

ENIT BULLETIN

In-depth analysis of trends in tourism

May W2

By the

Research Department

ENIT - ITALIAN NATIONAL TOURIST BOARD

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR INTERNATIONAL TRAVEL

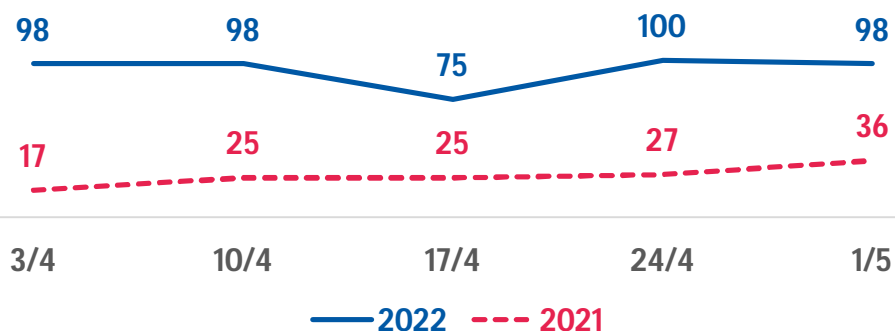
Destination by volume of interest in travel searches - Flight + accommodation						Growth by destination city - Flight + accommodation		
Area		Country		City				
Southern Europe	100	USA	100	London	100	1	Fort Lauderdale	More than 75%
Western Europe	58	Spain	99	Paris	85	2	Singapore	25% to 50%
North America	45	Italy	73	Dubai	74	3	Palma de Mallorca	
Western Asia	44	United Kingdom	66	New York	54	4	Bangkok	
Northern Europe	39	France	63	Barcelona	50	5	Ibiza	
South East Asia	25	Turkey	42	Amsterdam	49	6	Seville	
South Asia	22	UAE	42	Lisbon	48	7	Antalya	10% to 25%
Central America	19	Portugal	39	Rome	42	8	Athens	
Caribbean	17	Germany	36	Istanbul	40	9	Berlin	
North Africa	14	Mexico	36	Cancun	32	10	Vienna	
						13	Venice	

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

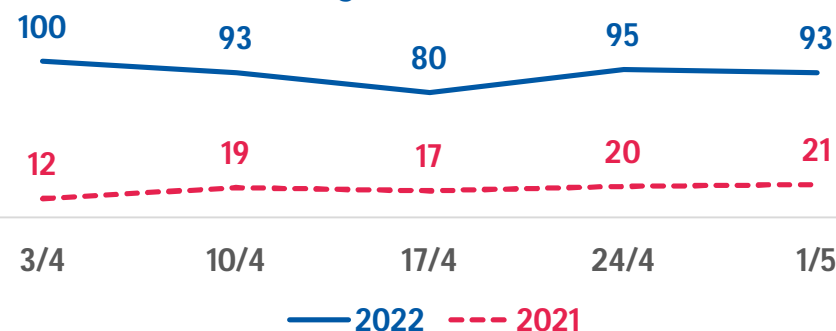
Source: ENIT Research Department using Google Destination Insights (for the period from 05/04/22 to 05/05/22, as recorded on 12/05/22) – All data is indexed

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

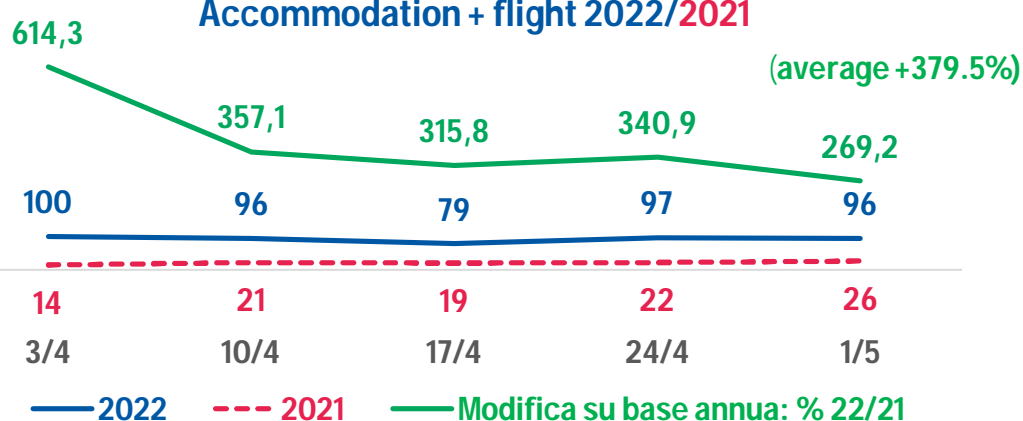
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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

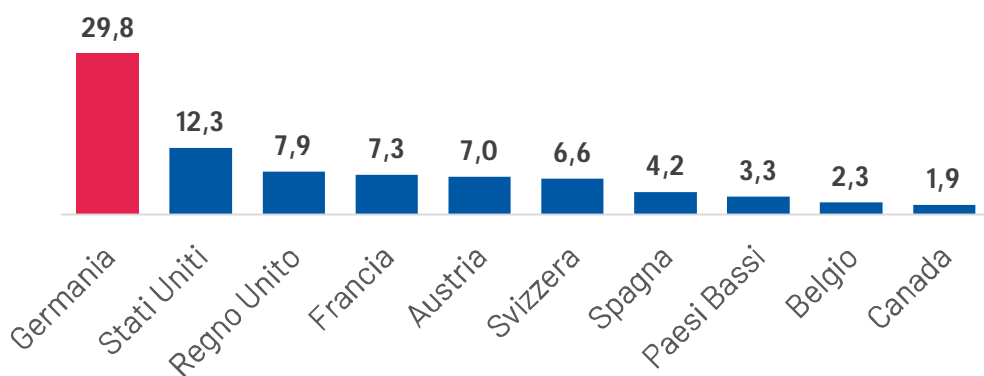


For the period analysed, the search data for travel to Italy shows that **interest peaked on 3 April**. Comparison with the same dates from 2021 shows that **the greatest variation (in %) was on the same day (+614.3%)**.

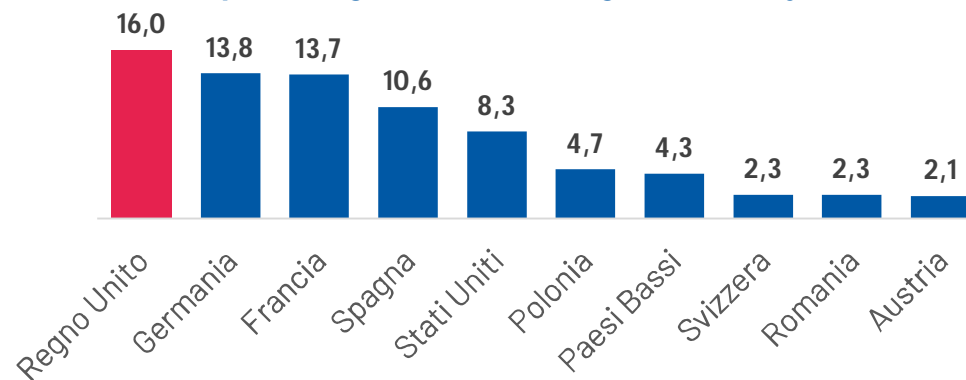
Source: ENIT Research Department using Google Destination Insights (for the period from 05/04/22 to 05/05/22, as recorded on 12/05/22)
- All data is indexed

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

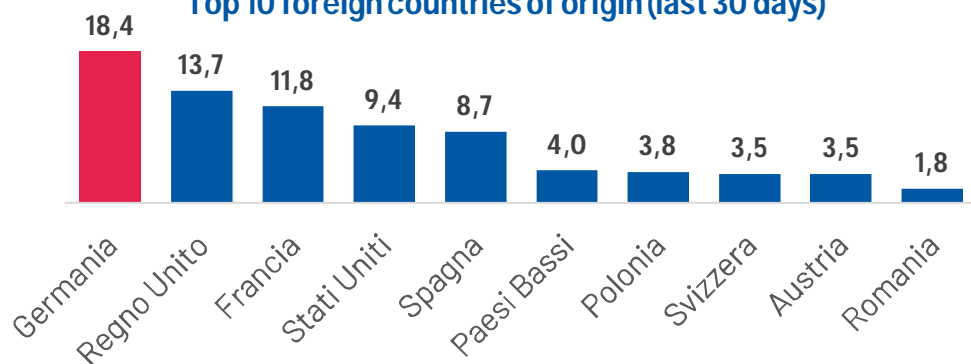
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)



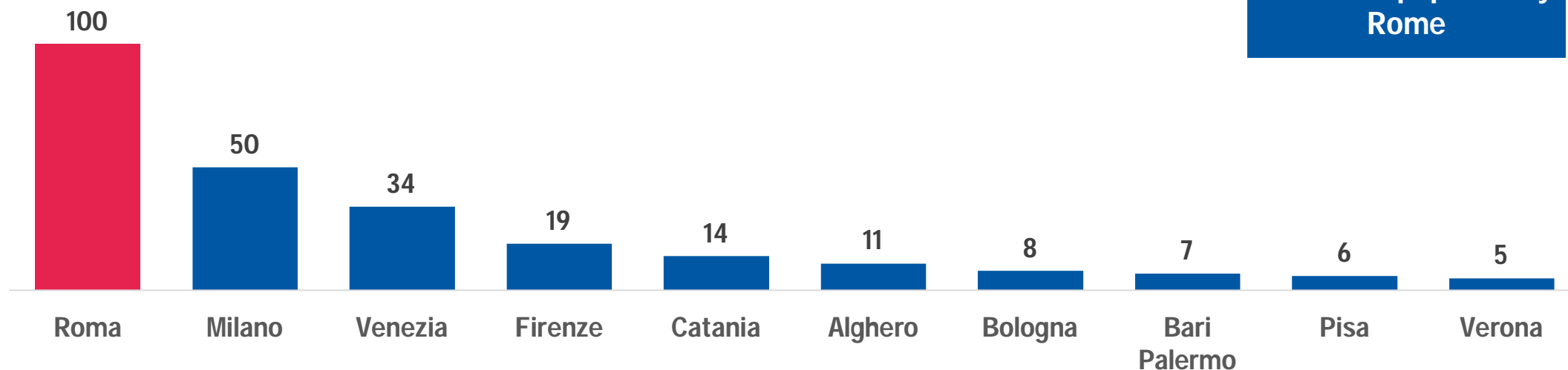
Country with greatest interest in incoming travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 05/04/22 to 05/05/22, as recorded on 12/05/22) – 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



More than 75%

Rimini

50% to 75%

Bibione, Lido di Jesolo, Bardolino, Lazise, Caorle, Trieste, Lignano Sabbiadoro, Peschiera del Garda, Riva del Garda, Porto Cervo, Sirmione, etc.

25% to 50%

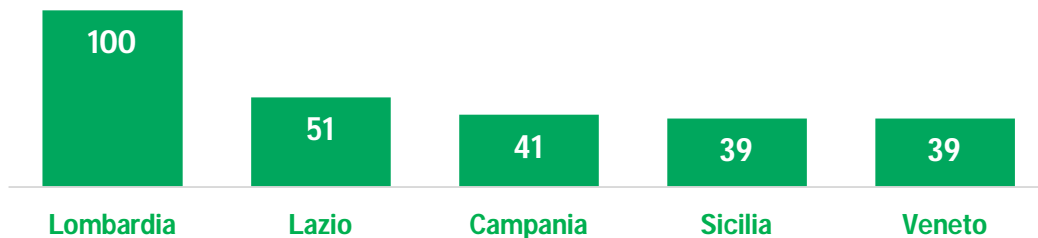
Catania, Alghero, Verona, Olbia, Cagliari, Brindisi, Sorrento, Lamezia Terme, Positano, Naples, Amalfi, Merano, Lacco Ameno, Taormina, Como, Pescara, Grado, Perugia, etc.

10% to 25%

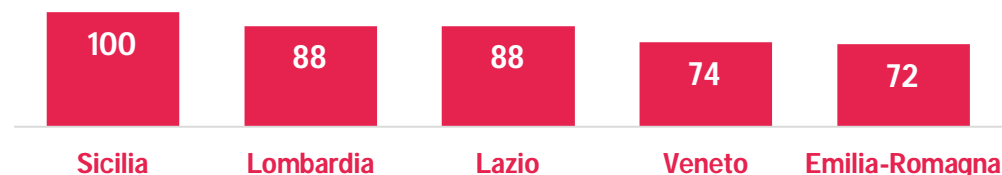
Rome, Milan, Venice, Florence, Bologna, Bari, Palermo, Pisa, Genoa, Bolzano, etc.

SEARCHES ON GOOGLE IN ITALY FOR TRAVEL IN ITALY

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



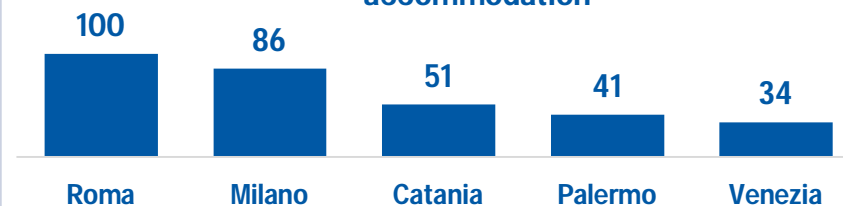
TOP 5 destination regions
in terms of volume of interest - Flight + accommodation



Growth for the main destinations, based on increased interest in consumer searches compared to a month ago

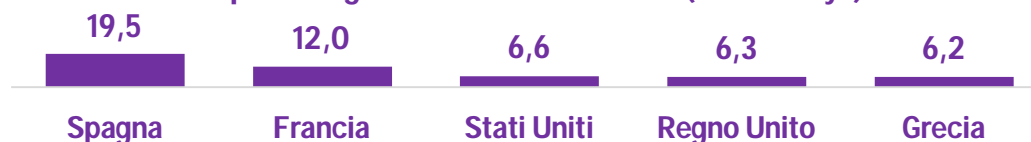
More than 75%	25% to 50%	10% to 25%
Cervia, Cesenatico, Lido di Jesolo, Cattolica, Igea Marina, Sorrento, Vieste, Caorle, Ischia, Castelnuovo del Garda, Lignano Sabbiadoro, Bibione, San Benedetto del Tronto	Cagliari, Alghero, Olbia, Naples, Brindisi, Genoa, Trapani, Ancona, Crotona, Bolzano, Torre San Giovanni	Rome, Milan, Catania, Palermo, Venice, Florence, Bari, Bologna, Verona, Lamezia Terme, Pisa, Trieste, Turin, Perugia, Pescara, Reggio Calabria, Padua
50% to 75%		
Rimini, Riccione, Pantelleria, Syracuse		

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)

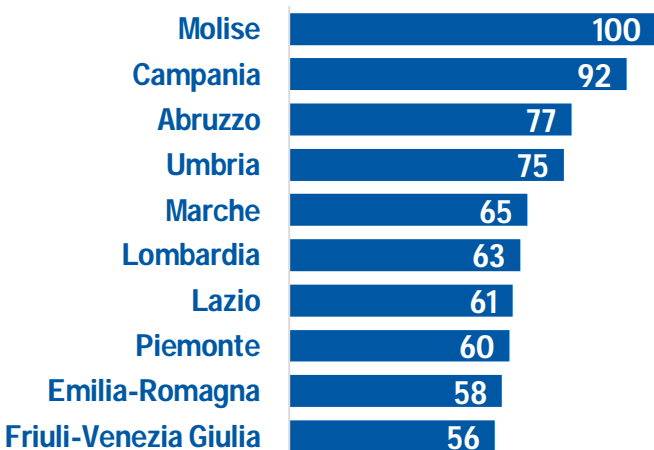
Travelling abroad



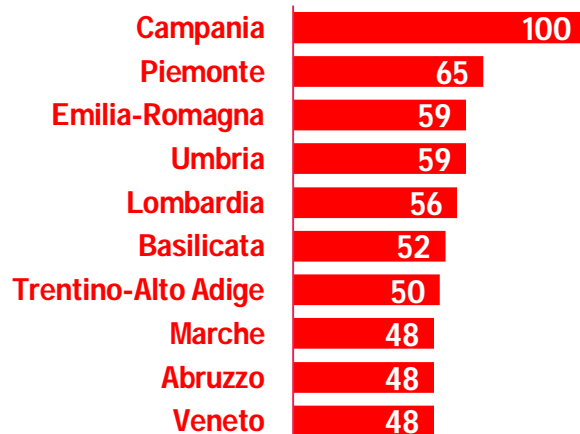
Source: ENIT Research Department using Google Destination Insights (for the period from 05/04/22 to 05/05/22, as recorded on 12/05/22) - All data is indexed

GOOGLE SEARCHES FOR ITALY – HOLIDAYS

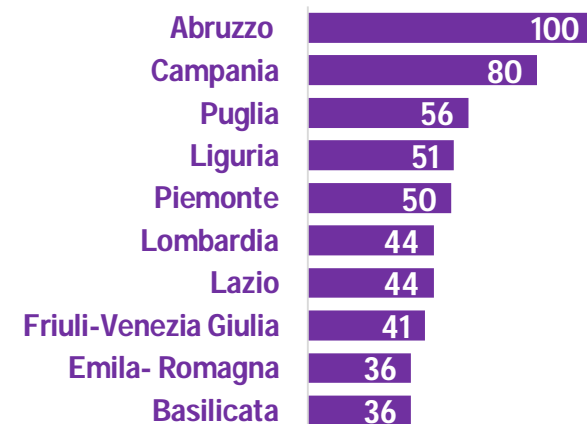
Holiday searches
Travel category: interest by region



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: airport +350%; summer holidays +90%
Place/municipality/region: Castellabate +650%; Paestum +550%; Calabria +60%; Marina di Camerota +60%

In other countries

City/Island/Country: Croatia +180%; Egypt +120%; Zante +90%; Seychelles +60%; Mallorca +50%

Most searched

Subject: holiday, home, flight, travel, summer, cost, holidays
Accommodation facility: holiday home, apartment
Place: Paestum
Month: August, June
In other countries
City/Island/Country: Greece, Mallorca, Corfu, Canary Islands, Crete

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 12/05/2022

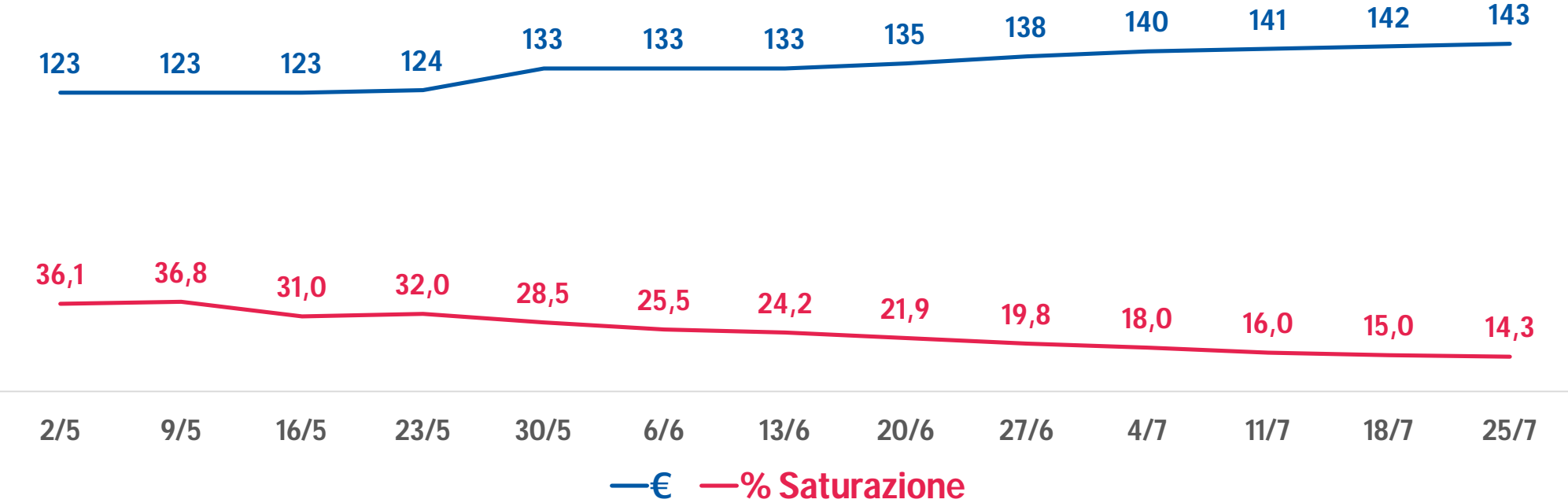
Product	May		June		July	
	2022	2021	2022	2021	2022	2021
Total for Italy	33.2	30.0	24.5	24.2	16.3	30.1
Mountains	28.7	32.5	22.2	20.4	22.0	29.3
Art and culture	40.0	26.3	26.5	23.0	14.3	26.3
Beach	26.6	41.3	25.1	28.2	20.4	39.4
Lake	30.7	34.7	34.0	27.8	16.5	41.1
Spa	26.2	34.6	20.2	24.8	18.4	29.6
Other	24.5	18.7	14.7	18.3	9.7	20.9

Bookings for accommodation facilities through Online Travel Agencies currently stand at 33.2% of the capacity for the month of May, which is 3.2 percentage points more than last year. "Cultural" bookings (40.0%) are above the national average and have made up ground compared to last year (+13.7%).

At present, bookings cover 24.5% of the capacity for June. The highest figures and biggest increases concern lakes (34.0% and +6.2%) and artistic and cultural towns and cities (26.5% and +3.5%). The occupancy rate for the month of July stands at 16.3%. Leading the drive on this front are bookings for the mountains (22.0%), beach resorts (20.4%) and spas (18.4%).

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

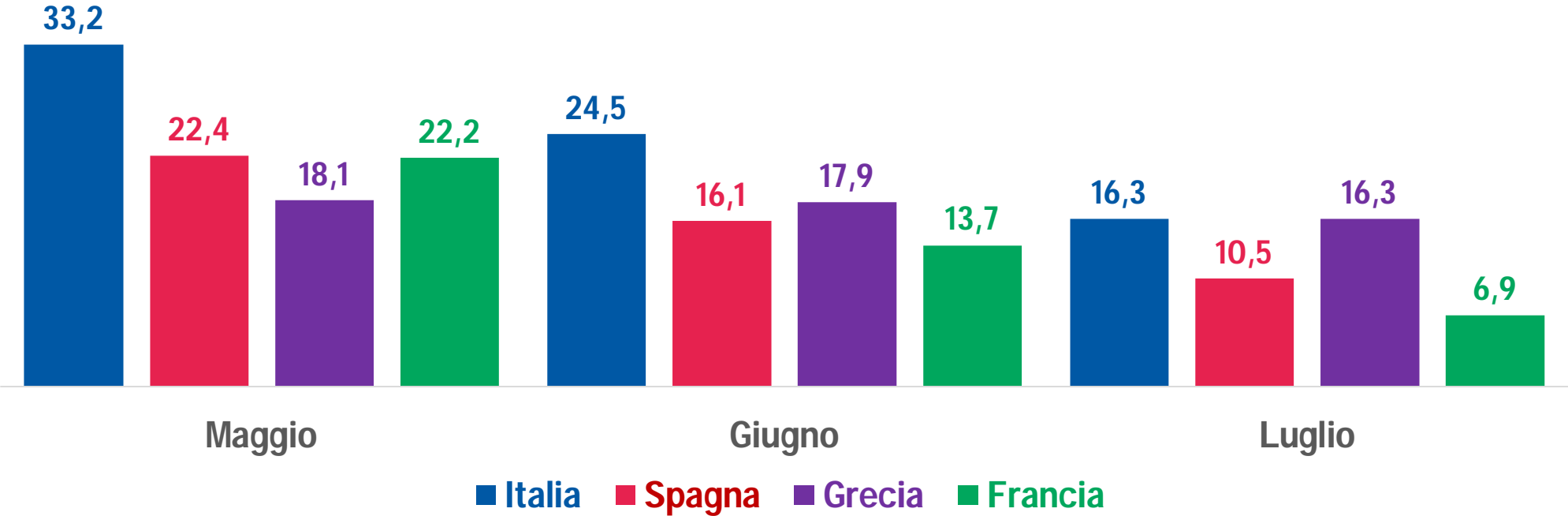
Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 12/05/2022 - Weekly data



Source: ENIT Research Department using The Data Appeal Company data

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING/SUMMER 2022

% occupancy of accommodation
in OTA channels on 12/05/2022 - Italy and competitors



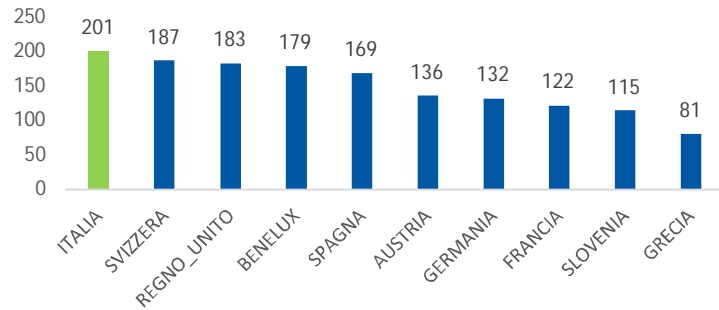
Source: ENIT Research Department using The Data Appeal Company data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

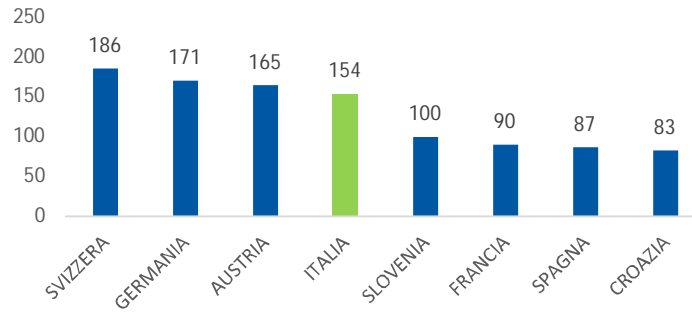
3RD WEEKEND IN MAY

HOTEL

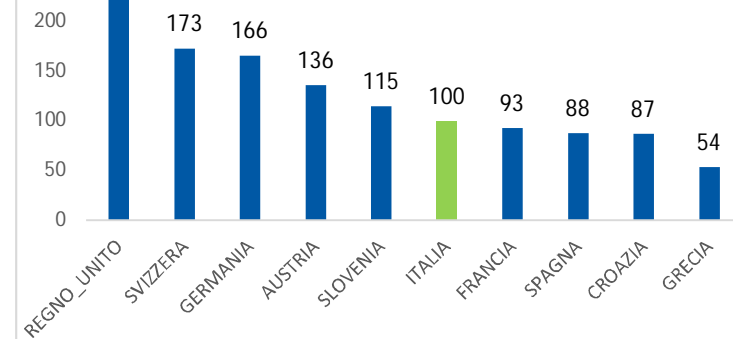
Average price on weekend of 13-15 May, booked on 9 May - Hotel room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



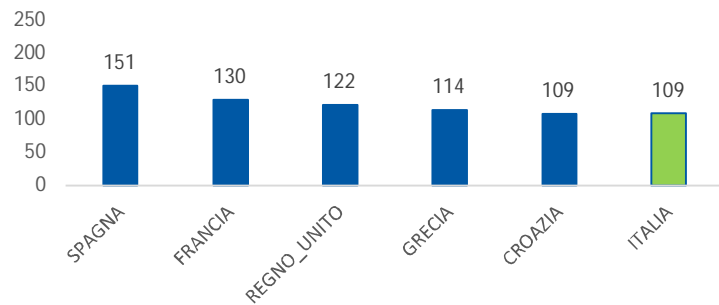
Average price on weekend of 13-15 May, booked on 9 May - Hotel room for two
Product: MOUNTAINS



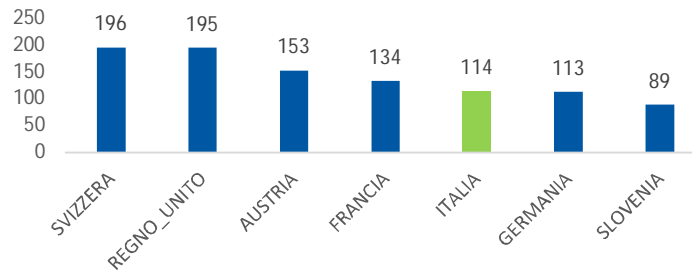
Average price on weekend of 13-15 May, booked on 9 May - Hotel room for two
Product: SPA



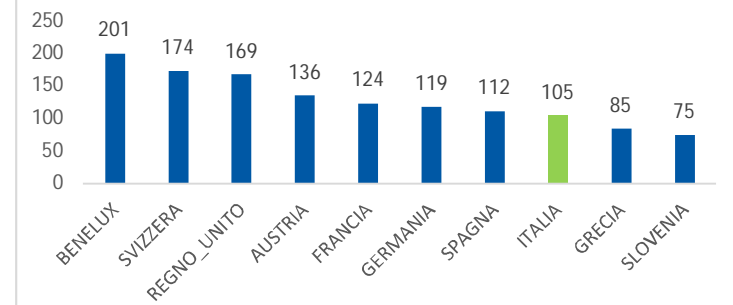
Average price on weekend of 13-15 May, booked on 9 May - Hotel room for two
Product: BEACH



Average price on weekend of 13-15 May, booked on 9 May - Hotel room for two
Product: LAKE



Average price on weekend of 13-15 May, booked on 9 May - Hotel room for two
Product: FOOD AND WINE



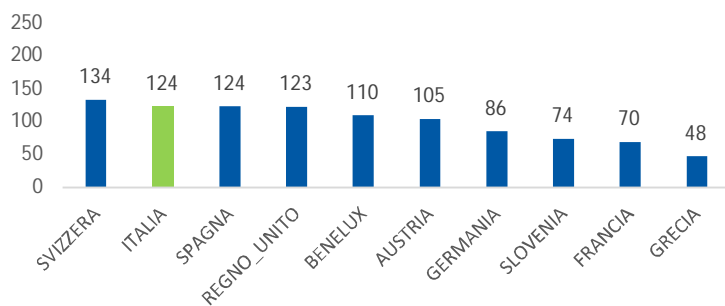
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

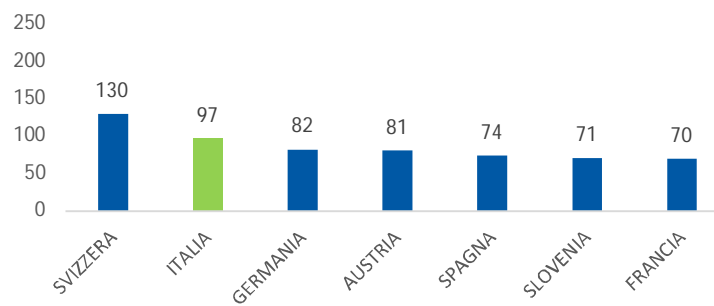
3RD WEEKEND IN MAY

GUEST HOUSES

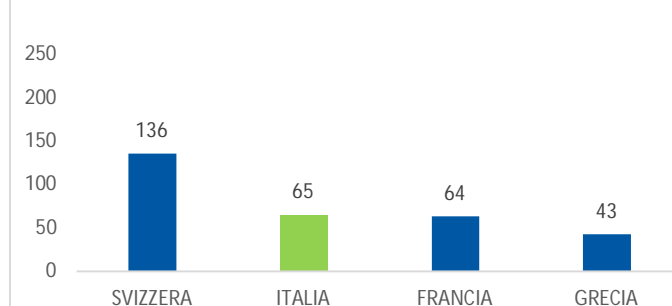
Average price on weekend of 13-15 May, booked on 9 May - Guest house room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



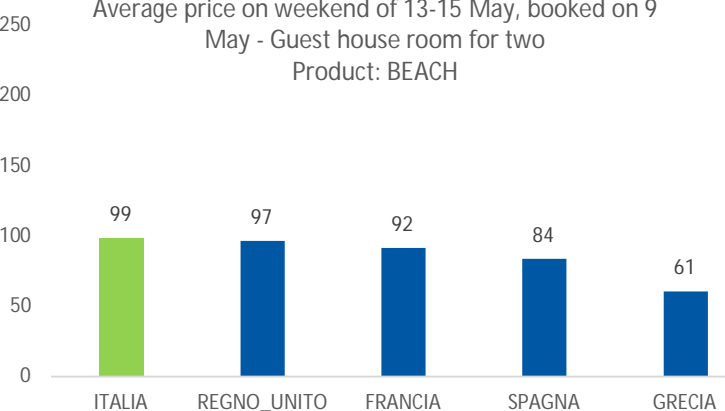
Average price on weekend of 13-15 May, booked on 9 May - Guest house room for two
Product: MOUNTAINS



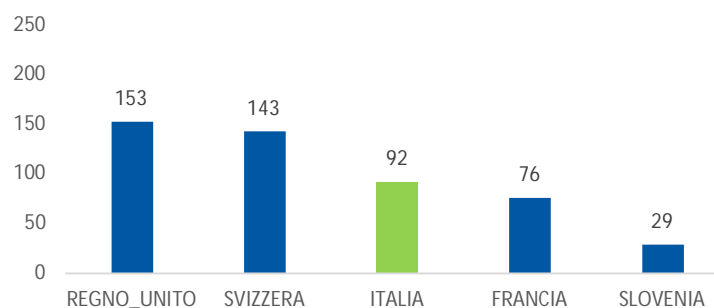
Average price on weekend of 13-15 May, booked on 9 May - Guest house room for two
Product: SPA



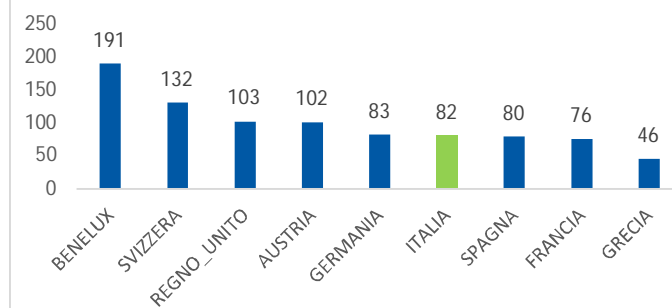
Average price on weekend of 13-15 May, booked on 9 May - Guest house room for two
Product: BEACH



Average price on weekend of 13-15 May, booked on 9 May - Guest house room for two
Product: LAKE



Average price on weekend of 13-15 May, booked on 9 May - Guest house room for two
Product: FOOD AND WINE



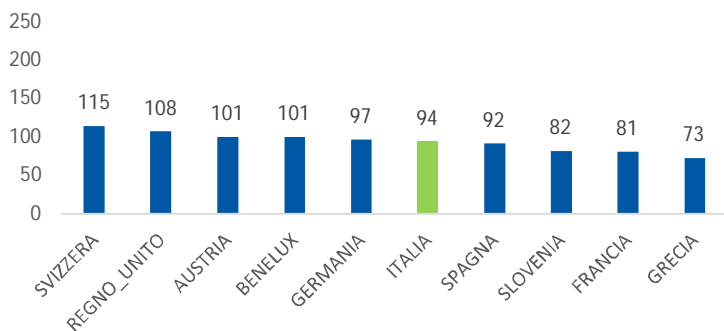
Source: ENIT Research Department using Remtene data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

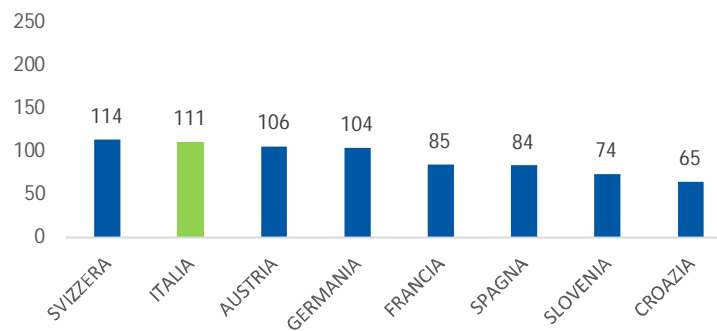
3RD WEEKEND IN MAY

B&Bs

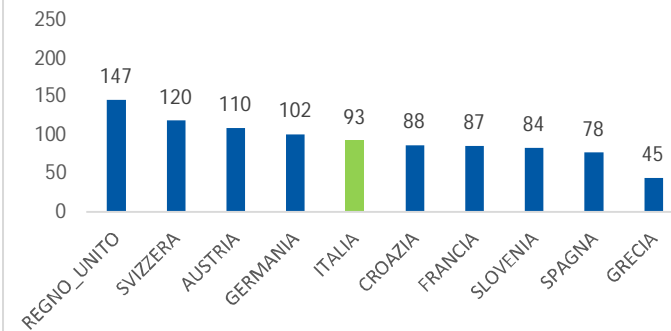
Average price on weekend of 13-15 May, booked on 9 May - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



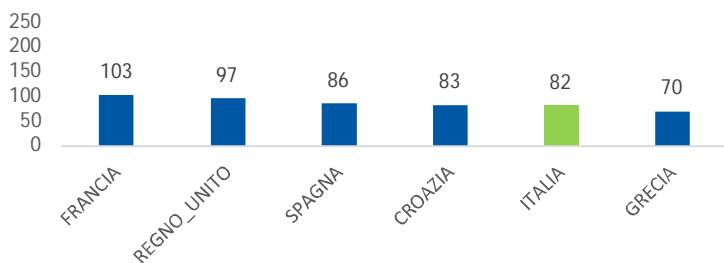
Average price on weekend of 13-15 May, booked on 9 May - B&B room for two
Product: MOUNTAINS



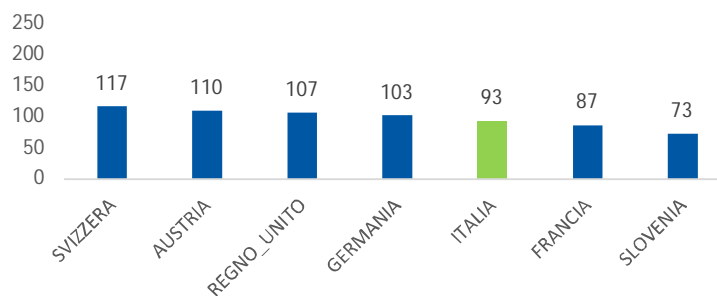
Average price on weekend of 13-15 May, booked on 9 May - B&B room for two
Product: SPA



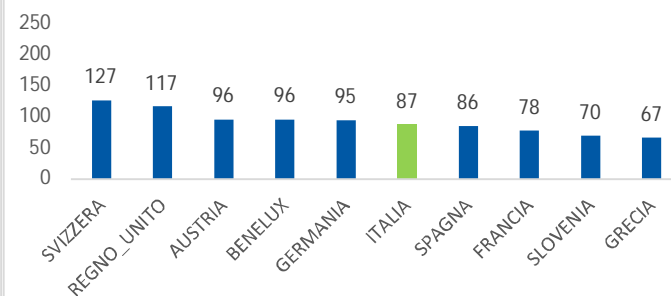
Average price on weekend of 13-15 May, booked on 9 May - B&B room for two
Product: BEACH



Average price on weekend of 13-15 May, booked on 9 May - B&B room for two
Product: LAKE



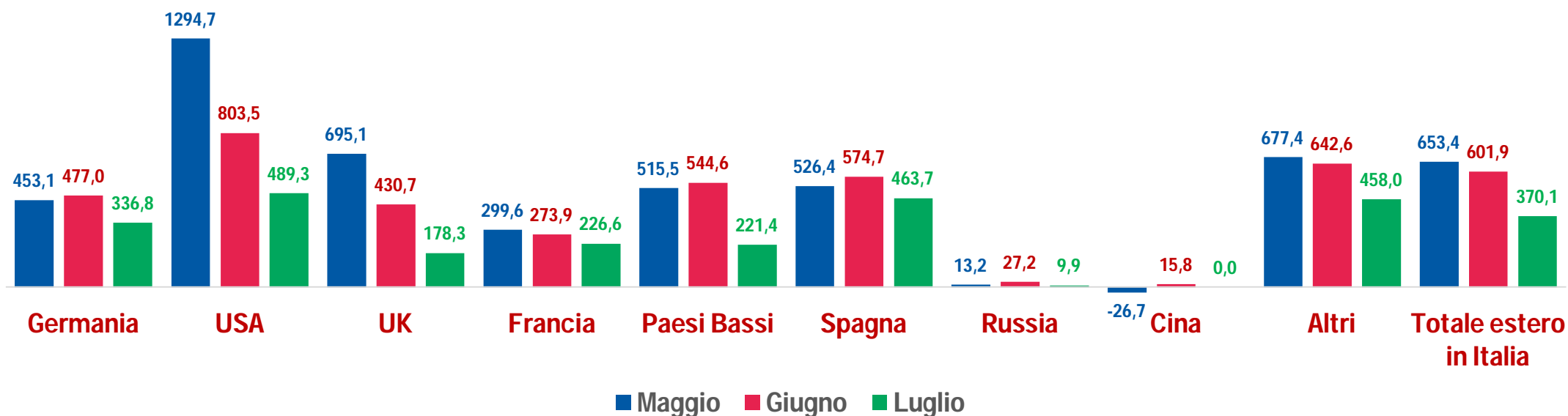
Average price on weekend of 13-15 May, booked on 9 May - B&B room for two
Product: FOOD AND WINE



Source: ENIT Research Department using Remtene data

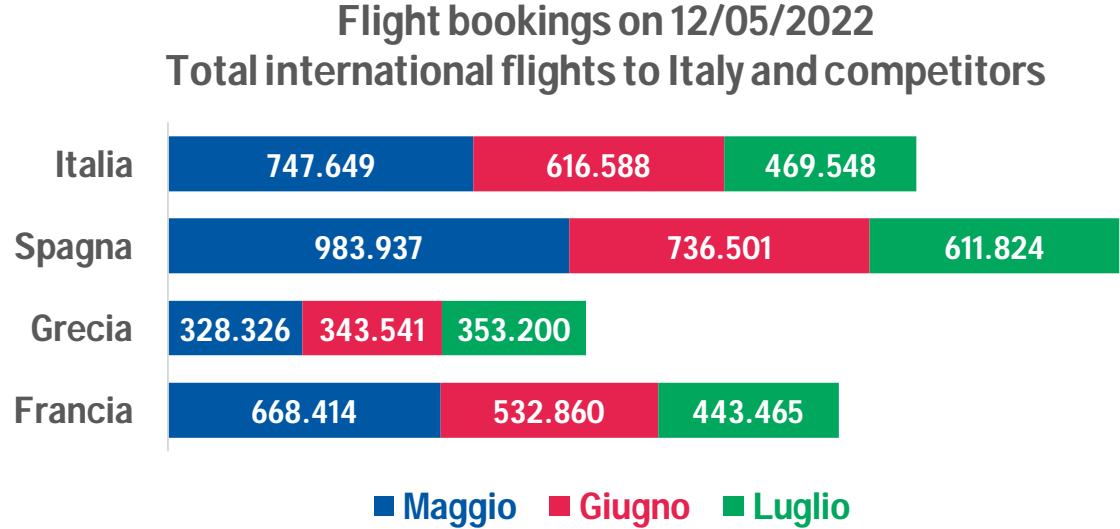
INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022

Bookings of flights to Italy by country of origin
Var. % 2022/2021, as of 12/05/2022



Overall, **bookings for flights from other countries to Italy are currently up on 2021 by 653.4% in May, 601.9% in June and 370.1% in July.** The **United States** are leading the way (May +1294.5%; June +803.5%). At present, bookings from China for June are up (+15.8%).

INTERNATIONAL FLIGHT BOOKINGS SPRING/SUMMER 2022



Total international flight bookings, Italy and competitors
Var. % 2022/2021, as of 12/05/2022

Destination	May	June	July
Italy	653.4%	601.8%	370.1%
Spain	238.0%	309.9%	216.7%
Greece	298.9%	206.1%	135.0%
France	643.5%	542.0%	324.1%

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

Source: ENIT Research Department using Forward Data – updated on 01/05/2022