

ENIT BULLETIN

In-depth analysis of trends in tourism
June 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	
1	Southern Europe	100	Spain	100	London	100
2	Western Europe	56	USA	92	Paris	78
3	Western Asia	45	Italy	75	Dubai	68
4	North America	40	United Kingdom	68	New York	48
5	Northern Europe	39	France	63	Barcelona	45
6	South East Asia	27	Turkey	51	Amsterdam	45
7	South Asia	21	Greece	42	Lisbon	44
8	Central America	15	UAE	39	Istanbul	41
9	North Africa	15	Germany	39	Rome	38
10	Caribbean	14	Portugal	36	Denpasar	33

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

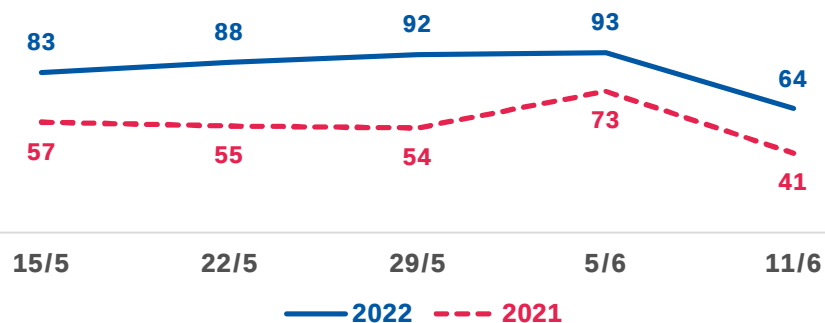
75%

Greece

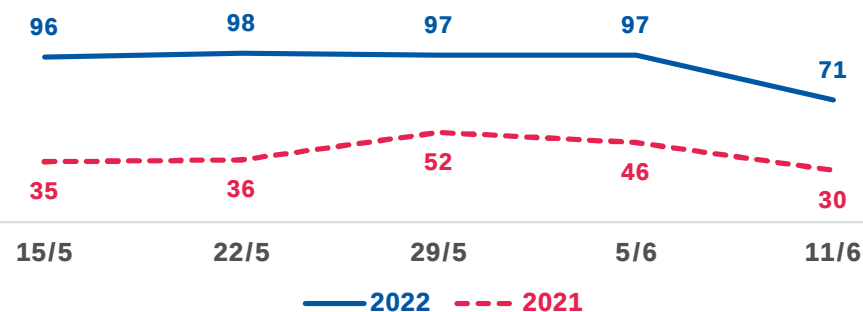
Source: ENIT Research Department using Google Destination Insights (for the period from 15/05/22 to 16/06/22, as recorded on 22/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

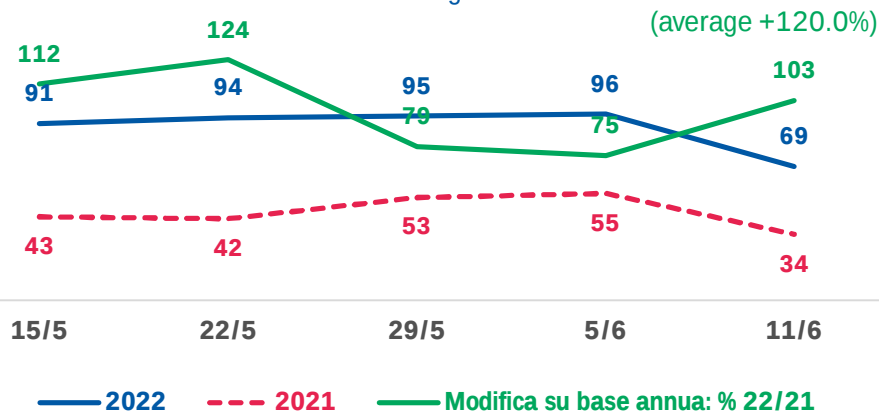
Search interest in travel to Italy
Accommodation 2022/2021



Search interest in travel to Italy
Flight 2022/2021



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



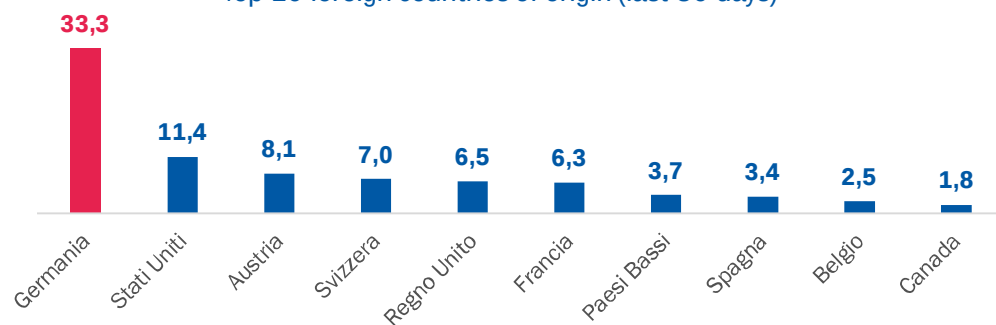
For the period analysed, the search data for travel to Italy shows that interest peaked on 5 June.

Comparison with the same dates from 2021 shows that the greatest variation (in %) was on 22 May (+124%).

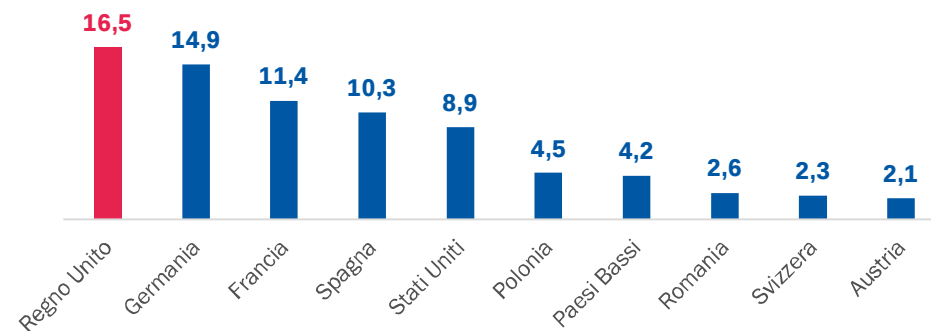
Source: ENIT Research Department using Google Destination Insights (for the period from 15/05/22 to 16/06/22, as recorded on 22/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

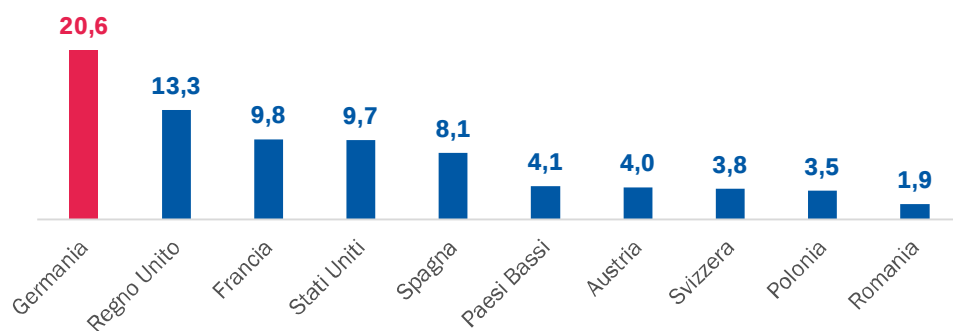
% interest in incoming travel - Accommodation
Top 10 foreign countries of origin (last 30 days)



% 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)

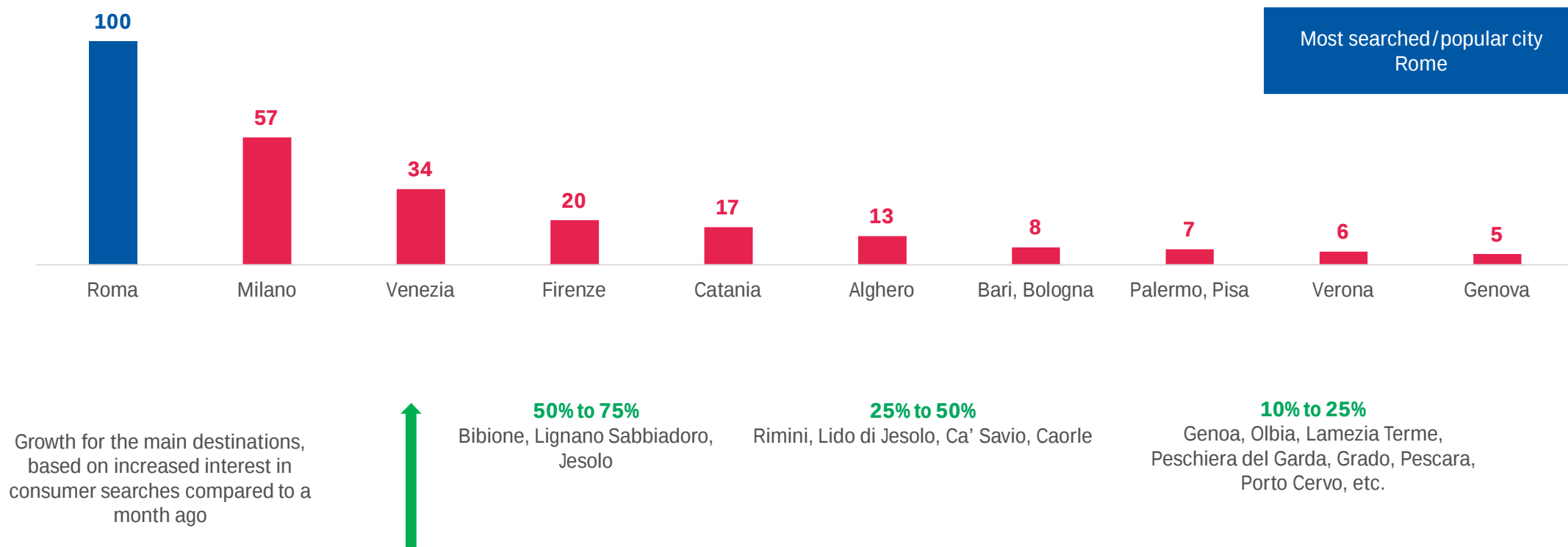


Country with greatest
interest in incoming
travel: Germany

Source: ENIT Research Department using Google Destination Insights (for the period from 15/05/22 to 16/06/22, as recorded on 22/06/22) – All data is indexed

Searches on Google in other countries for travel to Italy

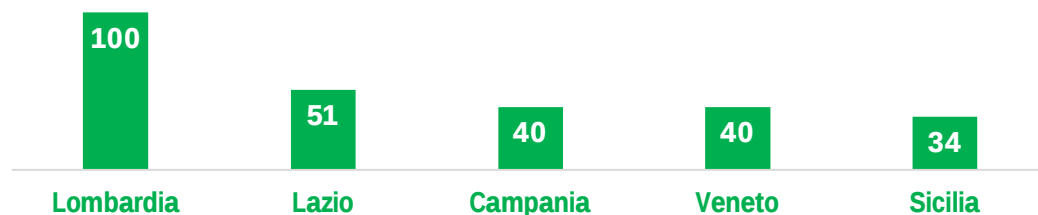
Volume of interest
Main destination cities: Flight + accommodation



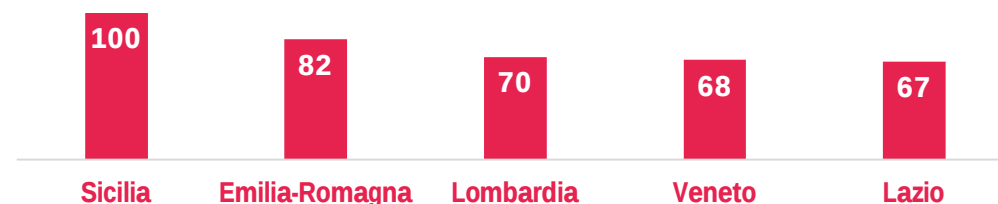
Source: ENIT Research Department using Google Destination Insights (for the period from 15/05/22 to 16/06/22, as recorded on 22/06/22) – All data is indexed

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, Jesolo	Rimini, Riccione, Cervia, Cesenatico, Cattolica, Lignano Sabbiadoro, Forio, San Benedetto del Tronto, Senigallia, Torre San Giovanni, Castiglione della Pescaia	Olbia, Alghero, Lamezia Terme, Pantelleria, Ischia, Ancona, Syracuse
Igea Marina, Vieste, Caorle, Bibione, Chioggia		

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



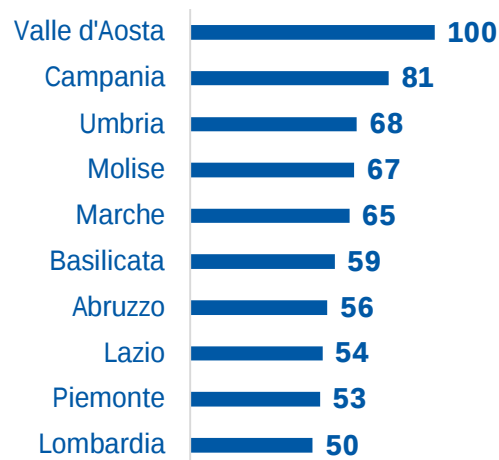
% interest in outgoing travel – Flight + accommodation
Top 5 foreign destination countries (last 30 days)



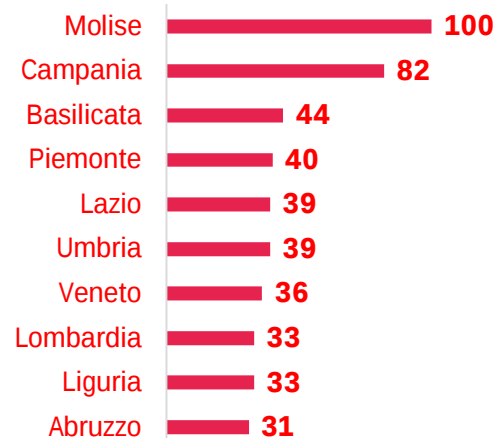
Source: ENIT Research Department using Google Destination Insights (for the period from 15/05/22 to 16/06/22, as recorded on 22/06/22) – All data is indexed

Google searches for Italy – Holidays

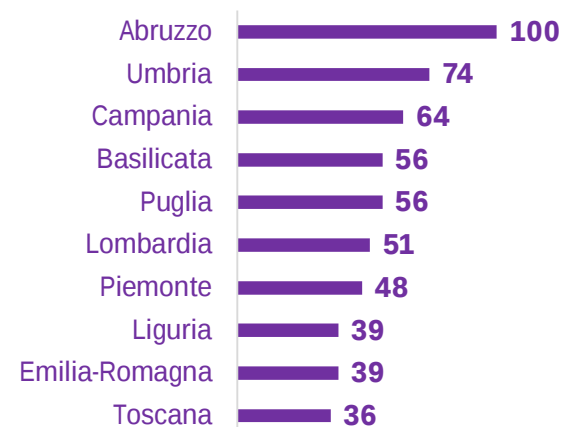
Holiday searches
Travel category: interest by region



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: Trenitalia upsurge; passport +500%; family +160%; last-minute trips +100%
Place/municipality/region/city: Campania +200%; Porto Cesareo +120%; Agropoli +120%; Amalfi Coast +80%
Month: July +190%; October +140%; August +40%
In other countries: Azores upsurge; Fuerteventura +350%; Lanzarote +100%

Most searched

Subject: holiday, home, flight, travel, cost, summer
Accommodation facility: holiday home
Place/region/municipality: Cilento, Amalfi Coast
Month: August, July, October
In other countries: Maldives, Canary Islands, Tenerife

Source: ENIT Research Department using Google Trends data on 22/06/2022 – Last 30 days

Accommodation bookings through OTAs Summer 2022 (compared with 2021)

% occupancy of accommodation
in OTA channels on 22/06/2022

Product	June		July		August	
	2022	2021	2022	2021	2022	2021
Total for Italy	48.2	24.0	31.6	29.4	22.0	42.2
Mountains	35.4	20.5	34.0	29.0	30.3	46.6
Art and culture	53.8	23.2	29.8	26.3	18.3	36.3
Beach	46.1	27.8	39.3	38.8	30.0	57.8
Lake	56.5	28.8	46.1	42.4	37.4	61.3
Spa	38.7	24.7	30.7	30.2	22.3	50.8
Other	36.5	18.4	19.2	20.8	17.0	34.3

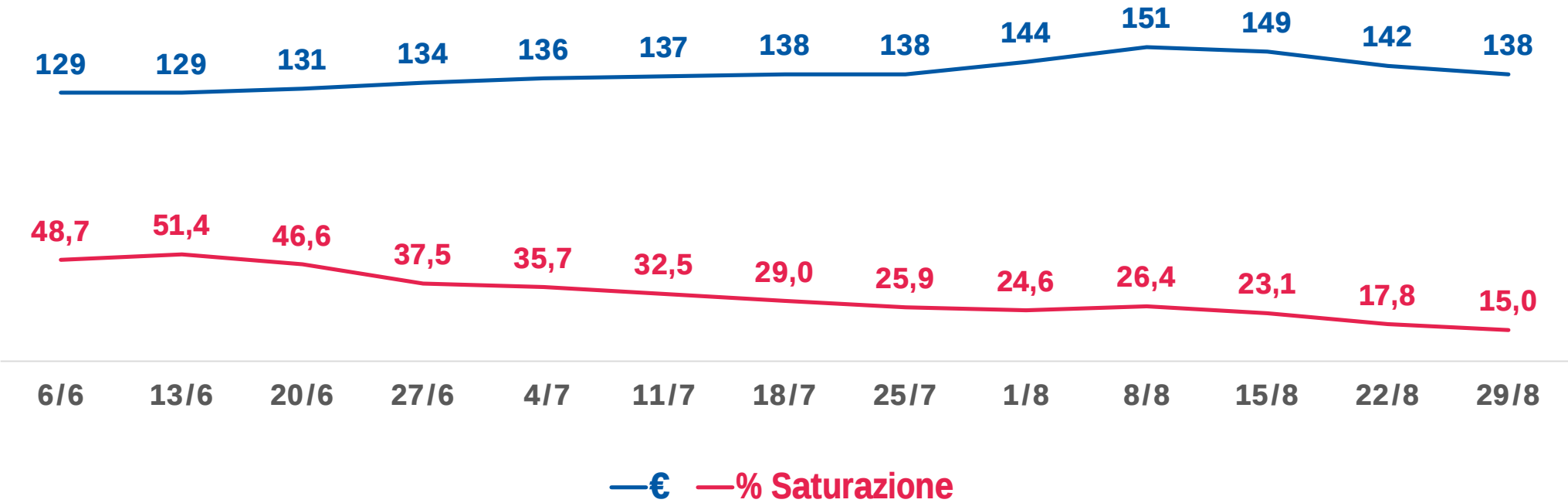
Bookings for accommodation facilities through Online Travel Agencies stand at 48.2% of the capacity for the month of June, which is approximately 24.2 percentage points more than last year. They are above the national average in the fields of lakes (56.5%) and culture (53.8%). All categories have made up ground on 2021, especially artistic and cultural towns and cities (+30.6) and lakes (+27.7)

At present, bookings cover 31.6% of the capacity for July. The highest figure and biggest increase concern lakes (46.1% and +3.7%). The figures for beach resorts (39.3%) and the mountains (34.0%) are also above the national average. The occupancy rate for the month of August stands at 22.0%. Leading the drive on this front are bookings for lakes (37.4%), the mountains (30.3%) and beach resorts (30.0%).

Accommodation bookings through OTAs

Summer 2022

Average price and % occupancy for accommodation facilities in Italy booked through OTAs, as of 22/06/2022 - Weekly data

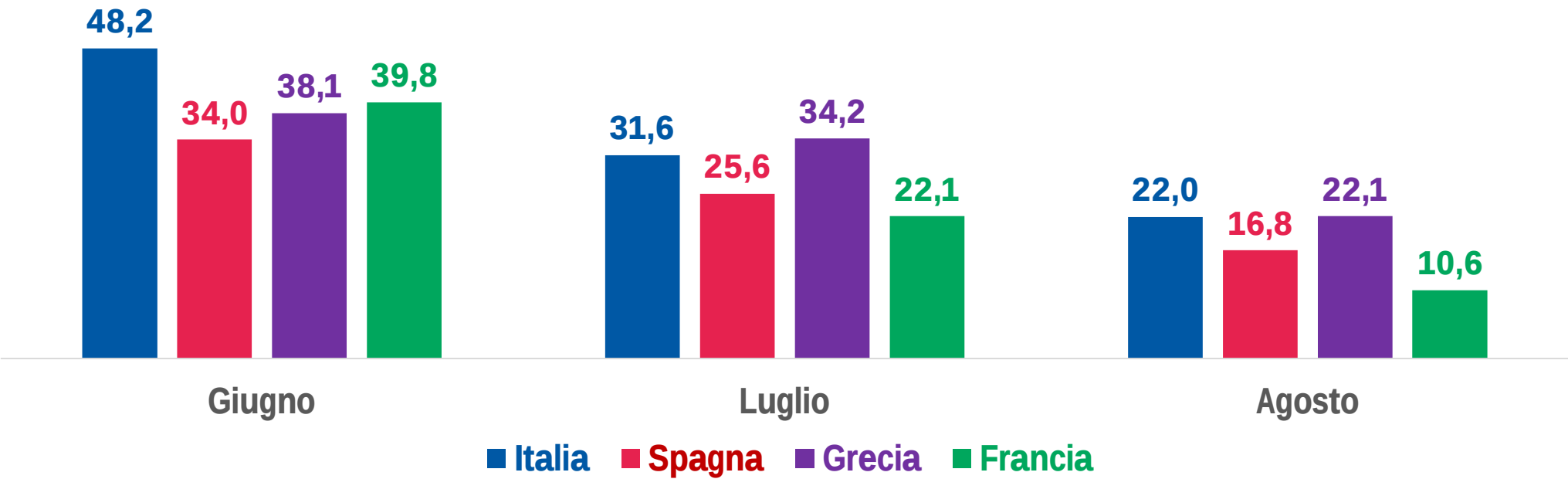


Source: ENIT Research Department using The DataAppeal Company data

Accommodation bookings through OTAs

Summer 2022

% occupancy of accommodation
in OTA channels on 22/06/2022 - Italy and competitors

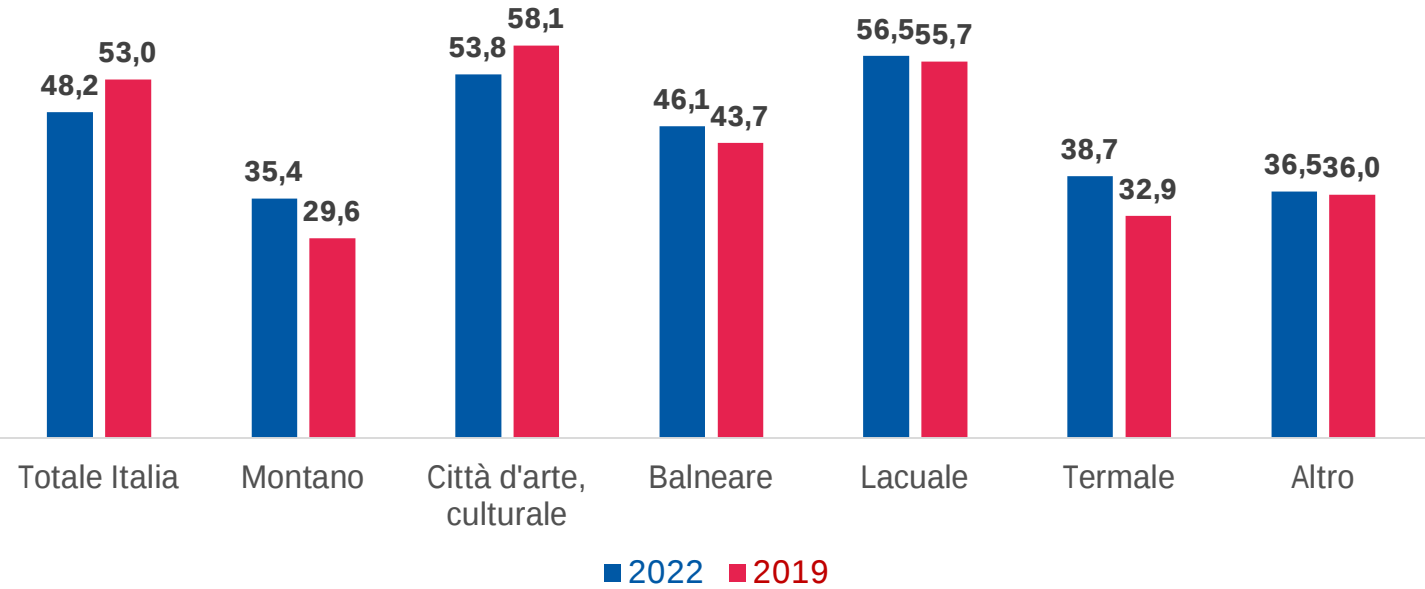


Source: ENIT Research Department using The Data Appeal Company data

Accommodation bookings through OTAs

June 2022/2019

June: % occupancy of accommodation
in OTA channels on 22/06/2022

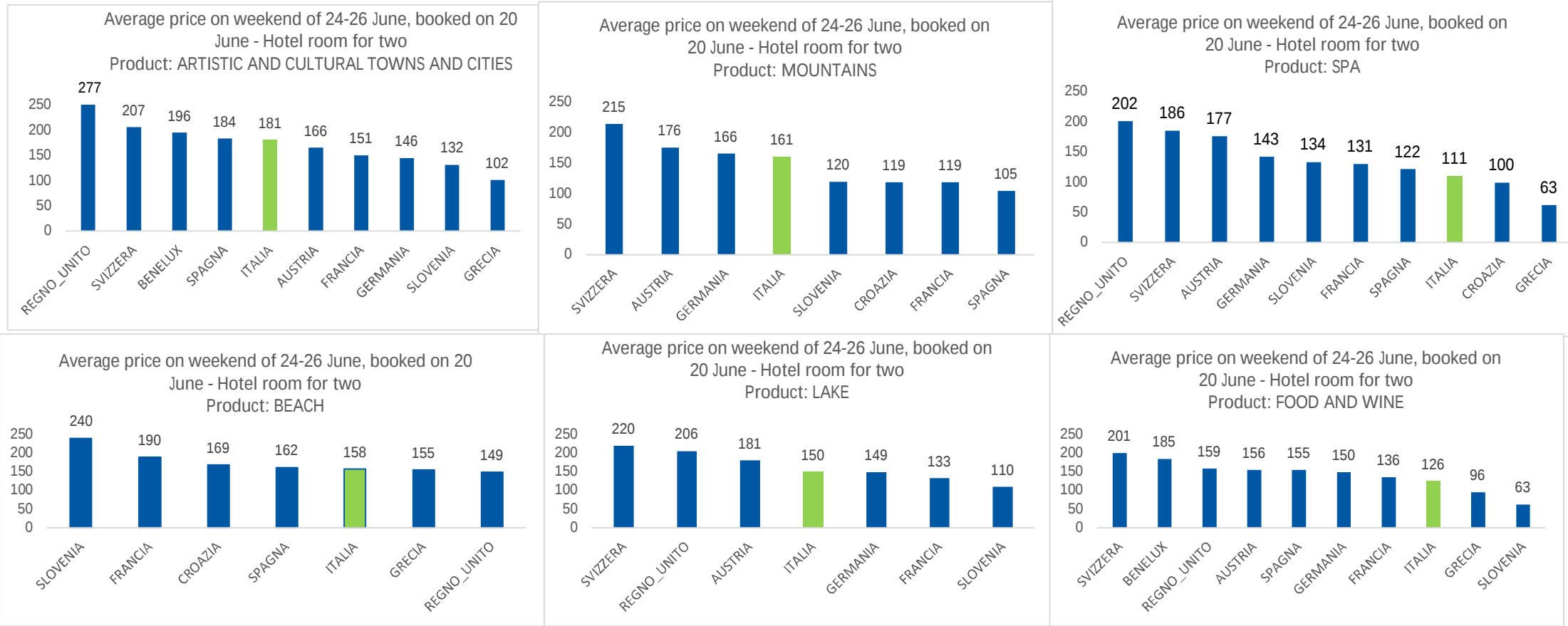


At present, overall bookings for June are down by 4.8 percentage points on 2019. Ground has been made up by bookings for the mountains, spas (+5.8) and beach resorts (+2.4).

Source: ENIT Research Department using The Data Appeal Company data

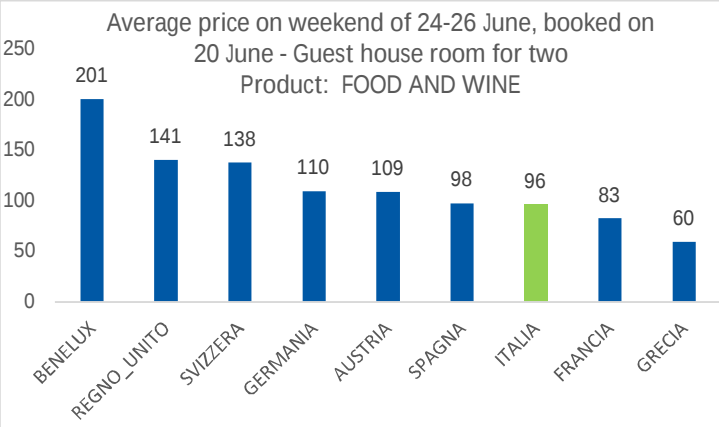
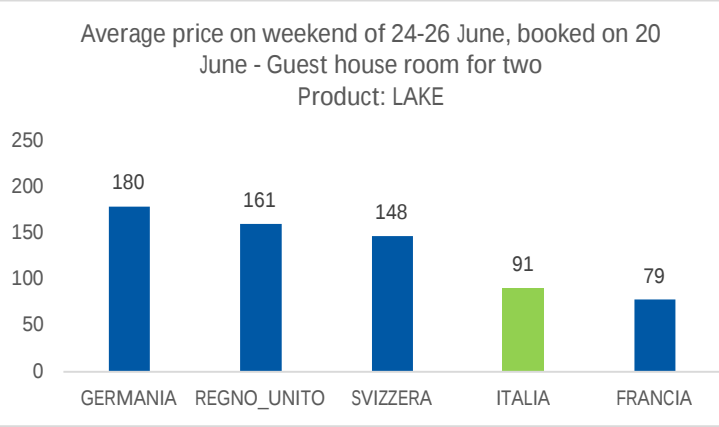
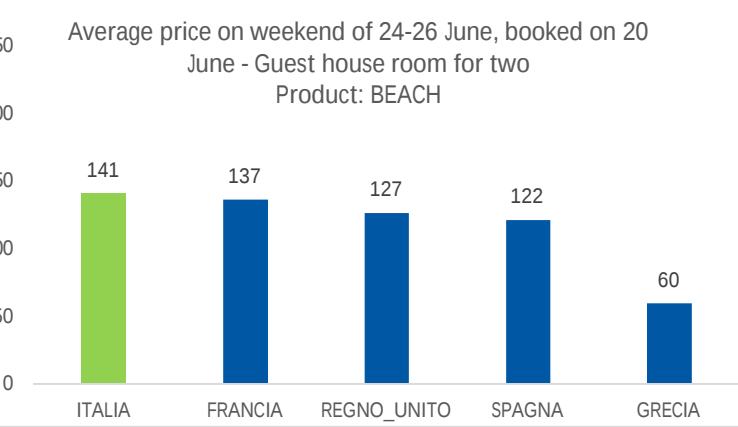
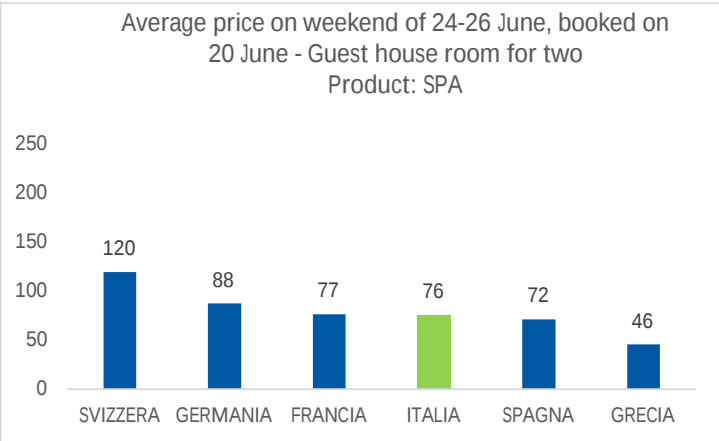
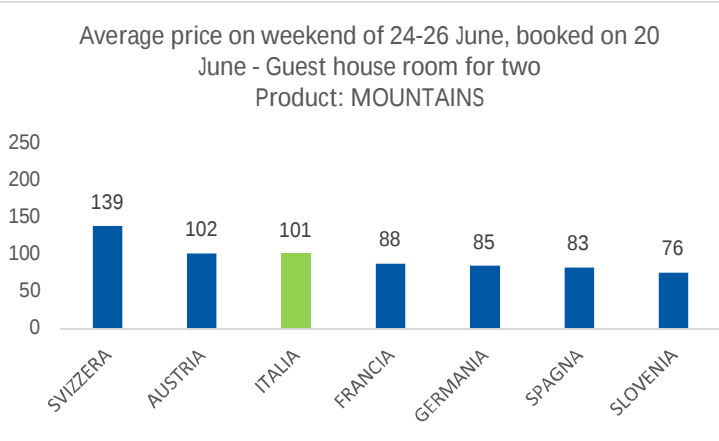
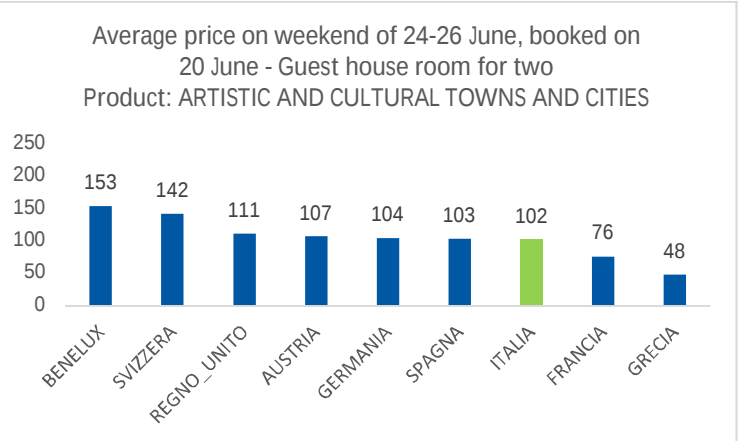
International price comparison - 4th weekend in June

HOTELS



International price comparison - 4th weekend in June

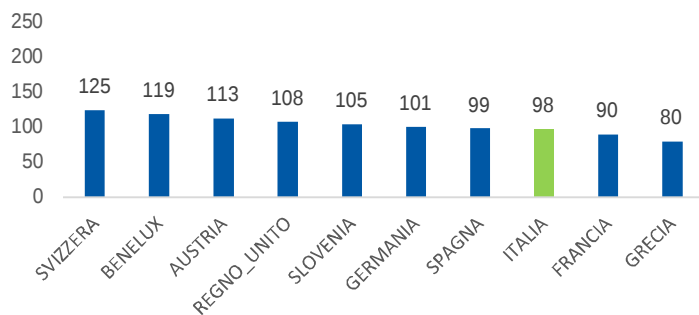
GUEST HOUSES



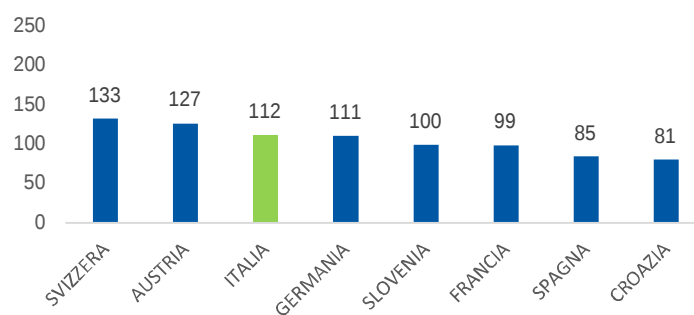
International price comparison - 4th weekend in June

B&Bs

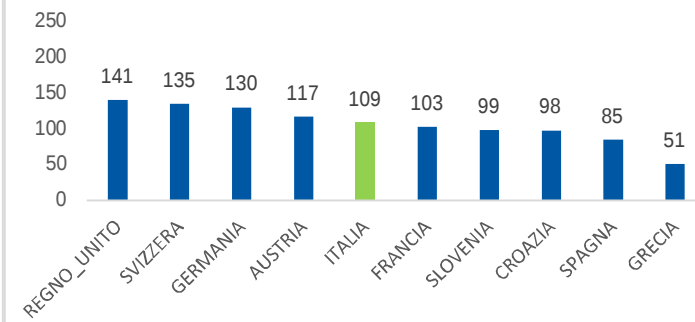
Average price on weekend of 24-26 June, booked on 20 June - B&B room for two
Product: ARTISTIC AND CULTURAL TOWNS AND CITIES



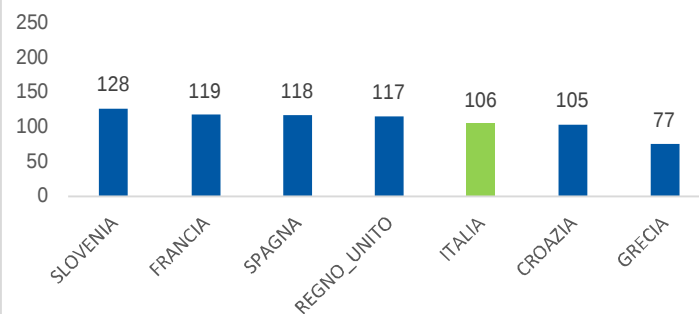
Average price on weekend of 24-26 June, booked on 20 June - B&B room for two
Product: MOUNTAINS



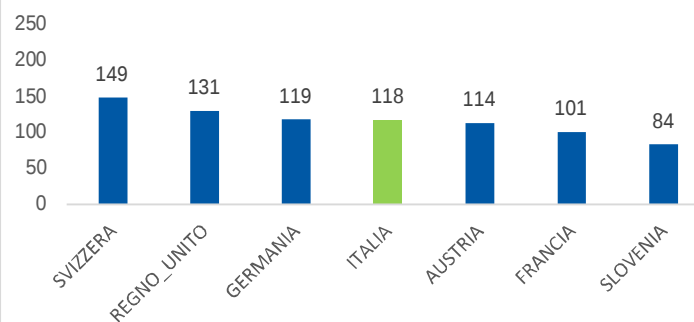
Average price on weekend of 24-26 June, booked on 20 June - B&B room for two
Product: SPA



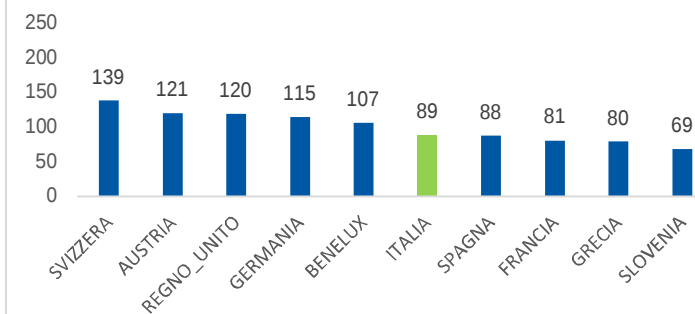
Average price on weekend of 24-26 June, booked on 20 June - B&B room for two
Product: BEACH



Average price on weekend of 24-26 June, booked on 20 June - B&B room for two
Product: LAKE



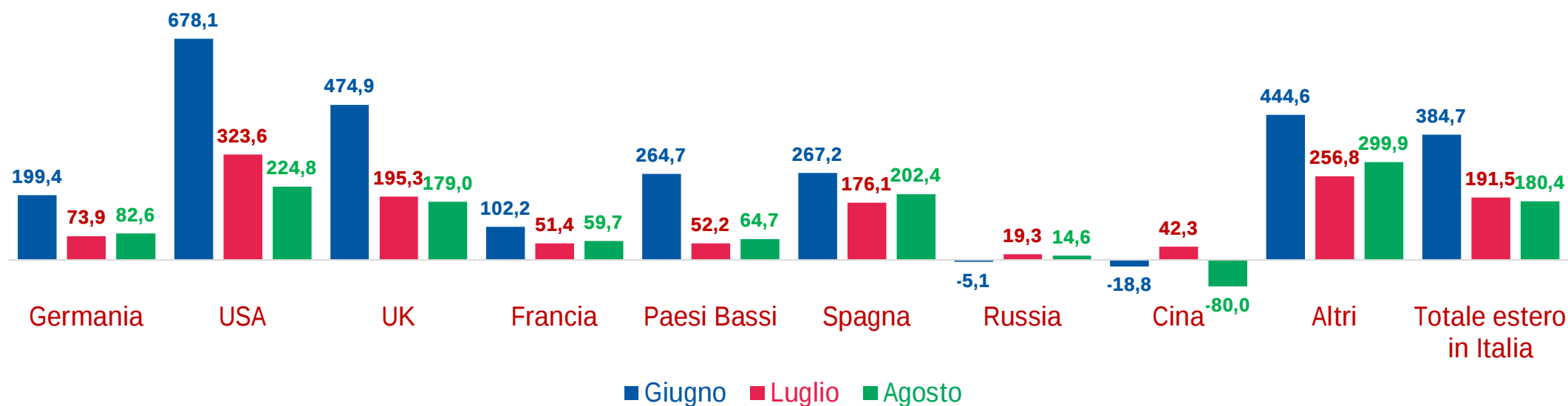
Average price on weekend of 24-26 June, booked on 20 June - B&B room for two
Product: FOOD AND WINE



Source: ENIT Research Department using Remtene data

International flight bookings - Summer 2022

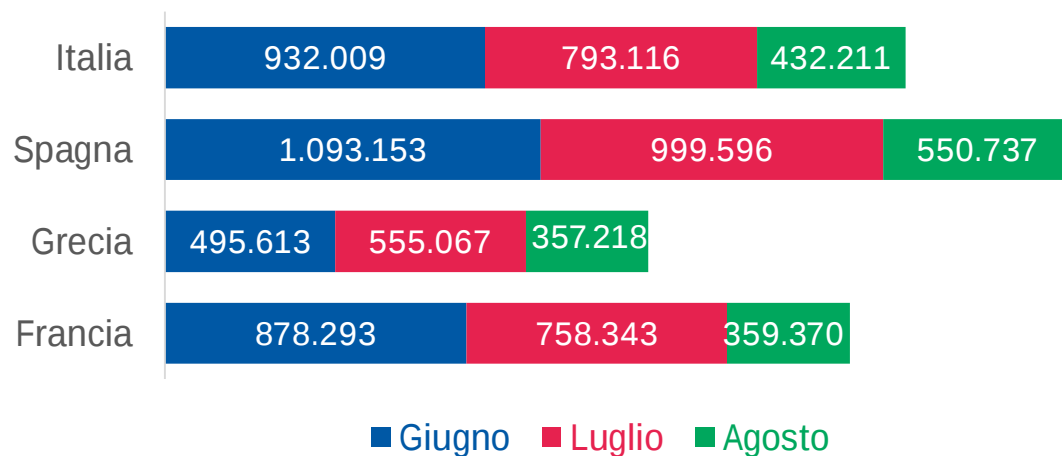
Bookings of flights to Italy by country of origin
Var. % 2022/2021 as of 22/06/2022



Overall, **bookings for flights from other countries to Italy are currently up on 2021 by +384.7% in June, +191.5% in July and +180.4% in August.**

International flight bookings Summer 2022

Flight bookings on 22/06/2022
Total international flights to Italy and competitors



Total international flight bookings, Italy and competitors
Var. % 2022/2021, as of 22/06/2022

Destination	June	July	August
Italy	384.7%	191.5%	180.4%
Spain	185.0%	109.0%	103.7%
Greece	132.7%	65.7%	61.4%
France	390.9%	200.6%	234.1%

All bookings of flights to Italy are up on 2021.

Source: ENIT Research Department using Forward Data – updated on 12/06/2022

International flight bookings

Summer 2022

Total international flight bookings, Italy and competitors
Var. % June 2022/2021 and 2022/2019, as of 22/06/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	385.0%	-27.5%
Spain	185.0%	-18.1%
Greece	132.7%	-0.4%
France	390.9%	-26.1%

Total flight bookings, Italy and competitors
Var. % July 2022/2021 and 2022/2019, as of 22/06/2022

Destination	Var. % 22/21	Var. % 22/19
Italy	191.5%	-16.9%
Spain	109.0%	-7.7%
Greece	65.7%	14.3%
France	200.6%	-10.8%

Source: ENIT Research Department using Forward Data – updated on 12/06/2022