ENIT BULLETIN

In-depth analysis of trends in tourism

July W4

By the

Research Department

ENIT - ITALIAN NATIONAL TOURIST BOARD

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Position of Italy in terms of interest in international travel

Global destination by volume of interest in travel searches - Flight + accommodation						
Rank	Area	Volume of interest	Country	Volume of interest	City	Volume of interest
1	Southern Europe	100	USA	100	London	100
2	Western Europe	59	Spain	93	Paris	70
3	Western Asia	47	Italy	72	Dubai	62
4	North America	45	United Kingdom	72	New York	50
5	Northern Europe	43	France	62	Amsterdam	43
6	South East Asia	30	Turkey	53	Barcelona	40
7	South Asia	23	Germany	42	Lisbon	40
8	Central America	16	Greece	40	Istanbul	38
9	North Africa	16	India	38	Rome	35
10	Eastern Europe	16	UAE	38	Denpasar	34
18					Milan	19

Destinations with the fastest growth in the world in terms of interest in travel
75%
Turkey

Interest among international tourists in trips to Italy

Search interest in travel to Italy Accommodation 2022/2021

94   93   89   100   96

69   68   80   76   70

19/6   26/6   3/7   10/7   17/7
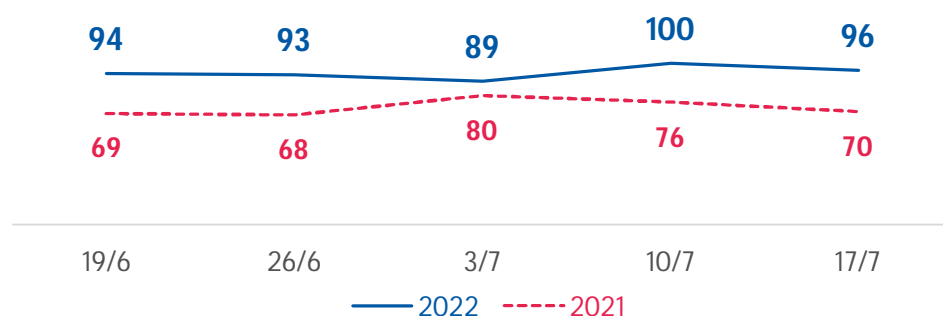
—— 2022   ----- 2021

Search interest in travel to Italy Flight 2022/2021

98   100   93   91   90

49   50   54   54   50

19/6   26/6   3/7   10/7   17/7
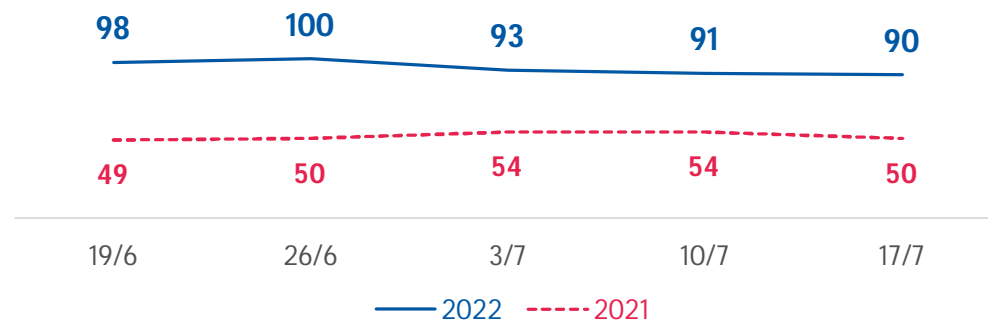
—— 2022   ----- 2021

Search interest in travel to Italy Accommodation + flight 2022/2021

99   100   94   97   95

71   72   45   54   61   (average +61.0%)

58   58   65   63   59

19/6   26/6   3/7   10/7   17/7

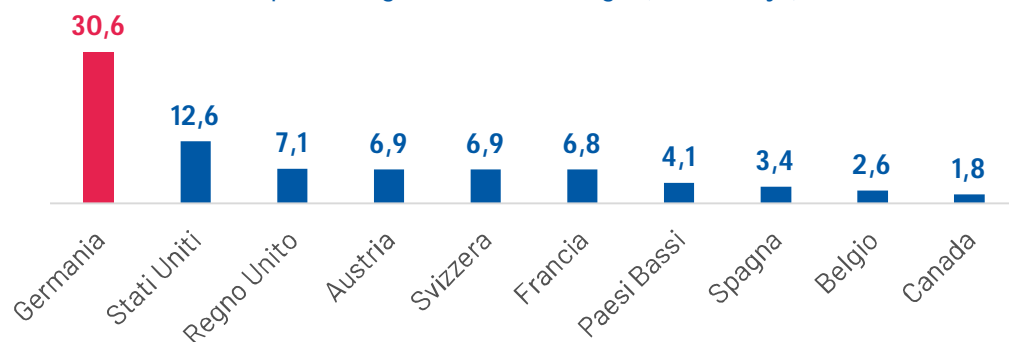—— 2022   ----- 2021   —— Var.% 2022/2021
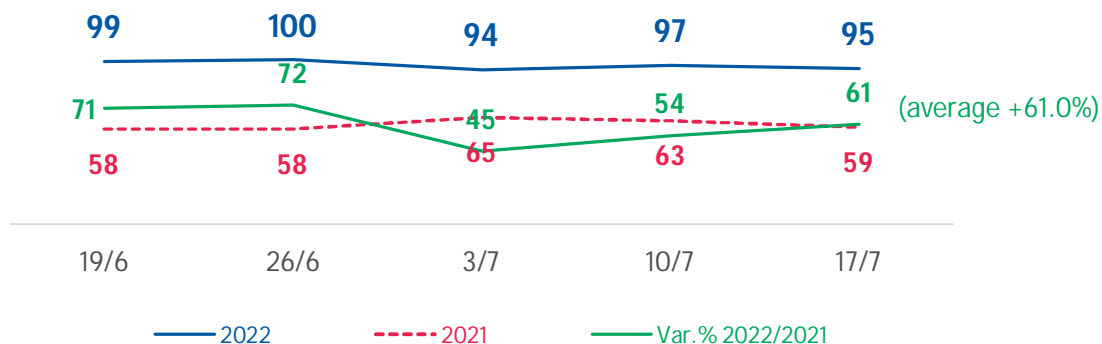
For the period analysed, the search data for travel to Italy shows that interest peaked on 26 June.

Comparison with the same dates from 2021 shows that the greatest variation (in %) was on the same day (+72%).

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The main countries interested in Italy

% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)

Germania	Stati Uniti	Regno Unito	Austria	Svizzera	Francia	Paesi Bassi	Spagna	Belgio	Canada
30,6	12,6	7,1	6,9	6,9	6,8	4,1	3,4	2,6	1,8

% interest in incoming travel - Flight
Top 10 foreign countries of origin (last 30 days)

Regno Unito	Germania	Francia	Spagna	Stati Uniti	Polonia	Paesi Bassi	Romania	Svizzera	Grecia
16,5	13,4	11,3	10,6	9,9	4,7	3,5	2,3	2,3	2,0

% interest in incoming travel – Accommodation + flight
Top 10 foreign countries of origin (last 30 days)

Germania	Regno Unito	Stati Uniti	Francia	Spagna	Svizzera	Paesi Bassi	Polonia	Austria	Canada
19,2	13,3	10,8	9,8	8,2	3,8	3,7	3,6	3,6	1,8

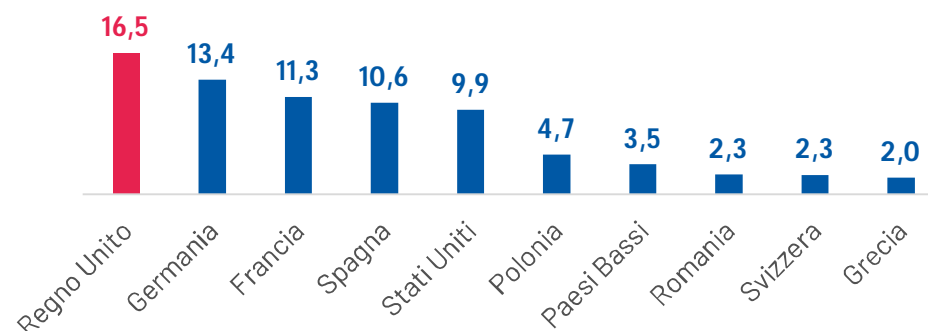**Country with greatest interest in incoming travel: Germany**

Source: ENIT Research Department using Google Destination Insights (for the period from 19/06/22 to 20/07/22, as recorded on 27/07/22) – All data is indexed
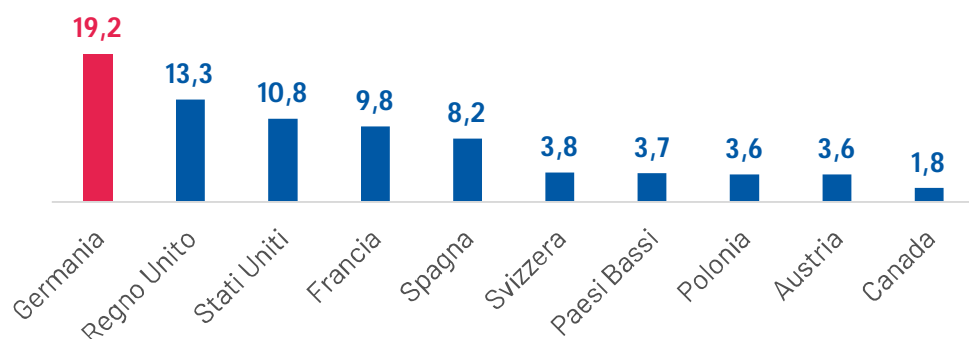
The main destinations of international tourists
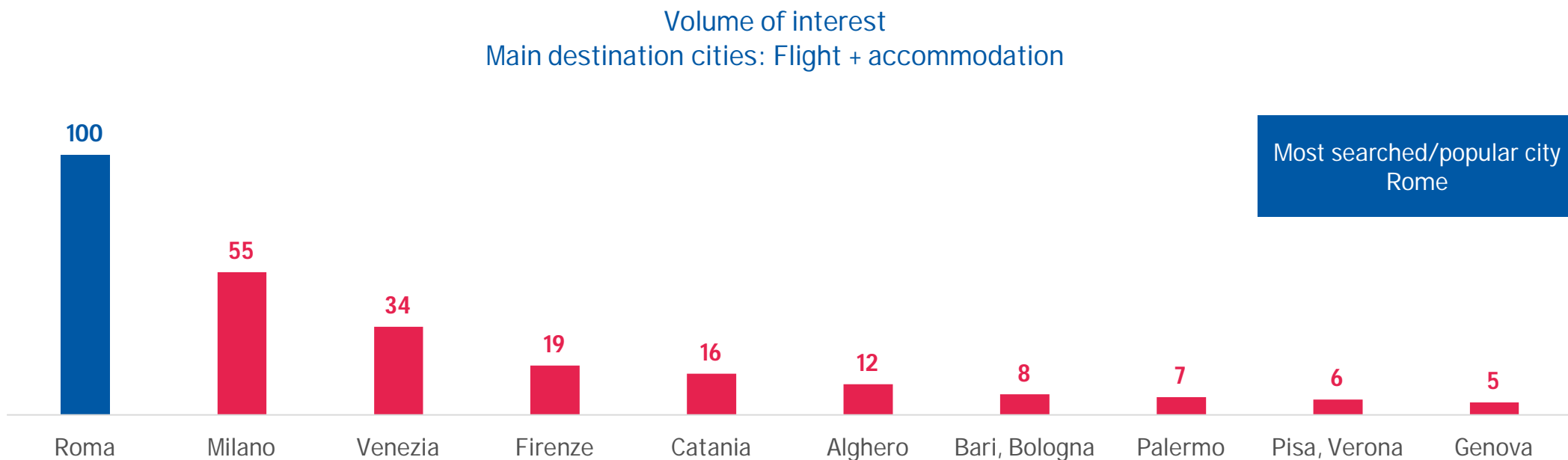
Volume of interest
Main destination cities: Flight + accommodation

Most searched/popular city
Rome

Roma	Milano	Venezia	Firenze	Catania	Alghero	Bari, Bologna	Palermo	Pisa, Verona	Genova
100	55	34	19	16	12	8	7	6	5

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Interest among Italian tourists in travel in Italy

**TOP 5 regions of origin
in terms of volume of interest – Flight + accommodation**

Lombardia	Lazio	Campania	Veneto	Emilia-Romagna
100	54	44	40	37
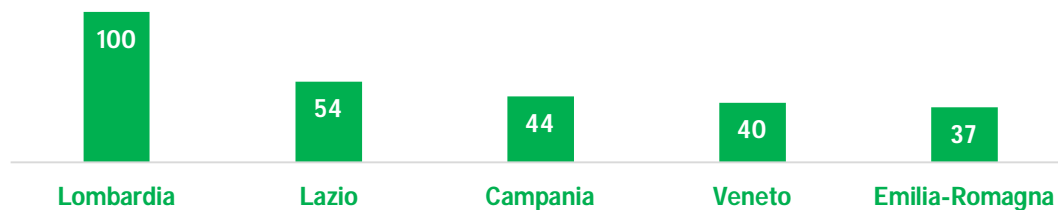
**TOP 5 destination regions
in terms of volume of interest – Flight + accommodation**

Sicilia	Emilia-Romagna	Sardegna Puglia	Lombardia, Veneto	Toscana
100	89	69	68	63

**TOP 5 destination cities
in terms of volume of interest – Flight + accommodation**

Milano	Roma	Catania	Palermo	Olbia
100	99	76	56	43
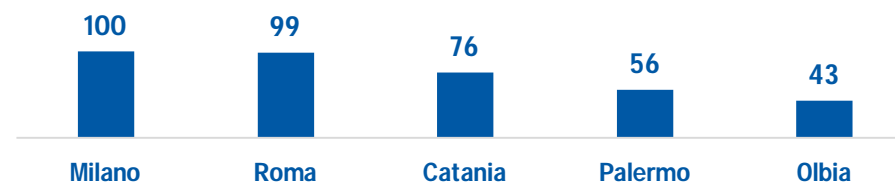
Growth for the main destinations, based on increased interest in consumer searches compared to a month ago

10% to 25%
Rimini, Cesenatico, Vieste, Ischia, Senigallia, Misano Adriatico, Syracuse, etc.

**% interest in outgoing travel – Flight + accommodation
Top 5 foreign destination countries (last 30 days)**

Travelling abroad

Spagna	Francia	Grecia	Regno Unito	Stati Uniti
15,8	10,5	7,0	6,8	6,4

Source: ENIT Research Department using Google Destination Insights (for the period from 19/06/22 to 20/07/22, as recorded on 27/07/22) – All data is indexed
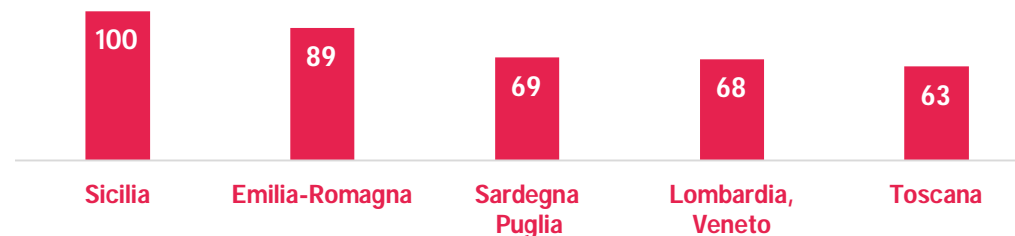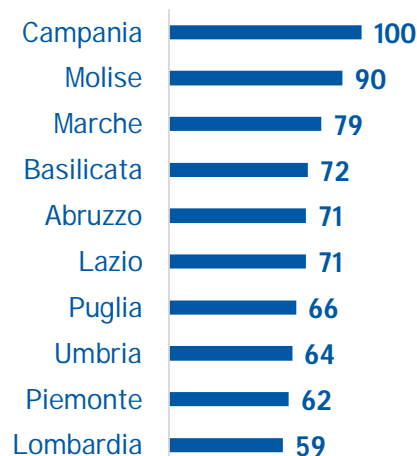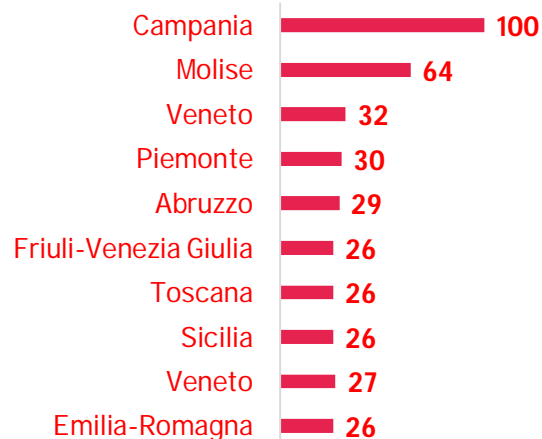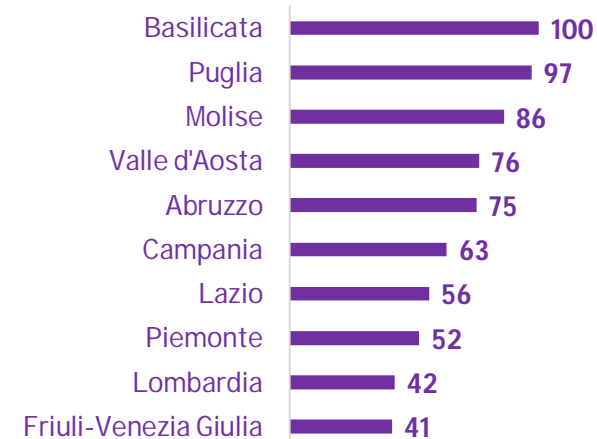
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Searches for Italy – Holidays

Holiday searches
Travel category: interest by region

Region	Value
Campania	100
Molise	90
Marche	79
Basilicata	72
Abruzzo	71
Lazio	71
Puglia	66
Umbria	64
Piemonte	62
Lombardia	59

Holiday searches
Travel category: tourist destinations
Interest by region

Region	Value
Campania	100
Molise	64
Veneto	32
Piemonte	30
Abruzzo	29
Friuli-Venezia Giulia	26
Toscana	26
Sicilia	26
Veneto	27
Emilia-Romagna	26

Holiday searches
Travel category: hotels and accommodation
Interest by region

Region	Value
Basilicata	100
Puglia	97
Molise	86
Valle d'Aosta	76
Abruzzo	75
Campania	63
Lazio	56
Piemonte	52
Lombardia	42
Friuli-Venezia Giulia	41

Among the correlated subjects for holidays – travel/tourist destinations	
Increasing	**Most searched**
<u>Subject:</u> low-cost airline +140%; summer holidays +120%; last-minute trips +110% <u>Place/municipality/city:</u> Casal Velino +300%; Palinuro +70%; Amalfi Coast +60% <u>Month:</u> September +110%; February +80% <u>Accommodation facility:</u> Bungalow +80%	<u>Subject:</u> holiday, home, last-minute trips <u>Accommodation facility:</u> all-inclusive resort <u>Place/municipality:</u> Palinuro, Cilento, Amalfi Coast <u>Month:</u> August, September, October

Source: ENIT Research Department using Google Trends data on 27/07/2022 – Last 30 days

Accommodation bookings through OTAs
Summary 2022 - compared with 2021

**% occupancy of accommodation
in OTA channels on 27/07/2022**

Product	July		August		September	
	2022	2021	**2022**	2021	**2022**	2021
Total for Italy	**53.4**	30.0	**37.4**	42.8	**24.8**	28.4
Mountains	**51.6**	29.1	**46.1**	46.9	**23.8**	22.3
Art and culture	**52.8**	26.3	**32.2**	36.4	**26.1**	27.2
Beach	**59.4**	39.1	**47.5**	57.2	**25.8**	33.4
Lake	**66.1**	42.7	**57.6**	61.7	**34.6**	40.6
Spa	**46.6**	30.1	**36.8**	50.4	**20.7**	30.5
Other	**39.9**	20.7	**29.1**	34.3	**15.9**	19.9

Bookings for accommodation facilities through Online Travel Agencies currently stand at 53.4% of the capacity for the month of July, which is 23.4 percentage points more than last year. **They are above the national average in the fields of lakes (66.1%) and beach resorts (59.4%).** All categories have made up ground on 2021, especially artistic and cultural towns and cities (+26.5) and lakes (+23.4).
At present, bookings cover **37.4% of the capacity for August**. The highest figure is for lakes (57.6%). The figures for beach resorts (47.5%) and the mountains (46.1%) are also above the national average.
The occupancy rate for the month of September stands at approximately 25.0%. Leading the drive on this front are bookings for lakes (34.6%), artistic and cultural towns and cities (26.1%) and beach resorts (25.8%).

Source: ENIT Research Department using The Data Appeal Company data

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Accommodation bookings through OTAs
Summer 2022

**Average price and % occupancy for accommodation facilities in Italy
booked through OTAs, as of 27/07/2022 - Weekly data**

	4/7	11/7	18/7	25/7	1/8	8/8	15/8	22/8	29/8	5/9	12/9	19/9	26/9
€	141	142	142	144	151	160	158	148	144	142	139	138	137
% Saturazione	51,4	56,8	57,6	49,8	41,2	44,4	40,0	30,4	25,4	28,3	25,6	23,1	18,6

—— € —— % Saturazione

Source: ENIT Research Department using The Data Appeal Company data

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Accommodation bookings through OTAs - Italy and competitors Summer 2022

**% occupancy of accommodation
in OTA channels on 27/07/2022 - Italy and competitors**

	Italia	Spagna	Grecia	Francia
Luglio	53,4	38,4	57,4	38,2
Agosto	37,4	34,1	49,3	21,7
Settembre	24,8	17,0	24,3	14,1

■ **Italia** ■ **Spagna** ■ **Grecia** ■ **Francia**

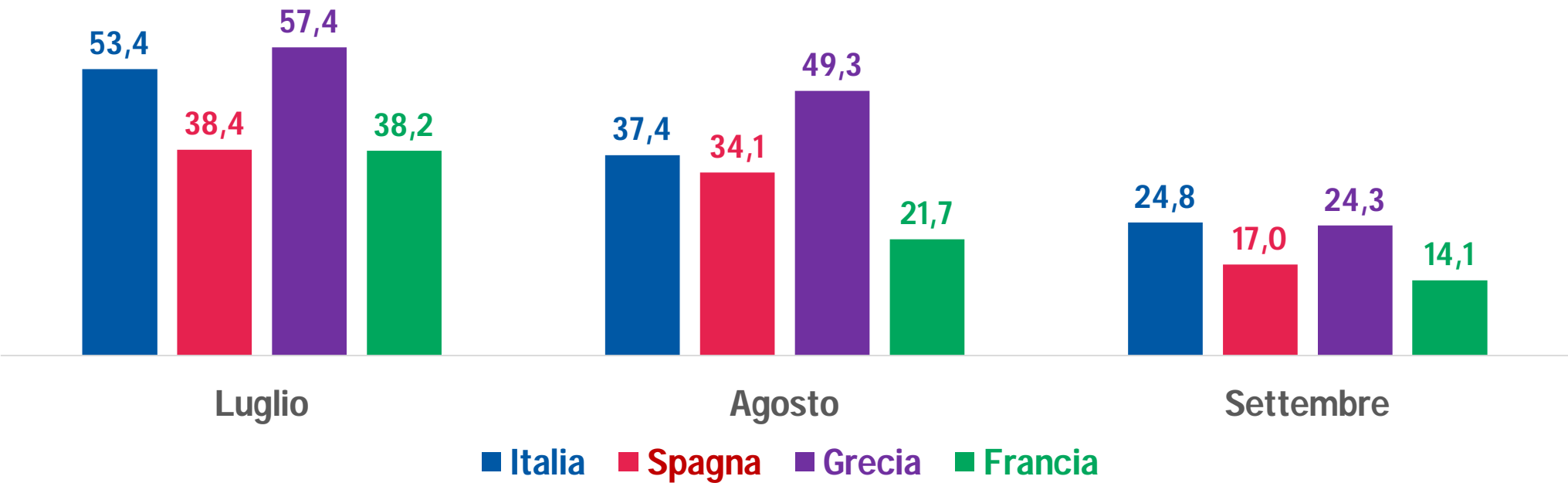Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs
July 2022 - compared with 2019

July: % occupancy of accommodation
in OTA channels on 27/07/2022

	Totale Italia	Montano	Città d'arte, culturale	Balneare	Lacuale	Termale	Altro
2022	53,4	51,6	52,8	59,4	66,1	46,6	39,9
2019	57,5	39,2	61,0	57,2	66,5	41,1	43,3

■ 2022 ■ 2019
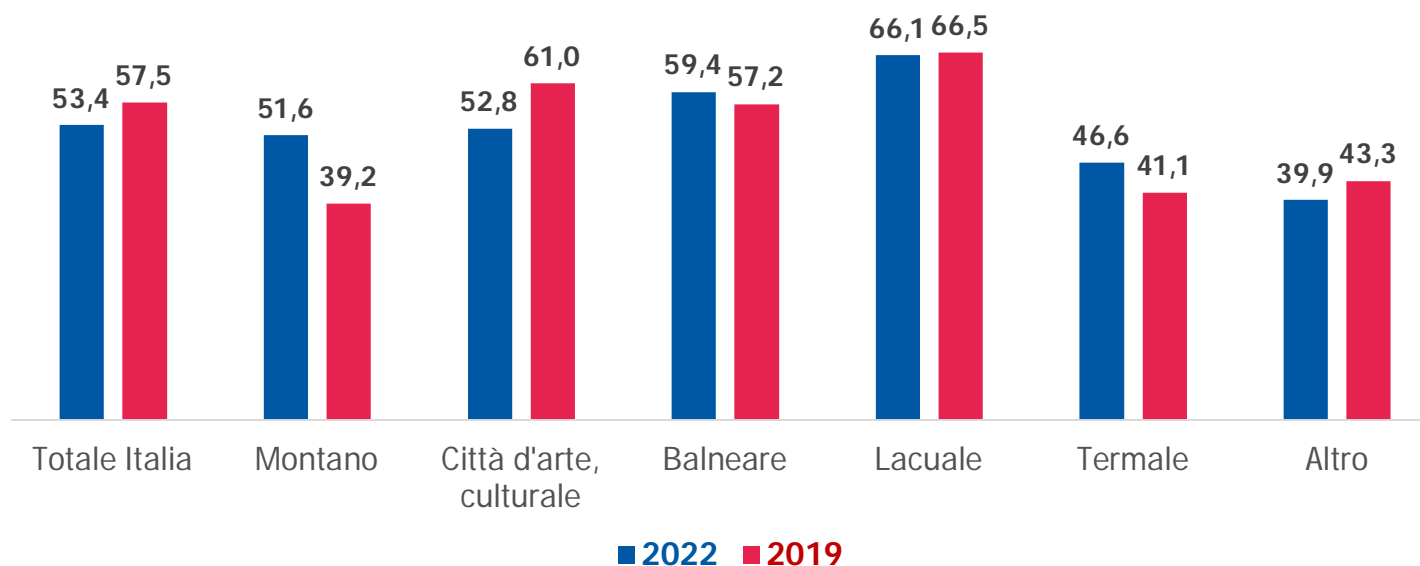
At present, overall bookings for July are down by 4.1 percentage points on 2019.
Three categories have made up ground: the mountains (+12.4), spas (+5.5) and beach resorts (+2.2).

Source: ENIT Research Department using The Data Appeal Company data

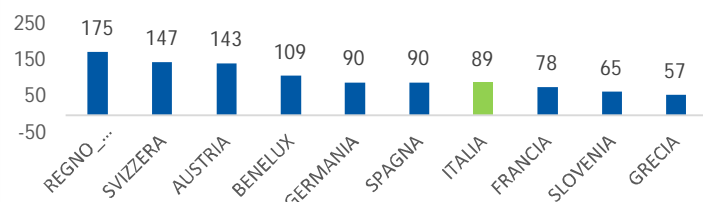# International price comparison - 5th weekend in July

HOTELS

Average price on weekend of 29-31 July, booked on 25 July - Hotel room for two Product: ARTISTIC AND CULTURAL TOWNS AND CITIES

REGNO_UNI...	SVIZZERA	BENELUX	AUSTRIA	ITALIA	FRANCIA	SLOVENIA	SPAGNA	GERMANIA	GRECIA
243	204	168	153	129	120	119	119	118	101

Average price on weekend of 29-31 July, booked on 25 July - Hotel room for two Product: MOUNTAINS

SVIZZERA	ITALIA	AUSTRIA	GERMANIA	CROAZIA	FRANCIA	SLOVENIA	SPAGNA
246	220	182	182	146	133	127	106

Average price on weekend of 29-31 July, booked on 25 July - Hotel room for two Product: SPA

SVIZZERA	AUSTRIA	GERMANIA	REGNO_UNITO	FRANCIA	CROAZIA	SLOVENIA	ITALIA	SPAGNA	GRECIA
194	171	162	159	156	143	138	110	98	79

Average price on weekend of 29-31 July, booked on 25 July - Hotel room for two Product: BEACH

GRECIA	CROAZIA	FRANCIA	ITALIA	SLOVENIA	SPAGNA	REGNO_UNITO
254	227	213	202	196	164	163

Average price on weekend of 29-31 July, booked on 25 July - Hotel room for two Product: LAKE

SVIZZERA	REGNO_U...	AUSTRIA	ITALIA	GERMANIA	FRANCIA	SLOVENIA
225	208	203	190	138	132	104

Average price on weekend of 29-31 July, booked on 25 July - Hotel room for two Product: FOOD AND WINE

SVIZZERA	BENELUX	REGNO_UNITO	AUSTRIA	FRANCIA	GRECIA	SPAGNA	GERMANIA	ITALIA	SLOVENIA
206	176	167	161	155	155	132	130	127	79

Source: ENIT Research Department using Remtene data

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International price comparison - 5ᵗʰ weekend in July

GUEST HOUSES

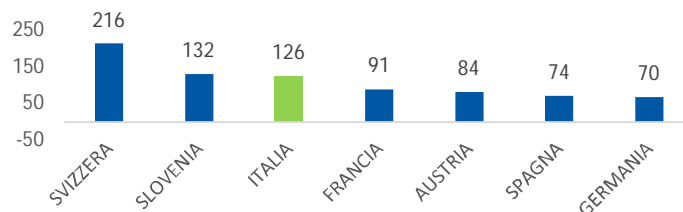
Average price on weekend of 29-31 July, booked on 25 July - Guest house room for two
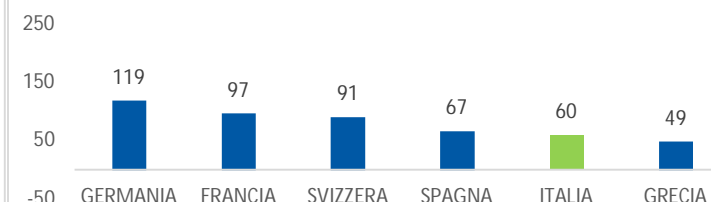Product: ARTISTIC AND CULTURAL…

REGNO …: 175, SVIZZERA: 147, AUSTRIA: 143, BENELUX: 109, GERMANIA: 90, SPAGNA: 90, ITALIA: 89, FRANCIA: 78, SLOVENIA: 65, GRECIA: 57

Average price on weekend of 29-31 July, booked on 25 July - Guest house room for two
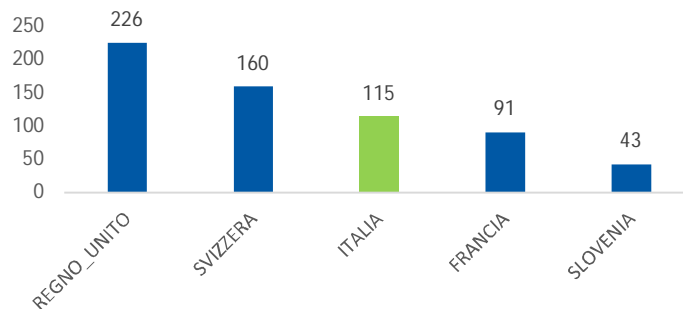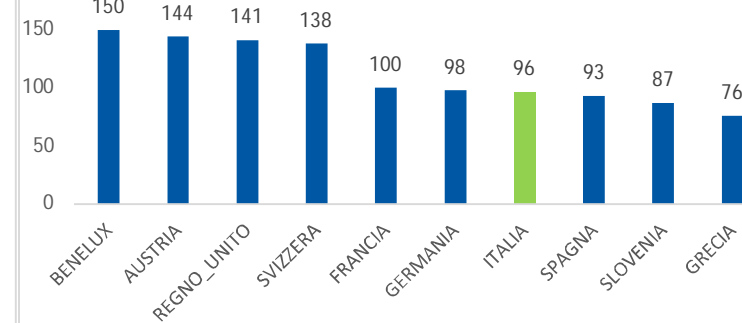Product: MOUNTAINS

SVIZZERA: 216, SLOVENIA: 132, ITALIA: 126, FRANCIA: 91, AUSTRIA: 84, SPAGNA: 74, GERMANIA: 70

Average price on weekend of 29-31 July, booked on 25 July - Guest house room for two
Product: SPA

GERMANIA: 119, FRANCIA: 97, SVIZZERA: 91, SPAGNA: 67, ITALIA: 60, GRECIA: 49

Average price on weekend of 29-31 July, booked on 25 July - Guest house room for two
Product: BEACH

ITALIA: 182, FRANCIA: 146, CROAZIA: 138, REGNO_UNITO: 128, SPAGNA: 120, GRECIA: 94

Average price on weekend of 29-31 July, booked on 25 July - Guest house room for two
Product: LAKE

REGNO_UNITO: 226, SVIZZERA: 160, ITALIA: 115, FRANCIA: 91, SLOVENIA: 43

Average price on weekend of 29-31 July, booked on 25 July - Guest house room for two
Product: FOOD AND WINE

BENELUX: 150, AUSTRIA: 144, REGNO_UNITO: 141, SVIZZERA: 138, FRANCIA: 100, GERMANIA: 98, ITALIA: 96, SPAGNA: 93, SLOVENIA: 87, GRECIA: 76
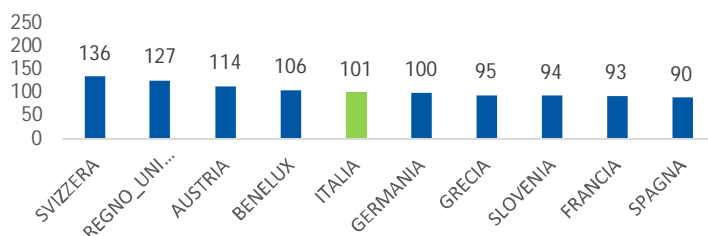
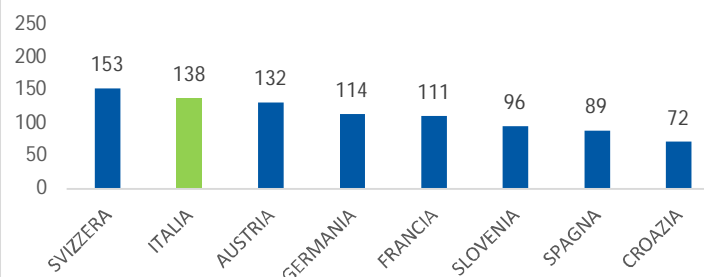Source: ENIT Research Department using Remtene data

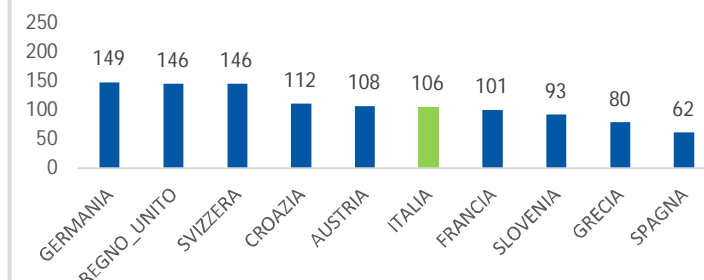# International price comparison - 5th weekend in July

B&Bs

Average price on weekend of 29-31 July, booked on 25 July - B&B room for two
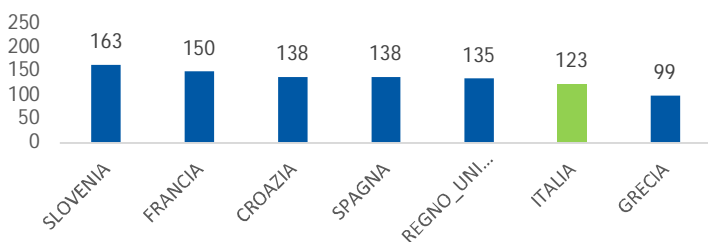### Product: ARTISTIC AND CULTURAL TOWNS AND CITIES

SVIZZERA	REGNO_UNI...	AUSTRIA	BENELUX	ITALIA	GERMANIA	GRECIA	SLOVENIA	FRANCIA	SPAGNA
136	127	114	106	101	100	95	94	93	90

Average price on weekend of 29-31 July, booked on 25 July - B&B room for two
Product: MOUNTAINS

SVIZZERA	ITALIA	AUSTRIA	GERMANIA	FRANCIA	SLOVENIA	SPAGNA	CROAZIA
153	138	132	114	111	96	89	72

Average price on weekend of 29-31 July, booked on 25 July - B&B room for two
Product: SPA

GERMANIA	REGNO_UNITO	SVIZZERA	CROAZIA	AUSTRIA	ITALIA	FRANCIA	SLOVENIA	GRECIA	SPAGNA
149	146	146	112	108	106	101	93	80	62

Average price on weekend of 29-31 July, booked on 25 July - B&B room for two
Product: BEACH

SLOVENIA	FRANCIA	CROAZIA	SPAGNA	REGNO_UNI...	ITALIA	GRECIA
163	150	138	138	135	123	99

Average price on weekend of 29-31 July, booked on 25 July - B&B room for two
Product: LAKE

SVIZZERA	REGNO_UNITO	AUSTRIA	GERMANIA	ITALIA	FRANCIA	SLOVENIA
160	137	136	128	119	97	74

Average price on weekend of 29-31 July, booked on 25 July - B&B room for two
Product: FOOD AND WINE

SVIZZERA	BENELUX	AUSTRIA	REGNO_UNITO	SPAGNA	GERMANIA	GRECIA	ITALIA	FRANCIA	SLOVENIA
151	140	129	128	117	110	104	96	92	82
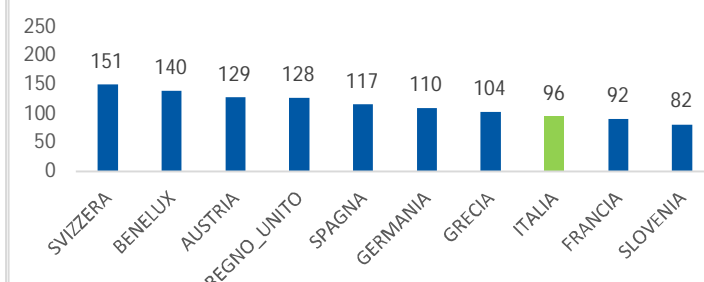
Source: ENIT Research Department using Remtene data

International flight bookings Summer 2022 - compared with 2021

Bookings of flights to Italy by country of origin
Var. % 2022/2021 as of 27/07/2022

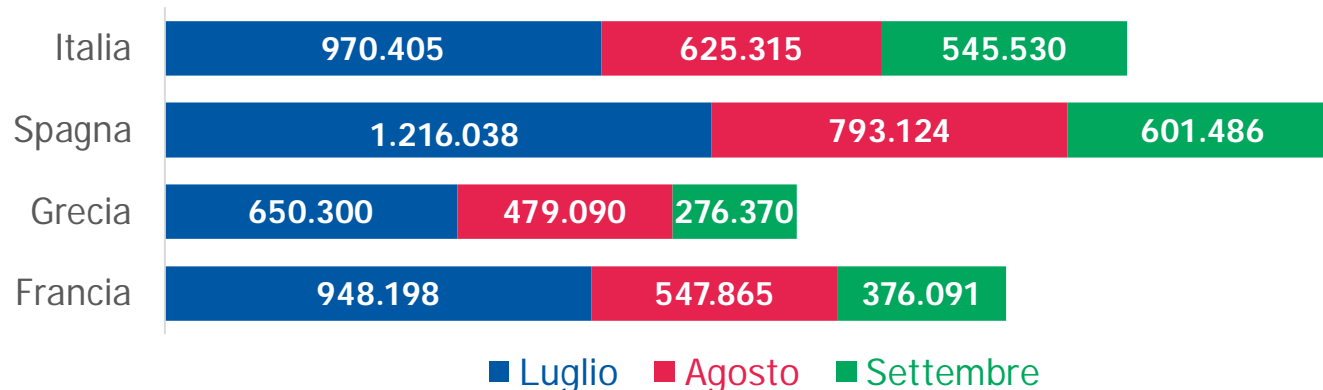|	Luglio	Agosto	Settembre
Germania	38,9	18,9	77,9
USA	256,8	146,2	168,1
UK	228,1	160,2	202,7
Francia	30,1	14,0	62,5
Paesi Bassi	11,3	0,2	64,8
Spagna	115,4	104,4	147,2
Russia	-19,6	8,4	21,9
Cina	174,2	23,3	7,1
Altri	183,3	182,6	259,9
Totale estero in Italia	137,9	103,3	173,2
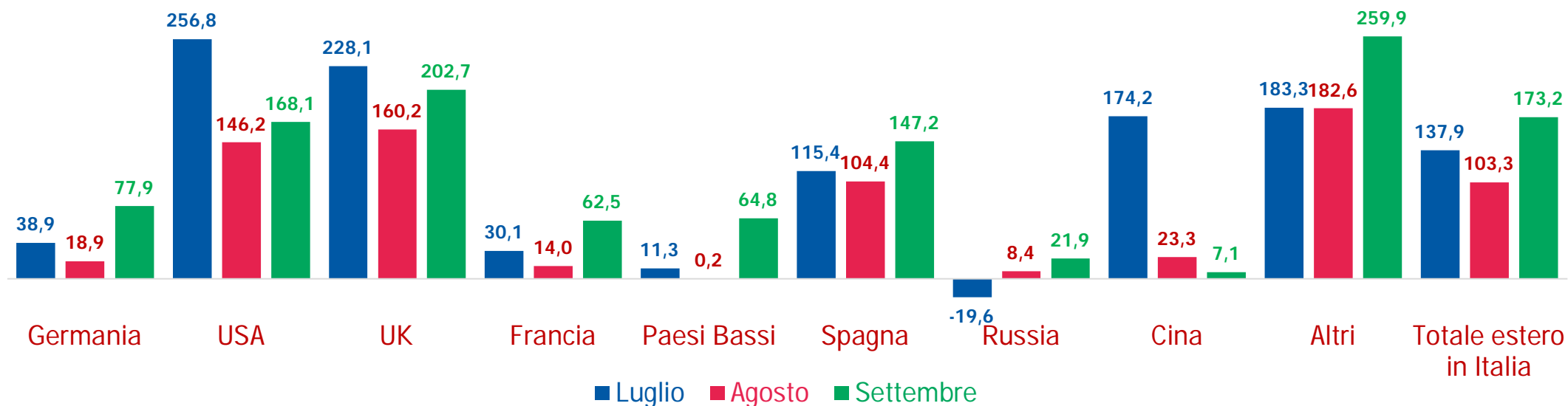
Overall, **bookings for flights from other countries to Italy are up by +137.9% in July. Bookings from the USA (+256.8%) and the UK (+228.1%) are the biggest driving force behind this**. **The increase** compared to 2021 **currently stands at +103.3% in August and +173.2% in September.**

Source: ENIT Research Department using Forward Data – updated on 17/07/2022

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International flight bookings – Italy and competitors Summer 2022

Total international flight bookings, Italy and competitors Var. % 2022/2021, as of 27/07/2022			
Destination	July	August	September
Italy	137.9%	103.3%	173.2%
Spain	73.7%	65.5%	98.6%
Greece	40.4%	27.8%	55.9%
France	145.2%	136.7%	179.7%

All bookings of flights to Italy are up on 2021.

Flight bookings on 27/07/2022
Total international flights to Italy and competitors

	Luglio	Agosto	Settembre
Italia	970.405	625.315	545.530
Spagna	1.216.038	793.124	601.486
Grecia	650.300	479.090	276.370
Francia	948.198	547.865	376.091

■ Luglio ■ Agosto ■ Settembre

Source: ENIT Research Department using Forward Data – updated on 17/07/2022

International flight bookings - Italy and competitors Summer 2022 compared with 2019

Total international flight bookings, Italy and competitors Var. % July 2022/2021 and 2022/2019, as of 27/07/2022		
Destination	Var. % 22/21	Var. % 22/19
Italy	137.9%	-19.3%
Spain	73.7%	-9.0%
Greece	40.4%	+14.0%
France	145.2%	-14.8%

Total flight bookings, Italy and competitors Var. % August 2022/2021 - 2022/2019, as of 27/07/2022		
Destination	Var. % 22/21	Var. % 22/19
Italy	103.3%	-24.7%
Spain	65.5%	-17.4%
Greece	27.8%	+3.4%
France	136.7%	-23.9%

Source: ENIT Research Department using Forward Data – updated on 17/07/2022

ENIT – Italian National Tourist Board
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