

ENIT BULLETIN

In-depth analysis of trends in tourism
July W2

By the
Research Department
ENIT - ITALIAN NATIONAL TOURIST BOARD

Searches on Google in other countries for 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	57	Spain	99	Paris	71
3	Western Asia	46	Italy	76	Dubai	64
4	North America	43	United Kingdom	73	New York	50
5	Northern Europe	41	France	63	Amsterdam	43
6	South East Asia	29	Turkey	54	Barcelona	42
7	South Asia	22	Greece	43	Lisbon	40
8	Central America	16	Germany	42	Istanbul	39
9	North Africa	16	UAE	40	Rome	36
10	Caribbean	14	India	38	Denpasar	33
18					Milan	20

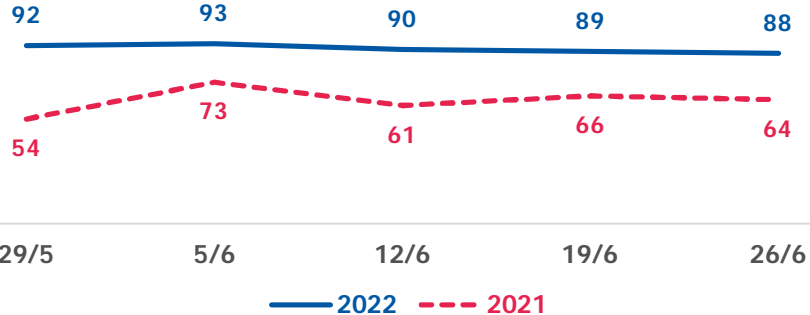
Destinations with the fastest growth in the world in terms of interest in travel

75%
Greece

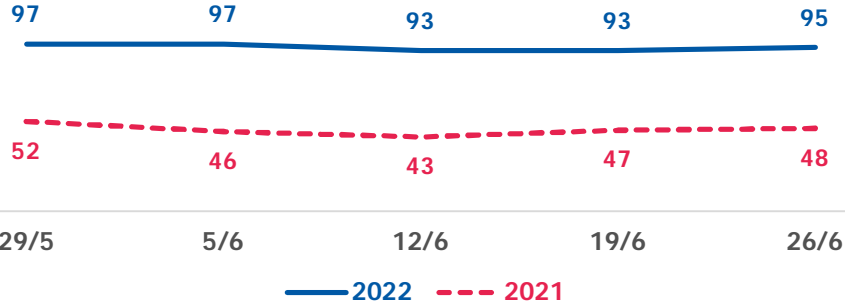
Source: ENIT Research Department using Google Destination Insights (for the period from 29/05/22 to 30/06/22, as recorded on 07/07/22) – All data is indexed

Searches on Google in other countries for travel to Italy

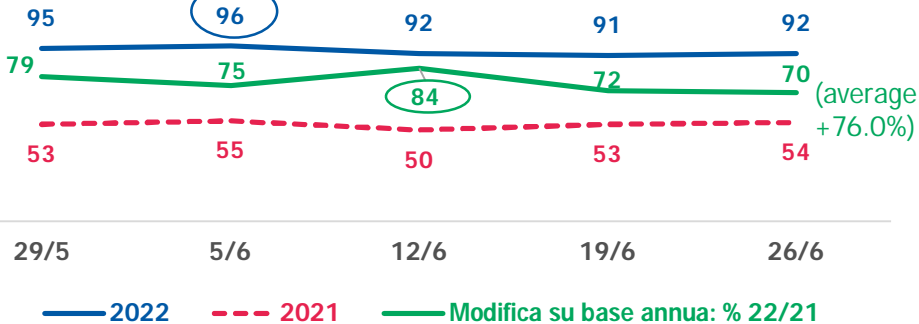
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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



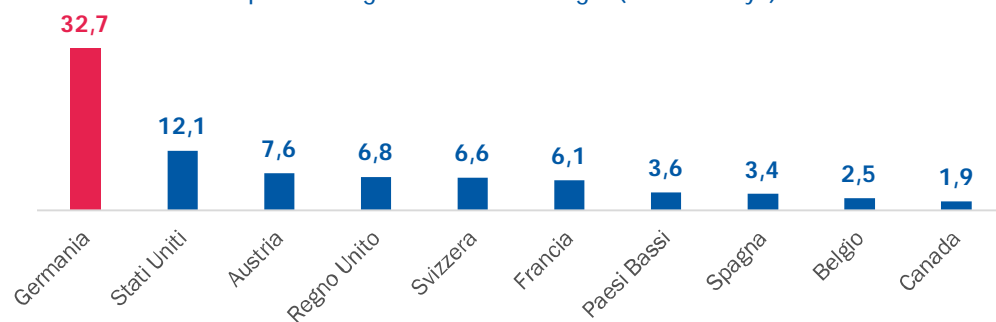
For the period analysed, the search data for travel to Italy shows that interest peaked on 5 June.

Comparison with the same dates from 2021 shows that the greatest variation (in %) was on 12 June (+84%).

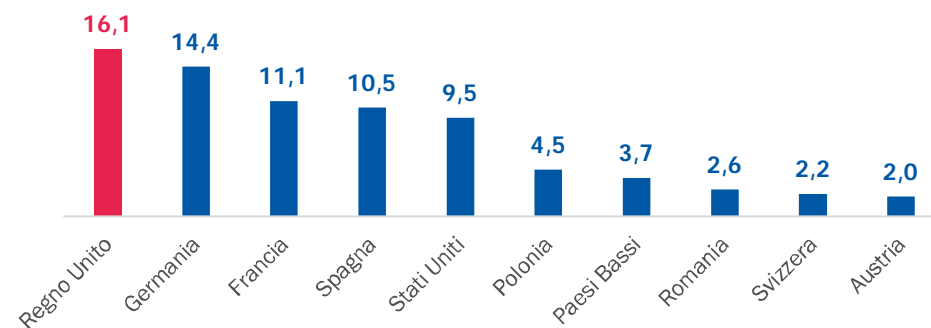
Source: ENIT Research Department using Google Destination Insights (for the period from 29/05/22 to 30/06/22, as recorded on 07/07/22) – All data is indexed

Searches on Google in other countries for travel to Italy

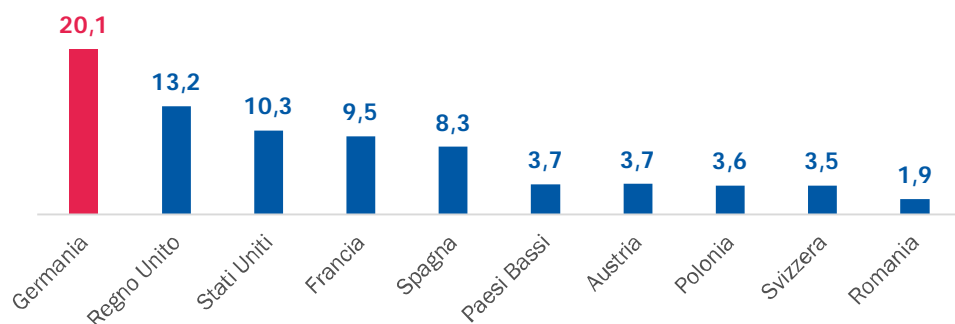
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

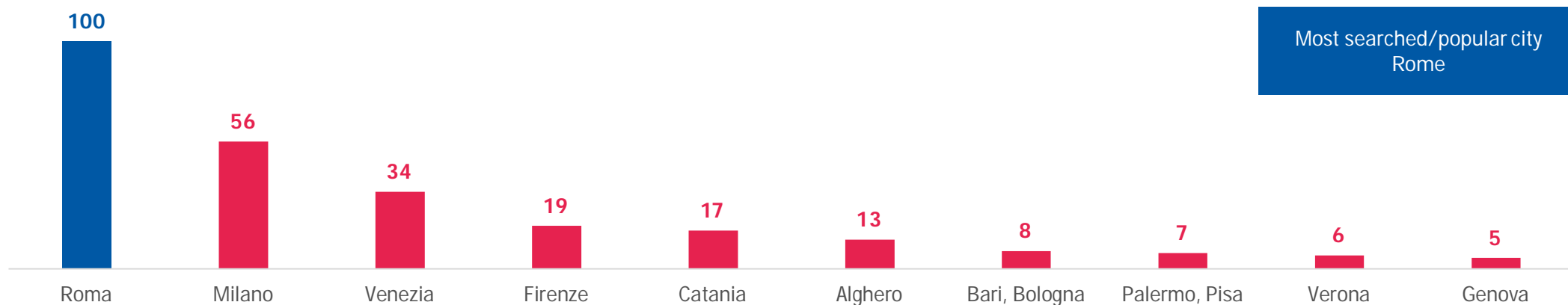


Country with greatest interest in incoming travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 29/05/22 to 30/06/22, as recorded on 07/07/22) – All data is indexed

Searches on Google in other countries for travel to Italy

Volume of interest
Main destination cities: Flight + accommodation



Most searched/popular city
Rome

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



50% to 75%
Jesolo

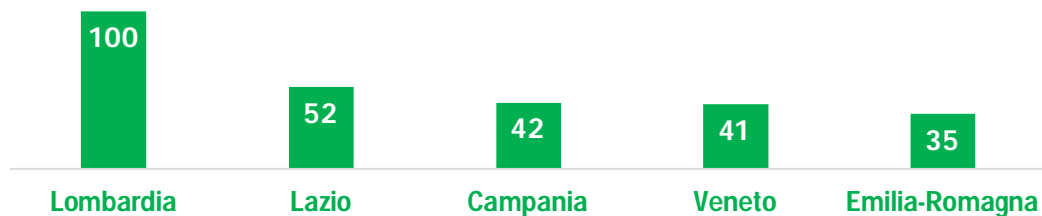
25% to 50%
Rimini, Bibione, Lido di Jesolo, Caorle, Lignano Sabbiadoro, Peschiera del Garda, Torri del Benaco, Portofino, etc.

10% to 25%
Olbia, Lamezia Terme, Bolzano, Grado, Pescara, Porto Cervo, etc.

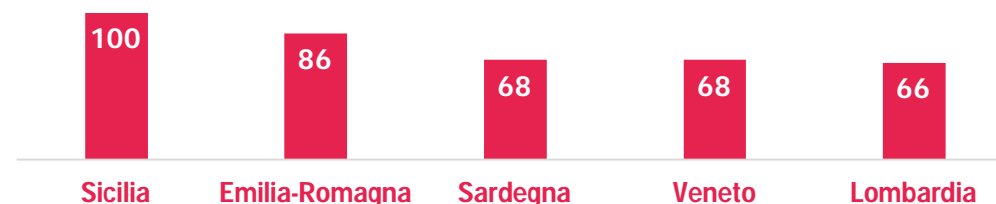
Source: ENIT Research Department using Google Destination Insights (for the period from 29/05/22 to 30/06/22, as recorded on 07/07/22) – All data is indexed

Searches on Google in Italy for 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



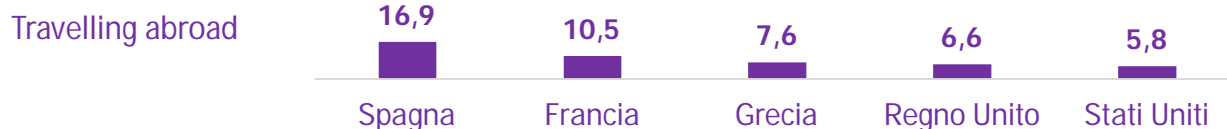
Growth for the main destinations, based on increased interest in consumer searches compared to a month ago

More than 75%	25% to 50%	10% to 25%
Sant'Angelo	Rimini, Riccione, Cervia, Cesenatico, Bibione, Forio, Lignano Sabbiadoro, San Benedetto del Tronto, Ischia, Senigallia, Castione della Pescaia, Capo Vaticano, etc.	Olbia, Alghero, Brindisi, Lamezia Terme, Pantelleria, Reggio Calabria, Pescara, Sorrento, Ancona, etc.
Lido di Jesolo, Igea Marina, Cattolica, Vieste, Caorle, Chioggia, Jesolo, Misano Adriatico, etc.		

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



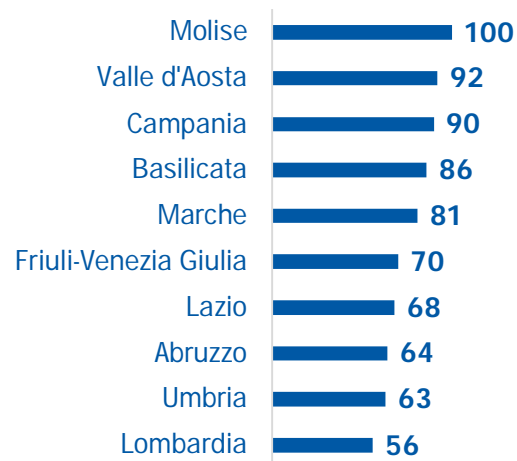
% interest in outgoing travel – Flight + accommodation
Top 5 foreign destination countries (last 30 days)



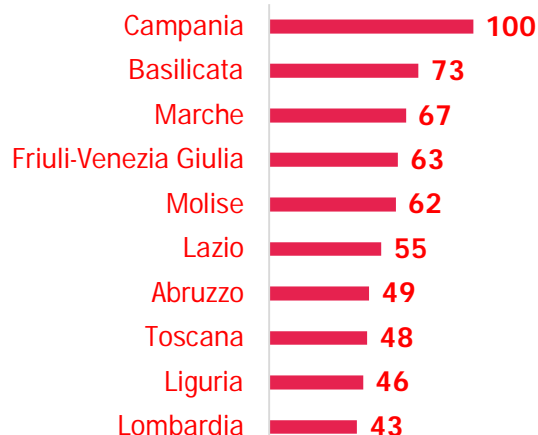
Source: ENIT Research Department using Google Destination Insights (for the period from 29/05/22 to 30/06/22, as recorded on 07/07/22) – All data is indexed

Google searches for Italy – Holidays

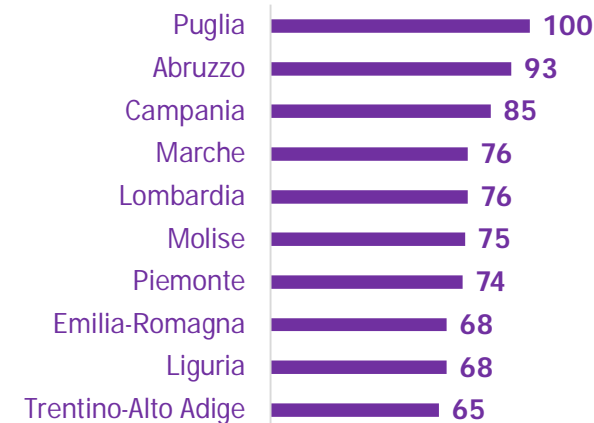
Holiday searches
Travel category: interest by region



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: cruise upsurge; low-cost airline + 150%; last-minute trips + 60%
Place/municipality/region/city: Pisciotta upsurge; Sapri + 80%; Paestum + 80%
Month: October + 250%
In other countries: Gran Canaria + 350%; Madagascar + 120%

Most searched

Subject: holiday, home, low-cost airline
Accommodation facility: holiday home
Place/region/municipality: Cilento, Paestum, Sapri, Pisciotta
Month: August, October
In other countries: Maldives, Gran Canaria, Madagascar

Accommodation bookings through OTAs

Summer 2022 - compared with 2021

% occupancy of accommodation
in OTA channels on 06/07/2022

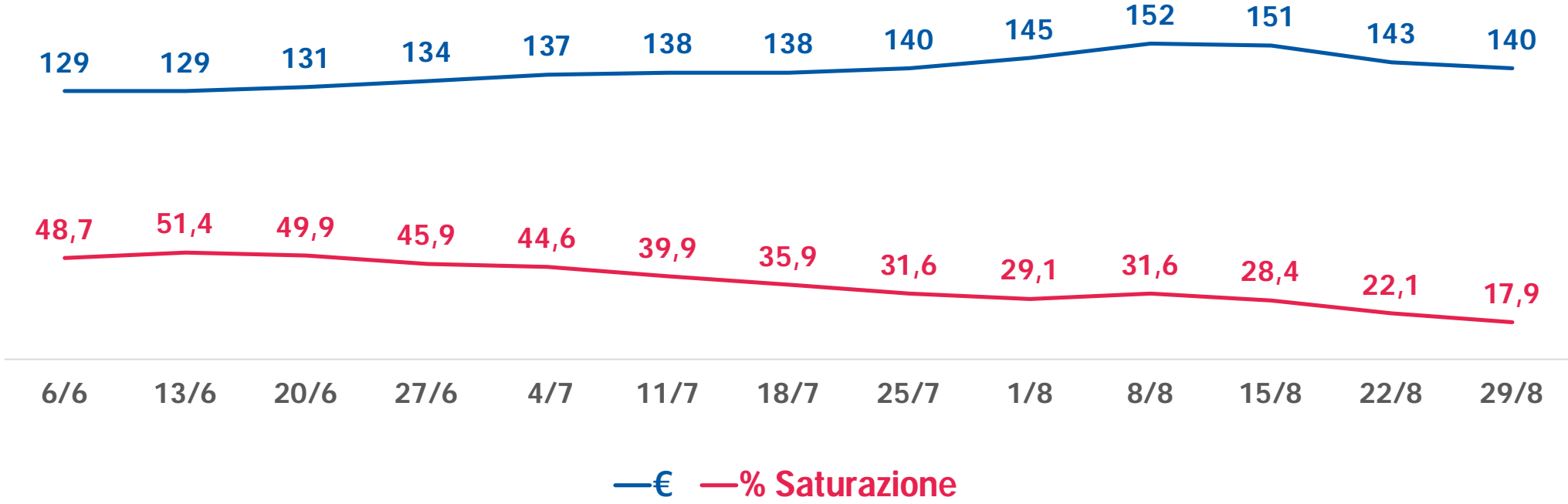
Product	June		July		August	
	2022	2021	2022	2021	2022	2021
Total for Italy	50.5	24.0	39.0	29.4	26.7	42.2
Mountains	37.6	20.5	39.9	29.0	36.5	46.6
Art and culture	55.7	23.2	37.6	26.3	22.2	36.3
Beach	47.5	27.8	47.0	38.8	36.1	57.8
Lake	58.2	28.8	53.1	42.4	45.0	61.3
Spa	40.0	24.7	35.5	30.2	26.8	50.8
Other	38.9	18.4	25.4	20.8	20.6	34.3

Bookings for accommodation facilities through Online Travel Agencies reached 50.5% of the capacity for the month of June, which is approximately 26.5 percentage points more than last year. They are above the national average in the fields of lakes (58.2%) and culture (55.7%). All categories have made up ground on 2021, especially artistic and cultural towns and cities (+32.5) and lakes (+29.4).

At present, bookings cover 39.0% of the capacity for July. The highest figure and biggest increase concern lakes (53.1% and +10.7%). The figures for beach resorts (47.0%) and the mountains (39.9%) are also above the national average. The occupancy rate for the month of August stands at 26.7%. Leading the drive on this front are bookings for lakes (45.0%), the mountains (36.5%) and beach resorts (36.1%).

Accommodation bookings through OTAs Summer 2022

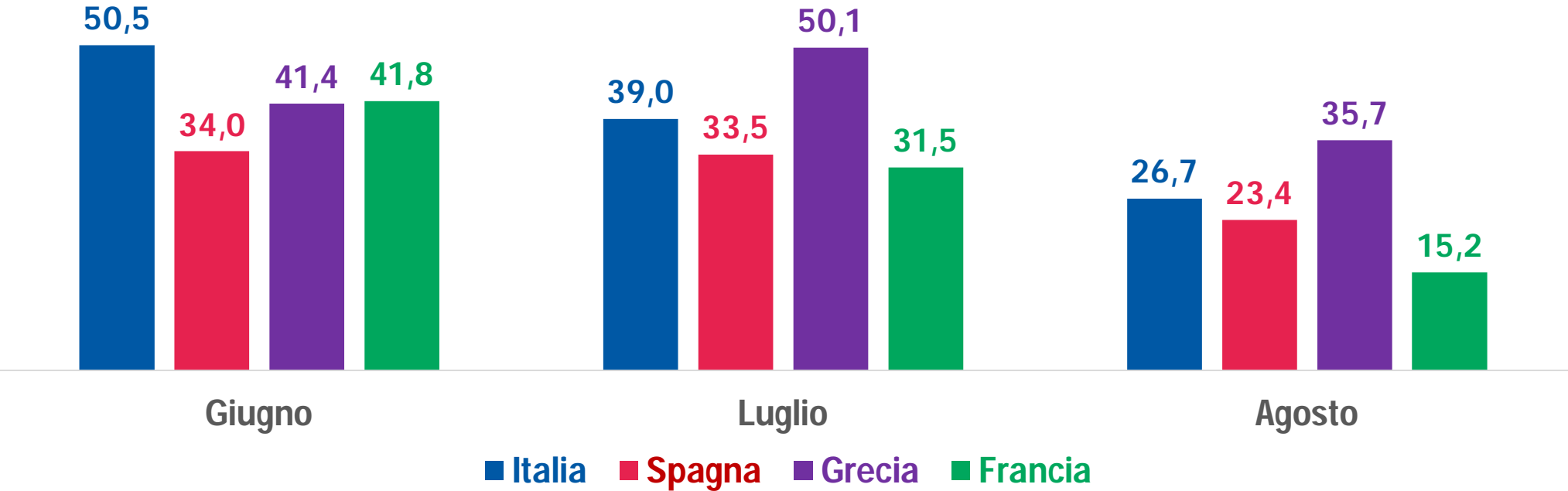
Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 06/07/2022 - Weekly data



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs - Italy and competitors Summer 2022

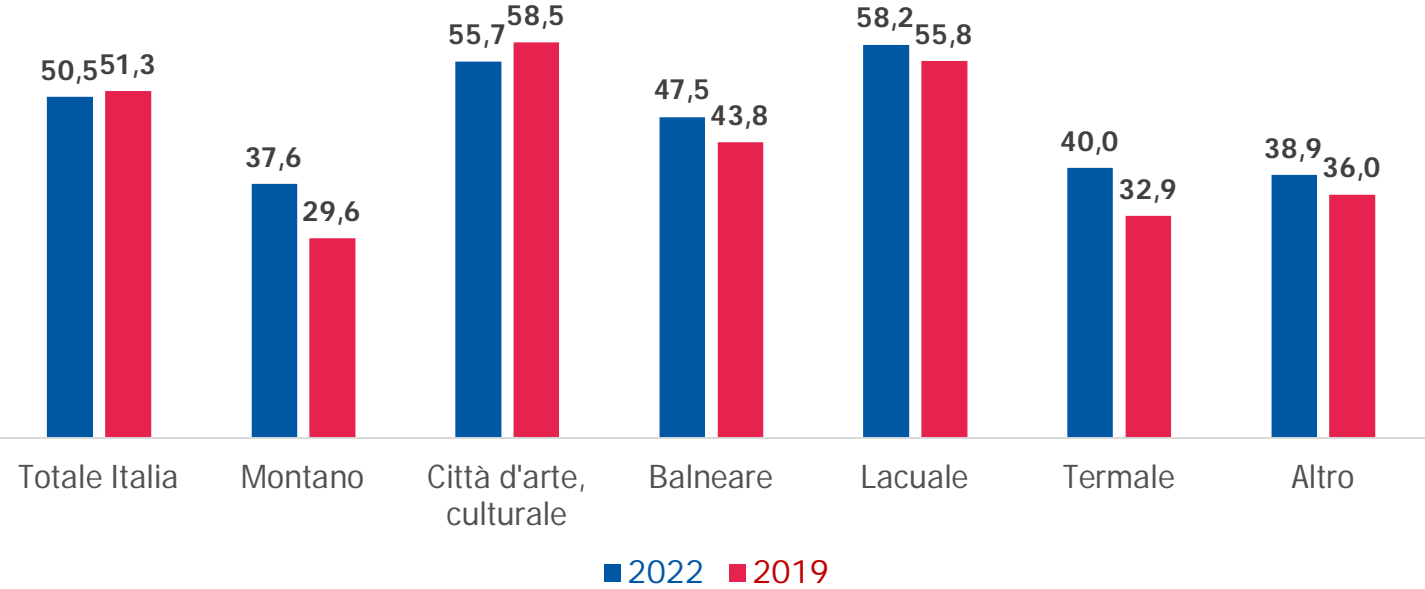
% occupancy of accommodation
in OTA channels on 06/07/2022 - Italy and competitors



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs June 2022 - compared with 2019

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

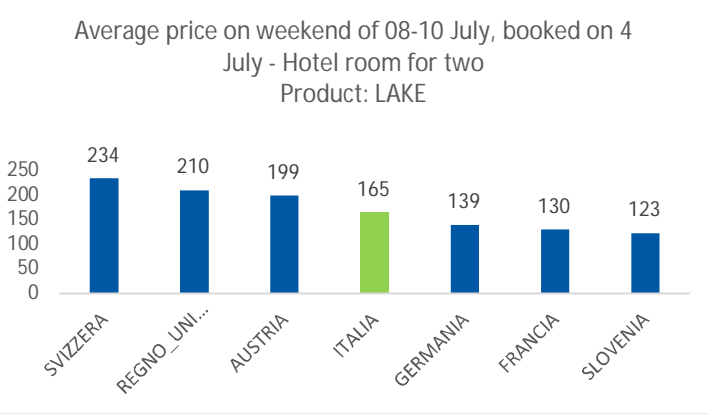
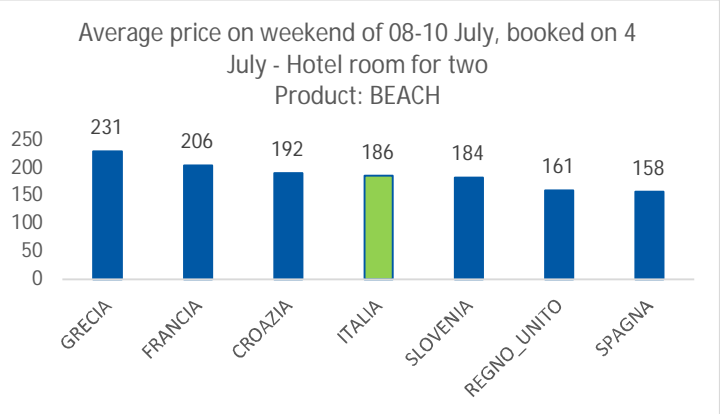
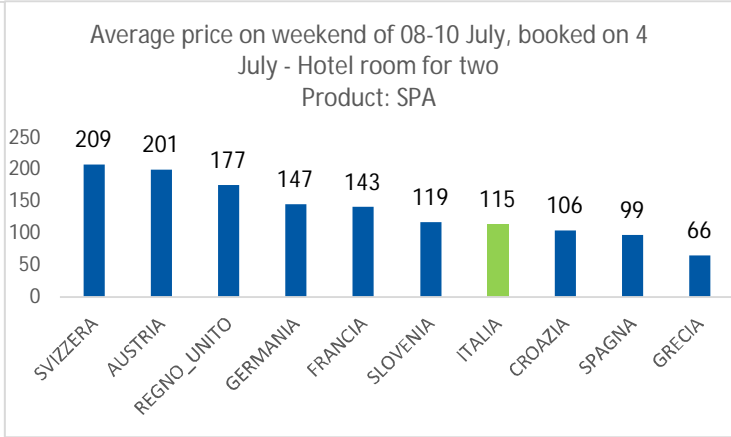
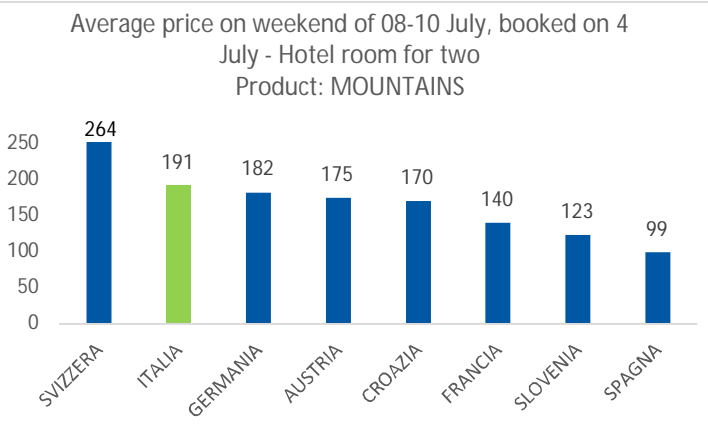
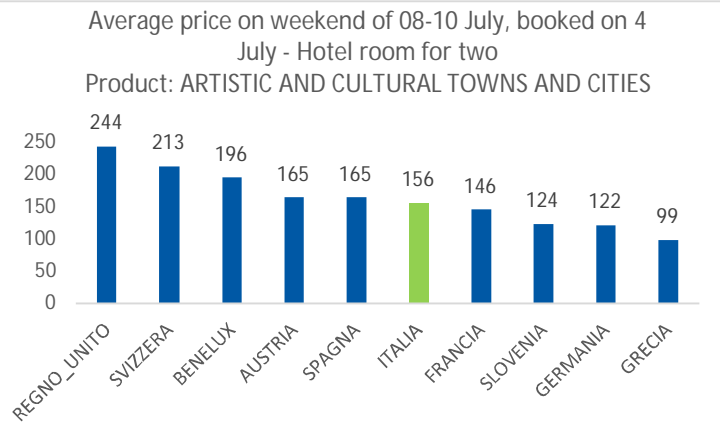


The overall bookings for June are almost on a par with those in 2019 (-0.8). The categories that have made up most ground are the mountains and spas (+8.0 and +7.1 respectively).

Source: ENIT Research Department using The Data Appeal Company data

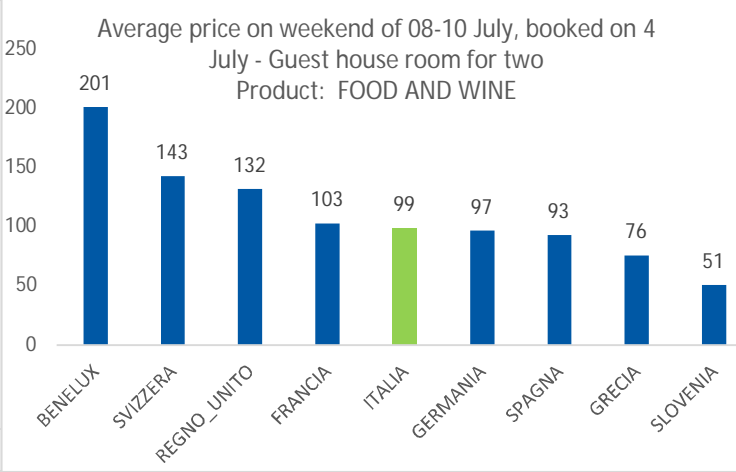
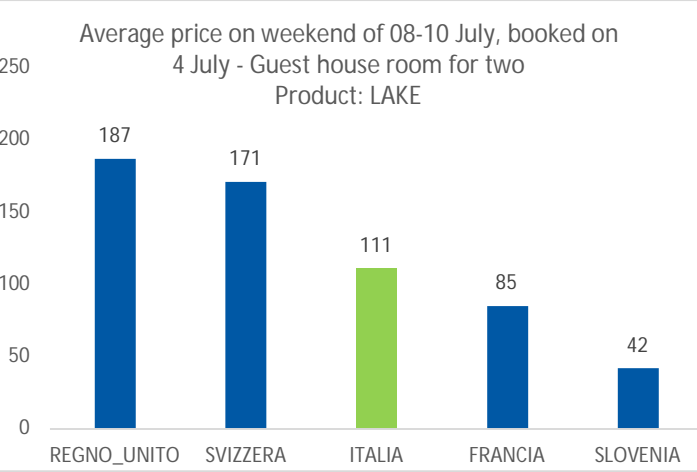
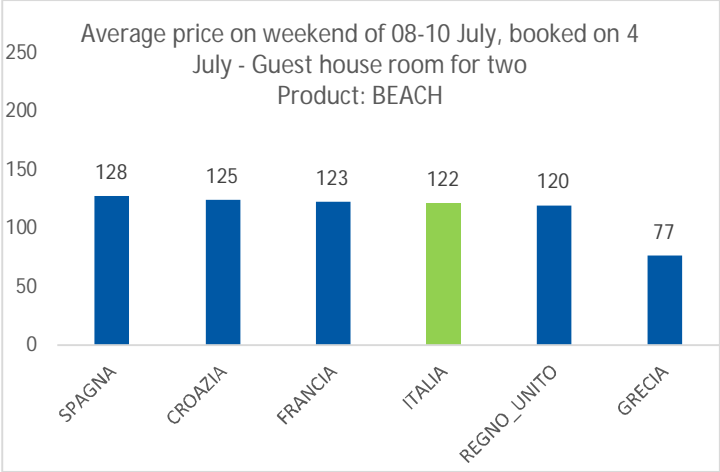
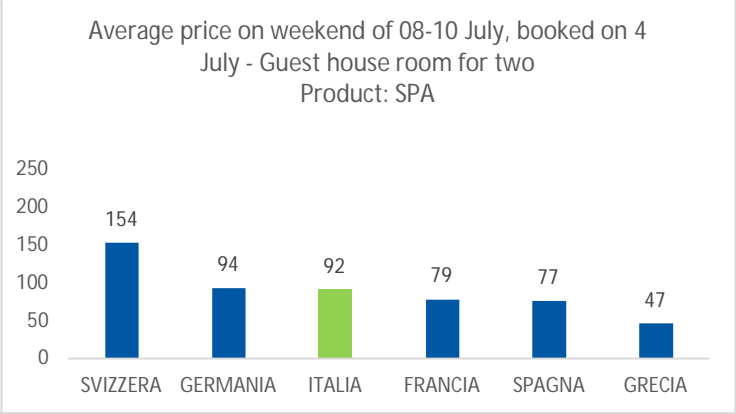
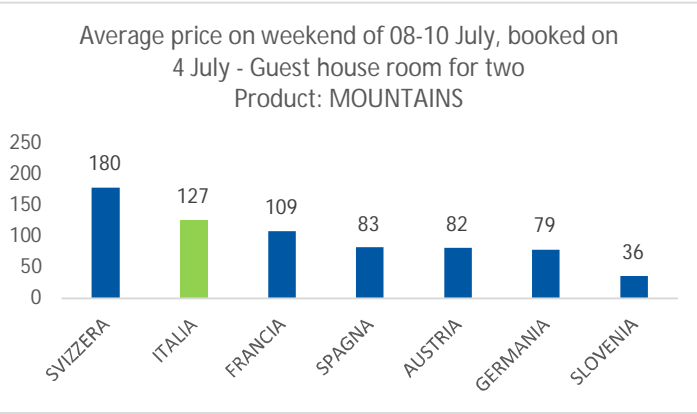
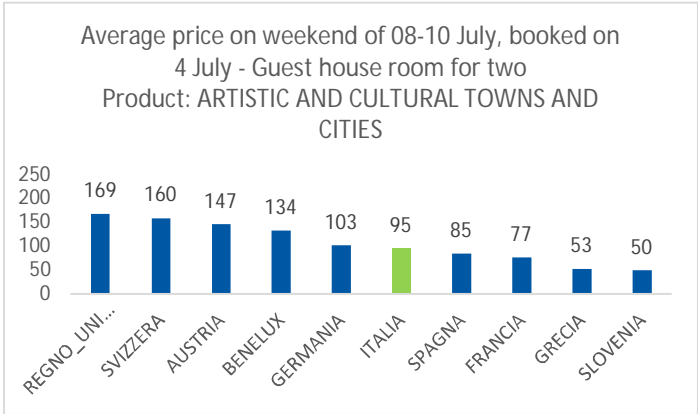
International price comparison - 2nd weekend in July

HOTELS



International price comparison - 2nd weekend in July

GUEST HOUSES

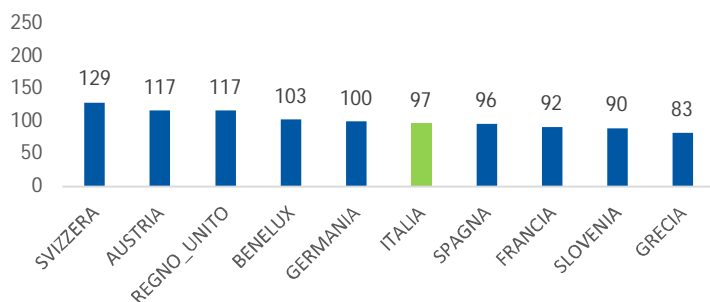


Source: ENIT Research Department using Remtene data

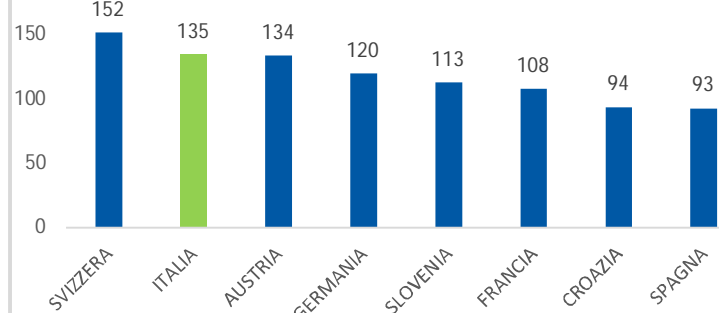
International price comparison - 2nd weekend in July

B&Bs

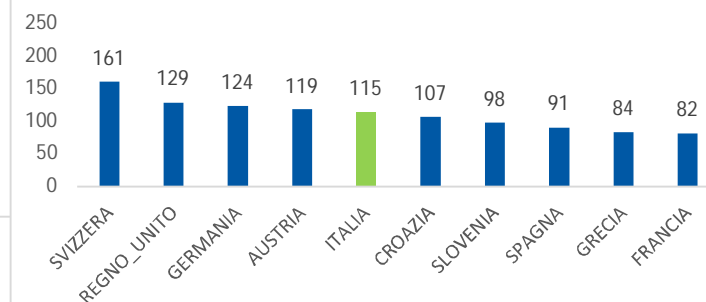
Average price on weekend of 08-10 July, booked on 4 July - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



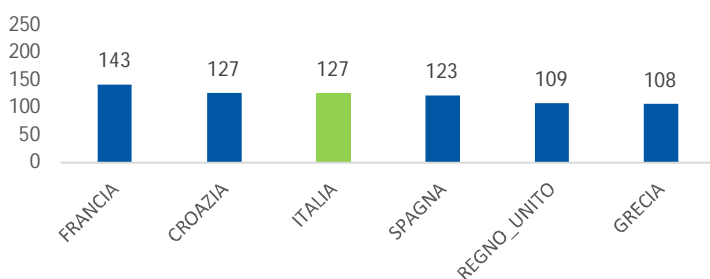
Average price on weekend of 08-10 July, booked on 4 July - B&B room for two
Product: MOUNTAINS



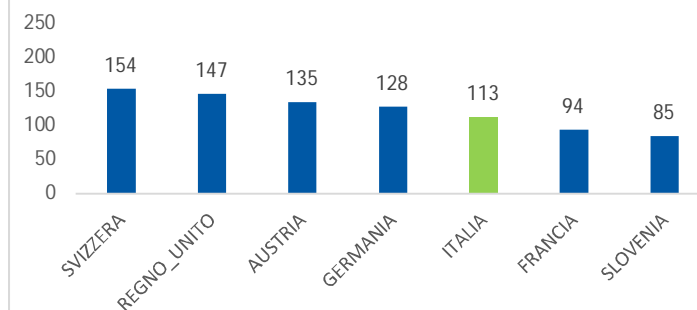
Average price on weekend of 08-10 July, booked on 4 July - B&B room for two
Product: SPA



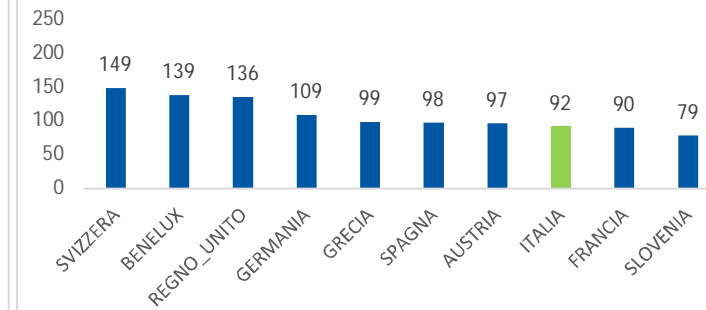
Average price on weekend of 08-10 July, booked on 4 July - B&B room for two
Product: BEACH



Average price on weekend of 08-10 July, booked on 4 July - B&B room for two
Product: LAKE

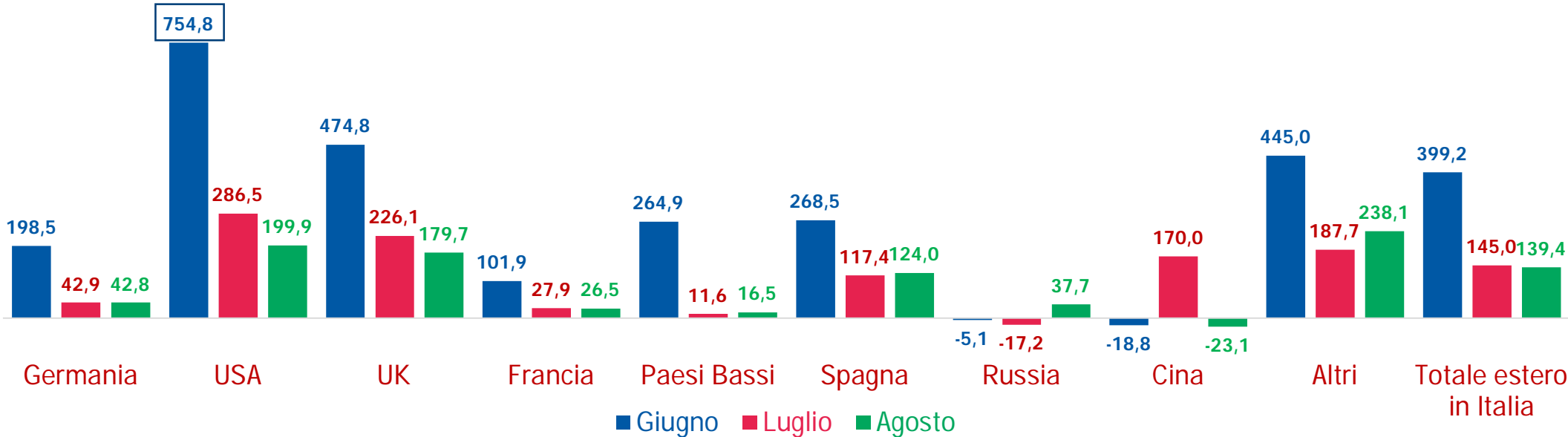


Average price on weekend of 08-10 July, booked on 4 July - B&B room for two
Product: FOOD AND WINE



International flight bookings Summer 2022

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

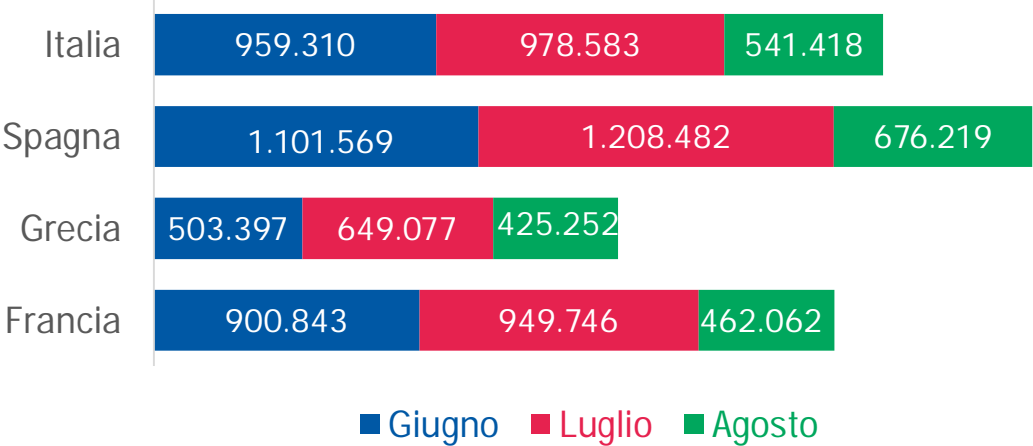


Overall, **bookings for flights from other countries to Italy are up by 399.2% in June. Bookings from the USA (+754.8%) are the biggest driving force behind this. The increase compared to 2021 currently stands at 145.0% in July and it is close to 140.0% in August.**

Source: ENIT Research Department using Forward Data – updated on 30/06/2022

International flight bookings Summer 2022

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



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

Destination	June	July	August
Italy	399.2%	145.0%	139.4%
Spain	187.2%	75.8%	77.3%
Greece	136.3%	42.7%	42.6%
France	403.5%	151.0%	183.2%

All bookings of flights to Italy are up on 2021.

Source: ENIT Research Department using Forward Data – updated on 30/06/2022

International flight bookings Summer 2022

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

Destination	Var. % 22/21	Var. % 22/19
Italy	399.2%	-25.3%
Spain	187.2%	-17.5%
Greece	136.3%	+1.2%
France	403.5%	-24.2%

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

Destination	Var. % 22/21	Var. % 22/19
Italy	145.0%	-17.2%
Spain	75.8%	-8.1%
Greece	42.7%	+15.1%
France	151.0%	-13.1%

Source: ENIT Research Department using Forward Data – updated on 30/06/2022