

ENIT BULLETIN

In-depth analysis of trends in tourism
June W3

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	56	USA	90	Paris	82
3	Western Asia	45	Italy	73	Dubai	71
4	North America	40	United Kingdom	65	New York	49
5	Northern Europe	38	France	63	Barcelona	47
6	South East Asia	26	Turkey	49	Amsterdam	47
7	South Asia	21	Greece	41	Lisbon	45
8	Central America	15	UAE	39	Istanbul	42
9	North Africa	15	Portugal	37	Rome	40
10	Caribbean	14	Germany	37	Denpasar	33

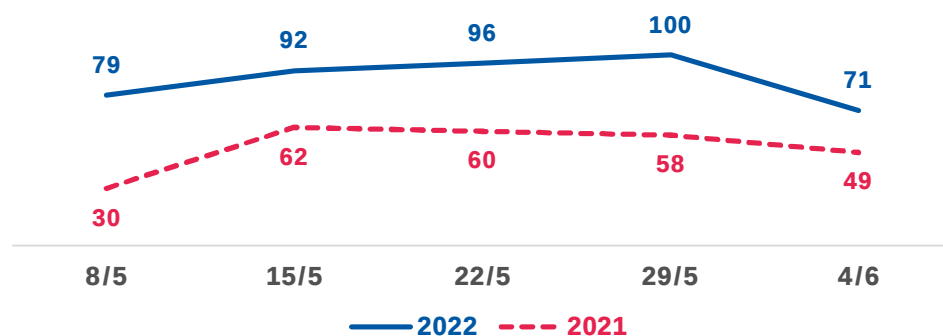
Destinations with the fastest growth in the world in terms of interest in travel

50%
Greece

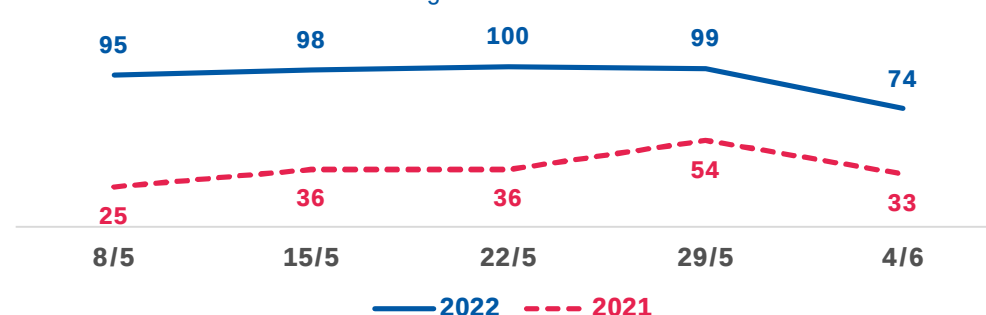
Source: ENIT Research Department using Google Destination Insights (for the period from 08/05/22 to 08/06/22, as recorded on 16/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

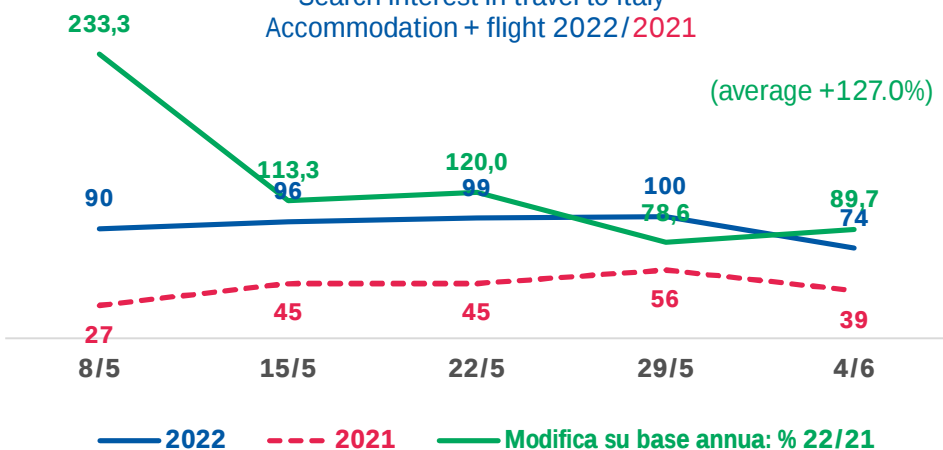
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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



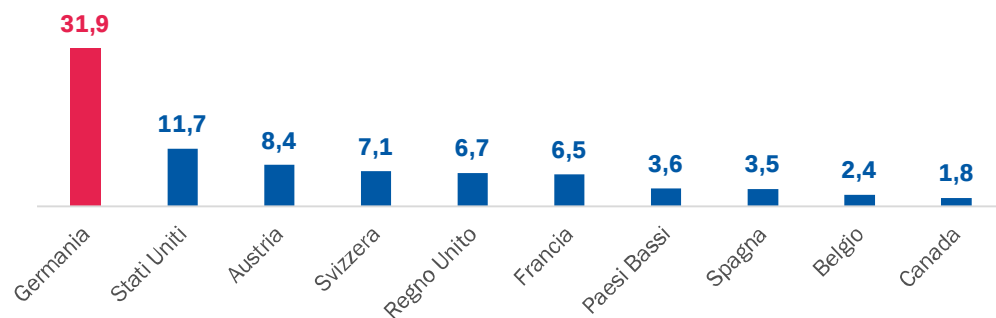
For the period analysed, the search data for travel to Italy shows that interest peaked on 29 May.

Comparison with the same dates from 2021 shows that the greatest variation (in %) was on 8 May (+233.3%).

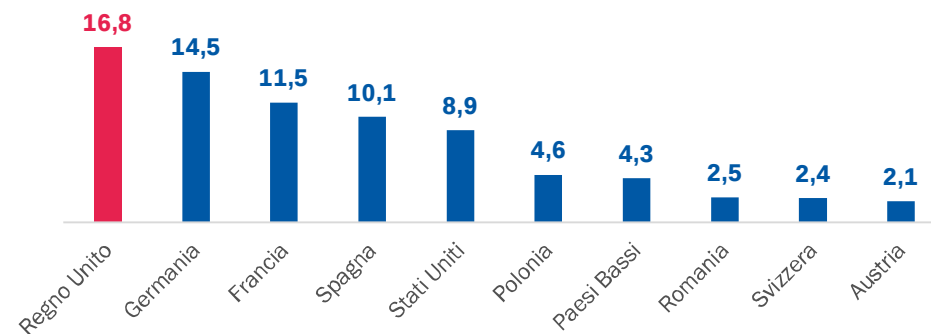
Source: ENIT Research Department using Google Destination Insights (for the period from 08/05/22 to 08/06/22, as recorded on 16/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

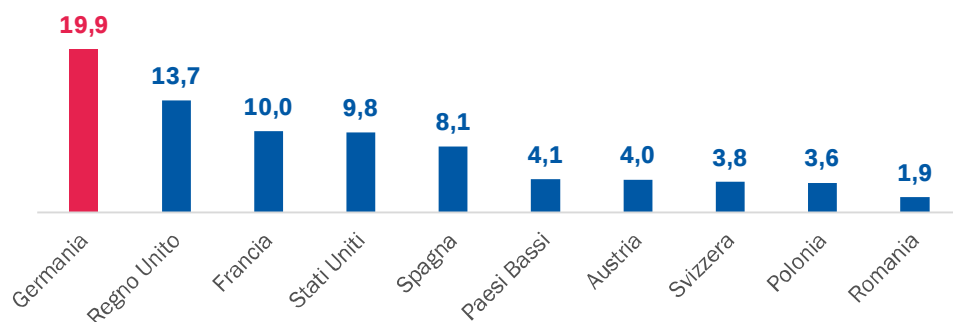
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

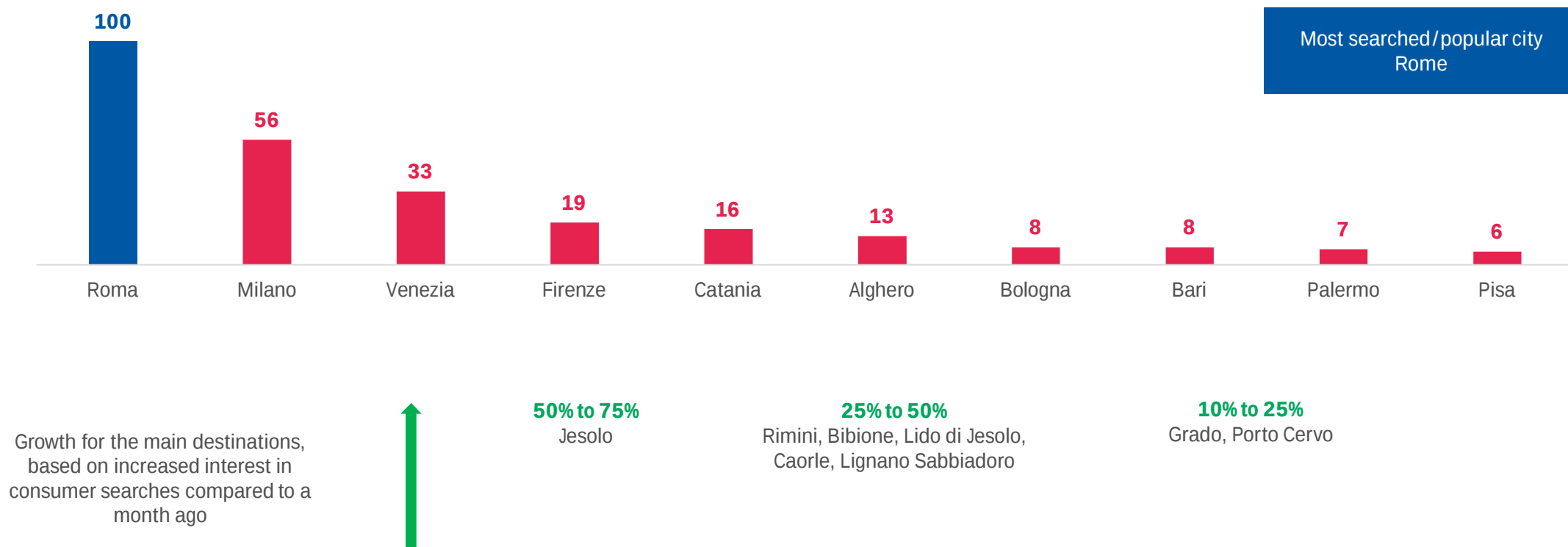


Country with greatest
interest in incoming
travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 08/05/22 to 08/06/22, as recorded on 16/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

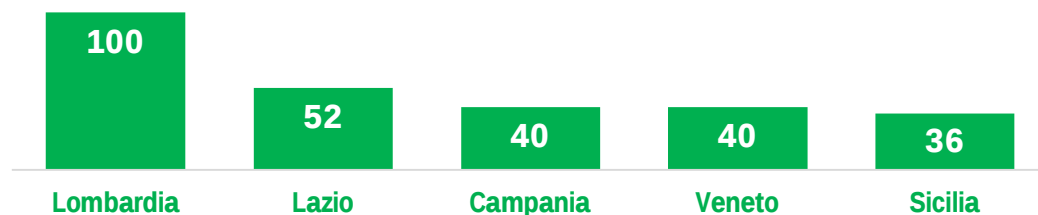
Volume of interest
Main destination cities: Flight + accommodation



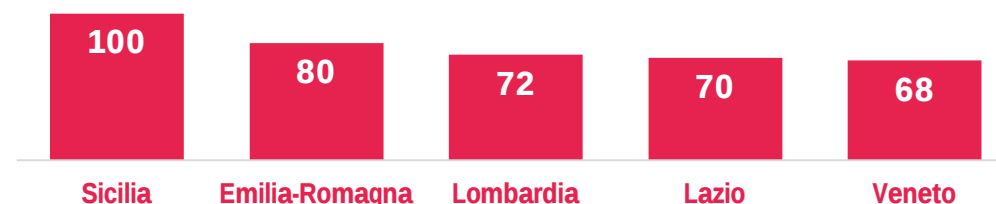
Source: ENIT Research Department using Google Destination Insights (for the period from 08/05/22 to 08/06/22, as recorded on 16/06/22) – All data is indexed

Searches on Google in Italy for travel in Italy

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



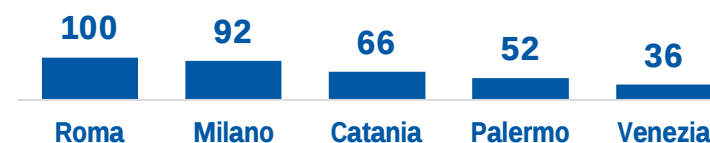
TOP 5 destination regions
in terms of volume of interest – Flight + accommodation



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%
Lido di Jesolo	Rimini, Riccione, Cesenatico, Cattolica, Igea Marina, Vieste, Bibione, Lignano Sabbiadoro, San Benedetto del Tronto, Senigallia, Torre San Giovanni, Castiglione della Pescaia	Olbia, Alghero, Pantelleria, Ischia, Ancona, Syracuse
50% to 75%		
Caorle, Chioggia, Jesolo		

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)

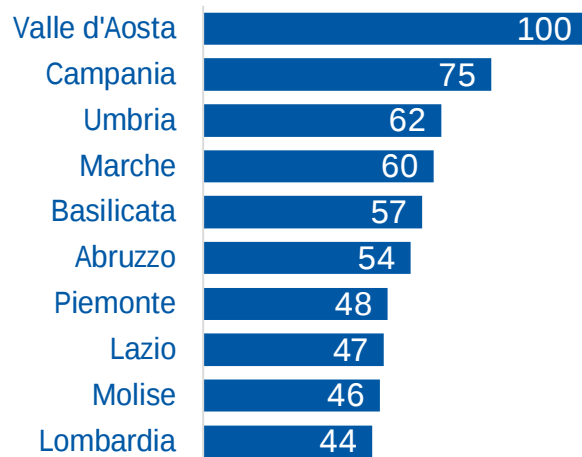
Travelling abroad



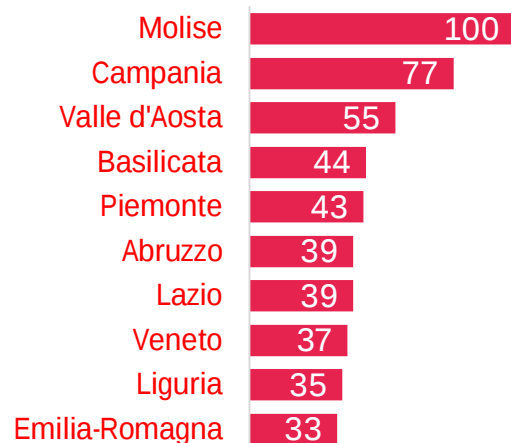
Source: ENIT Research Department using Google Destination Insights (for the period from 08/05/22 to 08/06/22, as recorded on 16/06/22) – All data is indexed

Google searches for Italy – Holidays

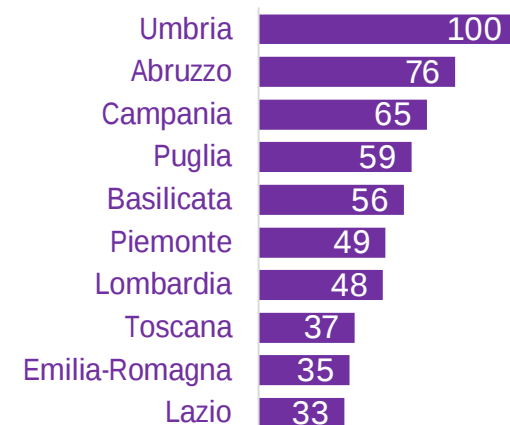
Holiday searches
Travel category: interest by region



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

Accommodation facility: all-inclusive resort +80%
Place/municipality/region/city: Campania +750%; Porto Cesareo +300%; Palinuro +250%; San Vito Lo Capo +180%; Trentino-Alto Adige/Südtirol +140%
Time: week +110%
Month: July +50%
In other countries: Kos +180%; Lisbon +130%; Lanzarote +130%; Formentera +110%

Most searched

Subject: holiday, home, flight, travel, cost, summer, car
Accommodation facility: holiday home, apartment, all-inclusive resort
Place/region/municipality: Cilento, Palinuro
Month: August, June, July

In other countries: Maldives, Formentera

Source: ENIT Research Department using Google Trends data on 16/06/2022 – Last 30 days

Accommodation bookings through OTAs

Summer 2022 (compared with 2021)

% occupancy of accommodation
in OTA channels on 16/06/2022

Product	June		July		August	
	2022	2021	2022	2021	2022	2021
Total for Italy	46.3	24.0	29.5	29.4	21.1	42.2
Mountains	34.3	20.5	32.2	29.0	29.3	46.6
Art and culture	51.7	23.2	27.6	26.3	17.5	36.3
Beach	44.4	27.8	37.0	38.8	28.7	57.8
Lake	55.4	28.8	43.8	42.4	36.4	61.3
Spa	37.4	24.7	29.4	30.2	21.8	50.8
Other	34.5	18.4	17.8	20.8	16.4	34.3

Bookings for accommodation facilities through Online Travel Agencies stand at 46.3% of the capacity for the month of June, which is approximately 22.3 percentage points more than last year. “Lake” bookings (55.4%) are above the national average and have made up ground compared to 2021 (+26.6%), as have “Cultural” bookings (51.7% and +28.5%).

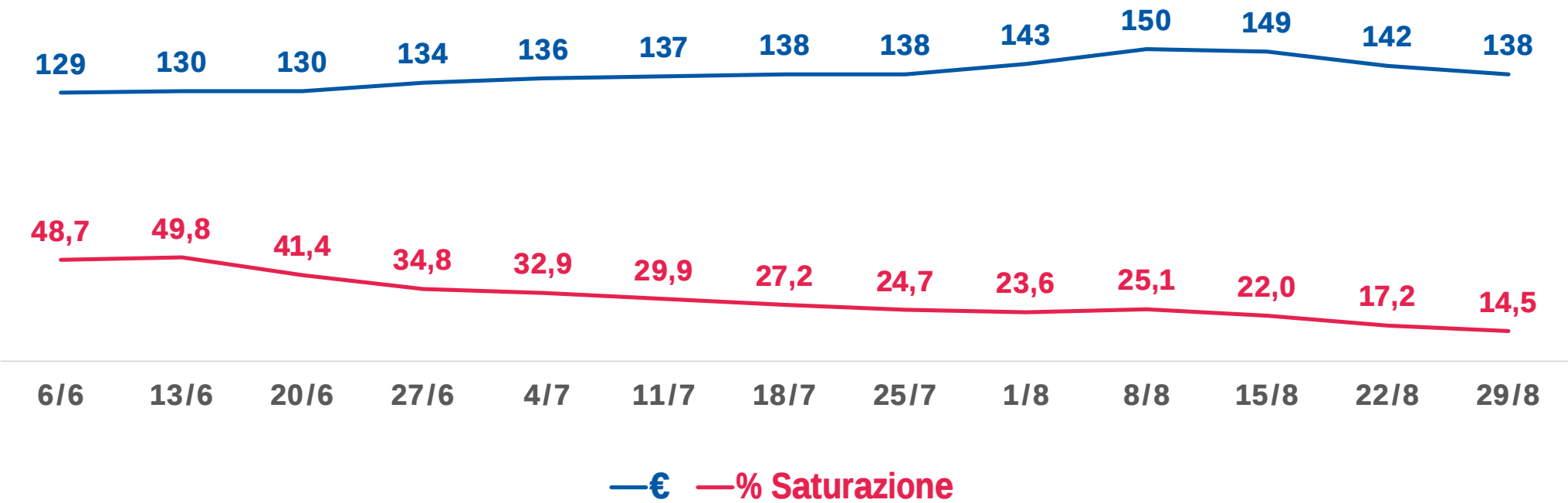
At present, bookings cover 29.5% of the capacity for July. The highest figures and biggest increases concern lakes (43.8% and +1.4%). The figure for beach resorts is also above the national average (37%). The occupancy rate for the month of August stands at 21.1%. Leading the drive on this front are bookings for lakes (36.4%), the mountains (29.3%) and beach resorts (28.7%).

Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs

Summer 2022

Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 16/06/2022 - Weekly data

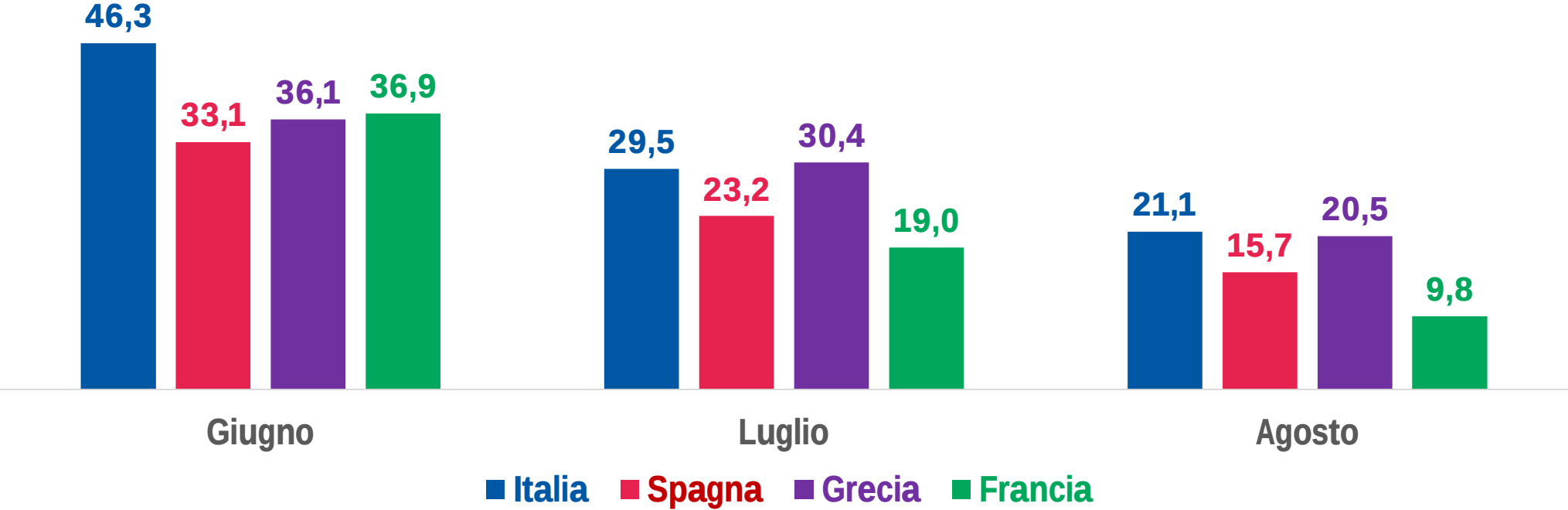


Source: ENIT Research Department using The Data.Appeal Company data

Accommodation bookings through OTAs

Summer 2022

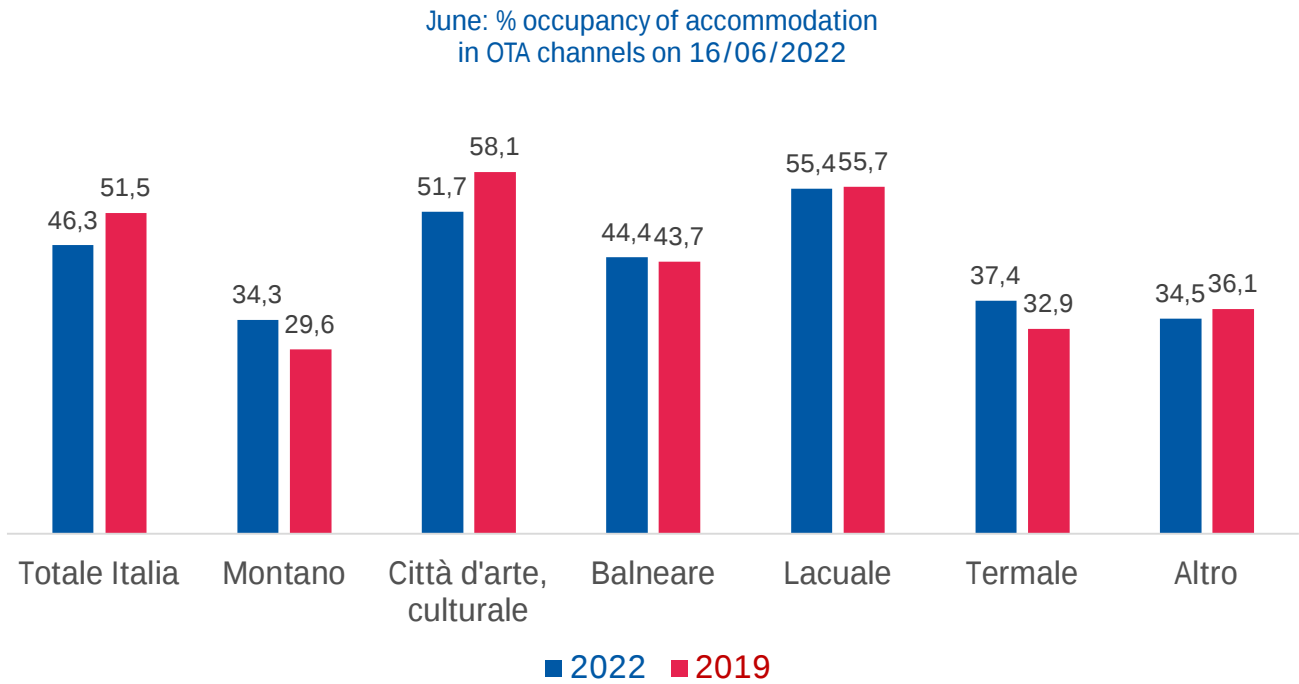
% occupancy of accommodation
in OTA channels on 16/06/2022 - Italy and competitors



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs

June 2022/2019

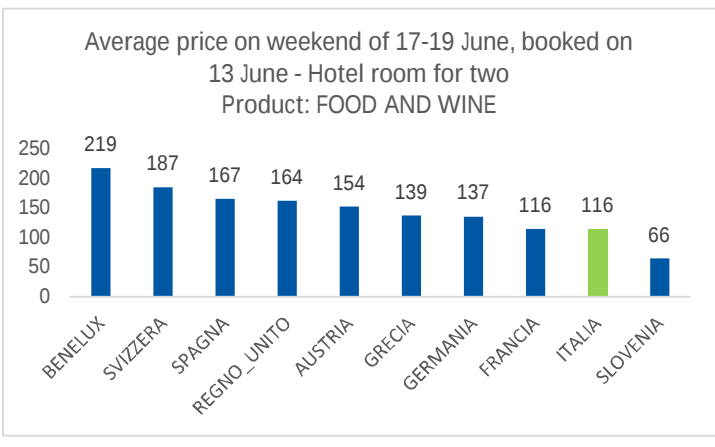
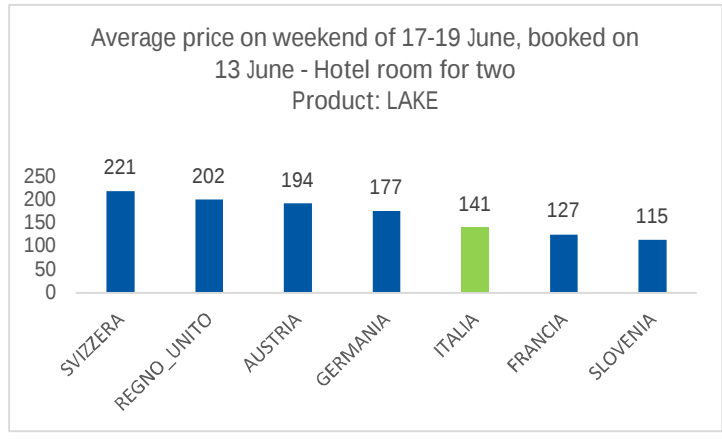
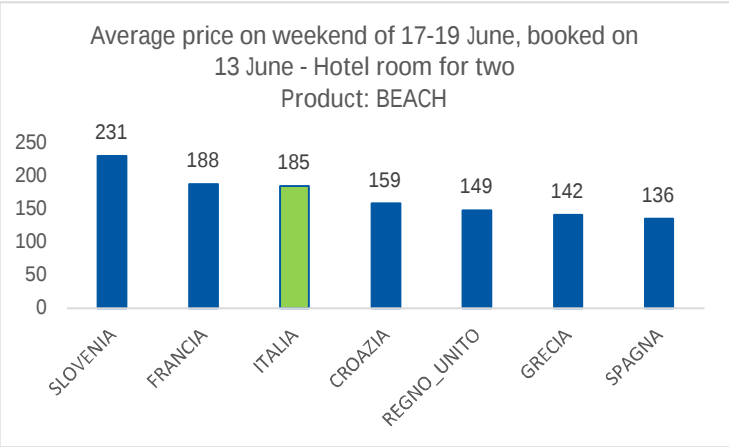
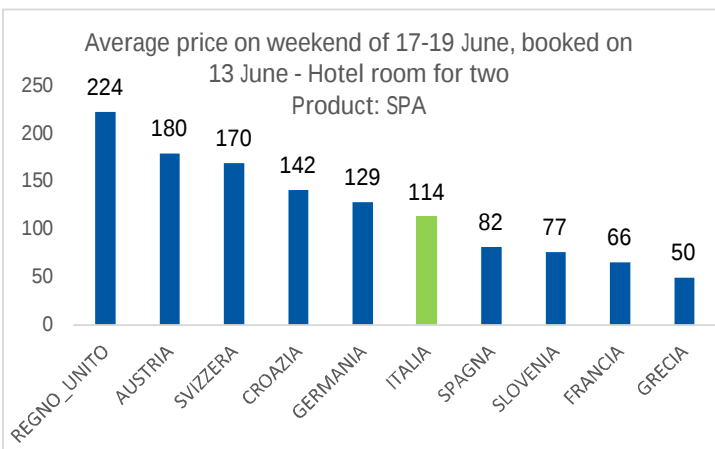
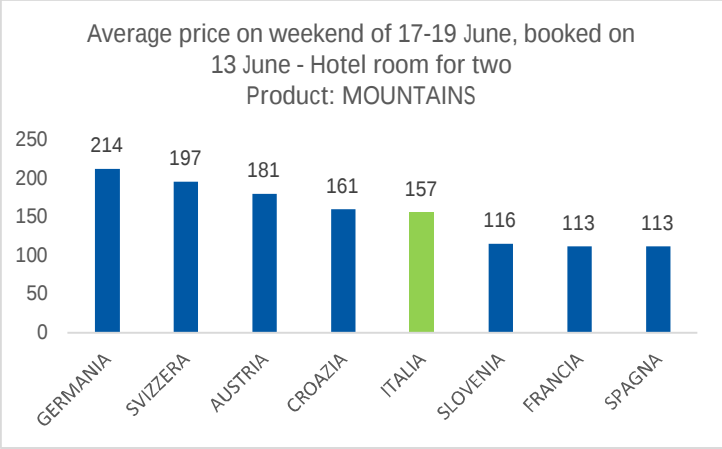
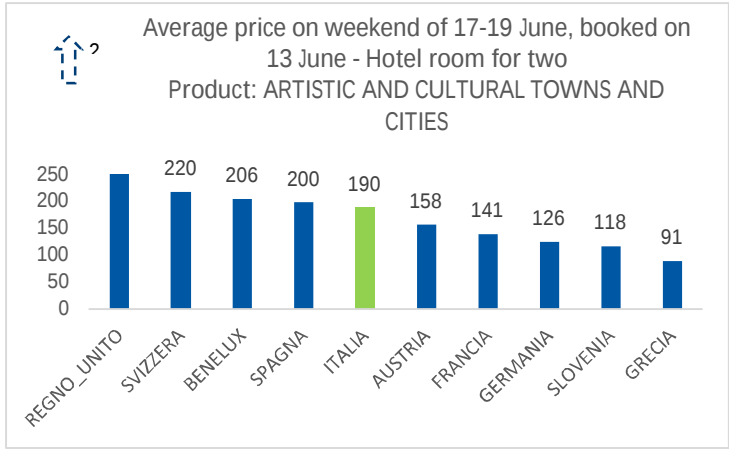


At present, overall bookings for June are down by 5.2 percentage points on 2019. Ground has been made up by bookings for the mountains (+4.7), spas (+4.5) and beach resorts (+0.7).

Source: ENIT Research Department using The Data.Appeal Company data

International price comparison - 3rd weekend in June

HOTELS

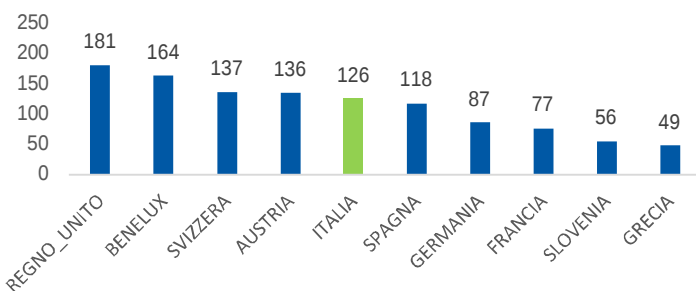


Source: ENIT Research Department using Remtene data

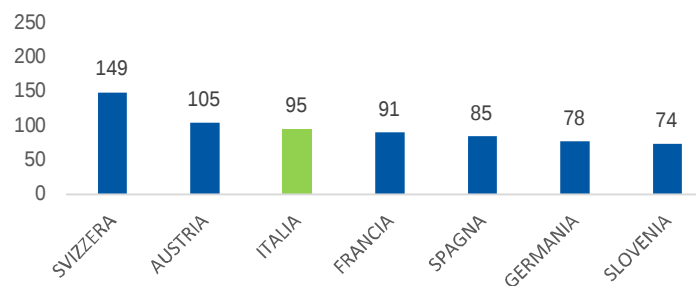
International price comparison - 3rd weekend in June

GUEST HOUSES

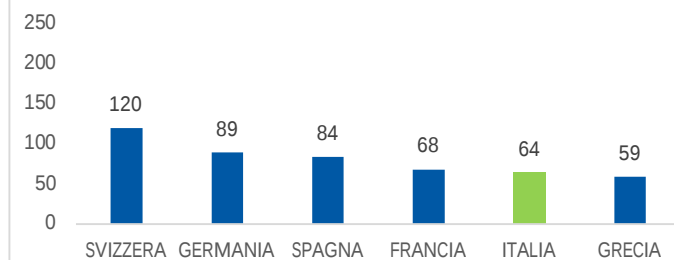
Average price on weekend of 17-19 June, booked on 13 June - Guest house room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



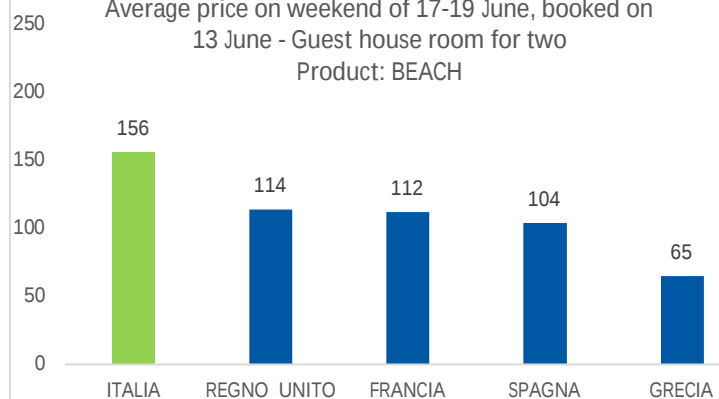
Average price on weekend of 17-19 June, booked on 13 June - Guest house room for two
Product: MOUNTAINS



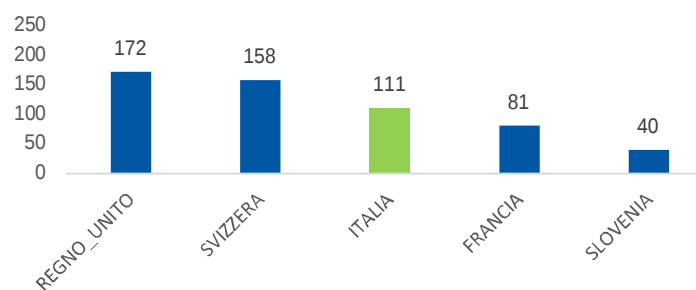
Average price on weekend of 17-19 June, booked on 13 June - Guest house room for two
Product: SPA



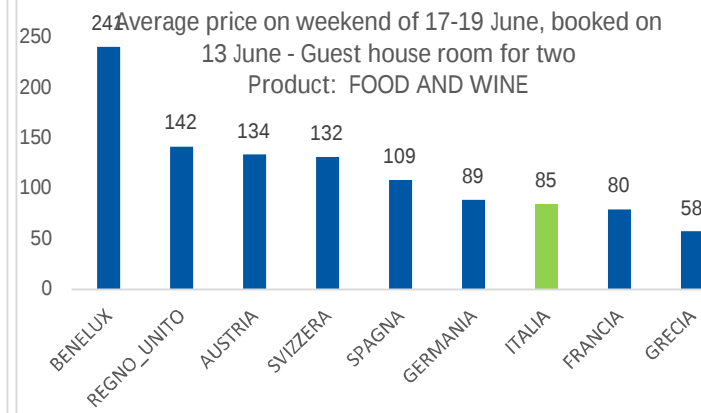
Average price on weekend of 17-19 June, booked on 13 June - Guest house room for two
Product: BEACH



Average price on weekend of 17-19 June, booked on 13 June - Guest house room for two
Product: LAKE



Average price on weekend of 17-19 June, booked on 13 June - Guest house room for two
Product: FOOD AND WINE

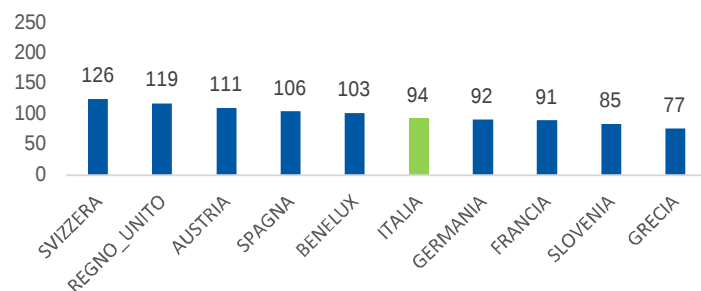


Source: ENIT Research Department using Remtene data

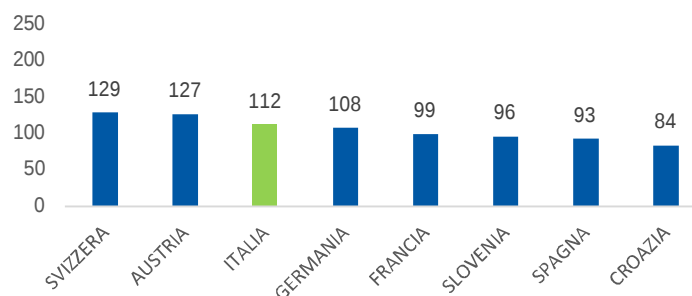
International price comparison - 3rd weekend in June

B&Bs

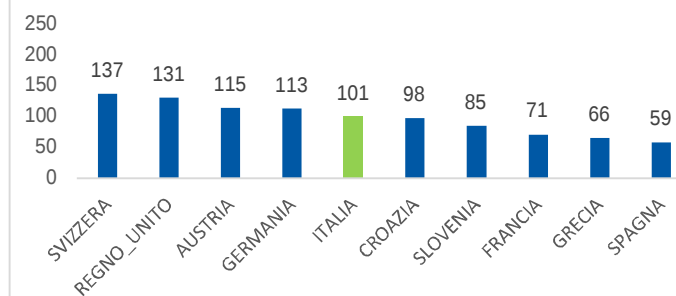
Average price on weekend of 17-19 June, booked on 13 June - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



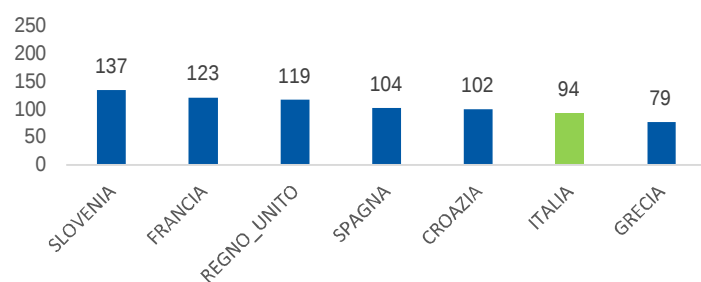
Average price on weekend of 17-19 June, booked on 13 June - B&B room for two
Product: MOUNTAINS



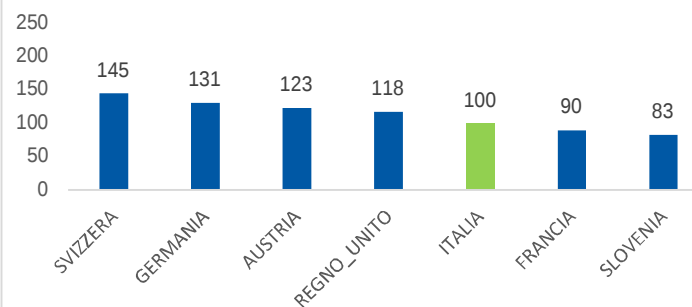
Average price on weekend of 17-19 June, booked on 13 June - B&B room for two
Product: SPA



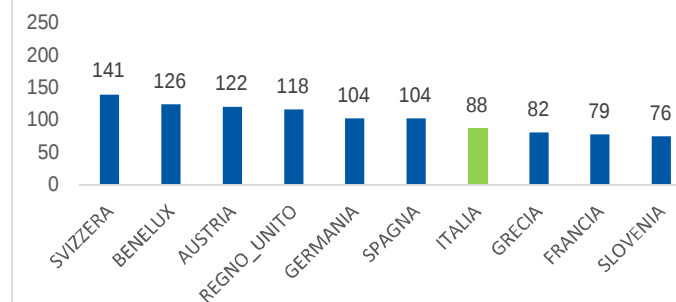
Average price on weekend of 17-19 June, booked on 13 June - B&B room for two
Product: BEACH



Average price on weekend of 17-19 June, booked on 13 June - B&B room for two
Product: LAKE



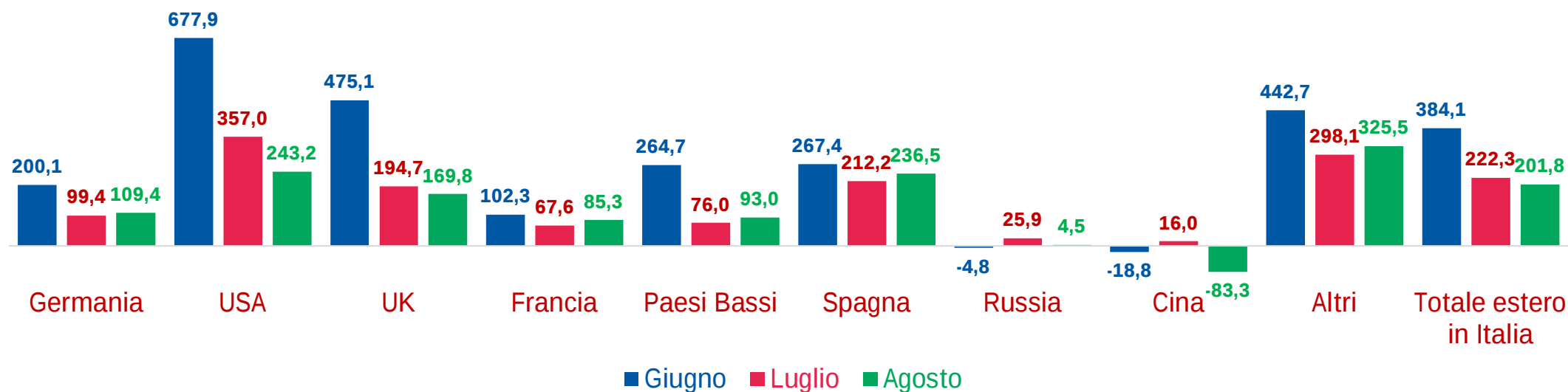
Average price on weekend of 17-19 June, booked on 13 June - B&B room for two
Product: FOOD AND WINE



Source: ENIT Research Department using Remtene data

International flight bookings Summer 2022

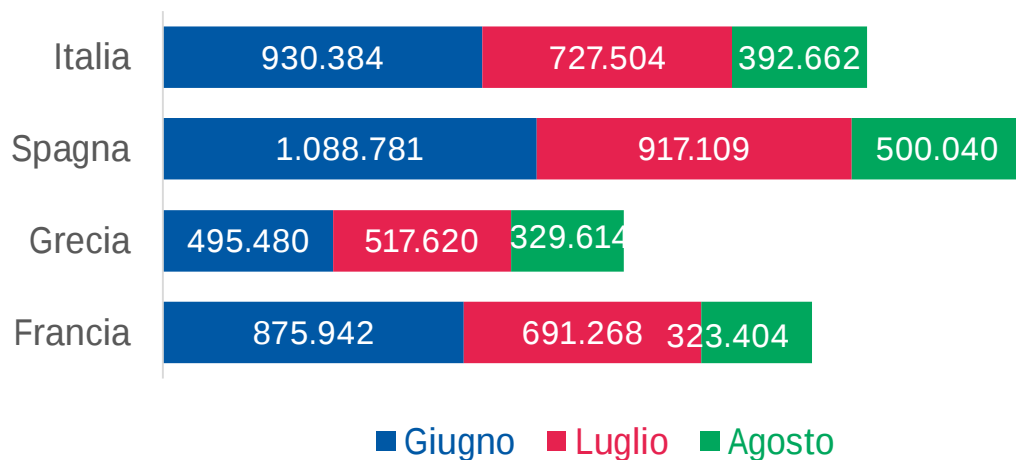
Bookings of flights to Italy by country of origin
Var. % 2022/2021, as of 16/06/2022



Overall, **bookings for flights from other countries to Italy are currently up on 2021 by +384.1% in June, +222.3% in July and +201.8% in August.**

International flight bookings Summer 2022

Flight bookings on 16/06/2022
Total international flights to Italy and competitors



Total international flight bookings, Italy and competitors
Var. % 2022/2021, as of 16/06/2022

Destination	June	July	August
Italy	384.1%	222.3%	201.8%
Spain	183.8%	127.3%	115.0%
Greece	132.6%	77.2%	70.5%
France	389.6%	226.0%	254.9%

All of the bookings of flights to Italy that were analysed are up on 2021.

International flight bookings

Summer 2022

Total international flight bookings, Italy and competitors
Var. % June 2022/2021 and 2022/2019, as of
16/06/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	384.1%	-27.6%
Spain	183.8%	-18.5%
Greece	132.6%	-0.4%
France	389.6%	-26.3%

Total flight bookings, Italy and competitors
Var. % July 2022/2021 and 2022/2019, as of
16/06/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	222.3%	-17.6%
Spain	127.3%	-9.1%
Greece	77.2%	13.0%
France	226.0%	-11.2%

Source: ENIT Research Department using Forward Data – updated on 05/06/2022