

ENIT BULLETIN

In-depth analysis of trends in tourism

May 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						Growth by destination city - Flight + accommodation		
Area		Country		City				
Southern Europe	100	USA	100	London	100	1	Antalya	50% to 75%
Western Europe	59	Spain	96	Paris	84	2	Singapore	25% to 50%
North America	47	Italy	72	Dubai	78	3	Palma de Mallorca	
Western Asia	47	United Kingdom	65	New York	53	4	Bangkok	
Northern Europe	40	France	61	Barcelona	51	5	Athens	
South East Asia	25	UAE	43	Amsterdam	50	6	Doha	
South Asia	23	Turkey	40	Lisbon	49	7	Prague	
Central America	20	Portugal	39	Rome	43	8	Larnaca	
Caribbean	18	Mexico	37	Istanbul	40	9	Munich	
North Africa	14	India	37	Cancun	34	10	Ibiza	

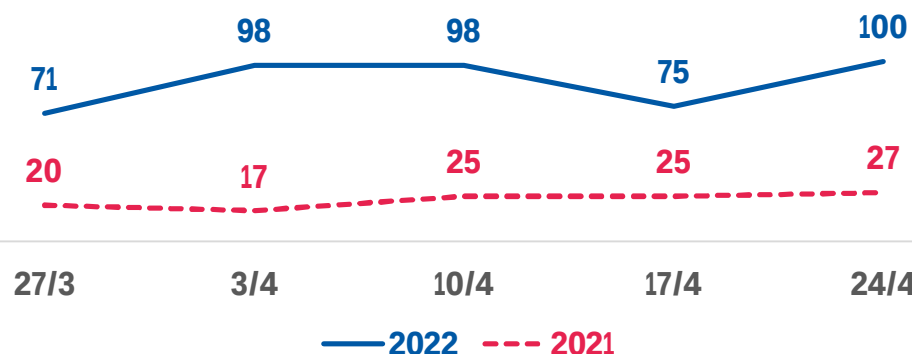
Destinations with the fastest growth in the world in terms of interest in travel

More than 75%
Greece

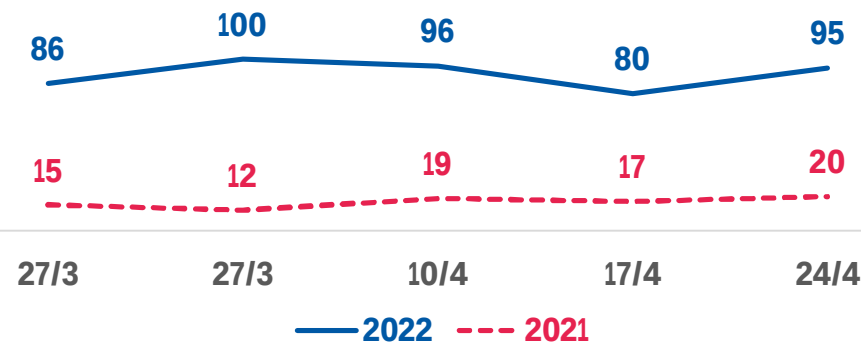
Source: ENIT Research Department using Google Destination Insights (for the period from 27/03/22 to 28/04/22, as recorded on 05/05/22) – All data is indexed

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

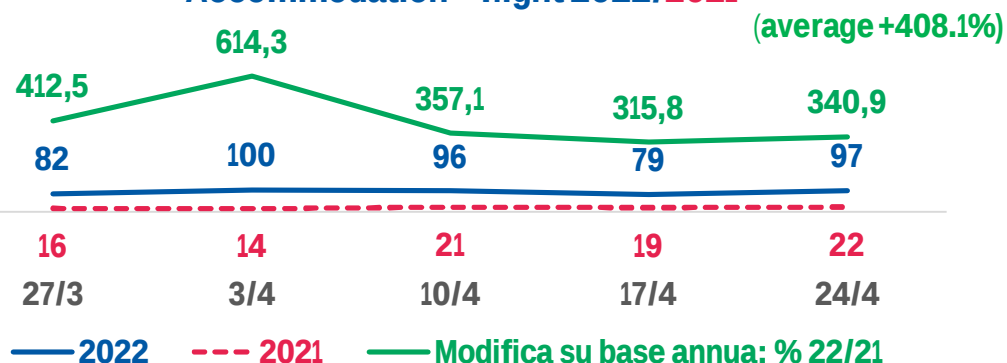
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



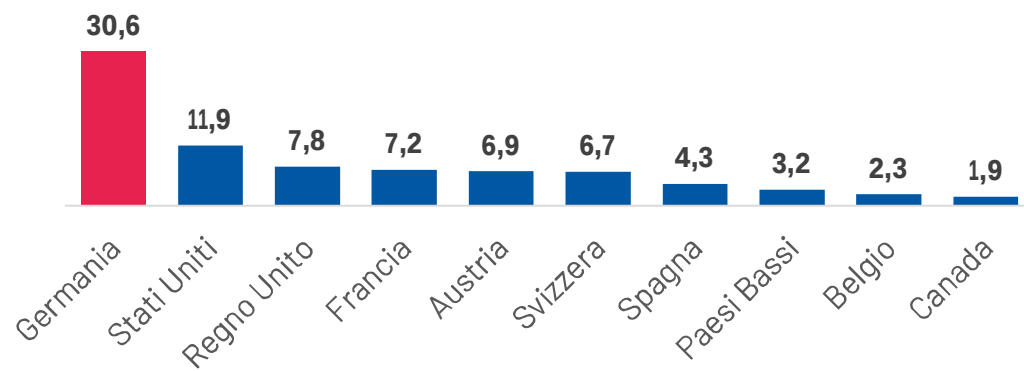
Search interest in travel to Italy
Accommodation + flight 2022/2021



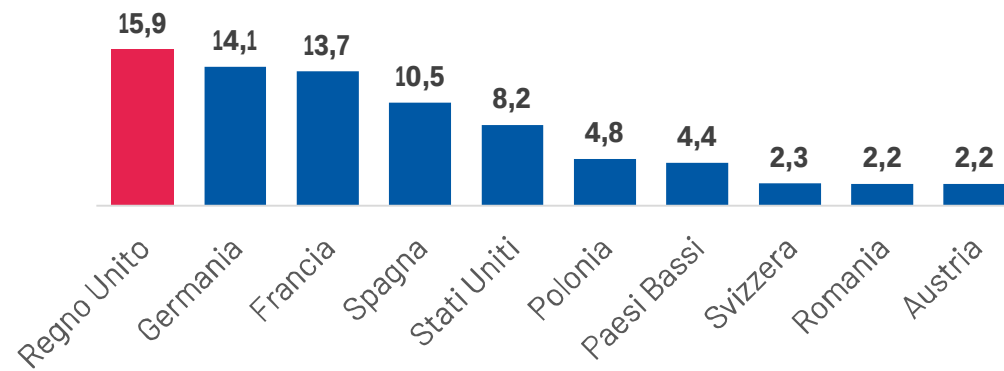
For the period analysed, the search data for travel to Italy shows that **interest peaked on 3 April**. Comparison with the same dates from 2021 shows that **the greatest variation (in %) was on the same day (+614.3%)**.

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

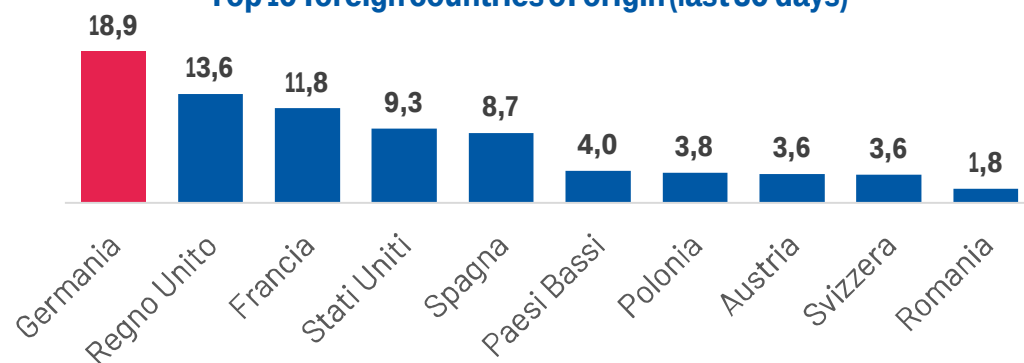
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)



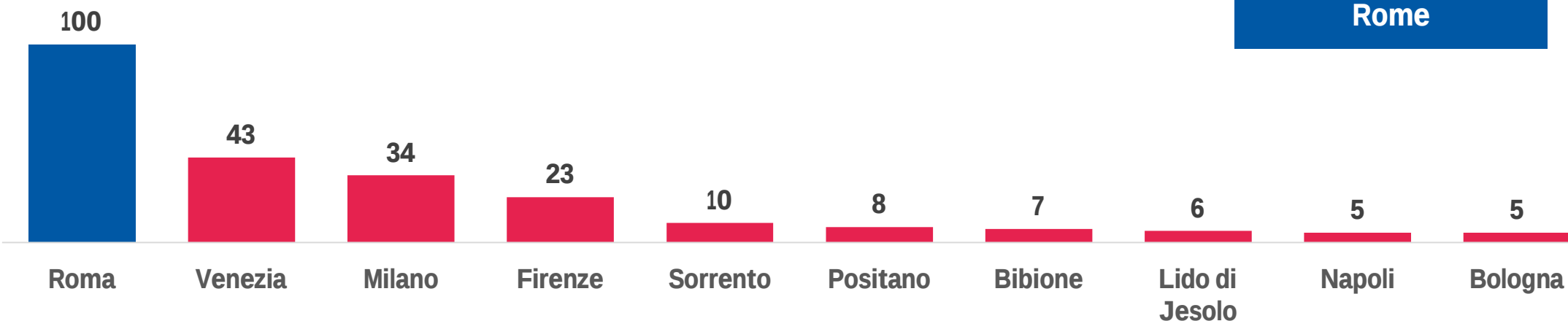
**Country with greatest
interest in incoming
travel: Germany**

SEARCHES ON GOOGLE IN OTHER COUNTRIES FOR TRAVEL TO ITALY

Volume of interest

Main destination cities: Flight + accommodation

Most
searched/popular city
Rome



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



More than 75%
Torri del Benaco

50% to 75%
Bardolino, Lido di Jesolo, Lazise, Lignano
Sabbiadoro, Rimini, Peschiera del Garda,
Verona, Sirmione, Porto Cervo, Pisa, Bari,
Catania, etc.

25% to 50%

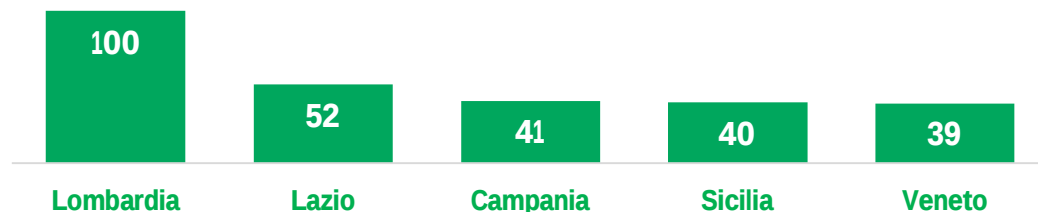
Venice, Florence, Sorrento, Positano,
Bibione, Naples, Caorle, Bologna,
Amalfi, Merano, Palermo, Taormina,
Como, Grado, Genoa, Turin, etc.

10% to 25%
Rome, Milan,
Lacco Ameno

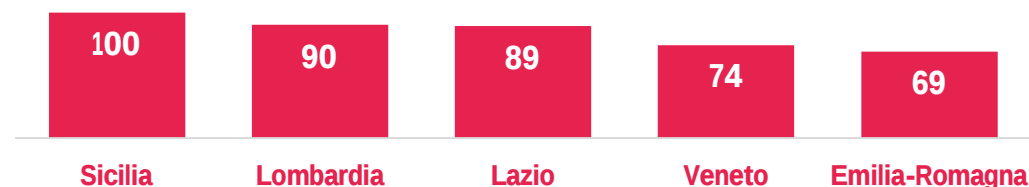
Source: ENIT Research Department using Google Destination Insights (for the period from 27/03/22 to 28/04/22, as recorded on 05/05/22) – All data is indexed

SEARCHES ON GOOGLE IN ITALY FOR TRAVEL IN ITALY

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



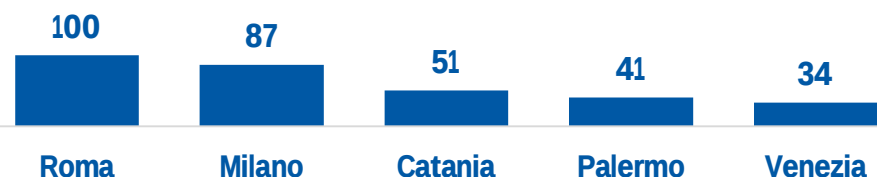
TOP 5 destination regions
in terms of volume of interest – Flight + accommodation



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

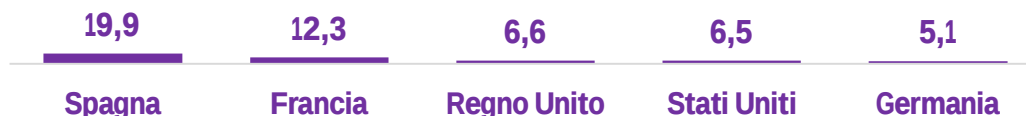
More than 75%	25% to 50%	10% to 25%
Cervia, Lido di Jesolo, Cattolica, Igea Marina, Sorrento, Castelnuovo del Garda, Ischia, Lignano Sabbiadoro, Bibione	Rome, Catania, Palermo, Florence, Cagliari, Alghero, Verona, Naples, Brindisi, Genoa, Pisa, Trapani, Perugia, Pescara, Ancona, Crotone	Milan, Venice,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

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)

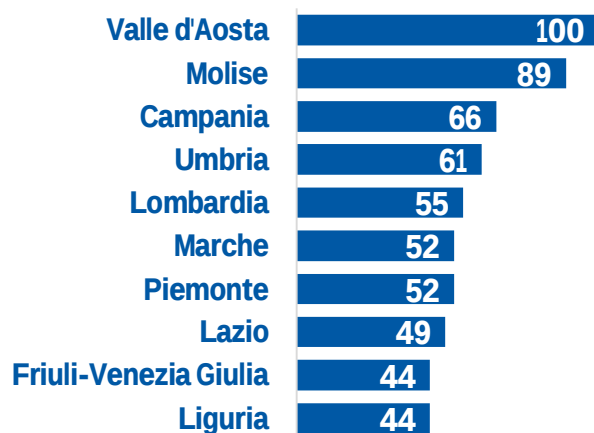
Travelling abroad



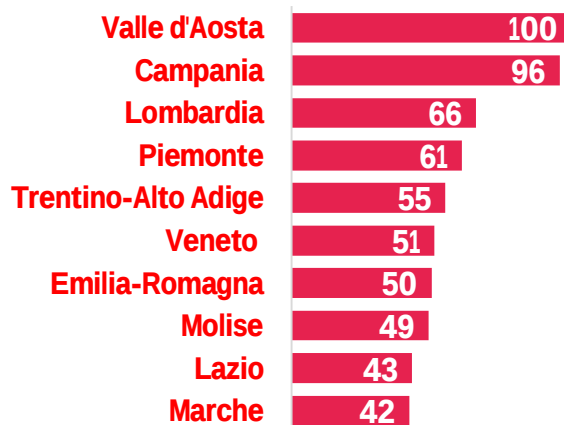
Source: ENIT Research Department using Google Destination Insights (for the period from 27/03/22 to 28/04/22, as recorded on 05/05/22) – All data is indexed

GOOGLE SEARCHES FOR ITALY – HOLIDAYS

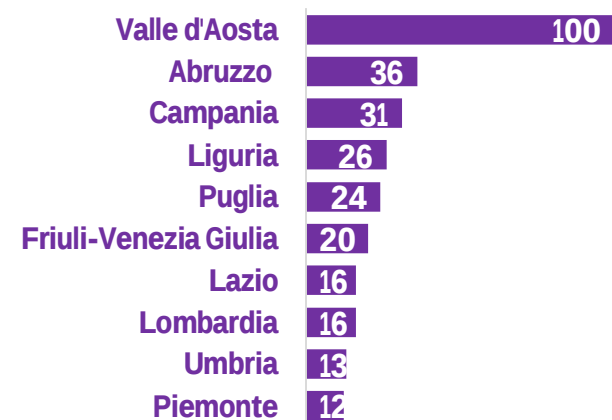
Holiday searches
Travel category: interest by region



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 +600%; low-cost airline +400%; discounts and deals +190%; flight +40%
Month: September +60%
Place: Paestum +140%

In other countries

City/Island/Country: Tunisia +140%; Zanzibar +140%; Cape Verde +60%

Most searched

Subject: holiday, home, flight, travel, summer, cost, holidays
Accommodation facility: holiday home
Place: Cilento
Month: August, May, June, September

In other countries

City/Island/Country: Mallorca, Maldives, Corfu, Tunisia

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 2022 (compared with 2021)

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

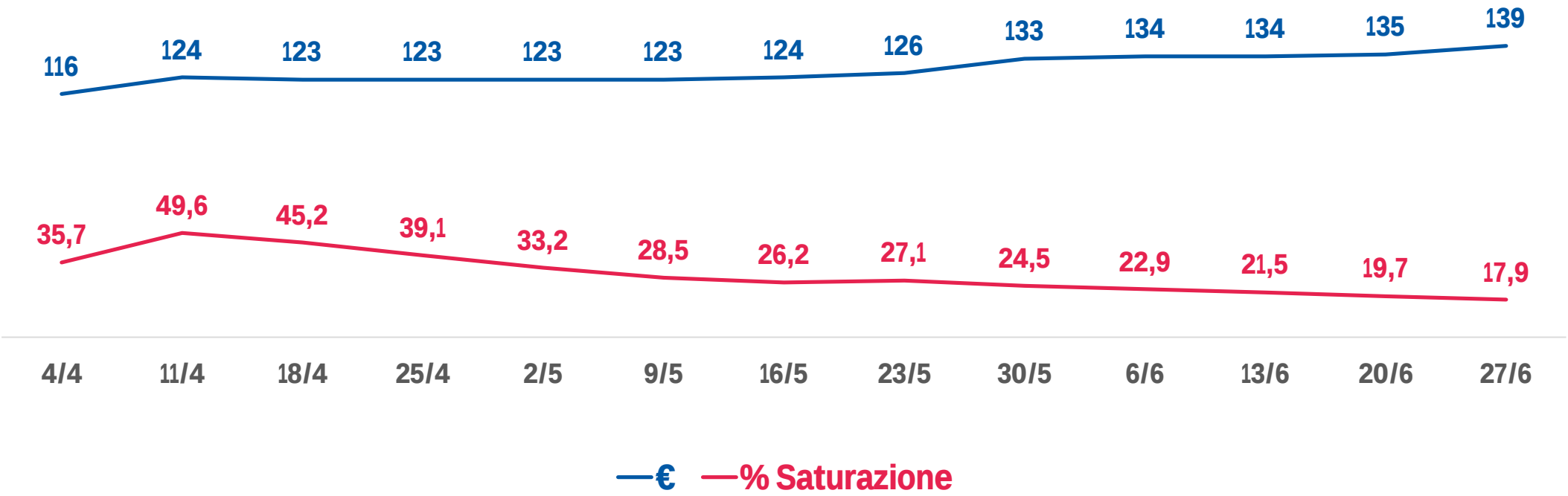
Product	April		May		June	
	2022	2021	2022	2021	2022	2021
Total for Italy	41.7	36.7	28.3	30.0	21.8	24.2
Mountains	42.1	49.5	25.8	32.4	21.1	20.1
Art and culture	46.8	32.8	33.8	26.3	23.1	23.0
Beach	35.7	48.4	23.1	41.4	22.7	28.4
Lake	39.4	63.9	28.1	34.7	31.3	27.8
Spa	37.2	42.3	23.1	34.6	18.6	24.8
Other	32.9	27.7	19.8	18.6	12.9	18.4

Bookings for accommodation facilities through Online Travel Agencies reached 41.7% of the capacity for the month of April, which is 5 percentage points more than last year. **They are above the national average in the fields of culture (46.8%) and mountains (42.1%). Compared to last year, ground has been made up by artistic and cultural towns and cities (+14%), along with the overall figure.**

At present, **bookings cover 28.3% of the capacity for May. The highest figures are for artistic and cultural towns and cities (33.8%), lakes (28.1%) and the mountains (25.8%).** The occupancy rate for **June** currently stands at **21.8%.** **Bookings for lakes are leading the drive on this front (31.3%).**

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING 2022

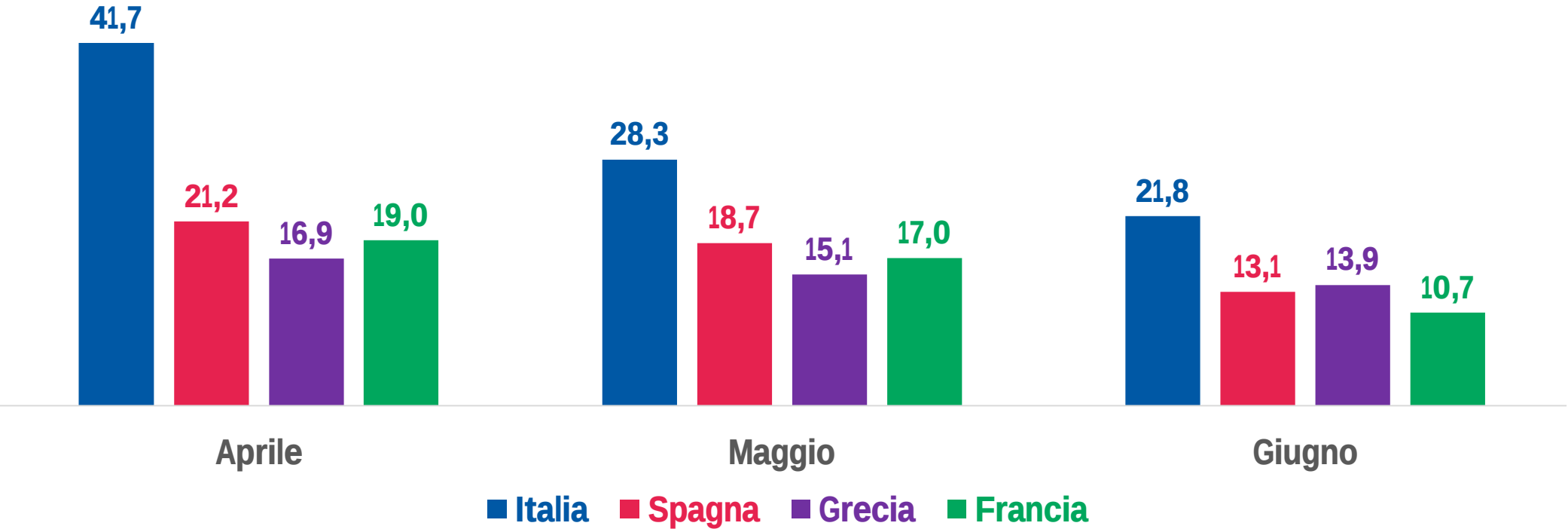
Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 05/05/2022 - Weekly data



Source: ENIT Research Department using The DataAppeal Company data

ACCOMMODATION BOOKINGS THROUGH OTAS SPRING 2022

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



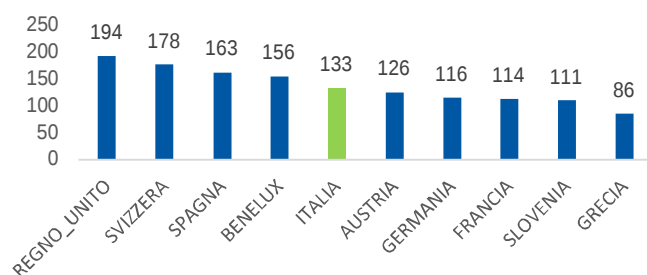
Source: ENIT Research Department using The Data Appeal Company data

INTERNATIONAL PRICE COMPARISON - SPRING 2022

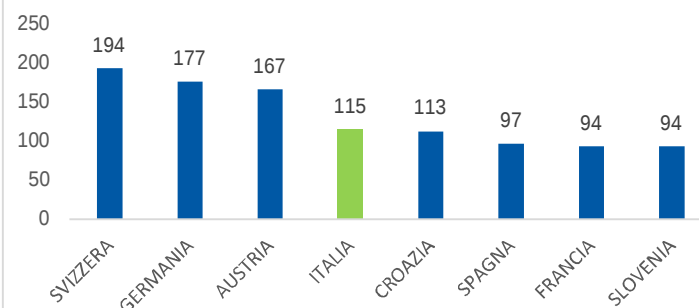
2ND WEEKEND IN MAY

HOTEL

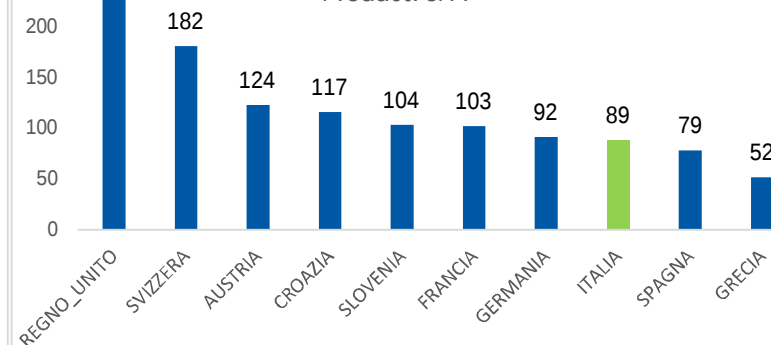
Average price on weekend of 6-8 May, booked on 2 May - Hotel room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



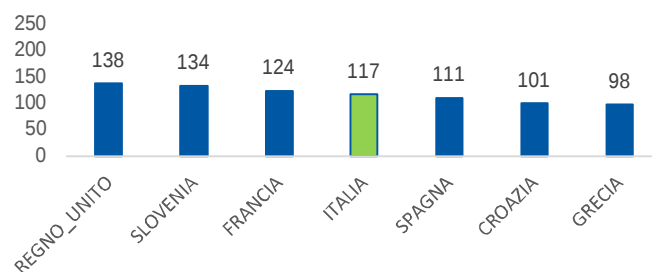
Average price on weekend of 6-8 May, booked on 2 May - Hotel room for two
Product: MOUNTAINS



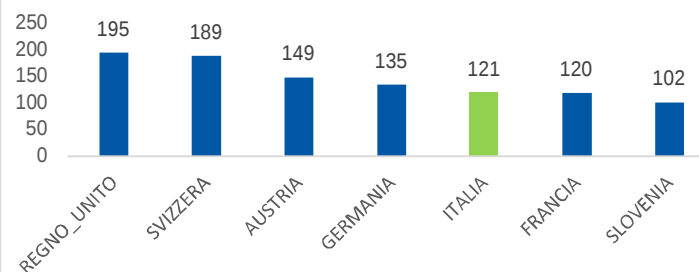
Average price on weekend of 6-8 May, booked on 2 May - Hotel room for two
Product: SPA



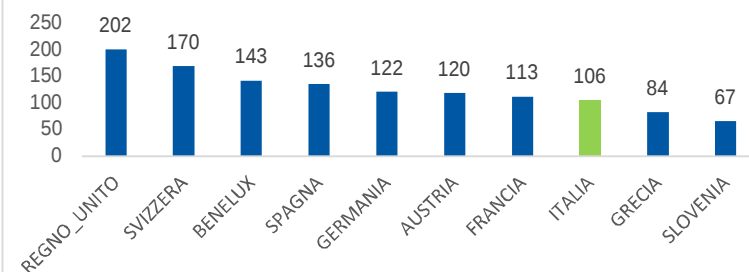
Average price on weekend of 6-8 May, booked on 2 May - Hotel room for two
Product: BEACH



Average price on weekend of 6-8 May, booked on 2 May - Hotel room for two
Product: LAKE



Average price on weekend of 6-8 May, booked on 2 May - Hotel room for two
Product: FOOD AND WINE



Source: ENIT Research Department using Remtene data

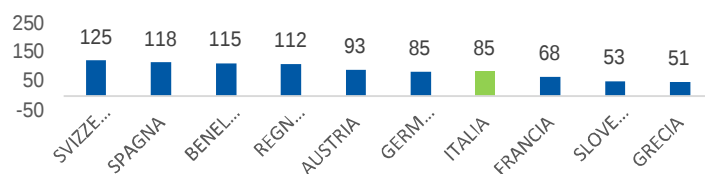
INTERNATIONAL PRICE COMPARISON - SPRING 2022

2ND WEEKEND IN MAY

GUEST HOUSES

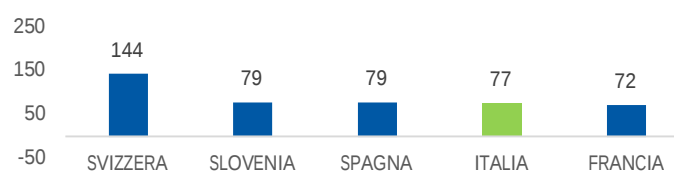
Average price on weekend of 6-8 May,
booked on 2 May - Guest house room for
two

Product: ARTISTIC AND CULTURAL...



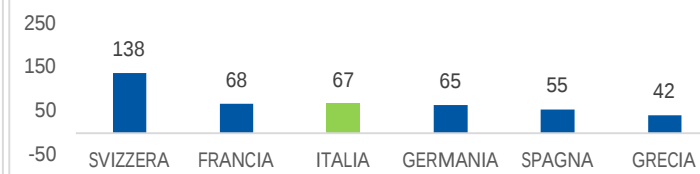
Average price on weekend of 6-8 May,
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two

Product: MOUNTAINS



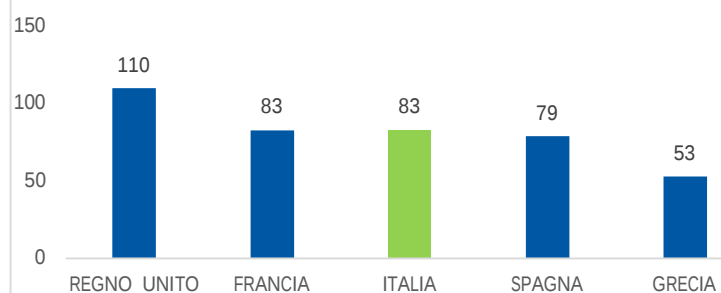
Average price on weekend of 6-8 May,
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two

Product: SPA



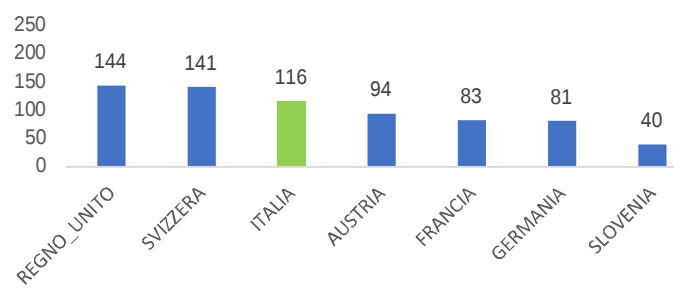
Average price on weekend of 6-8 May,
booked on 2 May - Guest house room for
two

Product: BEACH



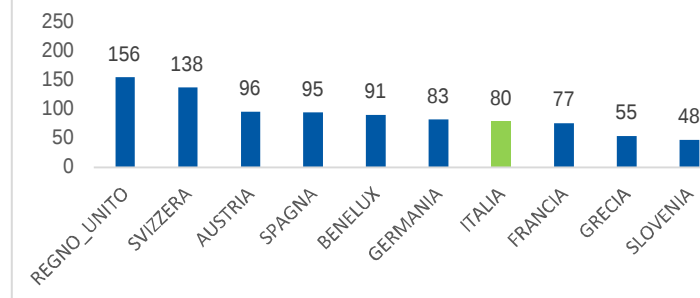
Average price on weekend of 6-8 May,
booked on 2 May - Guest house room for
two

Product: LAKE



Average price on weekend of 6-8 May,
booked on 2 May - Guest house room for
two

Product: FOOD AND WINE

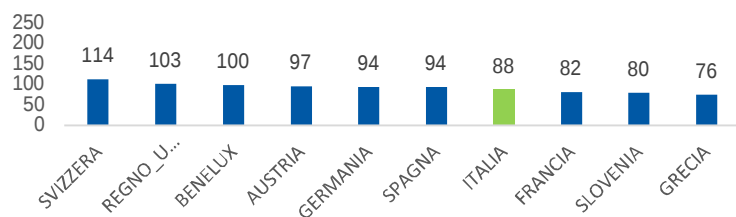


INTERNATIONAL PRICE COMPARISON - SPRING 2022

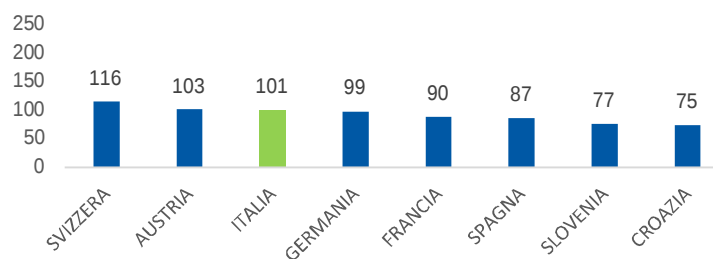
2ND WEEKEND IN MAY

B&Bs

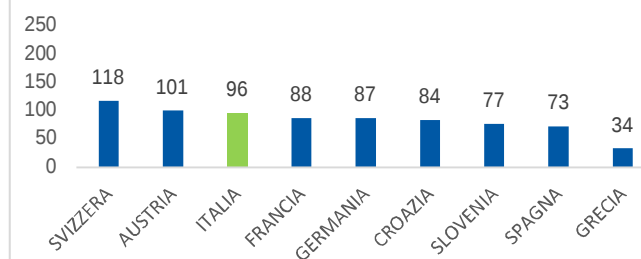
Average price on weekend of 6-8 May,
booked on 2 May - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS
AND CITIES



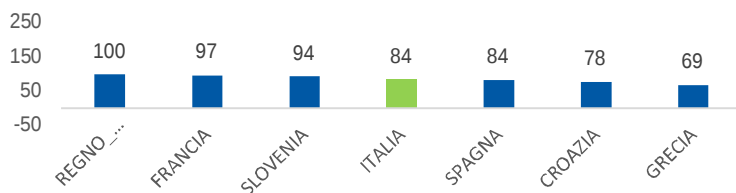
Average price on weekend of 6-8 May,
booked on 2 May - B&B room for two
Product: MOUNTAINS



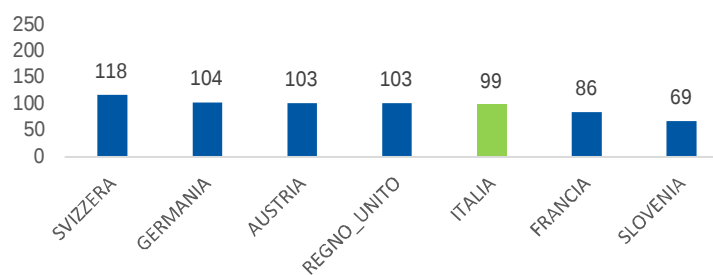
Average price on weekend of 6-8 May,
booked on 2 May - B&B room for two
Product: SPA



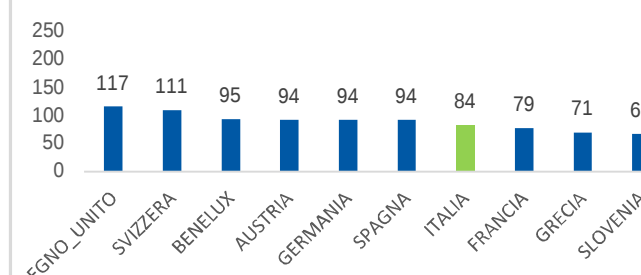
Average price on weekend of 6-8 May,
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Product: BEACH



Average price on weekend of 6-8 May,
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Product: LAKE

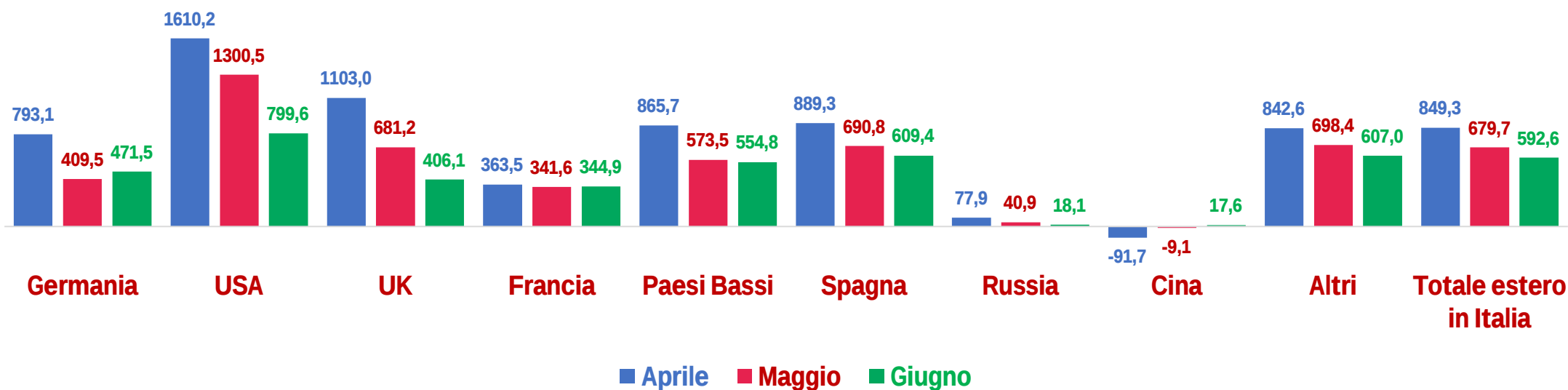


Average price on weekend of 6-8 May,
booked on 2 May - B&B room for two
Product: FOOD AND WINE



INTERNATIONAL FLIGHT BOOKINGS SPRING 2022

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

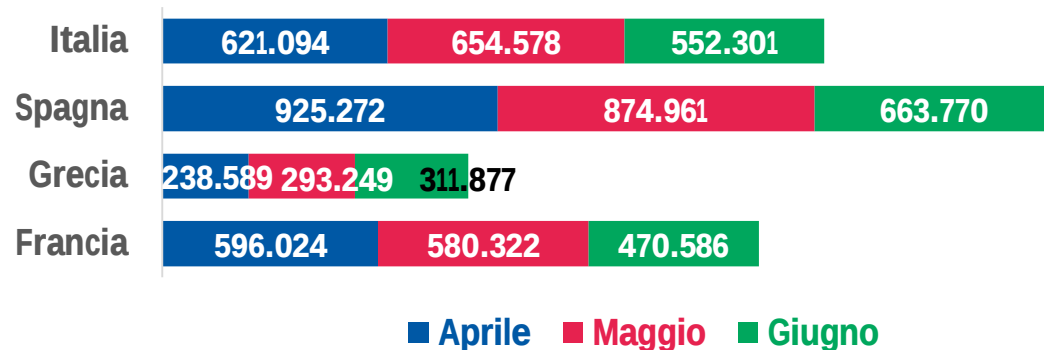


The flow of bookings for April was up on 2021 (+849.3%) for flights from all markets except for long-haul flights from China (-91.7%). There was a sharp increase in bookings for flights from the USA (+1610.2%), with the next biggest increase coming from the United Kingdom (+1103.0%). Overall, bookings for flights from other countries to Italy are currently up by +679.7% in May and +592.6% in June. In May, the United States lead the way again (+1300.5%). At present, bookings from China for June are up (+17.6%).

Source: ENIT Research Department using Forward Data – updated on 24/04/2022

INTERNATIONAL FLIGHT BOOKINGS SPRING 2022

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



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

Destination	April	May	June
Italy	849.3%	679.7%	592.6%
Spain	389.2%	276.9%	317.4%
Greece	605.7%	319.2%	214.9%
France	782.8%	683.4%	546.4%

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