

ENIT BULLETIN

In-depth analysis of trends in tourism

May 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	
Southern Europe	100	Spain	100	London	100
Western Europe	57	USA	96	Paris	85
North America	44	Italy	72	Dubai	74
Western Asia	44	United Kingdom	64	New York	54
Northern Europe	38	France	62	Barcelona	50
South East Asia	25	Turkey	42	Amsterdam	49
South Asia	22	UAE	40	Lisbon	48
Central America	18	Portugal	39	Rome	43
Caribbean	16	Germany	36	Istanbul	41
North Africa	14	Mexico	35	Madrid	32

Destinations with the fastest growth in the world in terms of interest in travel
50%
Netherlands

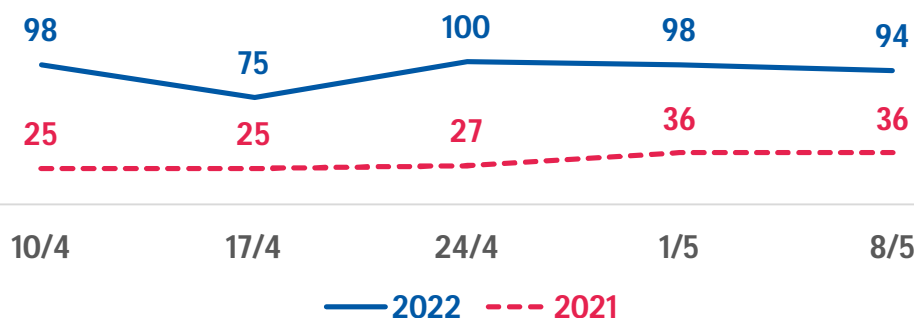
Growth by destination city - Flight + accommodation		
1	Fort Lauderdale	More than 75%
2	Seville	50% to 75%
3	Singapore	25% to 50%
4	Palma de Mallorca	
5	Bangkok	
6	Ibiza	
7	Antalya	
8	Athens	10% to 25%
9	Berlin	
10	Vienna	
13	Venice	

Source: ENIT Research Department using Google Destination Insights (for the period from 09/04/22 to 10/05/22, as recorded on 18/05/22) – All data is indexed

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

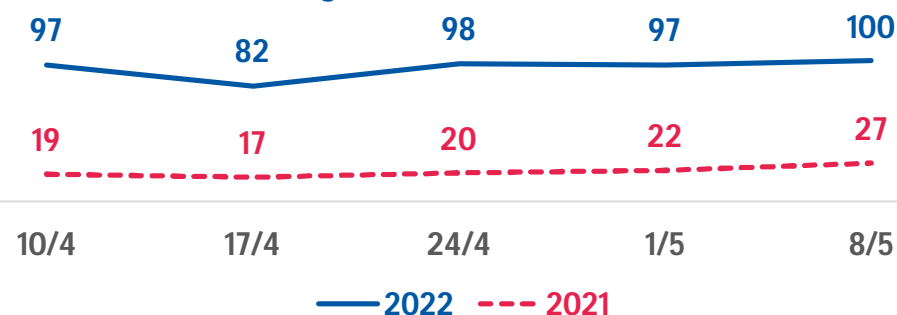
Search interest in travel to Italy

Accommodation 2022/2021



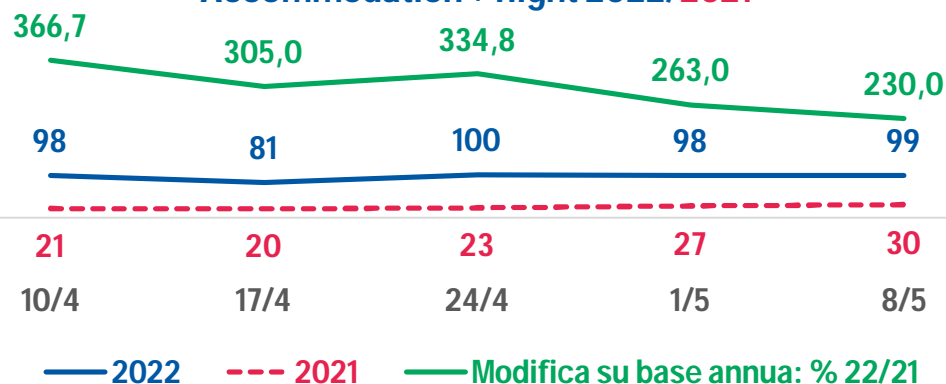
Search interest in travel to Italy

Flight 2022/2021



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

(average +300.0%)

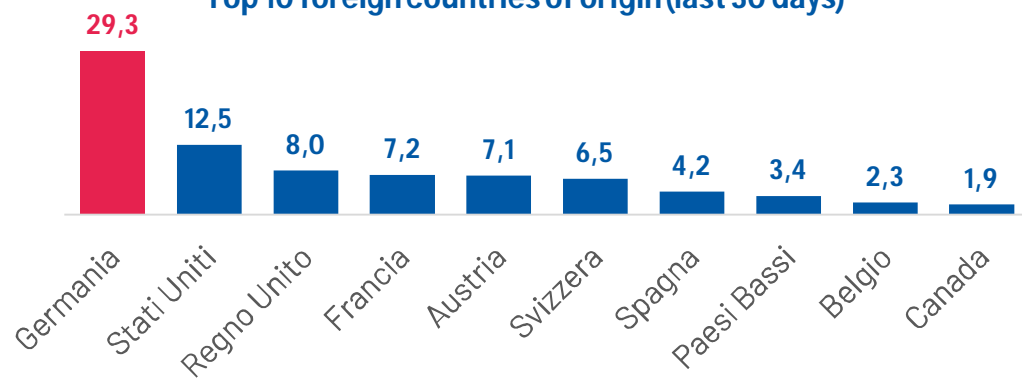


For the period analysed, the search data for travel to Italy shows that **interest peaked on 24 April**.

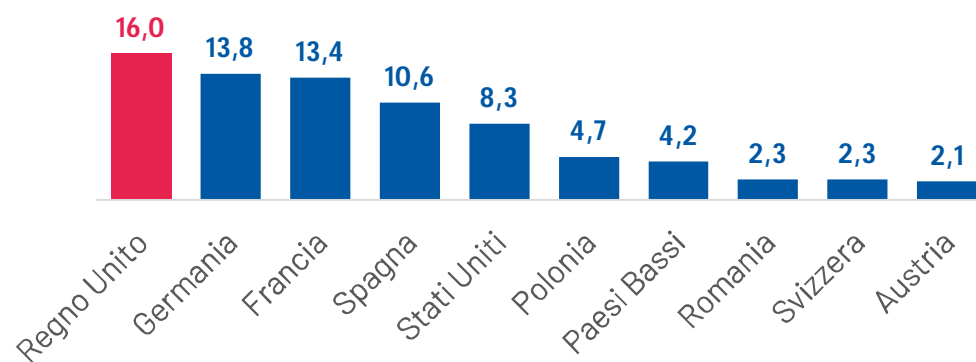
Comparison with the same dates from 2021 shows that **the greatest variation (in %) was on 10 April (+366.7%)**.

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

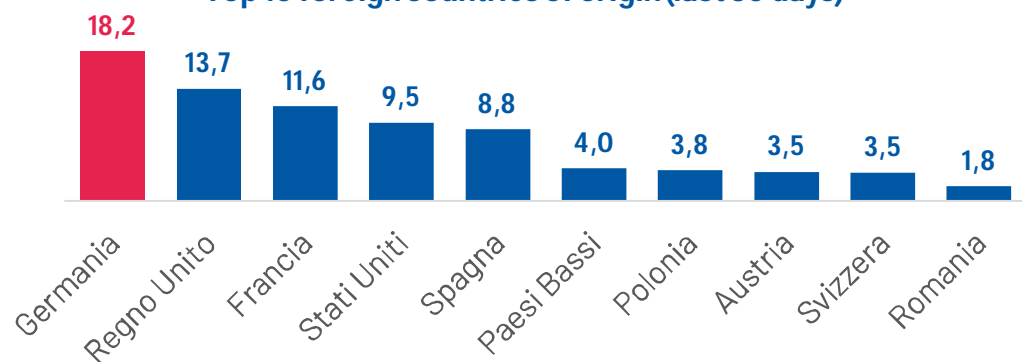
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

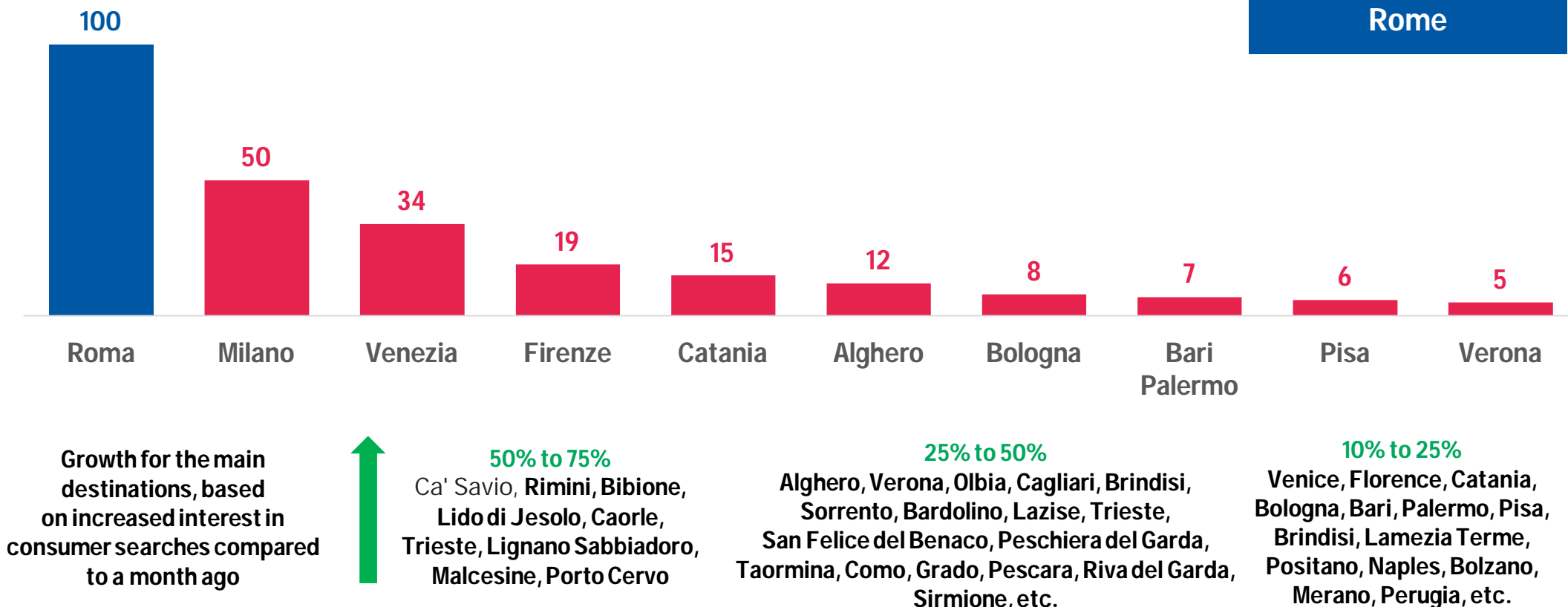


Country with greatest
interest in incoming
travel: Germany

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

Volume of interest
Main destination cities: Flight + accommodation

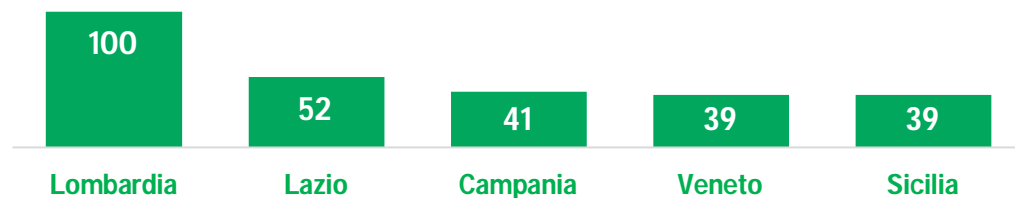
Most
searched/popular city
Rome



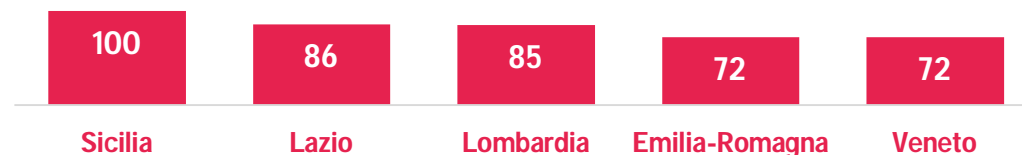
Source: ENIT Research Department using Google Destination Insights (for the period from 09/04/22 to 10/05/22, as recorded on 18/05/22) – All data is indexed

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

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)

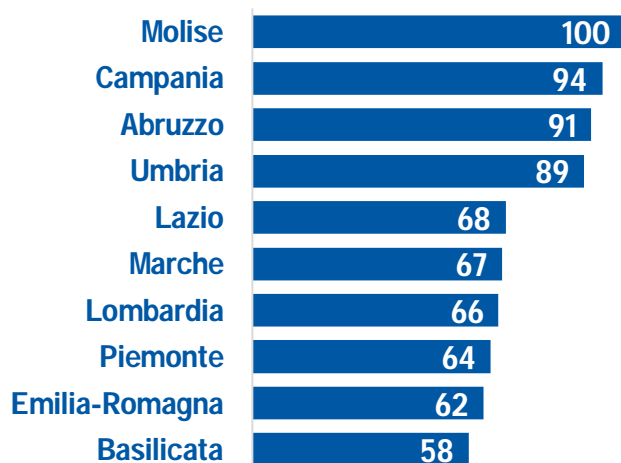
Travelling abroad



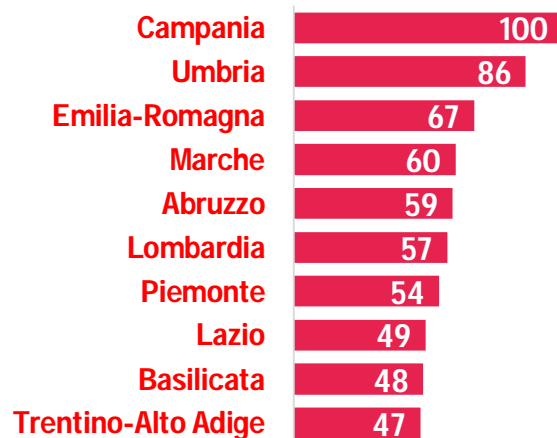
Source: ENIT Research Department using Google Destination Insights (for the period from 09/04/22 to 10/05/22, as recorded on 18/05/22)
– All data is indexed

GOOGLE SEARCHES FOR ITALY – HOLIDAYS

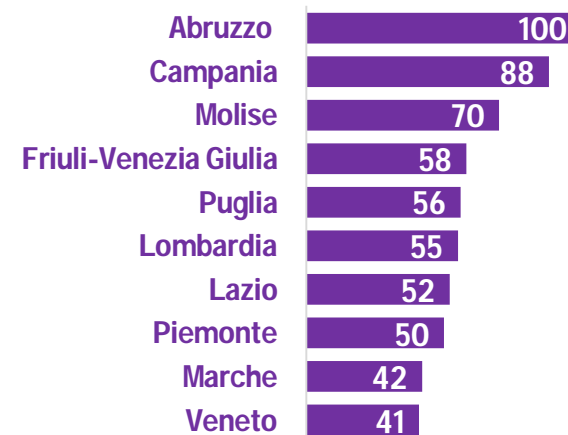
Holiday searches
Travel category: interest by region



Holiday searches
Travel category: tourist destinations
Interest by region



Holiday searches
Travel category: hotels and accommodation
Interest by region



Among the correlated subjects for holidays – travel/tourist destinations

Increasing

Subject: summer +400%; family +100%; child +90%
Place/municipality/region: Sardinia upsurge; Liguria +300%;
Punta Prosciutto +60%; Gallipoli +50%; Puglia +40%

Most searched

Subject: holiday, home, flight, travel, cost, summer
Accommodation facility: holiday home, apartment
Place/region/municipality: Salento, Puglia, Gallipoli, Sardinia, Abruzzo, Otranto,
Porto Cesareo, Liguria
In other countries
City/Island/Country: Croatia, Greece

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 18/05/2022

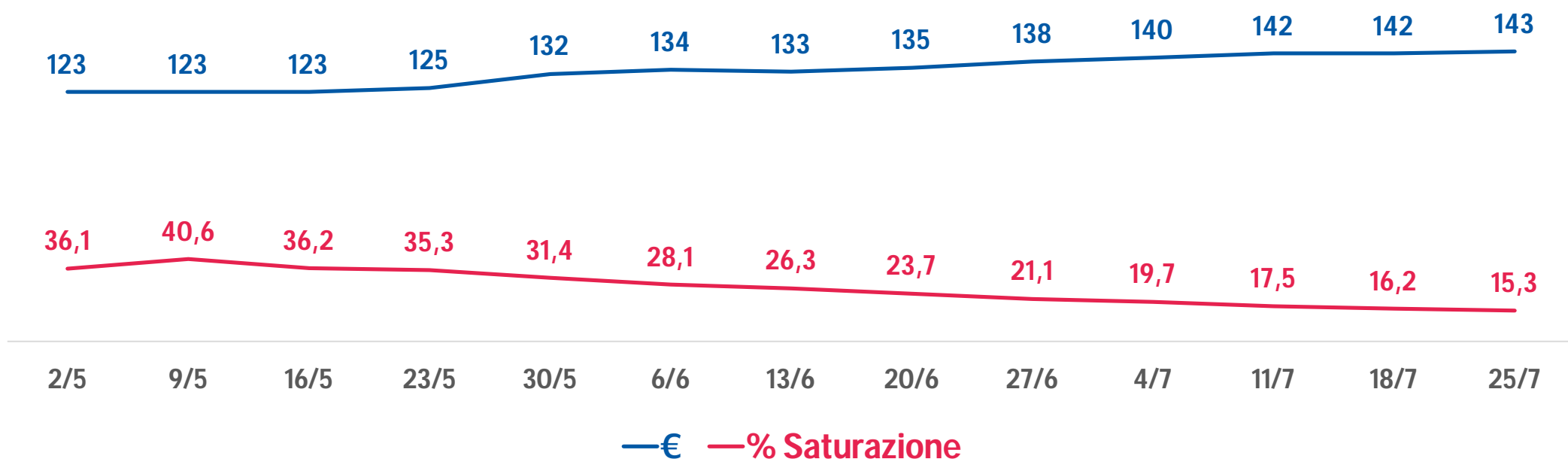
Product	May		June		July	
	2022	2021	2022	2021	2022	2021
Total for Italy	36.0	30.0	26.8	24.2	17.7	30.1
Mountains	30.9	32.5	23.0	20.4	23.0	29.3
Art and culture	43.1	26.3	29.2	23.0	15.6	26.3
Beach	28.9	41.3	27.2	28.2	22.3	39.4
Lake	32.6	34.7	35.7	27.8	28.0	41.1
Spa	28.7	34.6	21.9	24.8	19.2	29.6
Other	27.9	18.7	16.3	18.3	10.4	20.9

Bookings for accommodation facilities through Online Travel Agencies currently stand at 36.0% of the capacity for the month of May, which is 6 percentage points more than last year. **“Cultural” bookings (43.1%) are above the national average and have made up ground compared to 2021 (+16.8%).**

At present, **bookings cover 26.8% of the capacity for June. The highest figures and biggest increases concern lakes (35.7% and +7.9%) and artistic and cultural towns and cities (29.2% and +6.2%). The occupancy rate for the month of July stands at 17.7%. Leading the drive on this front are bookings for lakes (28.0%), the mountains (23.0%) and beach resorts (22.3%).**

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

Average price and % occupancy for accommodation facilities in Italy
booked through OTAs, as of 18/05/2022 - Weekly data

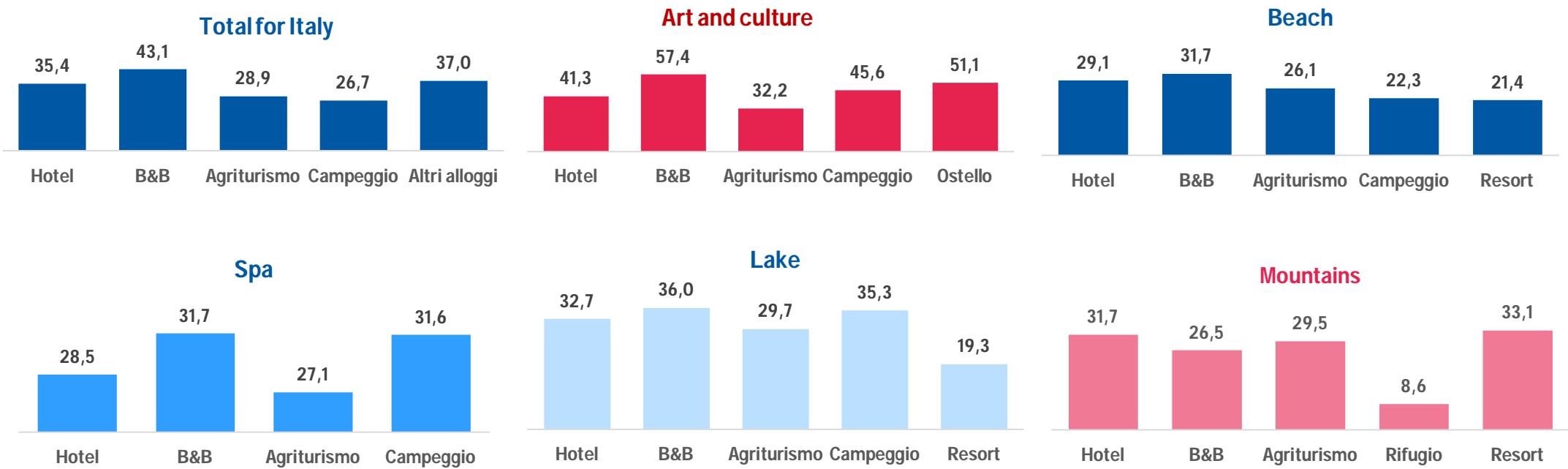


Source: ENIT Research Department using The Data Appeal Company data

ACCOMMODATION BOOKINGS THROUGH OTAS - MAY 2022

TYPE OF ACCOMMODATION/PRODUCT

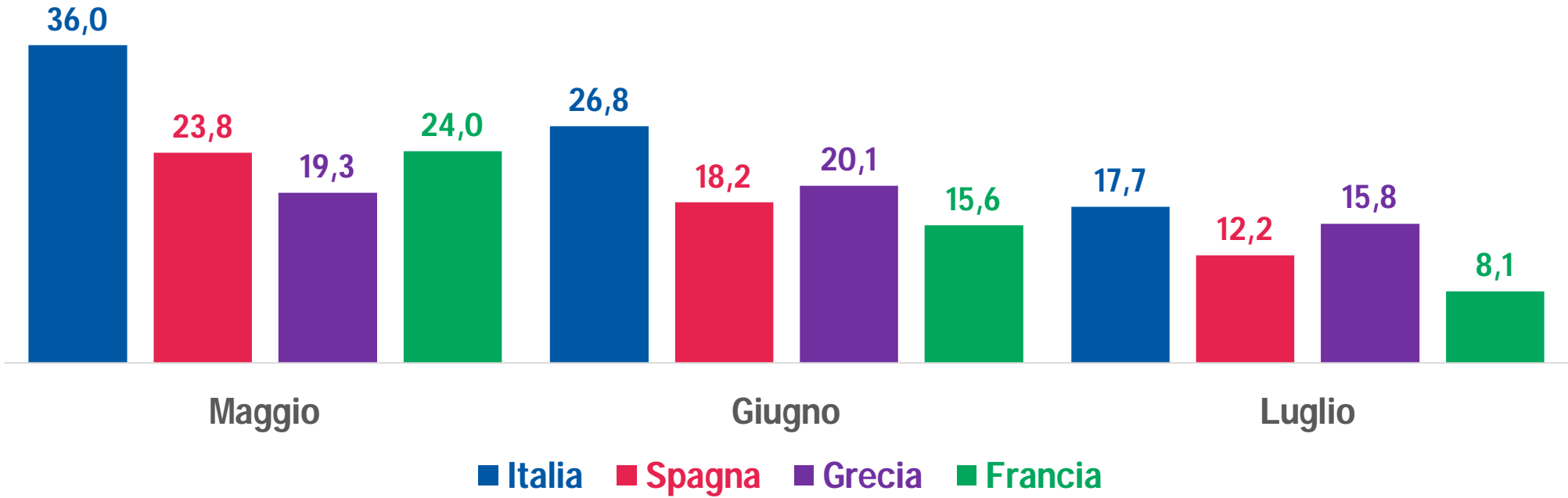
% occupancy of accommodation
in OTA channels on 18/05/2022



Source: ENIT Research Department using The Data Appeal Company data

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

% occupancy of accommodation
in OTA channels on 18/05/2022 - Italy and competitors



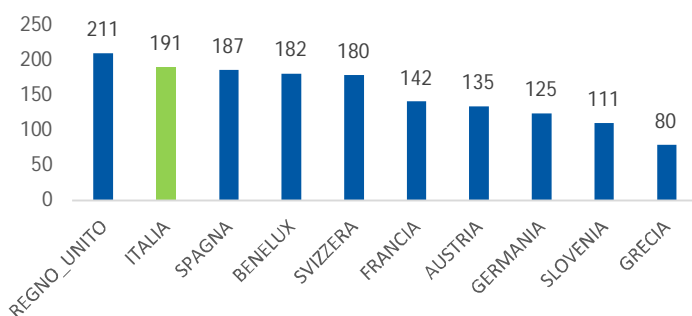
Source: ENIT Research Department using The Data Appeal Company data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

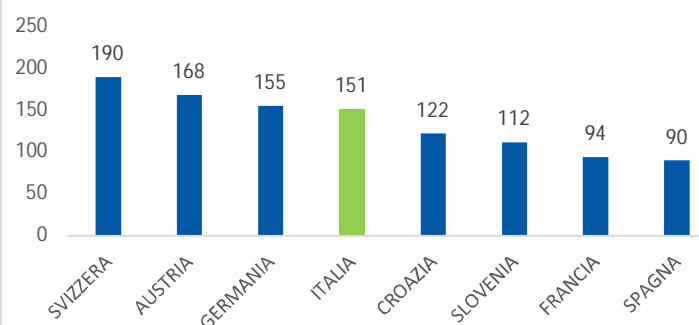
4TH WEEKEND IN MAY

HOTEL

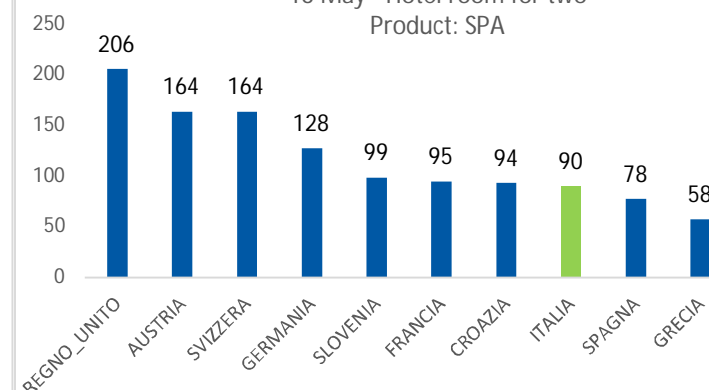
Average price on weekend of 20-22 May, booked on 16 May - Hotel room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



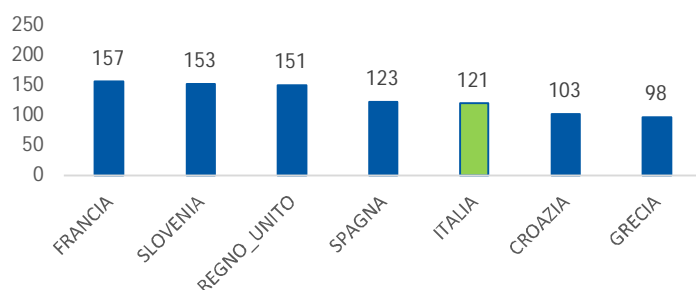
Average price on weekend of 20-22 May, booked on 16 May - Hotel room for two
Product: MOUNTAINS



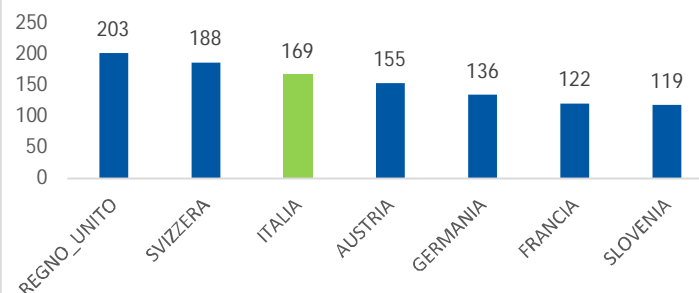
Average price on weekend of 20-22 May, booked on 16 May - Hotel room for two
Product: SPA



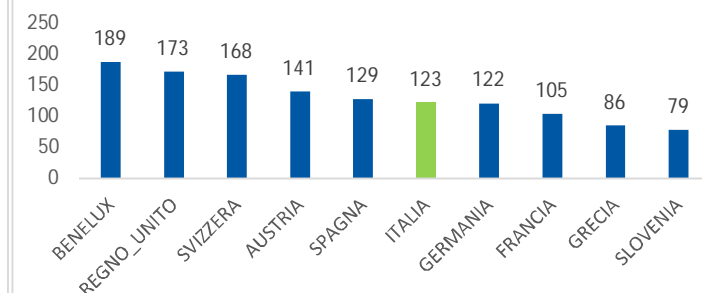
Average price on weekend of 20-22 May, booked on 16 May - Hotel room for two
Product: BEACH



Average price on weekend of 20-22 May, booked on 16 May - Hotel room for two
Product: LAKE



Average price on weekend of 20-22 May, booked on 16 May - Hotel room for two
Product: FOOD AND WINE



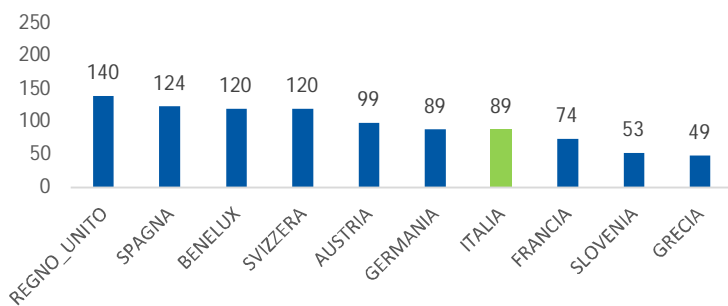
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

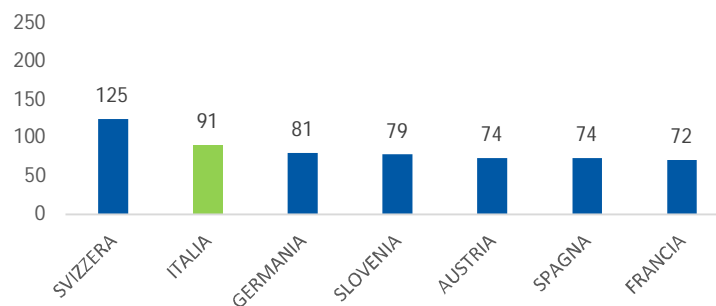
4TH WEEKEND IN MAY

GUEST HOUSES

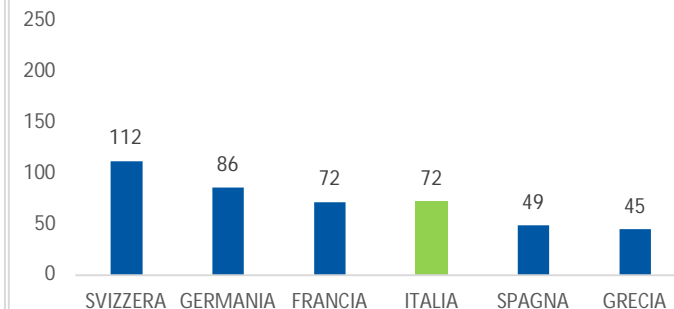
Average price on weekend of 20-22 May, booked on 16 May - Guest house room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



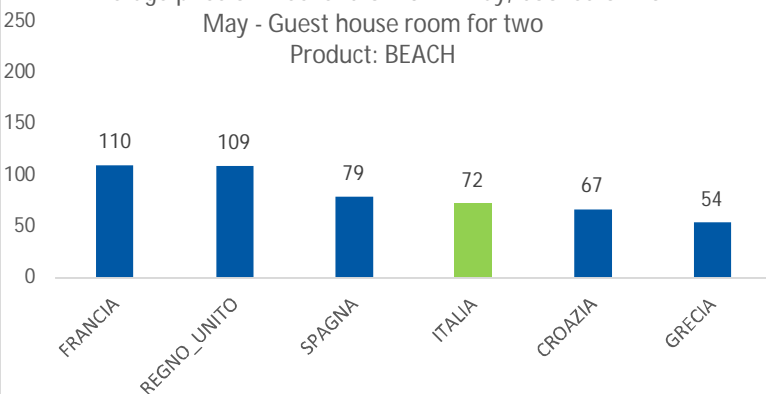
Average price on weekend of 20-22 May, booked on 16 May - Guest house room for two
Product: MOUNTAINS



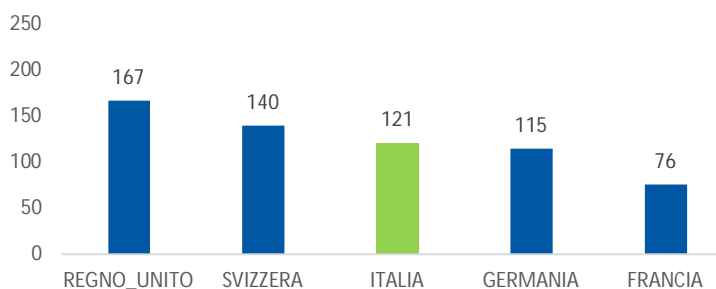
Average price on weekend of 20-22 May, booked on 16 May - Guest house room for two
Product: SPA



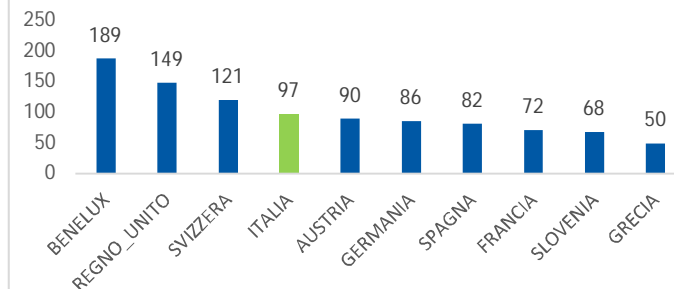
Average price on weekend of 20-22 May, booked on 16 May - Guest house room for two
Product: BEACH



Average price on weekend of 20-22 May, booked on 16 May - Guest house room for two
Product: LAKE



Average price on weekend of 20-22 May, booked on 16 May - Guest house room for two
Product: FOOD AND WINE



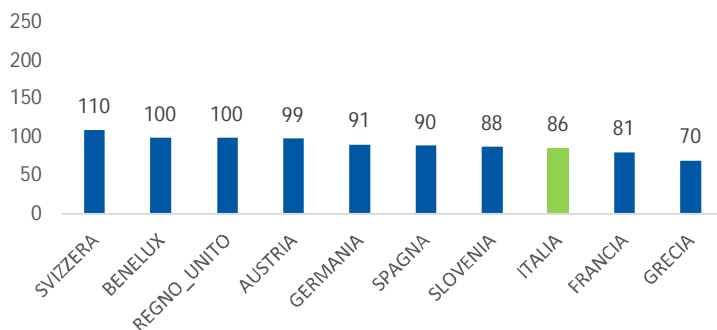
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

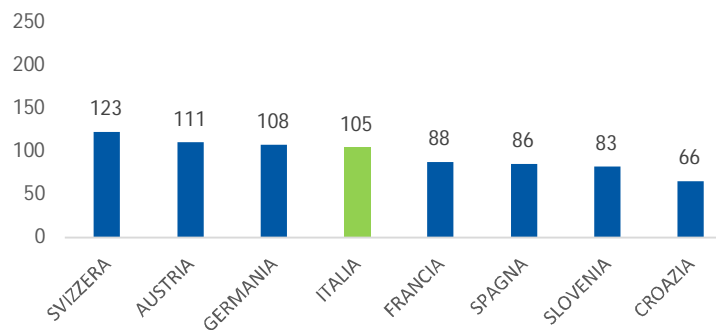
4TH WEEKEND IN MAY

B&Bs

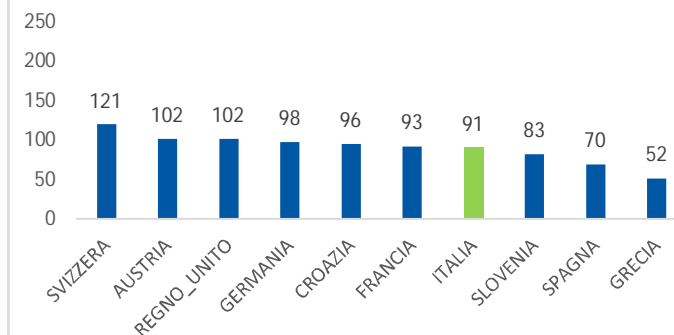
Average price on weekend of 20-22 May, booked on 16 May - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



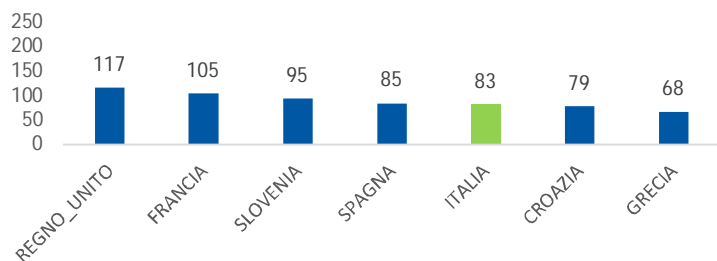
Average price on weekend of 20-22 May, booked on 16 May - B&B room for two
Product: MOUNTAINS



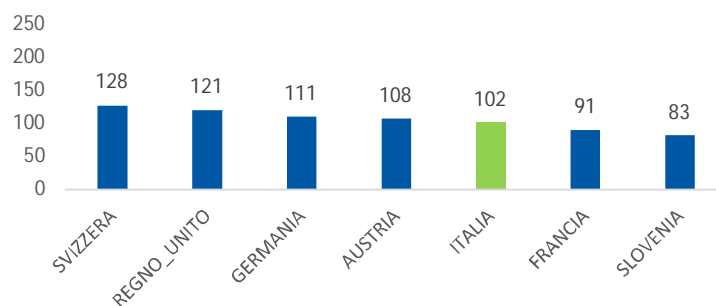
Average price on weekend of 20-22 May, booked on 16 May - B&B room for two
Product: SPA



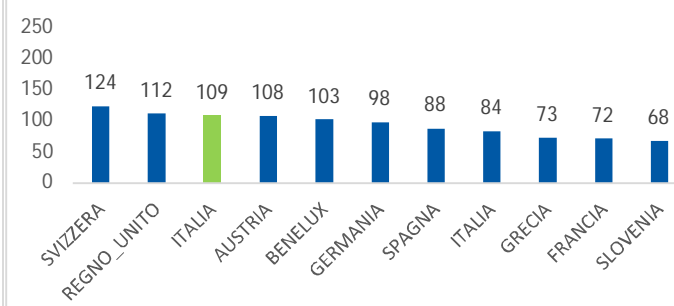
Average price on weekend of 20-22 May, booked on 16 May - B&B room for two
Product: BEACH



Average price on weekend of 20-22 May, booked on 16 May - B&B room for two
Product: LAKE



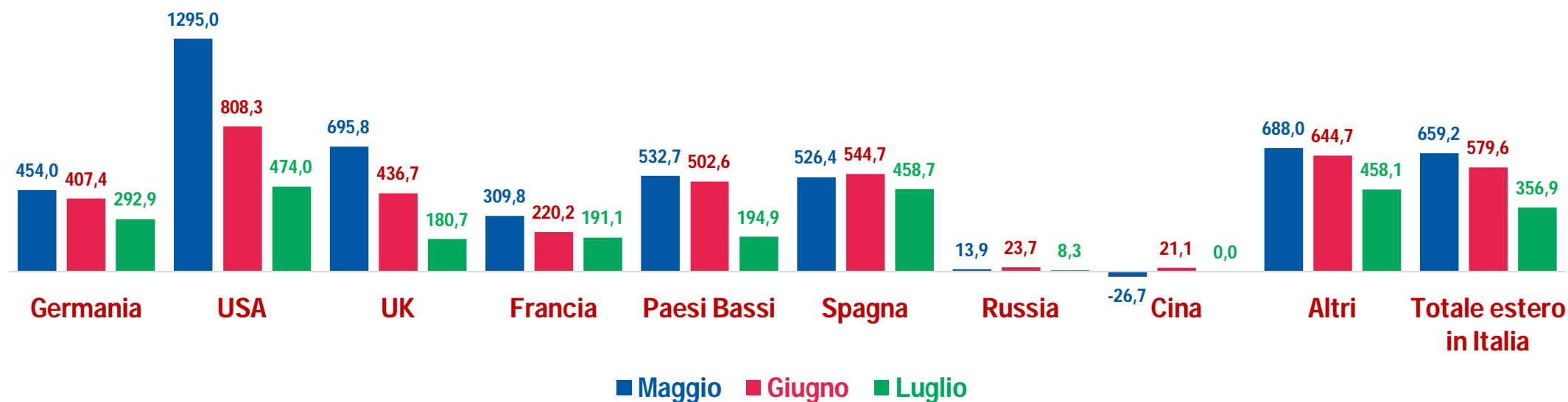
Average price on weekend of 20-22 May, booked on 16 May - B&B room for two
Product: FOOD AND WINE



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 18/05/2022

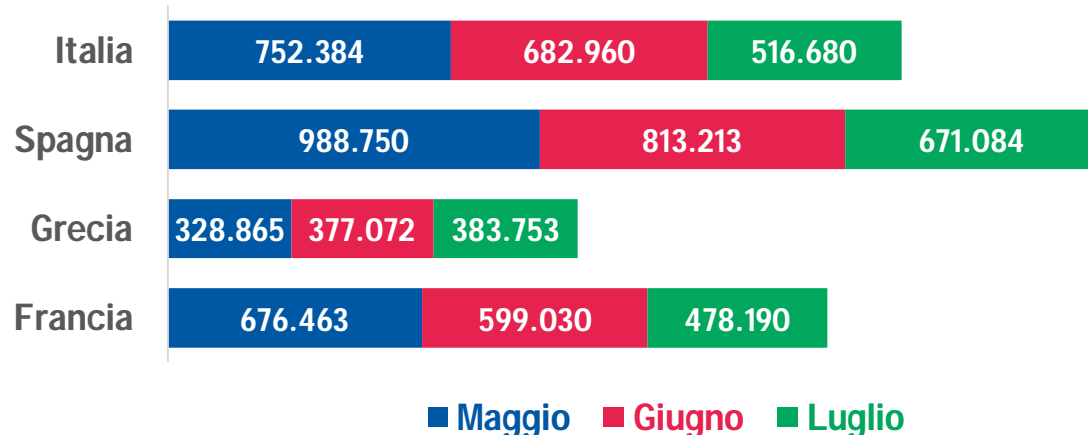


Overall, **bookings for flights from other countries to Italy are currently up on 2021 by 659.2% in May, 579.6% in June and 356.9% in July.** The **United States** are leading the way (May +1295%; June +808.3%). At present, bookings from China for June are up (+21.1%).

INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022

Flight bookings on 18/05/2022

Total international flights to Italy and competitors



Total international flight bookings, Italy and competitors

Var. % 2022/2021, as of 18/05/2022

Destination	May	June	July
Italy	659.2%	579.6%	356.9%
Spain	242.0%	273.8%	206.3%
Greece	300.8%	189.7%	123.3%
France	657.8%	514.1%	308.4%

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