Tourism demand in Italy

Winter Survey 2021/2022
End-of-season survey

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Introduction

Objectives

TO OBTAIN INFORMATION AND INSIGHTS REGARDING ALL ASPECTS OF TOURISM DEMAND IN ITALY, LOOKING INTO THE EXPERIENCE AND SENTIMENT OF ITALIANS, IN TWO SENSES:

➢ GENERAL - INTENTION TO TRAVEL, HOLIDAY DESIRES, MOTIVATION, PREFERENCES, INFORMATION CHANNELS

➢ CONTEXTUAL - FORECASTS AND ACTUAL DATA FOR THE EASTER, SUMMER AND CHRISTMAS PERIODS

Target

POPULATION RESIDENT IN ITALY, 18+

REPRESENTATIVE SAMPLE STRATIFIED BY AGE, GENDER, REGION AND DEGREE OF URBANISATION

Questionnaire

SEMI-STRUCTURED

AVERAGE DURATION 15 MINUTES

Methodology

3500 CATI INTERVIEWS

Fieldwork

3 – 14 MARCH 2021

Time Schedule

Easter		Summer		Winter	
Forecast	Actual	Forecast	Actual	Forecast	Actual

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Sample profile

Total interviews `3500`

STRUCTURAL VARIABLES OF THE SAMPLE

%		Age						
		18-24	25-34	35-44	45-54	55-64	65-74	75+
Sex	Male	8.9	13.5	16.2	19.7	16.8	13.3	11.6
	Female	7.6	12.1	14.9	18.7	16.7	13.9	16.1

%		Regions									
		Abruzzo	Basilicata	Calabria	Campania	Emilia-Romagna	Friuli-Venezia Giulia	Lazio	Liguria	Lombardy	Marche
Level of urbanisation	High	0.3	0.2	0.5	5.4	2.9	0.6	5.0	1.2	7.2	0.3
	Medium	1.2	0.3	1.5	3.0	3.1	0.9	3.7	1.1	7.9	1.6
	Low	0.7	0.5	1.1	1.2	1.5	0.5	1.0	0.3	1.8	0.6
		Regions									
		Molise	Piedmont	Puglia	Sardinia	Sicily	Tuscany	Trentino-Alto Adige	Umbria	Valle d'Aosta	Veneto
	High	0.1	1.9	2.3	0.5	2.7	1.8	0.4	0.5	0.0	1.4
	Medium	0.1	3.5	4.0	1.3	4.7	3.2	0.6	0.6	0.1	5.1
	Low	0.3	1.8	0.3	0.9	0.9	1.2	0.8	0.4	0.1	1.4

Sample profile

Total interviews `3500`

STUDY DOMAINS

Generation (year of birth)	%
Gen Z (after 1995)	9.9
Millennials (1981 - 1995)	20.3
Gen X (1966 - 1980)	28.3
Baby Boomers (1946 - 1965)	30.6
Veterans (before 1946)	10.9
Total	100.0

Level of education	%
Primary	5.3
Lower secondary	20.8
Upper secondary	54.7
Degree or higher	19.2
Total	100.0

Professional condition	%
Executive/entrepreneur	1.6
Middle management	1.8
White collar	32.7
Blue collar	9.4
Freelance professional	4.0
Self-employed	3.5
Student	5.5
Home-maker	11.8
Retired	24.6
Unemployed	4.5
Other	0.6
Total	100.0

Family composition	%
1	10.3
2	37.0
3	25.4
4+	27.3
Total	100.0

Economic status*	%
Low	51.1
Medium	33.5
High	15.4
Total	100.0

Type of traveller*	%
Non-traveller	23.5
Occasional	54.9
Frequent	21.6
Total	100.0

*THE CRITERIA USED FOR THE CONSTRUCTION OF THESE TWO VARIABLES ARE SPECIFIED IN A METHODOLOGY NOTE AT THE END OF THIS DOCUMENT

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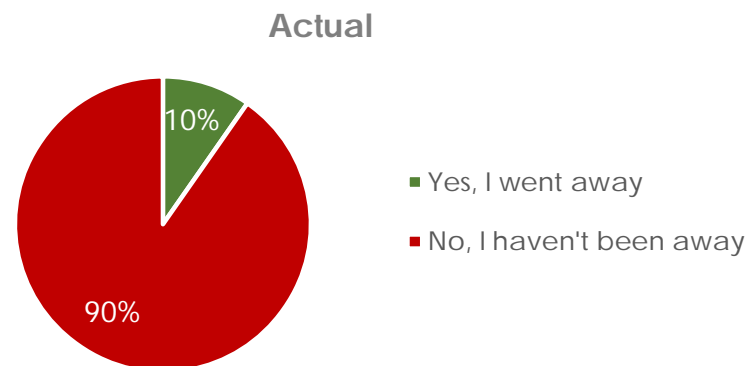# Winter season: Holidaymakers

In the end (almost all) undecided Italians chose not to go away

Do you plan to go / did you go on holiday this winter? Consider both day trips (no overnight stay)
and holidays with overnight stays (%)

Intention

- Yes, I intend to go away
- No, I don't intend to go away
- I don't know, I haven't decided

7%
22%
71%

Base: Total Sample (3500 interviews)

Actual

- Yes, I went away
- No, I haven't been away

10%
90%
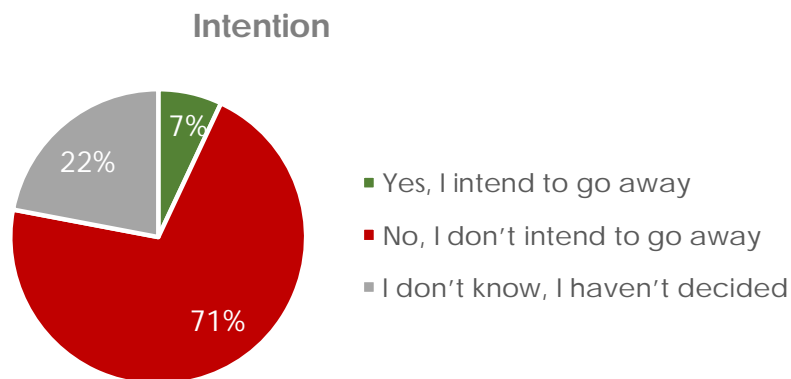
Base: Total Sample (3500 interviews)

Holidaymaker identikit

(Winter season - Actual, % on total sample)

Total Sample	10%

Geographical Area	
North-West	**12%**
North-East	**11%**
Centre	**10%**
South	6%
Islands	8%

Generation	
Gen Z	11%
Millennials	12%
Gen X	**14%**
Baby Boomers	7%
Veterans	2%

Traveller classification	
Non-traveller	2%
Occasional	7%
Frequent	**24%**

Economic status	
Low	6%
Medium	12%
High	**16%**

Base: Total Sample (3500 interviews)

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Winter season: Holidaymakers

Burdened by economic difficulties, commitments and (continuing) fear of Covid

What is the main reason you have not planned to go / have not gone on holiday in this period? (%)

Intention
Base: Respondents who do not intend to go on holiday / has not yet decided (3264 interviews)

Actual
Base: Respondents who have not gone on holiday (3161 interviews)

	Intention	Actual
Restrizioni dovute al Coronavirus	9%	7%
Motivi di famiglia	8%	8%
Motivi di salute	6%	8%
Paura di contrarre il Coronavirus	14%	15%
Motivi di lavoro e studio	14%	17%
Non ho l'abitudine di partire in questo periodo	20%	20%
Motivi economici	21%	21%

Generation	
Gen Z	21%
Millennials	24%
Gen X	**26%**
Baby Boomers	20%
Veterans	12%

Traveller classification	
Non-traveller	**29%**
Occasional	20%
Frequent	16%

Economic status	
Low	**29%**
Medium	15%
High	8%

Winter season: Destination

Dreams of a holiday abroad mostly shattered

Do you intend to go / did you go on holiday in Italy or abroad? (%)

Intention
Base: Respondents who intend to go on holiday (236 interviews)

Destination	
Italy	79%
Abroad	21%
Total	100%

Actual
Base: Respondents who went on holiday (339 interviews)

Destination	
Italy	90%
Abroad	10%
Total	100%

When (month/s)	
December	50%
January	38%
February	24%

Experiments can wait

Is it the first time you've been to this destination? (%)

Intention
Base: Respondents who intend to go on holiday (236 interviews)

31%	39%	31%

Actual
Base: Respondents who went on holiday (339 interviews)

28%	50%	22%
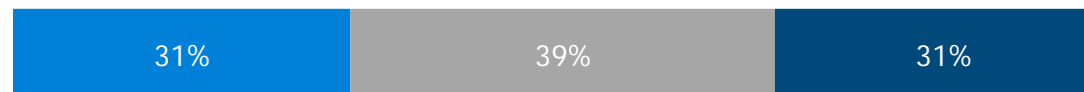
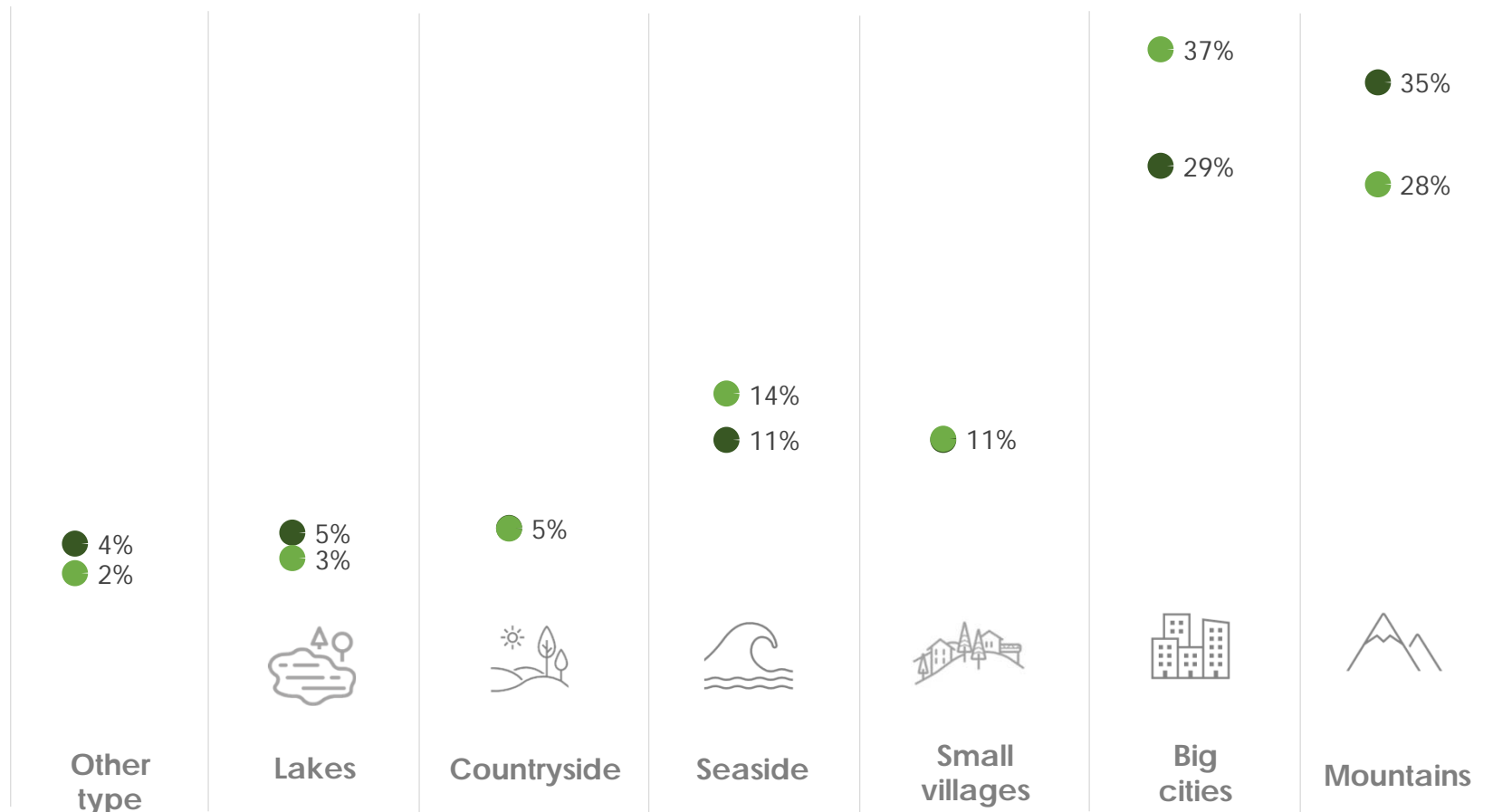■ Yes   ■ No, I've been there before   ■ No, I go there regularly

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Winter season: Destination

The call of the mountains prevailed in the end

Where do you intend to go / did you go? (%)

Intention
Base: Respondents who intend to go on holiday (236 interviews)

Actual
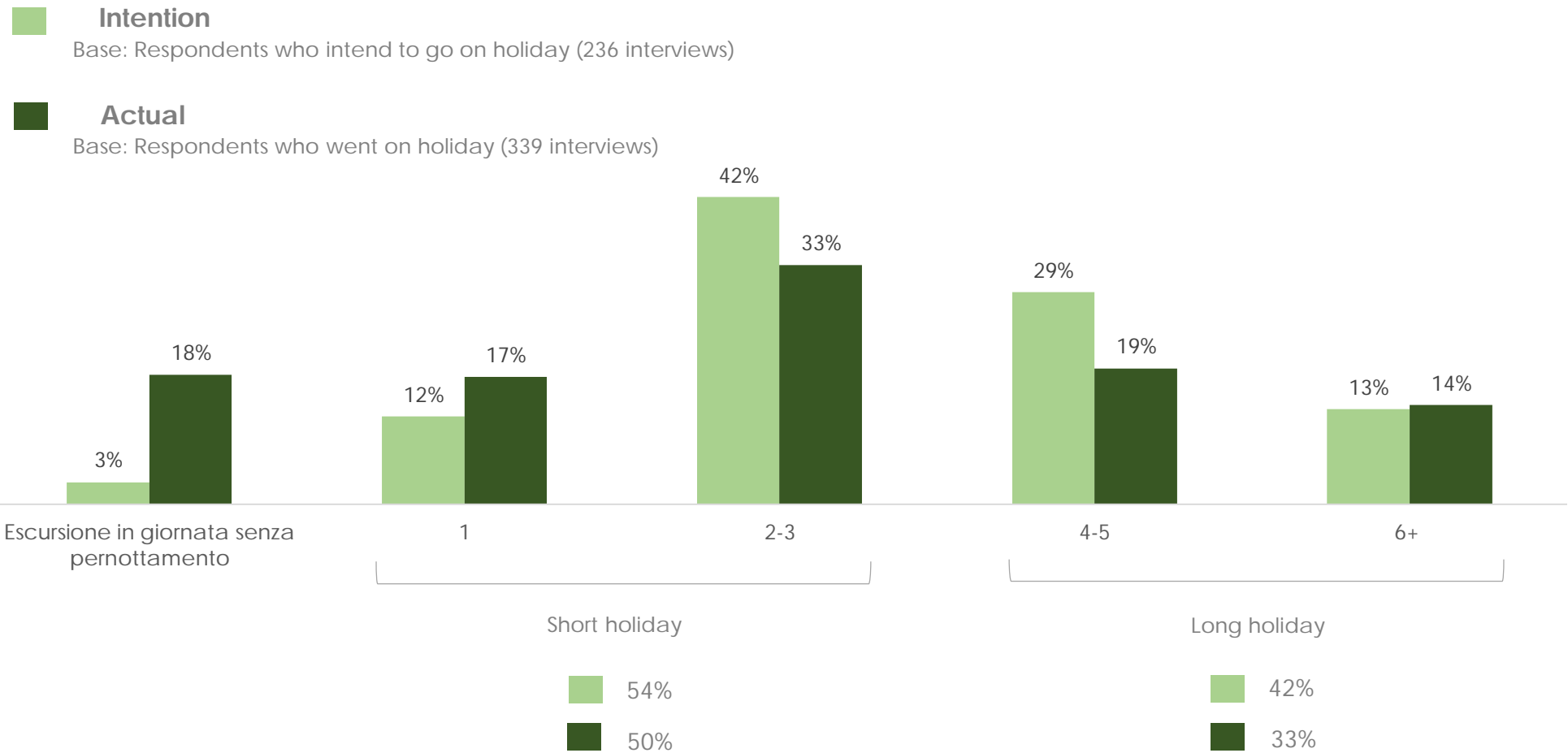Base: Respondents who went on holiday (339 interviews)

Other type	Lakes	Countryside	Seaside	Small villages	Big cities	Mountains
4% (Actual) / 2% (Intention)	5% (Actual) / 3% (Intention)	5% (Intention)	14% (Intention) / 11% (Actual)	11% (Intention)	37% (Intention) / 29% (Actual)	35% (Actual) / 28% (Intention)

Winter season: Travel

One in five holidaymakers did not stay overnight
How long will/did your holiday last, considering the number of nights away? (%)

Intention
Base: Respondents who intend to go on holiday (236 interviews)

Actual
Base: Respondents who went on holiday (339 interviews)

	Escursione in giornata senza pernottamento	1	2-3	4-5	6+
Intention	3%	12%	42%	29%	13%
Actual	18%	17%	33%	19%	14%

Short holiday

Long holiday

Short holiday: 54% / 50%

Long holiday: 42% / 33%

Winter season: Travel

Rise in "comfort" solutions …

In what type of accommodation will you / did you stay? (%)

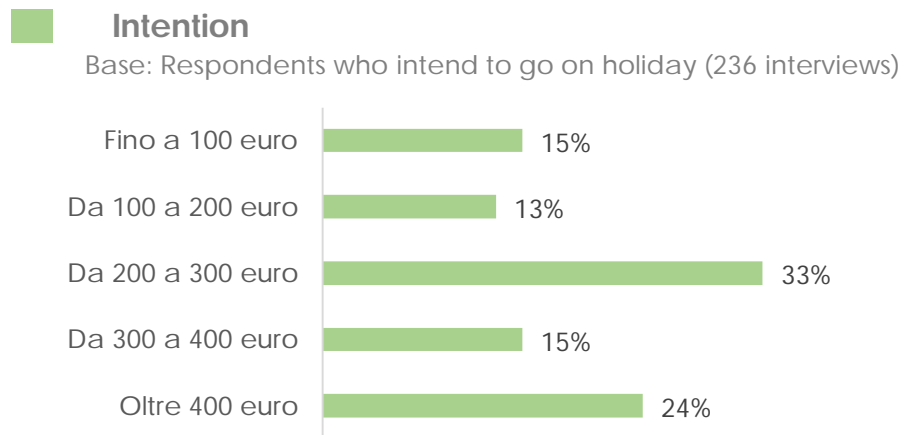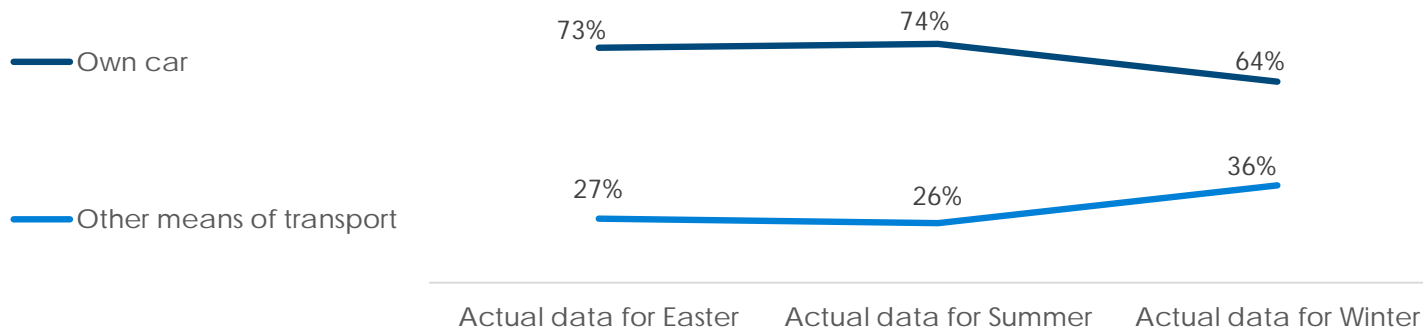|	Intention	Actual	
	Base: Respondents who intend to go on holiday with overnight stay/s (229 interviews)	Base: Respondents who went on holiday with overnight stay (279 interviews)	
Hotel/Motel/Boarding house	37%	43%	+6%
House/room free of charge staying with friends/relatives	17%	18%	+1%
Own property or timeshare	10%	13%	+3%
Bed & Breakfast	9%	6%	-3%
Rented property	7%	5%	-2%
Campsite	4%	4%	=
Holiday village	3%	3%	=
Farm holiday accommodation	3%	1%	-2%

Winter season: Travel

.. but with average spending inferior to expectations

How much do you expect to / did you spend (travel, overnight stay/s, …) per person for this holiday?(%)

Intention
Base: Respondents who intend to go on holiday (236 interviews)

Fino a 100 euro	15%
Da 100 a 200 euro	13%
Da 200 a 300 euro	33%
Da 300 a 400 euro	15%
Oltre 400 euro	24%

Actual
Base: Respondents who went on holiday (339 interviews)

Fino a 100 euro	26%
Da 100 a 200 euro	30%
Da 200 a 300 euro	17%
Da 300 a 400 euro	12%
Oltre 400 euro	16%

Upturn in the use of transport other than cars

Which means of transport do you intend to /did you use (if more than one, indicate the main one, i.e. The one used to travel the longest distance)? (%)

	Actual data for Easter	Actual data for Summer	Actual data for Winter
Own car	73%	74%	64%
Other means of transport	27%	26%	36%

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Introduction

Sample profile

Winter season

    Holidaymakers

    Destination

    Travel

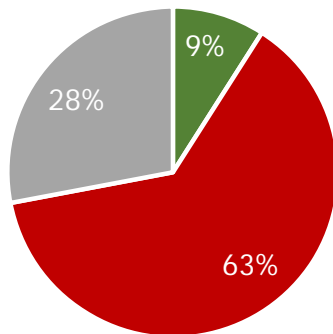**Forecasts for the Easter period**

Wellness on holiday

Forecasts for the Easter period

Uncertainty remains high
Do you intend to go on holiday in April/May? Consider both day trips (no overnight stay)
and holidays with overnight stays? (%)

- Yes, I intend to go away
- No, I don't intend to go away
- I don't know, I haven't decided

Base: Total Sample (3500 interviews)

Type of travellers	on holiday			
	Yes	No	Don't know	Total
Non-traveller	1%	82%	17%	100%
Occasional	7%	63%	30%	100%
Frequent	**25%**	43%	32%	100%
Total	9%	63%	28%	100%

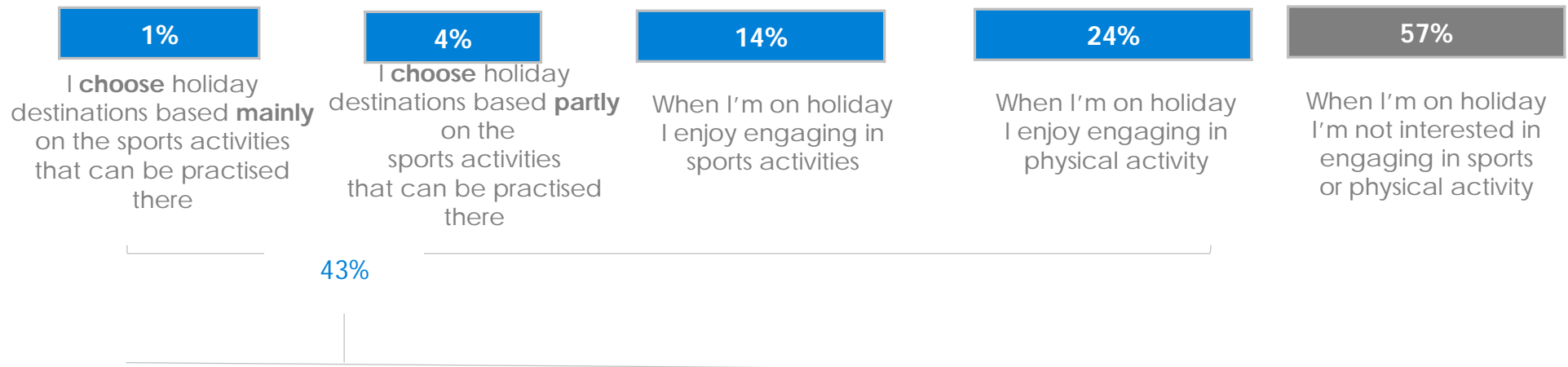| Economic status	on holiday			
	Yes	No	Don't know	Total
Low	6%	69%	25%	100%
Medium	11%	60%	29%	100%
High	**16%**	50%	34%	100%
Total	9%	63%	28%	100%

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Wellness on holiday: sport and physical activity

Sport and physical activity are holiday drivers for almost one in two Italians

Talking now about holidays and movement, which of the following sentences best describes your preferences? (%)

1%	4%	14%	24%	57%
I **choose** holiday destinations based **mainly** on the sports activities that can be practised there	I **choose** holiday destinations based **partly** on the sports activities that can be practised there	When I'm on holiday I enjoy engaging in sports activities	When I'm on holiday I enjoy engaging in physical activity	When I'm on holiday I'm not interested in engaging in sports or physical activity

43%

Gender	
Male	**47%**
Female	40%

Generation	
Gen Z	47%
Millennials	**54%**
Gen X	49%
Baby Boomers	38%
Veterans	21%

Do you engage in sports activities?	
Yes, every day	75%
Yes, more than once a week	**78%**
Yes, once a week	74%
Yes, less frequently	63%
Never	25%

Base: Total Sample (3500 interviews)

Wellness on holiday: sport and physical activity

Nature is more important than fun

What is the main thing you associate with movement on holiday? (%)
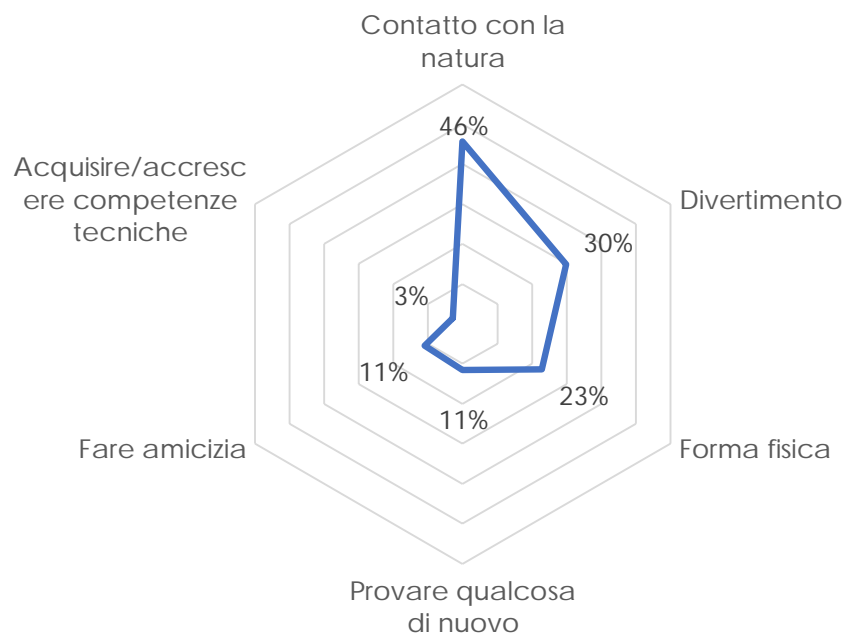
	Gen Z	Millennials	Gen X	Baby Boomers	Veterans
Contact with nature	**29%**	**36%**	**41%**	**54%**	**69%**
Fun	38%	38%	31%	24%	20%
Fitness	26%	25%	24%	22%	17%
Trying something new	15%	17%	13%	8%	7%
Making friends	16%	12%	11%	9%	12%

Base: Total Sample (3500 interviews)

Wellness on holiday: other wellness-related activities

Wellness-related activities are also a holiday driver for almost one in two Italians

Talking about holidays and wellness, which of the following sentences best describes your preferences? (%)

3%	9%	40%	48%
I **choose** holiday destinations based **mainly** on the wellness-related activities that can be engaged in there	I **choose** holiday destinations based **partly** on the wellness-related activities that can be engaged in there	When I'm on holiday I **enjoy** engaging in wellness-related activities	When I'm on holiday I'm not interested in spending time on wellness-related activities

52%

Gender	
Male	50%
Female	**53%**

Generation	
Gen Z	52%
Millennials	**64%**
Gen X	60%
Baby Boomers	44%
Veterans	29%

Do you engage in wellness activities?	
Yes, every day	93%
Yes, more than once a week	**96%**
Yes, once a week	94%
Yes, less frequently	80%
Never	32%

Base: Total Sample (3500 interviews)

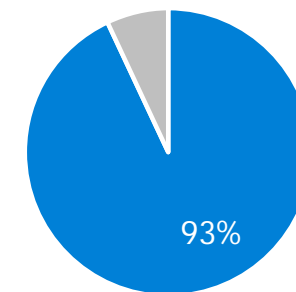# Wellness on holiday: sports activities during winter holidays

Italians and movement
Did you engage in sports activities on holiday? (%)

36%	**Did you practise at least one sport during your winter holiday?**

Base: Respondents who went on holiday this winter (339 interviews)

.5

Top 10 Sports Practised

33% Sci
10% Slittino
8% Alpinismo
8% Atletica leggera
5% Ginnastica
5% Nuoto
4% Arrampicata sportiva
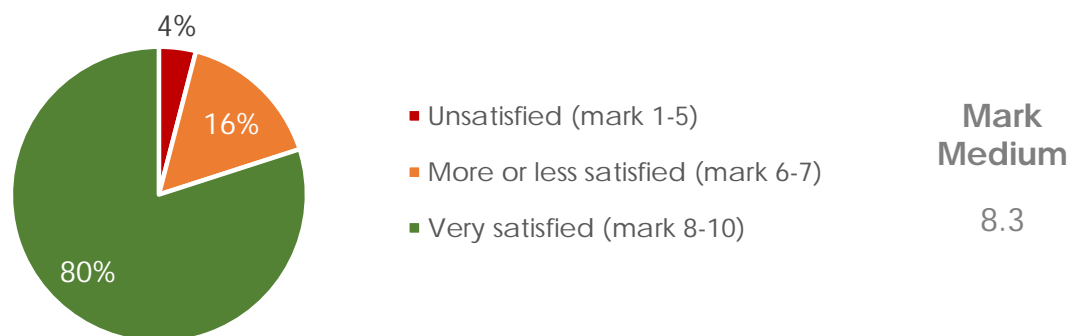3% Arti marziali
3% Attività Subacquee
3% Bob

93%
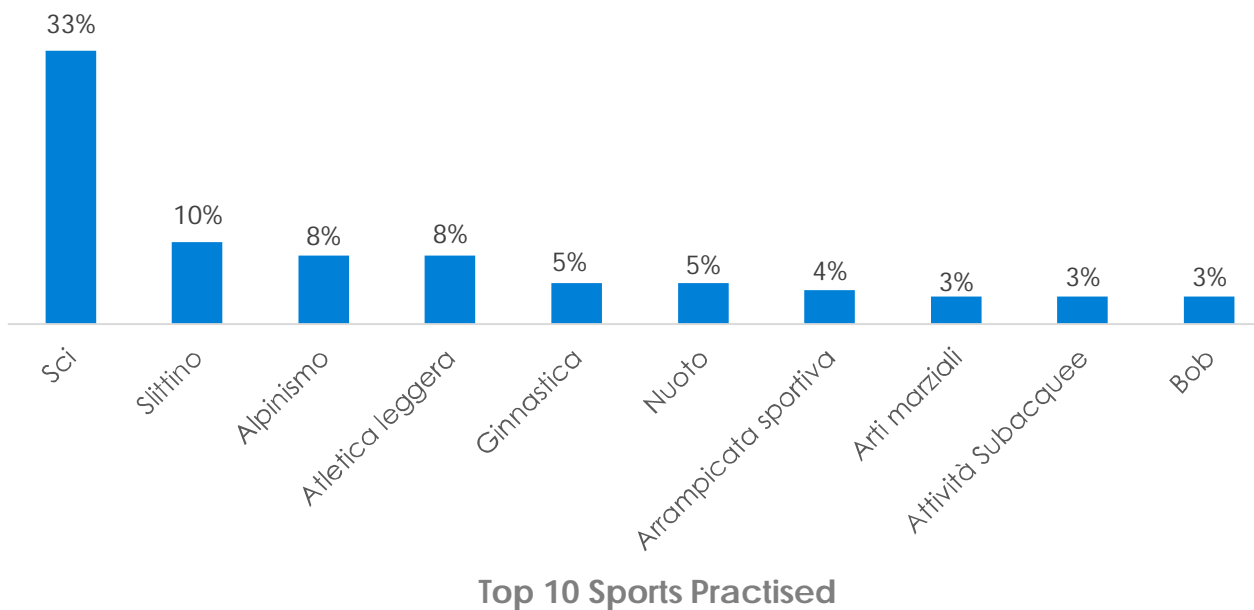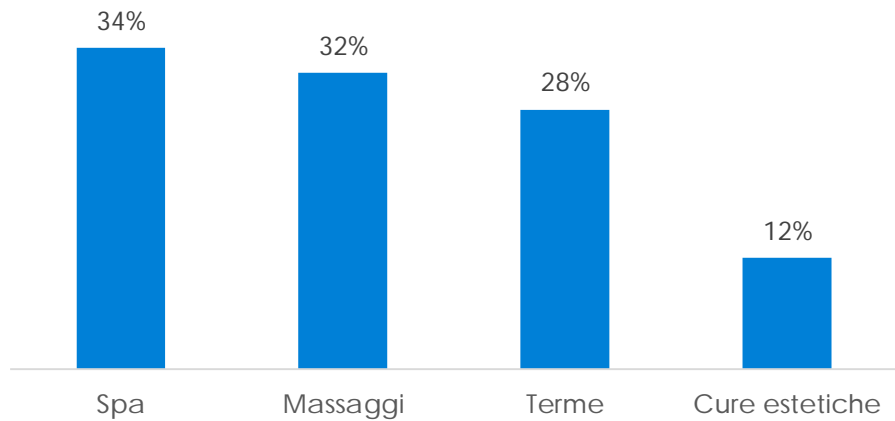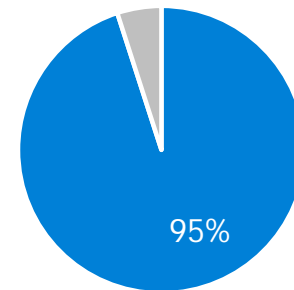
**Are you satisfied
with the sports
activity experienced
on holiday
(Yes, very + yes, fairly)**

Base: Respondents who went on holiday this winter and practised at least one sport (122 interviews)

.5   testo initaliano

Administrator; 27/01/2023

Wellness on holiday: Satisfaction

The feel-good factor of holidays
How satisfied were you with this holiday with regard to your physical and mental well-being?(%)

4%

16%

80%

- Unsatisfied (mark 1-5)
- More or less satisfied (mark 6-7)
- Very satisfied (mark 8-10)

Mark Medium

8.3

Base: Respondents who went on holiday this winter (339 interviews)

The "natural" ingredient in the recipe for happiness
Which of the following aspects contributes most to your well-being on holiday? (%)

	%
Contact with nature	37%
Experiences, seeing and discovering new things	35%
Contact with my loved ones	35%
The chance for some exercise	24%
Healthy pace of life	23%

Base: Respondents who went on holiday this winter (339 interviews)

Method used to create the profiling variables

- ECONOMIC STATUS

Economic status was inferred directly from Q. 28 and Q. 28bis (reproportioned based on family size, using the equivalence scales used for the calculation of the citizenship Guaranteed Minimum Income).

Where respondents gave no answer to Q.28 and Q. 28bis, the economic situation of the family was reconstructed using a proxy indicator that took account of the following questions:

• What is the professional condition of the head of household
• What is the main reason you have not planned to go on holiday in this period? (Economic reasons)
• How much do you expect to spend (travel, overnight stay/s, …) per person for this holiday?

- TYPE OF TRAVELLER

This variable was created by cross-referencing the questions regarding frequency of travel both in Italy and abroad (Considering your life before the pandemic, how often did you go on holiday in Italy? And abroad?) as shown in the table below:

		ABROAD	ABROAD	ABROAD	ABROAD	ABROAD
		More than 4 times a year	2-4 times a year	Once a year	Less than once a year	Never
ITALY	More than 4 times a year	Frequent	Frequent	Frequent	Frequent	Frequent
ITALY	2-4 times a year	Frequent	Frequent	Frequent	Frequent	Occasional
ITALY	Once a year	Frequent	Frequent	Occasional	Occasional	Occasional
ITALY	Less than once a year	Frequent	Frequent	Occasional	Occasional	Non-traveller
ITALY	Never	Frequent	Occasional	Occasional	Non-traveller	Non-traveller

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