

ENIT BULLETIN

In-depth analysis of trends in tourism
June 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	
Southern Europe	100	Spain	100	London	100
Western Europe	55	USA	90	Paris	84
Western Asia	44	Italy	72	Dubai	71
North America	41	United Kingdom	63	New York	52
Northern Europe	37	France	62	Barcelona	48
South East Asia	26	Turkey	47	Amsterdam	47
South Asia	20	Greece	39	Lisbon	46
Central America	15	UAE	38	Istanbul	42
North Africa	15	Portugal	37	Rome	40
Caribbean	14	Germany	36	Denpasar	34

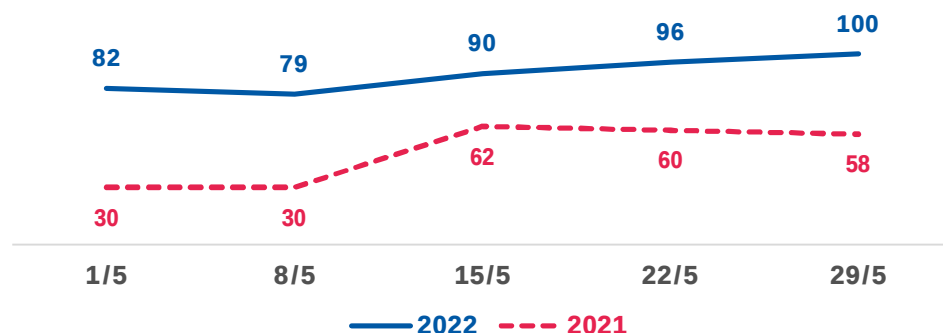
Destinations with the fastest growth in the world in terms of interest in travel

50%
Greece

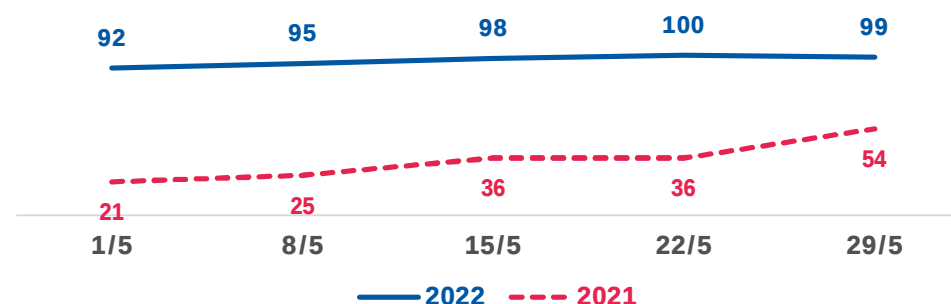
Source: ENIT Research Department using Google Destination Insights (for the period from 01/05/22 to 02/06/22, as recorded on 09/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

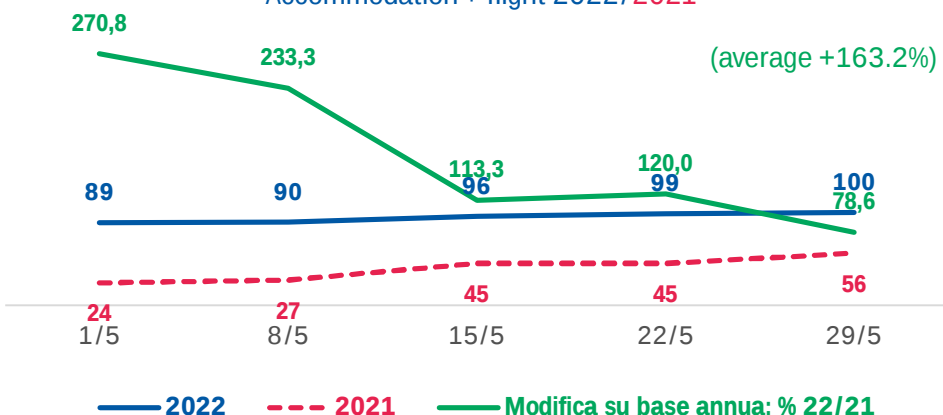
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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

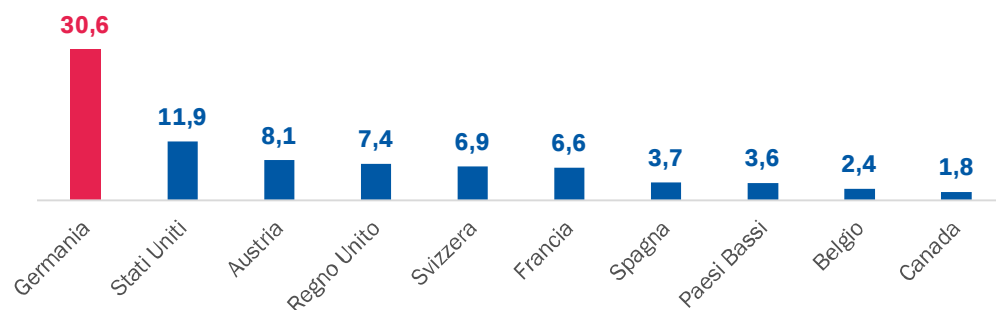


For the period analysed, the search data for travel to Italy shows that interest peaked on 29 May. Comparison with the same dates from 2021 shows that the greatest variation (in %) was on 1 May (+270.8%).

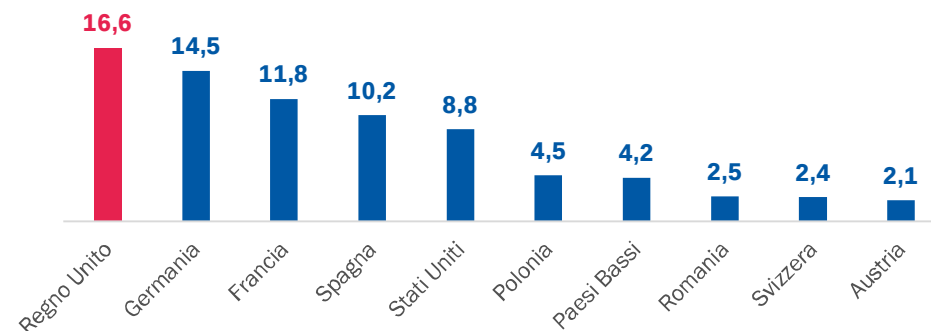
Source: ENIT Research Department using Google Destination Insights (for the period from 01/05/22 to 02/06/22, as recorded on 09/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

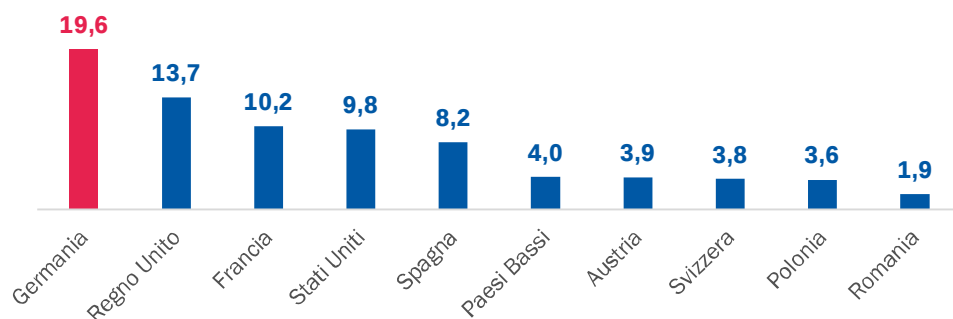
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

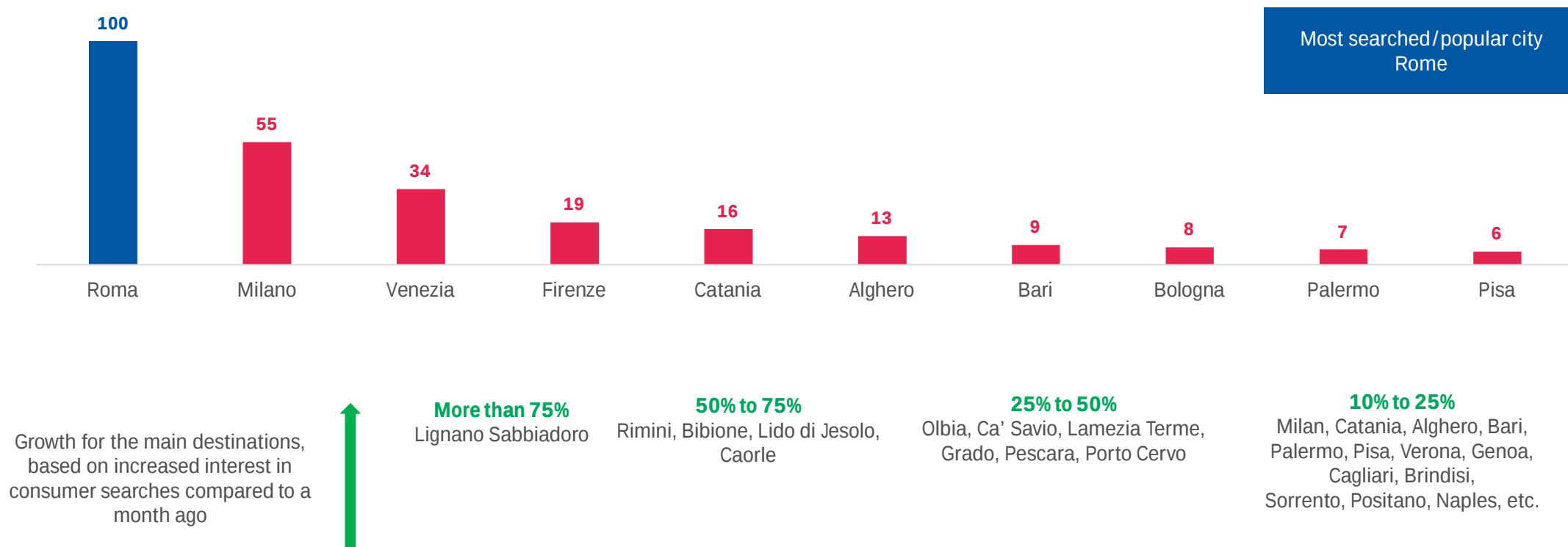


Country with greatest
interest in incoming
travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 01/05/22 to 02/06/22, as recorded on 09/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

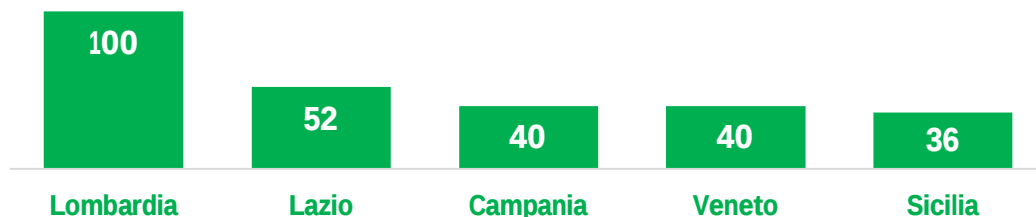
Volume of interest Main destination cities: Flight + accommodation



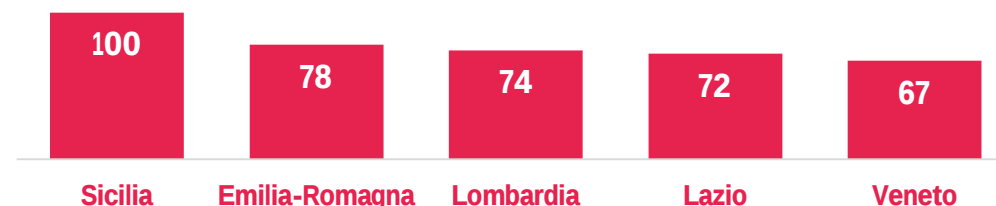
Source: ENIT Research Department using Google Destination Insights (for the period from 01/05/22 to 02/06/22, as recorded on 09/06/22) – All data is indexed

Searches on Google in Italy for travel in Italy

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



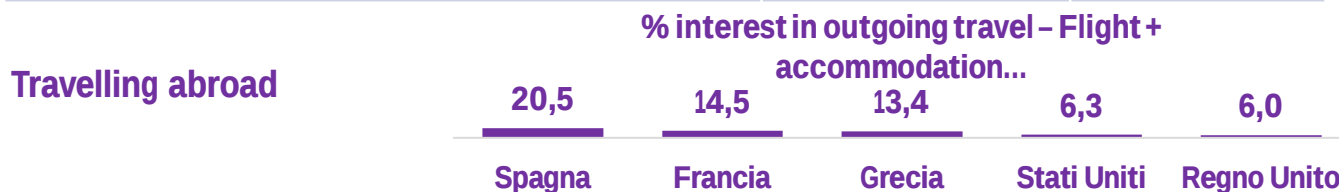
TOP 5 destination regions
in terms of volume of interest – Flight + accommodation



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, Vieste, Caorle, Bibione, Chioggia, Jesolo	Olbia, Alghero, Brindisi, Lamezia Terme, Trapani, Reggio Calabria, Ancona, Syracuse	Catania, Palermo, Cagliari, Bari, Trieste, Reggio Calabria, Pescara, Sorrento
50% to 75%		
Rimini, Riccione, Cervia, Cesenatico, Cattolica, Igea Marina, Pantelleria, Forio, Lignano Sabbiadoro, Ischia, San Benedetto del Tronto, Senigallia, Torre San Giovanni, Castiglione della Pescaia, etc.		

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

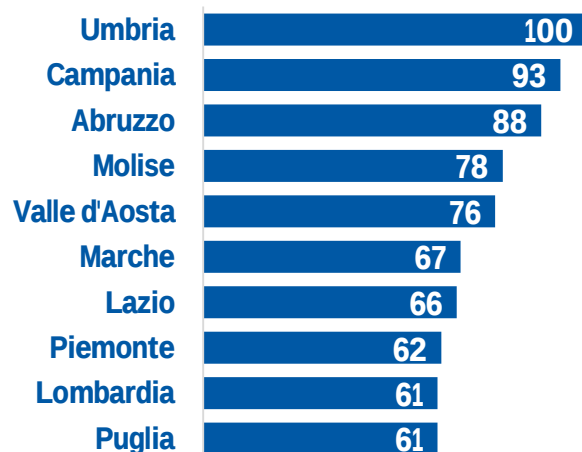


Source: ENIT Research Department using Google Destination Insights (for the period from 01/05/22 to 02/06/22, as recorded on 09/06/22) – All data is indexed

Google searches for Italy – Holidays

Holiday searches

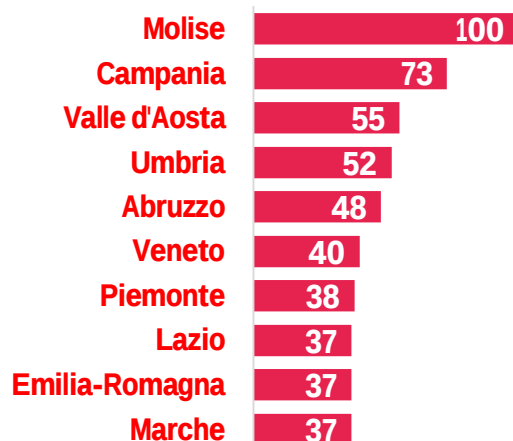
Travel category: interest by region



Holiday searches

Travel category: tourist destinations

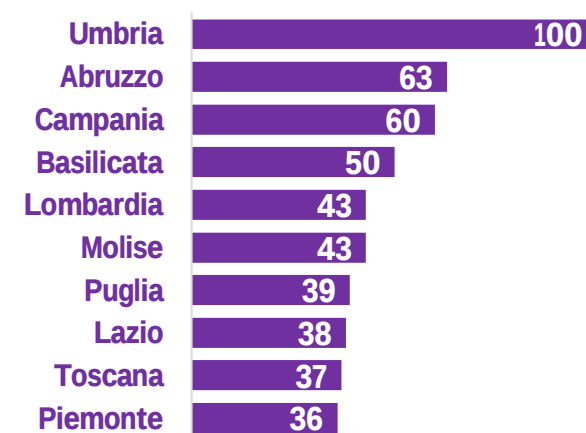
Interest by region



Holiday searches

Travel category: hotels and accommodation

Interest by region



Among the correlated subjects for holidays – travel/tourist destinations

Increasing

Accommodation facility: extended-stay hotel +100%; village +50%
Place/municipality/region/city: Roseto degli Abruzzi +450%; Liguria +180%;
 Puglia +70%
Airline: EasyJet +100%
Time: week +190%
Month: August +160%
In other countries: Egypt +110%

Most searched

Subject: holiday, home, flight, travel, cost, summer, Skyscanner
Accommodation facility: holiday home, apartment
Place/region/municipality: Salento, Puglia, Gallipoli, Liguria, Abruzzo
Month: August, June, July
In other countries: Croatia, Egypt

Source: ENIT Research Department using Google Trends data on 10/06/2022 – Last 30 days

Accommodation bookings through OTAs

Spring / Summer 2022 (compared with 2021)

% occupancy of accommodation
in OTA channels on 10/06/2022

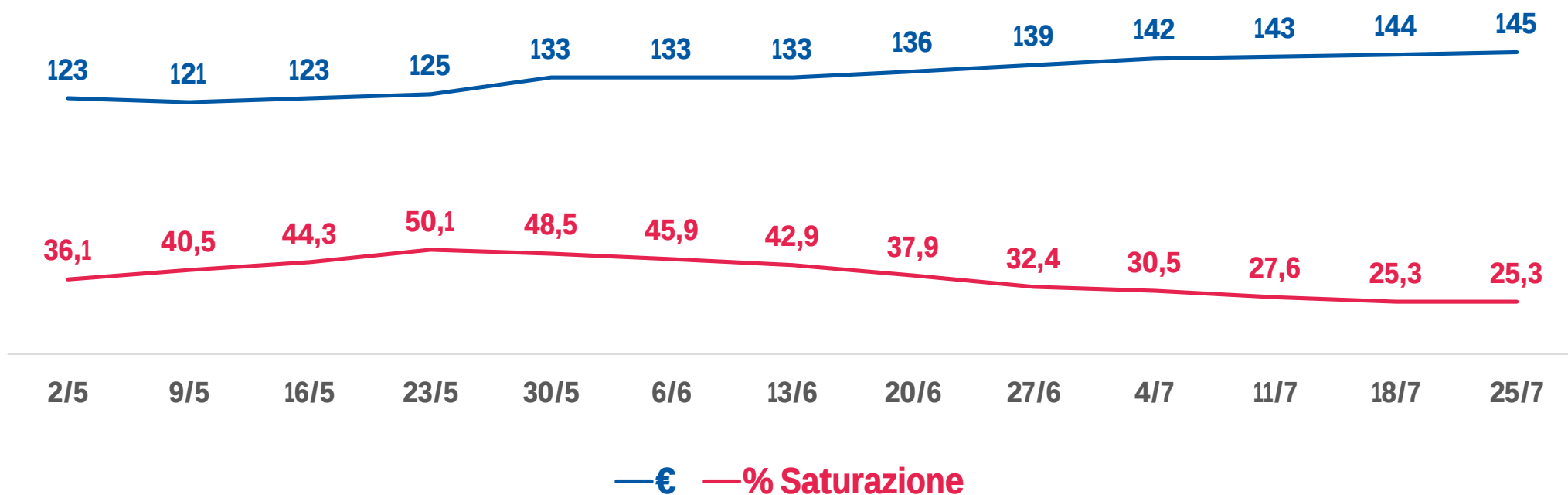
Product	May		June		July	
	2022	2021	2022	2021	2022	2021
Total for Italy	41.9	30.0	43.0	24.2	27.3	30.1
Mountains	37.0	32.5	31.7	20.4	29.9	29.3
Art and culture	49.6	26.4	48.0	23.0	25.1	26.3
Beach	34.0	41.3	41.8	28.2	33.9	39.4
Lake	38.0	34.7	51.1	27.8	38.6	41.1
Spa	33.2	34.6	34.7	24.8	26.8	29.6
Other	34.5	18.8	30.4	18.4	15.9	21.1

Bookings for accommodation facilities through Online Travel Agencies reached 41.9% of the capacity for the month of May, which is approximately 12 percentage points more than last year. "Cultural" bookings (49.6%) are above the national average and have made up ground compared to 2021 (+23.2%).

At present, bookings cover 43.0% of the capacity for June. The highest figures and biggest increases concern lakes (51.1% and +23%) and artistic and cultural towns and cities (48% and +25%). The occupancy rate for the month of July stands at 27.3%. Leading the drive on this front are bookings for lakes (38.6%), beach resorts (33.9%) and the mountains (29.9%).

Accommodation bookings through OTAs Spring / Summer 2022

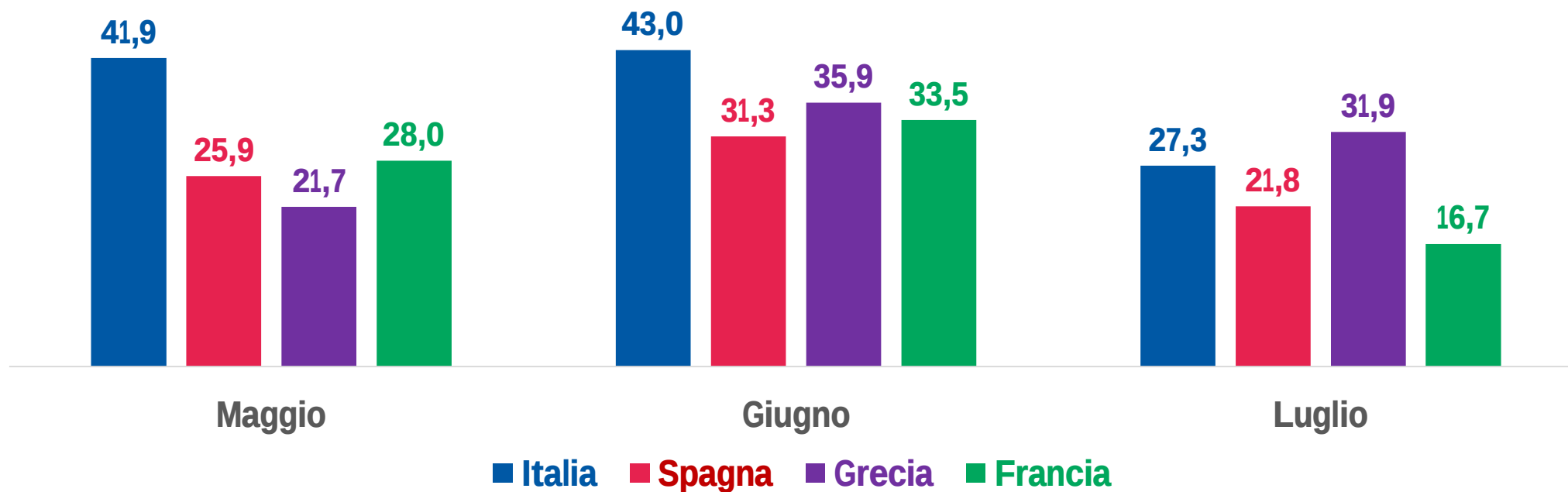
Average price and % occupancy for accommodation facilities in Italy
booked through OTAs, as of 10/06/2022 - Weekly data



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs Spring / Summer 2022

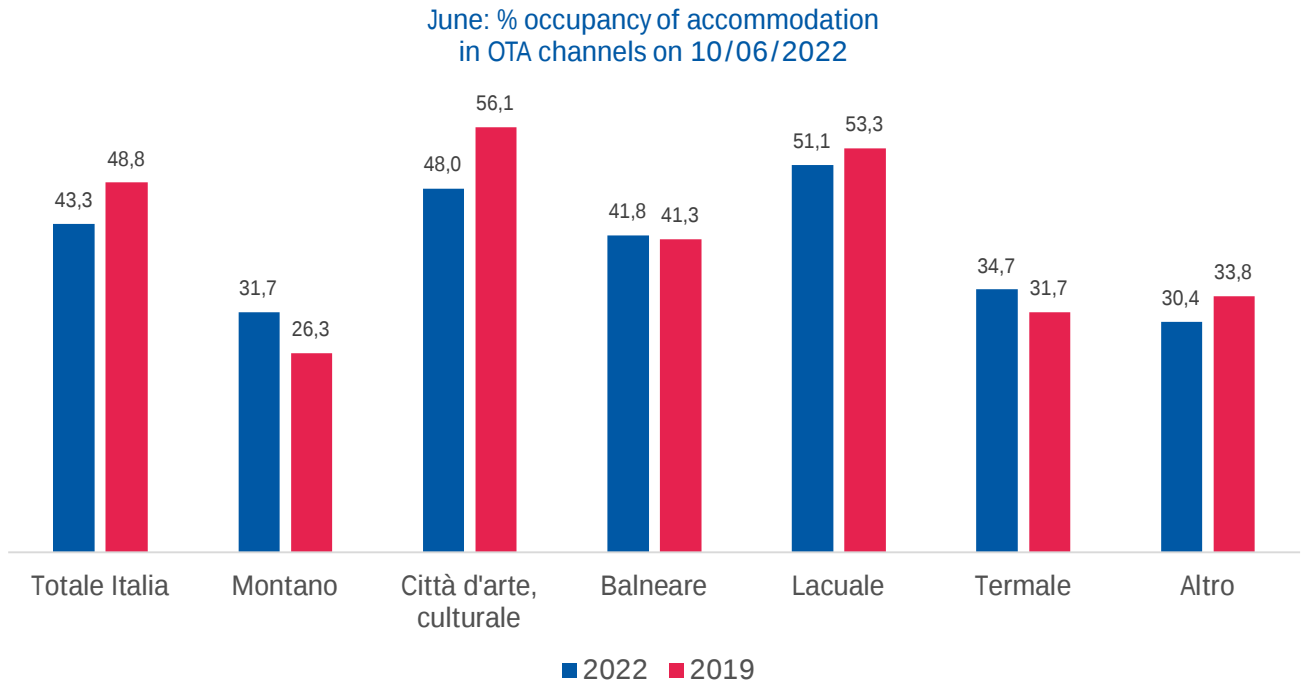
% occupancy of accommodation
in OTA channels on 10/06/2022 - Italy and competitors



Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs

June 2022/2019



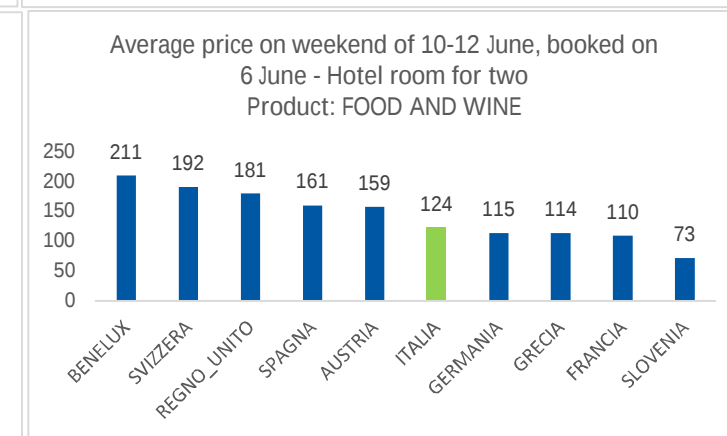
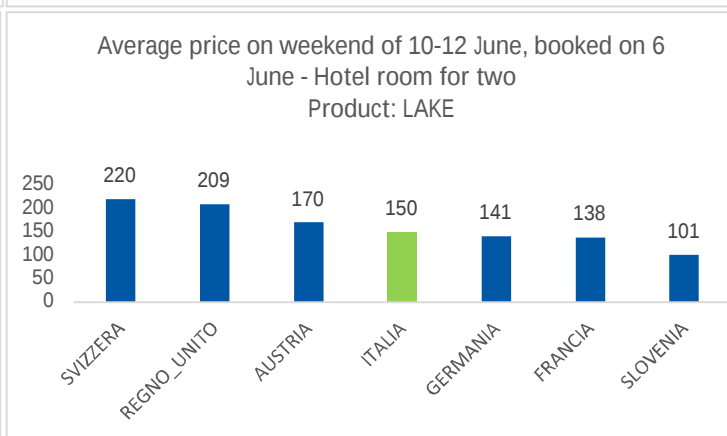
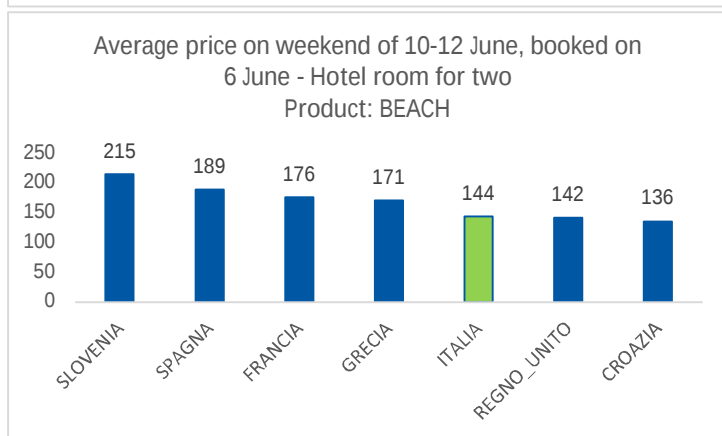
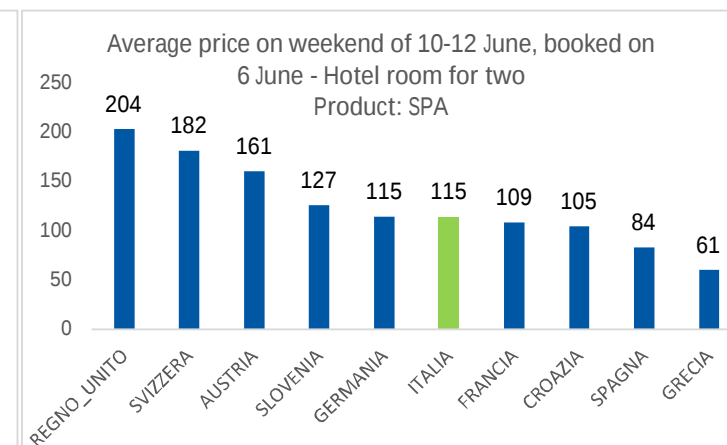
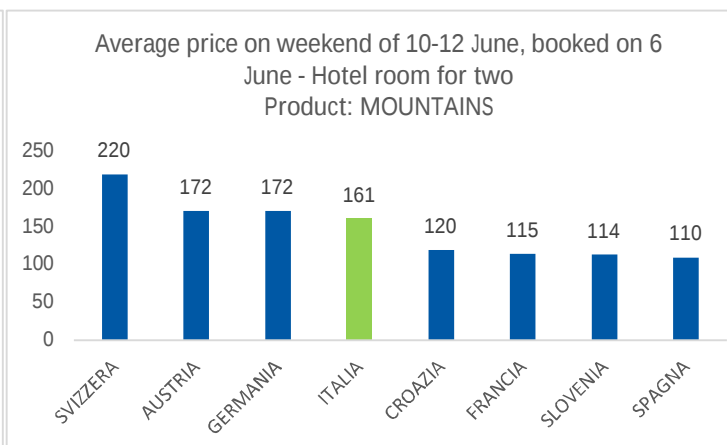
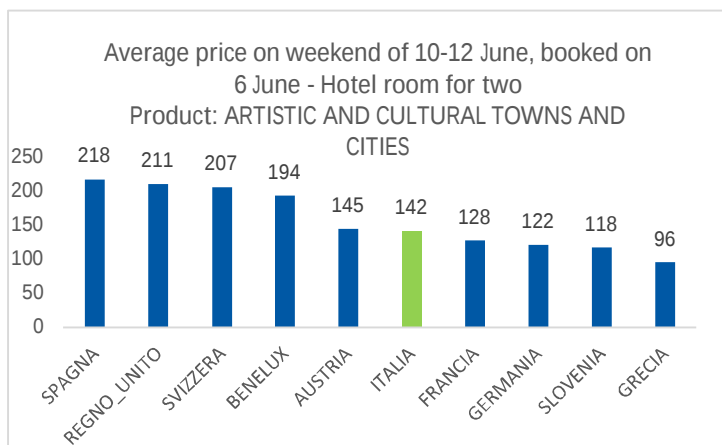
At present, overall bookings for June are down by 5.5 percentage points on 2019. Ground has been made up by bookings for the mountains (+5.4), spas (+3.0) and beach resorts (+0.5).

Source: ENIT Research Department using The Data Appeal Company data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

2ND WEEKEND IN JUNE

HOTEL



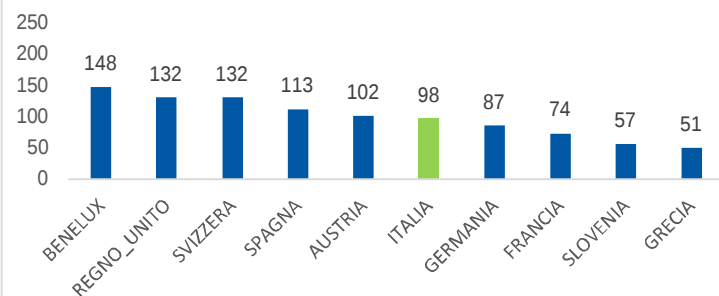
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

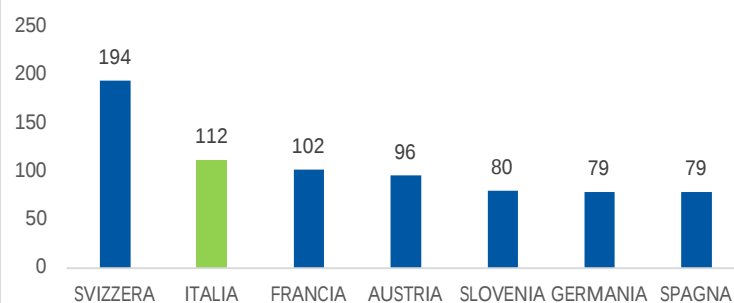
2ND WEEKEND IN JUNE

GUEST HOUSES

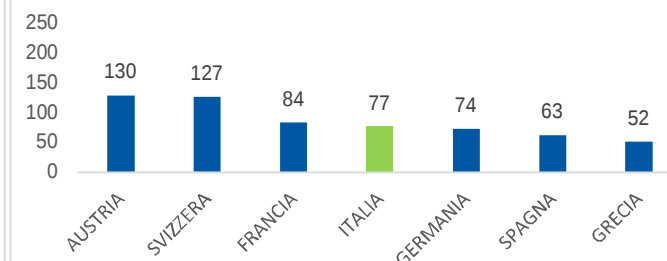
Average price on weekend of 10-12 June, booked on 6 June - Guest house room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



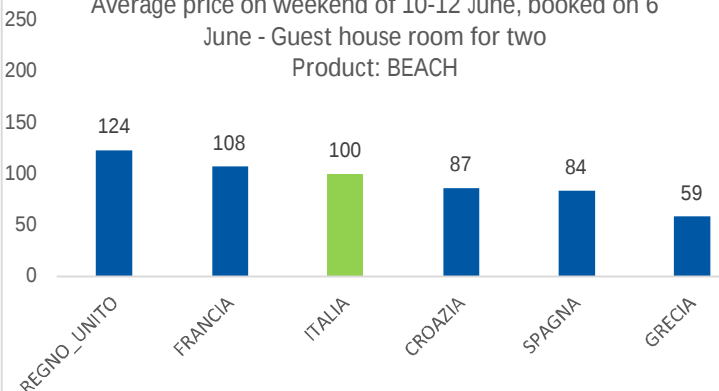
Average price on weekend of 10-12 June, booked on 6 June - Guest house room for two
Product: MOUNTAINS



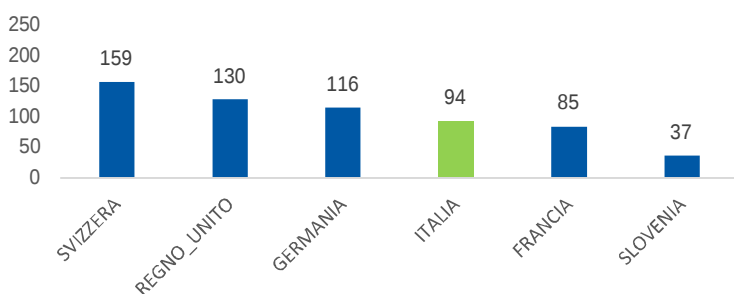
Average price on weekend of 10-12 June, booked on 6 June - Guest house room for two
Product: SPA



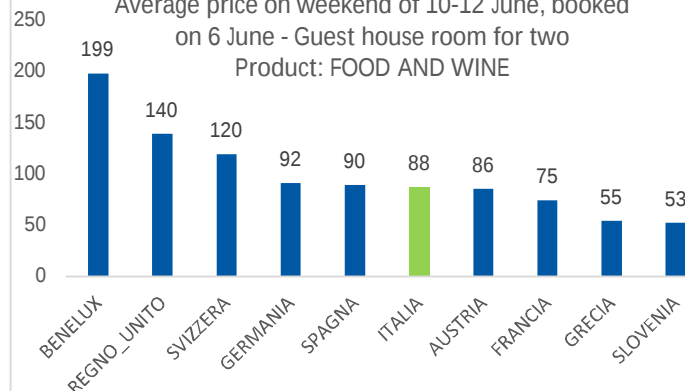
Average price on weekend of 10-12 June, booked on 6 June - Guest house room for two
Product: BEACH



Average price on weekend of 10-12 June, booked on 6 June - Guest house room for two
Product: LAKE



Average price on weekend of 10-12 June, booked on 6 June - Guest house room for two
Product: FOOD AND WINE



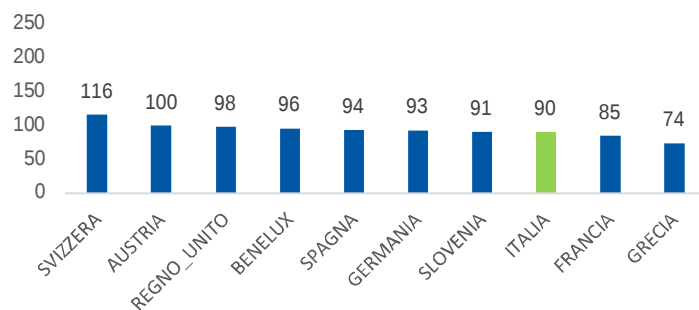
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

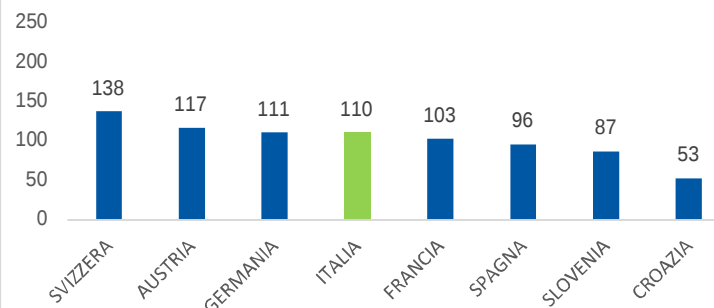
2ND WEEKEND IN JUNE

B&Bs

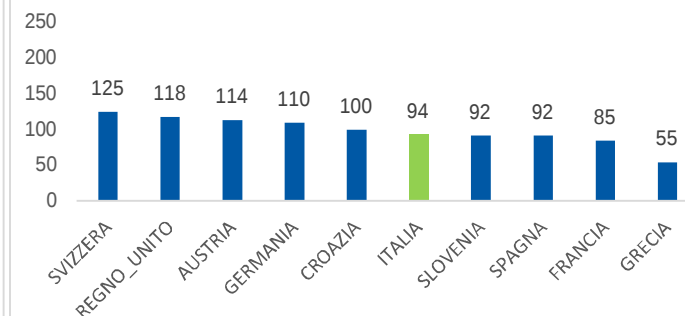
Average price on weekend of 10-12 June, booked on 6 June - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



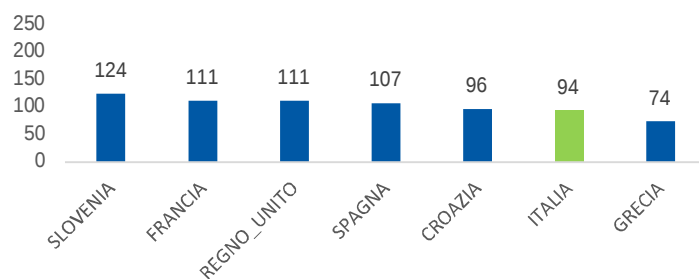
Average price on weekend of 10-12 June, booked on 6 June - B&B room for two
Product: MOUNTAINS



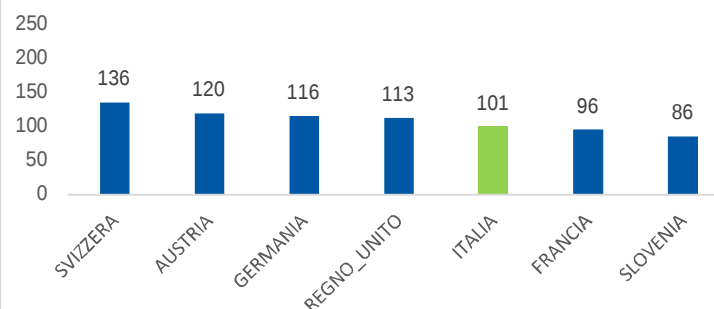
Average price on weekend of 10-12 June, booked on 6 June - B&B room for two
Product: SPA



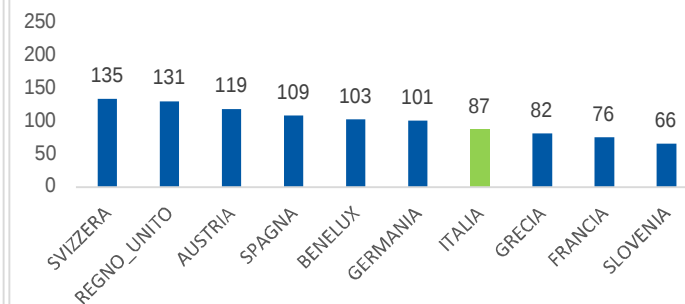
Average price on weekend of 10-12 June, booked on 6 June - B&B room for two
Product: BEACH



Average price on weekend of 10-12 June, booked on 6 June - B&B room for two
Product: LAKE



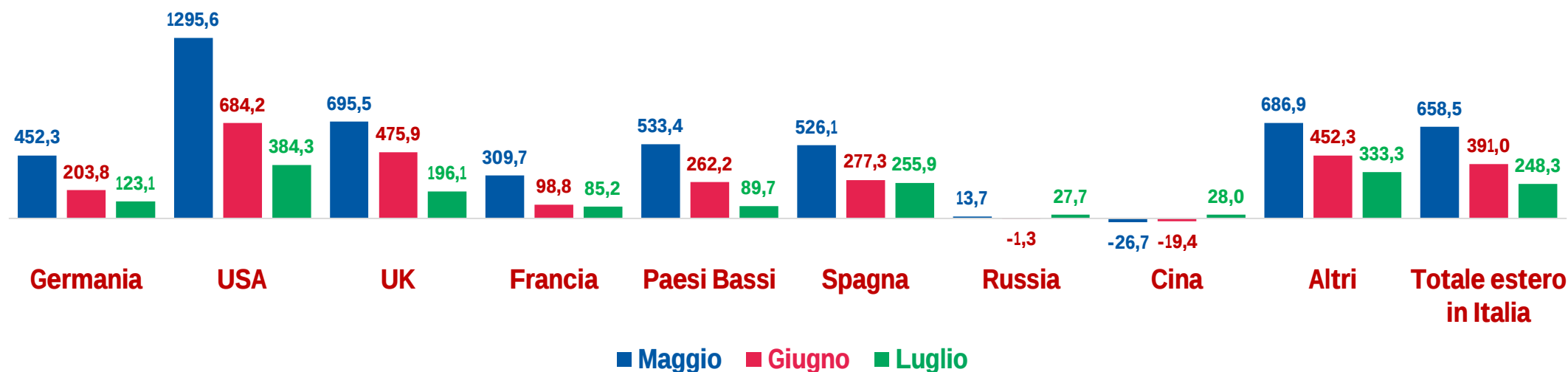
Average price on weekend of 10-12 June, booked on 6 June - B&B room for two
Product: FOOD AND WINE



Source: ENIT Research Department using Remtene data

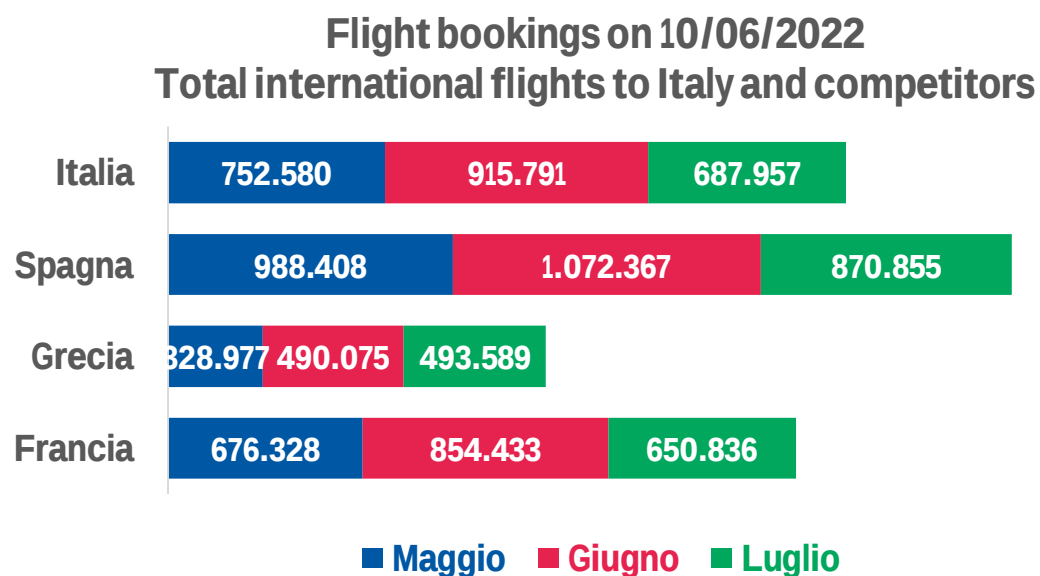
INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022

Bookings of flights to Italy by country of origin
Var. % 2022/2021 as of
10/06/2022



Overall, **bookings for flights from other countries to Italy are currently up on 2021 by +658.5% in May, +391.0% in June and +248.3% in July.** The **United States** are leading the way (May +1295.6%; June +684.2%).

INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022



Total international flight bookings, Italy and competitors Var. % 2022/2021, as of 10/06/2022

Destination	May	June	July
Italy	658.5%	391.0%	248.3%
Spain	241.9%	186.0%	142.4%
Greece	300.9%	134.8%	86.7%
France	658.1%	392.2%	243.8%

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

INTERNATIONAL FLIGHT BOOKINGS

SPRING/SUMMER 2022

Total international flight bookings, Italy and competitors Var. % June 2022/2021 and 2022/2019, as of 10/06/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	391.0%	-28.2%
Spain	186.0%	-19.0%
Greece	134.8%	-0.6%
France	392.2%	-27.5%

Total flight bookings, Italy and competitors Var. % July 2022/2021 and 2022/2019, as of 10/06/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	248.3%	-18.1%
Spain	142.4%	-9.4%
Greece	86.7%	12.1%
France	243.8%	-11.4%

Source: ENIT Research Department using Forward Data – updated on 31/05/2022