

ENIT BULLETIN

In-depth analysis of trends in tourism

July W3

By the

Research Department

ENIT - ITALIAN NATIONAL TOURIST BOARD



Position of Italy in terms of interest in international travel

Destination by volume of interest in travel searches - Flight + accommodation						
	Area		Country		City	
1	Southern Europe	100	USA	100	London	100
2	Western Europe	58	Spain	94	Paris	70
3	Western Asia	47	Italy	72	Dubai	62
4	North America	45	United Kingdom	72	New York	50
5	Northern Europe	42	France	61	Amsterdam	43
6	South East Asia	30	Turkey	53	Barcelona	40
7	South Asia	23	Germany	42	Lisbon	40
8	Central America	16	Greece	41	Istanbul	38
9	North Africa	16	India	39	Rome	35
10	Eastern Europe	15	UAE	38	Denpasar	34
18					Milan	19

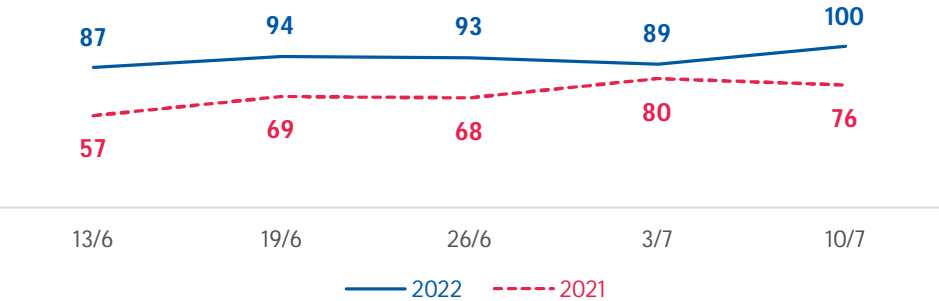
Destinations with the fastest growth in the world in terms of interest in travel

75%
Turkey

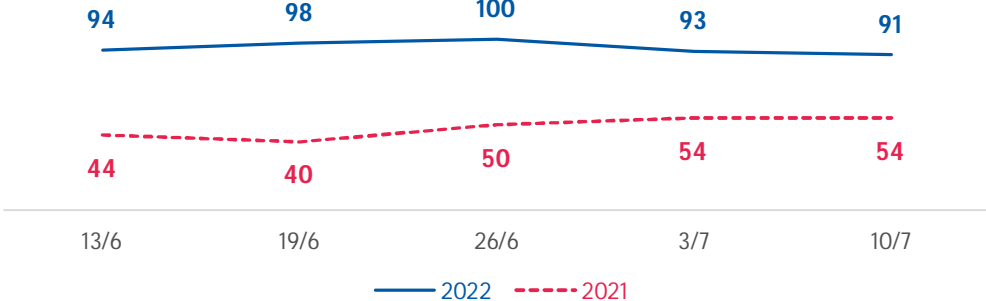
Source: ENIT Research Department using Google Destination Insights (for the period from 13/06/22 to 13/07/22, as recorded on 20/07/22) – All data is indexed

Interest among international tourists in trips to Italy

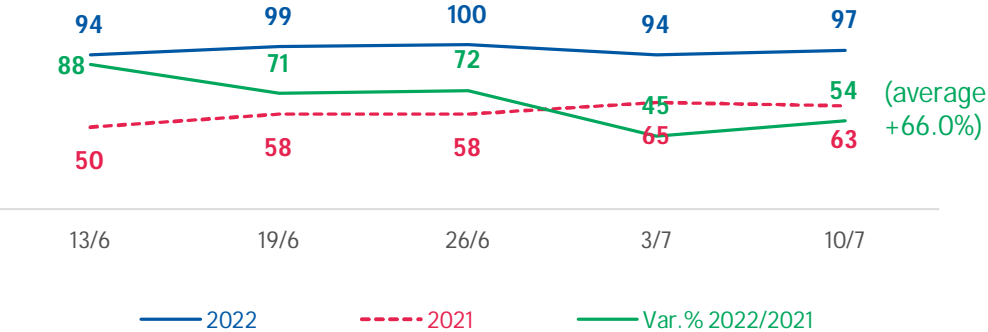
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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



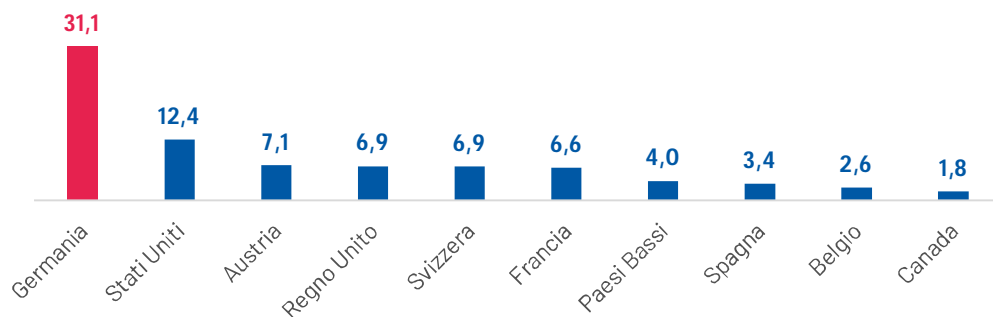
For the period analysed, the search data for travel to Italy shows that interest peaked on 26 June.

Comparison with the same dates from 2021 shows that the greatest variation (in %) was on 13 June (+88%).

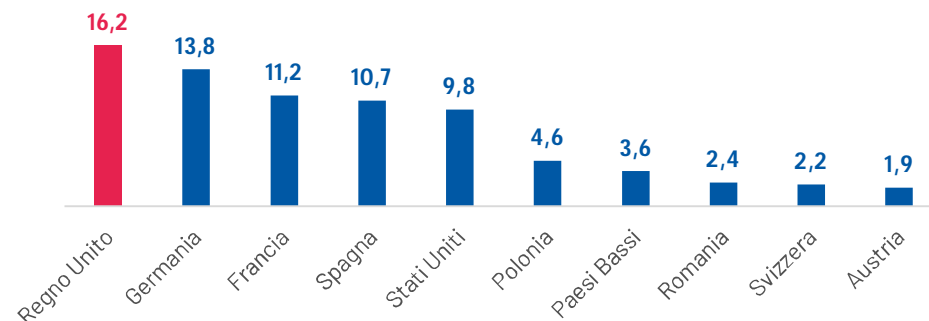
Source: ENIT Research Department using Google Destination Insights (for the period from 13/06/22 to 13/07/22, as recorded on 20/07/22) – All data is indexed

The main countries interested in Italy

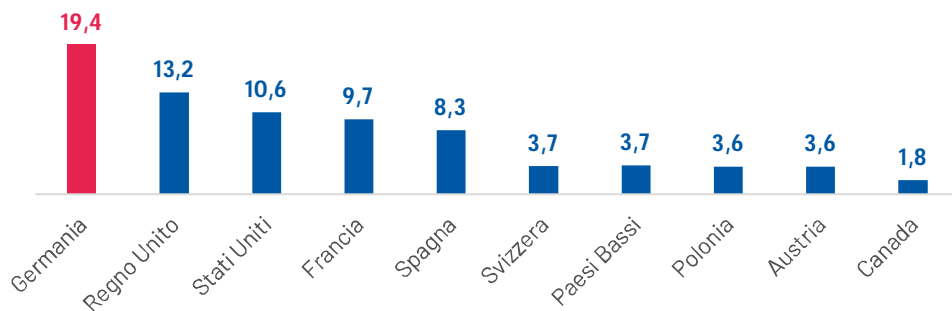
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



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



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

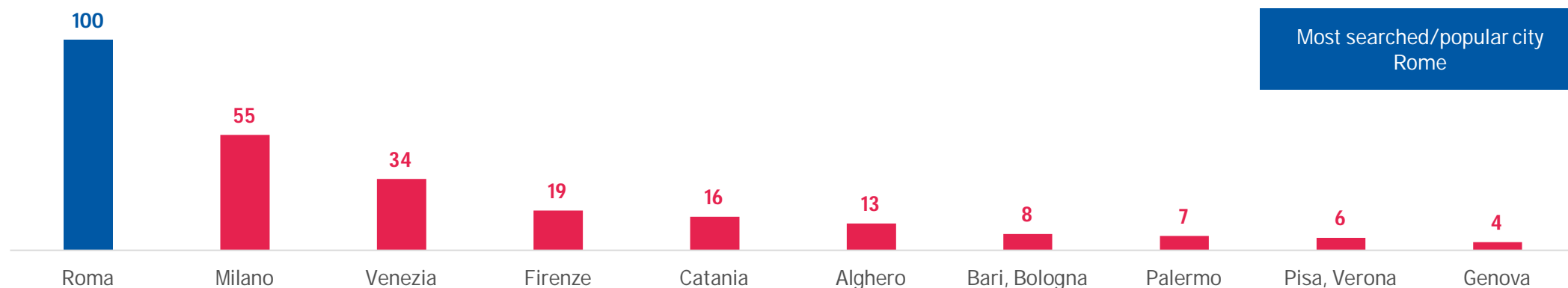


Country with greatest interest in incoming travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 13/06/22 to 13/07/22, as recorded on 20/07/22) – All data is indexed

The main destinations of international tourists

Volume of interest
Main destination cities: Flight + accommodation



Growth for the main destinations, based on increased interest in consumer searches compared to a month ago

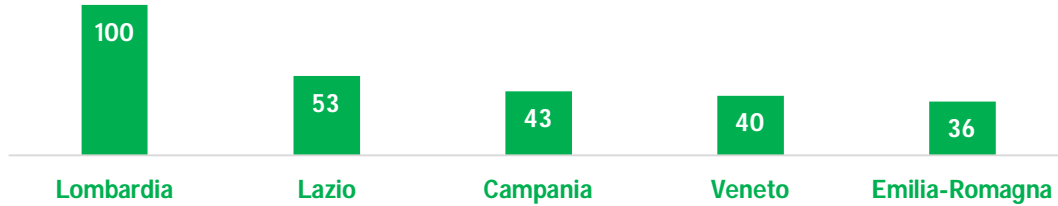


10% to 25%
Portofino

Source: ENIT Research Department using Google Destination Insights (for the period from 13/06/22 to 13/07/22, as recorded on 20/07/22) – All data is indexed

Interest among Italian tourists in travel in Italy

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



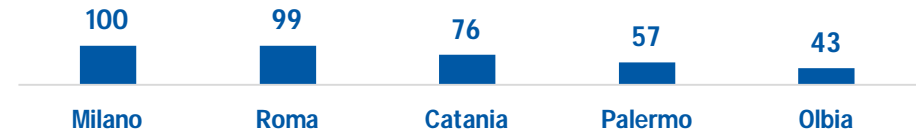
TOP 5 destination regions
in terms of volume of interest – Flight + accommodation



Growth for the main destinations, based on increased interest in consumer searches compared to a month ago

25% to 50%	10% to 25%
Vieste, Sant'Angelo	Olbia, Rimini, Cervia, Cesenatico, Igea Marina, Cattolica, Pescara, Forio, Lignano Sabbiadoro, San Benedetto del Tronto, Ischia, Senigallia, etc.

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



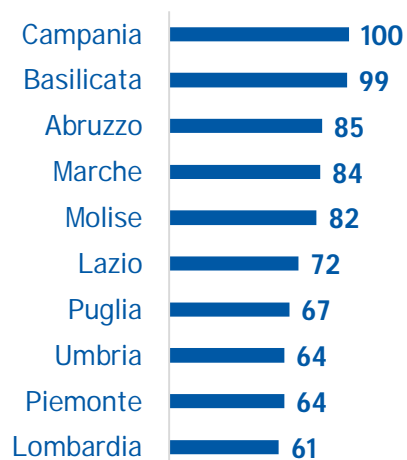
% interest in outgoing travel – Flight + accommodation...



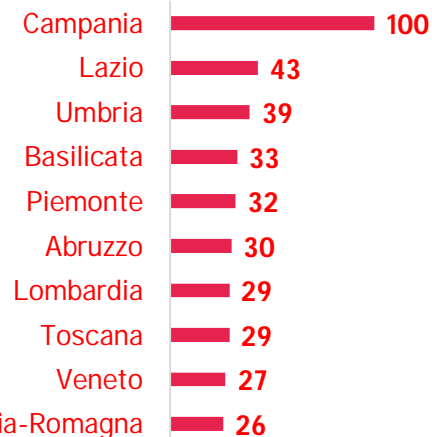
Source: ENIT Research Department using Google Destination Insights (for the period from 13/06/22 to 13/07/22, as recorded on 20/07/22) – All data is indexed

Searches for Italy – Holidays

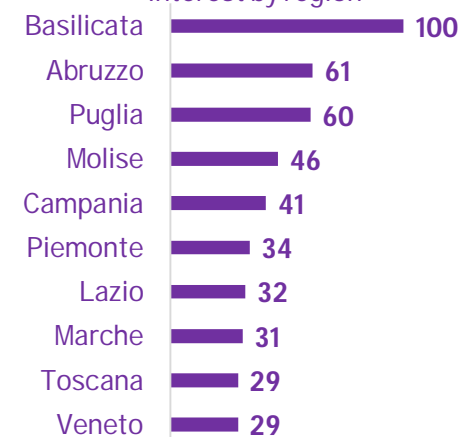
Holiday searches
Travel category: interest by region



Holiday searches
Travel category: tourist destinations
Interest by region



Holiday searches
Travel category: hotels and accommodation
Interest by region



Among the correlated subjects for holidays – travel/tourist destinations

Increasing

Subject: summer holidays +170%; low-cost airline +110%; last-minute trips +80%
Place/municipality/city: Casal Velino +350%; Maiori +200%; Ascea +120%; Agropoli +100%; Palinuro +80%
Month: February +250%; October +80%; September +70%
Accommodation facility: Bungalow +80%

Most searched

Subject: holiday, home, last-minute trips
Accommodation facility: holiday home
Place/municipality: Palinuro, Cilento, Paestum, Agropoli
Month: August, September, October

Source: ENIT Research Department using Google Trends data on 20/07/2022 – Last 30 days

Accommodation bookings through OTAs Summer 2022 - compared with 2021

% occupancy of accommodation
in OTA channels on 20/07/2022

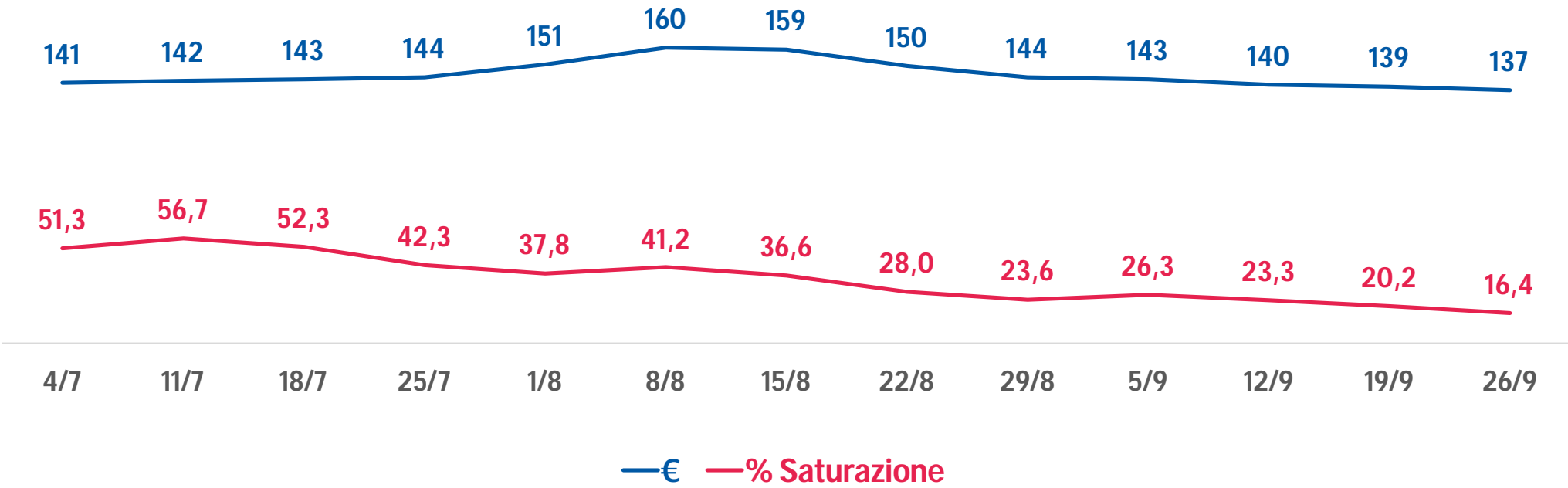
Product	July		August		September	
	2022	2021	2022	2021	2022	2021
Total for Italy	50.5	30.0	34.4	42.8	22.4	28.4
Mountains	48.9	29.1	43.5	46.9	21.7	22.3
Art and culture	49.8	26.3	29.1	36.4	23.5	27.2
Beach	56.7	39.1	44.5	57.2	23.5	33.4
Lake	63.0	42.7	53.6	61.7	31.6	40.6
Spa	44.0	30.1	33.4	50.4	18.8	30.5
Other	36.7	20.7	26.7	34.3	14.4	19.9

Bookings for accommodation facilities through Online Travel Agencies currently stand at 50.5% of the capacity for the month of July, which is 20.5 percentage points more than last year. **They are above the national average in the fields of lakes (63.0%) and beach resorts (56.7%).** All categories have made up ground on 2021, especially artistic and cultural towns and cities (+23.5) and lakes (+20.3).

At present, bookings cover **34.4% of the capacity for August**. The highest figure is for lakes (53.6%). The figures for beach resorts (44.5%) and the mountains (43.5%) are also above the national average. **The occupancy rate for the month of September stands at 22.4%.** Leading the drive on this front are bookings for lakes (31.6%), artistic and cultural towns and cities (23.5%) and beach resorts (23.5%).

Accommodation bookings through OTAs Summer 2022

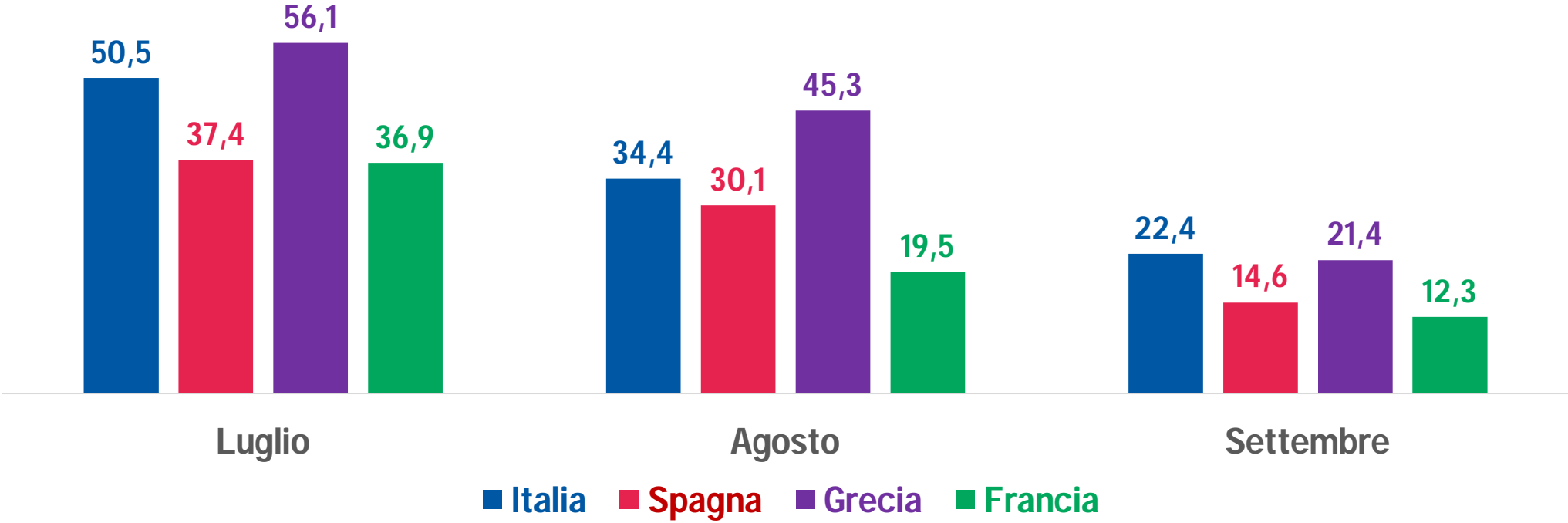
Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 20/07/2022 - Weekly data



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs - Italy and competitors Summer 2022

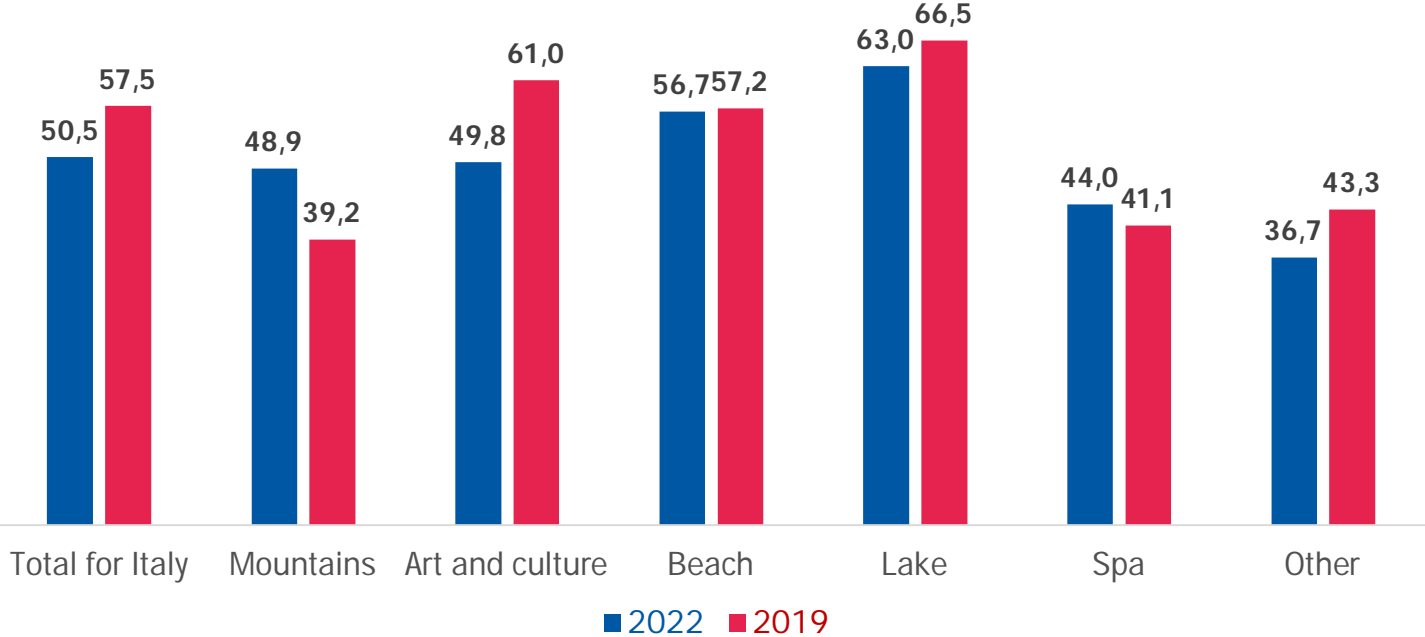
% occupancy of accommodation
in OTA channels on 20/07/2022 - Italy and competitors



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 20/07/2022

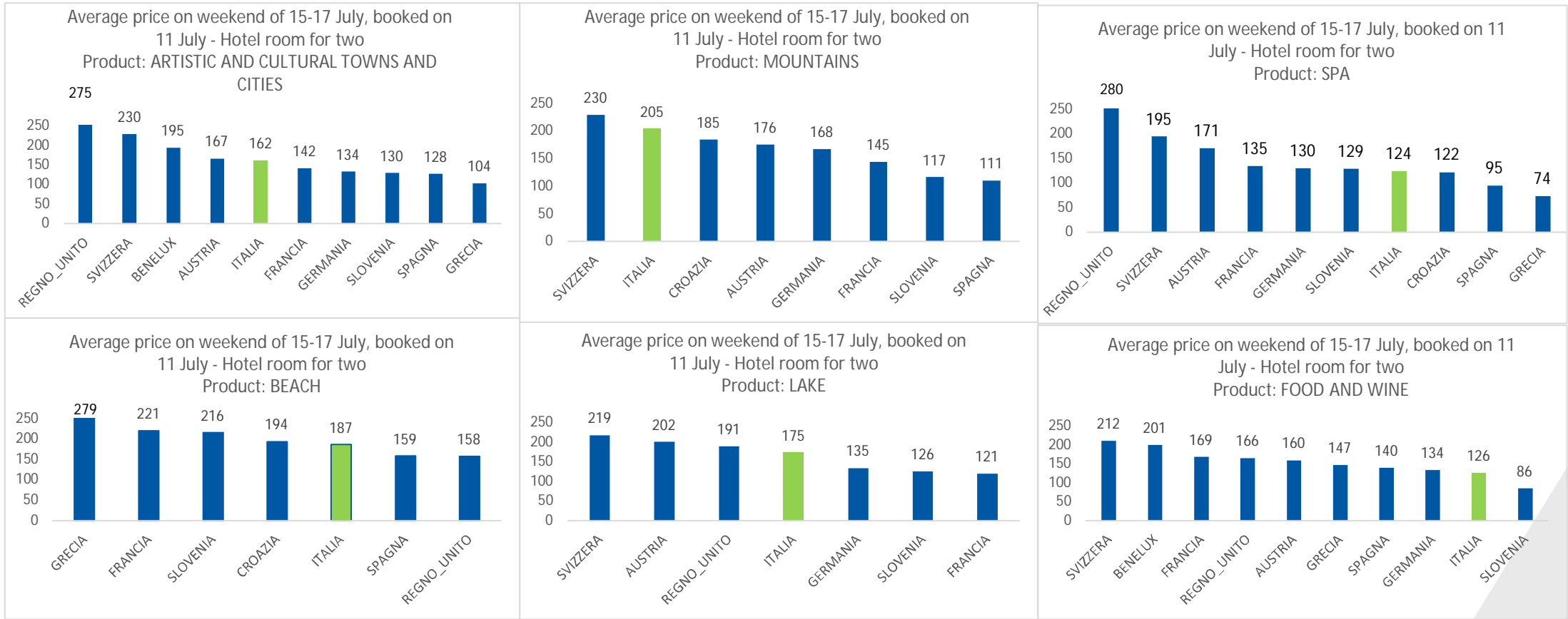


At present, overall bookings for July are down by 7 percentage points on 2019. Two categories have made up ground: the mountains and spas (+9.7 and +2.9 respectively).

Source: ENIT Research Department using The Data Appeal Company data

International price comparison - 3rd weekend in July

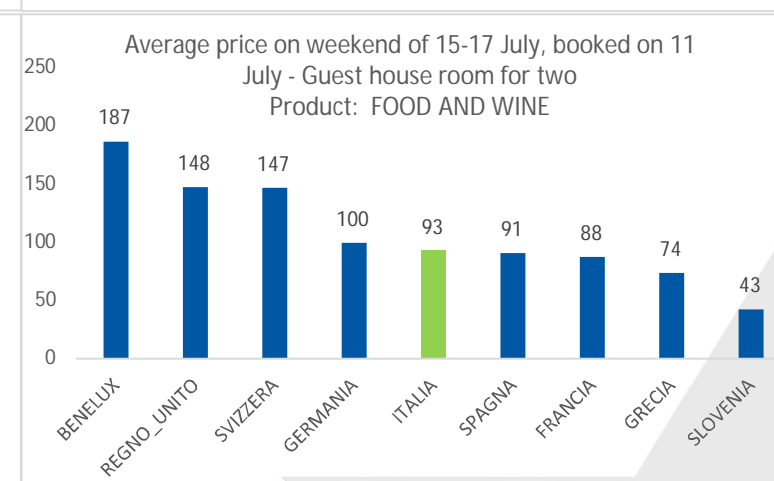
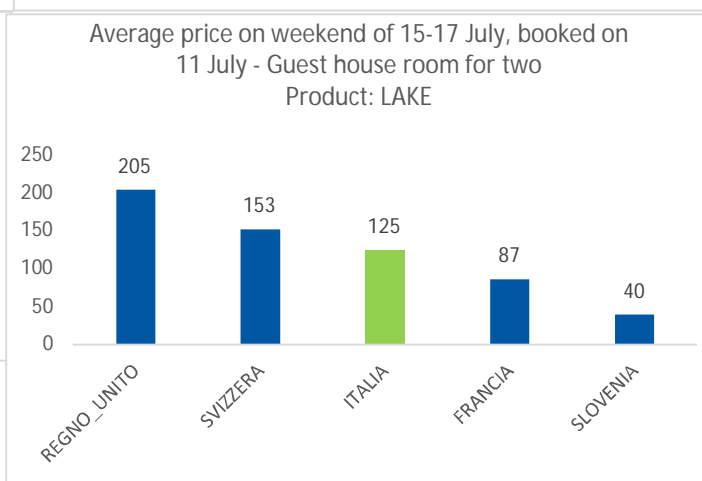
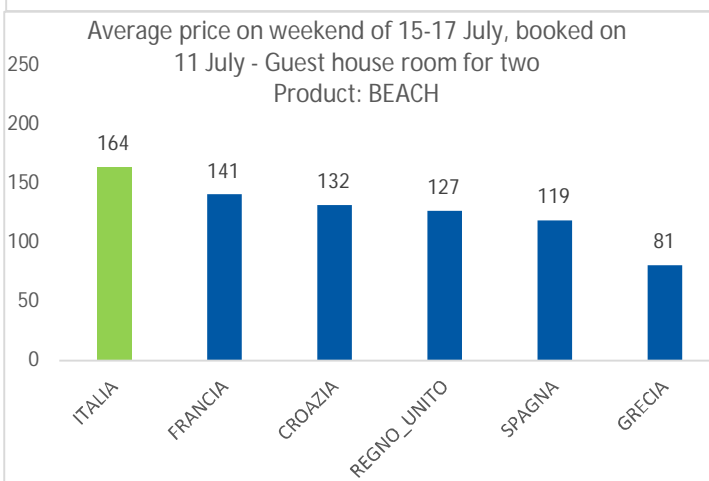
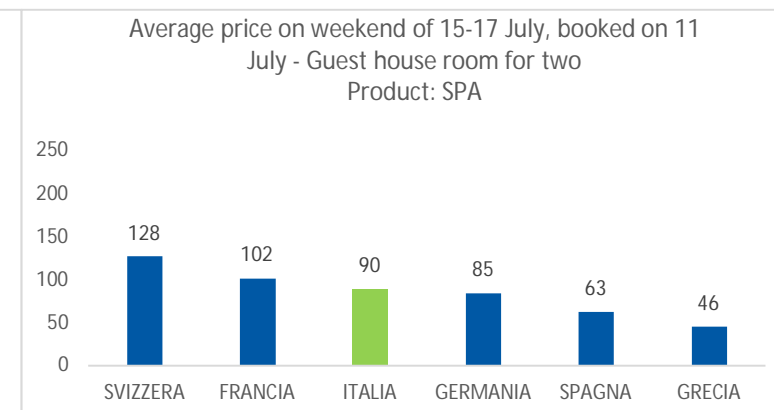
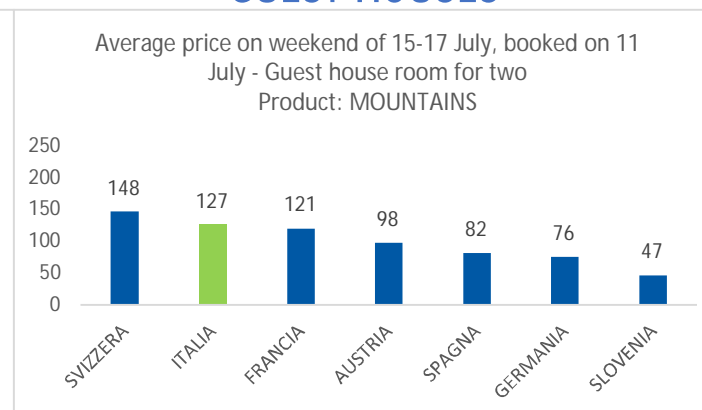
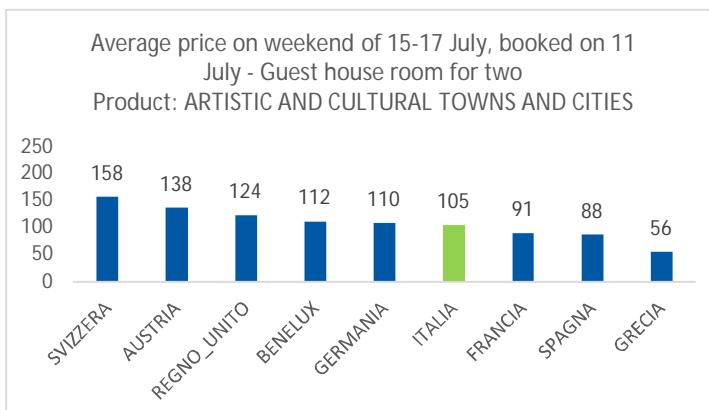
HOTELS



Source: ENIT Research Department using Remtene data

International price comparison - 3rd weekend in July

GUEST HOUSES

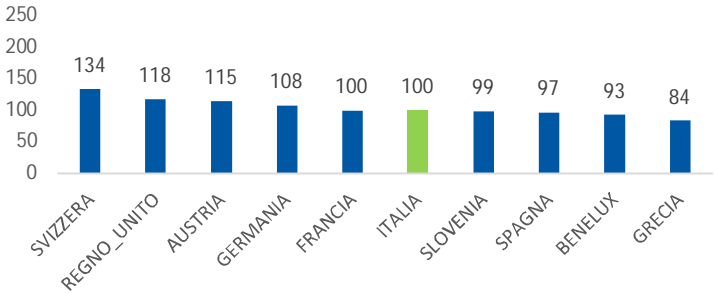


Source: ENIT Research Department using Remtene data

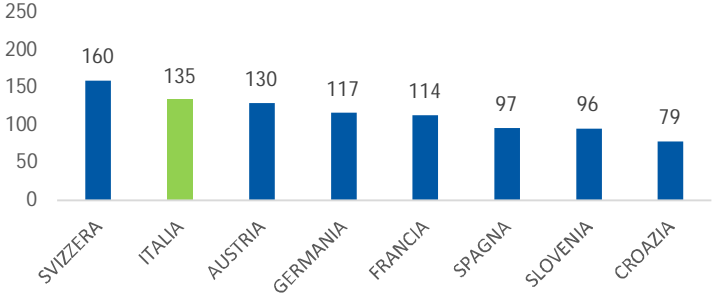
International price comparison - 3rd weekend in July

B&Bs

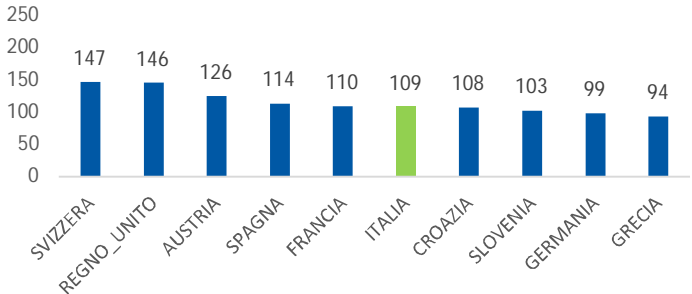
Average price on weekend of 15-17 July, booked on 11 July - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



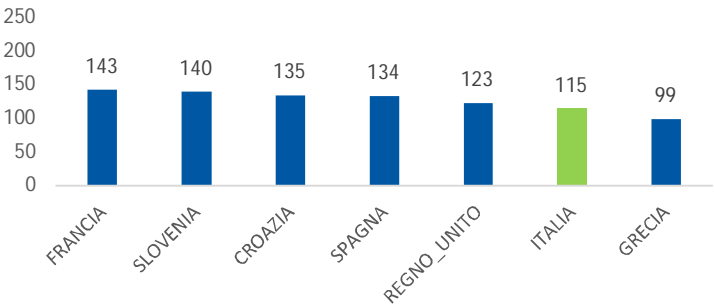
Average price on weekend of 15-17 July, booked on 11 July - B&B room for two
Product: MOUNTAINS



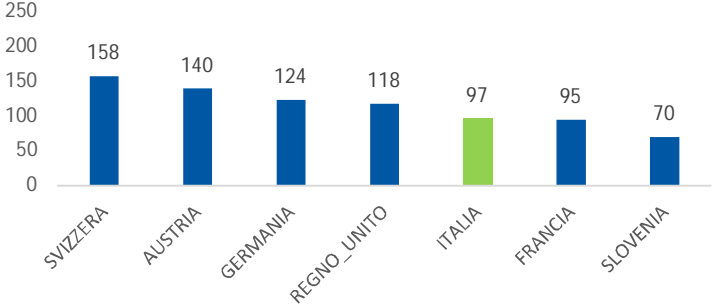
Average price on weekend of 15-17 July, booked on 11 July - B&B room for two
Product: SPA



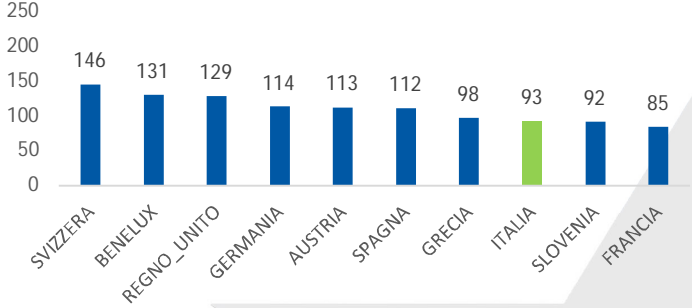
Average price on weekend of 15-17 July, booked on 11 July - B&B room for two
Product: BEACH



Average price on weekend of 15-17 July, booked on 11 July - B&B room for two
Product: LAKE



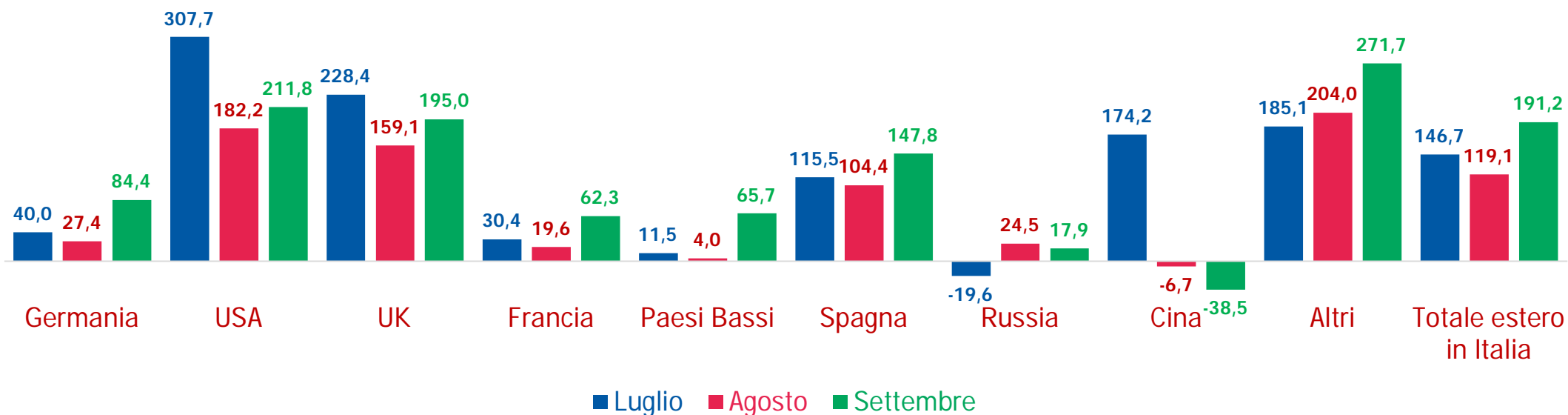
Average price on weekend of 15-17 July, booked on 11 July - B&B room for two
Product: FOOD AND WINE



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 20/07/2022



Overall, **bookings for flights from other countries to Italy are up by 146.7% in July. Bookings from the USA (+307.7%) are the biggest driving force behind this. The increase compared to 2021 currently stands at 119.1% in August and 191.2% in September.**

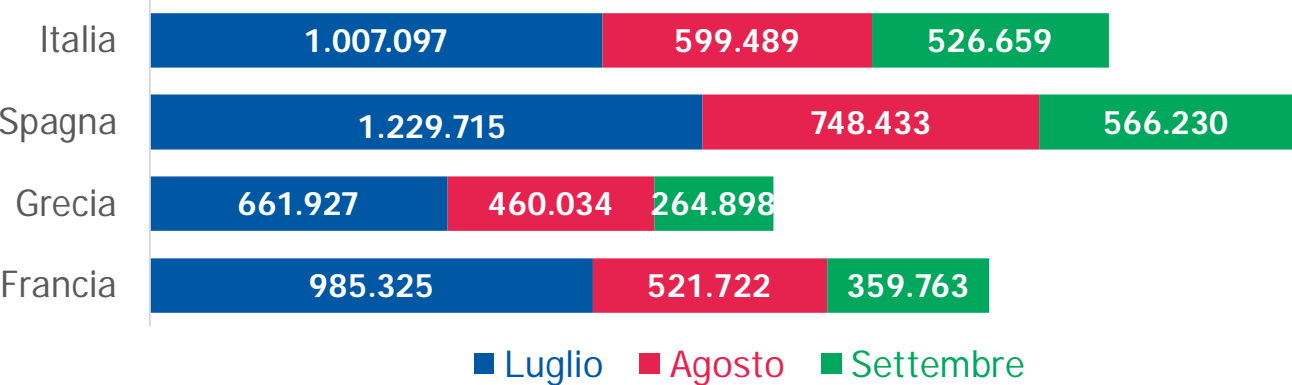
Source: ENIT Research Department using Forward Data – updated on 10/07/2022

International flight bookings Summer 2022

**Total international flight bookings, Italy and competitors
Var. % 2022/2021, as of 20/07/2022**

Destination	July	August	September
Italy	146.7%	119.1%	191.2%
Spain	75.6%	68.8%	99.8%
Greece	42.9%	34.0%	62.7%
France	154.4%	157.1%	198.4%

**Flight bookings on 20/07/2022
Total international flights to Italy and competitors**



All bookings of flights to Italy are up on 2021.

Source: ENIT Research Department using Forward Data – updated on 10/07/2022

International flight bookings Summer 2022 compared with 2019

Total international flight bookings, Italy and competitors Var. % July 2022/2021 and 2022/2019, as of 20/07/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	146.7%	-16.2%
Spain	75.6%	-8.0%
Greece	42.9%	+16.0%
France	154.4%	-11.4%

Total flight bookings, Italy and competitors Var. % August 2022/2021 - 2022/2019, as of 20/07/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	119.1%	-22.1%
Spain	68.8%	-16.1%
Greece	34.0%	+4.7%
France	157.1%	-20.5%

Source: ENIT Research Department using Forward Data – updated on 10/07/2022



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