has been involved in promoting these destinations through various initiatives, including participation in international trade fairs and workshops. These efforts aim to enhance the visibility of Italy's diverse regions and attract tourists by showcasing their unique cultural and natural attractions. Calabria:³³ While specific promotional activities by ENIT for Calabria were not detailed in the available sources, the organization generally supports Italian regions through international campaigns and participation in trade fairs, aiming to boost tourism across the country. Sponsorship of Italian Airlines:³⁴ ENIT collaborates with various partners, including airlines, to promote Italy as a travel destination. These partnerships often involve joint marketing campaigns to increase tourist arrivals. Workshops:³⁵ ENIT organizes and participates in numerous workshops and trade fairs to promote Italian destinations. These events serve as platforms to showcase Italy's tourism offerings to international markets and foster collaborations with global travel industry stakeholders.

Perception of Naples

As the results show, Naples is the most searched destination by tourists, so we conducted in-depth research to identify which trends related to Naples are most popular on social media. The most searched words related to Naples on Xiaohongshu are: Wǒ de tiāncái nǚyǒu 我的天才女友 (L'Amica Geniale), Nàbùlèsī 那不勒斯 (Naples), Nàbùlèsī Guózhì Kǎogǔ Bówùguǎn 那不勒斯国立考古博物馆 (Museo Archeologico Nazionale di Napoli- MANN). We gathered other trends on Naples using the label "Others", which includes: Wéisūwēi 维苏威 (Vesuvius), Nàbùlèsī Huánggōng 那不勒斯皇宫 (Royal Palace of Naples), Píngmín Biǎojié Guǎngchǎng 平民表决广场 (Piazza del Plebiscito), Shèng kǎluò jùyuàn 圣卡洛剧院

³⁰ Yìdàlì 11 yuè lǚxíng zhǐnán 意大利11月旅行指南 [November Travel Guide to Italy], ENIT, November 7, 2022, available at: <https://mp.weixin.qq.com/s/vnsoPUBUzFD4s7zQP6Qngw>

³¹ Nàbùlèsī jí zhōubiān 6 gè wényì dǎkǎ de 那不勒斯及周边6个文艺打卡地 [6 literary and artistic check-in spots in Naples and surrounding areas], ENIT, November 20, 2023, available at: https://mp.weixin.qq.com/s/CNv4nIVlfiA95Zx1_YwFjg

³² Ā mǎ'ěr fēi | níngméng yuán lǐ de wǔlín gāoshǒu 阿马尔菲 | 柠檬园里的武林高手 [Amalfi | Martial Arts Master in the Lemon Garden], ENIT, June 7, 2018, available at: https://mp.weixin.qq.com/s/Ql1TNg3JOH6_rQFvCMJSWQ

³³ Yìdàlì zhī xià! 意大利之夏! [Italian summer], ENIT, July 29, 2022, available at: <https://mp.weixin.qq.com/s/wQbOGmsHEbyTpBT1qzg09g>

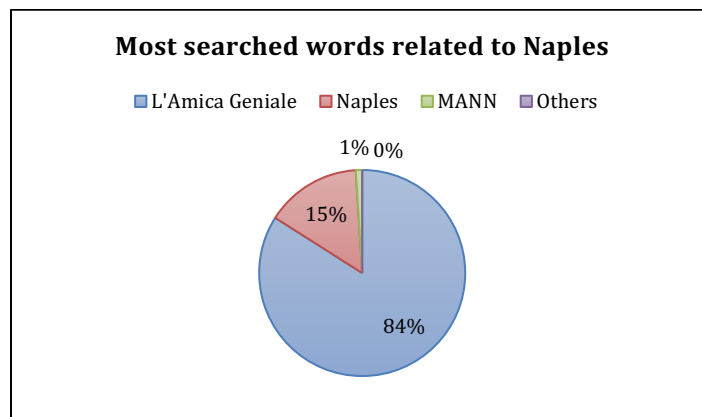
³⁴ Liù yuè, yìdàlì hé zhōngguó jiāng huīfù měi zhōu 4 tiáo zhí fēi hángxiàn! 六月，意大利和中国将恢复每周4条直飞航线! [In June, Italy and China will resume four direct flights per week!], ENIT, dsfds, available at: <https://mp.weixin.qq.com/s/6tvuZXVoEqG6RCIBQCwblg>

³⁵ 2020 Yìdàlì guójiā lǚyóu jú xiàn shàng lù yǎn zhèngshì shàngxiàn 2020意大利国家旅游局线上路演正式上线 [2020 Italian National Tourism Administration Online Roadshow Officially Launched], ENIT, data, available at: <https://mp.weixin.qq.com/s/sxpZ-0ubFZ927CC24drJSg>; <https://mp.weixin.qq.com/s/ucM5WewBCIzQUIxwA7mhwg>



(San Carlo Theatre), Dàbùlèsī fāngyán 那不勒斯方言(Neapolitan dialect), Nàbùlèsī jīchǎngbāshì 那不勒斯机场巴士 (Naples Airport Bus), Nàbùlèsī jìniànpǐn 那不勒斯纪念品 (Naples souvenir) Xīn chéngbǎo 新城堡 (Castel Nuovo).

Figure 45: Most searched words related to Naples



Source: Authors' elaboration

We didn't find any posts that describe the airport as the arrival point. Instead, tourists search for the airport as the point from which to leave the city. Indeed, users search for how to get from the city to the airport using the bus.

L'Amica Geniale

Due to the widespread popularity of *L'Amica Geniale*, we will explore this phenomenon, which has captivated many people in China. Previous studies have already highlighted the significant impact and popularity of the Neapolitan novel in the country. The story follows the friendship between two girls, Elena "Lenù" Greco and Raffaella "Lila" Cerullo, who grow up in poverty on the outskirts of Naples. Lenù serves as the narrator of the story, which unfolds alongside Italy's historical and social transformations from the 1950s to the present day. It portrays a patriarchal society where women face oppression, and poverty limits their access to education, which is essential for achieving emancipation and breaking free from traditional family values. Friendship serves as both a cure and a poison, as the two protagonists follow divergent paths shaped by their family backgrounds.

Elena Ferrante, author of the novel, has been defined as one of the most influential writers of the XXI century.³⁶ The Chinese translation of her book "*L'Amica Geniale*" was

³⁶ "Wǒ de tiāncái nǚyǒu" zuìzhōng jì kāibō! Wáng'ānyì chēngzàn yuánzuò: "Zhè shì 2000 nián yǐhòu zuì yǒuqù de xiǎoshuō." 《我的天才女友》最终季开播！王安忆称赞原作：“这是2000年以后最有趣的小说。” [The final season of "My Brilliant Friend" begins! Wang Anyi praised the original work: "This is the most interesting novel after 2000."], The Paper, September 14, 2024, available at: https://m.thepaper.cn/newsDetail_forward_28732106



published in 2016 by Renmin Wenxue Chubanshe 人民文学出版社 (People's Literature Publishing House), which also published three other books in the series in 2017 and 2018. According to publishing house sources, the first book has sold over 600,000 copies on the Chinese market to date, while all 4 books have recorded total sales of over 2 million copies.³⁷ Cheng Ying, the translator of the book in China, has also explained some of the reasons behind the popularity of the book in China:

"The discussions entailed by the novels are quite similar to other markets: feminism, women writing, paternity and maternity, the influence of upbringing and education, social revolution and personal evolving. It has to be noted that the post-war Italian society bore much resemblance to China's society, especially when it comes to the inferior status of female gender and the huge discrepancy between the urban and rural areas: that's one of the reasons why the novel has been widely accepted in China."³⁸

The first volume of the Neapolitan Novels quadrilogy, *L'Amica Geniale*, received widespread acclaim in China, earning an impressive 8.6 rating on Douban in 2017 and ranking third among the most popular foreign books of the year; the second and fourth volumes, "The Story of a New Name" and "The Story of the Lost Child", were even named "Douban Book of the Year" in 2017 and 2018, respectively.³⁹ Douban (豆瓣) is a popular Chinese social networking service and review platform that allows users to share and discover content related to movies, TV shows, books, music, and events.

Figure 46: Douban ranking of the best-selling books in China in 2017.
L'Amica Geniale holds the first position.



³⁷ Restucci, F. (2023) *Elena Ferrante in China Analysis of the Translation of Cultural References in the First Volume of My Brilliant Friend*, Annali di Ca' Foscari. Serie orientale, doi: 10.30687/AnnOr/2385-3042/2023/01/015

³⁸ Restucci, F. (2020) *Elena Ferrante in China. Translation and reception of My Brilliant Friend* [Master's degree], University of Bologna, Specialized translation [LM-DM270] - Forlì

³⁹ Restucci, F. (2023) *Elena Ferrante in China Analysis of the Translation of Cultural References in the First Volume of My Brilliant Friend*, Annali di Ca' Foscari. Serie orientale, doi: 10.30687/AnnOr/2385-3042/2023/01/015



In 2018, director Saverio Costanzo released a TV series based on the Neapolitan novels, produced in collaboration with RAI, the American network HBO, and TIMvision, later distributed by Fremantle to over 50 countries, including China.⁴⁰ Chinese viewers streamed the series on the platform iQiyi (爱奇艺), where it received overwhelmingly positive feedback.⁴¹ Data shows that *L'Amica Geniale* achieved a score of 9.3, with 69.7% of users awarding it the highest rating. This score is based on a total of 74,402 user votes.

The series' popularity among Chinese readers was further amplified by the adaptation into a TV series, which drew significant attention to the “**Ferrante phenomenon**.” This interest was reflected in numerous Ferrante-related events across China, such as lectures at the Sinan Readers' Club in Shanghai – Sinan dushuhui 思南读书会, at Fudan University in Shanghai and at Nanjing University, conferences organized by the Italian Embassy and the Italian Institute of Culture in Shanghai, a photographic exhibition at the Muxin Art Museum in Wuzhen, and public discussions featuring the TV series' director, Saverio Costanzo.⁴² Additionally, the General Consulate of Italy in Chongqing hosted an event titled “Chongqing Meets My Brilliant Friend” (Chongqing yujian tiancai nüyou 重庆 – 遇见天才女友), honoring the translator Chen Ying.⁴³ These activities underscore the enduring cultural impact of Ferrante's work in China.

Figure 47: Promotional brochure from the Chinese publishing house



⁴⁰ Nàbùlèsì sìbù qǔ: Dòubàn 9.6 Fēn, yīnfā quánqíu rè yì, nǚhái dúshū dàodǐ yǒu duō chóng yào? 那不勒斯四部曲：豆瓣9.6分、引发全球热议，女孩读书到底有多重要？[Neapolitan Four: Douban score of 9.6, sparking global heated discussion: How important is it for girls to study?], Yeeyi, March 9, 2022, available at: <https://www.yeeyi.com/news/details/1287156/>

⁴¹ Restucci, F. (2020) *Elena Ferrante in Cina. Traduzione e ricezione de L'amica geniale* [Laurea magistrale], Università di Bologna, Corso di Studio in Specialized translation [LM-DM270] - Forlì

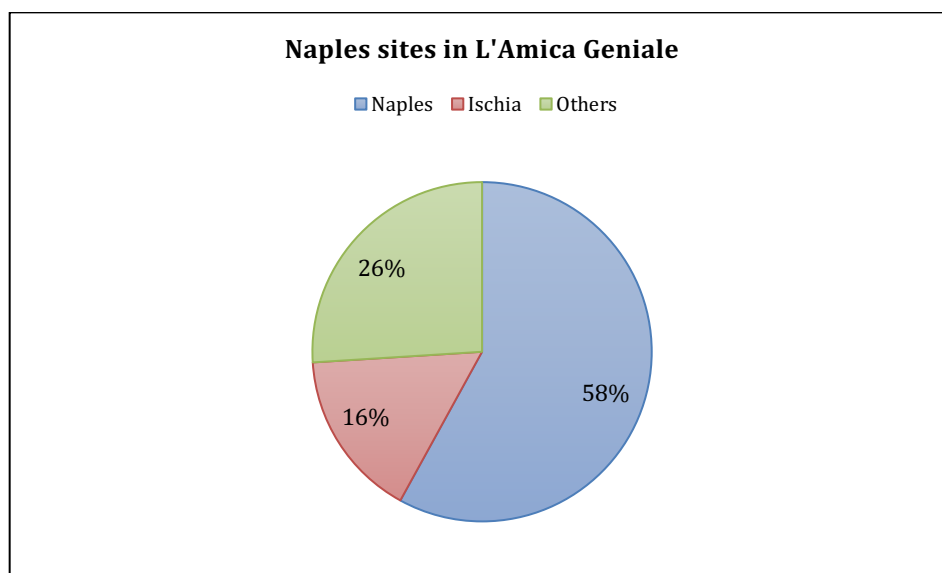
⁴² Restucci, F. (2020) *Elena Ferrante in China. Translation and reception of My Brilliant Friend* [Master's degree], University of Bologna, Specialized translation [LM-DM270] - Forlì

⁴³ Restucci, F. (2023) *Elena Ferrante in China Analysis of the Translation of Cultural References in the First Volume of My Brilliant Friend*, Annali di Ca' Foscari. Serie orientale, doi: 10.30687/AnnOr/2385-3042/2023/01/015



Our data also reveals that Chinese tourists become familiar with Naples and its attractions through “L’Amica Geniale”. More specifically, Figure 10 shows that among the different sites in Naples related to the novel 57.60% of visits are to Naples, 16.40% to Ischia and 26 % to others attractions, which include: Rione Luzzati (2.17%), Biblioteca Giulio Andreoli (2.17%), Gianturco (1.08), Piazza del Plebiscito (3.26%), Piazza Salvatore Lobianco (3.26%), Piazza Francesco Coppola (1.08%), Via Nicola Fraggiani 48 (1.08%), Via Marino Freccia (2.17%), San Gennaro Cathedral (3.26%), Quartieri Spagnoli/Spaccanapoli (4.30%), and Vesuvius (2.17%).

Figure 48: Naples Sites from L’Amica Geniale



Source: Authors' elaboration

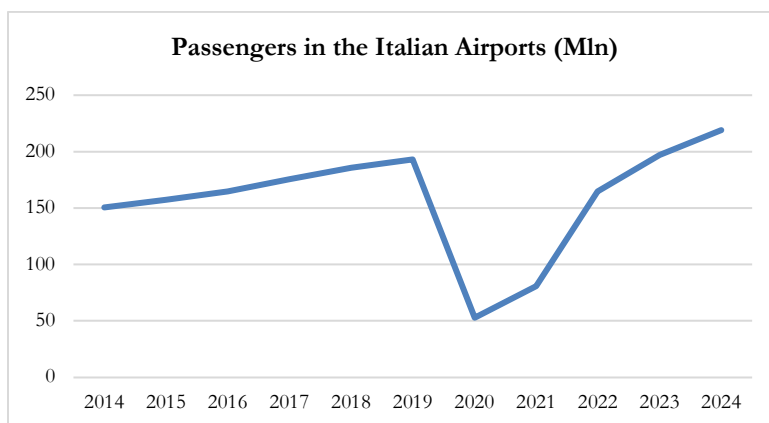


3. Flight Analysis

Giorgio Prodi, Raffaele Boffardi

In 2023, Italian airports achieved a historic milestone, registering 197 million passengers, surpassing pre-pandemic levels by 2.1%, with 2019 being the last unaffected by the global health crisis. Preliminary data for 2024 reveal that the Italian airport system closed the year with 219 million passengers, reflecting an 11.1% increase compared to 2023⁴⁴. Of these, approximately 146 million passengers travelled on international routes, confirming the strong recovery and growth of international air traffic.

Figure 49: Number of passengers in the Italian Airports



Source: Authors' elaboration on data from Assoeroporti

The post-COVID recovery has seen two different phases. The first one saw a dominant role for domestic travel, while, starting from 2023, the international segment fully recovered, reaching 128 million passengers.

By 2024, air traffic had returned to its pre-pandemic composition, with one-third of passengers traveling on domestic routes and two-thirds on international routes.

A geographical analysis of passenger traffic in 2023 indicated a robust recovery in Northern and Central Italy, with increases of +20% and +33%, respectively, compared to the previous year. Conversely, airports in the Southern regions and islands maintained the positive trends observed in 2022, showing growth rates of +10% and +9%, significantly exceeding the pre-pandemic levels⁴⁵.

⁴⁴ <https://assaeroporti.com/aeroporti-italiani-nel-2024-sfiorati-i-220-milioni-di-passeggeri-146-milioni-i-viaggiatori-su-rotte-internazionali/#:~:text=Nel%202024%2C%20tra%20i%20primi,8.921.833%20e%20Bari%20con>

⁴⁵ <https://assaeroporti.com/aeroporti-italiani-nuovo-record-storico-nel-2023-sfiorati-i-200-milioni-di-passeggeri/>





Among Italian airports, Naples Capodichino ranked fourth in terms of passenger traffic in 2023, with 12.4 million passengers, following Rome Fiumicino (40.5 million), Milan Malpensa (26.1 million) and Bergamo (16 million). The year marked the best performance in the airport's history, with passenger traffic increasing by 13.5% compared to 2022 and exceeding pre-pandemic levels (2019) by 14.1%. This growth was largely driven by the expansion of international traffic, which significantly exceeded the domestic segment, with 8.3 million international passengers compared to 4.1 million domestic passengers.

During the peak summer season, ..." a "Campania region as a tourist destination." con "During the peak summer season, Naples Capodichino Airport offered direct connections to 113 destinations across 34 countries, including 16 domestic and 97 international routes. The network includes major European hubs—such as Munich, Paris Charles de Gaulle, Frankfurt, London Heathrow, Istanbul and Madrid—as well as two intercontinental destinations, New York/Newark and Dubai. This expansion has been supported by the introduction and consolidation of new routes and by a diversified airline base, with 38 scheduled carriers operating at the airport, including four low-cost airlines based on site (Ryanair, easyJet, Wizz Air and Volotea). Overall connectivity has increased by approximately 20% over the past five years. Traffic data for 2024 (January–August) confirm this positive trend, with 8.6 million passengers recorded, corresponding to a 17% increase compared to the same period of the



previous year. These developments reinforce the role of Naples Airport as a growing international gateway and reflect the increasing attractiveness of the Campania region. The following section provides a detailed analysis of a specific traffic segment: passengers on indirect flights between Naples Airport and China.

3.1. Passenger Flows between Naples and China

The passenger volume between Naples and China represents a key indicator of the underlying demand for travel between the two areas, despite the absence of direct flight connections. Before the COVID-19 pandemic, this demand showed a sustained upward trend. According to data from the Capodichino Airport of Naples, the number of passengers travelling on indirect routes between Naples and China, as well as passengers from the catchment area using Rome Fiumicino Airport to reach Chinese destinations, increased at an average annual rate of approximately 10.8%, peaking at over 28,000 passengers in 2019.

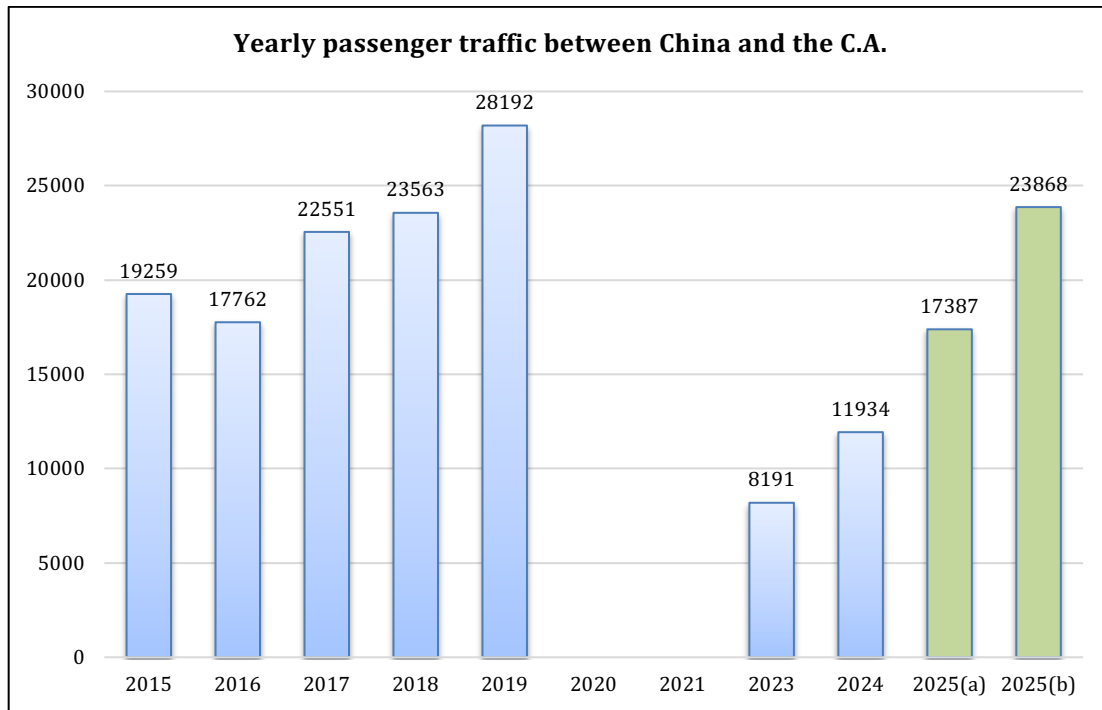
This growth trajectory was interrupted by the outbreak of the pandemic, which led to severe restrictions on international mobility in both countries. In Italy, measures such as mandatory testing, quarantine requirements and limitations on intercontinental flights were introduced in 2020 and progressively eased from mid-2021 onwards, with most restrictions lifted in 2022. In China, the zero-COVID policy remained in place until the end of 2022, imposing strict limitations on international travel, including quarantine requirements and restrictions on flights.

As a result, passenger flows between Naples and China were almost entirely halted during the period 2020–2022. The lifting of restrictions, particularly the end of the zero-COVID policy, enabled a gradual recovery of traffic. In 2023, approximately 8,000 passengers travelled between Naples and China, increasing to around 12,000 in 2024. Although still significantly below pre-pandemic levels, the +45% growth recorded in 2024 indicates a positive recovery trend.

Based on these dynamics, two preliminary projections have been developed for 2025 (Figure 50), assuming the absence of major external shocks. In the first scenario (2025a), the growth rate observed in 2024 (+45%) is maintained, leading to an estimated passenger volume exceeding 17,000. The second scenario (2025b) is based on data from the Trip.com Group Report concerning bookings for the 2025 Chinese Lunar New Year, which indicates that Naples is among the Italian destinations with the highest growth in demand from Chinese travelers (up to +100% compared to 2024). Assuming that this trend extends to the full year, the number of passengers could reach approximately 24,000 in 2025. While still below 2019 levels (–15%), this scenario would represent a substantial recovery compared to the post-pandemic period.



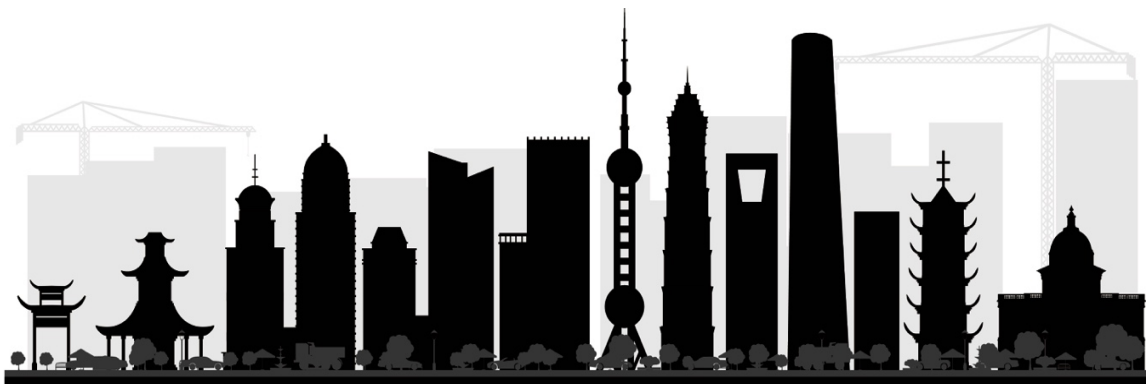
Figure 50: Passenger flying between the catchment area and China



Source: Authors' elaboration on data from the Airport of Naples Capodichino

Origins and Destination of Passengers

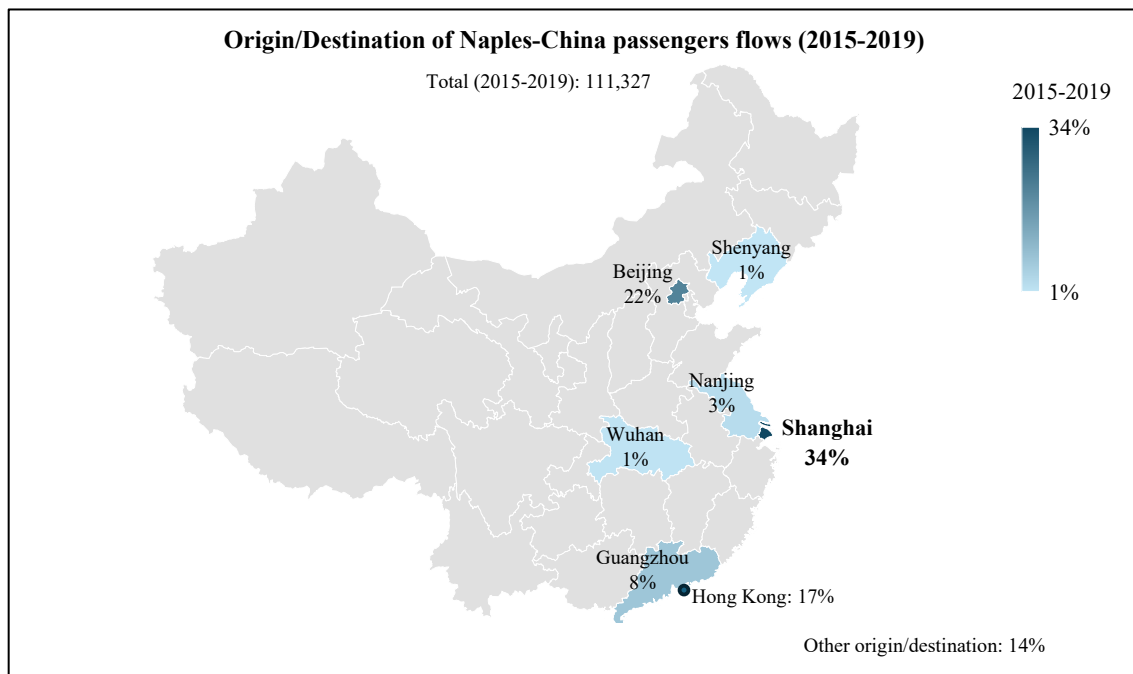
The passenger flows between Naples and China have been significantly shaped by key Chinese airport hubs, such as Beijing, Shanghai, and Hong Kong, through which a large portion of travel between the two regions occurs. However, the post-pandemic phase has led to a partial shift in the main destinations and origin areas for passengers in China.





As a matter of fact, in the 2015-2019 period, on a total of approximately 95 thousand passengers flying between the catchment area and China, 34% of them flew through the Shanghai Pudong International Airport, 22% through the Beijing Capital International Airport and 17% through the Hong Kong Airport. Other less relevant airport of flights destination/origin were Guangzhou and Nanjing (8% and 3% of total passengers, respectively).

Figure 51: Origin/Destination of Naples-China passengers flows (2015-2019)

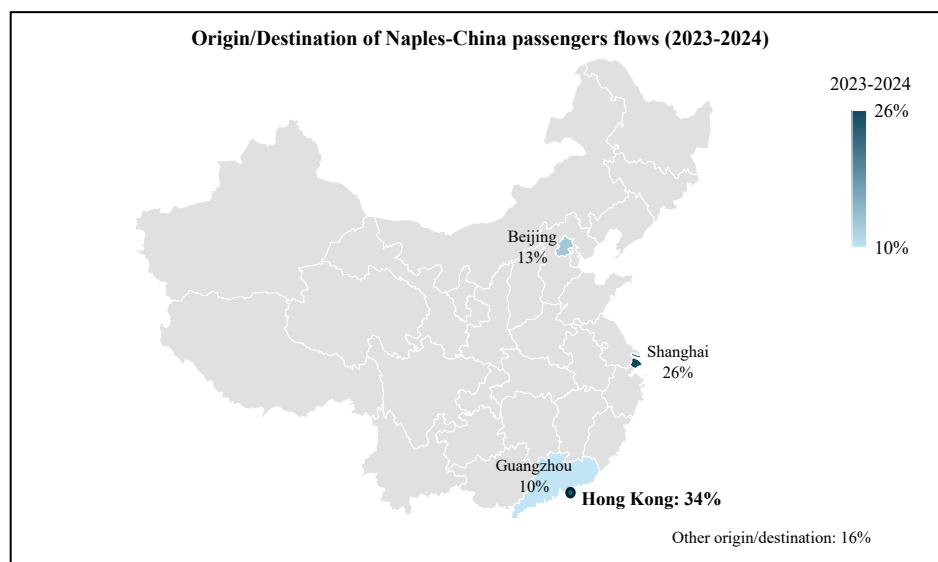


Source: Authors' elaboration on data from the Airport of Naples Capodichino



The most common origins/destinations of the around 20,000 passengers flying between Naples and China flights in 2023-2024 have been Hong Kong, Shanghai and Beijing. Hong Kong has been the main one (34%), followed by Shanghai (26%). The two airports absorbed 60% of the total passenger's traffic. This figure signals a reduction of the relevance of Beijing in passengers flows since in the post pandemic phase the airport of the Chinese capital city attracted "only" 13% of total passengers.

Figure 52: Origin/Destination of Naples-China passenger flows (2015-2019)



Source: Authors' elaboration on data from the Airport of Naples Capodichino

Intermediate Hubs

As said, the passenger flows between Naples and China are primarily channeled through four key Chinese airport hubs, such as Hong Kong International Airport, Shanghai Pudong International Airport, Beijing Capital International Airport and Guangzhou Baiyun International Airport. These airports play a crucial role in connecting passengers traveling from Naples to various destinations across China. In the absence of direct flights, passengers travel through intermediary hub airports, which serve as critical points for connecting passengers traveling between Italy and China. The presence of major international airlines at these hubs also offers passengers a range of options when it comes to flight schedules and pricing.

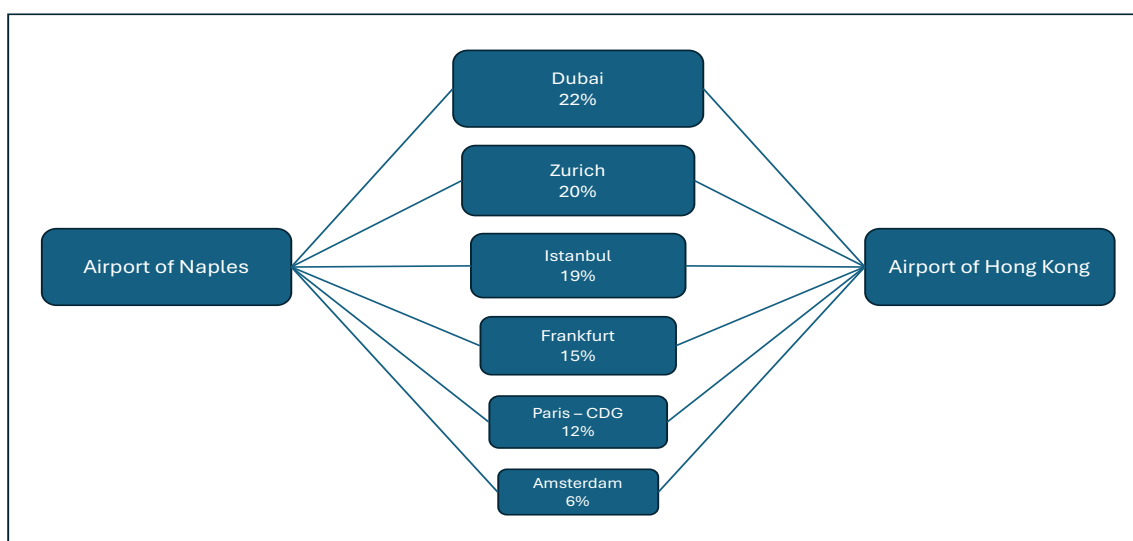
Indirect flights between Naples and China typically involve connecting through major international hubs. These flights are routed through key airports such as the Dubai International Airport (DXB), Istanbul Airport (IST), Frankfurt (FRA) or Rome Fiumicino (FCO), where passengers transfer to connecting flights bound for the different Chinese cities. The relevance of connections via the main international hubs varies according to the Chinese destination airport.





In 2024, as for flights between Naples and Hong Kong International Airport, the Dubai International Airport is the most common hub for passengers traveling from Naples to China (absorbing 22% of passengers), closely followed by both the Zurich Airport (20%) and the Istanbul airport (19%). Other relevant international hubs are: Frankfurt (15%), Paris Charles de Gaulle (12%) and Amsterdam (6%) airports.

Figure 53: Main intermediary hubs in the Naples- Hong Kong routes

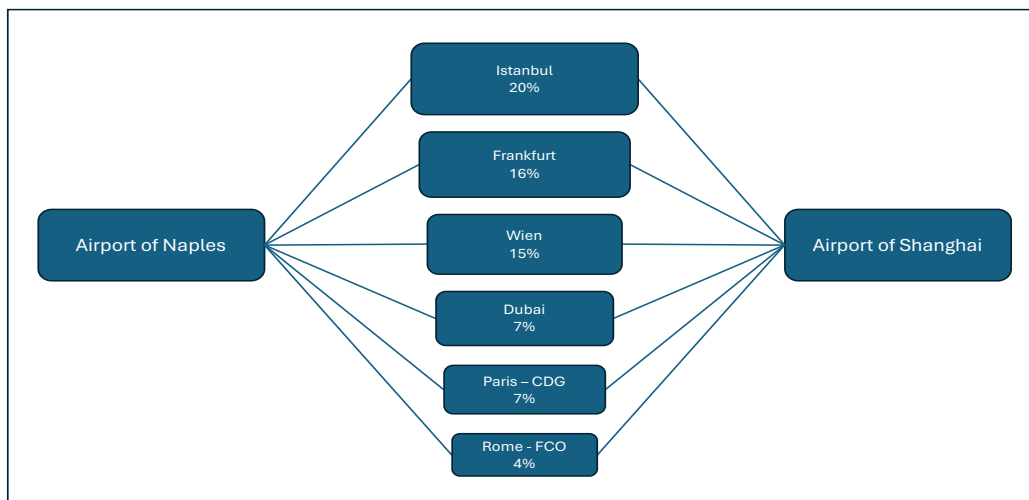


Source: Authors' elaboration on data from the Airport of Naples Capodichino

The Istanbul Airport is the most important hub for passengers traveling from Naples to Shanghai Pudong International Airport, Beijing Capital International Airport and Guangzhou Baiyun International Airport. Concerning the Naples-Shanghai indirect routes, 20% of passengers use the Istanbul airport as a hub for connections, while the airports of Frankfurt and Wien matter for 16% and 15% of total passengers, respectively. Dubai (DXB), Rome Fiumicino (FCO) and Paris Charles De Gaulle airports play a less relevant role in connecting Naples and China.



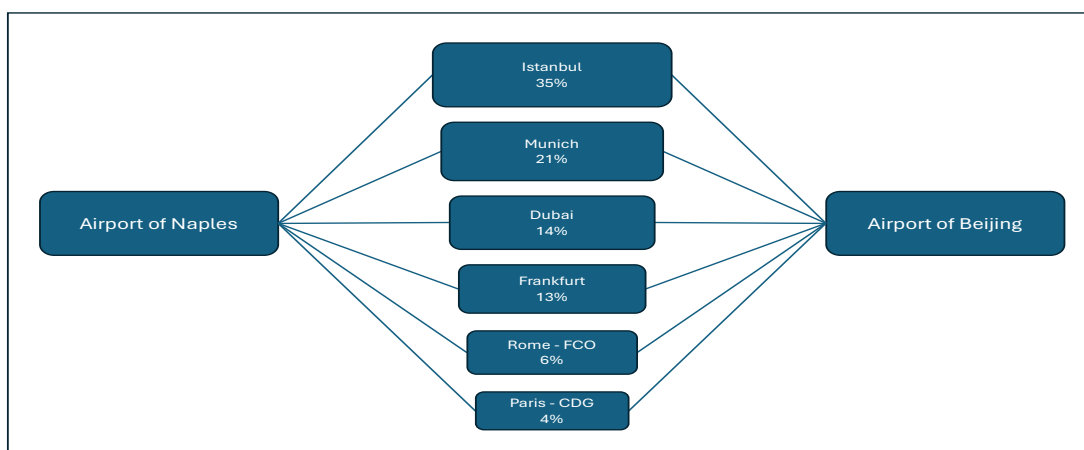
Figure 54: Main intermediary hubs in the Naples-Shanghai routes



Source: Authors' elaboration on data from the Airport of Naples Capodichino

The passenger flow between Naples and Beijing involves passengers transiting through key international hubs such as Istanbul, Munich (21%), and Dubai (14%). Since there are no direct flights from Naples to Beijing, travellers usually connect through one of these major airports, each serving as an important transit point on the way to China. Many passengers first fly from Naples International Airport to Istanbul Airport (IST) (35% of total passengers), where they transfer to flights heading to Beijing Capital International Airport (PEK). Alternatively, 21% of travelers connect through Munich Airport (MUC), a major hub for flights to China, where they can board direct flights to Beijing. Another common route is through Dubai International Airport (DXB) (14%).

Figure 55: Main intermediary hubs in the Naples-Beijing routes



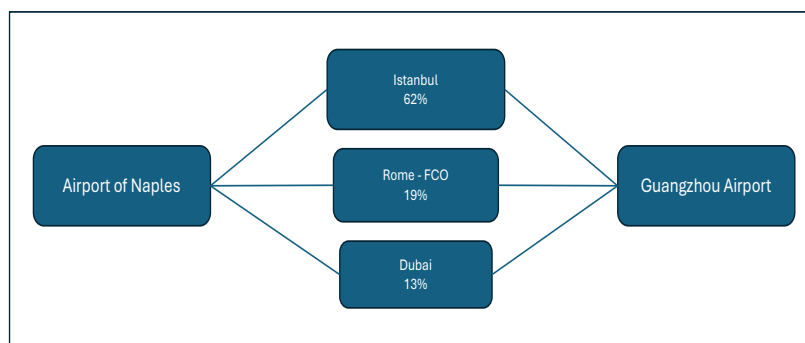
Source: Authors' elaboration on data from the Airport of Naples Capodichino





The majority of passengers traveling between Naples and Guangzhou transit through Istanbul Airport (IST), accounting for approximately 65% of the total flow. A smaller portion of passengers transfer at Rome Fiumicino Airport (FCO) and the Dubai International Airport (DXB), which serve as transit points for around 19% and 13% of passengers flying between the two areas.

Figure 56: Main intermediary hubs in the Naples-Guangzhou routes



Source: Authors' elaboration on data from the Airport of Naples Capodichino

These international hubs, each offering multiple daily connections, play a vital role in facilitating travel between Naples and Beijing, providing diverse options for passengers. Despite the absence of direct flights, these major airports help facilitate efficient travel, offering diverse options for onward journeys to China. A major role is played by the Istanbul Airport (IST), which is strategically located and offers a wide range of connecting flights, providing flexibility for passengers traveling between the catchment area and China.



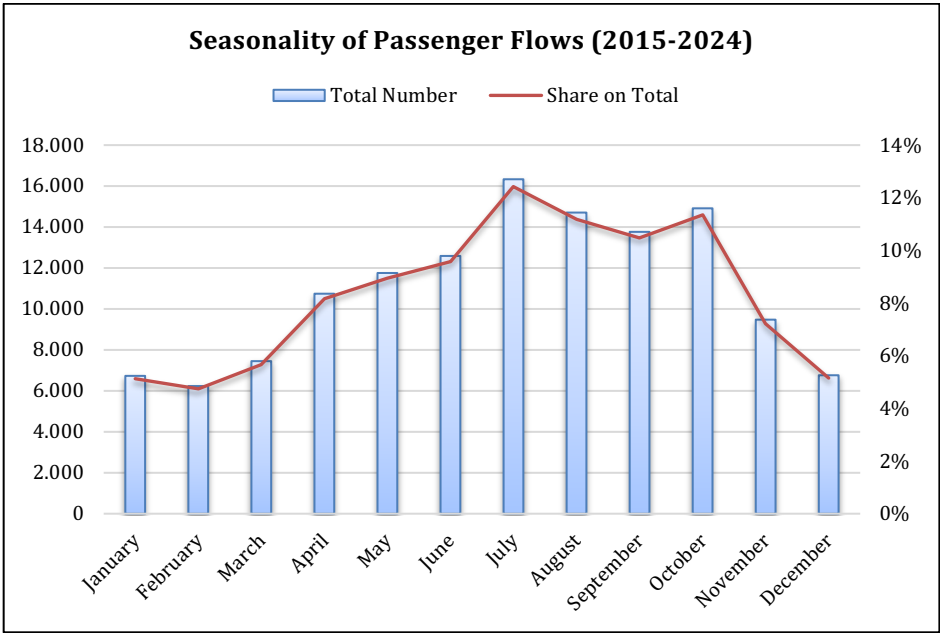
Seasonal patterns

Air traffic between Naples and China exhibits two distinct seasonal peaks, one occurring in June-July and the other in October, driven by a combination of academic, cultural, and tourism-related factors.

The first peak in July marks the middle of summer. While it is not associated with a specific national holiday, this peak coincides with a time when many people in both countries are on summer vacation due to the school and work breaks. Moreover, it is a period of favourable weather conditions in both China and Italy, making it an ideal time for tourism. Furthermore, the early summer months see an increase in Chinese tourists seeking European destinations as part of their summer vacation plans.

The second peak occurs in October and may be primarily influenced by the "National Day Golden Week" in China, a major seven-day holiday celebrating the founding of the People's Republic of China. This holiday prompts a significant rise in outbound travel, with many Chinese citizens traveling abroad to enjoy extended vacations. During this period, air traffic between China and European destinations increases sharply as both leisure and business travellers take advantage of the long break. Additionally, October marks the beginning of the autumn season in Italy, a period known for mild weather. The combination of the National Day holiday and the appeal of Italy's autumn climate might be a key to interpreting this surge in air traffic during this time.

Figure 57: Seasonal patterns of the Naples-China routes



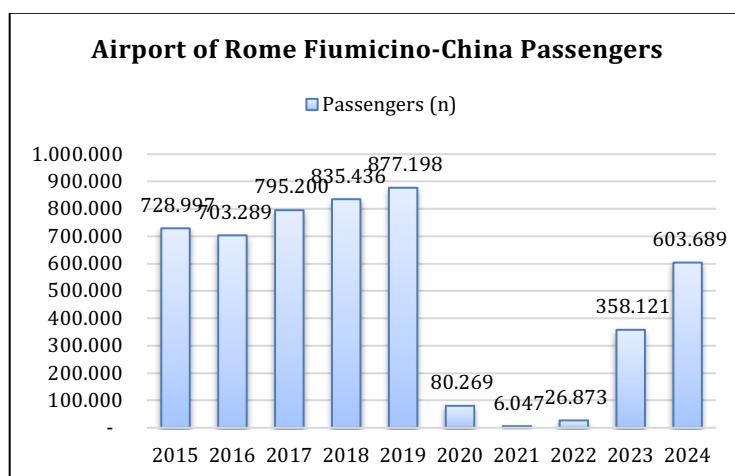
Source: Authors' elaboration on data from the Airport of Naples Capodichino

3.2. Flights between China and other representative Italian airports

To provide more in-depth evidence on the passenger traffic between Italy and China, this section provides an insight into the trends registered in two representative Italian airports: the Airport of Rome Fiumicino (FCO) and the Airport of Venezia “Marco Polo”.

Concerning the former, it is the busiest Italian airport - with around 50 million passengers in 2024 (data from Assoeroporti) – and that with the highest number of direct connections with Chinese airports. Indeed, the Airport of Rome Fiumicino benefits from direct connections with the Airports of Shanghai, Beijing, Wenzhou, Chengdu and Guangzhou (a direct flight between Rome and Wuhan had been established, but it ceased in October 2021). The relative proximity of this airport to Naples – being the distance around 250 kilometres – makes it the main alternative for passengers living in the catchment area and willing to take a direct flight to China. Therefore, analysing figures on the main trends of passenger flows from/to the Airport of Fiumicino might provide interesting insights into travellers’ movement decisions after the pandemic. As of 2024, the total number of passengers flying between Rome and China amounted to 604 thousand. Notwithstanding the clear growth compared to 2022 and 2023, the value reported in 2024 is still far below the record figure of 877 thousand reported in 2019, with a recovery rate equal to about 69%.

Figure 58: Direct and Indirect passengers between the Airport of Rome Fiumicino and China

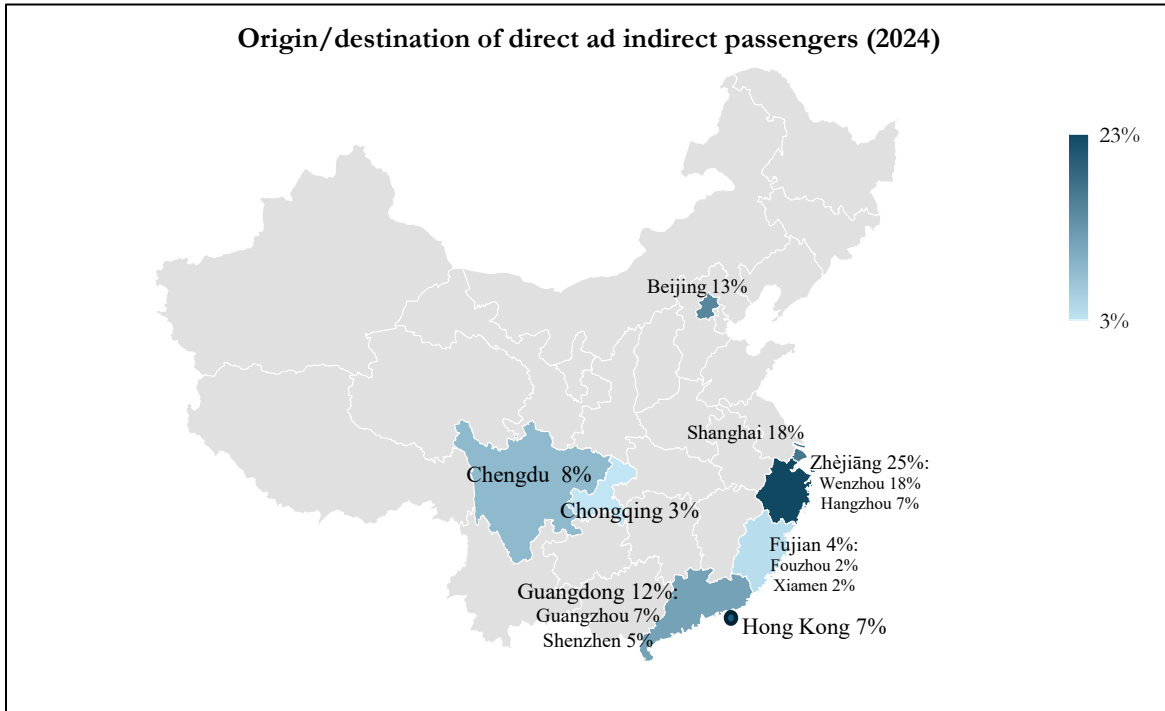


Source: Authors' elaboration on data from the Airport of Naples Capodichino

In 2024, a large share of the direct and indirect passengers between China and the Airport of Rome Fiumicino has flown through the airports of Wenzhou (18% of total passengers), Shanghai (18%) and Beijing (13%). Overall, except Beijing, most of the passengers in the Airport of Rome Fiumicino come from / are directed to the Southern coastal area of the country, more precisely from the Provinces of Zhejiang (25%), Guangdong (12%), Fujian (4%) and the special administrative region of Hong Kong (7%).



Figure 59: Origin/destination of passengers flying between the Airport of Rome Fiumicino and China



Source: Authors' elaboration on data from the Airport of Naples Capodichino

Venice "Marco Polo" Airport represents the second relevant case study for the analysis of passenger flows between Italy and China within the scope of this report. In particular, it is the most recent Italian airport where a direct air connection with China has been introduced, with the first Venice-Shanghai flight landing on 26 September 2024. For this reason, analyzing the evolution of monthly passenger traffic between the two cities may provide useful insights into the response of demand to the introduction of a direct route. In this context, monthly data show that the activation of the direct connection might have partially contributed to a recovery in passenger volumes in the final months of 2024, thus suggesting a positive response from the market.⁴⁶

As a matter of fact, in the first nine months of 2024 (January - September), a lower presence of Chinese passengers was registered in the Airport of Venice compared to the same months of the pre-pandemic period (2015-2019 average). In this period, the recovery rate ranged between 67% (September) and 51% (May). After September 2024, despite still signalling lower passenger traffic between China and Venice, the volume of passengers increased up to values increased to 83% (November 2024) and 86%

⁴⁶ The recovery rate was computed as the ratio between the number of passengers flying between Venice and China in a given month of 2024 and the (average) number of passengers on the same routes in the period 2015-2019.



(October and December) of that reported in the 2015-2019 period. These figures show a sensible reduction of the gap in the number of passengers flying between the two areas after the introduction of the direct connection.

Table 21: Passenger flows and recovery rates between VCE and PVG

Month	2015-2019	2024	Recovery Rate
January	8,586	5,459	64%
February	7,414	4,626	62%
March	9,131	5,427	59%
April	9,254	5,414	59%
May	10,068	5,138	51%
June	10,703	6,717	63%
July	12,305	7,061	57%
August	11,853	7,371	62%
September	12,044	8,052	67%
October	10,855	9,289	86%
November	8,501	7,029	83%
December	7,466	6,387	86%

Source: Authors' elaboration on data from the Airport of Naples Capodichino

More in detail, the recovery mainly concerned passenger volumes on the Venice-Shanghai Pudong International Airport route. Even before the introduction of the direct connection, this route represented the busiest among indirect connections between Venice and China.

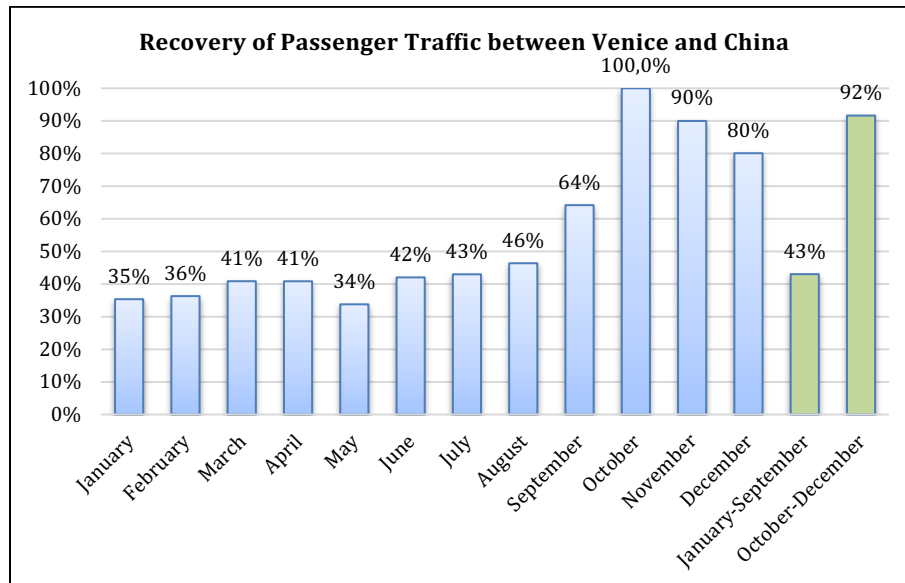
Following the easing of travel restrictions and the abolition of the Zero-COVID policy in China, passenger volumes between Shanghai and Venice began to gradually recover. However, as of September 2024, the recovery remained partial, with traffic reaching approximately 43% of pre-pandemic levels (with a monthly peak of 64% in September).

Following the easing of travel restrictions and the abolition of the Zero-COVID policy in China, passenger volumes between Shanghai and Venice began to gradually recover. However, as of September 2024, the recovery remained partial, with traffic reaching approximately 43% of pre-pandemic levels (with a monthly peak of 64% in September).

In the last three months of the year" a "december (90% and 80% respectively)" con "A significant acceleration was observed in the final quarter of the year. In the last three months of 2024, the recovery rate increased to 92%, driven by a full recovery of passenger volumes in October (compared to October 2019) and an almost complete recovery in November and December (90% and 80%, respectively).



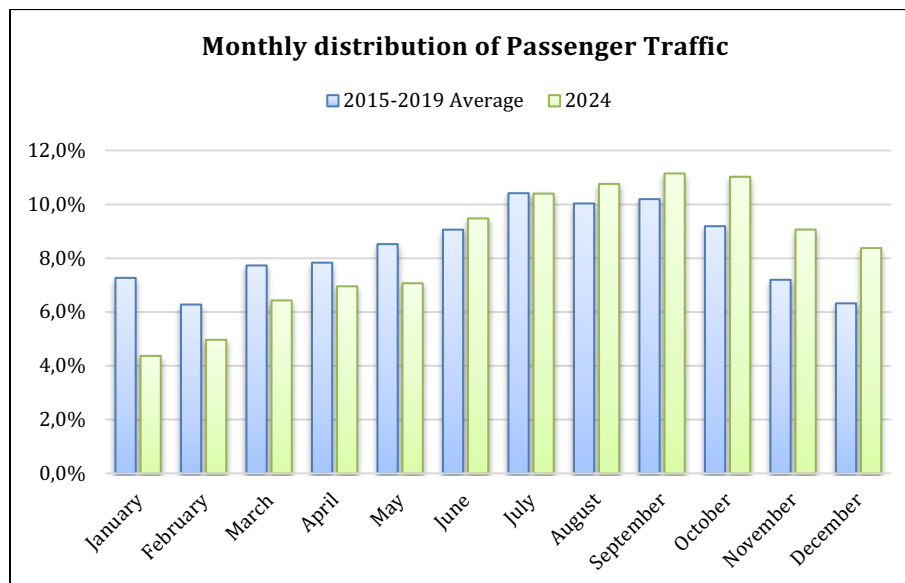
Figure 60: Recovery of the Shanghai-Venice passenger volumes



Source: Authors' elaboration on data from the Airport of Naples Capodichino

This is also evident when looking at the monthly distribution of passengers on the route in the two considered periods (2015-2019 and 2024). It emerges that, in 2024, there was an above-average concentration of passengers in the last months of the year (i.e., after the introduction of the direct flight): this might be a signal of the preference of travelers for a direct connection when booking.

Figure 61: Monthly distribution of Shanghai-Venice passengers



Source: Authors' elaboration on data from the Airport of Naples Capodichino



Conclusions

Enrico Maria Fardella, Giorgio Prodi, Antonio Barreca

The findings of this report highlight the growing importance of economic, cultural, and tourism interactions between China and the catchment area, providing a foundation for considering a direct flight connection between Naples and China. While the study was designed to offer an accurate and broad analysis of these relationships, it has identified several promising areas that would benefit from further strategic focus to fully harness their potential.

Economically, the catchment area has seen consistent, albeit modest, growth in its interactions with China. China has become a significant supplier for the region, yet exports from the catchment area to China remain relatively low, and the overall trade volume has not exhibited a particularly dynamic growth rate. While the sustained presence of Chinese investments and businesses in the region offers some promise, at this stage, these economic ties do not appear to be robust enough to justify the expectation of a substantial business clientele for a direct air link. That said, fostering the diversification of exports and seeking out new business opportunities could help strengthen these relationships in the future.

In terms of cultural and academic exchanges, the situation is more encouraging. There has been a clear expansion of partnerships between local universities and their Chinese counterparts, and these collaborations serve as an important channel for fostering deeper integration and knowledge-sharing. However, the real challenge lies in converting these academic ties into tangible economic outcomes, particularly those that could benefit tourism and cross-border business interactions.

The tourism sector, on the other hand, appears to offer far greater potential. The revival of Chinese tourism to Italy, and to Naples specifically, signals a growing interest in the region. Projections suggest that by 2025, tourism flows to Naples may well return to pre-COVID levels, which could represent a significant opportunity for the local economy. The increasing number of Chinese visitors, coupled with their engagement with local attractions, suggests that there is room for further growth, particularly if the region tailors its offerings more effectively to Chinese tourists' preferences. Enhanced promotional strategies, more localized services, and a stronger digital presence are key to expanding this sector.

Digital engagement has become a powerful tool in attracting Chinese travelers, with platforms such as Xiaohongshu gaining traction in showcasing Naples. This growing online visibility indicates that the region's potential as a tourist destination in China has not yet been fully realized. By leveraging this opportunity more strategically, Naples could increase its appeal among Chinese tourists and create stronger incentives for sustained tourism flows.



From an infrastructural standpoint, the catchment area is well-equipped to support the development of a direct flight link to China. The Naples International Airport, alongside its intermodal transport facilities and seaports, offers the logistical foundation required for both passenger and cargo services. However, further improvements in airport infrastructure, airline partnerships, and flight options would be necessary to ensure the success of such a route in the long term.

The trends highlighted in this report suggest that a direct flight connection between Naples and China, though not without its challenges, holds considerable promise—particularly from the perspective of tourism. While economic ties are currently less dynamic and do not yet justify a robust business market, the tourism sector presents a much more immediate and viable opportunity for growth. A focused approach that capitalizes on cultural synergies, digital engagement, and tourism growth will be essential for ensuring the sustainability of direct air travel.

In conclusion, this report offers the most comprehensive and detailed overview of the China-catchment area relationship available to date. While its primary goal was to provide a thorough analysis of current trends, the findings suggest that a more targeted, strategic approach to promoting tourism and deepening economic links is required. By addressing these opportunities, policymakers and stakeholders can create the favorable conditions necessary for the successful establishment of a direct flight route, fostering greater bilateral growth and mutual benefit.



List of Tables

- Table 1:** Number of activities owned by residents with Chinese citizenship
- Table 2:** Territorial distribution of Chinese-led activities
- Table 3:** Sectoral distribution of Chinese-led activities
- Table 4:** Imports and exports partner of the Catchment area (2023)
- Table 5:** Relevance of trade flows of the catchment area on total national trade
- Table 6:** Import and export towards China in the catchment area
- Table 7:** Sectoral export to China from the catchment area (2014-2023)
- Table 8:** Sectoral imports from China in the catchment area (2014-2023)
- Table 9:** Distribution of the Chinese community in the catchment area
- Table 10:** Size and Balance of the Chinese community in the catchment area
- Table 11:** Residence permits issued for work reasons in Italy and the catchment area
- Table 12:** Twinning agreement in force
- Table 13:** Cooperation Agreements between Chinese and local Universities
- Table 14:** Participants in “China-Italy Science, Technology and Innovation Week”
- Table 15:** Chinese tourists in Italy (Millions)
- Table 16:** Chinese tourism arrivals and presence (2022-2023)
- Table 17:** Chinese tourism arrivals and presence (2022-2024)
- Table 18:** Chinese arrivals and presence in the main tourist destination in Campania (2022-2024)
- Table 19:** List of keywords
- Table 20:** Thematic categories
- Table 21:** Passenger flows and recovery rates between VCE and PVG



List of Figures

Figure 1: Chinese-led economic activities among macro-sectors

Figure 2: Inward and Outward Foreign Direct Investments

Figure 3: Trade between China and Italy

Figure 4: Growth rate of imports and exports from/to China

Figure 5: Trade flows between the catchment area and China

Figure 6: Growth rate of trade flows from/to China

Figure 7: Spatial distribution of imports and exports from/to China in the catchment area

Figure 8: Freight handled in the Ports of the Catchment area

Figure 9: Distribution of the key commercial infrastructure in Campania

Figure 10: Sectoral export to China from the catchment area (2023)

Figure 11: Sectoral imports from China in the catchment area (2023)

Figure 12: Spatial distribution of the Chinese Community in Italy

Figure 13: Main foreign communities in the catchment area

Figure 14: Spatial distribution of the Chinese community in the catchment area

Figure 15: Number of Chinese citizens in the catchment area

Figure 16: Demography of the Chinese community in the catchment area

Figure 17: Marriages between Italian and Chinese spouses

Figure 18: Residence permits – reasons

Figure 19: Italian community in the world

Figure 20: Italian Community in China

Figure 21: Number of Agreements with Universities
in the catchment area in Chinese Provinces

Figure 22: Number of students with a Chinese diploma per academic year

Figure 23: Scientific and Technological agreements between
China and the catchment area



- Figure 24:** Territorial distribution of S&T agreements
- Figure 25:** Cultural activities on the catchment area in China
- Figure 26:** Chinese Cultural Events in the catchment area
- Figure 27:** Passenger volume for airlines 2023-2024
- Figure 28:** Average length of stay for Chinese tourists
- Figure 29:** Preference for Accommodation
- Figure 30:** Accompanying for travel
- Figure 31:** Chinese Tourist Trip Budget
- Figure 32:** Answer [Multiple] to the question “If you can visit Italy, which cities do you prefer?”
- Figure 33:** Answer [Multiple] to the question “Which destination is best for the following travel aspects? [Matrix]”.
- Figure 34:** N. of Chinese tourism arrivals and presence (2022-2024)
- Figure 35:** Main tourist destination in Campania
- Figure 36:** Tax-free shopping expenditure (% of total)
- Figure 37:** Average Expenditure of Chinese Tourists
- Figure 38:** Consumption preference of Chinese tourists in tax-free shopping
- Figure 39:** Netizen Size and Internet Penetration from Jun. 2022 to Jun. 2024
- Figure 40:** Most searched cities from the catchment area on Xiaohongshu
- Figure 41:** Means of transportations to reach Naples
- Figure 42:** Means of transportation used to travel around Naples
- Figure 43:** Attractions in the catchment area for Chinese tourists
- Figure 44:** How Chinese tourists describe the safety of destinations
- Figure 45:** Most searched words related to Naples
- Figure 46:** Douban ranking of the best-selling books in China in 2017. “L’Amica Geniale” holds the first position.
- Figure 47:** Promotional brochure from the Chinese publishing house



Figure 48: Naples Sites from “L’Amica Geniale”

Figure 49: Number of passengers in the Italian Airports

Figure 50: Passenger flying between the catchment area and China

Figure 51: Origin/Destination of Naples-China passenger flows (2015-2019)

Figure 52: Origin/Destination of Naples-China passenger flows (2015-2019)

Figure 53: Main intermediary hubs in the Naples- Hong Kong routes

Figure 54: Main intermediary hubs in the Naples-Shanghai routes

Figure 55: Main intermediary hubs in the Naples-Beijing routes

Figure 56: Main intermediary hubs in the Naples-Guangzhou routes

Figure 57: Seasonal patterns of the Naples-China routes

Figure 58: Direct and Indirect passengers between the Airport
of Rome Fiumicino and China

Figure 59: Origin/destination of passengers flying between
the Airport of Rome Fiumicino and China

Figure 60: Recovery of the Shanghai-Venice passenger volumes

Figure 61: Monthly distribution of Shanghai-Venice passengers





IL TORCOLIERE • Officine Grafico-Editoriali d'Ateneo

Università di Napoli L'Orientale
stampato nel mese di luglio 2026

