

ENIT BULLETIN

In-depth analysis of trends in tourism

June 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 | |
| Southern Europe | 100 | Spain | 100 | London | 100 |
| Western Europe | 55 | USA | 91 | Paris | 86 |
| Western Asia | 43 | Italy | 71 | Dubai | 73 |
| North America | 41 | United Kingdom | 62 | New York | 53 |
| Northern Europe | 37 | France | 61 | Barcelona | 49 |
| South East Asia | 25 | Turkey | 45 | Lisbon | 48 |
| South Asia | 20 | UAE | 38 | Amsterdam | 48 |
| Central America | 16 | Greece | 38 | Rome | 42 |
| Caribbean | 15 | Portugal | 37 | Istanbul | 42 |
| North Africa | 14 | Germany | 35 | Denpasar | 34 |

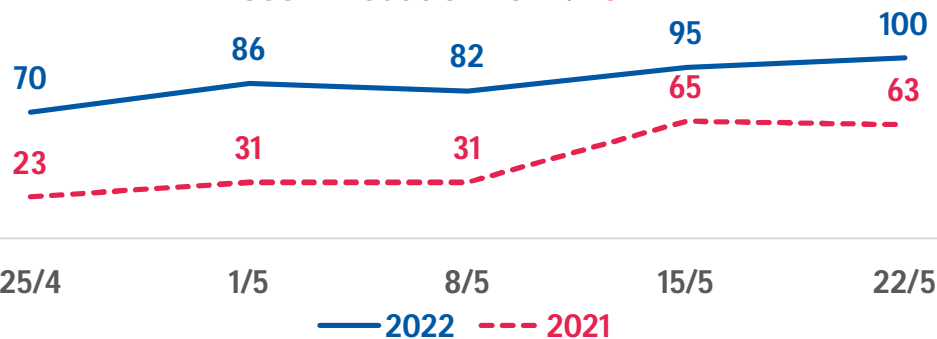
| Growth by destination city - Flight + accommodation | | |
|---|-----------------|---------------|
| 1 | Fort Lauderdale | More than 75% |
| 2 | Seville | 50% to 75% |
| 3 | Tirana | |
| 4 | Bangkok | 25% to 50% |
| 5 | Ibiza | |
| 6 | Casablanca | |
| 7 | Antalya | |
| 8 | Istanbul | 10% to 25% |
| 9 | Denpasar | |
| 10 | Singapore | |

Destinations with the fastest growth in the world in terms of interest in travel
More than 75%
Greece

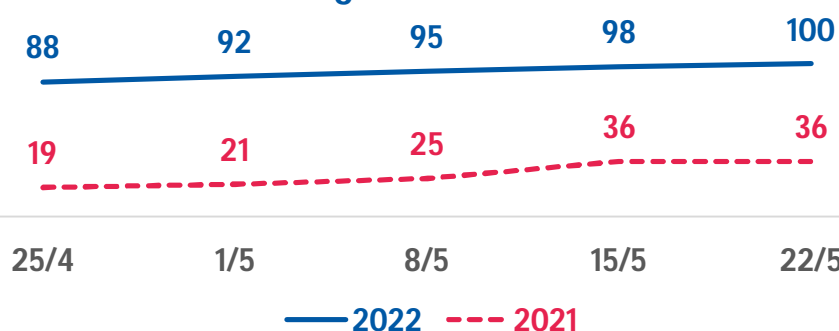
Source: ENIT Research Department using Google Destination Insights (for the period from 25/04/22 to 25/05/22, as recorded on 01/06/22) – All data is indexed

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

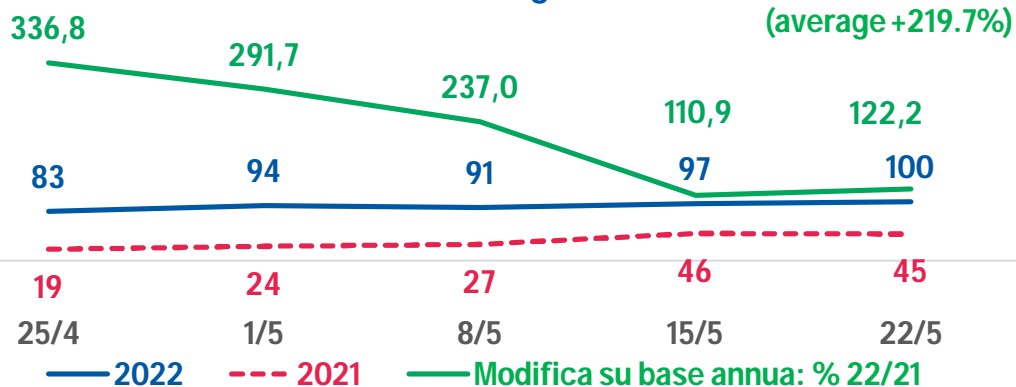
Search interest in travel to Italy Accommodation 2022/2021



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 22 May**. Comparison with the same dates from 2021 shows that **the greatest variation (in %) was on 25 April (+336.8%)**.

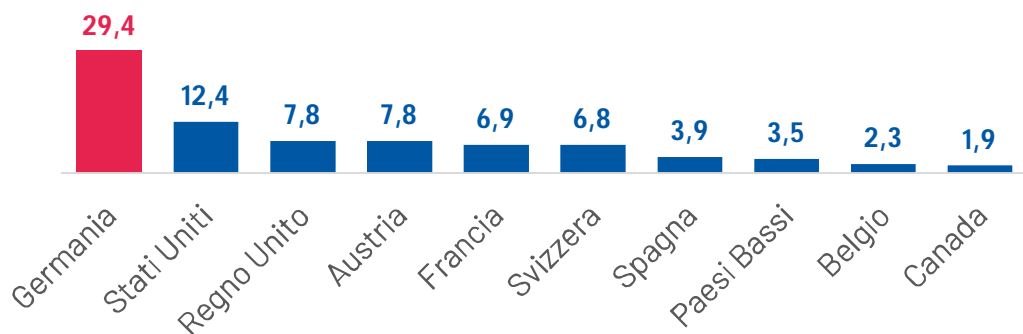
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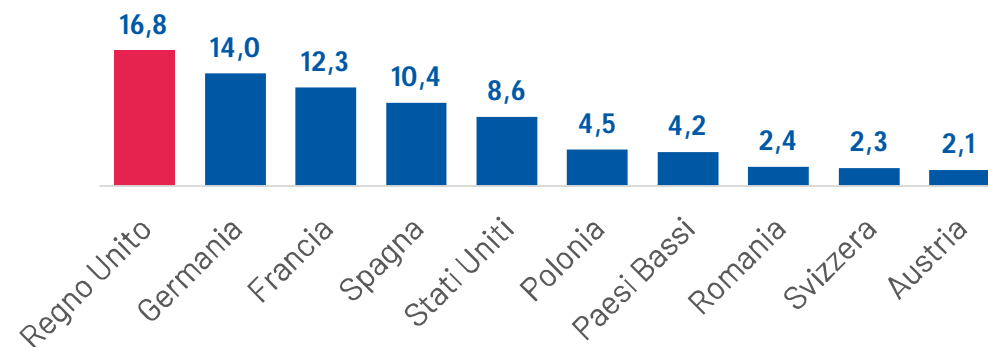
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Administrator; 30/01/2023

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

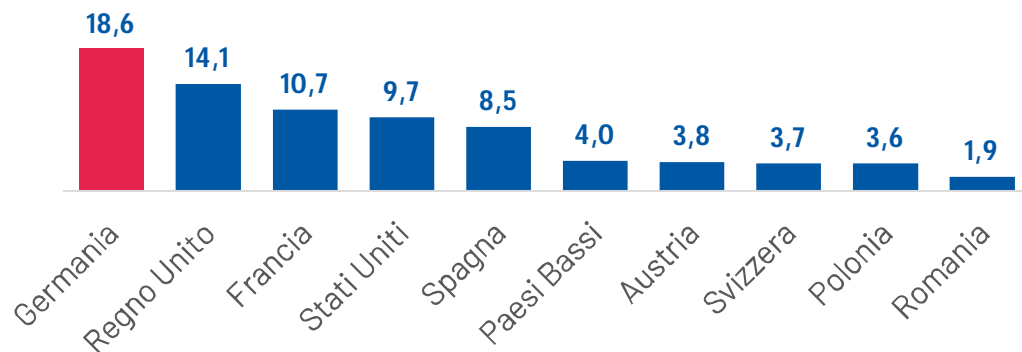
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)



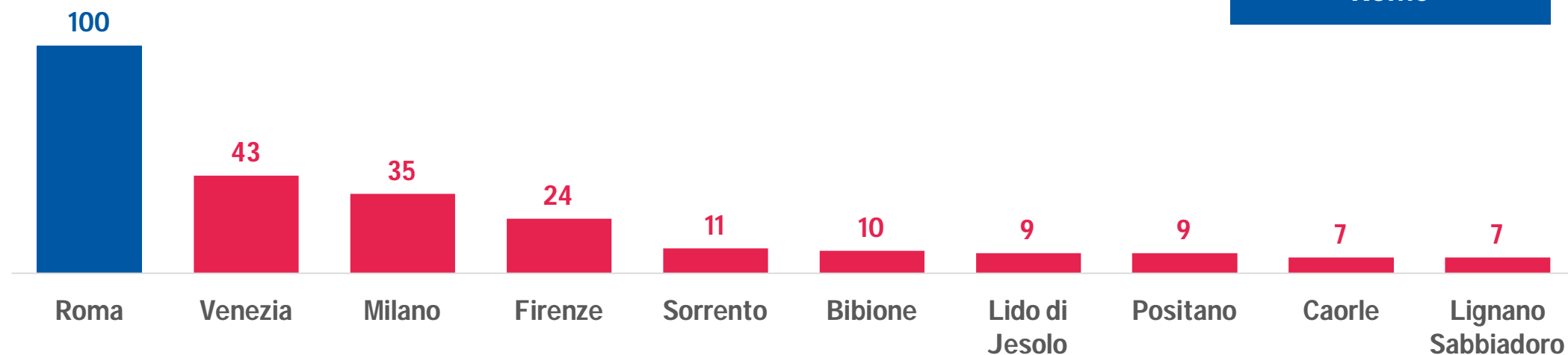
Country with greatest interest in incoming travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 25/04/22 to 25/05/22, as recorded on 01/06/22)
- 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%
Bibione, Lido di Jesolo, Caorle, Lignano Sabbiadoro, Rimini, Porto Cervo, Jesolo, Riccione

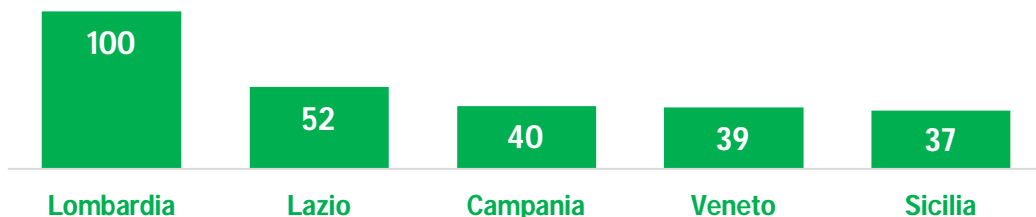
25% to 50%
Ca' Savio, Sorrento, Lacco Ameno, Grado, Portofino, Bari, Olbia, etc.

10% to 25%
Florence, Positano, Bardolino, Naples, Amalfi, Peschiera del Garda, Taormina, Palermo, Como, etc.

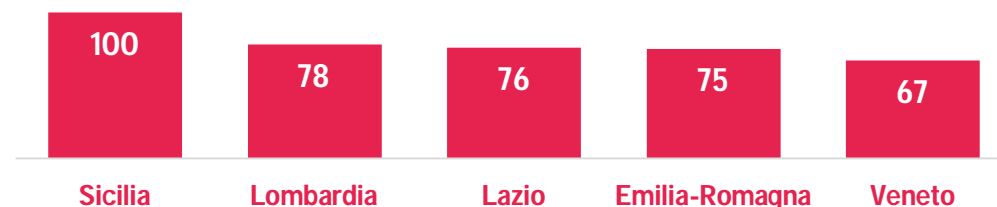
Source: ENIT Research Department using Google Destination Insights (for the period from 25/04/22 to 25/05/22, as recorded on 01/06/22)
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SEARCHES ON GOOGLE IN ITALY FOR TRAVEL IN ITALY

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

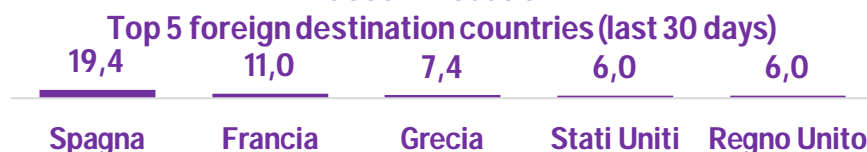
| More than 75% | 25% to 50% | 10% to 25% |
|---|--|---|
| Lidodi Jesolo, Vieste, Caorle, San Benedetto del Tronto, San Vito Lo Capo | Olbia, Alghero, Brindisi, Lamezia Terme, Trapani, Ancona, Syracuse | Catania, Palermo, Cagliari, Bari, Trieste, Reggio Calabria, Pescara, Sorrento, Crotone, Bolzano |
| Rimini, Riccione, Cervia, Cesenatico, Pantelleria, Igea Marina, Lignano Sabbiadoro, Bibione, Senigallia, Torre San Giovanni, Chioggia | | |

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



% interest in outgoing travel - Flight + accommodation

Travelling abroad

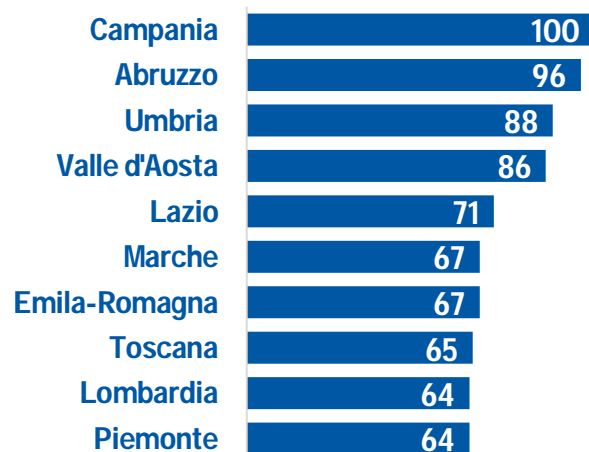


Source: ENIT Research Department using Google Destination Insights (for the period from 25/05/22 to 25/05/22, as recorded on 01/06/22)
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GOOGLE SEARCHES FOR ITALY – HOLIDAYS

Holiday searches

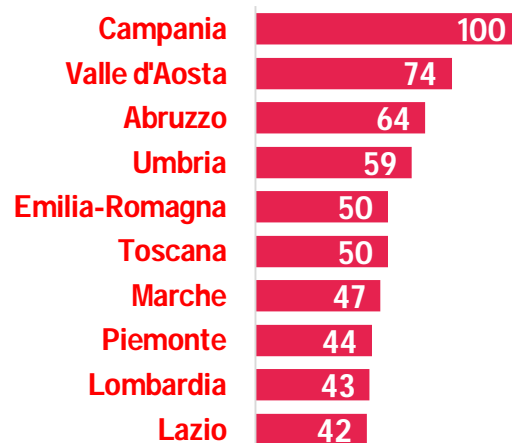
Travel category: interest by region



Holiday searches

Travel category: tourist destinations

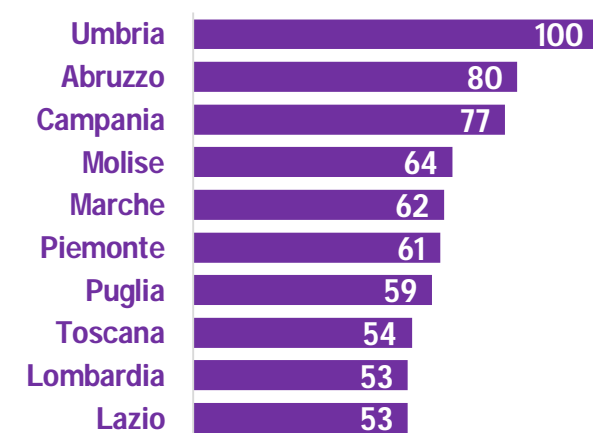
Interest by region



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 +400%; apartment +50%
Subject: climate +300%; summer +40%
Place/municipality/region/city: Campania +100%; Santa Maria di Castellabate +170%; San Vito Lo Capo +150%; Salento +90%; Palinuro +80%
Airline: EasyJet +100%
Time: week +190%
Month: June +60%
In other countries: Lanzarote, Barcelona upsurge; Croatia +250%; Zanzibar +80%

Most searched

Subject: holiday, home, flight, travel, cost, summer, Skyscanner
Accommodation facility: holiday home, apartment
Place/region/municipality: Salento, Santa Maria di Castellabate, Palinuro
Month: August, June, July
In other countries: Zanzibar, Croatia

The values are calculated on a scale from 0 to 100, with 100 indicating the region with the highest search frequency in proportion with the total searches in that location

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022 (compared with 2021)

% occupancy of accommodation
in OTA channels on 01/06/2022

| Product | May | | June | | July | |
|------------------------|-------------|------|-------------|------|-------------|------|
| | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 |
| Total for Italy | 41.9 | 30.0 | 36.0 | 24.2 | 22.7 | 30.1 |
| Mountains | 37.0 | 32.5 | 27.1 | 20.4 | 26.7 | 29.3 |
| Art and culture | 49.6 | 26.3 | 40.0 | 23.0 | 20.5 | 26.3 |
| Beach | 34.0 | 41.3 | 35.5 | 28.2 | 28.6 | 39.4 |
| Lake | 38.0 | 34.7 | 44.7 | 27.8 | 33.1 | 41.1 |
| Spa | 33.3 | 34.6 | 29.4 | 24.8 | 22.5 | 29.6 |
| Other | 34.6 | 18.8 | 23.3 | 18.4 | 13.2 | 21.1 |

Bookings for accommodation facilities through Online Travel Agencies stand at 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 (+23.3%).

At present, bookings cover 36.0% of the capacity for June. The highest figures and biggest increases concern lakes (44.7% and +17%) and artistic and cultural towns and cities (40.0% and +17%). The occupancy rate for the month of July stands at 22.7%. Leading the drive on this front are bookings for lakes (33.1%), beach resorts (28.6%) and the mountains (26.7%).

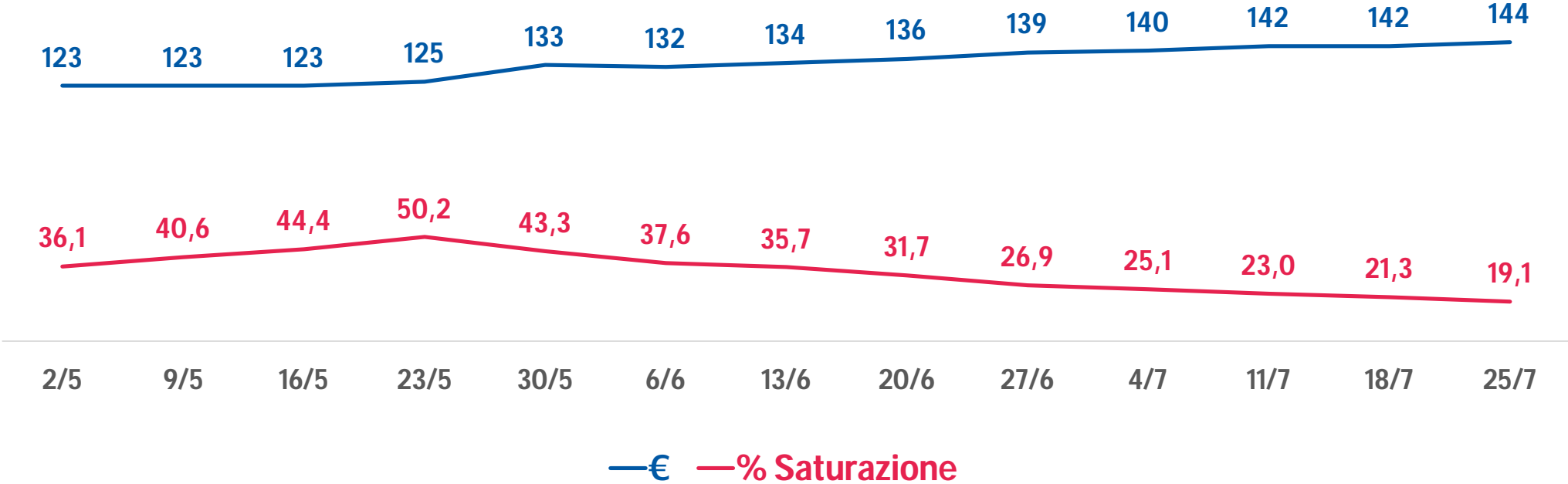
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Administrator; 30/01/2023

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

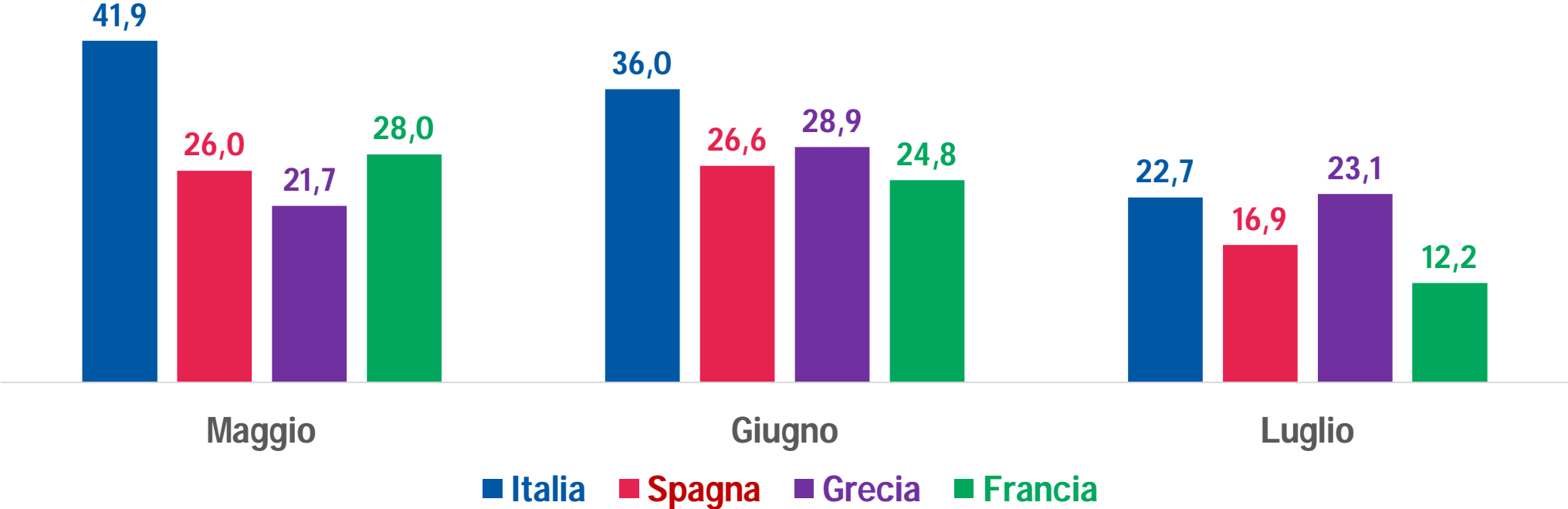
Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 01/06/2022 - Weekly data



Source: ENIT Research Department using The Data Appeal Company data

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

% occupancy of accommodation
in OTA channels on 01/06/2022 - Italy and competitors



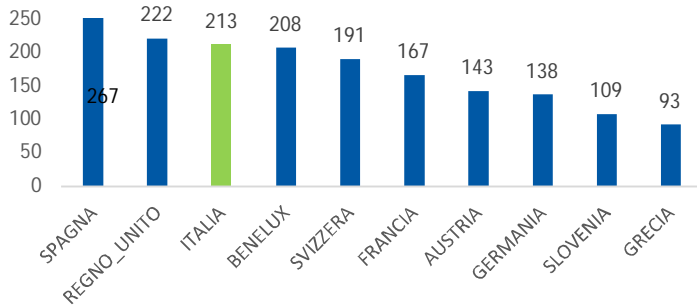
Source: ENIT Research Department using The Data Appeal Company data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

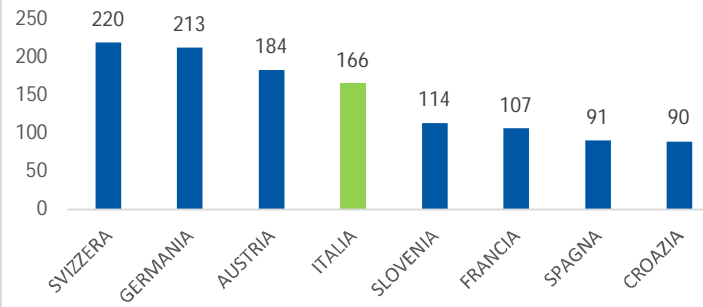
1ST WEEKEND IN JUNE

HOTEL

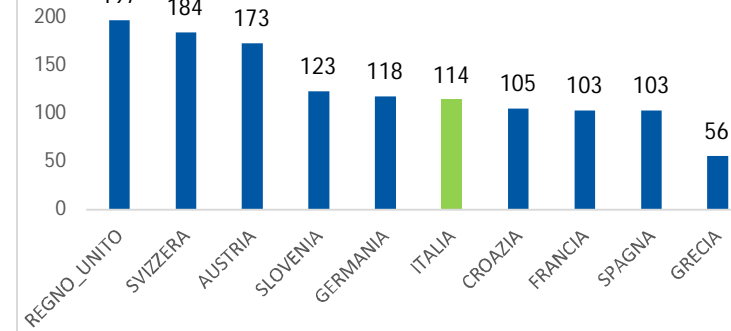
Average price on weekend of 3-5 June, booked on 30 May - Hotel room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



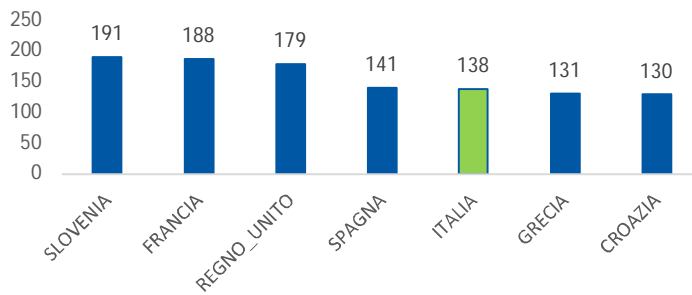
Average price on weekend of 3-5 June, booked on 30 May - Hotel room for two
Product: MOUNTAINS



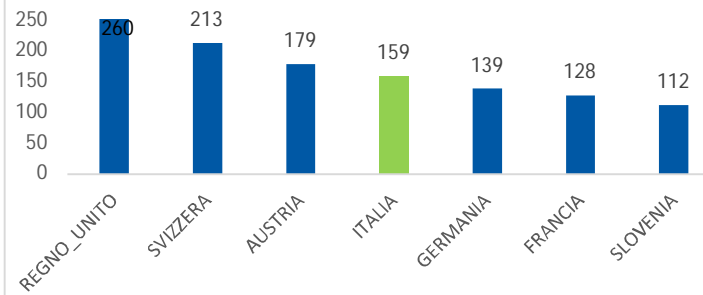
Average price on weekend of 3-5 June, booked on 30 May - Hotel room for two
Product: SPA



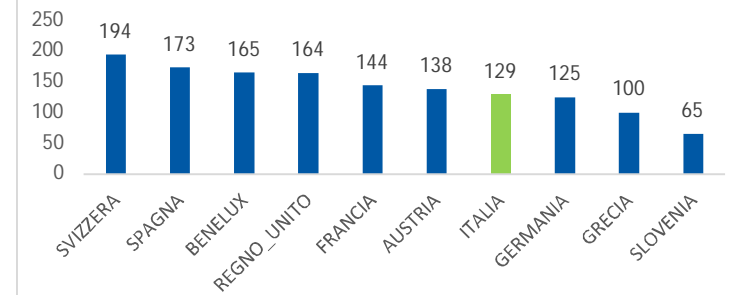
Average price on weekend of 3-5 June, booked on 30 May - Hotel room for two
Product: BEACH



Average price on weekend of 3-5 June, booked on 30 May - Hotel room for two
Product: LAKE



Average price on weekend of 3-5 June, booked on 30 May - Hotel room for two
Product: FOOD AND WINE



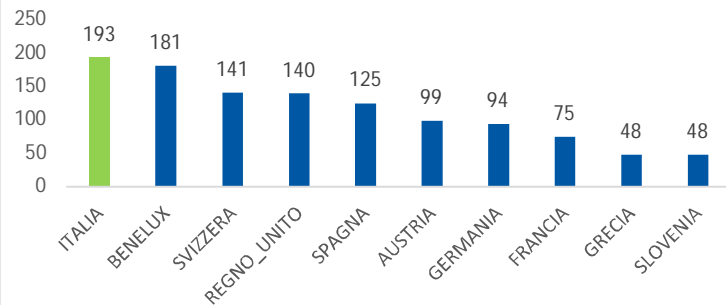
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

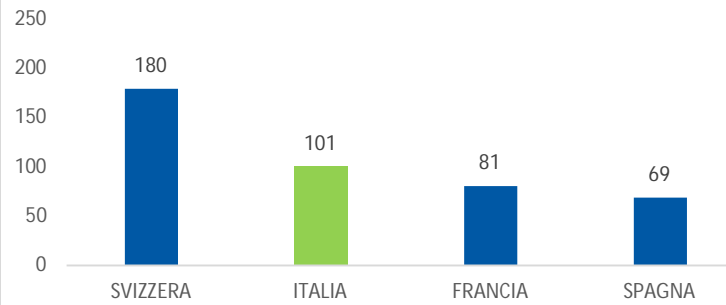
1ST WEEKEND IN JUNE

GUEST

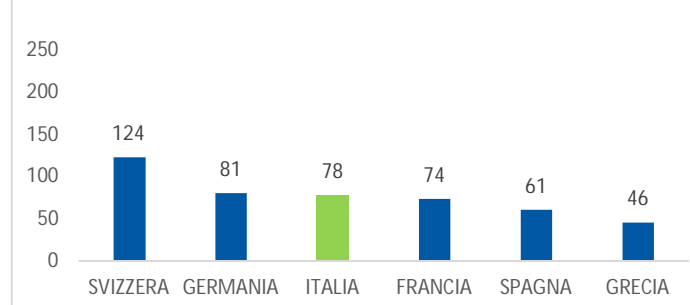
Average price on weekend of 3-5 June, booked on 30 May - Guest house room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



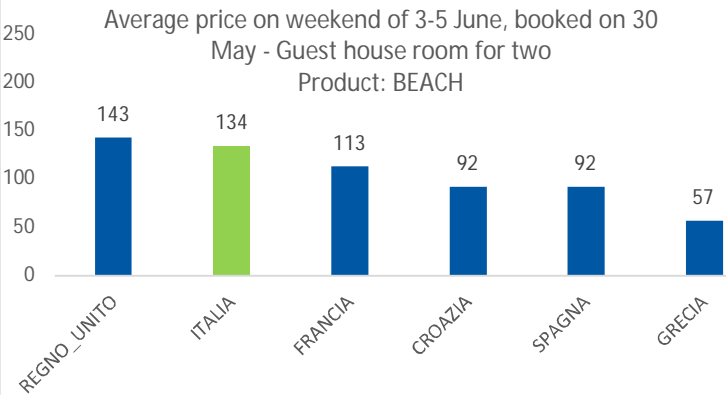
Average price on weekend of 3-5 June, booked on 30 May - Guest house room for two
Product: MOUNTAINS



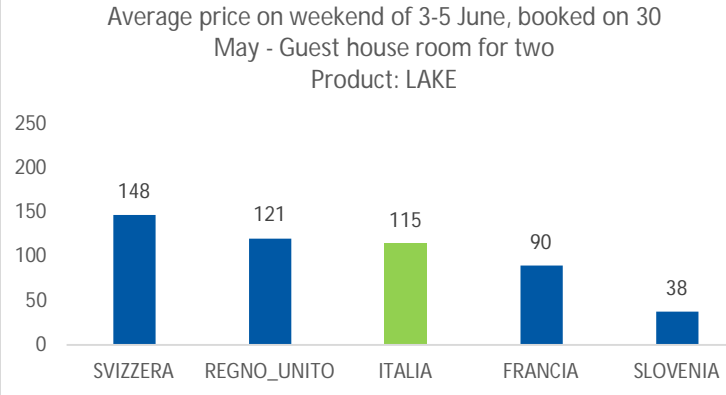
Average price on weekend of 3-5 June, booked on 30 May - Guest house room for two
Product: SPA



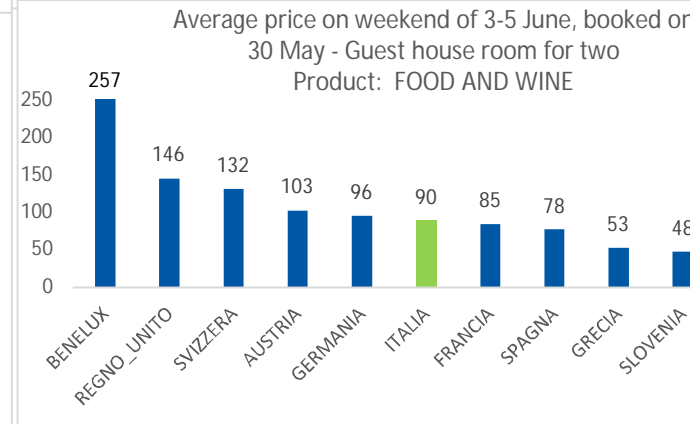
Average price on weekend of 3-5 June, booked on 30 May - Guest house room for two
Product: BEACH



Average price on weekend of 3-5 June, booked on 30 May - Guest house room for two
Product: LAKE



Average price on weekend of 3-5 June, booked on 30 May - Guest house room for two
Product: FOOD AND WINE



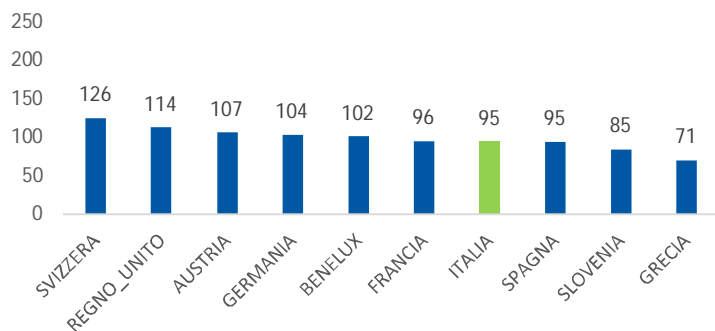
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

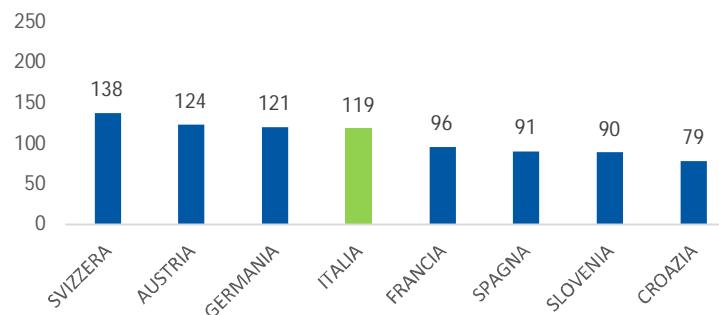
1ST WEEKEND IN JUNE

B&Bs

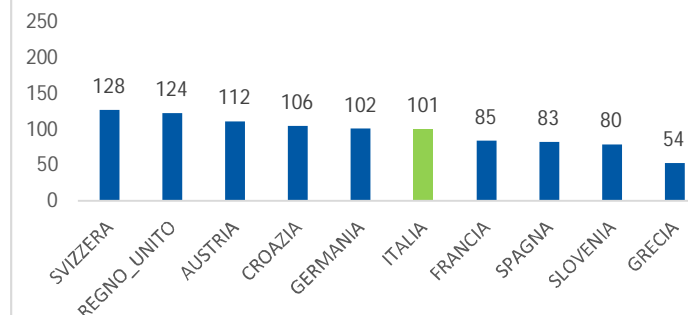
Average price on weekend of 3-5 June, booked on 30 May - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



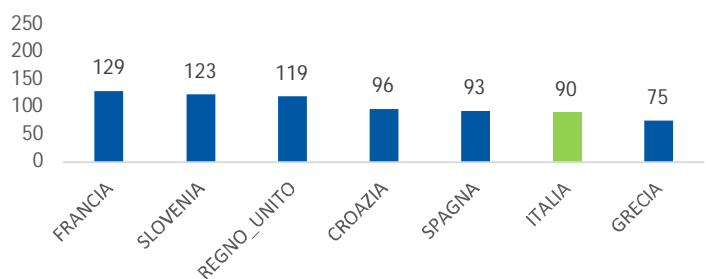
Average price on weekend of 3-5 June, booked on 30 May - B&B room for two
Product: MOUNTAINS



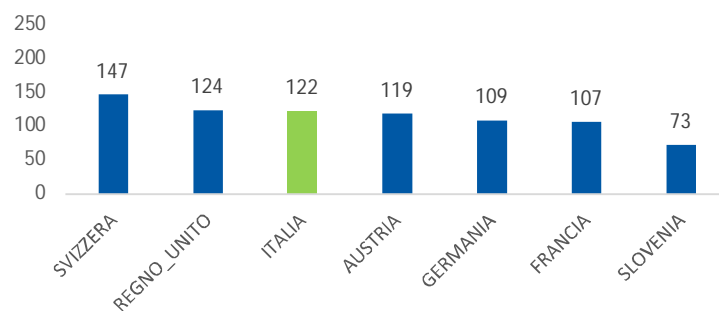
Average price on weekend of 3-5 June, booked on 30 May - B&B room for two
Product: SPA



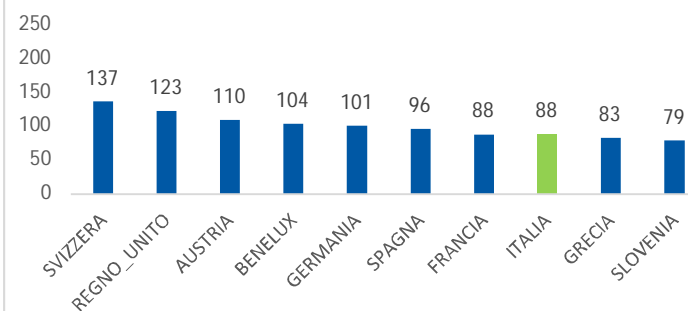
Average price on weekend of 3-5 June, booked on 30 May - B&B room for two
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Average price on weekend of 3-5 June, booked on 30 May - B&B room for two
Product: LAKE



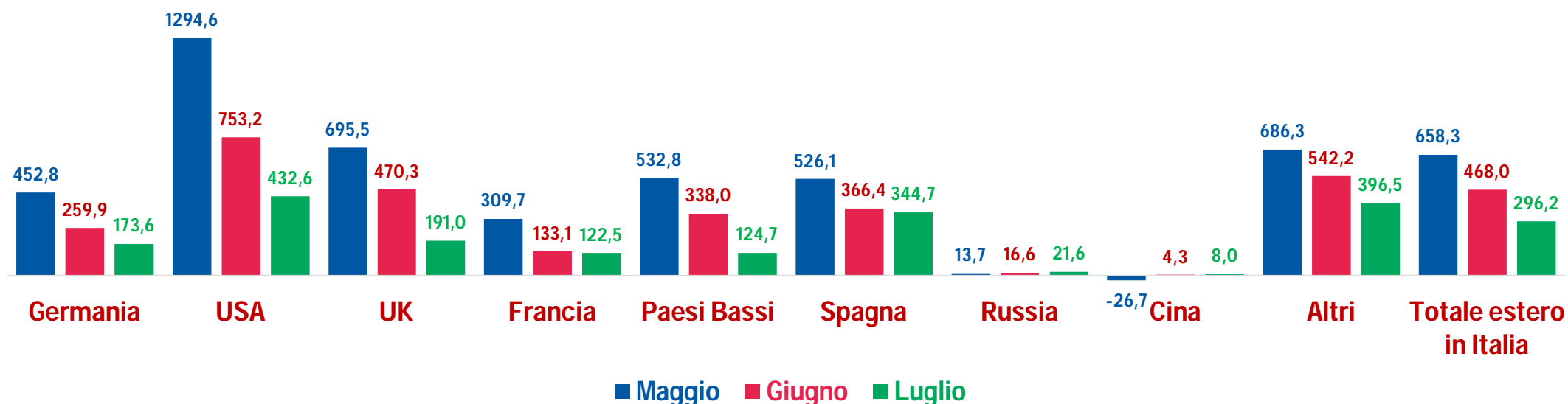
Average price on weekend of 3-5 June, booked on 30 May - B&B room for two
Product: FOOD AND WINE



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 01/06/2022

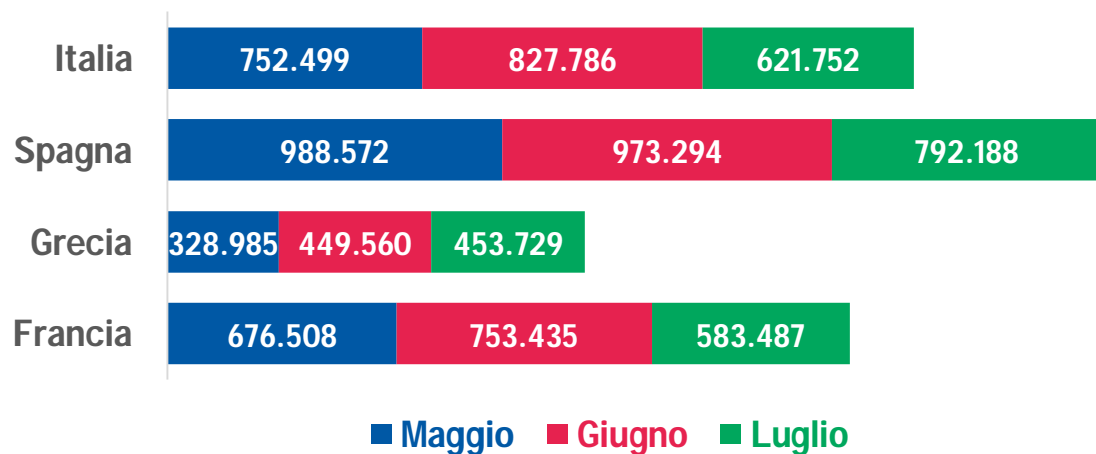


Overall, **bookings for flights from other countries to Italy are currently up on 2021 by 658.3% in May, 468.0% in June and 296.2% in July.** The **United States** are leading the way (May +1294.6%; June +753.2%).

INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022

Flight bookings on 01/06/2022

Total international flights to Italy and competitors



Total international flight bookings, Italy and competitors

Var. % 2022/2021, as of 01/06/2022

| Destination | May | June | July |
|-------------|--------|--------|--------|
| Italy | 658.3% | 468.0% | 296.2% |
| Spain | 241.9% | 218.2% | 169.3% |
| Greece | 300.9% | 156.9% | 103.8% |
| France | 657.8% | 445.4% | 273.8% |

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