ENIT BULLETIN

In-depth analysis of tourism trends

Focus: Immaculate Conception Long Weekend

6 December 2022

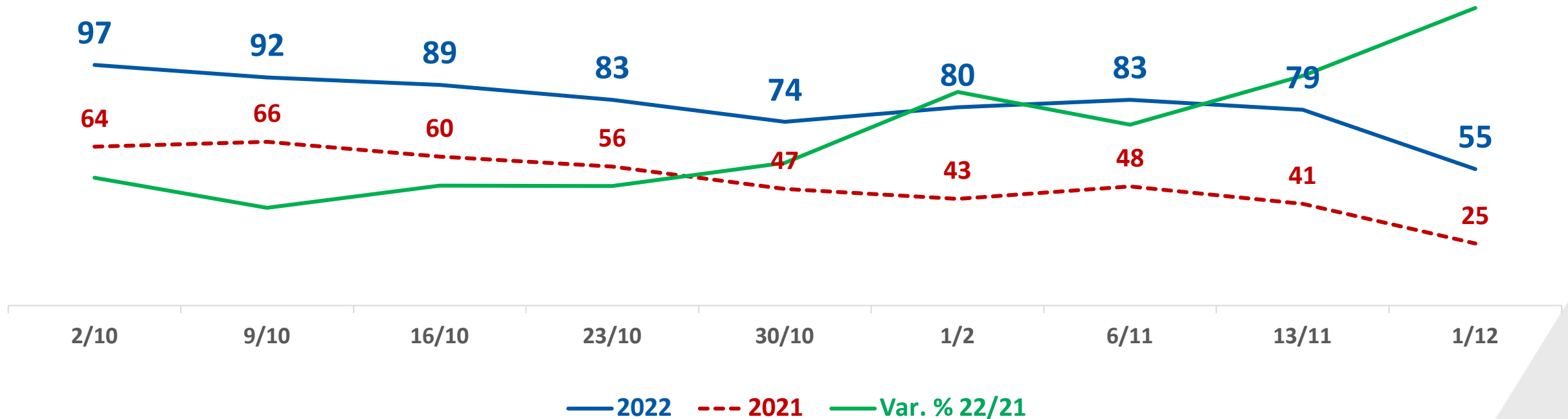By the

Research Department

ENIT - ITALIAN NATIONAL TOURIST BOARD

Interest among international tourists for visiting Italy

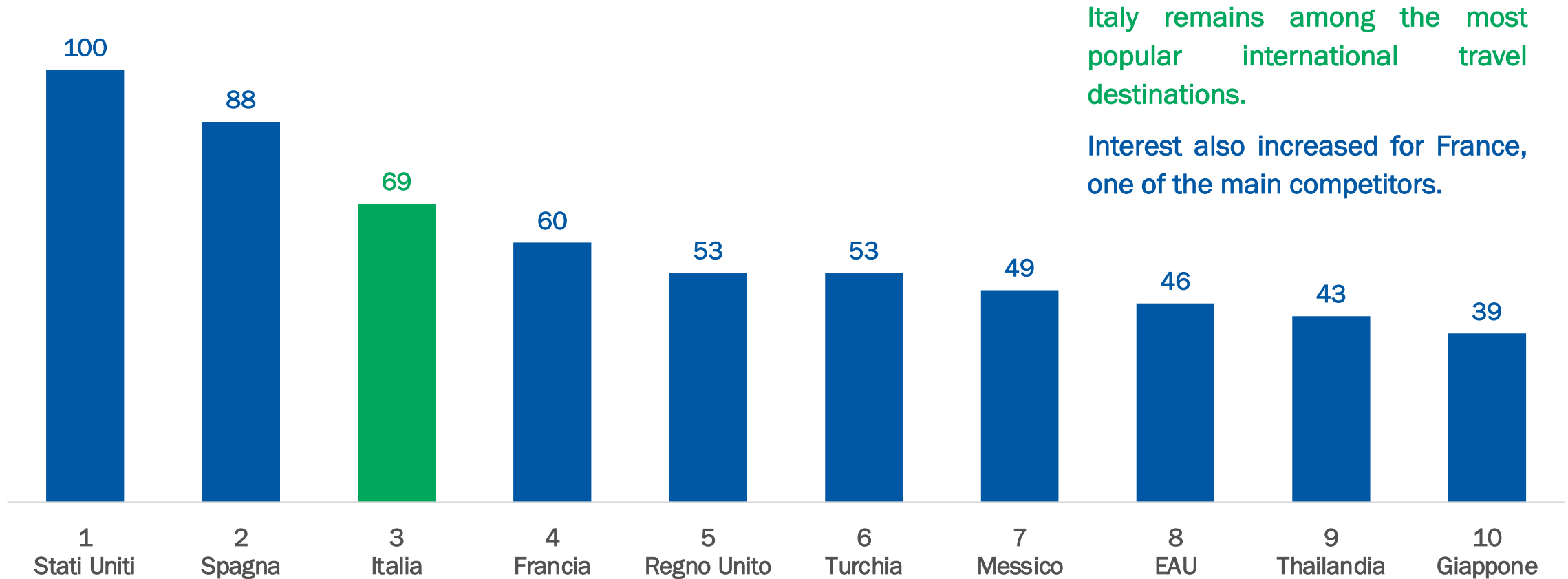## Accommodation searches on Google for trips to Italy over the last 2 months

Compared with the same period in 2021, research data for visits to Italy shows **a higher % variation on the first of November (+86%) and the first of December(+120%).**
The average for the two months is +70.0%.

2/10	9/10	16/10	23/10	30/10	1/2	6/11	13/11	1/12

2022 data (blue): 97, 92, 89, 83, 74, 80, 83, 79, 55

2021 data (red dashed): 64, 66, 60, 56, 47, 43, 48, 41, 25

Var. % 22/21 (green): values rising to the right

── 2022   --- 2021   ── Var. % 22/21

ENIT AGENZIA NAZIONALE DEL TURISMO

Ranking of Italy in terms of interest for international travel

Accommodation searches on Google for international travel over the last 2 months

Italy remains among the most popular international travel destinations.

Interest also increased for France, one of the main competitors.

	Stati Uniti	Spagna	Italia	Francia	Regno Unito	Turchia	Messico	EAU	Thailandia	Giappone
Value	100	88	69	60	53	53	49	46	43	39
Rank	1	2	3	4	5	6	7	8	9	10

Source: ENIT Research Department using Google Destination Insights (for the period from 01/10/2022 to 01/12/2022) – All the data is indexed

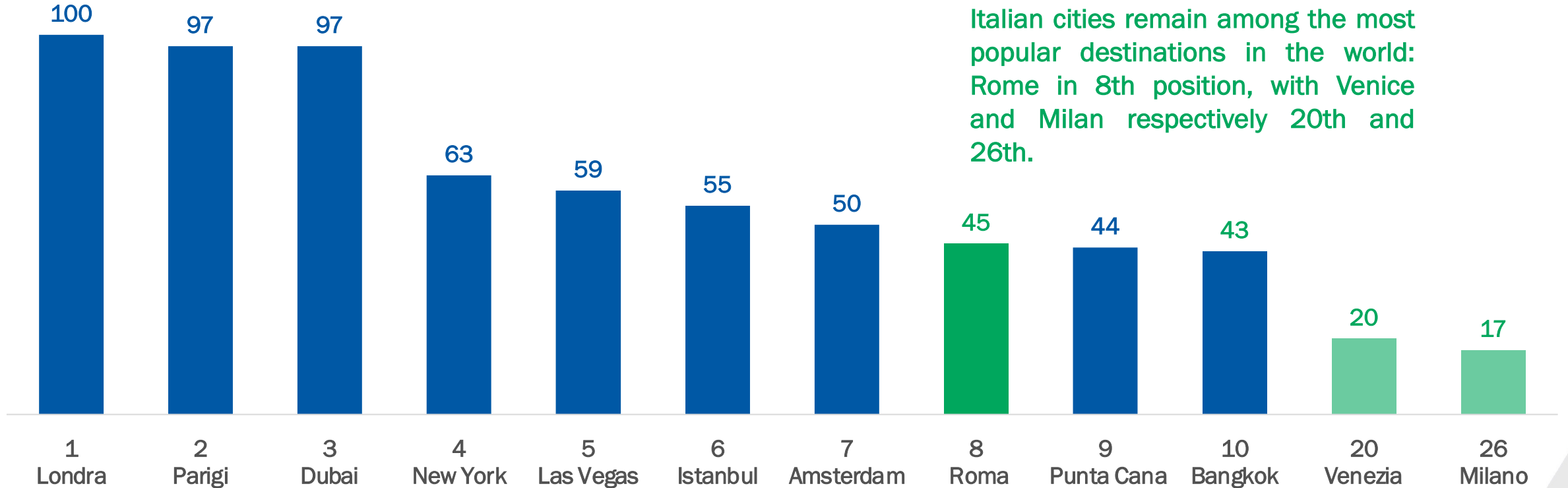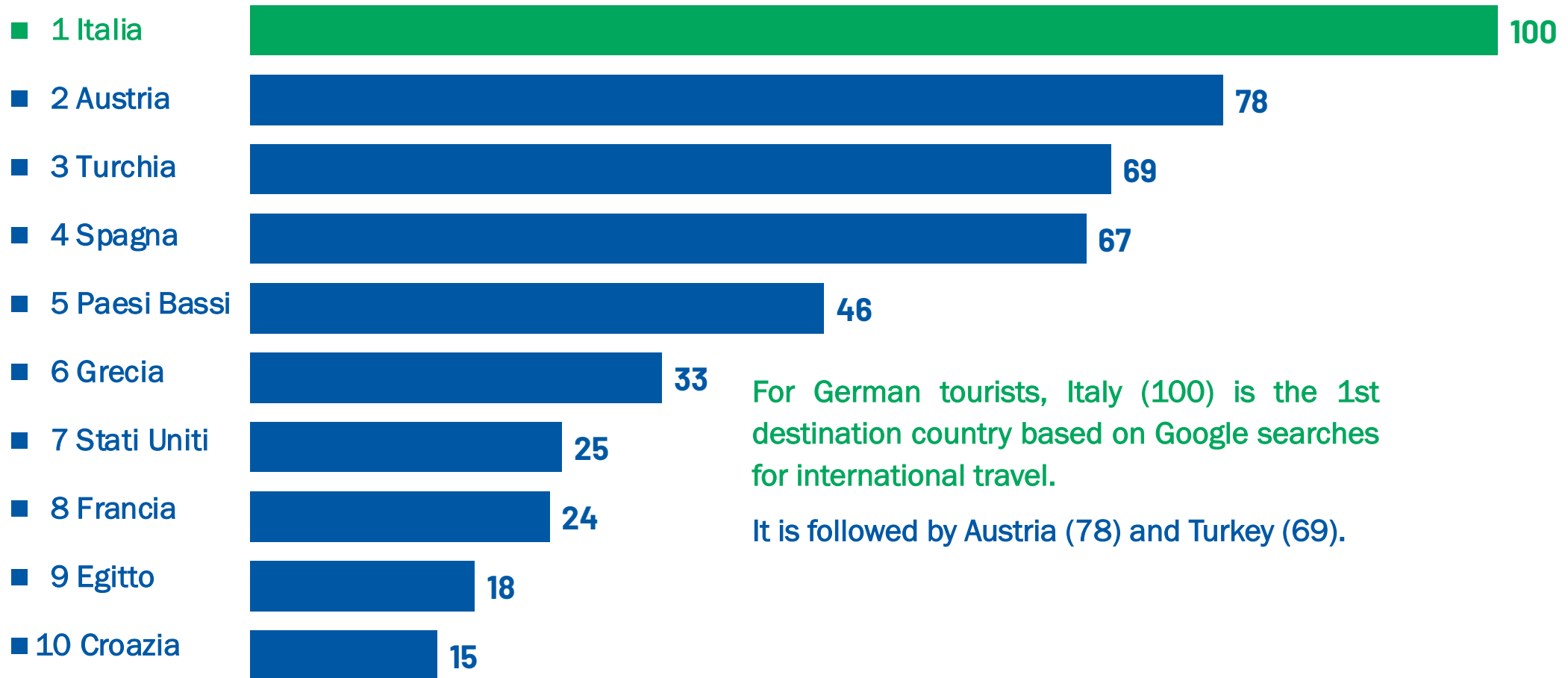# Ranking of Italy in terms of interest for international travel

Accommodation searches on Google for international travel over the last 2 months

Italian cities remain among the most popular destinations in the world: Rome in 8th position, with Venice and Milan respectively 20th and 26th.

Rank	1	2	3	4	5	6	7	8	9	10	20	26
City	Londra	Parigi	Dubai	New York	Las Vegas	Istanbul	Amsterdam	Roma	Punta Cana	Bangkok	Venezia	Milano
Value	100	97	97	63	59	55	50	45	44	43	20	17

ENIT 1919
AGENZIA NAZIONALE DEL TURISMO

The main countries interested in Italy

Accommodation searches on Google for trips to Italy over the last 2 months

The countries most interested in Italy based on travel searches on Google are Germany (100), USA (42), France (25), Great Britain (23), and Austria (16).

100	42	25	23	16	13	13	7	5	4
1	2	3	4	5	6	7	8	9	10
Germania	Stati Uniti	Francia	Regno Unito	Austria	Spagna	Svizzera	Paesi Bassi	Canada	Belgio

Source: ENIT Research Department using Google Destination Insights (for the period from 01/10/2022 to 01/12/2022) – All the data is indexed

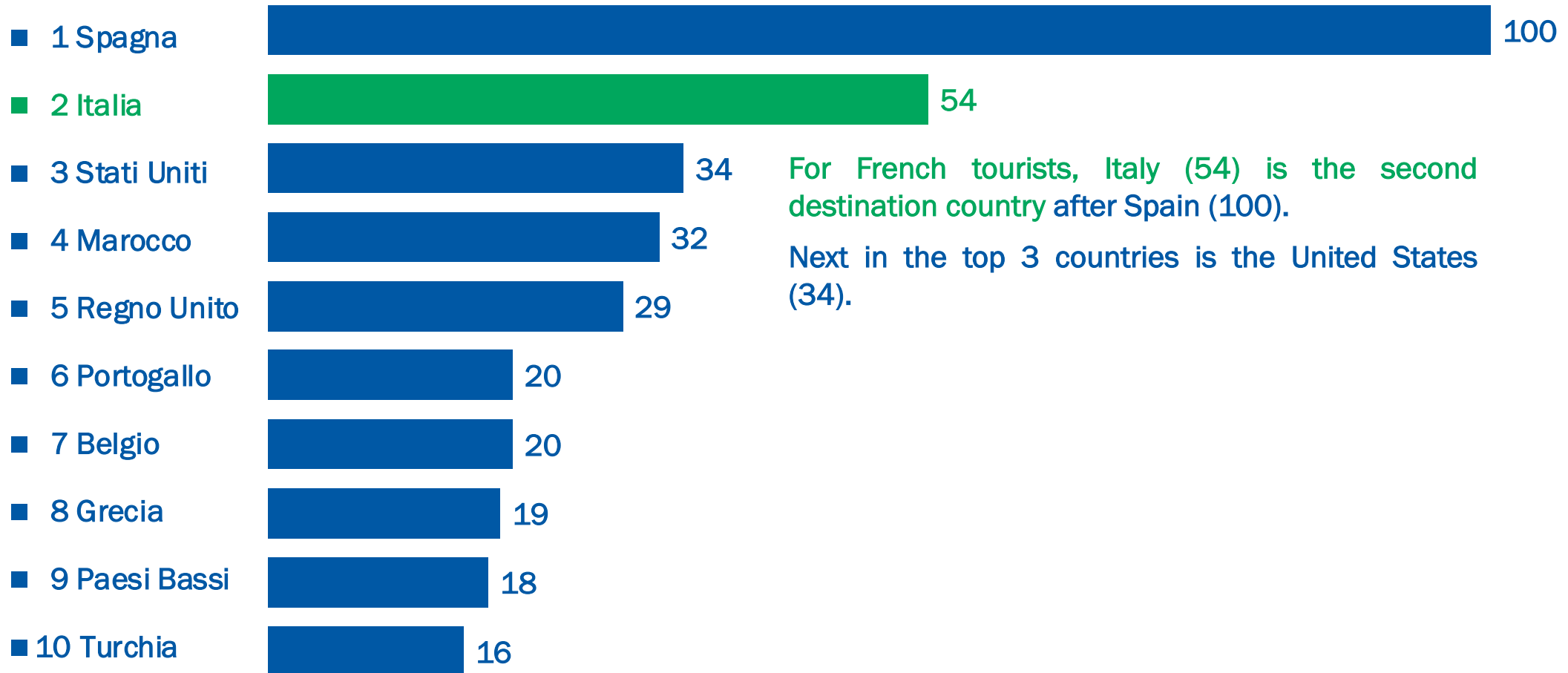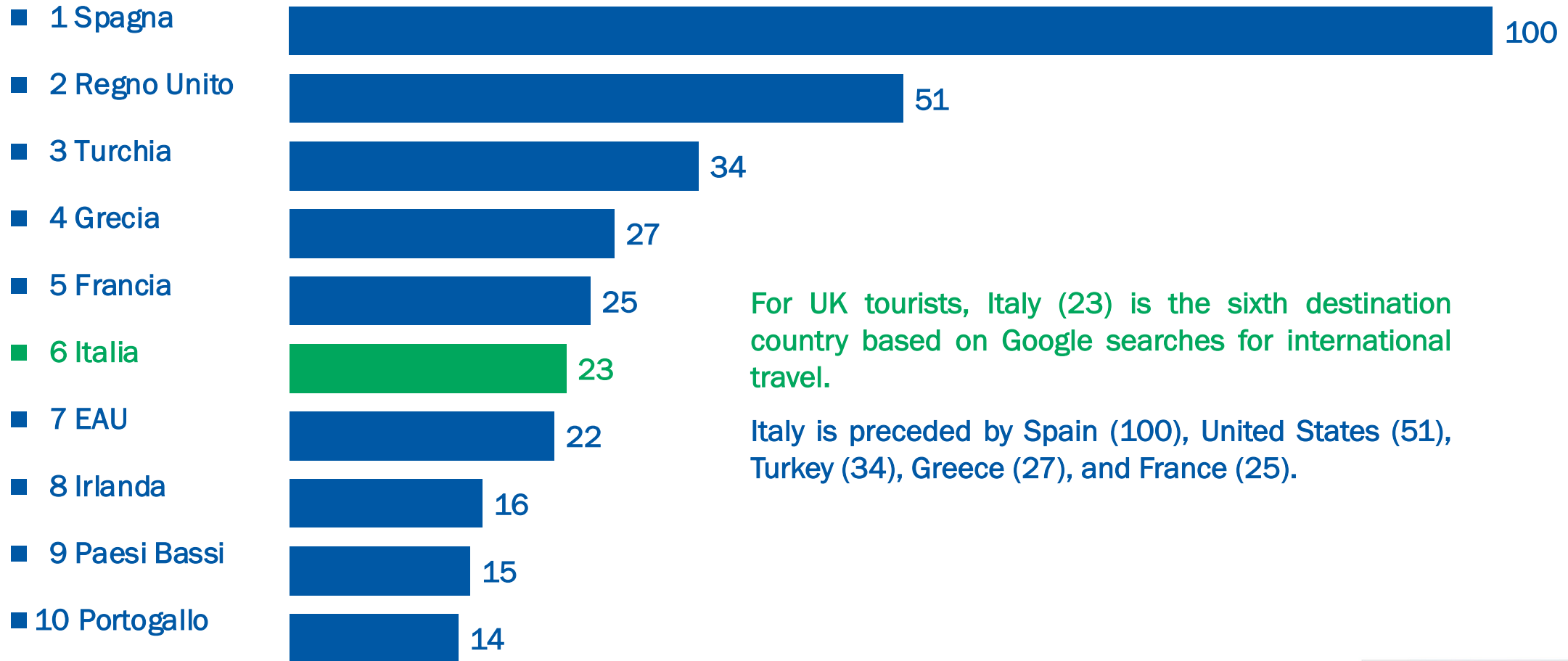# Main tourist destinations of interest for the German market

Accommodation searches on Google for international travel over the last 2 months

Rank	Destination	Value
1	Italia	100
2	Austria	78
3	Turchia	69
4	Spagna	67
5	Paesi Bassi	46
6	Grecia	33
7	Stati Uniti	25
8	Francia	24
9	Egitto	18
10	Croazia	15

For German tourists, Italy (100) is the 1st destination country based on Google searches for international travel.

It is followed by Austria (78) and Turkey (69).

Source: ENIT Research Department using Google Destination Insights (for the period from 01/10/2022 to 01/12/2022) – All the data is indexed

Main tourist destinations of interest for the French market

Accommodation searches on Google for international travel over the last 2 months

Rank	Destination	Value
1	Spagna	100
2	Italia	54
3	Stati Uniti	34
4	Marocco	32
5	Regno Unito	29
6	Portogallo	20
7	Belgio	20
8	Grecia	19
9	Paesi Bassi	18
10	Turchia	16

For French tourists, Italy (54) is the second destination country after Spain (100).

Next in the top 3 countries is the United States (34).

Source: ENIT Research Department using Google Destination Insights (for the period from 01/10/2022 to 01/12/2022) – All the data is indexed

Main tourist destinations of interest for the United Kingdom market

Accommodation searches on Google for international travel over the last 2 months

- 1 Spagna — 100
- 2 Regno Unito — 51
- 3 Turchia — 34
- 4 Grecia — 27
- 5 Francia — 25
- 6 Italia — 23
- 7 EAU — 22
- 8 Irlanda — 16
- 9 Paesi Bassi — 15
- 10 Portogallo — 14

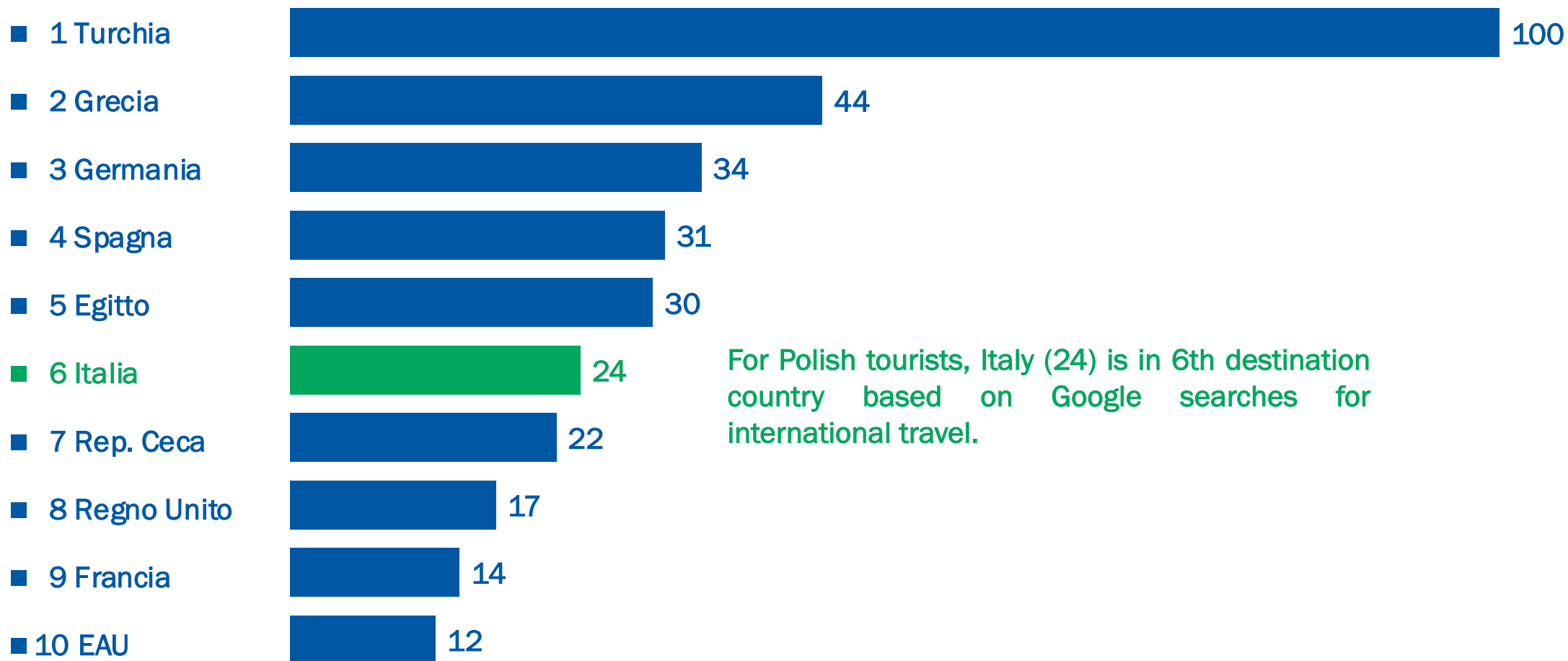For UK tourists, Italy (23) is the sixth destination country based on Google searches for international travel.

Italy is preceded by Spain (100), United States (51), Turkey (34), Greece (27), and France (25).

Source: ENIT Research Department using Google Destination Insights (for the period from 01/10/2022 to 01/12/2022) – All the data is indexed

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Main tourist destinations of interest for the Dutch market

Accommodation searches on Google for international travel over the last 2 months

Destination	Value
1 Spagna	100
2 Germania	89
3 Belgio	82
4 Francia	58
5 Turchia	51
6 Regno Unito	41
7 Stati Uniti	34
8 Italia	30
9 Austria	28
10 Grecia	24

For Dutch tourists, Italy (30) is the eighth destination country based on Google searches for international travel.

Source: ENIT Research Department using Google Destination Insights (for the period from 01/10/2022 to 01/12/2022) – All the data is indexed

ENIT 1919
AGENZIA NAZIONALE DEL TURISMO
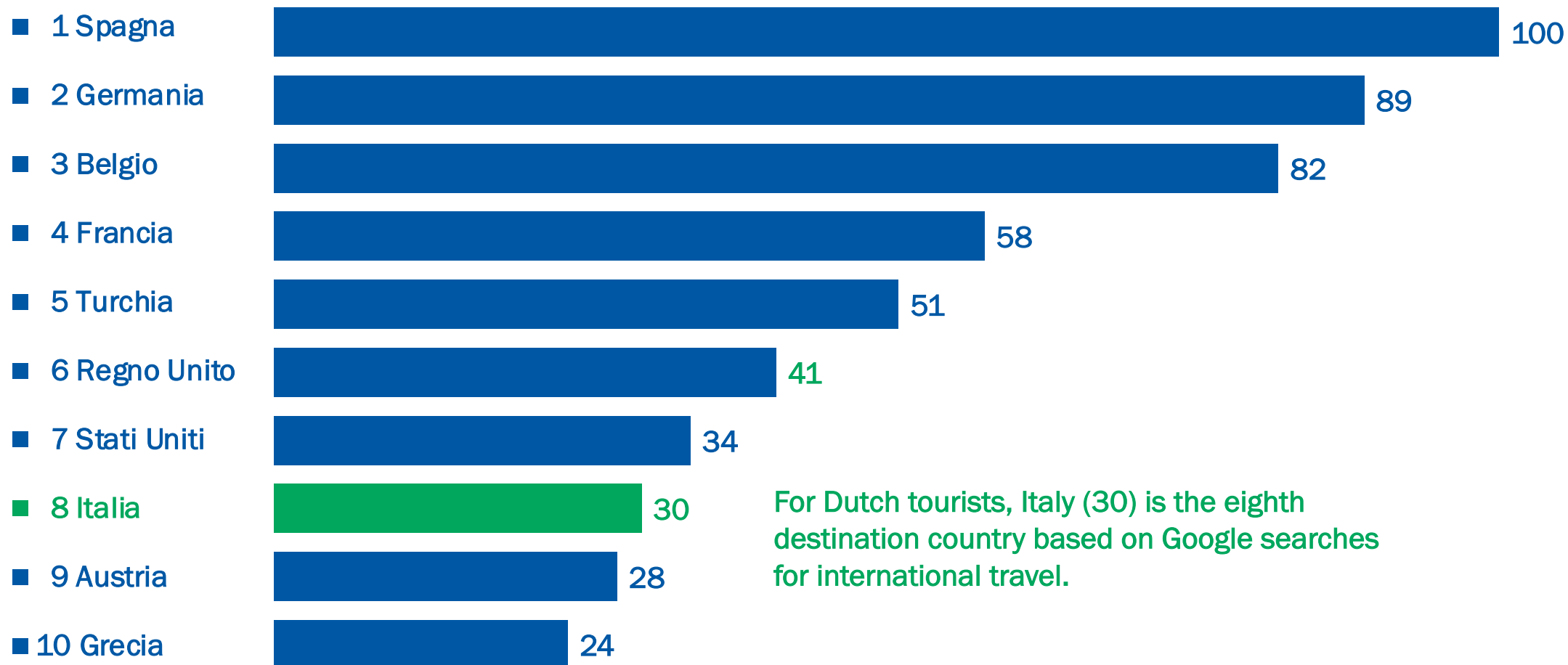
Main tourist destinations of interest for the Polish market

Accommodation searches on Google for international travel over the last 2 months

■ 1 Turchia		100
■ 2 Grecia		44
■ 3 Germania		34
■ 4 Spagna		31
■ 5 Egitto		30
■ 6 Italia		24
■ 7 Rep. Ceca		22
■ 8 Regno Unito		17
■ 9 Francia		14
■ 10 EAU		12

For Polish tourists, Italy (24) is in 6th destination country based on Google searches for international travel.

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Main tourist destinations of interest for the Belgian market
Accommodation searches on Google for international travel over the last 2 months

Rank	Destination	Value
1	Paesi Bassi	100
2	Francia	93
3	Spagna	63
4	Germania	31
5	Stati Uniti	27
6	Turchia	25
7	Italia	21
8	Regno Unito	18
9	Grecia	11
10	Austria	11

For Belgian tourists, Italy (21) is in seventh place among tourist destinations based on Google searches for international travel.

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Main tourist destinations of interest for the Spanish market
Accommodation searches on Google for international travel over the last 2 months

Rank	Country	Value
1	Francia	100
2	Italia	67
3	Portogallo	61
4	Regno Unito	56
5	Stati Uniti	42
6	Andorra	34
7	Marocco	18
8	Germania	18
9	Paesi Bassi	16
10	Rep. Dominicana	12

For Spanish tourists, Italy (67) is the second destination country based on Google searches for international travel.

ENIT 1919
AGENZIA NAZIONALE DEL TURISMO
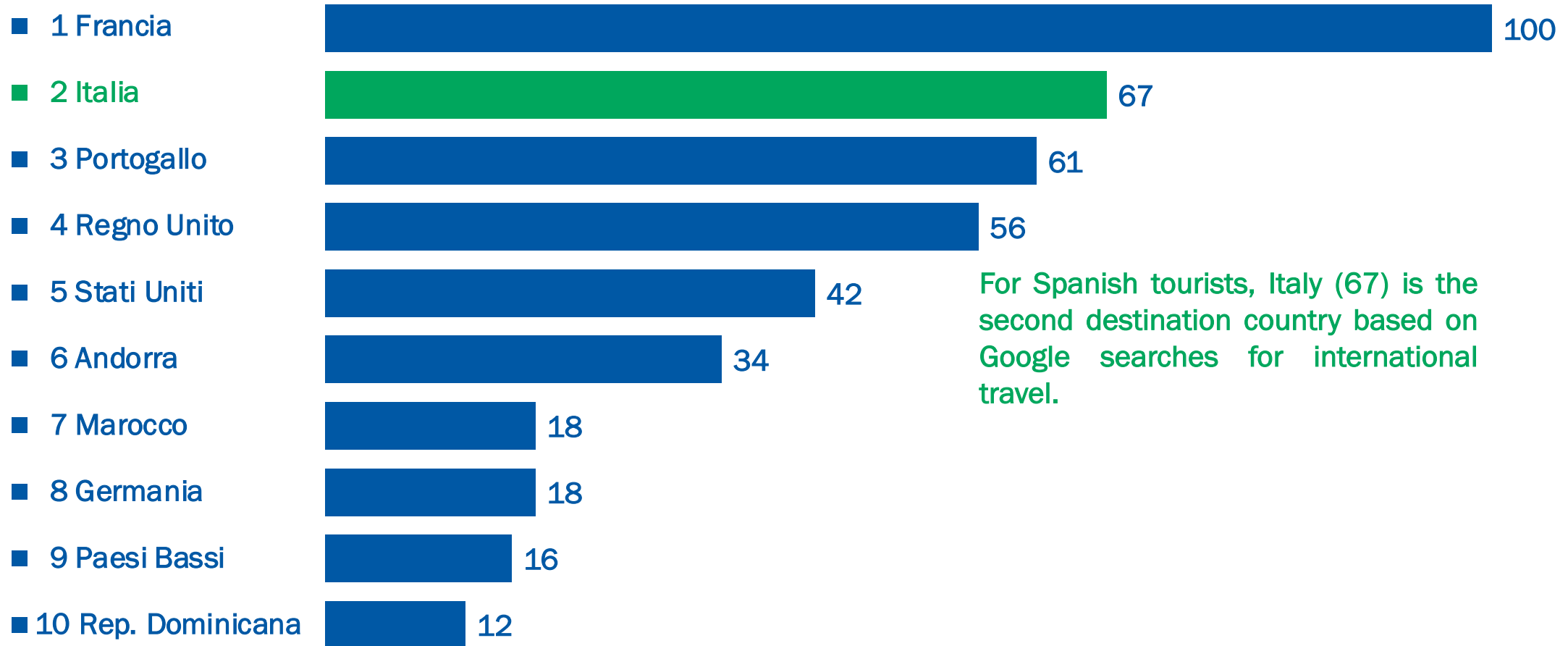
Main tourist destinations of interest for the Swiss market
## Accommodation searches on Google for international travel over the last 2 months

Rank	Destination	Value
1	Germania	100
2	Italia	89
3	Francia	73
4	Austria	40
5	Turchia	30
6	Spagna	30
7	Regno Unito	26
8	Stati Uniti	19
9	EAU	19
10	Egitto	12

For Swiss tourists, Italy (89) is the second destination country based on Google searches for international travel.

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO
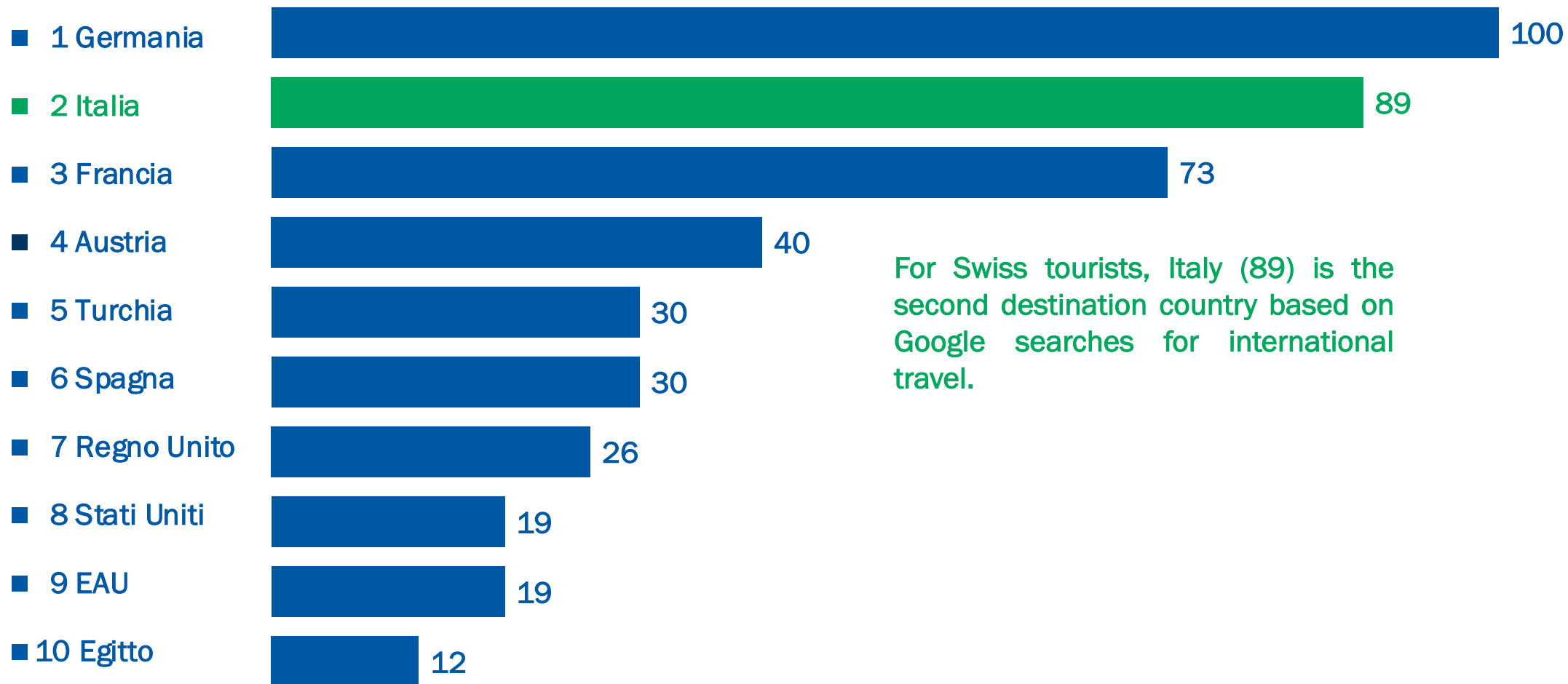
Main tourist destinations of interest for the Swedish market

Accommodation searches on Google for international travel over the last 2 months

Destination	Value
1 Spagna	100
2 Regno Unito	97
3 Danimarca	87
4 Stati Uniti	44
5 Franica	40
6 Germania	37
7 Norvegia	35
8 Turchia	34
9 Thailandia	32
10 Italia	26
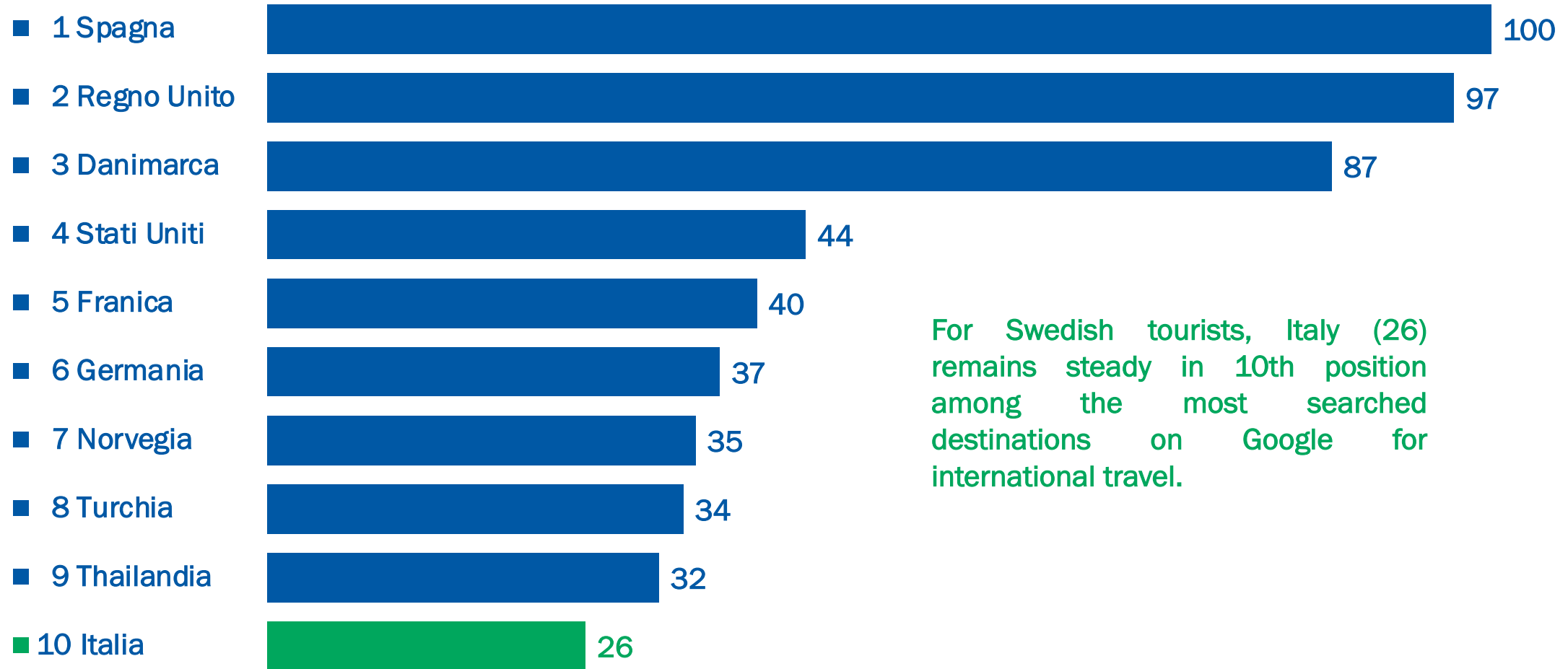
For Swedish tourists, Italy (26) remains steady in 10th position among the most searched destinations on Google for international travel.

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Main tourist destinations of interest for the United States market

Accommodation searches on Google for international travel over the last 2 months

Rank	Destination	Value
1	Messico	100
2	Italia	35
3	Regno Unito	35
4	Canada	32
5	Francia	29
6	Rep. Dominicana	26
7	Giappone	19
8	Spagna	18
9	India	11
10	Thailandia	11

For USA tourists, Italy (35) remains steady in 2nd place among the most searched destinations on Google for international travel.

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Recovery of international tourism by geographic area compared to 2019
International arrivals around the world: % of recovery January-September 2022 against January-September 2019

Totale nel mondo	63,0%
Europa	81,0%
Medio Oriente	77,0%
America	66,0%
Africa	63,0%
Asia e Pacifico	17,0%

© Australian Bureau of Statistics, GeoNames, GeoS
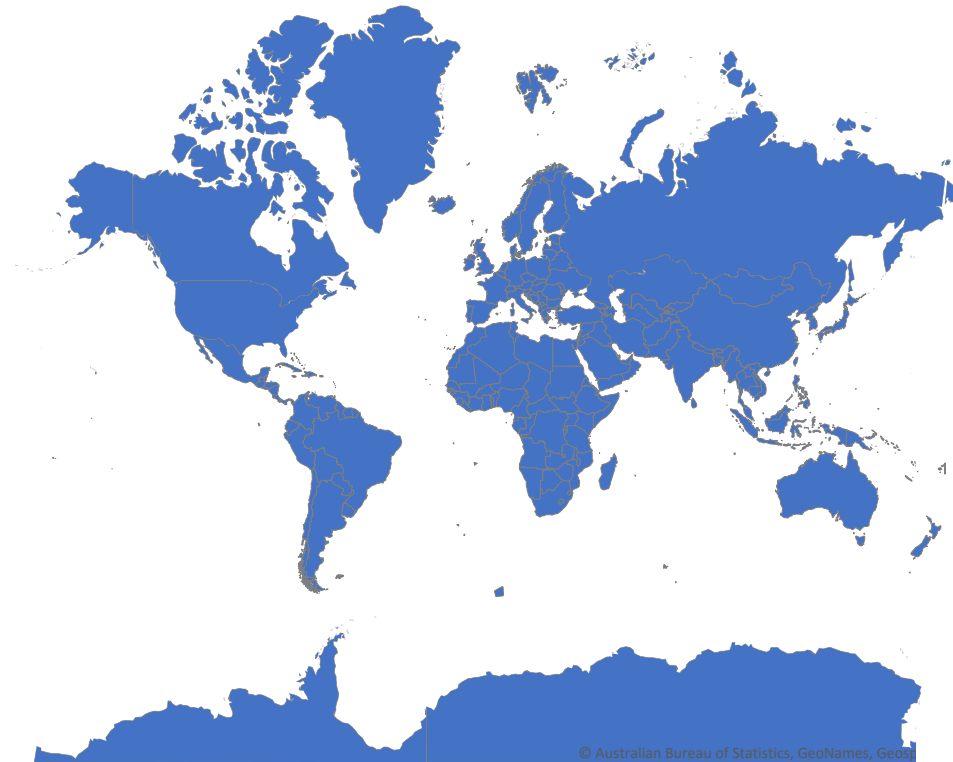
Between January and September 2022, the number of international travellers around the world reached 63% of the numbers in 2019. Europe is leading the recovery, achieving 81% of pre-pandemic levels, thanks to strong internal demand and visitors from the USA. In the 3rd quarter European international arrivals came close to 90% of the 2019 levels.

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Recovery of international tourism by geographic area compared to 2019

International arrivals around the world: % variation of January-September 2022 against January-September 2019

Totale nel mondo: -37.4%
Europa: -19.4%
Medio Oriente: -22.6%
America: -33.6%
Africa: -36.8%
Asia e Pacifico: -82.6%

© Australian Bureau of Statistics, GeoNames, Geospatial Data Edit, Microsoft, Navinfo, Open
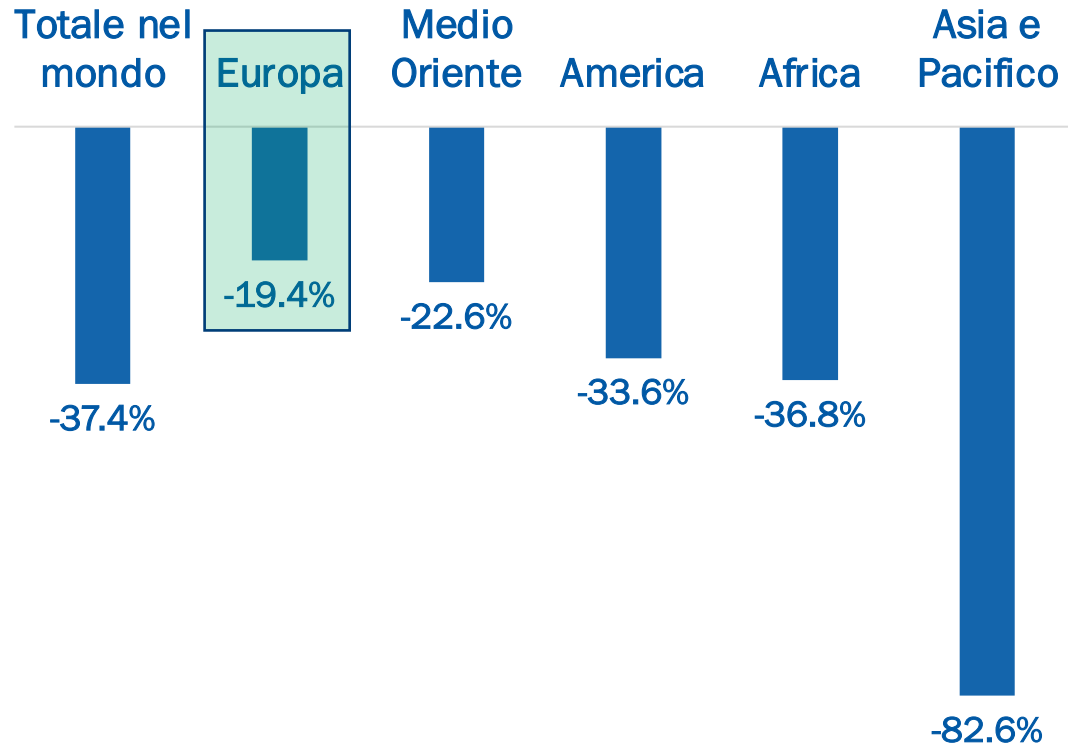
Between January and September 2022, the number of international travellers in Italy remained -37.4% down against 2019. There was a smaller drop in Europe (-19.4%) compared to other geographic areas and worldwide figures.

Source: ENIT Research Department using provisional UNWTO data for 2022

ENIT
1919
AGENZIA
NAZIONALE
DEL TURISMO

Monitoring of arrivals and international flight bookings to Italy
Past arrivals and bookings for the coming months in Italian airports – comparison between 2022 and 2021 on 06/12/2022

Luglio: 1,076,209 / 533,655
Agosto: 840,821 / 501,522
Settembre: 1,097,749 / 571,479
Ottobre: 890,274 / 578,484
Novembre: 391,987 / 329.,27
Dicembre: 424.,85 / 347.,87

■ Arrivi luglio-ottobre 2022
Prenotazioni novembre-dicembre 2022

■ Arrivi luglio-dicembre 2021
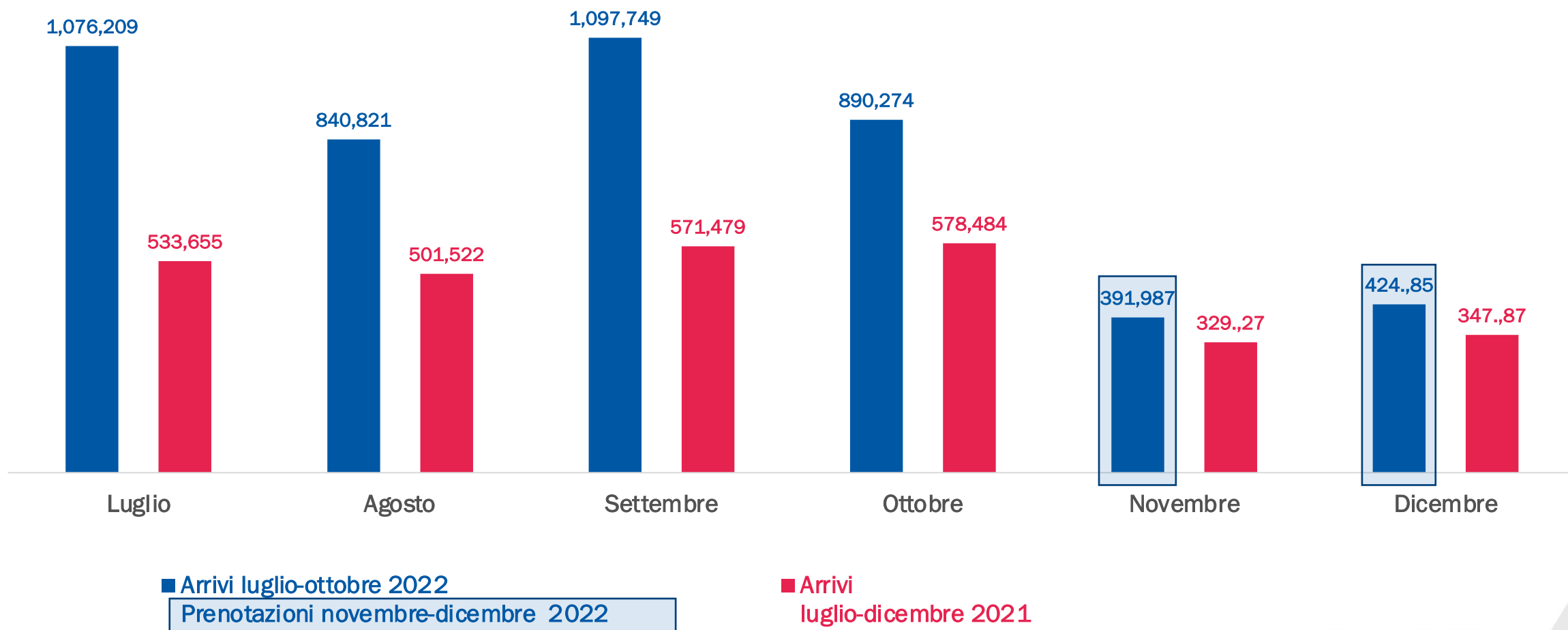
Monitoring of arrivals and international flight bookings to Italy
Past arrivals and bookings for the coming months in Italian airports – comparison between 2022 and 2019, on 06/12/2022
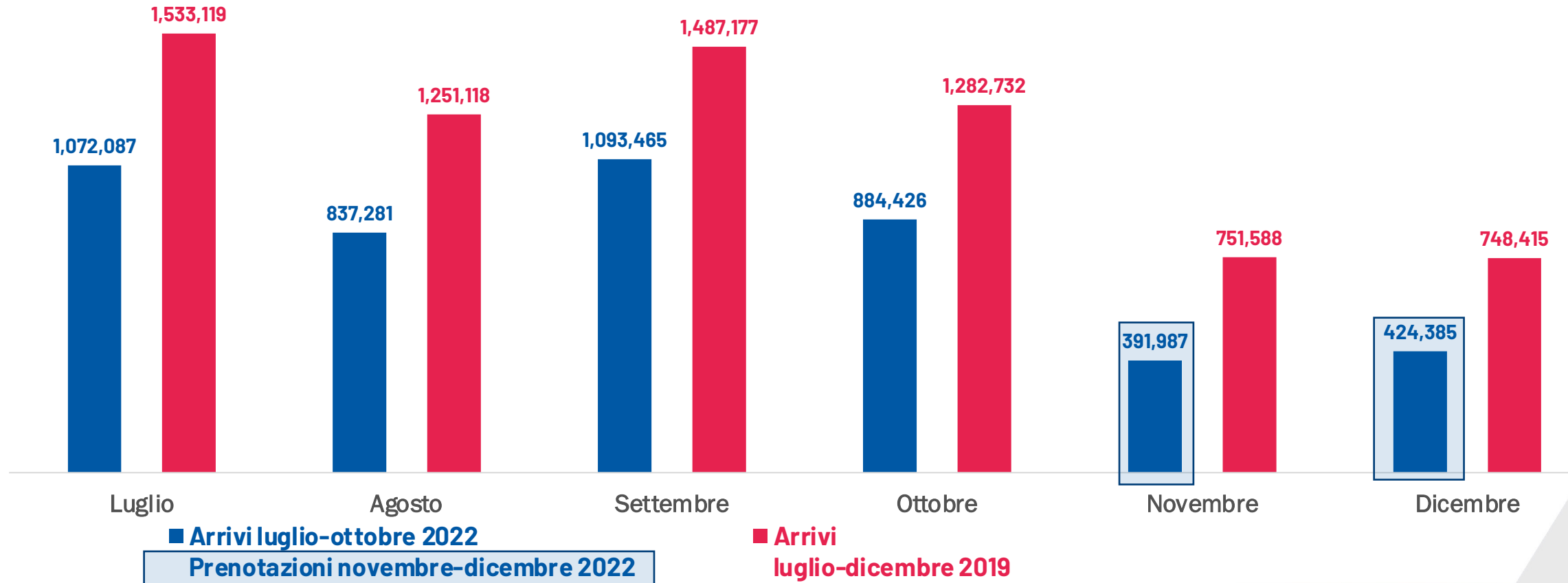
	Luglio	Agosto	Settembre	Ottobre	Novembre	Dicembre
Arrivi 2022	1,072,087	837,281	1,093,465	884,426	391,987	424,385
Arrivi 2019	1,533,119	1,251,118	1,487,177	1,282,732	751,588	748,415

■ **Arrivi luglio-ottobre 2022**
Prenotazioni novembre-dicembre 2022

■ **Arrivi luglio-dicembre 2019**

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Monitoring of international flight bookings to Italy - November

2022 Bookings by country of origin – % variation November 2022 against 2021, on 06/12/2022
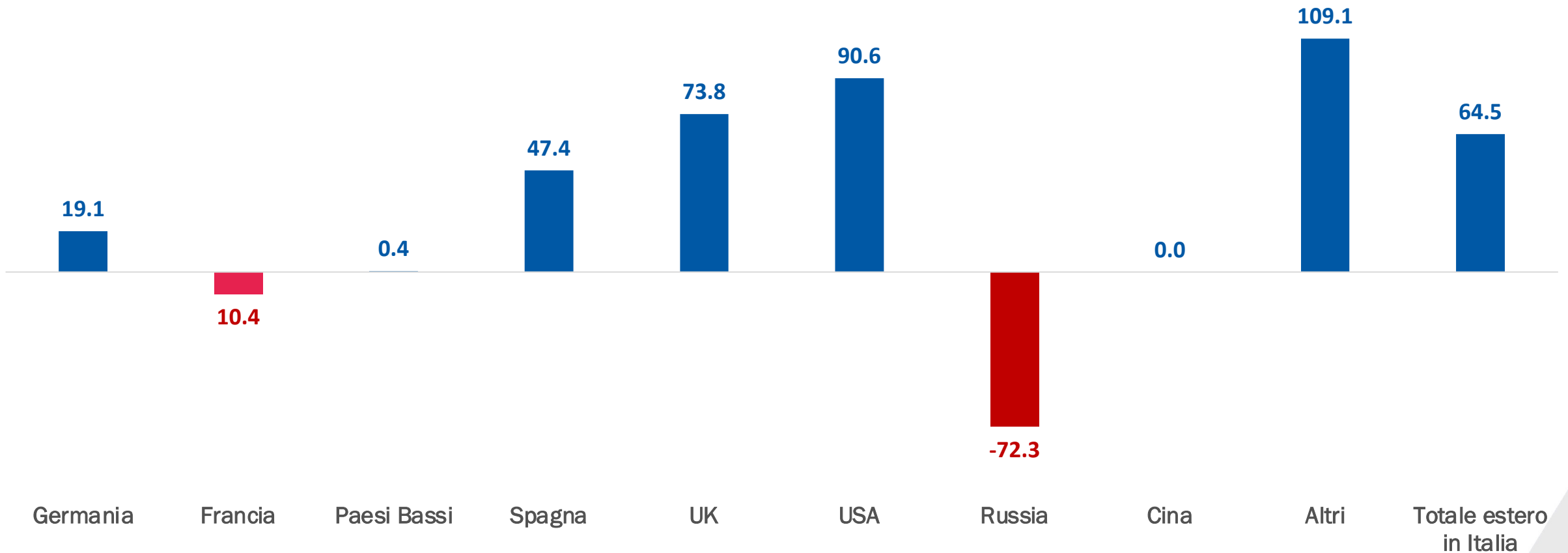
Germania	Francia	Paesi Bassi	Spagna	UK	USA	Russia	Cina	Altri	Totale estero in Italia
19.1	10.4	0.4	47.4	73.8	90.6	-72.3	0.0	109.1	64.5

Source: ENIT Research Department using Forward Data – updated to 27/11/2022

Monitoring of international flight bookings to Italy – December

2022 Bookings by country of origin – % variation December 2022 against 2021, on 06/12/2022
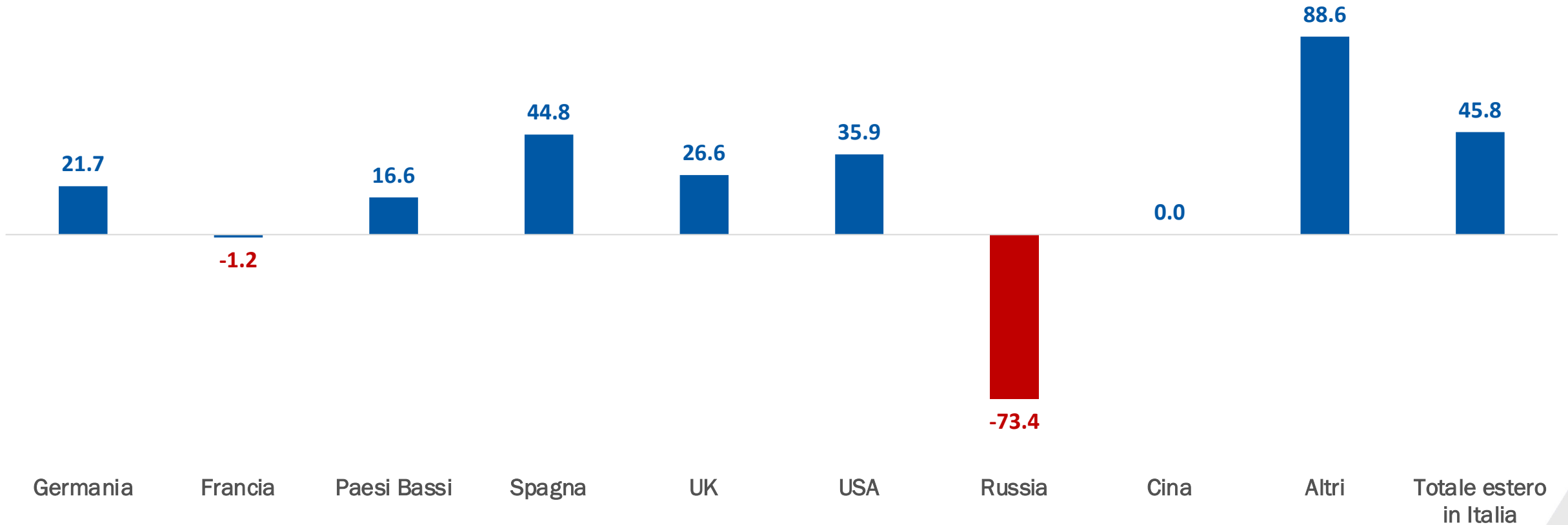
Germania	Francia	Paesi Bassi	Spagna	UK	USA	Russia	Cina	Altri	Totale estero in Italia
21.7	-1.2	16.6	44.8	26.6	35.9	-73.4	0.0	88.6	45.8

Source: ENIT Research Department using Forward Data – updated to 27/11/2022

Monitoring of international flight bookings – Italy and competitors
Bookings November and December 2022, on 06/12/2022
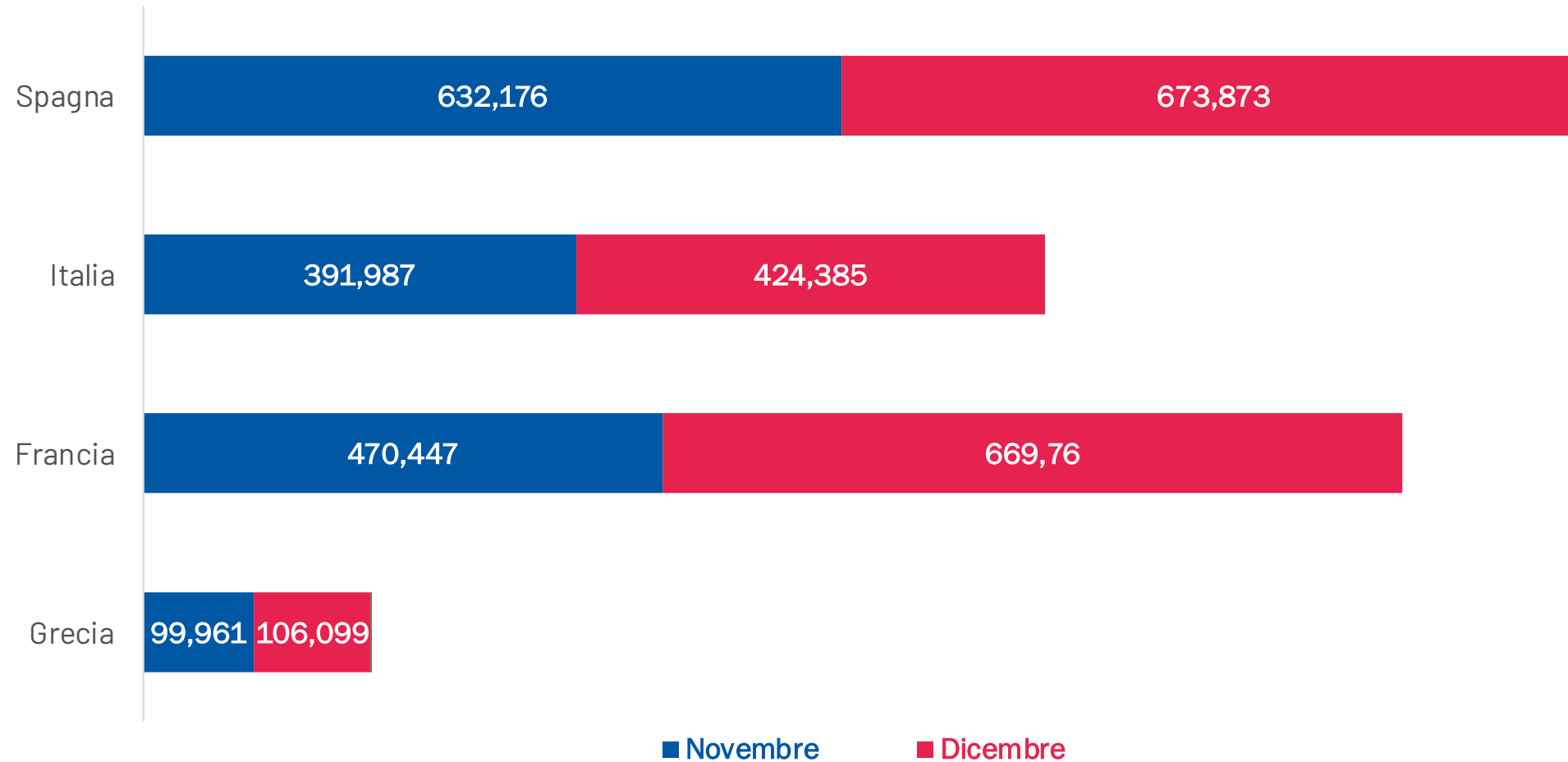
Country	Novembre	Dicembre
Spagna	632,176	673,873
Italia	391,987	424,385
Francia	470,447	669,76
Grecia	99,961	106,099

■ Novembre ■ Dicembre

Source: ENIT Research Department using Forward Data – updated to 27/11/2022

Monitoring of international flight bookings – Italy and competitors
Bookings November and December 2022 – % variation against 2021, on 06/12/2022
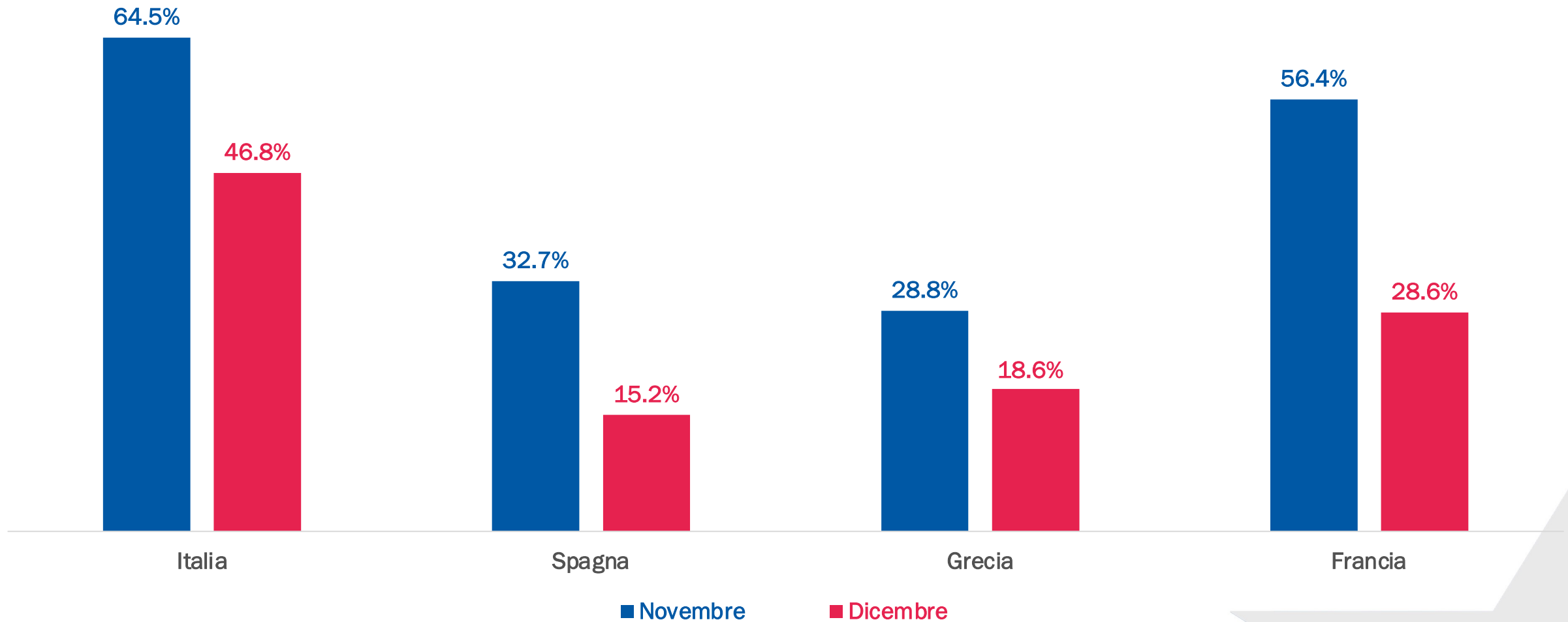
Italia — Novembre: 64.5%, Dicembre: 46.8%
Spagna — Novembre: 32.7%, Dicembre: 15.2%
Grecia — Novembre: 28.8%, Dicembre: 18.6%
Francia — Novembre: 56.4%, Dicembre: 28.6%

■ Novembre ■ Dicembre

Source: ENIT Research Department using Forward Data – updated to 27/11/2022

Monitoring of international flight bookings – Italy and competitors

Bookings November and December 2022 – % variation against 2019, on 06/12/2022
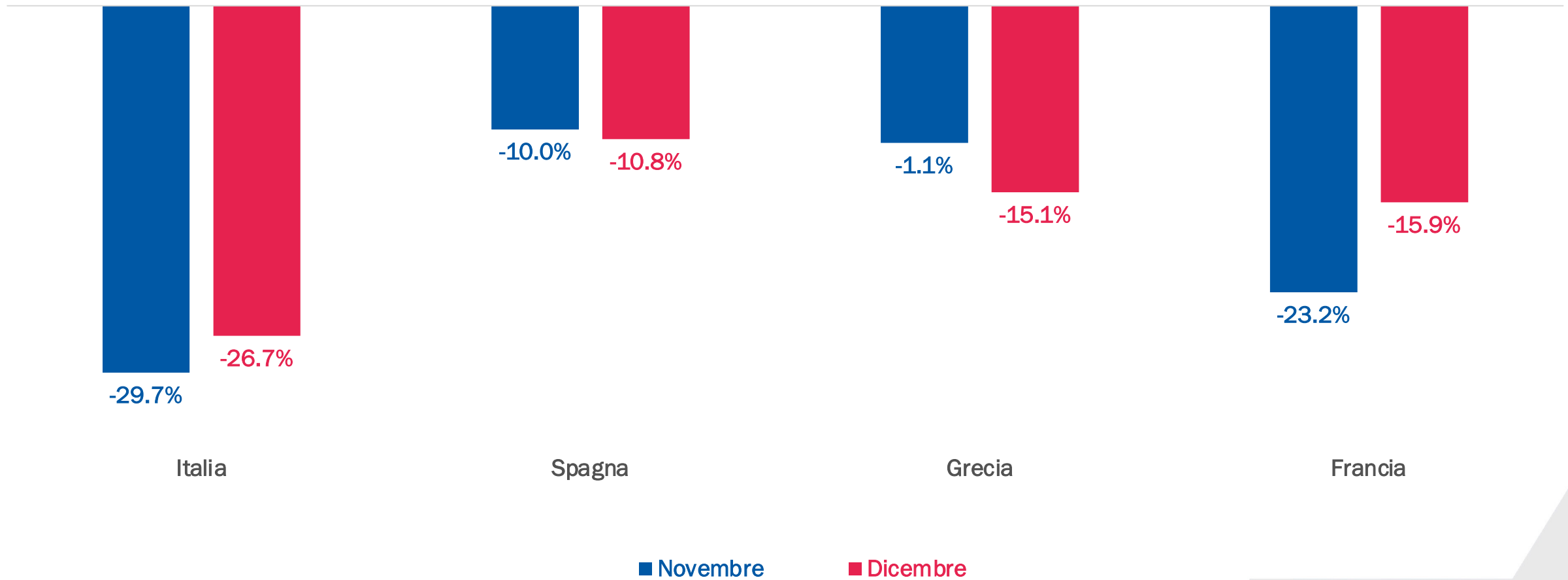
Italia
- Novembre: -29.7%
- Dicembre: -26.7%

Spagna
- Novembre: -10.0%
- Dicembre: -10.8%

Grecia
- Novembre: -1.1%
- Dicembre: -15.1%

Francia
- Novembre: -23.2%
- Dicembre: -15.9%

■ Novembre ■ Dicembre

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Accommodation bookings through Online Travel Agencies November 2022-2021

Products offered by major OTAs – occupancy rates by product compared with 2021

	Totale Italia	Montano	Città d'arte, culturale	Balneare	Lacuale	Termale	Altro
Novembre 2022	41.9%	46.2%	43.8%	39.3%	45.2%	42.8%	35.9%
Novembre 2021	21.2%	21.6%	21.8%	21.1%	20.9%	26.2%	16.2%

■ Novembre 2022 ■ Novembre 2021

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Accommodation bookings through Online Travel Agencies December 2022-2021
Products offered by major OTAs – occupancy rates by product compared with 2021
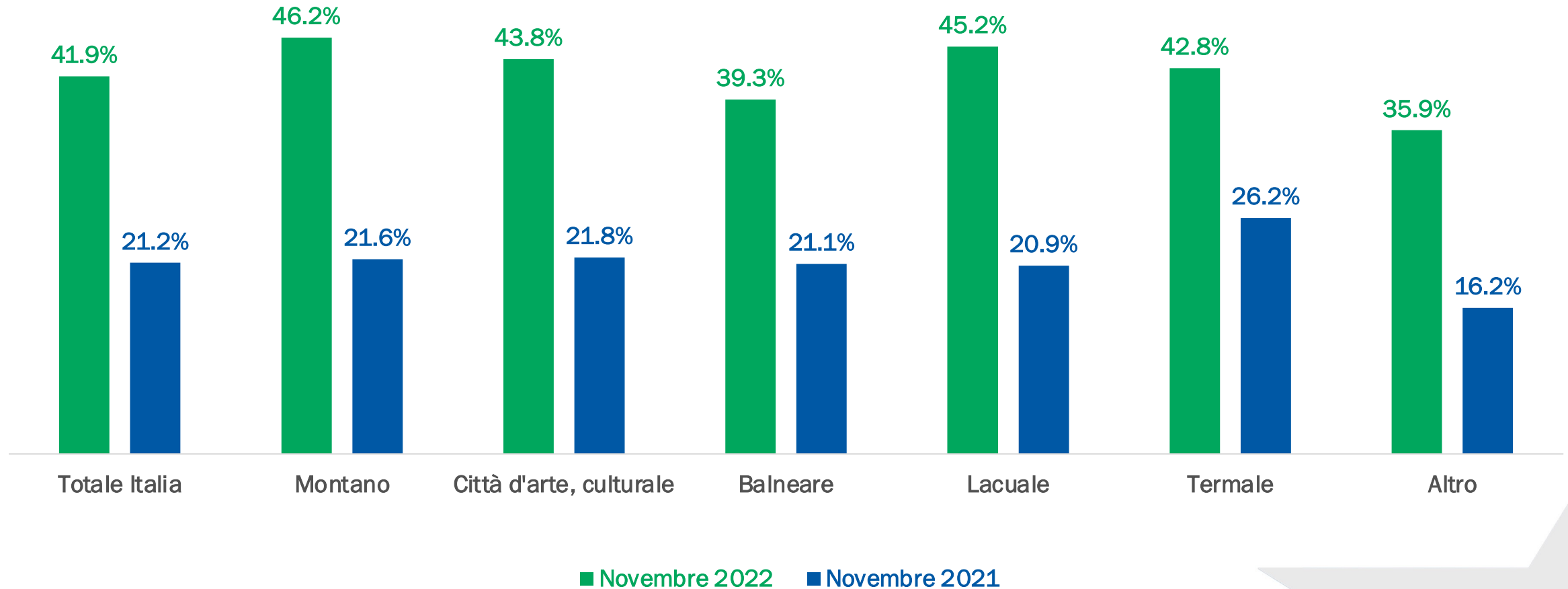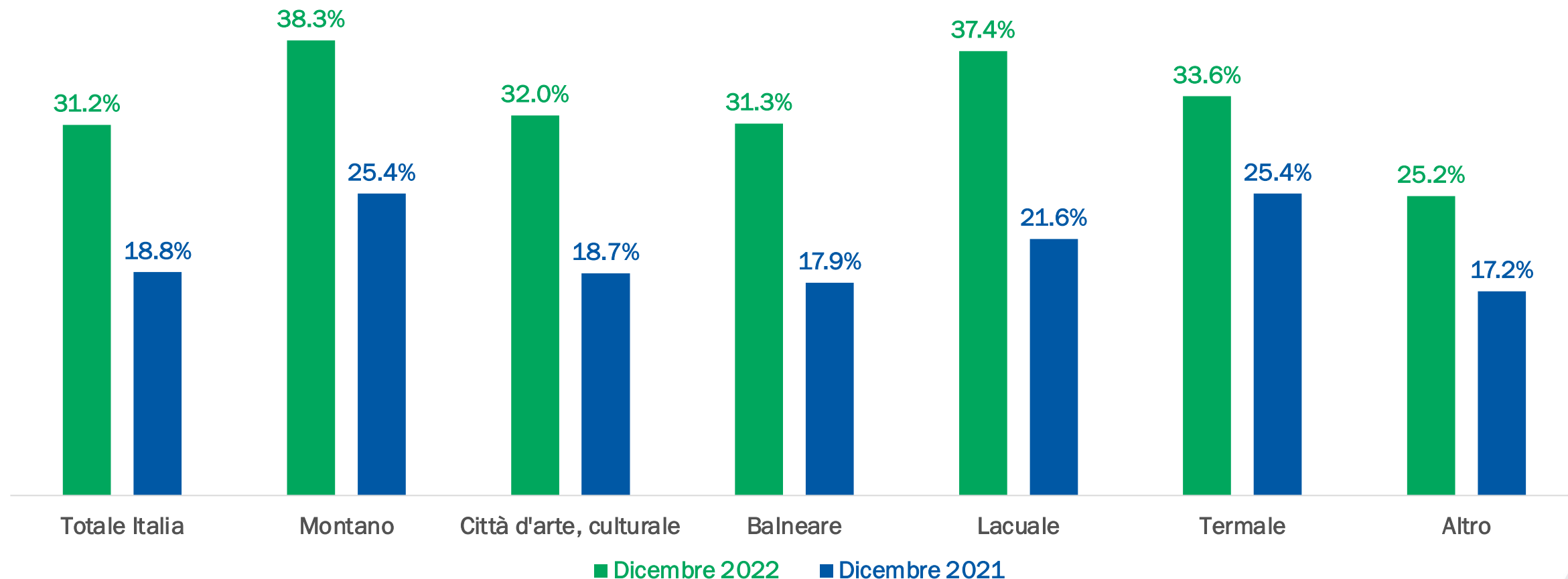
Source: ENIT Research Department using The Data Appeal Company data, on 06/12/2022

FOCUS:
IMMACULATE CONCEPTION LONG WEEKEND

Accommodation bookings through Online Travel Agencies 5-12 December
Products offered by major OTAs – accommodation facility occupancy rates, comparison 2022-2021

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

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

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

The mountain category is the most popular, on the same days going well above the national average with 62.4%, 68.9%, and 60.0% of available accommodation booked.
Good performance is also observed for lakes (8 December 47.4%; 9 December 52.4%: 10 December 49.8%), cultural (48.3%; 56.1%; 47.8%), and thermal spa products (51.6%; 53.1%; 46.4%).

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Monitoring of international flight bookings to Italy 5-11 December

2022 Bookings by country of origin – comparison between 2022 and 2021, on 06/12/2022
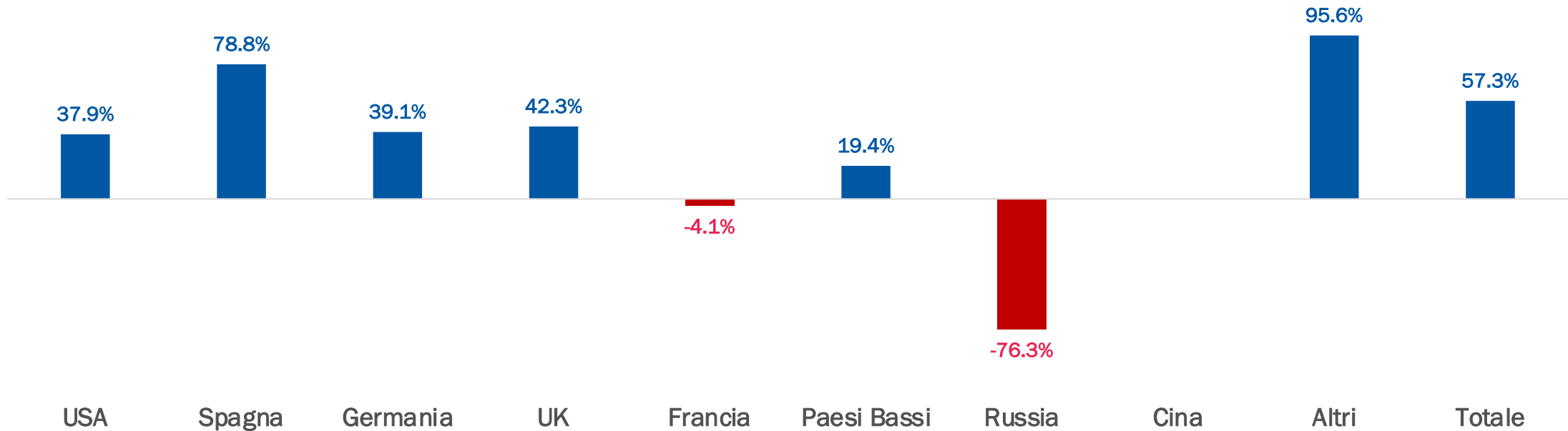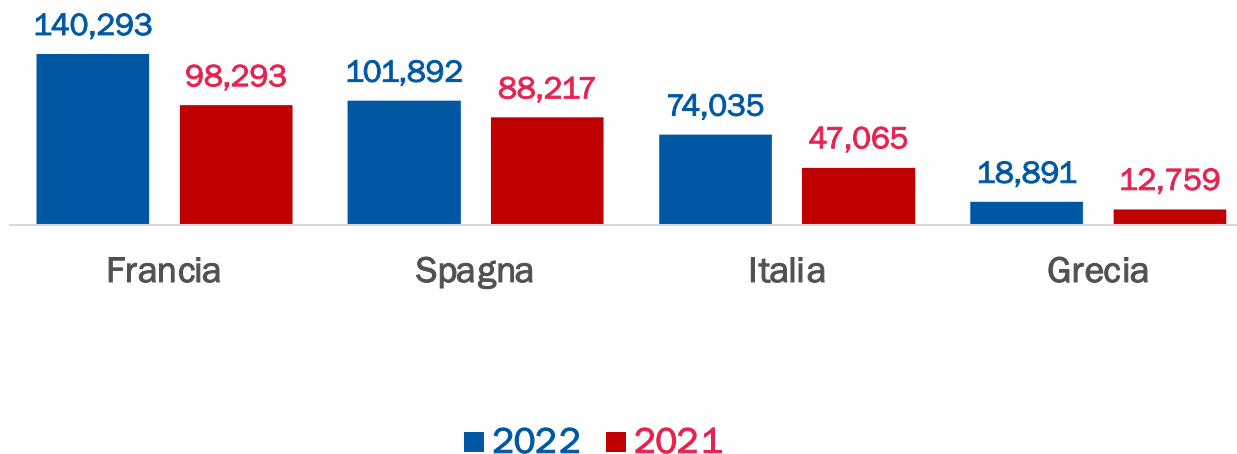

Overall, in the week from 5 to 11 December international flight bookings to Italy, totalling 74,035, increased by +57.3% against the same period in 2021.

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

Monitoring of international flight bookings to Italy 5-11 December

2022 Bookings by country of origin – % variation of 2022 against 2021, on 06/12/2022

	USA	Spagna	Germania	UK	Francia	Paesi Bassi	Russia	Cina	Altri	Totale
%	37.9%	78.8%	39.1%	42.3%	-4.1%	19.4%	-76.3%		95.6%	57.3%

Monitoring of international flight bookings to Italy 5-11 December

2022 Bookings for Italy and competitors – comparison and % variation between 2022 and 2021 on 06/12/2022

International flight bookings to Italy and competitors
5-11 December 2022 compared to 2021

International flight bookings to Italy and competitors
5-11 December 2022 % variation 22-21

	Francia	Spagna	Italia	Grecia
2022	140,293	101,892	74,035	18,891
2021	98,293	88,217	47,065	12,759

Francia	Spagna	Italia	Grecia
42.7%	15.5%	57.3%	48.1%

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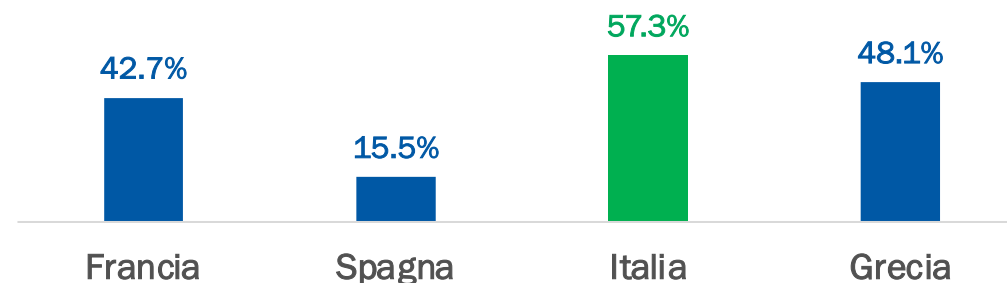
For this long weekend, bookings to Italy fall short of those for the competitors Spain and France. Nevertheless the rate of growth of Italy, +57.3% in the week 5-11 December 2022 against 2021, is significantly better compared to Spain (+15.5%), and at least 10 percentage points more than France (+42.7%)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

ENIT
1919
AGENZIA
NAZIONALE
DEL TURISMO

Monitoring of international flight bookings to Italy 5-11 December
2022 Bookings for Italy by destination – comparison and % variation between 2022 and 2021 on 06/12/2022

Destination	Rome	Milan	Venice	Bologna	Florence	Naples	Turin
2022	32,616	19,767	7,303	3,665	3,635	2,259	**2,172**
2021	17,239	13,848	5,867	2,388	2,944	1,965	**939**
% Var.	89.2	42.7	24.5	53.5	23.5	15.0	**131.3**

Destination	Catania	Verona	Pisa	Palermo	Genoa	Bari	Trieste	Ancona	Others
2022	598	**498**	288	**283**	283	239	201	147	81
2021	524	**206**	194	**128**	187	326	116	103	91
% Var.	14.1	**141.7**	48.5	**121.1**	51.3	-26.7	73.3	42.7	-11.0

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

Monitoring of international flight bookings to Italy 5-11 December

2022 Bookings by country of origin – comparison between 2022 and 2021, on 06/12/2022
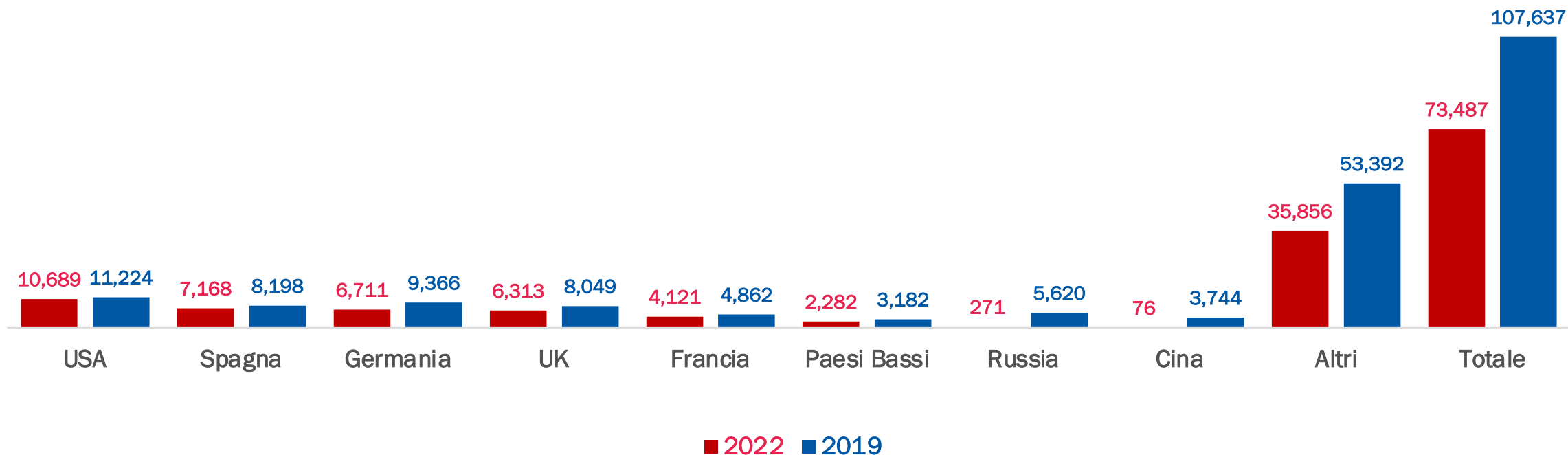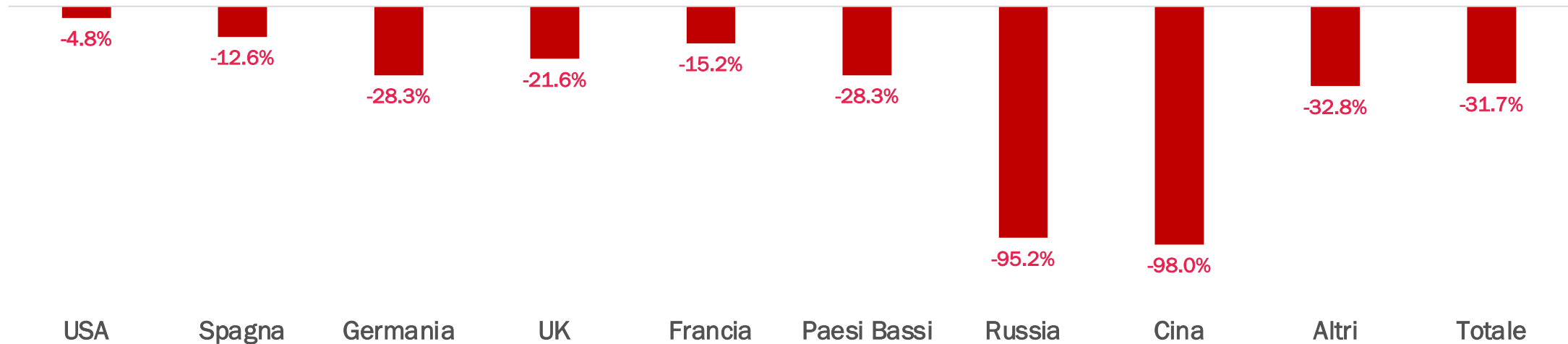

Compared to 2019, overall flight bookings to Italy for the week including the long weekend of the Immaculate Conception remain down by -31.7%. However, there is a much smaller gap for bookings from the USA, with -4.8% against the same week of 5-11 December 2019, much less than other markets of origin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

Monitoring of international flight bookings to Italy 5-11 December
2022 Bookings by country of origin – % variation of 2022 against 2019, on 06/12/2022

USA	Spagna	Germania	UK	Francia	Paesi Bassi	Russia	Cina	Altri	Totale
-4.8%	-12.6%	-28.3%	-21.6%	-15.2%	-28.3%	-95.2%	-98.0%	-32.8%	-31.7%

Research and Study Department – ENIT Marketing and Promotion Management

Market Research and Statistics - ENIT Marketing and Promotion Management

Visit the ENIT Research Department:
https://www.enit.it/it/ufficio-studi
Where you will find …

Bulletins – Trends in Italian tourism
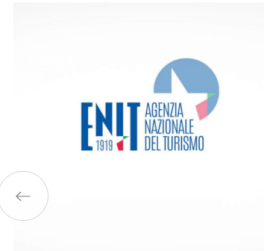
Dal 1 al 30 Settembre 2022
Bollettino ENIT - Settembre

Dal 1 al 31 Agosto 2022
Bollettino ENIT - Agosto
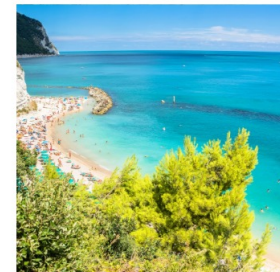
Dal 22 al 31 Luglio 2022
Bollettino ENIT – Luglio Week 4

Dal 15 al 21 Luglio 2022
Bollettino ENIT - Luglio Week 3

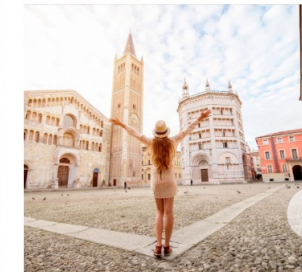**Investigations – Studies of populations, accommodations, products, and targets**

18 Novembre 2022
Monitoraggio sul mercato intermediato dei viaggi con focus su proposte turismo enogastronomico

1 Giugno 2022
La domanda turistica degli italiani – Previsional estate 2022 - Indagine sul turismo domestico

1 Giugno 2022
Osservatorio Turismo Open Air – Wave III

1 Maggio 2022
La domanda turistica degli italiani – Rilevazione post Pasqua 2022

Various in-depth analyses
Infographics
European projects
… and much more ….

ENIT – Italian National Tourist Board
redazione.ontit@enit.it