

ENIT BULLETIN

In-depth analysis of trends in tourism
July W1

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	Spain	100	London	100
2	Western Europe	57	USA	96	Paris	75
3	Western Asia	45	Italy	76	Dubai	66
4	North America	42	United Kingdom	71	New York	50
5	Northern Europe	40	France	64	Amsterdam	44
6	South East Asia	28	Turkey	53	Barcelona	43
7	South Asia	21	Greece	43	Lisbon	42
8	Central America	16	Germany	41	Istanbul	40
9	North Africa	16	UAE	39	Rome	37
10	Caribbean	14	India	37	Denpasar	33
18					Milan	21

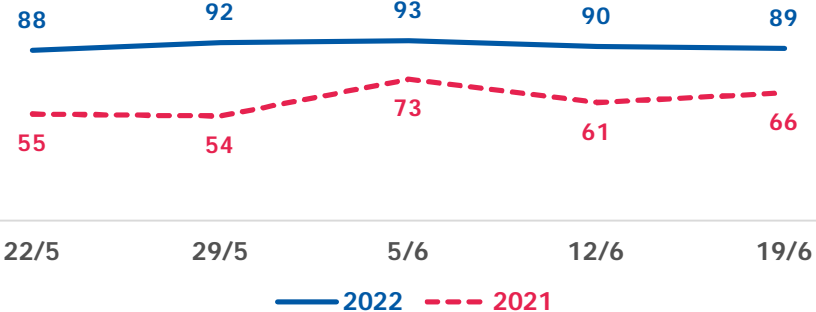
Destinations with the fastest growth in the world in terms of interest in travel

75%
Greece

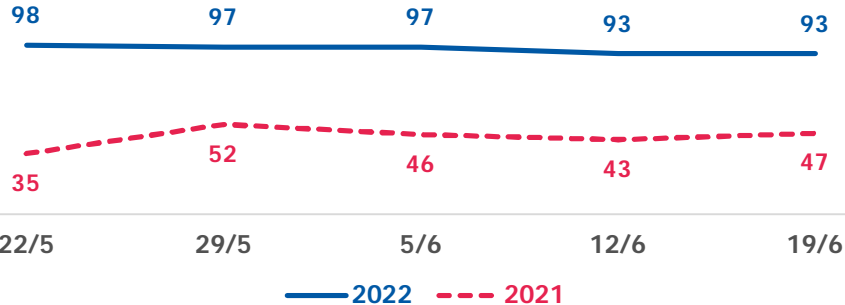
Source: ENIT Research Department using Google Destination Insights (for the period from 22/05/22 to 22/06/22, as recorded on 01/07/22) – All data is indexed

Searches on Google in other countries for travel to Italy

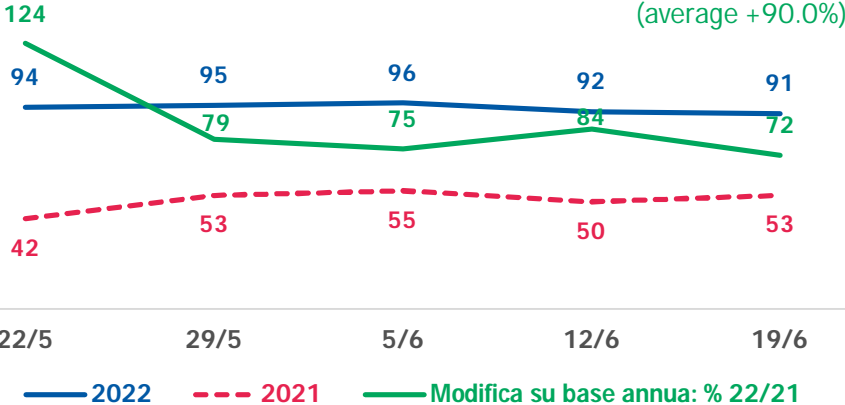
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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



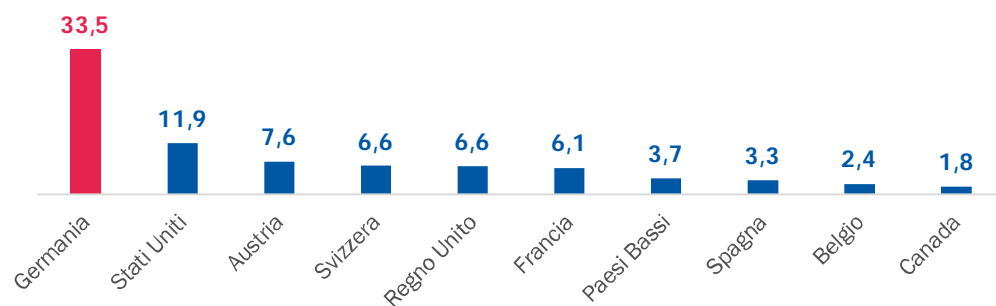
For the period analysed, the search data for travel to Italy shows that interest peaked on 5 June.

Comparison with the same dates from 2021 shows that the greatest variation (in %) was on 22 May (+124%).

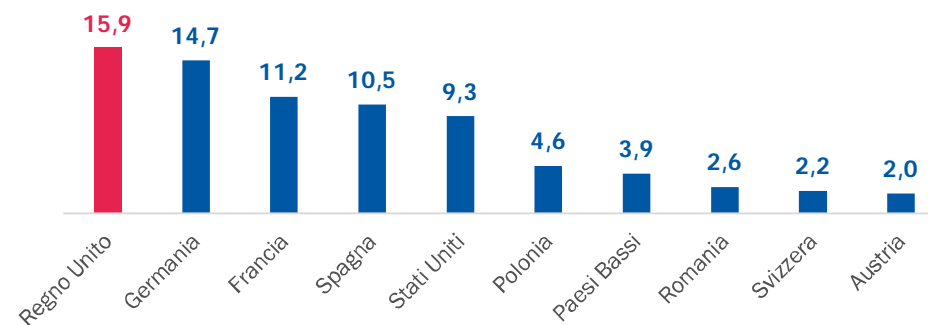
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Searches on Google in other countries for travel to Italy

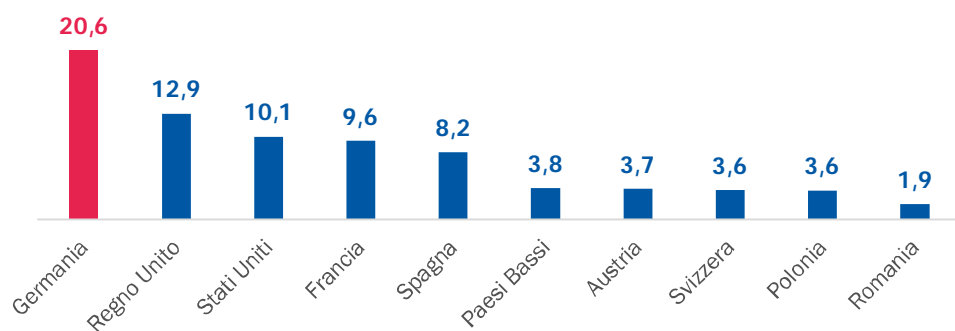
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

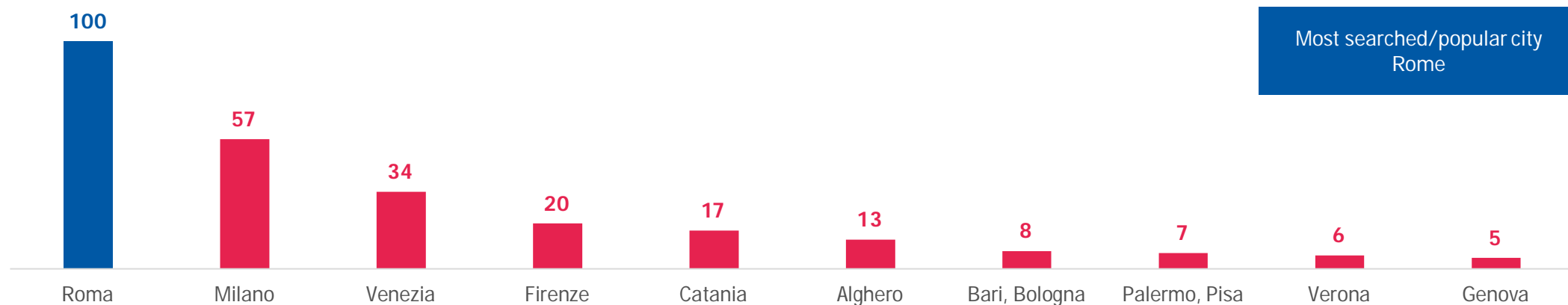


Country with greatest interest in incoming travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 22/05/22 to 22/06/22, as recorded on 01/07/22) – 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



More than 75%
Jesolo

50% to 75%
Bibione, Lido di Jesolo, Caorle, Lignano Sabbiadoro, Portofino

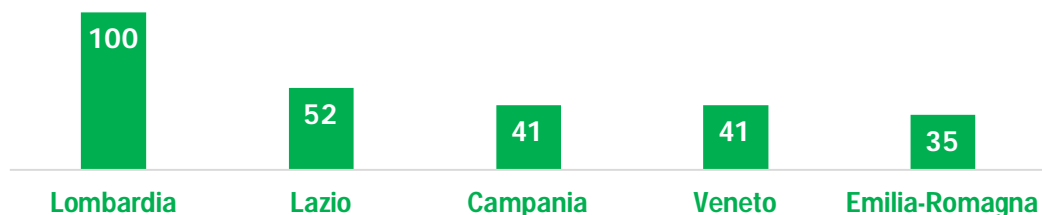
25% to 50%
Rimini, Peschiera del Garda, Grado, Pescara, etc.

10% to 25%
Bari, Pisa, Verona, Genoa, Olbia, Brindisi, Lamezia Terme, Positano, Trieste, Amalfi, etc.

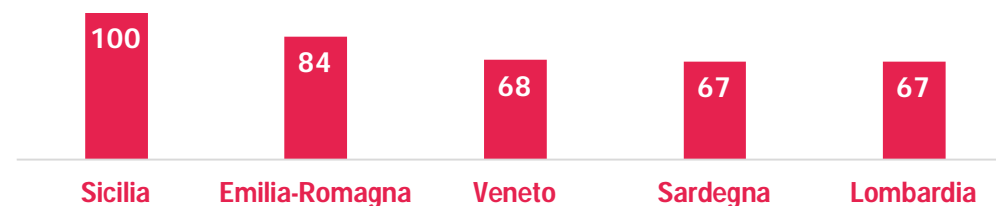
Source: ENIT Research Department using Google Destination Insights (for the period from 22/05/22 to 22/06/22, as recorded on 01/07/22) – All data is indexed

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%
Jesolo, Sant'Angelo	Olbia, Alghero, Rimini, Riccione, Cervia, Forio, Ischia, Castiglione della Pescaia, Torre San Giovanni	Catania, Cagliari, Brindisi, Lamezia Terme, Pantelleria, Reggio Calabria, Pescara, Sorrento, Ancona
50% to 75%		
Lido di Jesolo, Cesenatico, Igea Marina, Cattolica, Vieste, Caorle, Bibione, Lignano Sabbiadoro, Senigallia, Chioggia, 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)

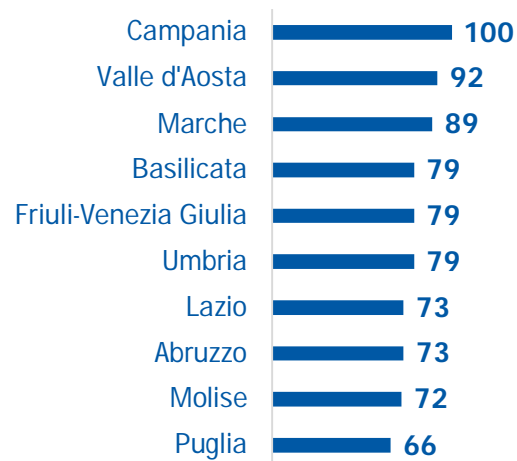
Travelling abroad



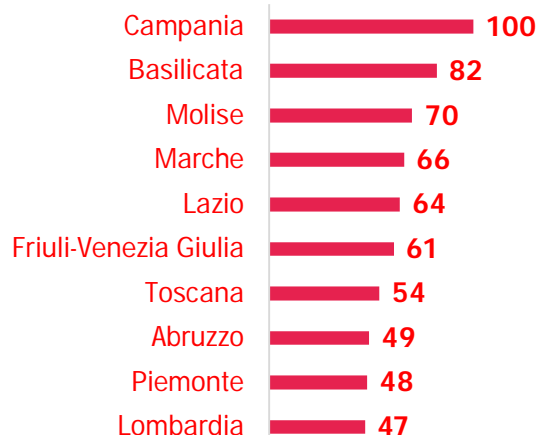
Source: ENIT Research Department using Google Destination Insights (for the period from 22/05/22 to 22/06/22, as recorded on 01/07/22) – All data is indexed

Google searches for Italy – Holidays

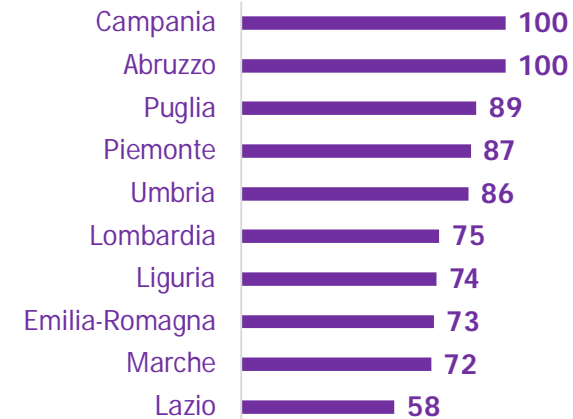
Holiday searches
Travel category: interest by region



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 + 130%; last-minute trips + 110%
Place/municipality/region/city: Pisciotta upsurge; Agropoli + 110%; Paestum + 90%
Month: October + 150%; September + 70%; July + 40%
In other countries: Gran Canaria + 200%; Seychelles + 70%

Most searched

Subject: holiday, home, flight, travel, cost
Accommodation facility: holiday home
Place/region/municipality: Cilento, Paestum, Agropoli
Month: August, July, September
In other countries: Maldives, Seychelles

Accommodation bookings through OTAs Summer 2022 (compared with 2021)

% occupancy of accommodation
in OTA channels on 01/07/2022

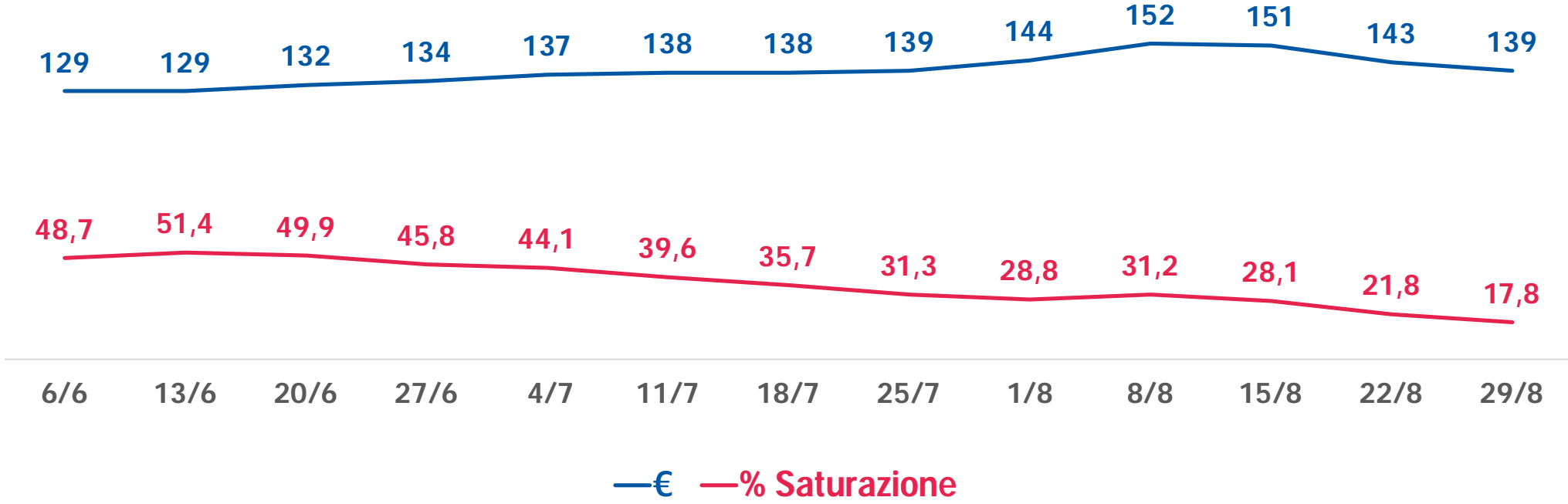
Product	June		July		August	
	2022	2021	2022	2021	2022	2021
Total for Italy	50.0	24.0	38.7	29.4	26.4	42.2
Mountains	37.6	20.5	39.8	29.0	36.0	46.6
Art and culture	55.7	23.2	37.2	26.3	22.0	36.3
Beach	47.5	27.8	46.6	38.8	35.5	57.8
Lake	58.2	28.8	53.0	42.4	44.5	61.3
Spa	40.0	24.7	35.5	30.2	26.7	50.8
Other	38.8	18.4	25.2	20.8	20.5	34.3

Bookings for accommodation facilities through Online Travel Agencies stand at 50.0% of the capacity for the month of June, which is approximately 26 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 38.7% of the capacity for July. The highest figure and biggest increase concern lakes (53.0% and +10.6). The figures for beach resorts (46.6%) and the mountains (39.8%) are also above the national average. The occupancy rate for the month of August stands at 26.4%. Leading the drive on this front are bookings for lakes (44.5%), the mountains (36.0%) and beach resorts (35.5%).

Accommodation bookings through OTAs Summer 2022

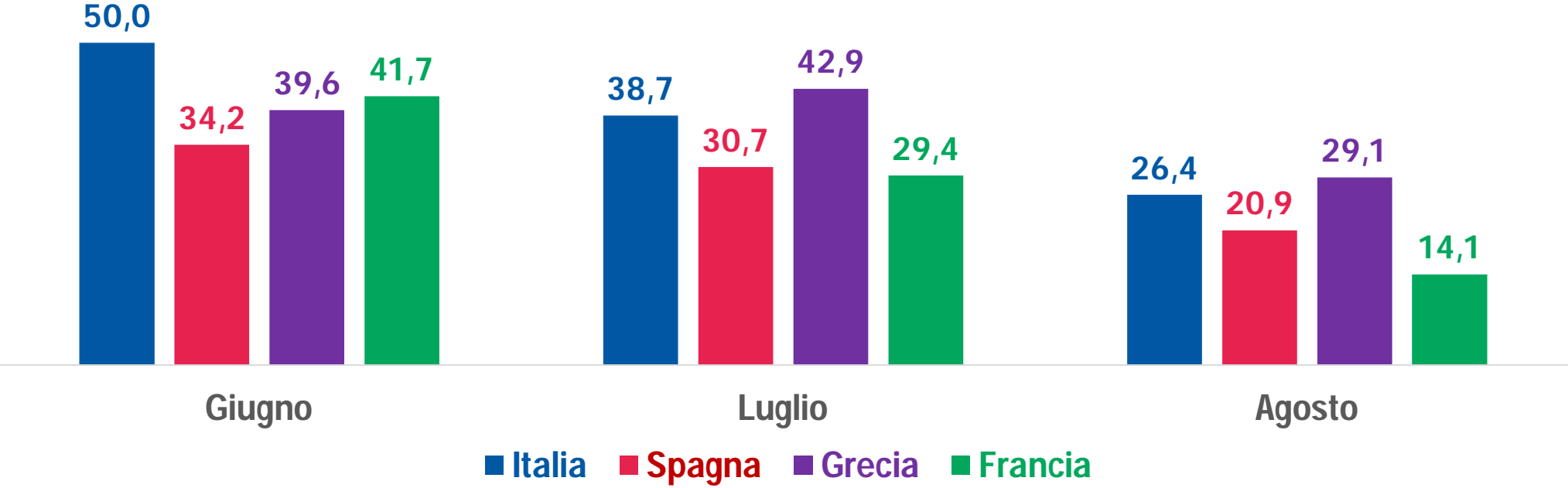
Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 01/07/2022 - Weekly data



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs Summer 2022

% occupancy of accommodation
in OTA channels on 01/07/2022 - Italy and competitors

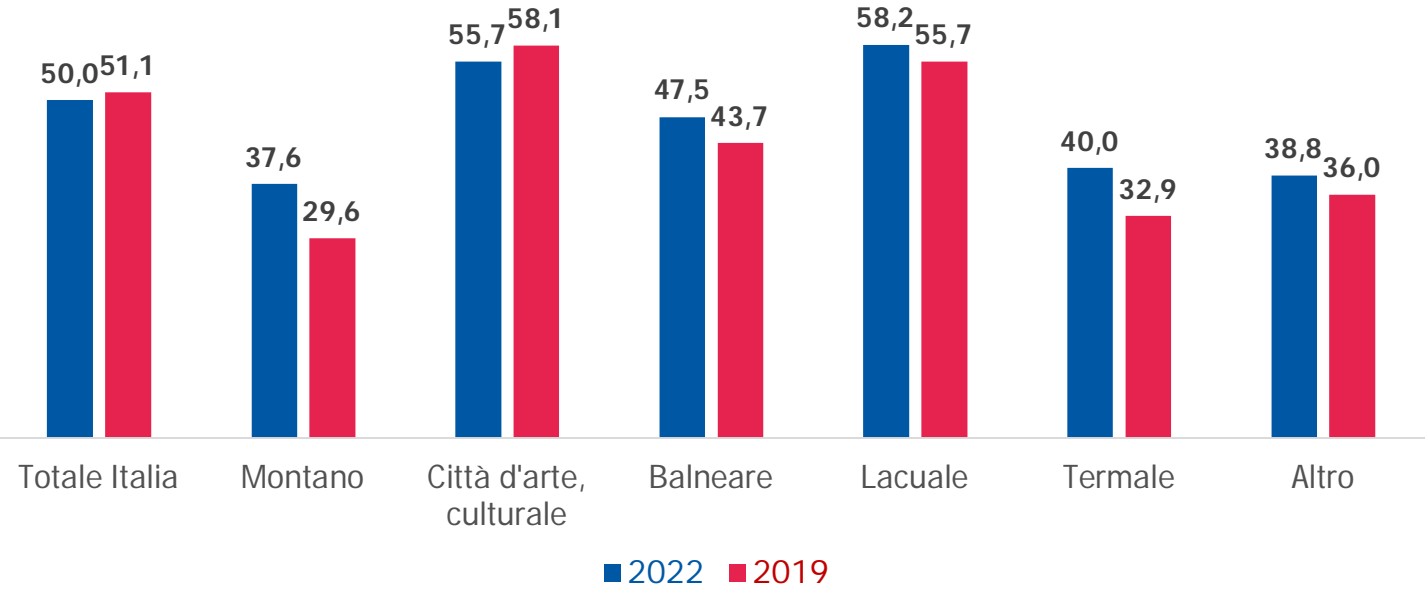


Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs

June 2022/2019

June: % occupancy of accommodation in OTA channels on 01/07/2022

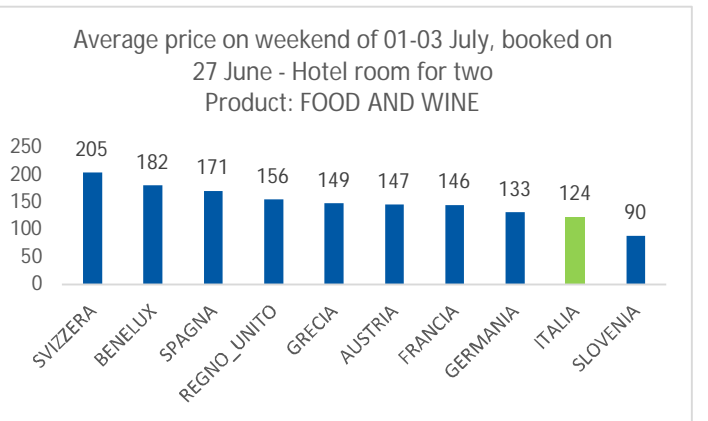
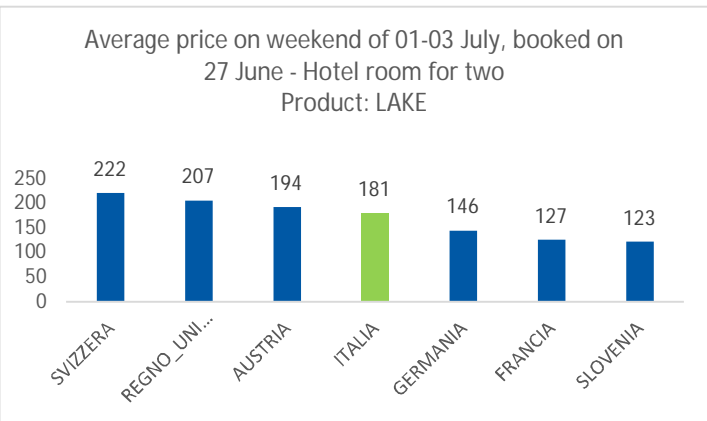
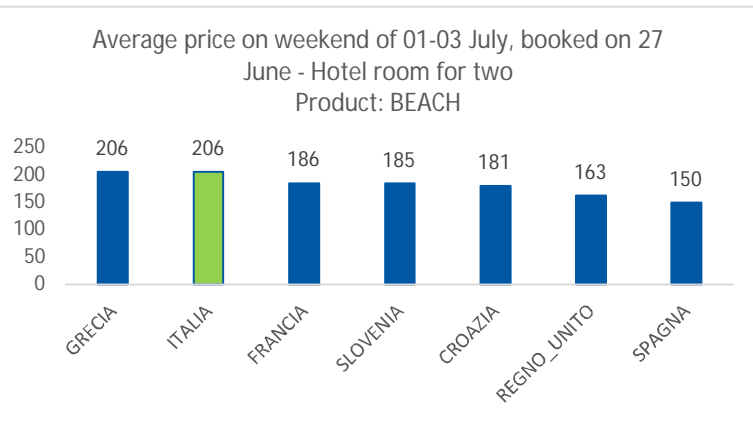
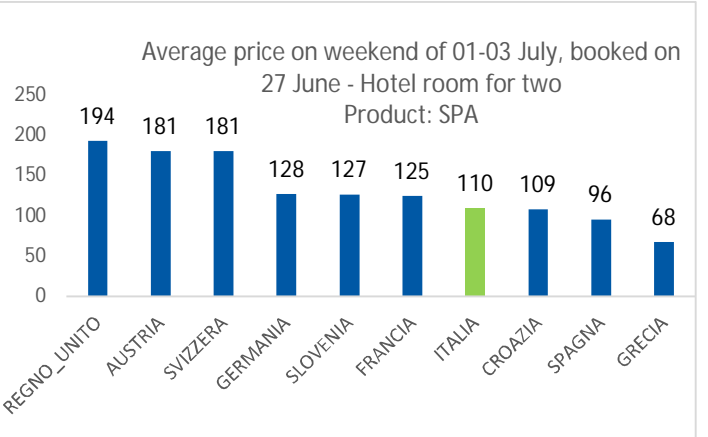
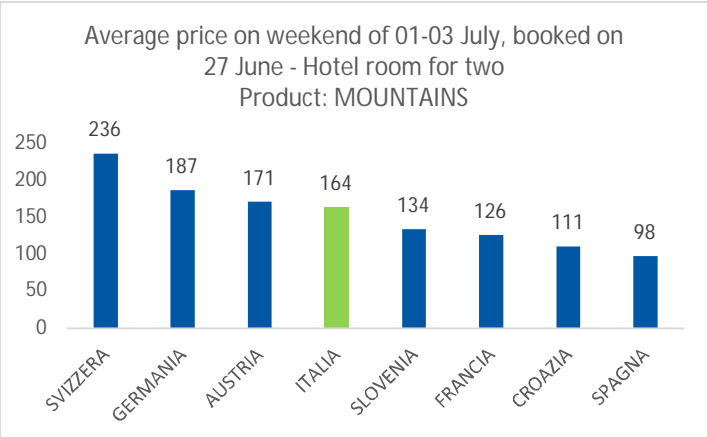
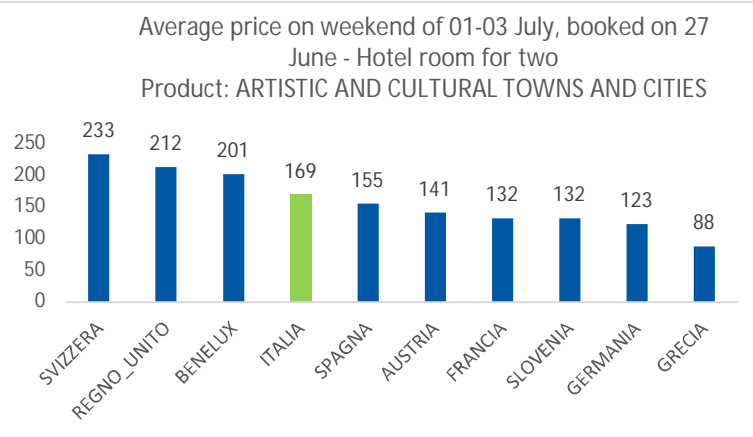


At present, the overall figure for bookings in June comes close to that in 2019 (50.0% vs. 51.1%). Mountains and spas have made up the most ground (+7.1).

Source: ENIT Research Department using The Data Appeal Company data

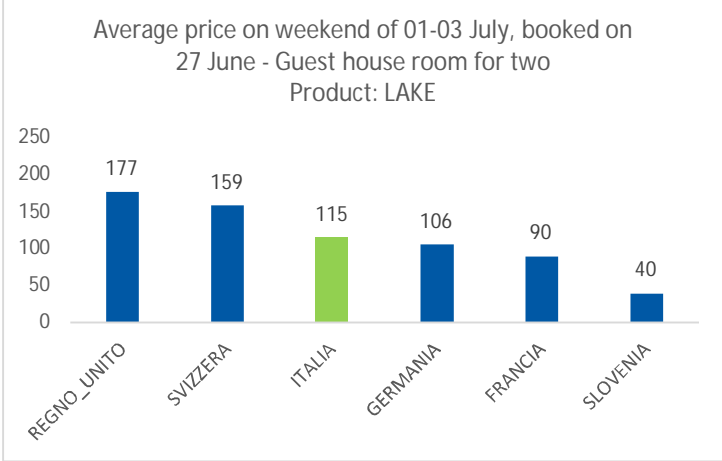
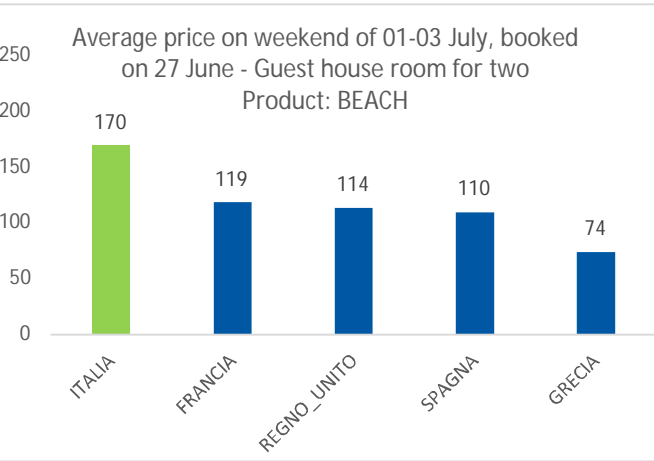
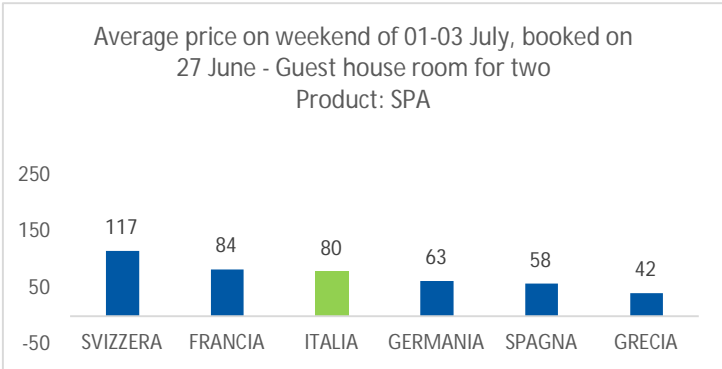
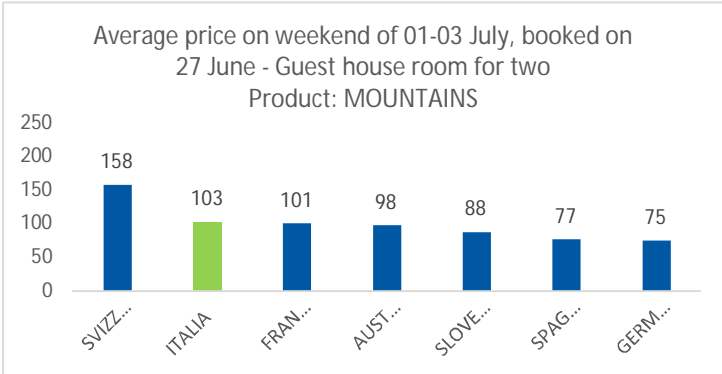
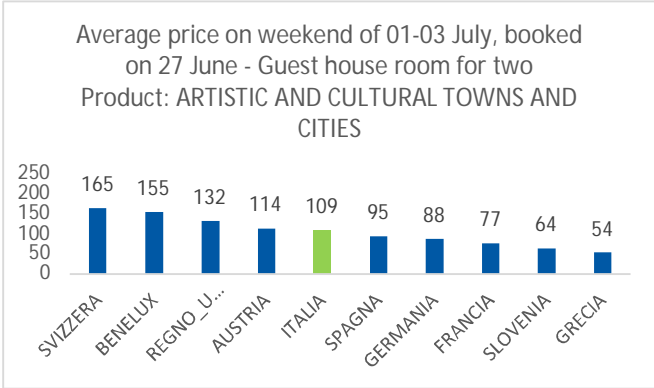
International price comparison - 1st weekend in July

HOTELS



International price comparison - 1st weekend in July

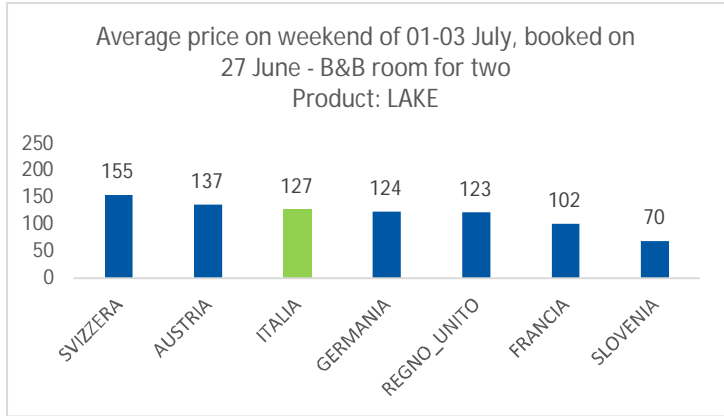
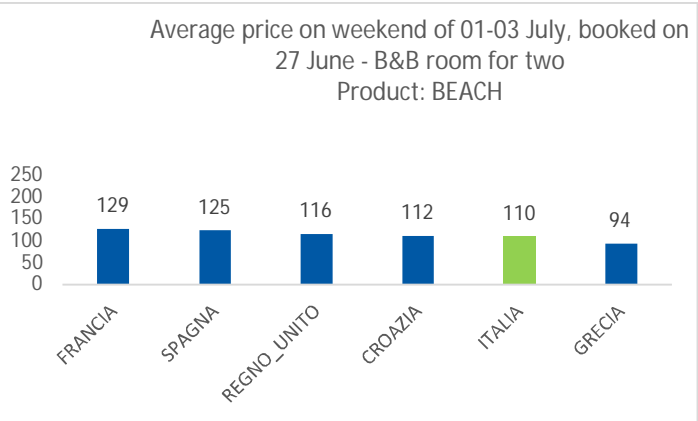
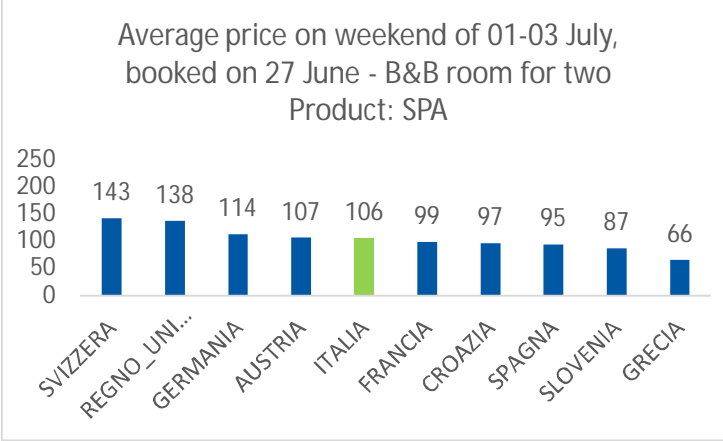
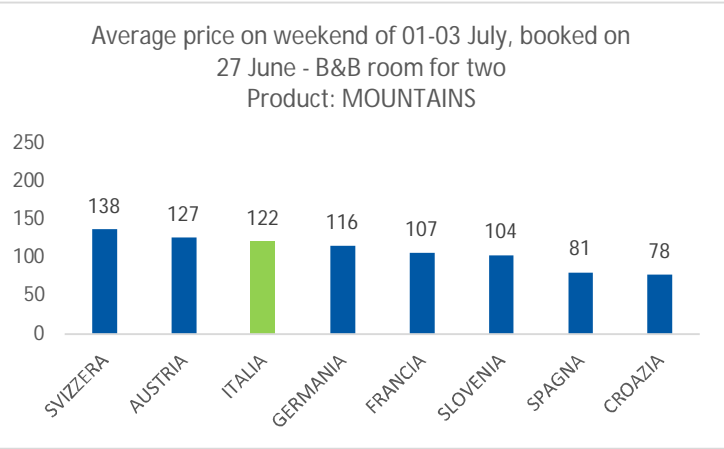
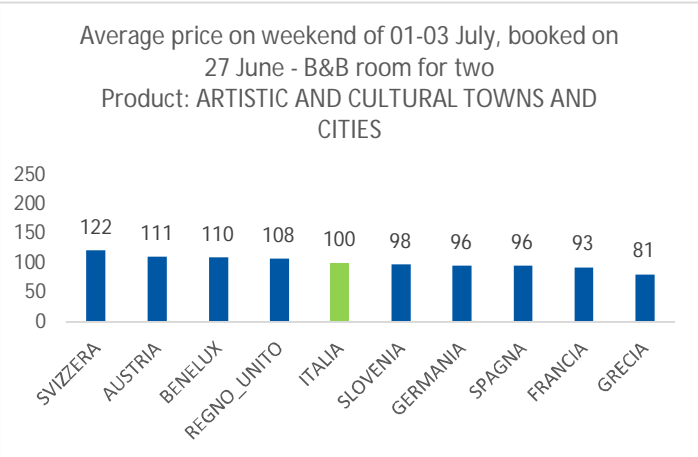
GUEST HOUSES



Source: ENIT Research Department using Remtene data

International price comparison - 1st weekend in July

B&Bs

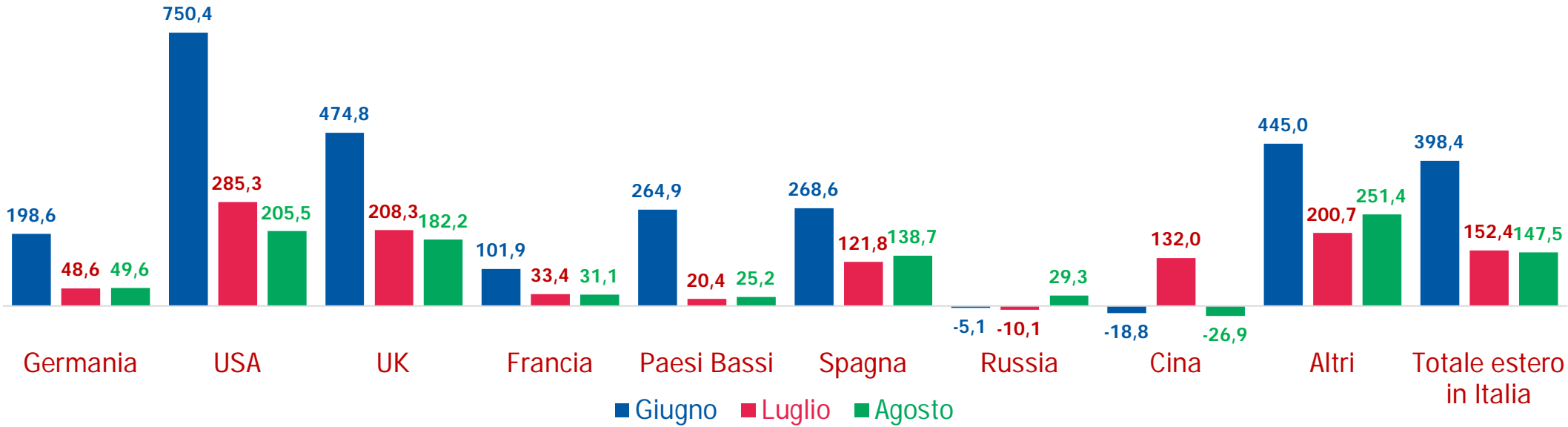


Source: ENIT Research Department using Remtene data



International flight bookings Summer 2022

Bookings of flights to Italy by country of origin
Var. % 2022/2021 as of 01/07/2022

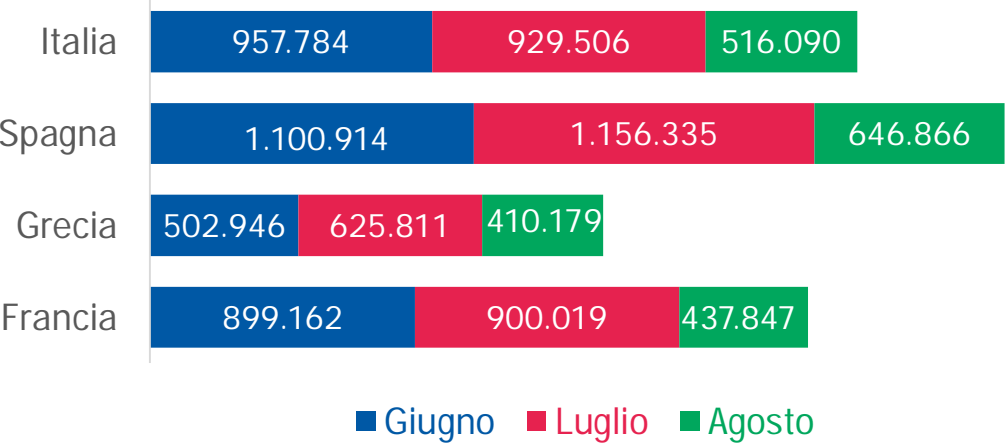


Overall, **bookings for flights from other countries to Italy are currently up on 2021 by +398.4% in June, +152.4% in July and +147.5% in August.**

Source: ENIT Research Department using Forward Data – updated on 26/06/2022

International flight bookings Summer 2022

Flight bookings on 01/07/2022
Total international flights to Italy and competitors



Total international flight bookings, Italy and competitors
Var. % 2022/2021, as of 01/07/2022

Destination	June	July	August
Italy	398.4%	152.4%	147.5%
Spain	187.0%	81.2%	81.5%
Greece	136.1%	46.8%	46.2%
France	402.6%	159.6%	193.5%

All bookings of flights to Italy are up on 2021.

Source: ENIT Research Department using Forward Data – updated on 26/06/2022

International flight bookings Summer 2022

Total international flight bookings, Italy and competitors
Var. % June 2022/2021 and 2022/2019, as of 01/07/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	398.4%	-25.5%
Spain	187.0%	-17.6%
Greece	136.1%	+1.1%
France	402.6%	-24.3%

Total flight bookings, Italy and competitors
Var. % July 2022/2021 and 2022/2019, as of 01/07/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	152.4%	-17.6%
Spain	81.2%	-8.4%
Greece	46.8%	14.7%
France	159.6%	-13.1%

Source: ENIT Research Department using Forward Data – updated on 26/06/2022