

ENIT BULLETIN

In-depth analysis of tourism trends

October 2022

By the

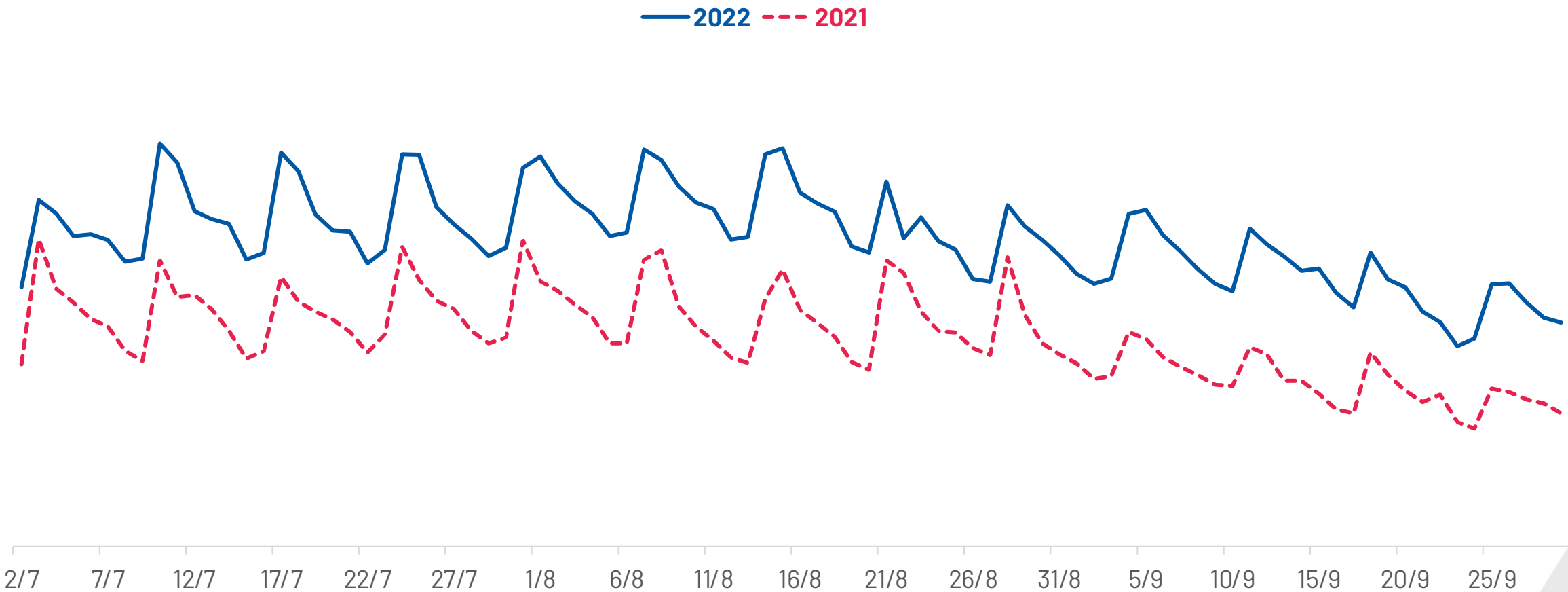
Research Department

ENIT - ITALIAN NATIONAL TOURIST BOARD



Interest among international tourists for visiting Italy

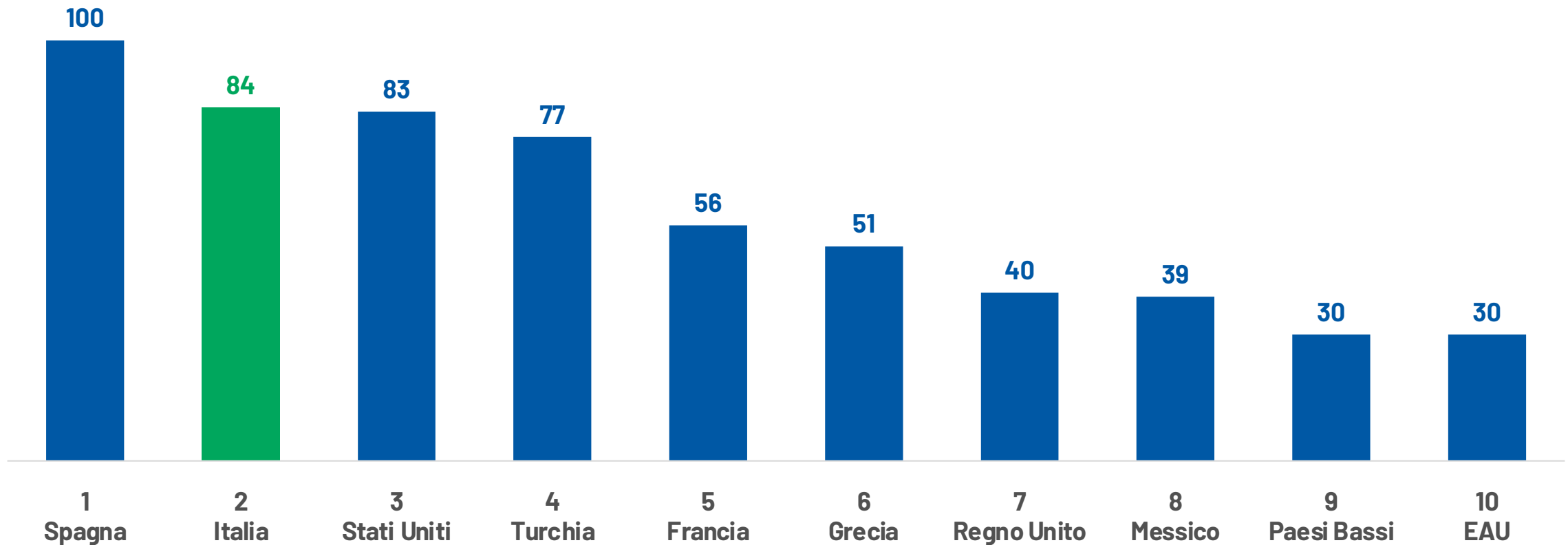
Accommodation searches on Google for trips to Italy over the last 3 months



Source: ENIT Research Department using Google Destination Insights (for the period from 01/07/2022 to 30/09/2022) – All the data is indexed

Ranking of Italy in terms of interest for international travel

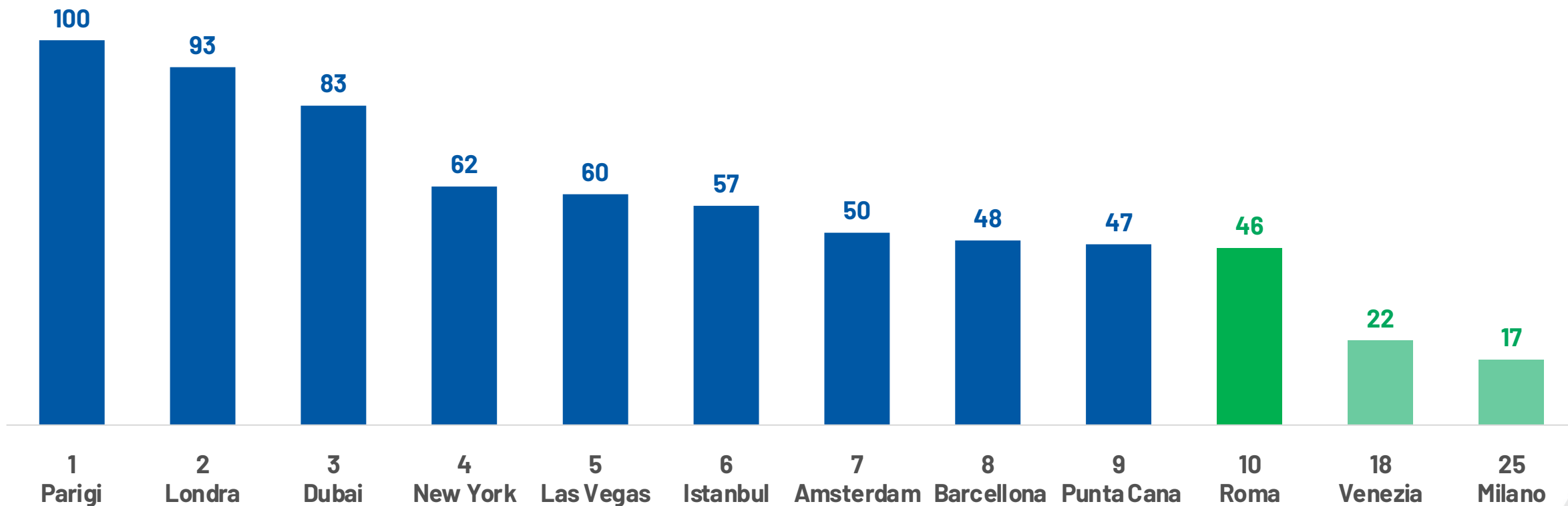
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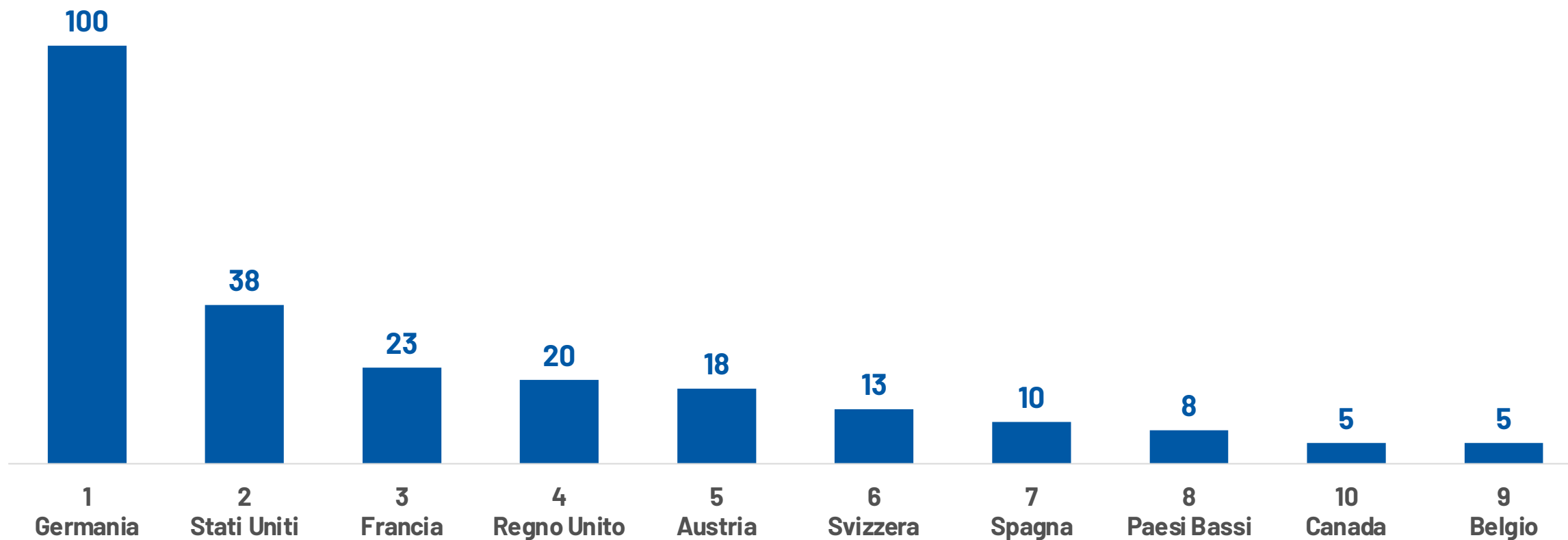
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The main countries interested in Italy

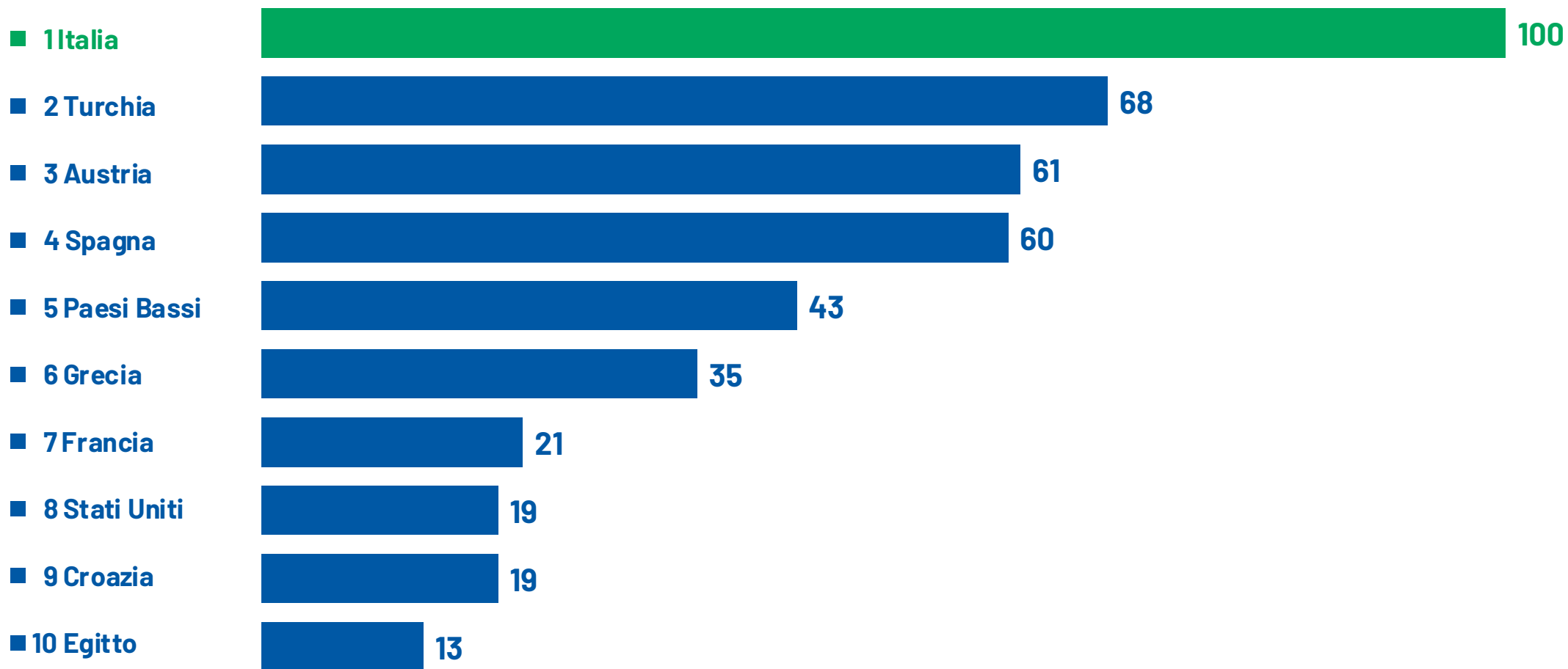
Accommodation searches on Google for trips to Italy over the last 3 months



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Main tourist destinations of interest for the German market

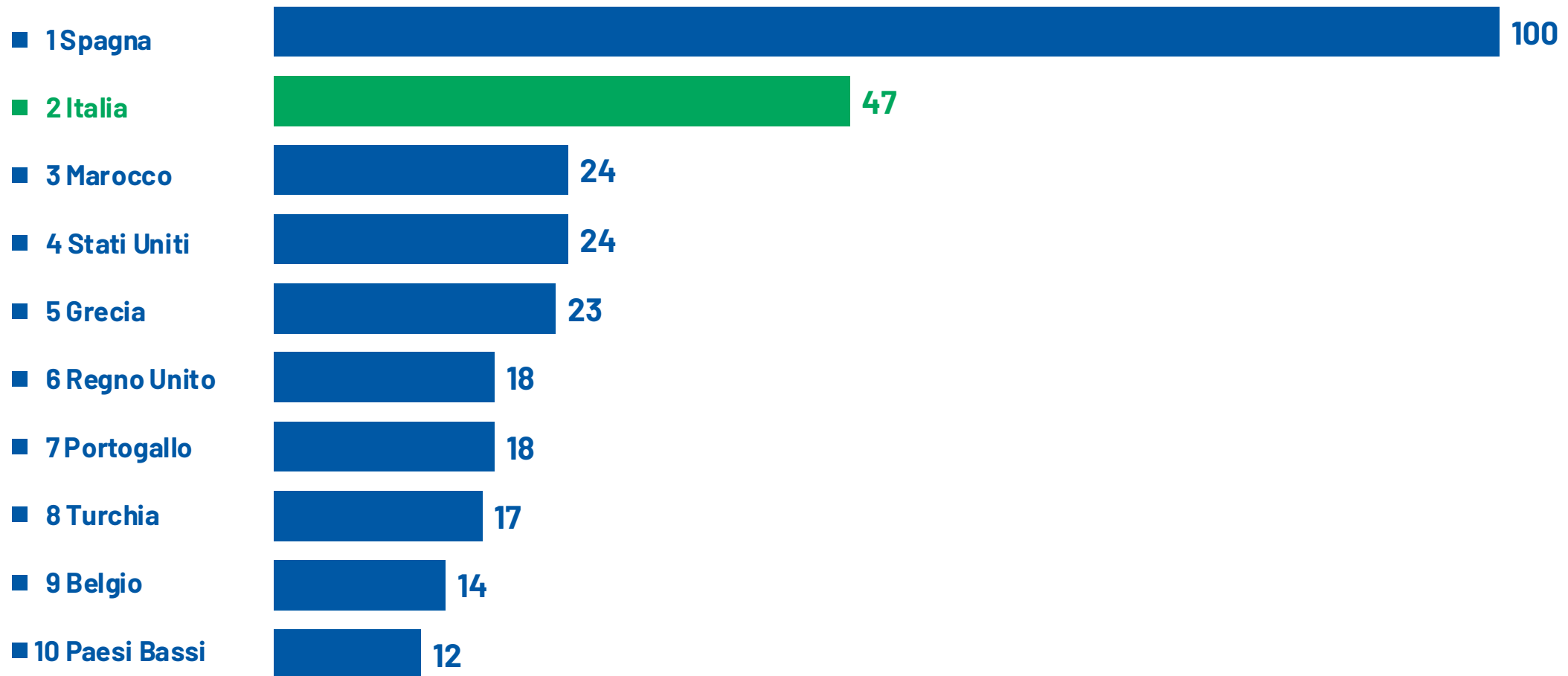
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Main tourist destinations of interest for the French market

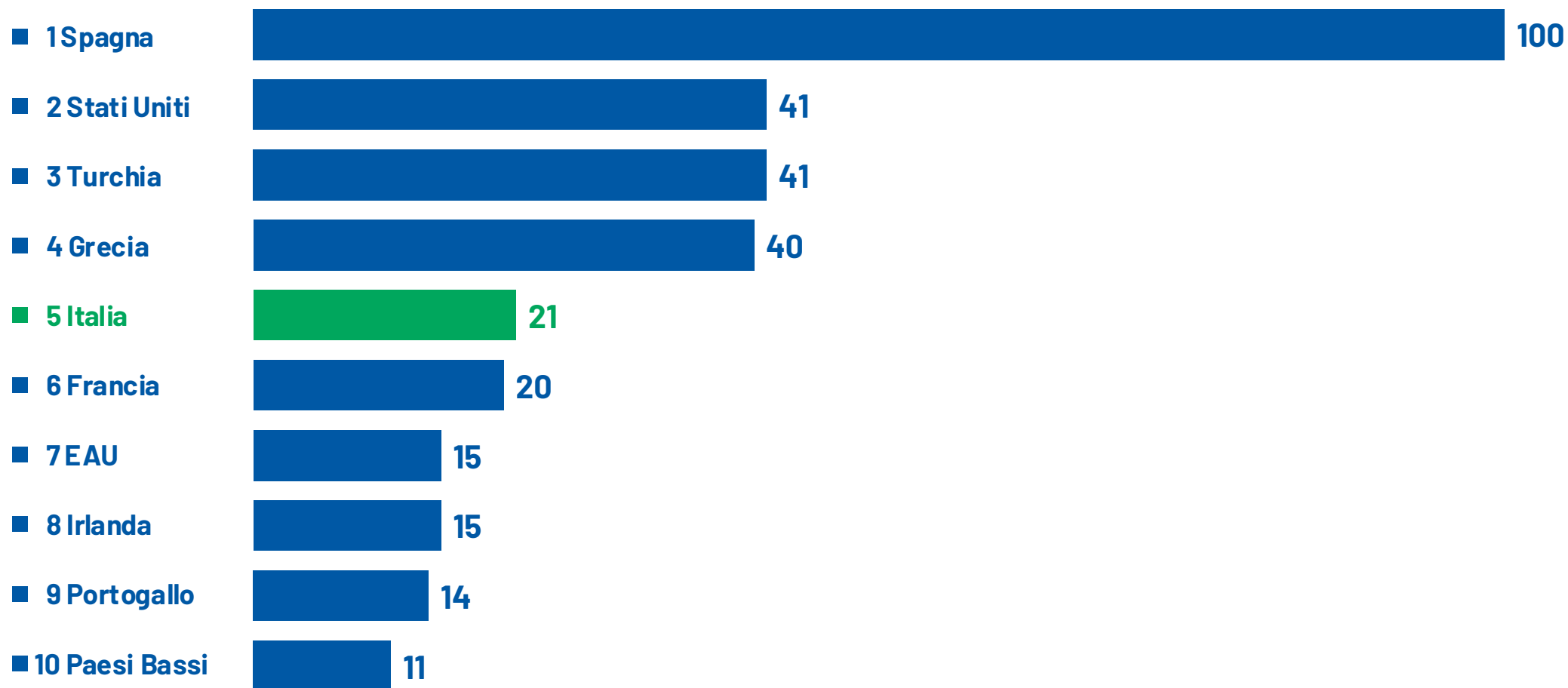
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Main tourist destinations of interest for the United Kingdom market

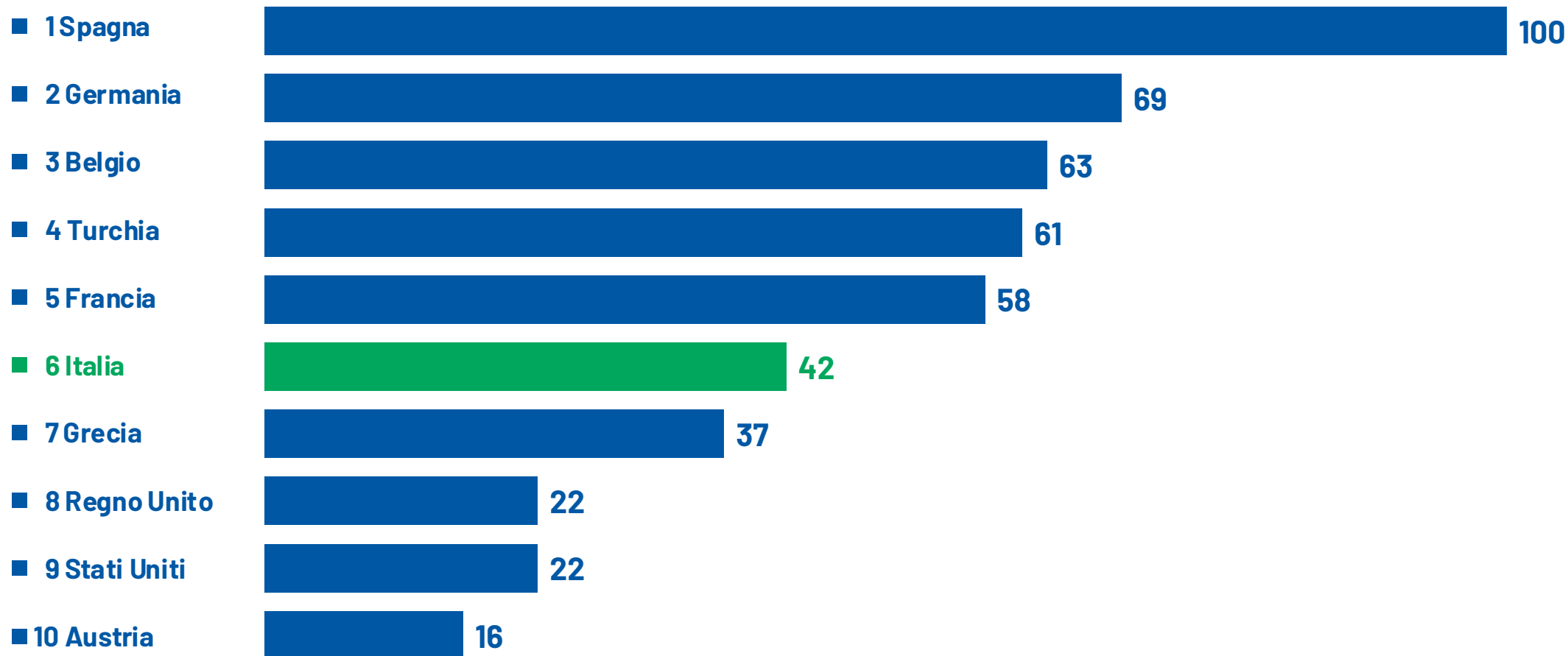
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Main tourist destinations of interest for the Dutch market

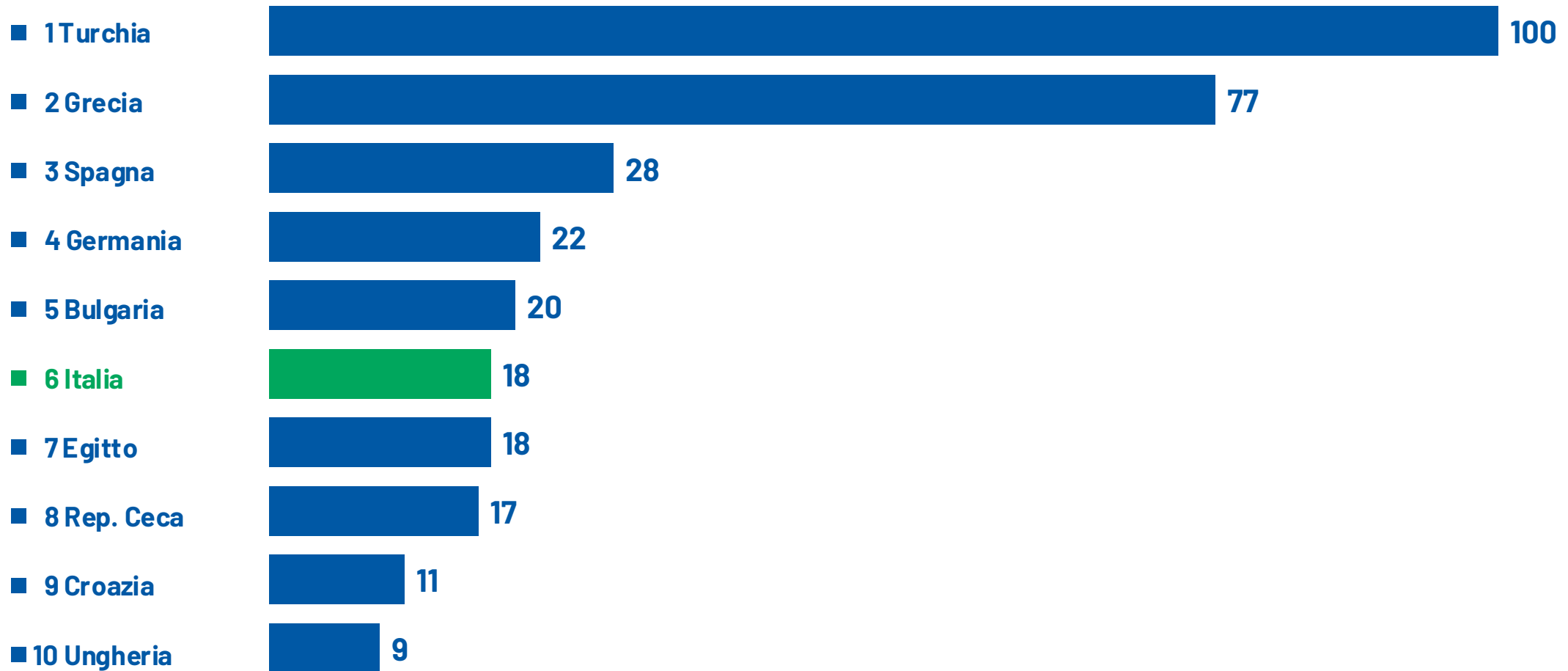
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Main tourist destinations of interest for the Polish market

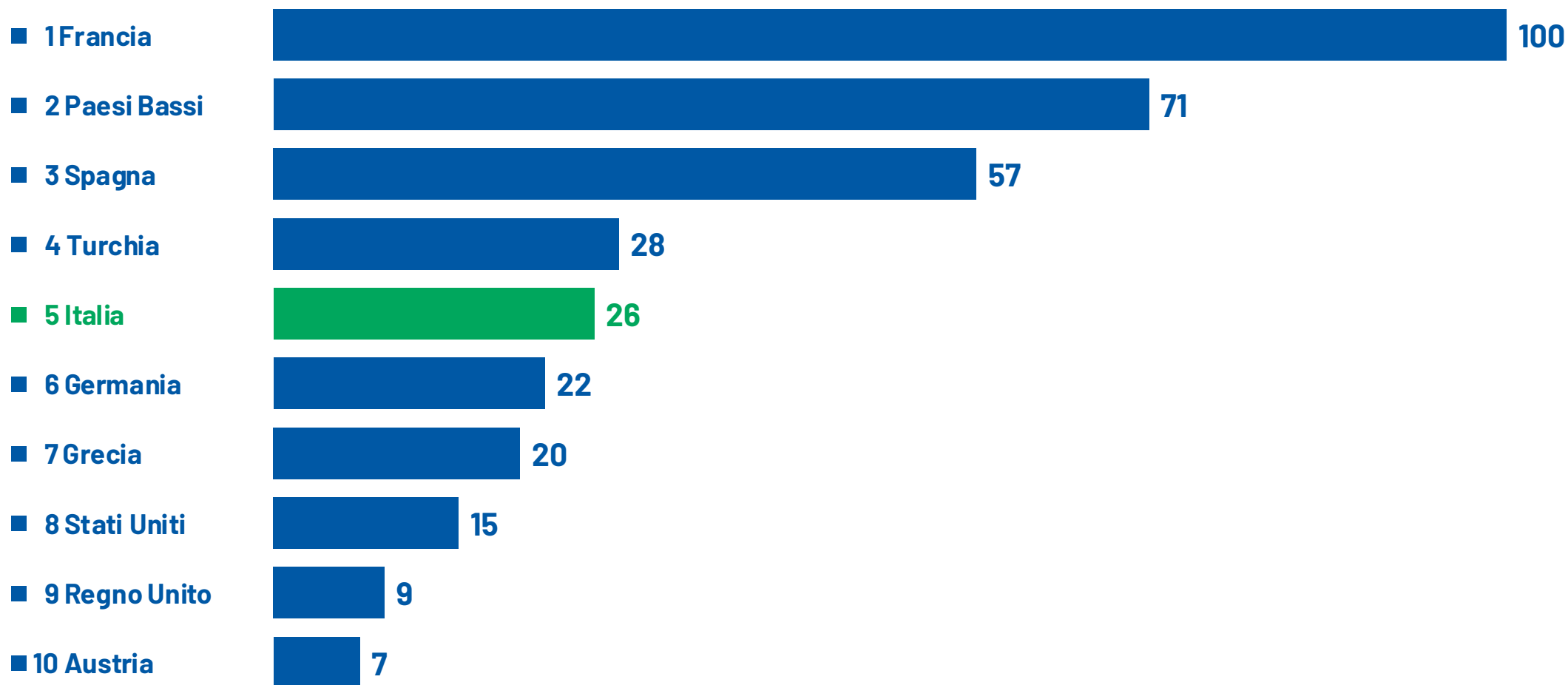
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Main tourist destinations of interest for the Belgian market

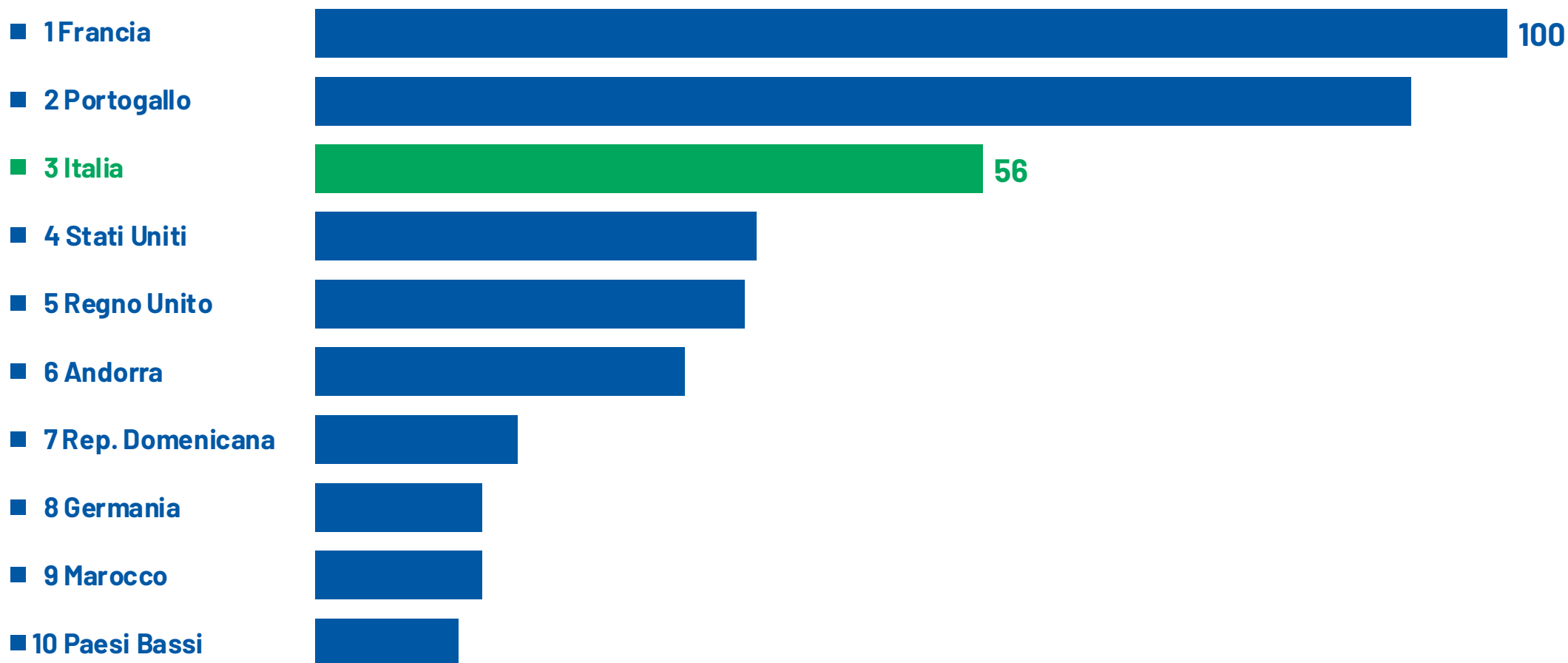
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Main tourist destinations of interest for the Spanish market

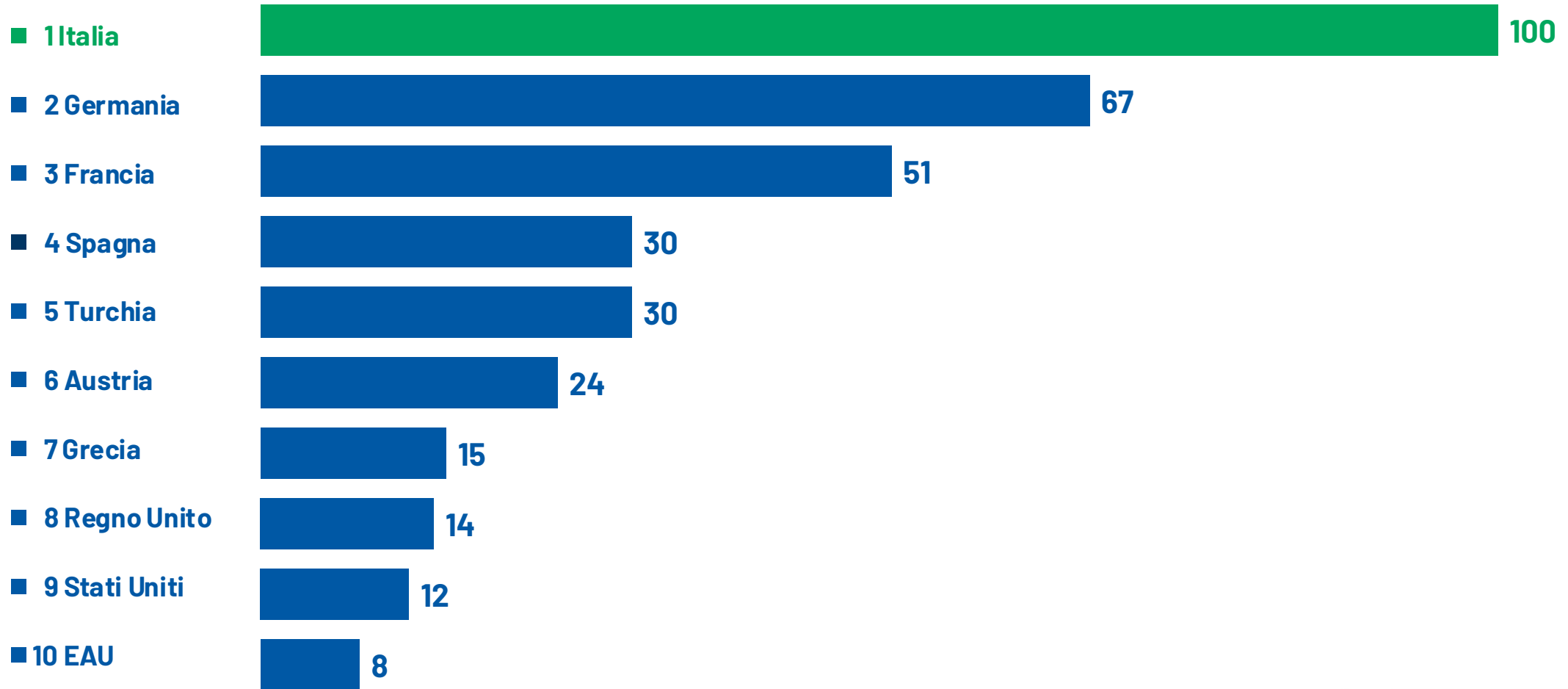
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Main tourist destinations of interest for the Swiss market

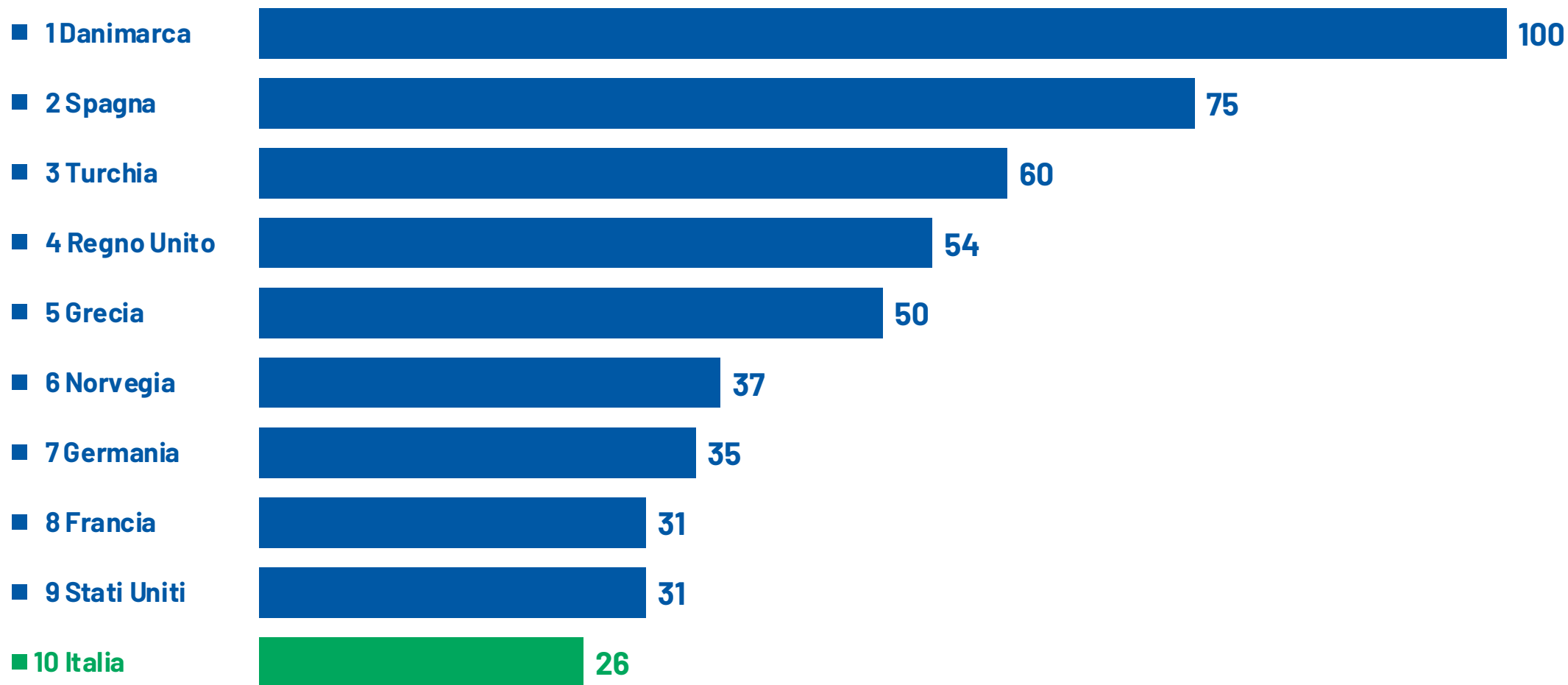
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Main tourist destinations of interest for the Swedish market

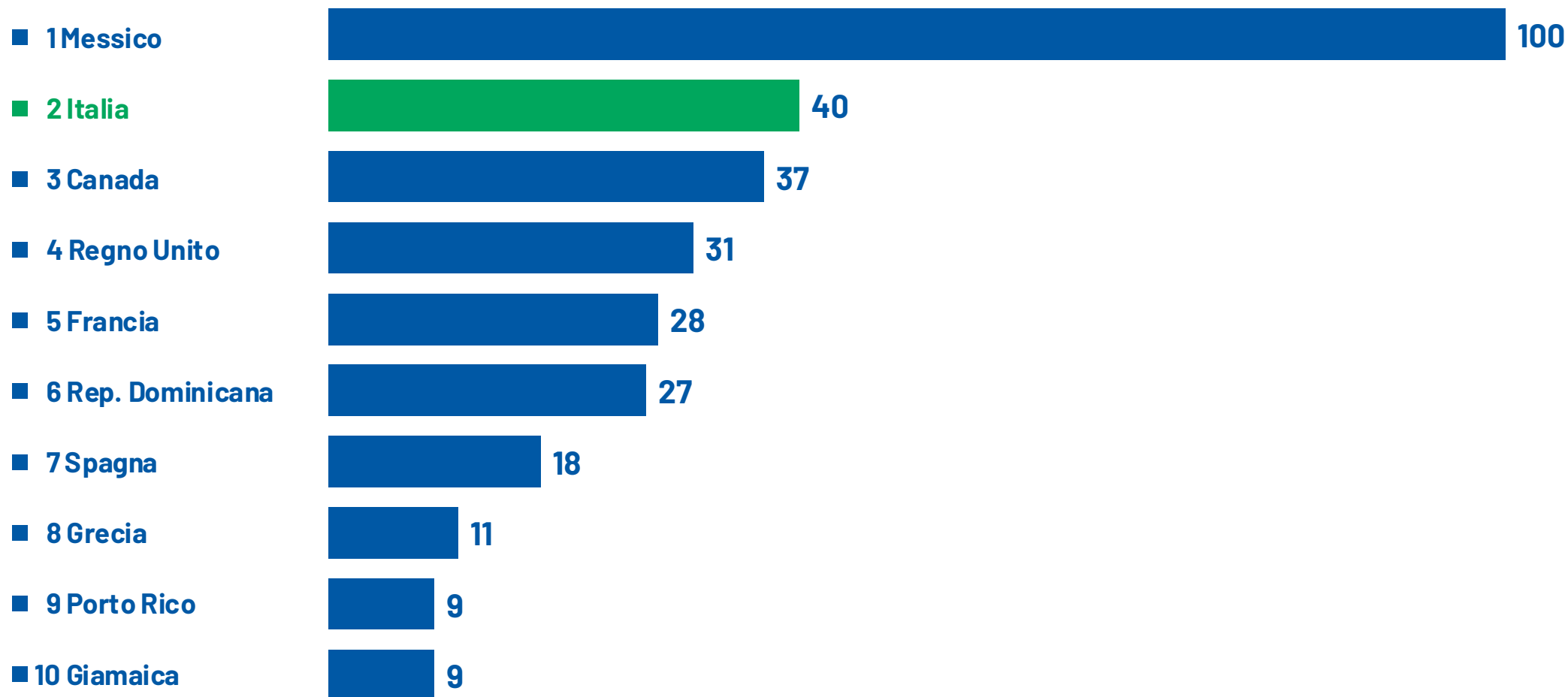
Accommodation searches on Google for international travel over the last 3 months



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Main tourist destinations of interest for the United States market

Accommodation searches on Google for international travel over the last 3 months



Source: ENIT Research Department using Google Destination Insights (for the period from 01/07/2022 to 30/09/2022) – All the data is indexed

Variation in interest of markets for visiting the main Italian cities

Accommodation searches on Google for trips to Italy over the last 3 months

% Var.	Germany	France	United Kingdom	Netherlands	Poland
+75%	Corvara	Ventimiglia, Courmayeur Sirmione, Aosta	Lido di Jesolo, Massa Lubrense, Siena, Genoa, Riva del Garda, Riccione	Portofino, Sirmione, Montecatini Terme, Lido di Jesolo, Riva del Garda, Riccione, Bibione	Sorrento, Verona, Pescara, Riccione Lignano Sabbiadoro, San Giovanni Rotondo Chianciano Terme
from 50% to 75%	Selva	Pisa Siena	Naples, Sirmione, Turin, Cefalù, Lucca		Alghero
from 25% to 50%	Genoa	Sanremo, Genoa, Turin Porto Cervo, Riccione, Lido di Jesolo, Abano Terme, Cattolica	Porto Cervo, Verona, Como, Pisa, Olbia, Catania, Siracusa, Bari	Alba Adriatica	Cefalù
from 10% to 25%	Venice, Rimini Florence, Bolzano Verona	Florence, Milan, Rimini, Bologna	Florence, Palermo, Lecce	Verona, Naples, Genoa	Florence, Taormina, Lido di Jesolo
from -10% to 10%	Rome, Bibione, Milan	Rome, Naples, Palermo, Olbia, Taormina, Sorrento	Rome, Venice, Sorrento, Milan, Taormina, Amalfi, Bologna	Rome, Milan, Venice, Florence, Bologna, Pisa Como, Taormina, Sorrento	Rome, Venice, Milan, Rimini, Palermo

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Variation in interest of markets for visiting the main Italian cities

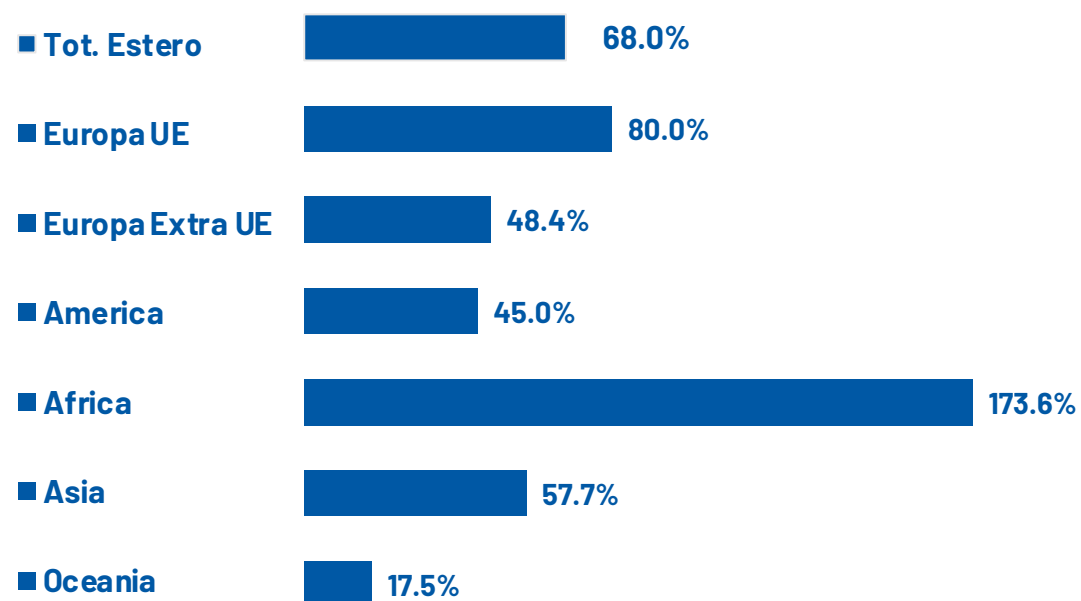
Accommodation searches on Google for trips to Italy over the last 3 months

% Var.	Belgium	Switzerland	Sweden	Spain	United States
+75%	Portofino, Abano Terme, Selva		Genoa, Siracusa, Porto Recanati	Verona, Rimini, Riccione Mantova, La Spezia, Salerno, Padua, Sassari, Ferrara, Lucca	Rimini, Verona, Catania, Lido di Jesolo, Riccione, Siracusa, Turin, Lucca
from 50% to 75%			Giardini Naxos	Como	Genoa
from 25% to 50%				Genoa, Siracusa	Siena, Matera
from 10% to 25%	Alghero, Turin	Merano, Verona, Abano Terme, Taormina, Sanremo	Rimini	Venice, Florence, Naples, Sorrento, Palermo	Rome, Florence, Venice, Milan, Taormina, Bologna, Palermo
from -10% to 10%	Rome, Milan, Venice, Florence, Rimini Bologna	Rome, Rimini, Venice, Florence, Como, Genoa, Alassio	Rome, Milan, Venice, Florence, Alghero, Pisa, Viareggio Santa Margherita Ligure, Riva del Garda	Rome, Milan, Bologna, Pisa, Catania, Porto Cervo, Amalfi	Naples, Como, Porto Cervo, Positano, Amalfi, Polignano a Mare, Portofino

Source: ENIT Research Department using Google Destination Insights (for the period from 01/07/2022 to 30/09/2022) – All the data is indexed

Recovery of Italy in international markets compared to 2019

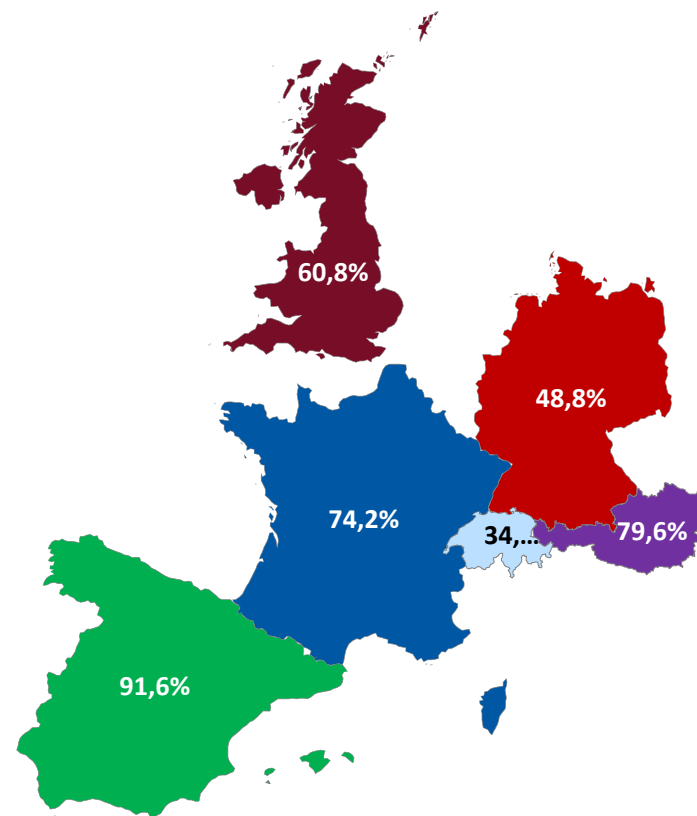
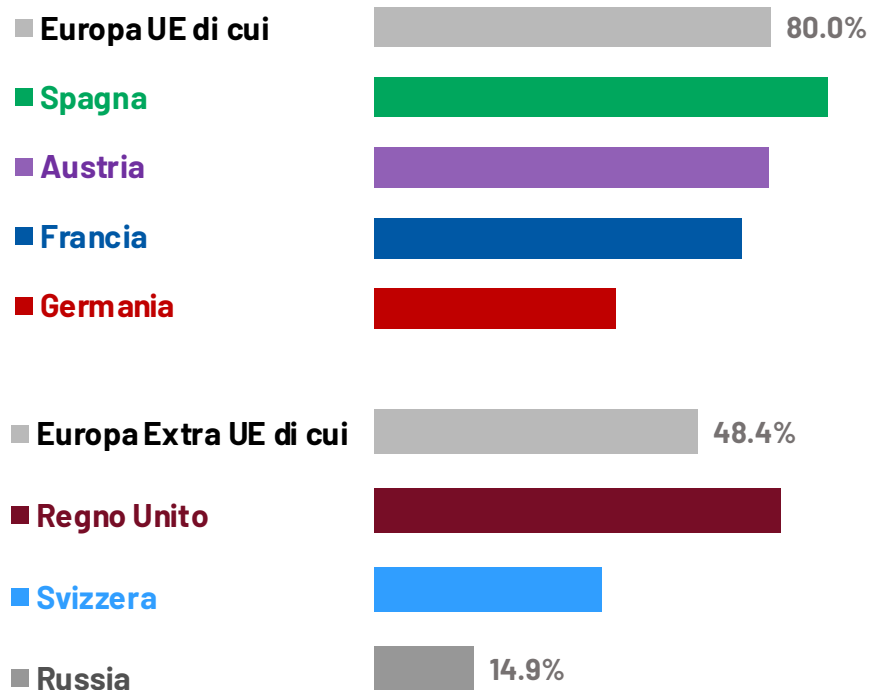
International travellers to Italy: % recovery January-June 2022 against volume January-June 2019



Source: ENIT Research Department using provisional Bank of Italy data for 2022

Recovery of Italy in international markets compared to 2019

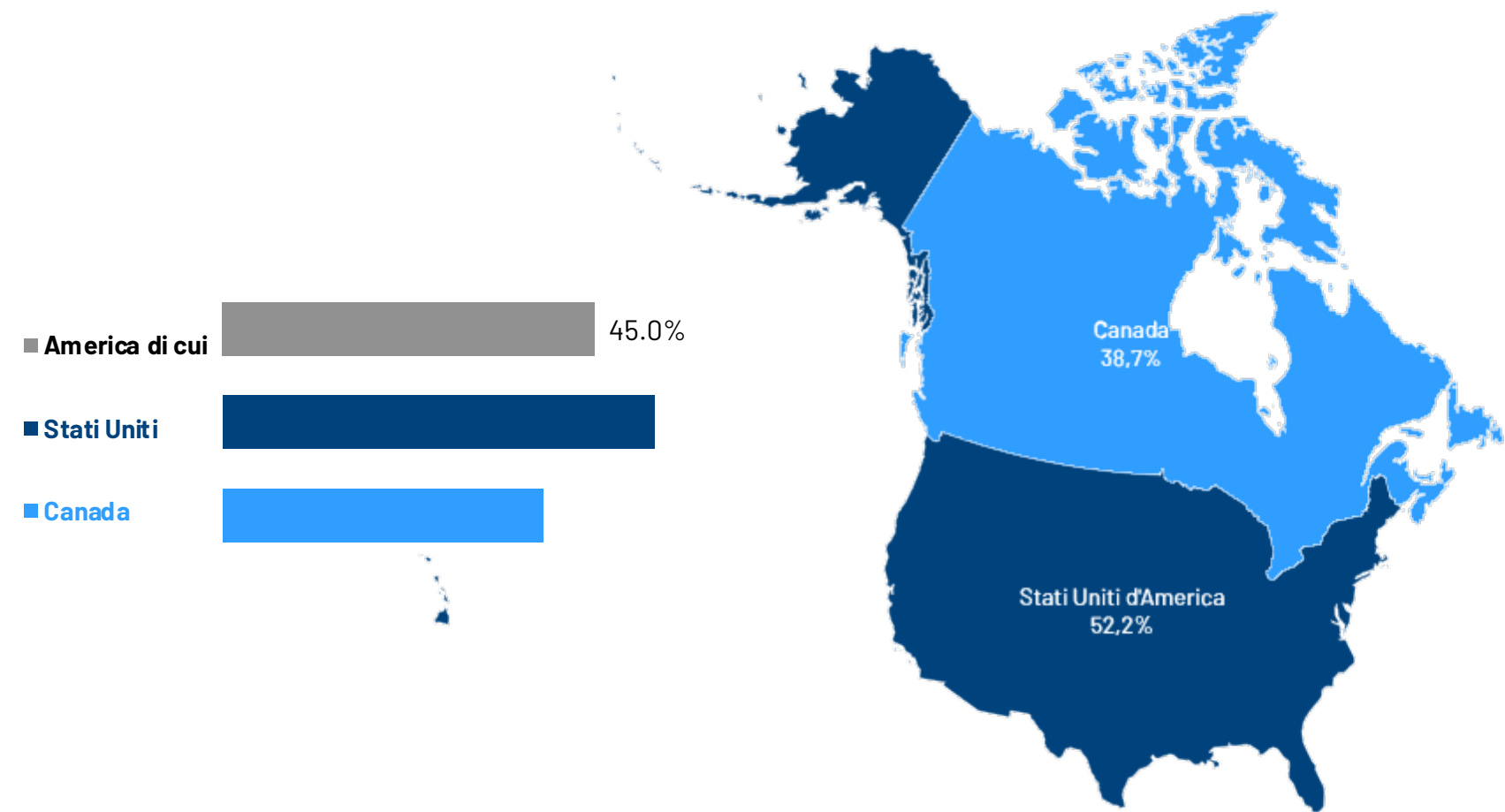
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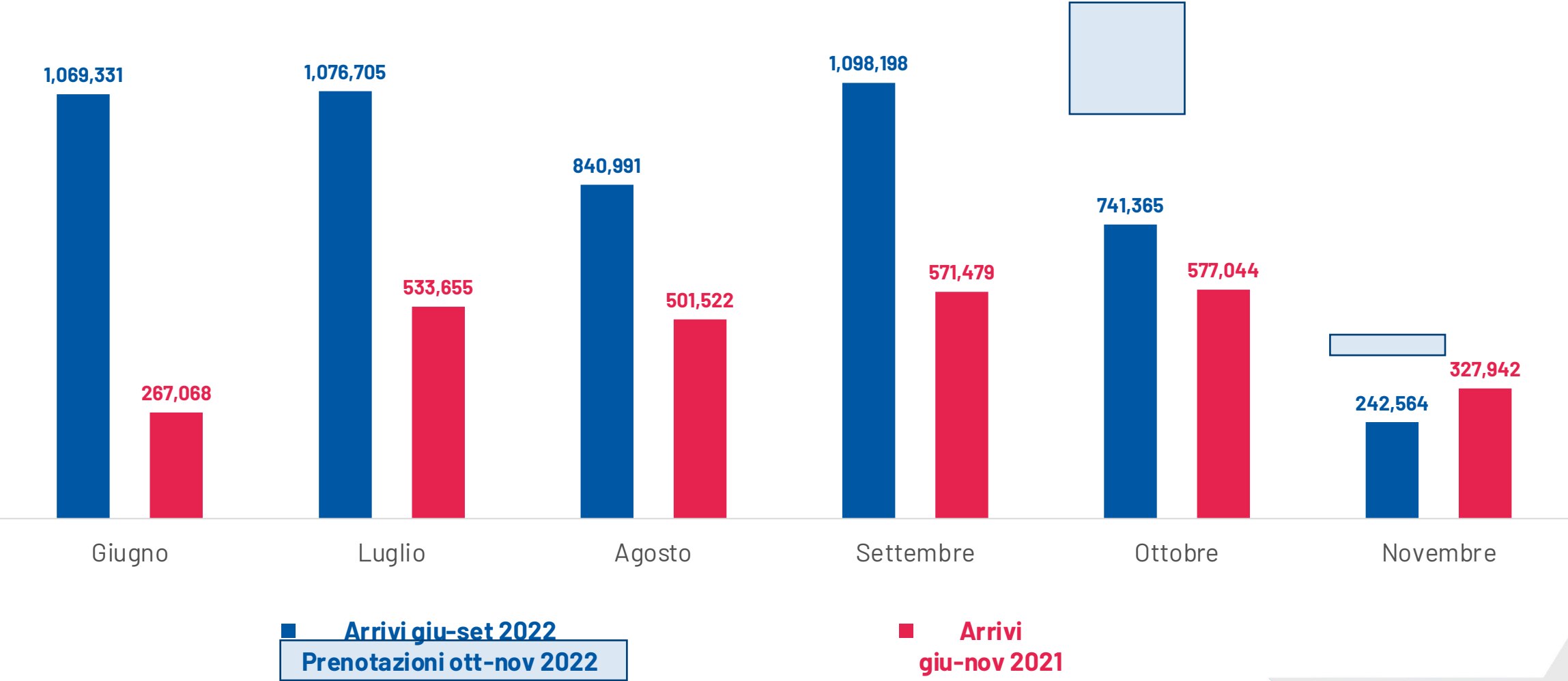
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Monitoring of arrivals and international flight bookings to Italy

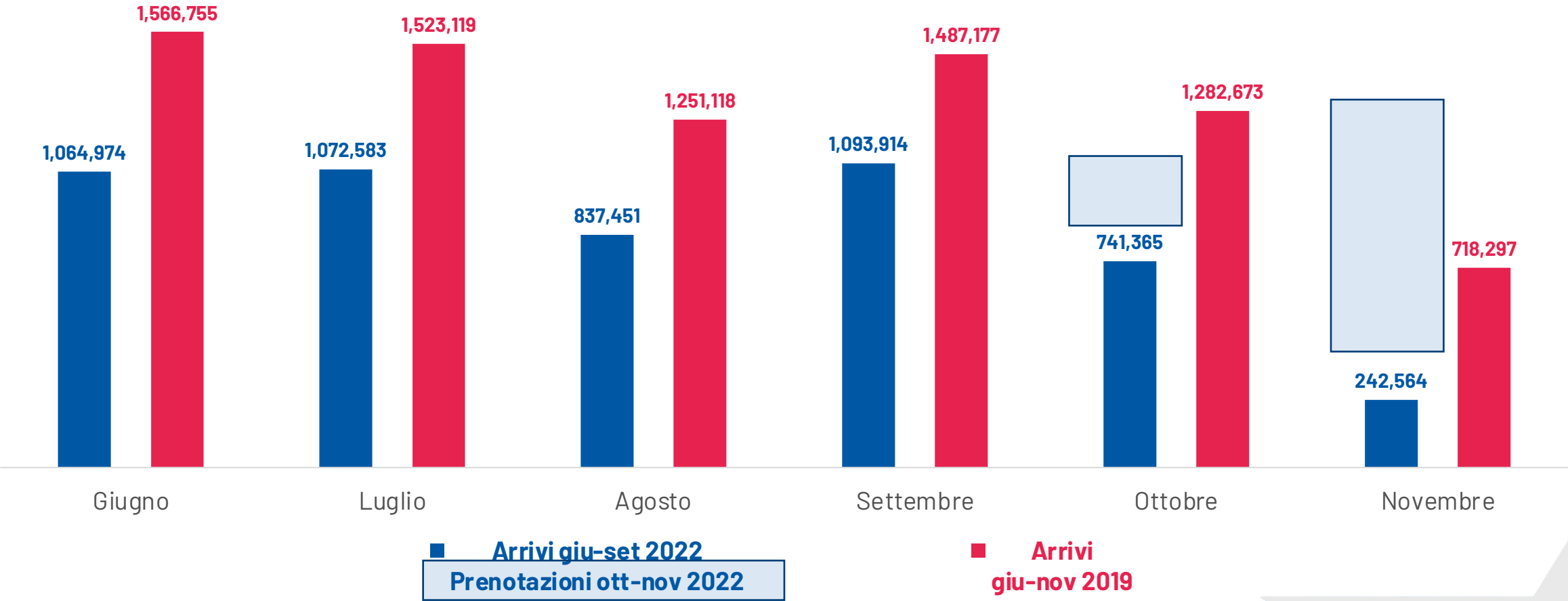
Past arrivals against bookings for the coming months in Italian airports - comparison between 2022 and 2021, on 20/10/2022



Source: ENIT Research Department using Forward Data – updated to 09/10/2022

Monitoring of arrivals and international flight bookings to Italy

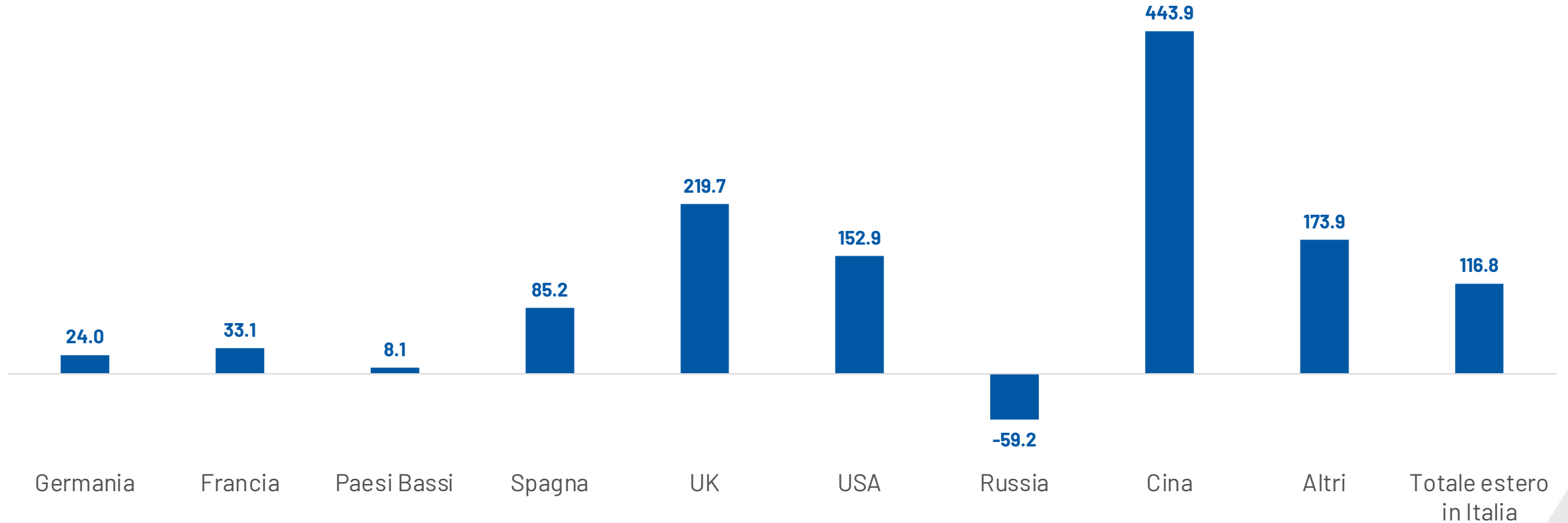
Past arrivals against bookings for the coming months in Italian airports - comparison between 2022 and 2019, on 20/10/2022



Source: ENIT Research Department using ForwardKeys data - updated to 09/10/2022

Monitoring of international flight bookings to Italy - September

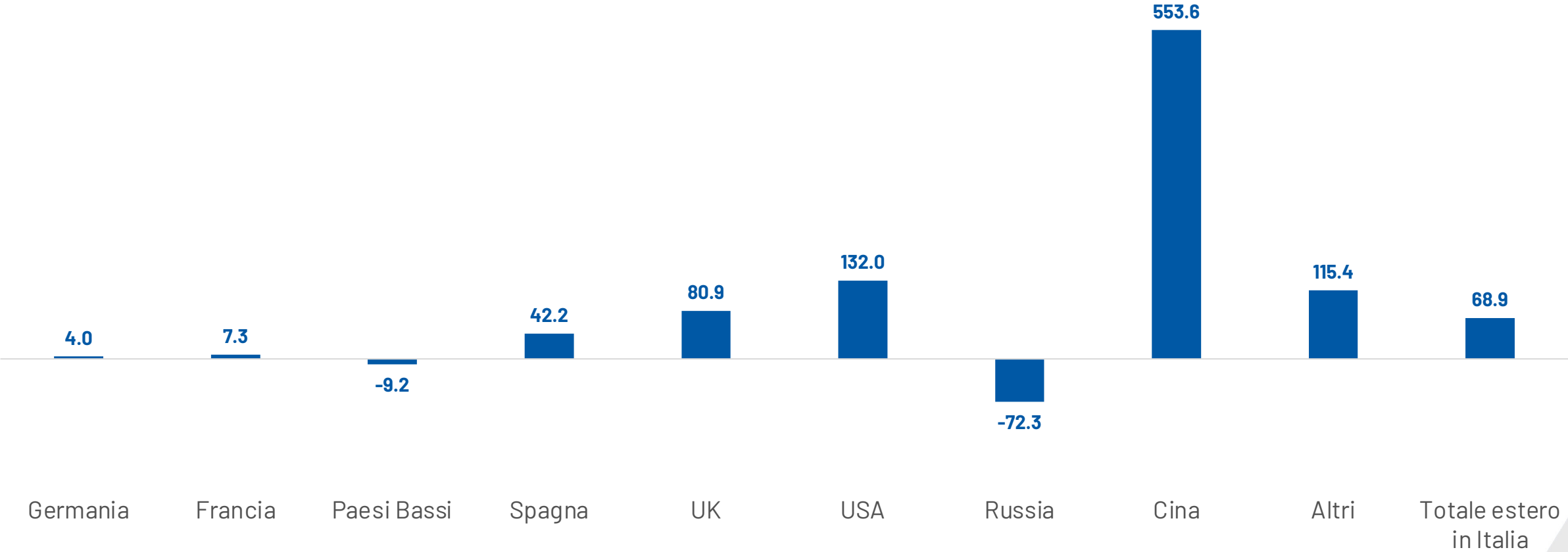
2022 Bookings by country of origin - % variation September 2022 against 2021, on 20/10/2022



Source: ENIT Research Department using Forward Data – updated to 09/10/2022

Monitoring of international flight bookings to Italy - October

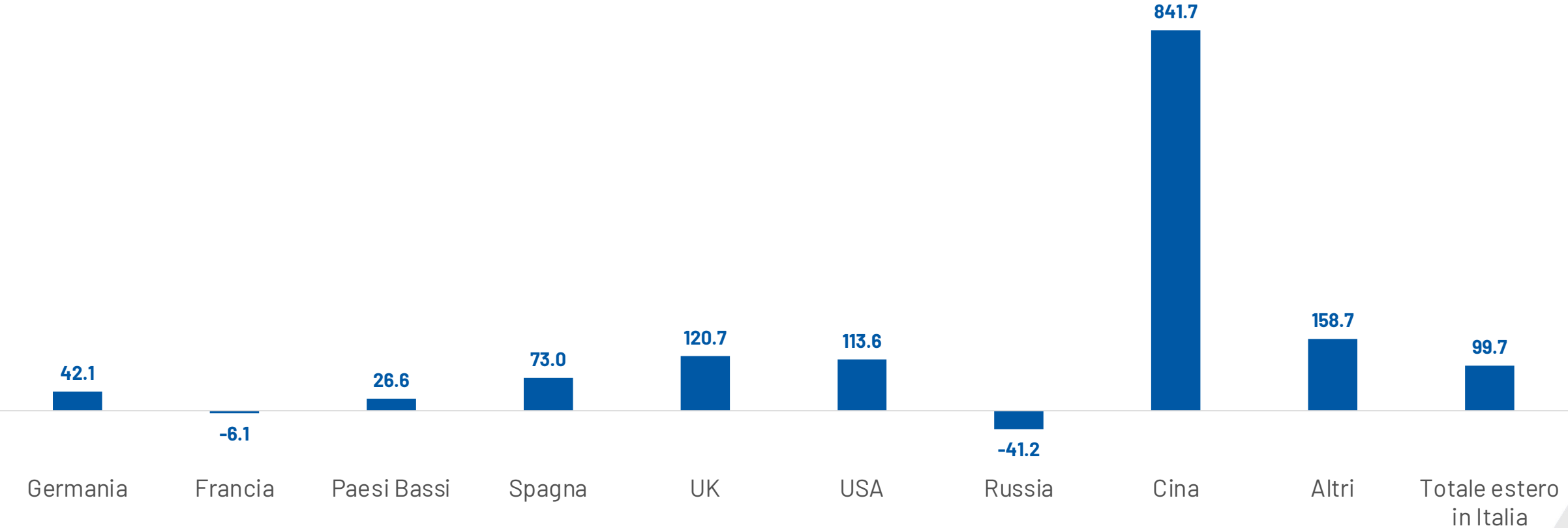
Bookings by country of origin - % variation October 2022 against 2021, on 20/10/2022



Source: ENIT Research Department using Forward Data – updated to 09/10/2022

Monitoring of international flight bookings to Italy - November

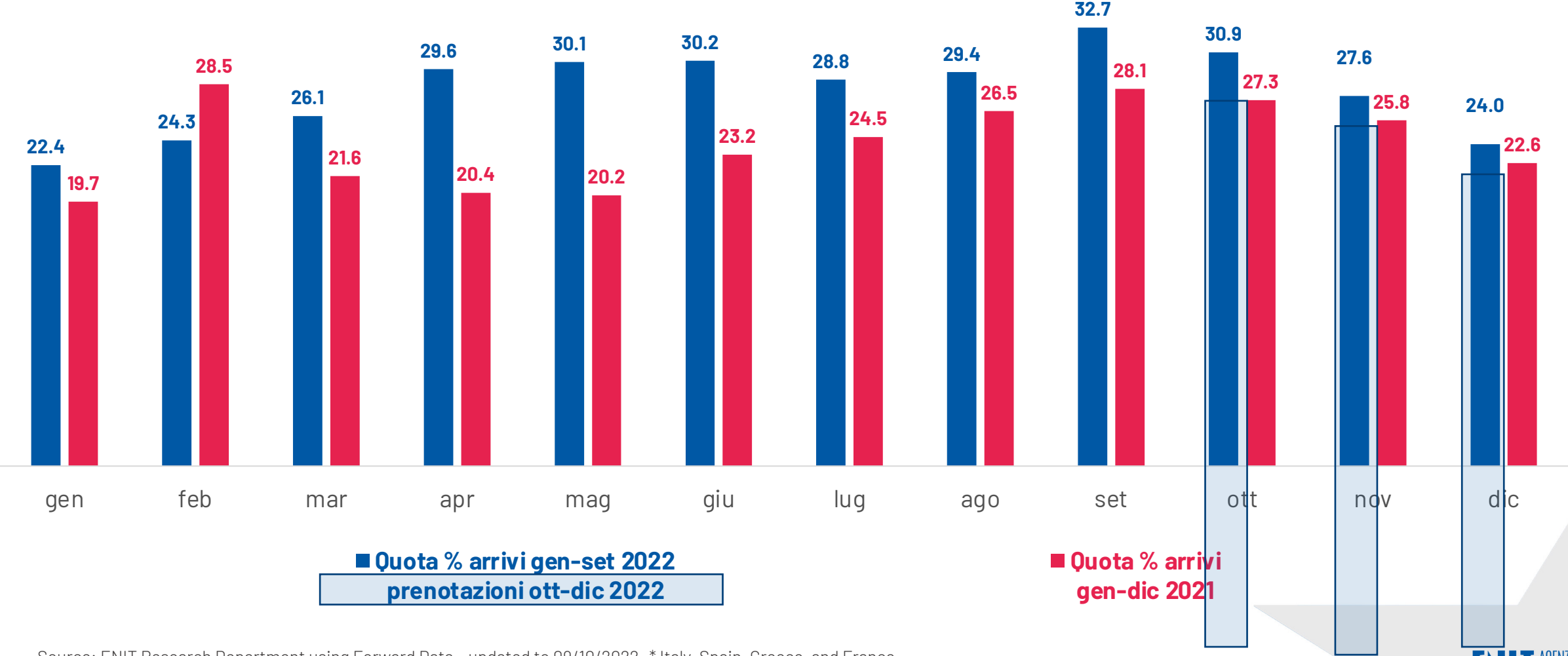
2022 Bookings by country of origin - % variation August 2022 against 2021, on 20/10/2022



Source: ENIT Research Department using Forward Data – updated to 09/10/2022

Monitoring the share of forecast international flight arrivals for Italy

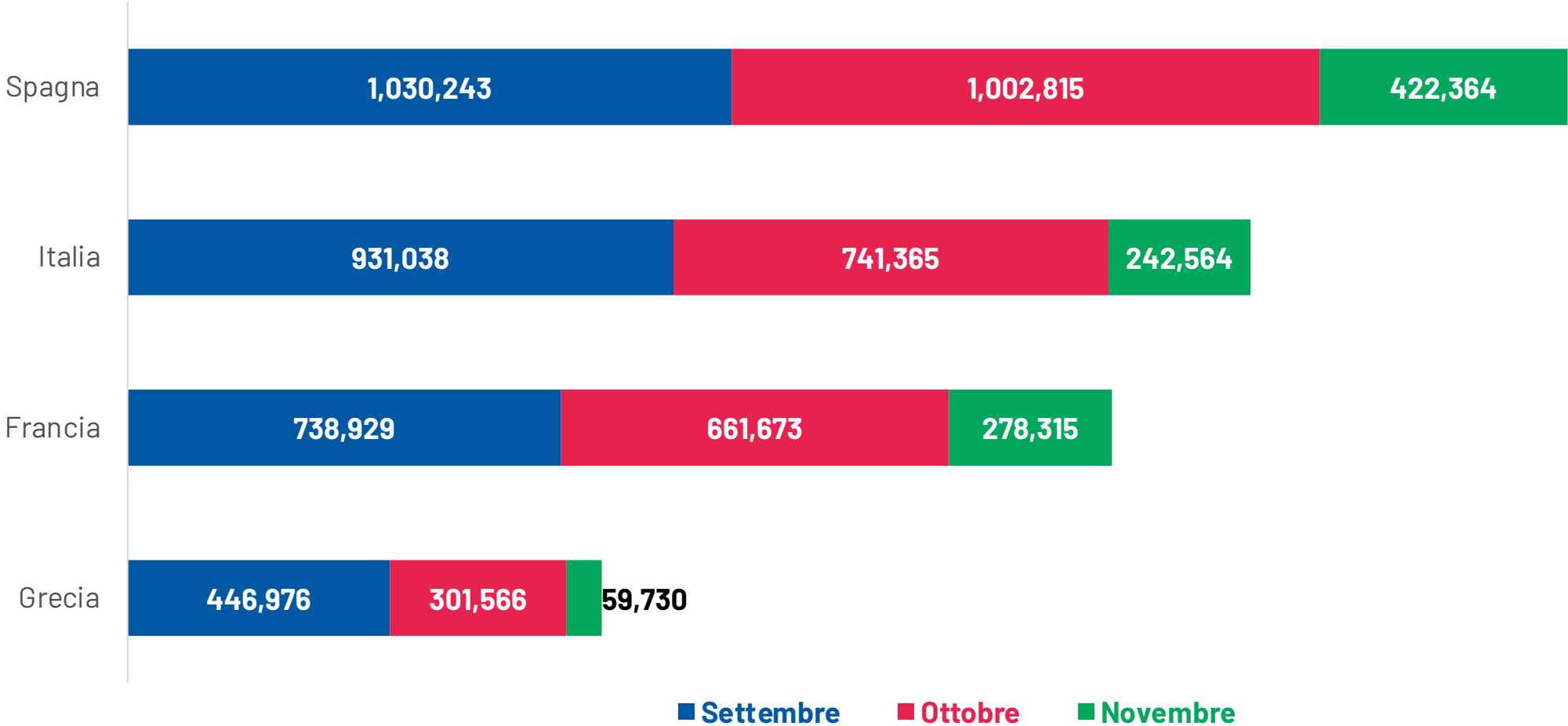
% Share of all foreign arrivals/bookings at the airports
of the main EU countries in the Mediterranean*- 2022-2021, on 20/10/2022



Source: ENIT Research Department using Forward Data – updated to 09/10/2022 –* Italy, Spain, Greece, and France

Monitoring of international flight bookings - Italy and competitors

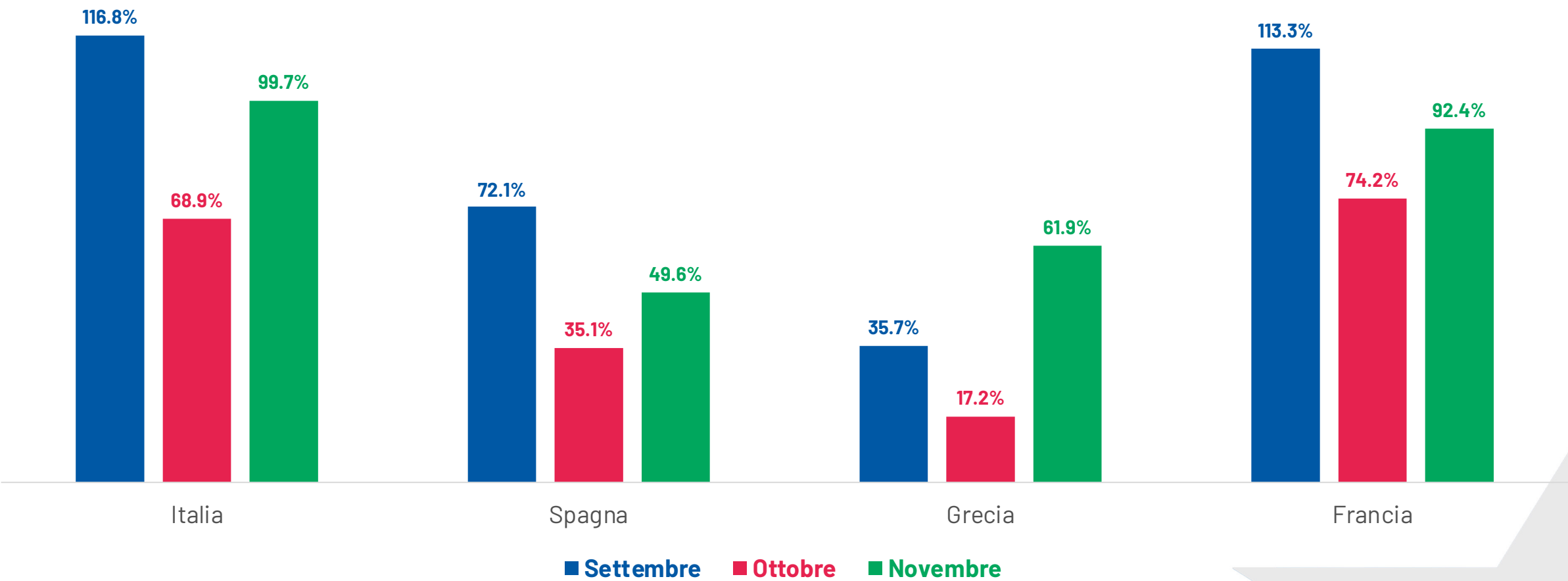
Bookings Autumn 2022, on 20/10/2022



Source: ENIT Research Department using Forward Data – updated to 09/10/2022

Monitoring of international flight bookings - Italy and competitors

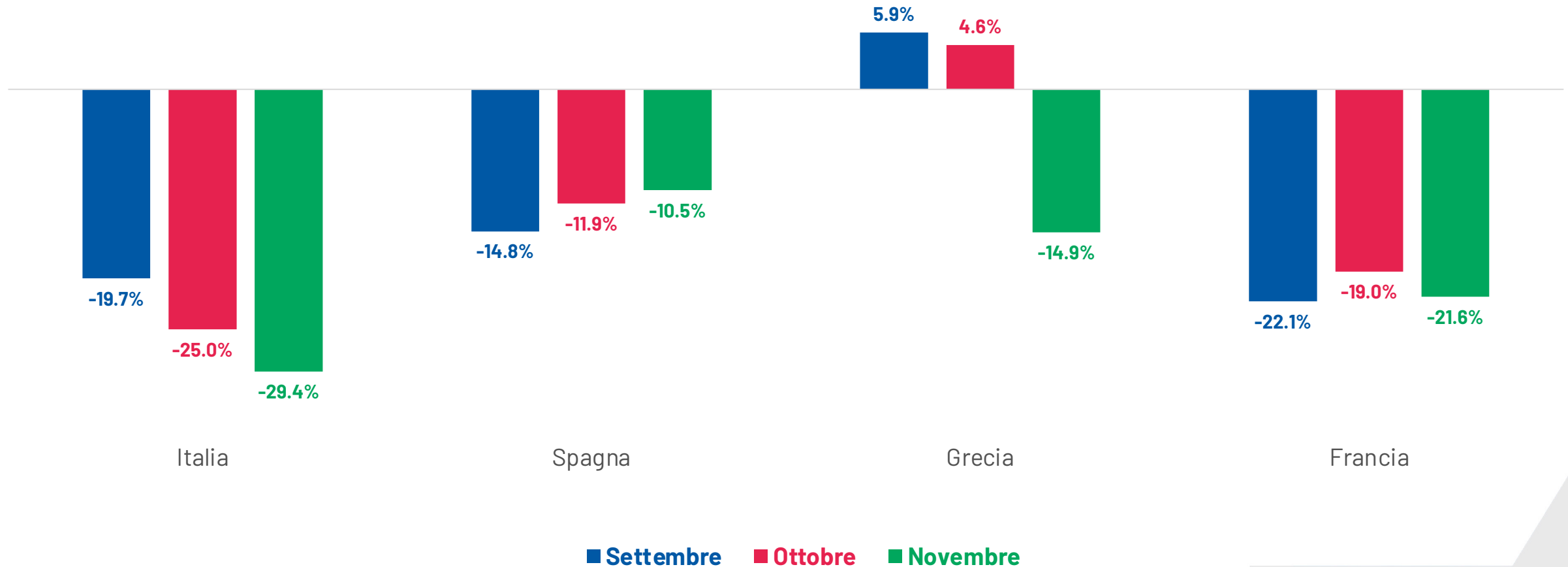
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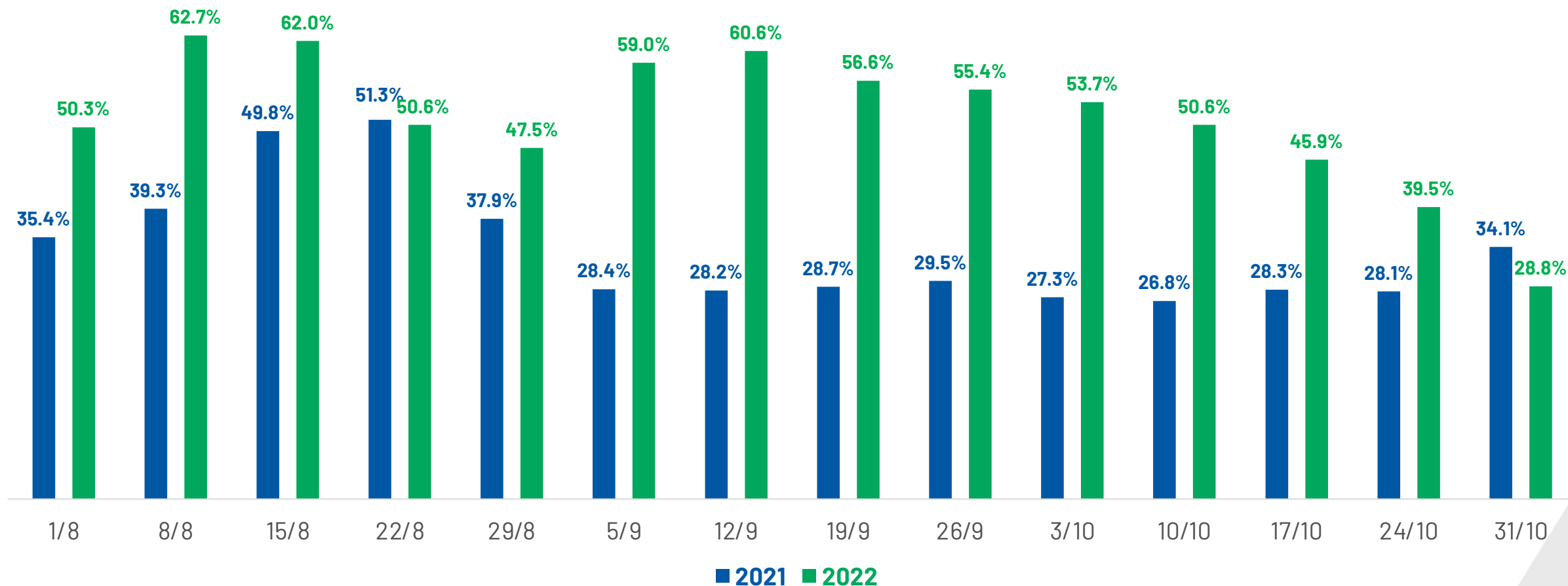
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Accommodation bookings using Online Travel Agencies - Weekly data

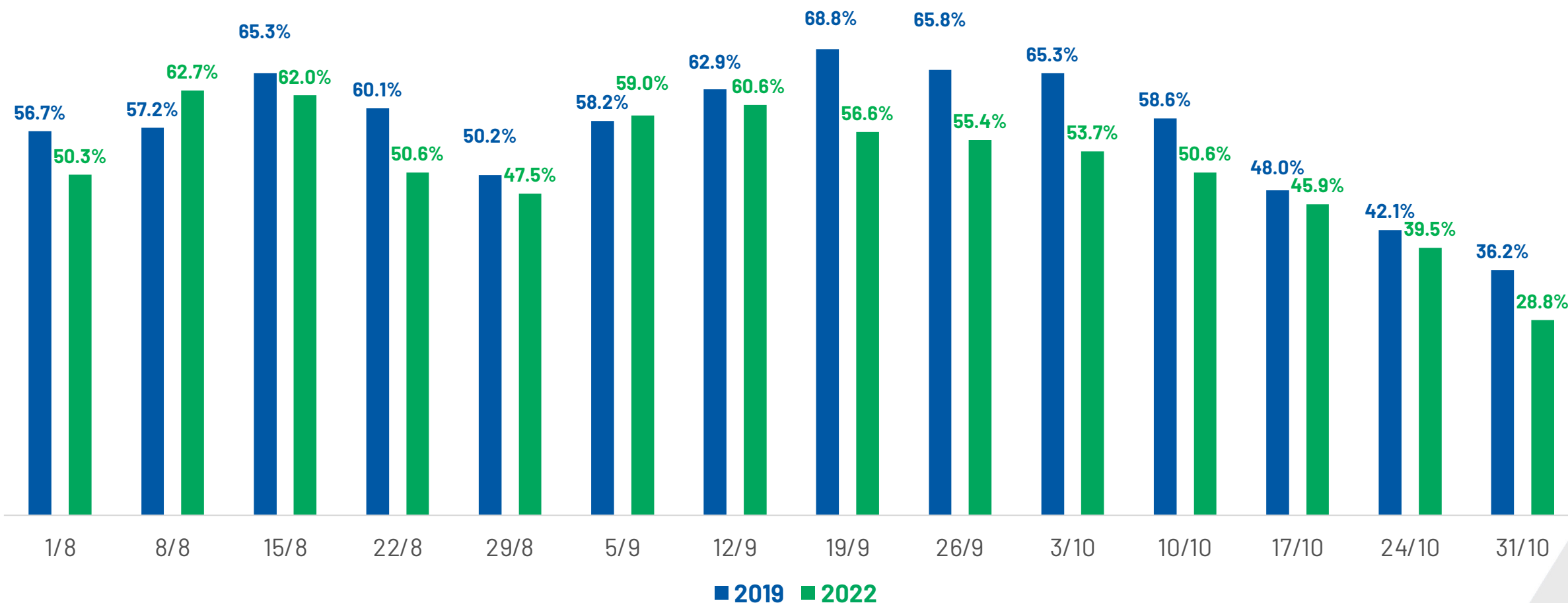
Products offered by major OTAs - accommodation occupancy rates: comparison of 2022 with 2021



Source: ENIT Research Department using The Data Appeal Company data, on 20/10/2022

Accommodation bookings using Online Travel Agencies - Weekly data

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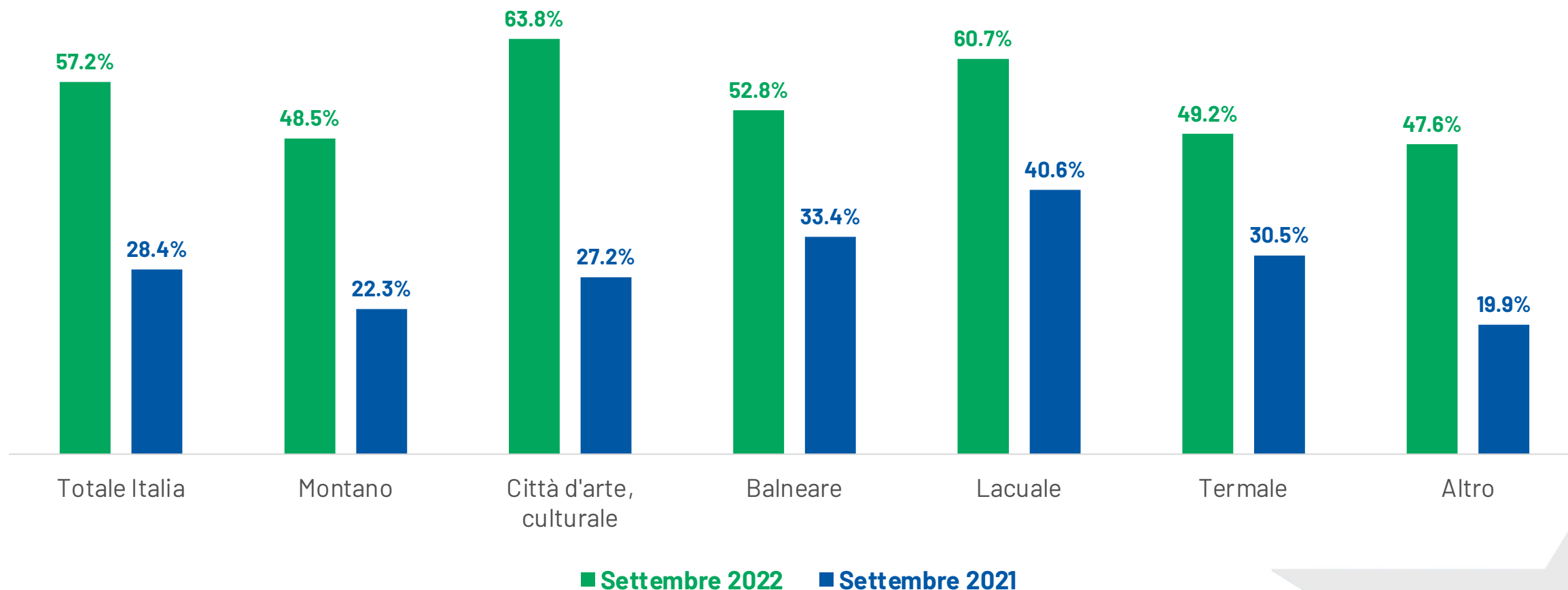


Source: ENIT Research Department using The Data Appeal Company data, on 20/10/2022

Accommodation bookings through Online Travel Agencies

September 2022/2021

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

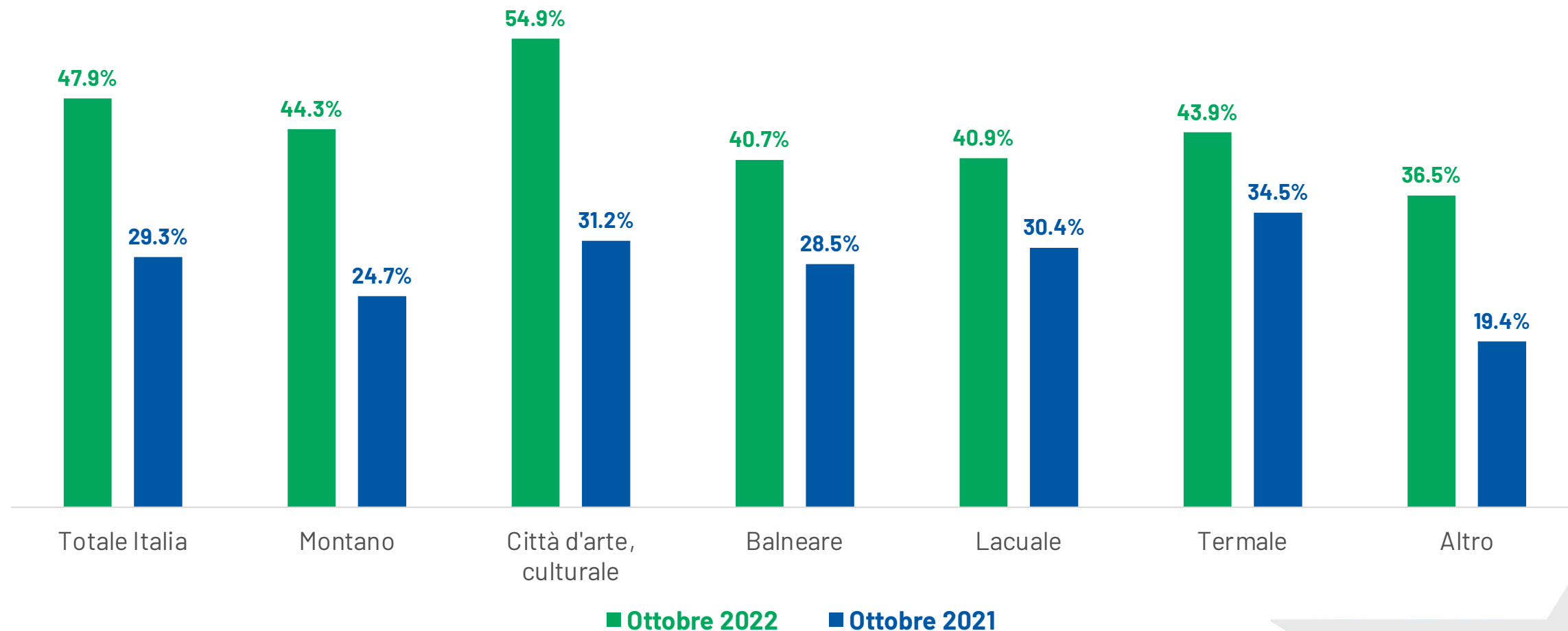


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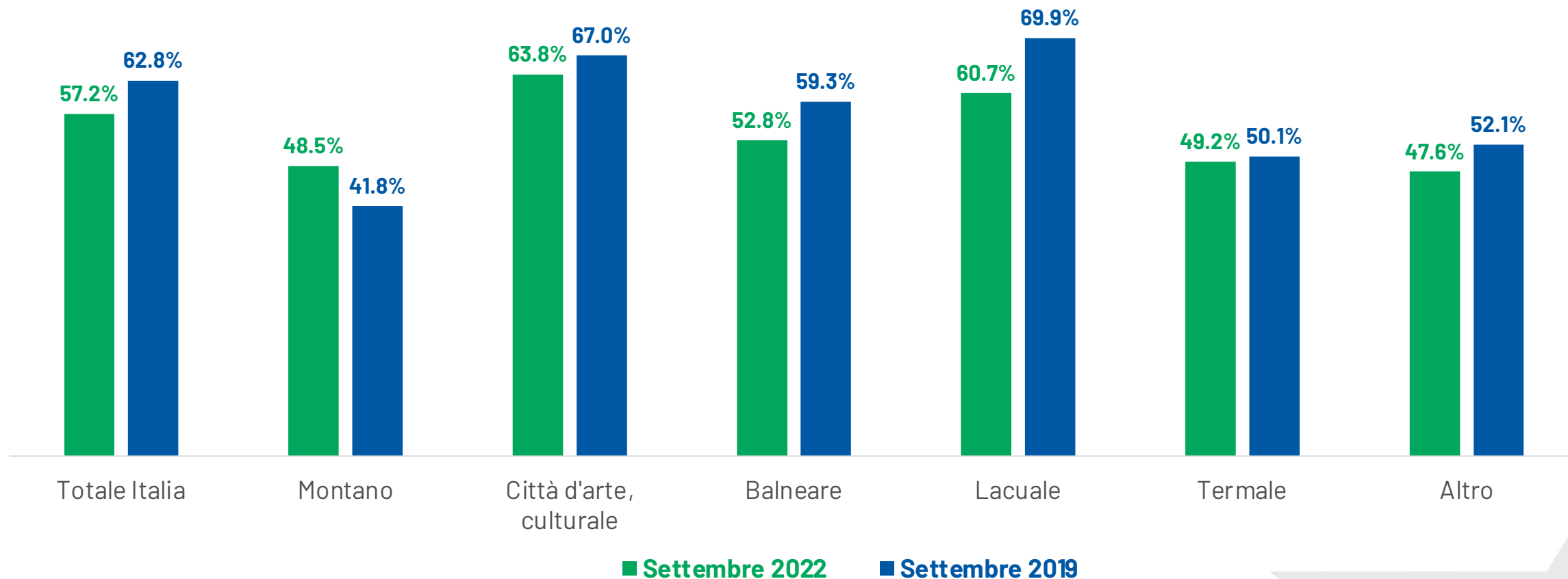


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Accommodation bookings through Online Travel Agencies

September 2022/2019

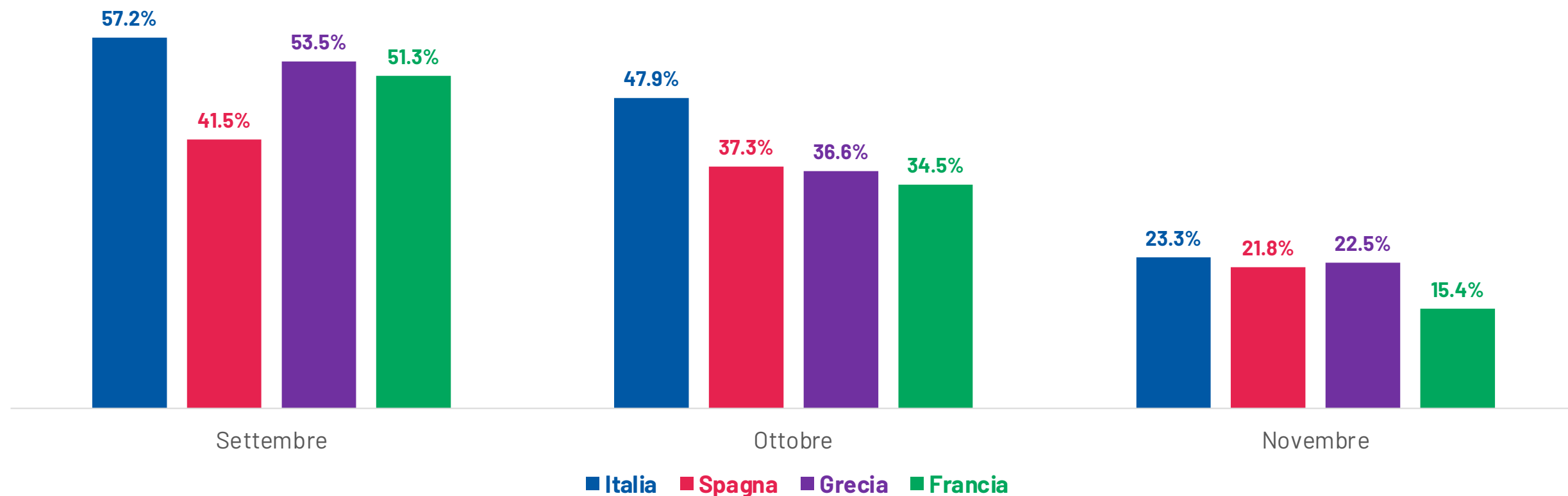
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Accommodation bookings through Online Travel Agencies Italy and competitors

Products offered by major OTAs - occupancy rates Autumn 2022



Source: ENIT Research Department using The Data Appeal Company data, on 20/10/2022



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