

ENIT BULLETIN

In-depth analysis of trends in tourism

May W4

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	93	Paris	86
Western Asia	43	Italy	71	Dubai	74
North America	43	United Kingdom	62	New York	54
Northern Europe	37	France	61	Barcelona	50
South East Asia	25	Turkey	44	Lisbon	48
South Asia	21	UAE	39	Amsterdam	48
Central America	17	Portugal	38	Rome	42
Caribbean	16	Greece	36	Istanbul	42
North Africa	14	Germany	35	Denpasar	33

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

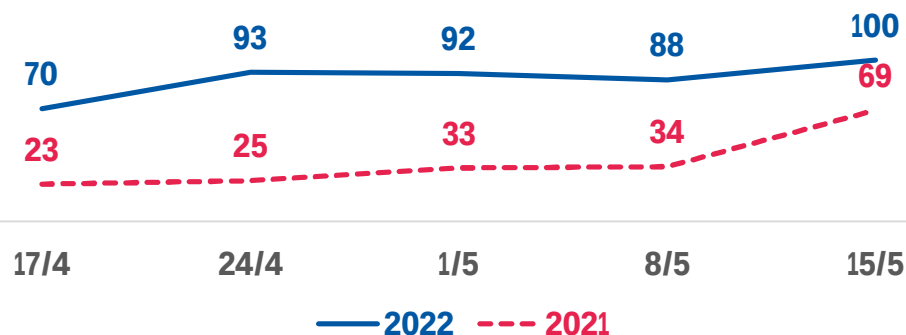
50%
Greece

Growth by destination city - Flight + accommodation		
1	Fort Lauderdale	More than 75%
2	Seville	
3	Palma de Mallorca	25% to 50%
4	Bangkok	
5	Ibiza	
6	Antalya	
7	Istanbul	10% to 25%
8	Singapore	
9	Athens	
10	Vienna	
14	Venice	

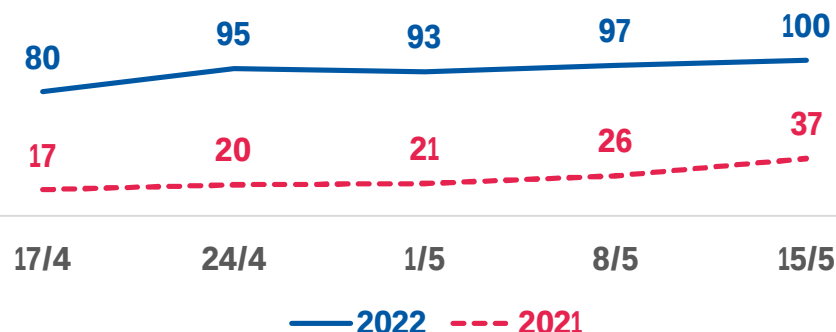
Source: ENIT Research Department using Google Destination Insights (for the period from 17/04/22 to 17/05/22, as recorded on 25/05/22) – All data is indexed

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

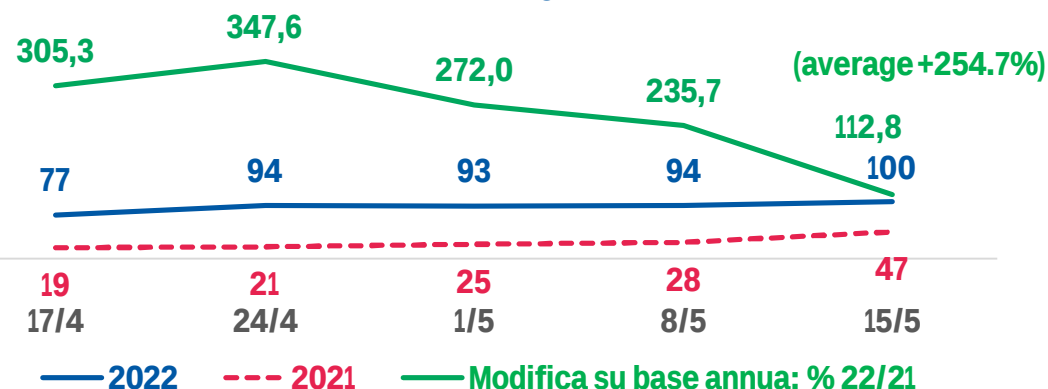
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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

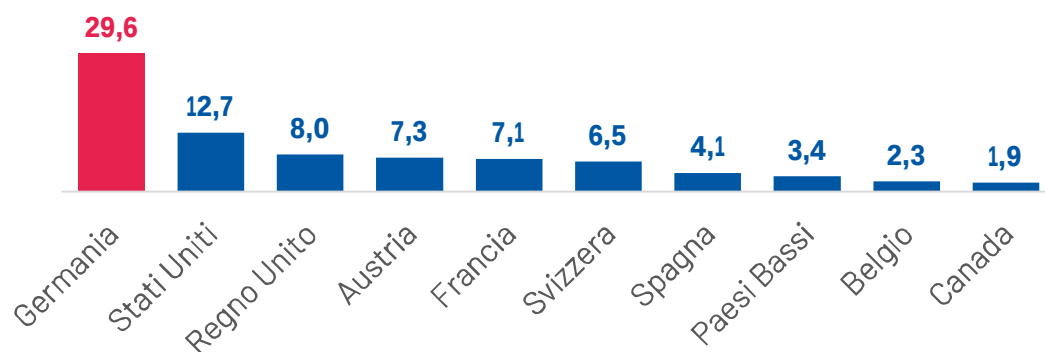


For the period analysed, the search data for travel to Italy shows that **interest peaked on 15 May**.

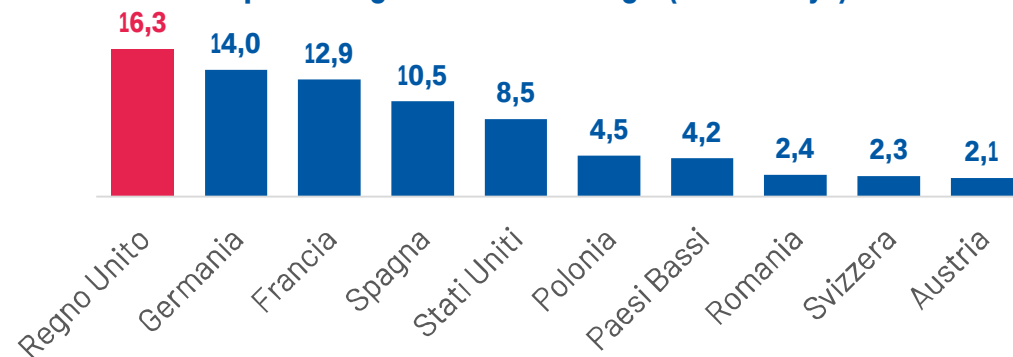
Comparison with the same dates from 2021 shows that **the greatest variation (in %) was on 24 April (+347.6%)**.

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

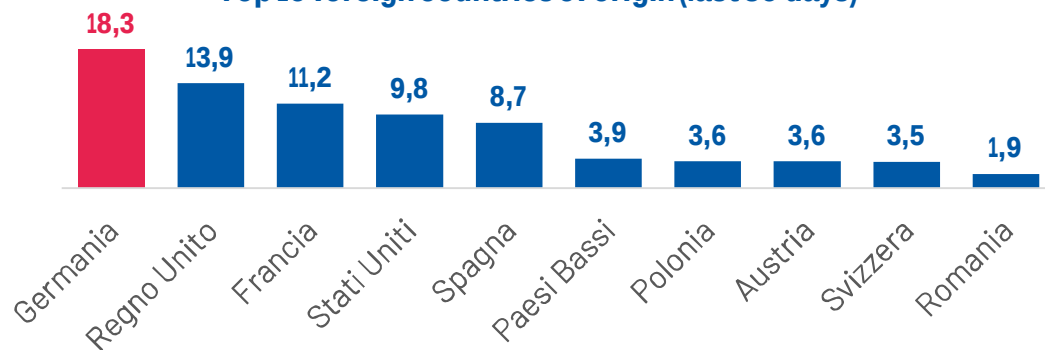
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

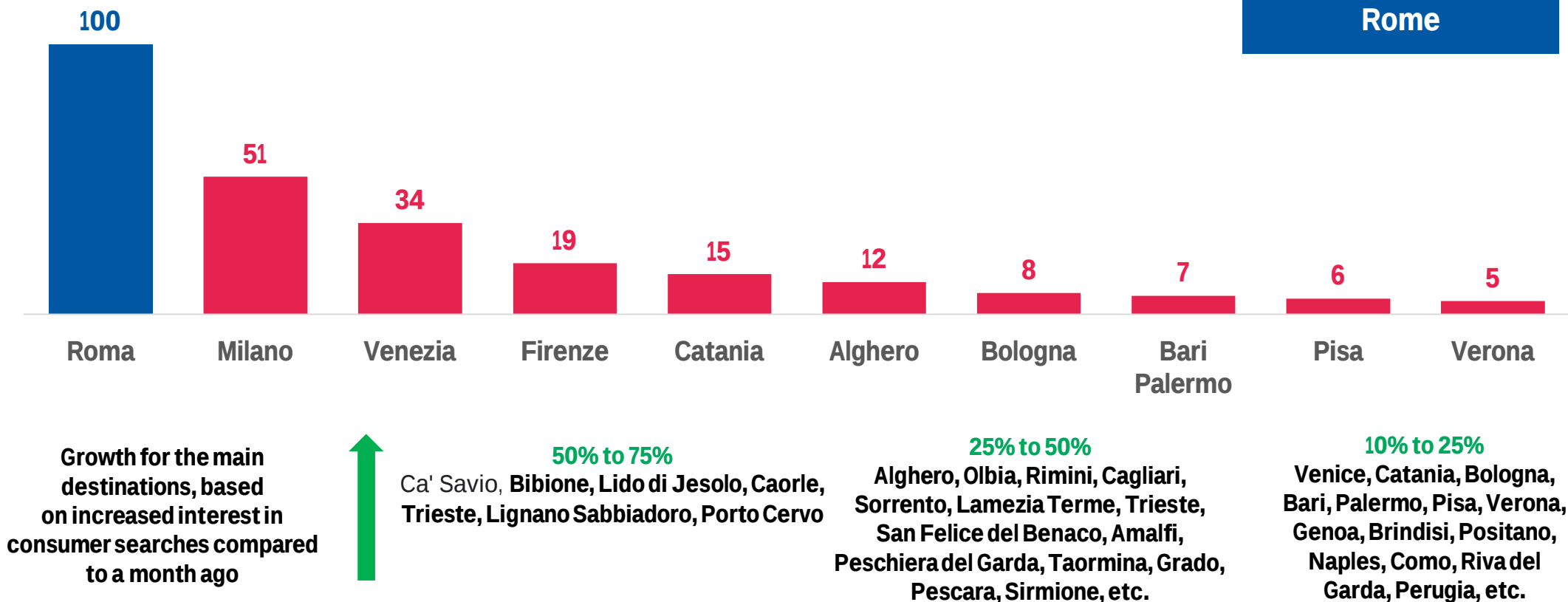


**Country with greatest
interest in incoming
travel: Germany**

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

Volume of interest
Main destination cities: Flight + accommodation

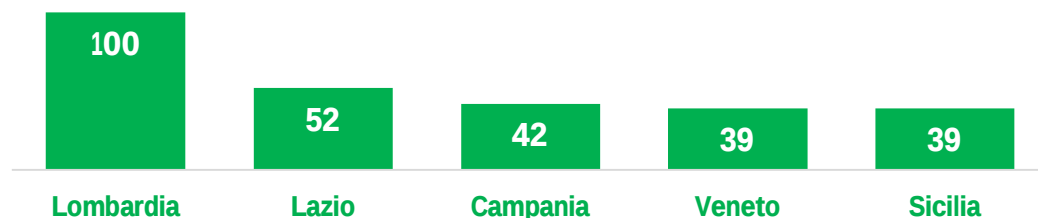
Most
searched/popular city
Rome



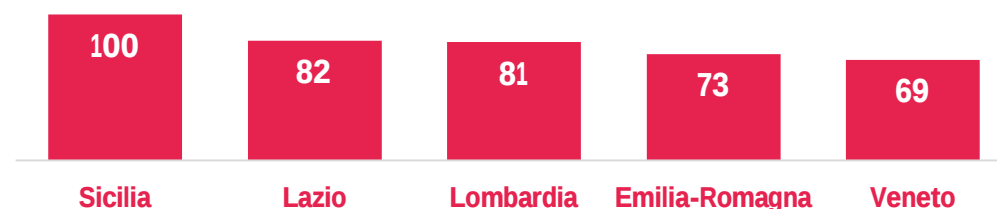
Source: ENIT Research Department using Google Destination Insights (for the period from 17/04/22 to 17/05/22, as recorded on 25/05/22) – All data is indexed

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, Cattolica, Vieste, Caorle, San Benedetto del Tronto	Olbia, Cagliari, Alghero, Brindisi, Trapani, Sorrento, Ancona, Bolzano	Rome, Milan, Catania, Palermo, Bari, Bologna, Naples, Lamezia Terme, Genoa, Pisa, Trieste, Perugia, Reggio Calabria, Pescara, Crotone
50% to 75%		
Rimini, Riccione, Cervia, Cesenatico, Pantelleria, Igea Marina, Ischia, Lignano Sabbiadoro, Bibione, Senigallia, Syracuse, Torre San Giovanni		

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)

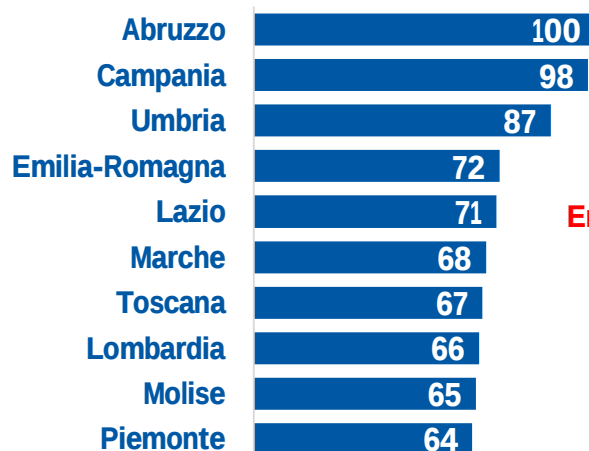
Travelling abroad



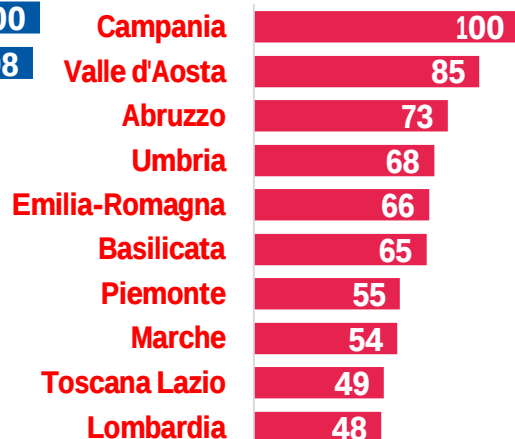
Source: ENIT Research Department using Google Destination Insights (for the period from 17/04/22 to 17/05/22, as recorded on 25/05/22) – All data is indexed

GOOGLE SEARCHES FOR ITALY – HOLIDAYS

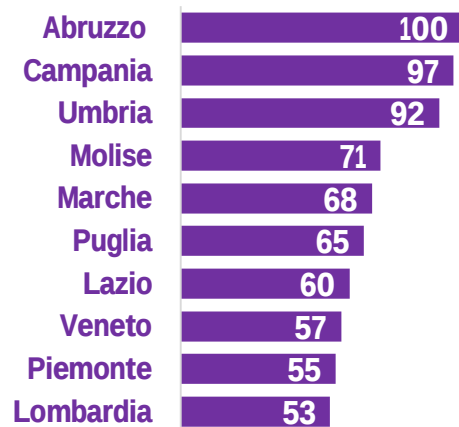
Holiday searches
Travel category: interest by region



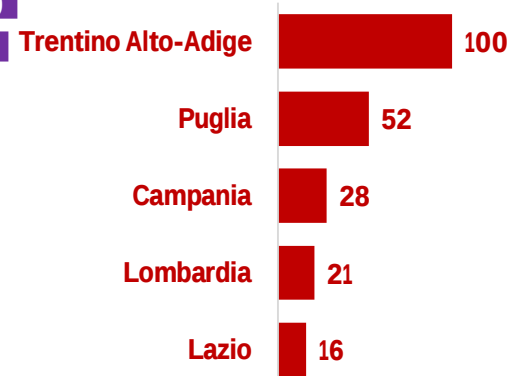
Holiday searches
Travel category: tourist destinations
Interest by region



Holiday searches - Travel category:
hotels and accommodation
Interest by region



Holiday searches
Travel category: tourist destinations – Google Images
Interest by region



Among the correlated subjects for holidays – travel/tourist destinations

Increasing

Accommodation facility: extended-stay hotel upsurge; apartment +150%
Subject: tourism +700%; summer +100%
Place/municipality/region/city: Marina di Campo upsurge; Castellabate +550%; Salento +500%; Agropoli +300%; Santa Maria di Castellabate +200%; Marina di Camerota, Sperlonga +130%; Palinuro, Paestum +80%
Time: week +130%
Month: June +50%
In other countries: Zanzibar +250%; Croatia +170%; Maldives +150%; Lisbon +90%; Greece +60%

Most searched

Subject: holiday, home, flight, travel, cost, summer, Skyscanner, tourism
Accommodation facility: holiday home, apartment
Place/region/municipality: Marina di Camerota, Salento, Santa Maria di Castellabate
Month: August, June
In other countries: Greece, Maldives, Mallorca, Portugal

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 25/05/2022

Product	May		June		July	
	2022	2021	2022	2021	2022	2021
Total for Italy	39.8	30.0	30.5	24.2	19.3	30.1
Mountains	33.9	32.5	24.7	20.4	24.2	29.3
Art and culture	47.4	26.3	33.5	23.0	17.1	26.3
Beach	32.1	41.3	30.5	28.2	24.4	39.4
Lake	36.2	34.7	39.5	27.8	29.3	41.1
Spa	31.9	34.6	25.2	24.8	19.9	29.6
Other	31.8	18.7	18.9	18.3	11.1	20.9

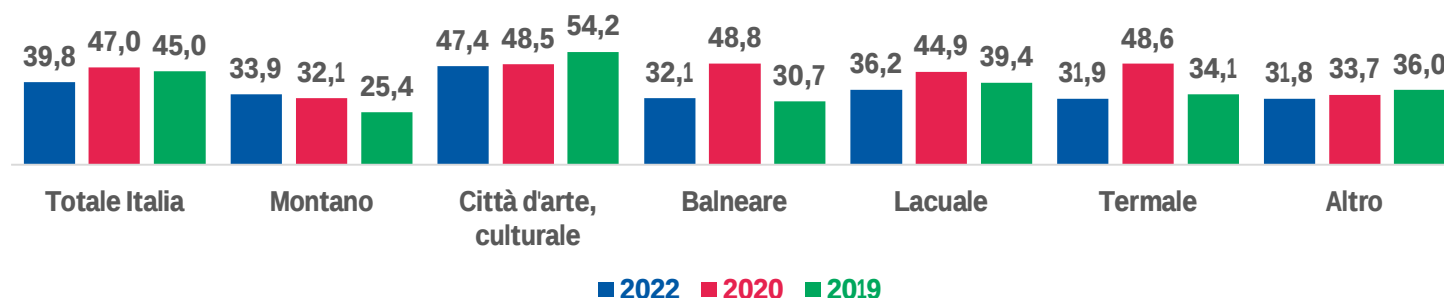
Bookings for accommodation facilities through Online Travel Agencies currently stand at 39.8% of the capacity for the month of May, which is approximately 10 percentage points more than last year. "Cultural" bookings (47.4%) are above the national average and have made up ground compared to 2021 (+21.1%).

At present, bookings cover 30.5% of the capacity for June. The highest figures and biggest increases concern lakes (39.5% and +11.7%) and artistic and cultural towns and cities (33.5% and +10.5%). The occupancy rate for the month of July stands at 19.3%. Leading the drive on this front are bookings for lakes (29.3%), beach resorts (24.4%) and the mountains (24.2%).

ACCOMMODATION BOOKINGS THROUGH OTAS

MAY & JUNE 2022 (compared with 2020 and 2019)

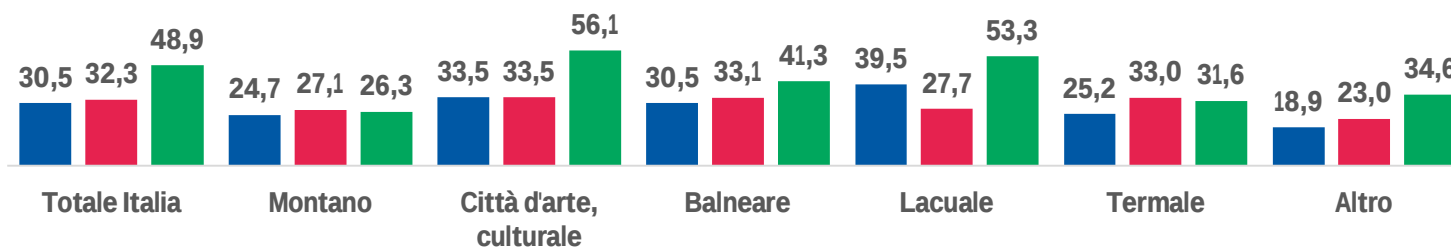
May: % occupancy of accommodation
in OTA channels on 25/05/2022



In the month of May, the occupancy rate in accommodation facilities accounted for by bookings through OTAs was down by 7.2 percentage points compared to 2020 and 5.2 percentage points compared to 2019.

At present, bookings in the mountains are up on both 2020 (+1.8 percentage points) and 2019 (+8.5 percentage points), while those in beach resorts are only up on 2019 (+1.8 percentage points).

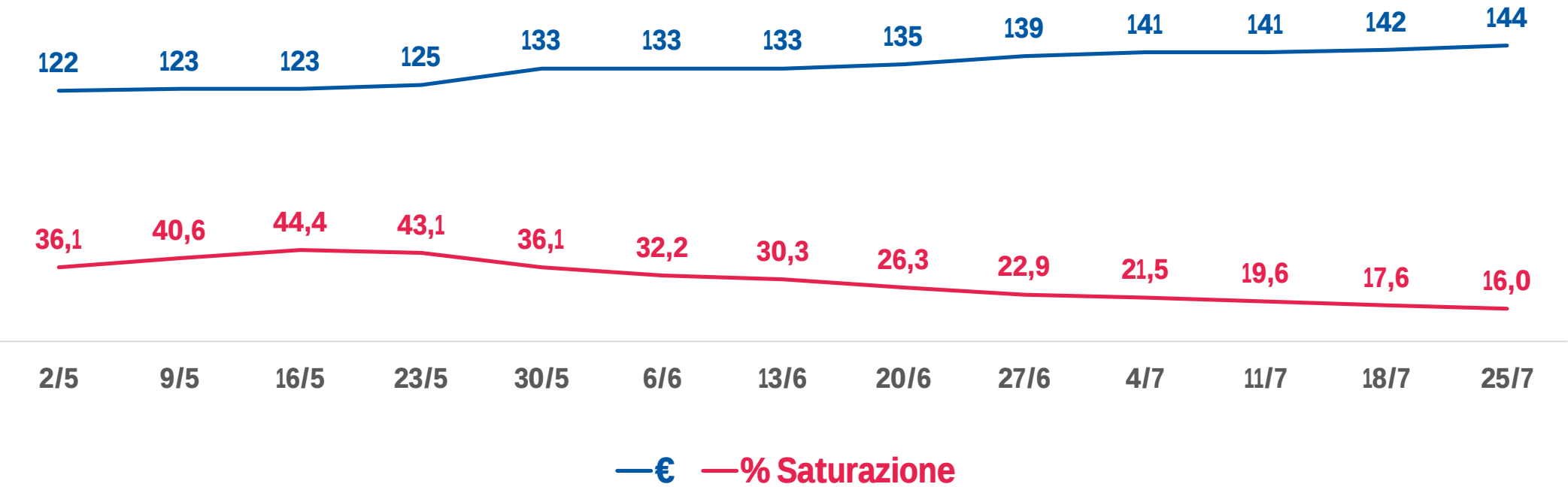
June: % occupancy of accommodation
in OTA channels on 25/05/2022



In June, overall bookings are down by 1.8 percentage points on 2020 and 18.4 percentage points on 2019. So far, the only categories to make up ground on 2020 are lakes (+11.8 percentage points) and artistic and cultural towns and cities, which have the same occupancy rate (33.5%). The categories that are suffering least compared with 2019 are the mountains (-1.6 percentage points) and spas (-6.4 percentage points).

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

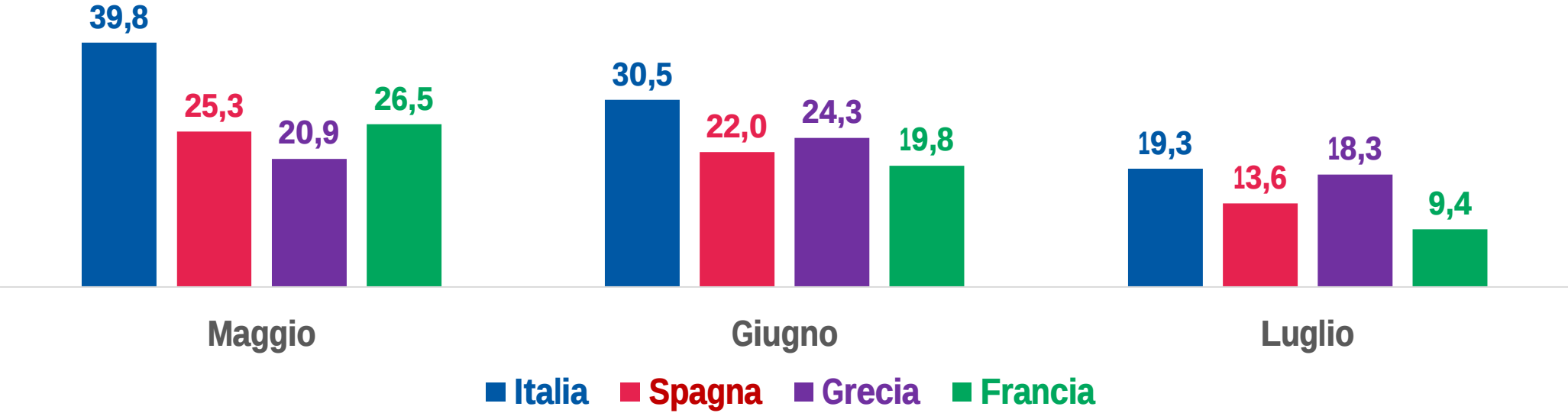
Average price and % occupancy for accommodation facilities in Italy
booked through OTAs, as of 25/05/2022 - Weekly data



Source: ENIT Research Department using The DataAppeal Company data

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

% occupancy of accommodation
in OTA channels on 25/05/2022 - Italy and competitors

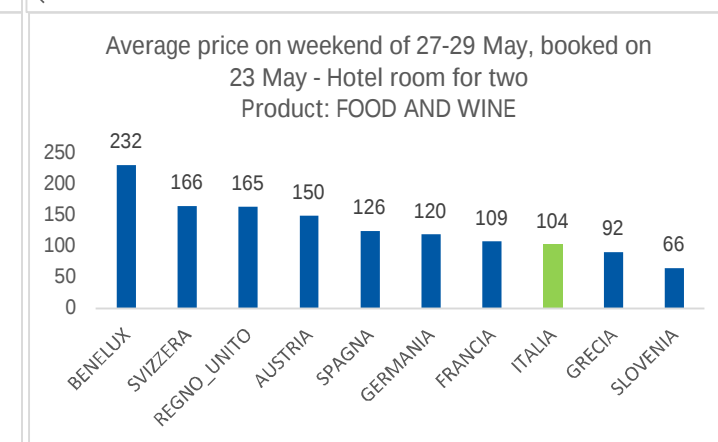
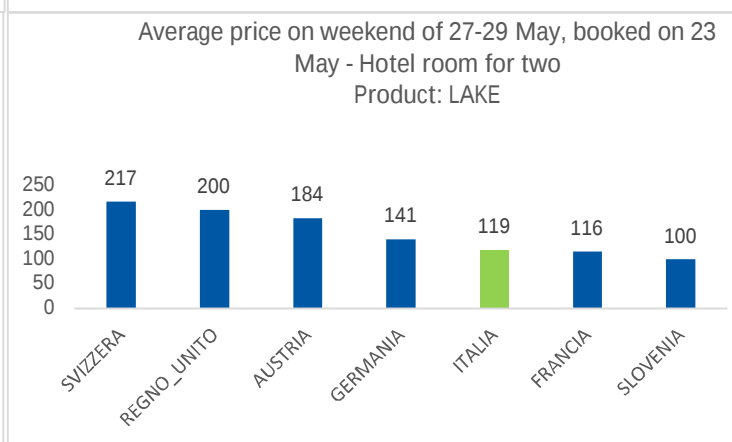
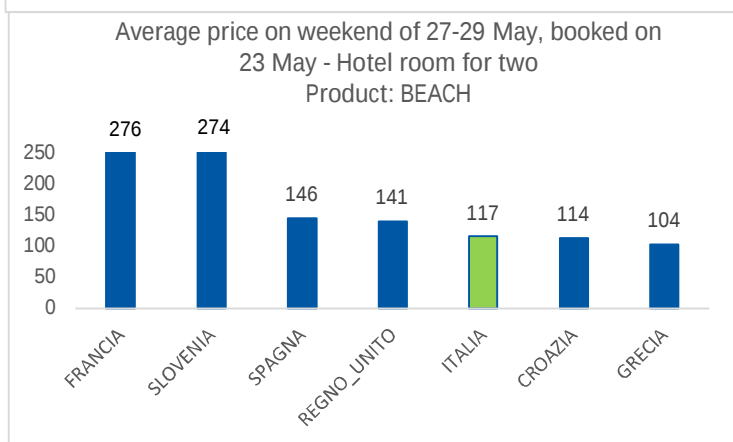
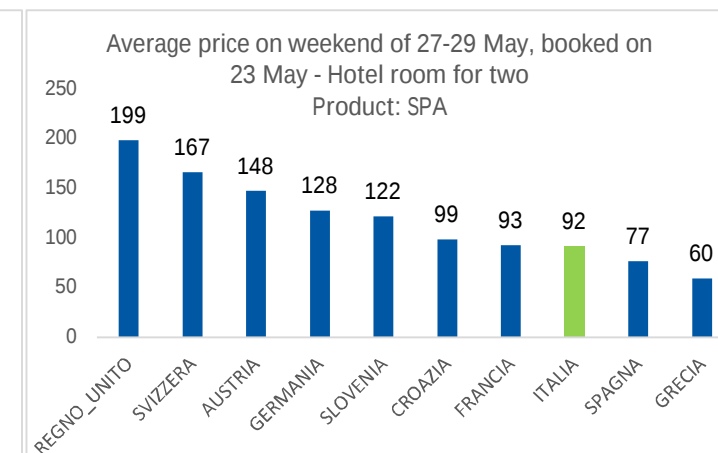
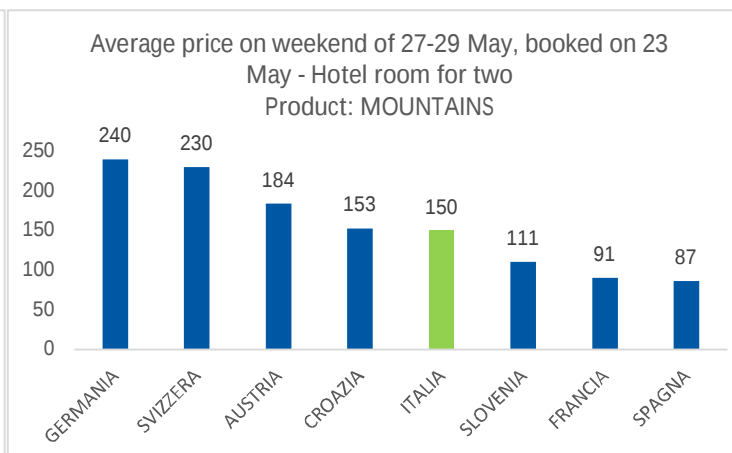
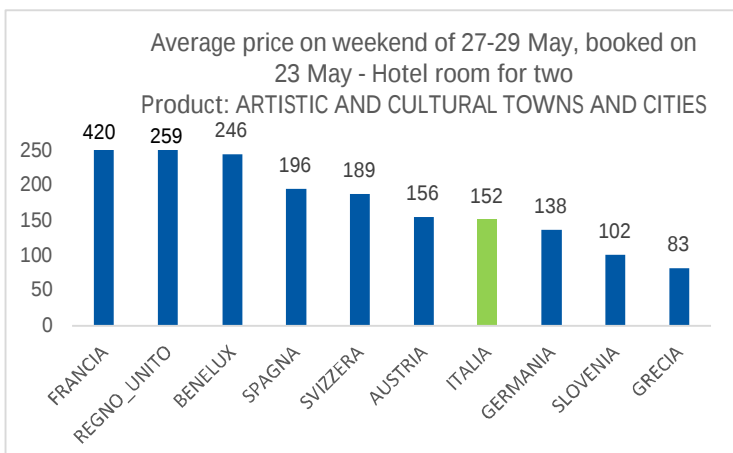


Source: ENIT Research Department using The Data Appeal Company data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

5TH WEEKEND IN MAY

HOTEL



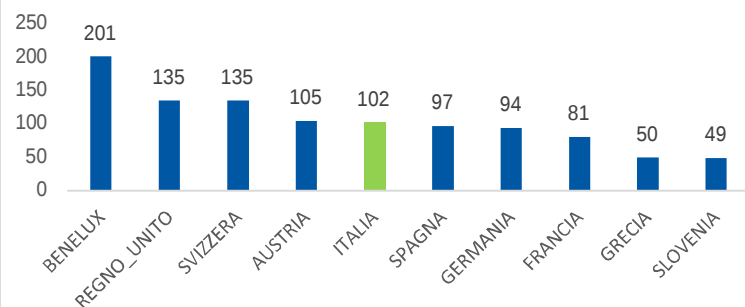
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

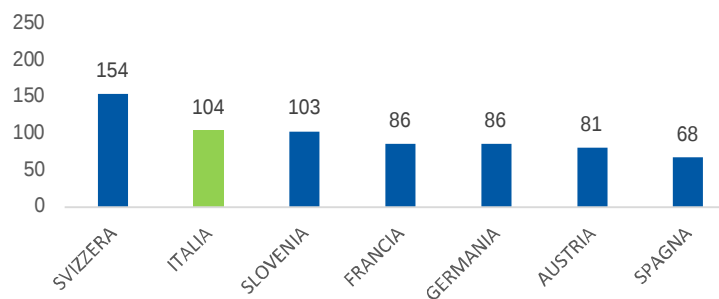
5TH WEEKEND IN MAY

GUEST HOUSES

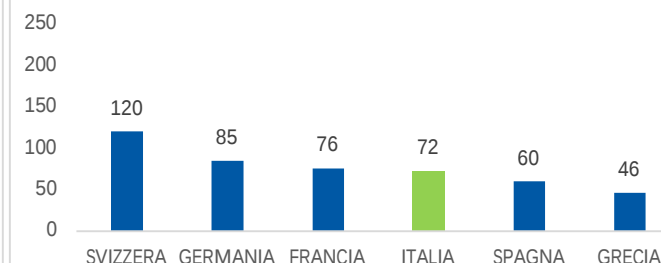
Average price on weekend of 27-29 May, booked on 23 May - Guest house room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



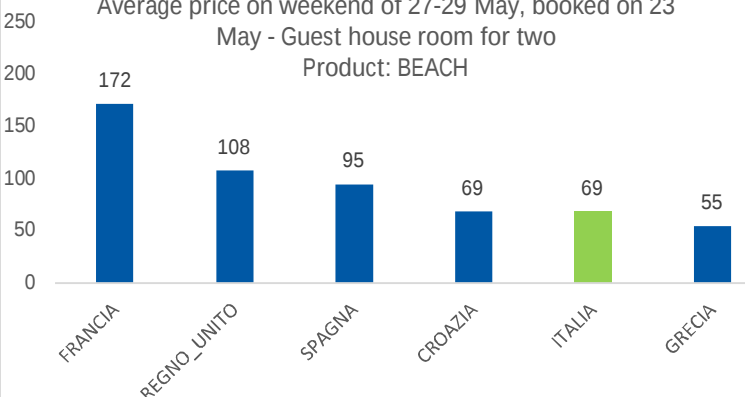
Average price on weekend of 27-29 May, booked on 23 May - Guest house room for two
Product: MOUNTAINS



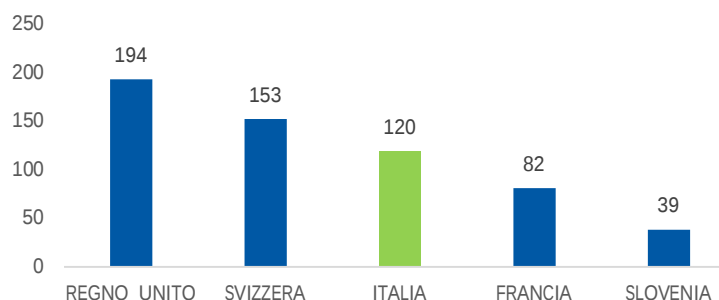
Average price on weekend of 27-29 May, booked on 23 May - Guest house room for two
Product: SPA



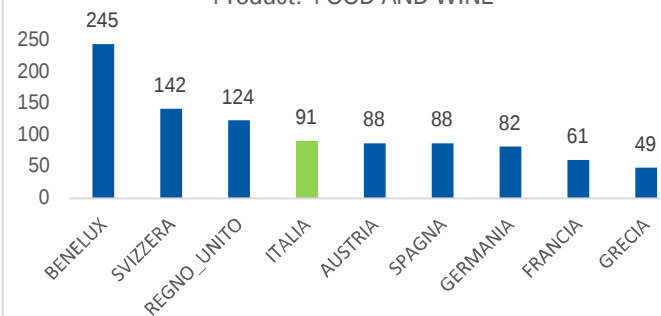
Average price on weekend of 27-29 May, booked on 23 May - Guest house room for two
Product: BEACH



Average price on weekend of 27-29 May, booked on 23 May - Guest house room for two
Product: LAKE



Average price on weekend of 27-29 May, booked on 23 May - Guest house room for two
Product: FOOD AND WINE



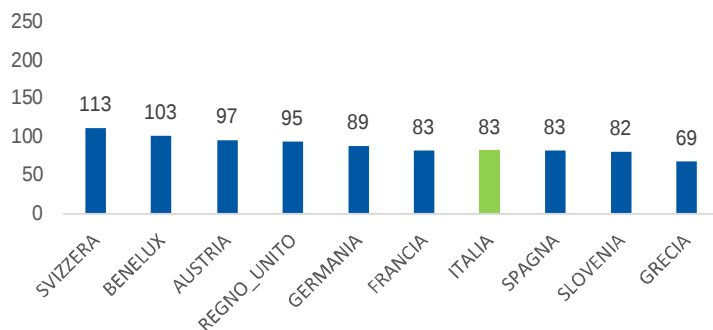
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

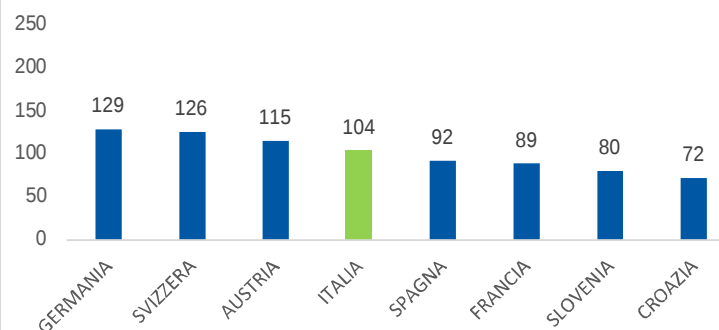
5TH WEEKEND IN MAY

B&Bs

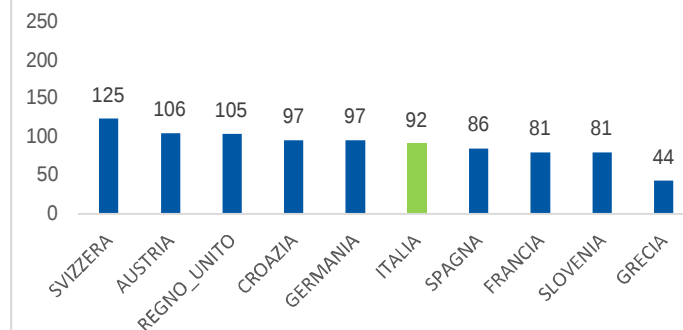
Average price on weekend of 27-29 May, booked on 23 May - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



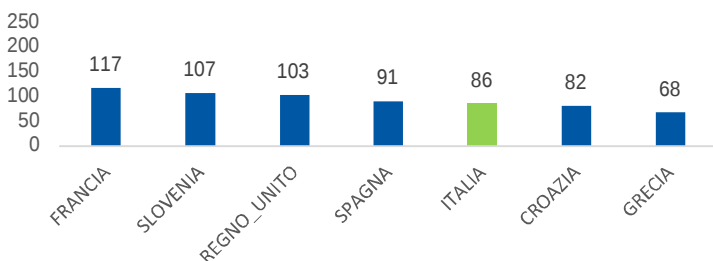
Average price on weekend of 27-29 May, booked on 23 May - B&B room for two
Product: MOUNTAINS



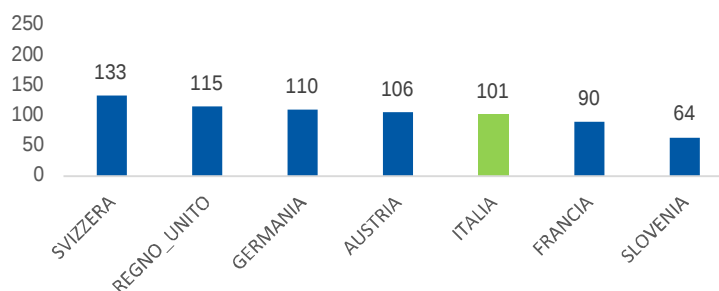
Average price on weekend of 27-29 May, booked on 23 May - B&B room for two
Product: SPA



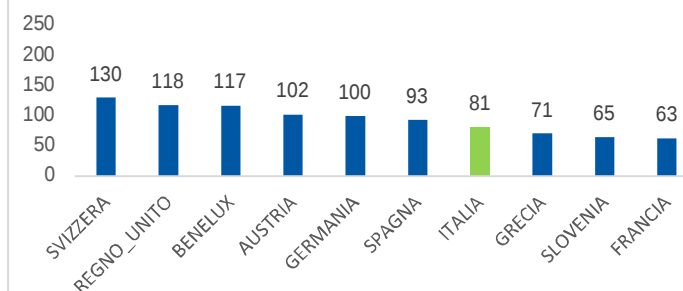
Average price on weekend of 27-29 May, booked on 23 May - B&B room for two
Product: BEACH



Average price on weekend of 27-29 May, booked on 23 May - B&B room for two
Product: LAKE



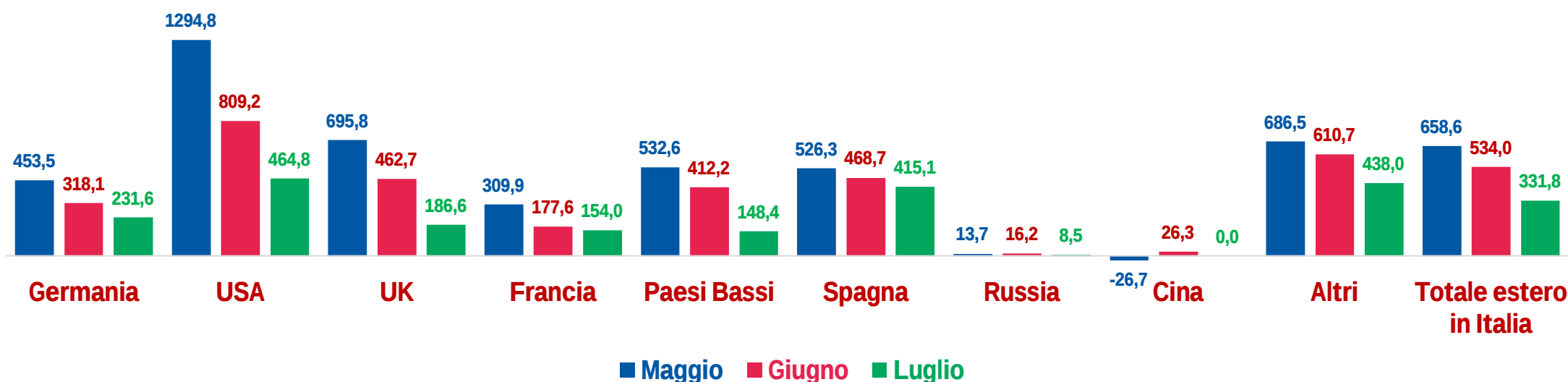
Average price on weekend of 27-29 May, booked on 23 May - B&B room for two
Product: FOOD AND WINE



Source: ENIT Research Department using Remtene data

INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022

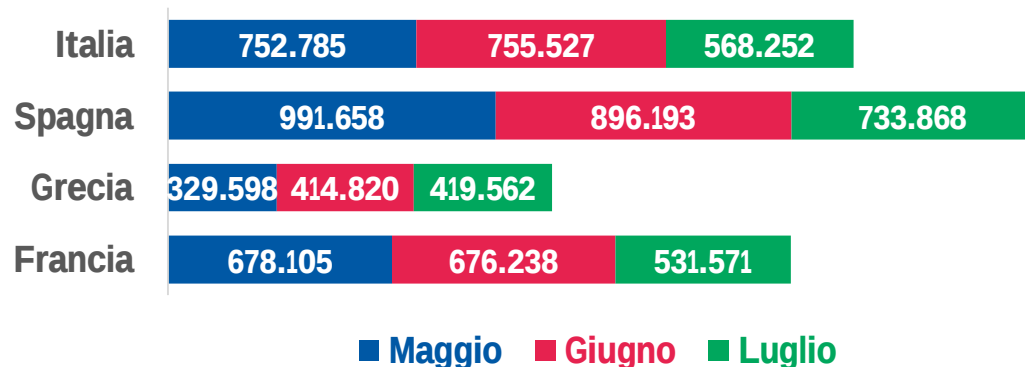
Bookings of flights to Italy by country of origin
Var. % 2022/2021, as of 26/05/2022



Overall, **bookings for flights from other countries to Italy are currently up on 2021 by 658.6% in May, 534.0% in June and 331.8% in July.** The **United States** are leading the way (May +1294.8%; June +809.2%). At present, bookings from China for June are up (+26.3%).

INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022

Flight bookings on 26/05/2022
Total international flights to Italy and competitors



Total international flight bookings, Italy and competitors
Var. % 2022/2021, as of 26/05/2022

Destination	May	June	July
Italy	658.6%	534.0%	331.8%
Spain	240.7%	247.2%	188.6%
Greece	300.4%	178.2%	115.7%
France	654.3%	488.6%	296.4%

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 26/05/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	534.0%	-26.5%
Spain	247.2%	-17.9%
Greece	178.2%	-1.7%
France	488.6%	-26.1%

Total flight bookings, Italy and competitors Var. % July 2022/2021 and 2022/2019, as of 26/05/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	331.8%	-19.7%
Spain	188.6%	-10.7%
Greece	115.7%	9.3%
France	296.4%	-12.1%

Source: ENIT Research Department using Forward Data – updated on 15/05/2022