Survey into trends in the tourist accommodation sector

(7th wave)

May 2022

Method

October 2021 - 4th wave

Universe of interest:
Companies operating in the tourism industry

Sample size: 6000 interviews

Margin of error (level of reliability 95%) +/- 1.3%

Data collection and processing method
Interview method: CATI and CAWI Type of questionnaire: structured Data processing: SPSS 19.0
Interviews conducted: October 2021

December 2021 - 5th wave

Universe of interest:
Companies operating in the tourism industry

Sample size: 6000 interviews

Margin of error (level of reliability 95%) +/- 1.3%

Data collection and processing method
Interview method: CATI and CAWI Type of questionnaire: structured Data processing: SPSS 19.0
Interviews conducted: December 2021

February 2022 - 6th wave

Universe of interest:
Companies operating in the tourism industry

Sample size: 6118 interviews

Margin of error (level of reliability 95%) +/- 1.3%

Data collection and processing method
Interview method: CATI and CAWI Type of questionnaire: structured Data processing: SPSS 19.0

Interviews conducted: February-March 2022

May 2022 - 7th wave

Universe of interest:
Companies operating in the tourism industry

Sample size: 6001 interviews

Margin of error (level of reliability 95%) +/- 1.3%

Data collection and processing method
Interview method: CATI and CAWI Type of questionnaire: structured Data processing: SPSS 19.0

Interviews conducted: May 2022

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Tourist establishments interviewed as part of the sample

Establishments interviewed as part of the sample

(Data not weighted)

October 2021 - 4th

	Total cases
5-star hotels & 4-star hotels	401
3-star hotels	948
2-star hotels	344
1-star hotels	165
Aparthotels	182
Total Hotel Establishments	**2040**
Campsites, Holiday villages	174
Agritourism establishments	1237
Youth hostels, Holiday homes, Mountain huts, etc.	284
Bed and breakfasts	2265
Total Non-Hotel Establishments	**3960**
Total	**6000**

December 2021 - 5th

	Total cases
5-star hotels & 4-star hotels	402
3-star hotels	949
2-star hotels	345
1-star hotels	160
Aparthotels	182
Total Hotel Establishments	**2038**
Campsites, Holiday villages	174
Agritourism establishments	1239
Youth hostels, Holiday homes, Mountain huts, etc.	284
Bed and breakfasts	2265
Total Non-Hotel Establishments	**3962**
Total	**6000**

February 2022 - 6th wave

	Total cases
5-star hotels & 4-star hotels	401
3-star hotels	948
2-star hotels	344
1-star hotels	165
Aparthotels	182
Total Hotel Establishments	**2040**
Campsites, Holiday villages	174
Agritourism establishments	1237
Youth hostels, Holiday homes, Mountain huts, etc.	402
Bed and breakfasts	2265
Total Non-Hotel Establishments	**4078**
Total	**6118**

May 2022 - 7th wave

	Total cases
5-star hotels & 4-star hotels	403
3-star hotels	941
2-star hotels	346
1-star hotels	163
Aparthotels	184
Total Hotel Establishments	**2037**
Campsites, Holiday villages	177
Agritourism establishments	1237
Youth hostels, Holiday homes, Mountain huts, etc.	285
Bed and breakfasts	2265
Total Non-Hotel Establishments	**3964**
Total	**6001**

The managers of 6001 tourist establishments were interviewed for the seventh wave of research. As in previous waves, they were from not only hotels but also other facilities and spread all over Italy (the North West, North East, Centre, South and Islands).

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1. Looking back

Opening periods and occupancy rates in establishments: the trends

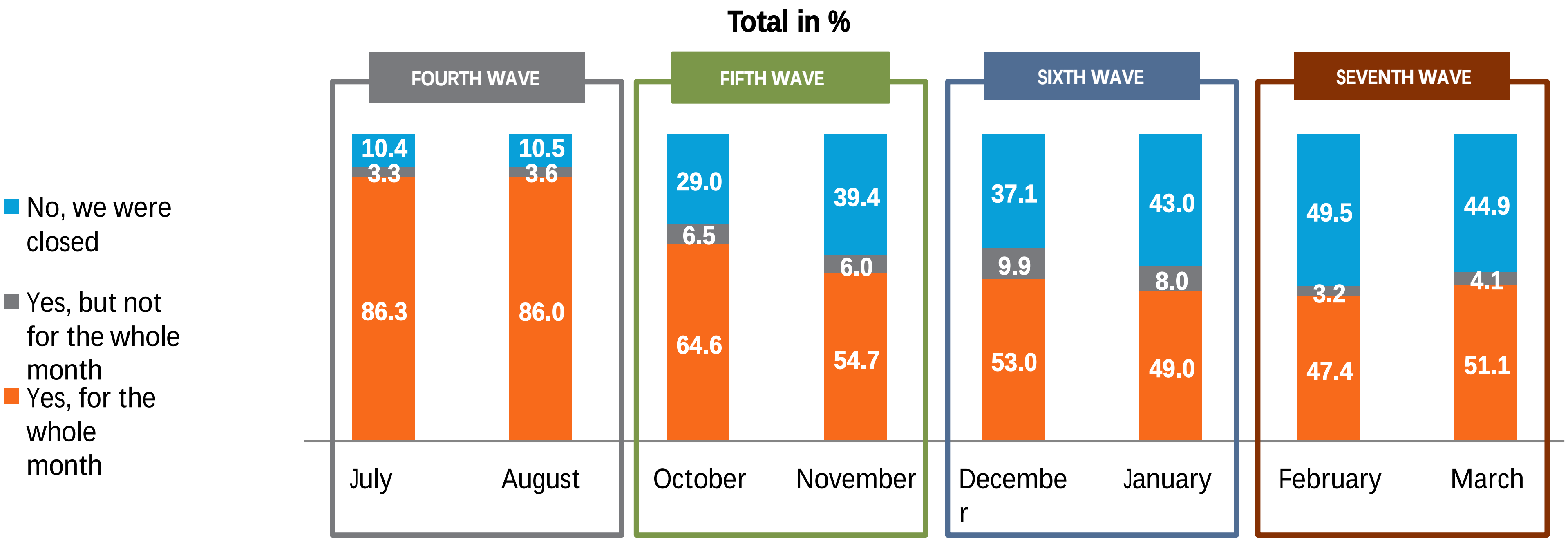
In terms of the opening periods and occupancy rates in establishments, analysis of trends has revealed that:

- With the start of the spring season, the data shows that there has been a slight increase in establishments that are open compared to the winter months. The figures for February are not that different from those for January, but the majority of the managers interviewed stated that in March their establishments were open for the whole month.

- Although the percentage of establishments that were open slowly began to increase once again, the average occupancy rates in this wave - which
covers the months of February and March this year - remained at around 15%.

Opening periods at tourist establishments

The establishment was open in the months of…

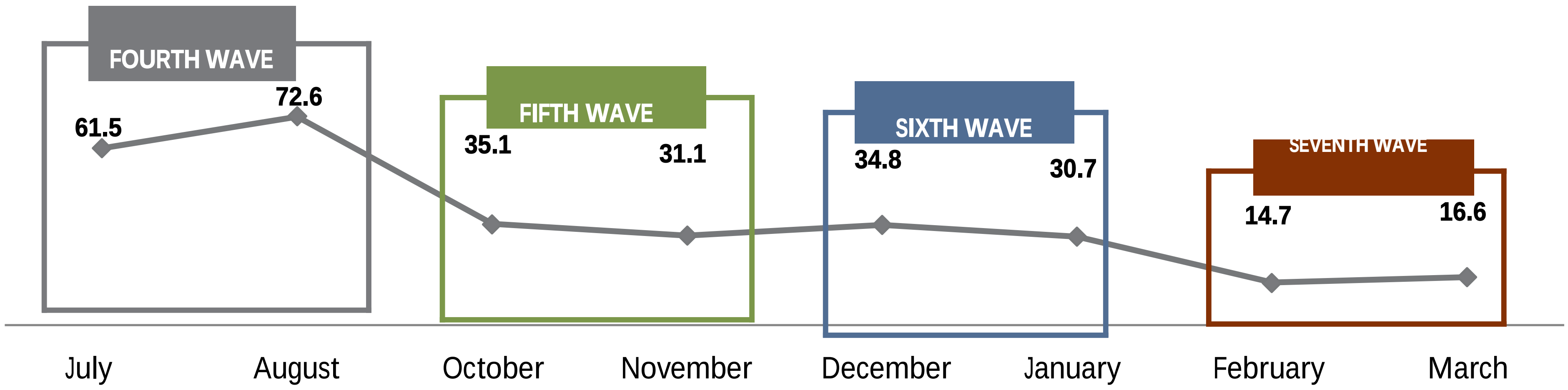


Base: establishments that are open or about to reopen

Average monthly occupancy

As a percentage and taking into account the days when it was open, what was the average occupancy rate in your establishment in the month in question?

Average of the percentages



Base: establishments that were open at the times in question

February and March 2022

- Direct telephone contact was once again the most frequently used way of making bookings in the period in question. The majority of the establishments interviewed stated that it was the most widely used method among customers. Once again, non-hotel establishments had a slightly higher percentage of customers booking by telephone (54%) than hotel establishments (52%). OTAs were the second most popular option and third came the websites or social media accounts of the establishments. Therefore, the internet on the whole was once again the second most widely used channel in the period in question, while around 4% of customers went through travel agents or tour operators.
- In the period in question, couples and families were the most common types of target customers, tending to prefer non-hotel establishments over hotel establishments (77% compared to 67%). Meanwhile, more business customers and groups chose hotels.
- This proved to be another wave in which more visitors came from other regions of Italy than from within the same region. Once again, the majority of foreign customers were from Europe. The highest number of foreign guests continued to come from Germany, followed by France. A look at the types of establishments shows that people from Austria, the United Kingdom and the United States had a tendency to choose hotel establishments for their stays in Italy, whereas visitors from Switzerland and the Netherlands were more likely to choose non-hotel establishments.

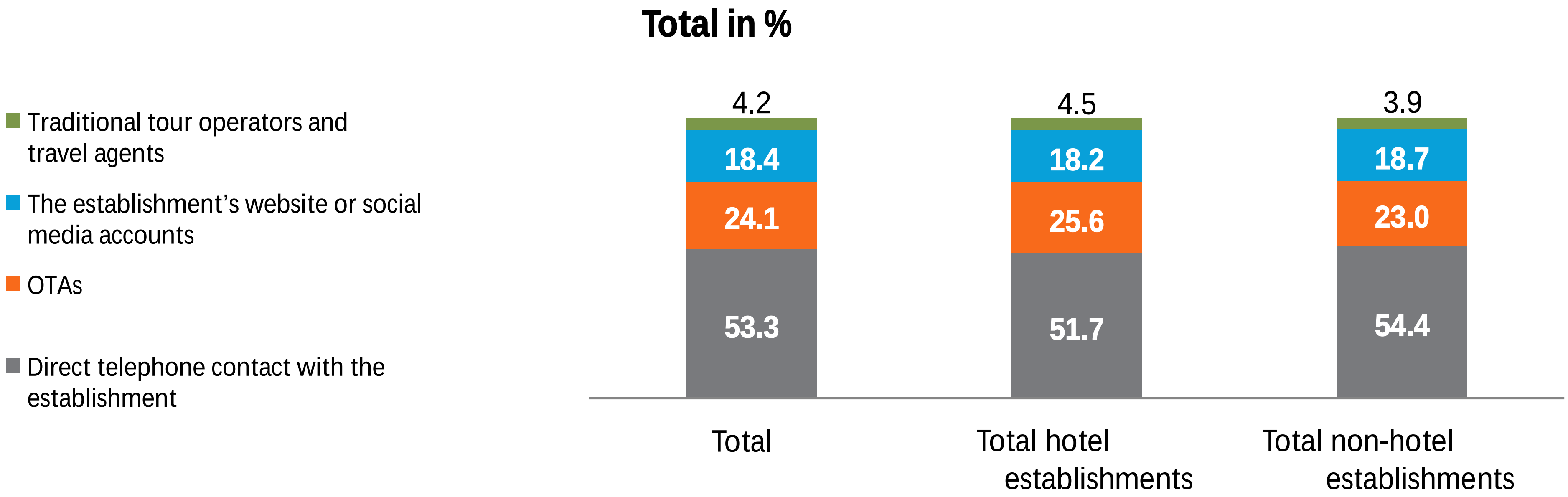
Easter and the long weekend of 25 April 2022

- Approximately 75% of establishments remained open for both Easter and the long weekend ending on 25 April (a public holiday in Italy), reporting an average occupancy rate of approximately one third. The occupancy rate of hotel establishments was higher than that of non-hotel establishments. The war in Ukraine had a minimal impact on bookings, more than 90% of which were confirmed for both periods.
- Telephone contact was once again the most frequently used way of making bookings in the periods in question, followed by the internet. There were no significant differences between hotel establishments and non-hotel establishments.
- Couples and families were the most common types of customers in both periods, followed by tourists travelling for pleasure. Couples and families once again tended to chose non-hotel establishments, while tourists were more likely to choose hotels.
- At Easter and on the long weekend ending on 25 April, the majority of customers in the establishments interviewed were from Italy. More of them came from other regions of the country than from within the same region.

Channels used for bookings in February and March

SEVENTH WAVE

What percentage of all bookings received in February and March 2022 were made using the following channels?



Base: Establishments that received bookings in February 2022 and/or March 2022

Types of guests in February and March

SEVENTH WAVE

What types of guests stayed in your establishment in February and March?

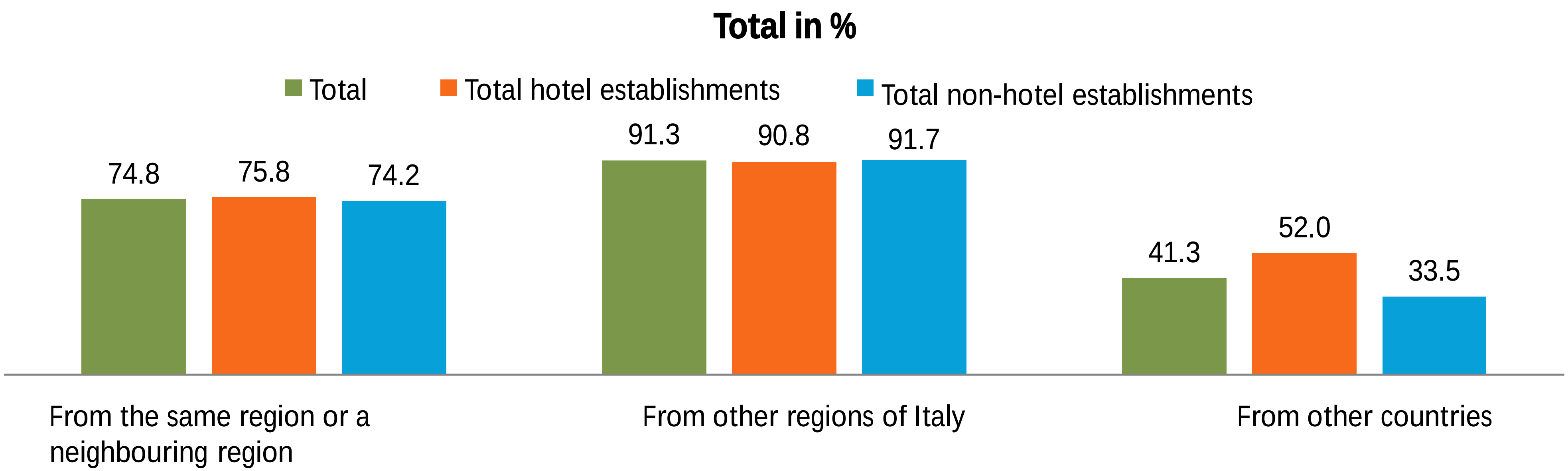
	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	73.0	67.0	77.4
Business customers	30.5	42.1	21.9
Tourists/Leisure travellers	22.7	25.1	21.0
Single travellers	17.9	17.0	18.6
Groups	6.9	11.2	3.8
Students/Schools	2.5	2.4	2.6
Conference attendees	1.6	1.8	1.4
Other	0.3	0.5	0.2
No opinion	-	-	-

Multiple-choice question
Base: open establishments that had customers in February and/or March

Places of origin of guests in February and March

SEVENTH WAVE

In February and March, where did the guests staying in your establishment come from?



Base: establishments that had customers in February and March
Multiple-choice question

Places of origin of guests staying in February and March

SEVENTH WAVE

What were the three main countries of origin of foreign customers in February and March?

	Total in %	Total hotel establishments	Total non-hotel establishments
Germany	67.2	68.9	65.1
France	46.0	46.6	45.4
Switzerland	12.7	10.1	15.6
Austria	12.5	15.4	9.3
United Kingdom	10.5	12.1	8.6
United States	9.5	10.8	8.0
Belgium	8.0	6.8	9.3
Netherlands	7.5	3.1	12.6
Poland	6.0	7.3	4.5
Spain	4.9	3.7	6.4
Other	15.1	14.8	15.4

Multiple-choice question
Base: open establishments that had foreign customers in February and/or March 2022

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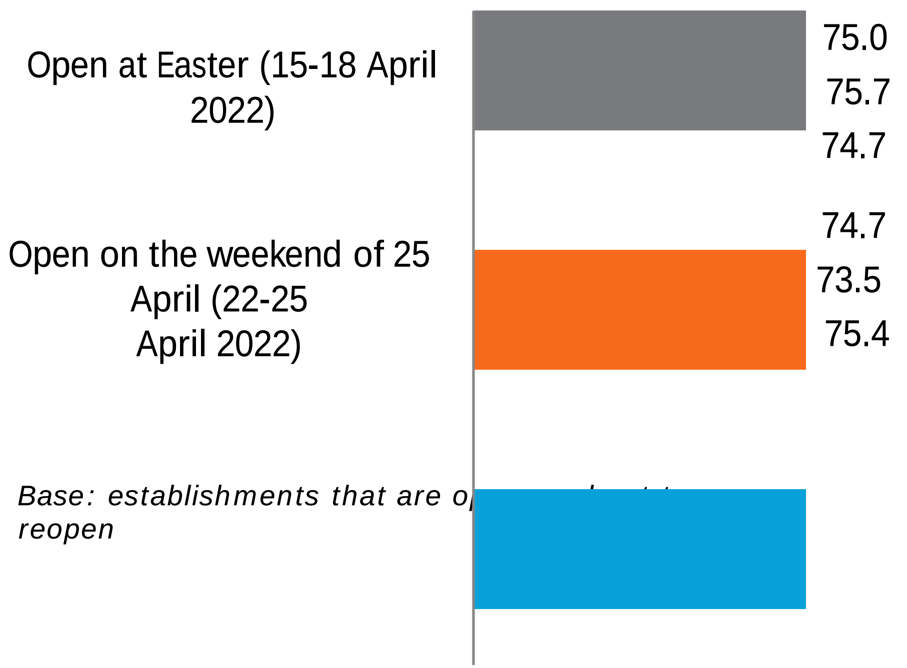
Easter / Weekend of 25 April: occupancy rate of tourist establishments

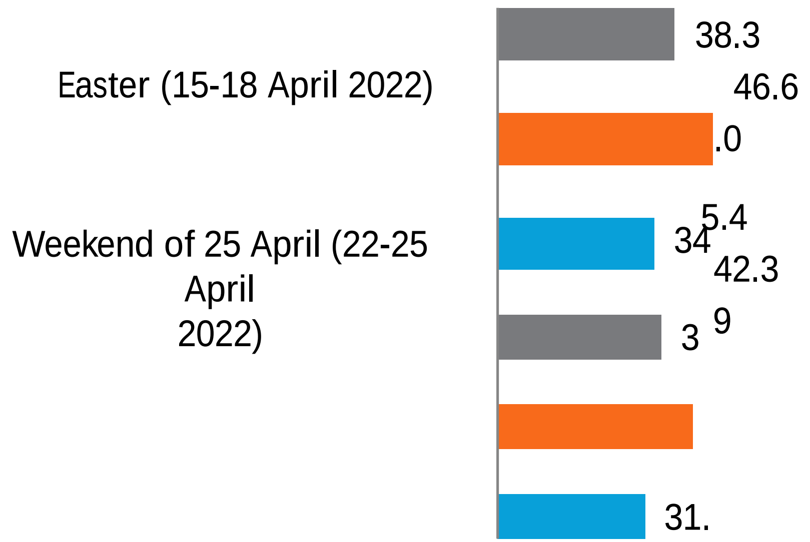
SEVENTH WAVE

Was your establishment open at the following times?

Yes, we were open (%)



As a percentage (and taking into account the days when it was open), what was the actual occupancy rate in your establishment at the following times?

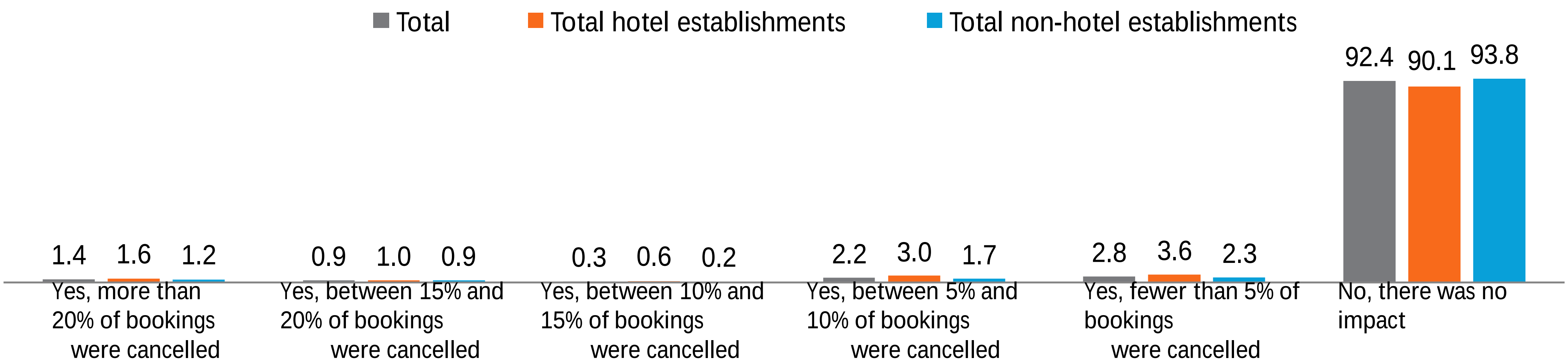


Base: establishments that are o... reopen

Impact of the war in Ukraine on bookings for Easter

SEVENTH WAVE

Were any of your establishment's bookings for Easter and the weekend of 25 April cancelled due to the war in Ukraine? If so, how many?



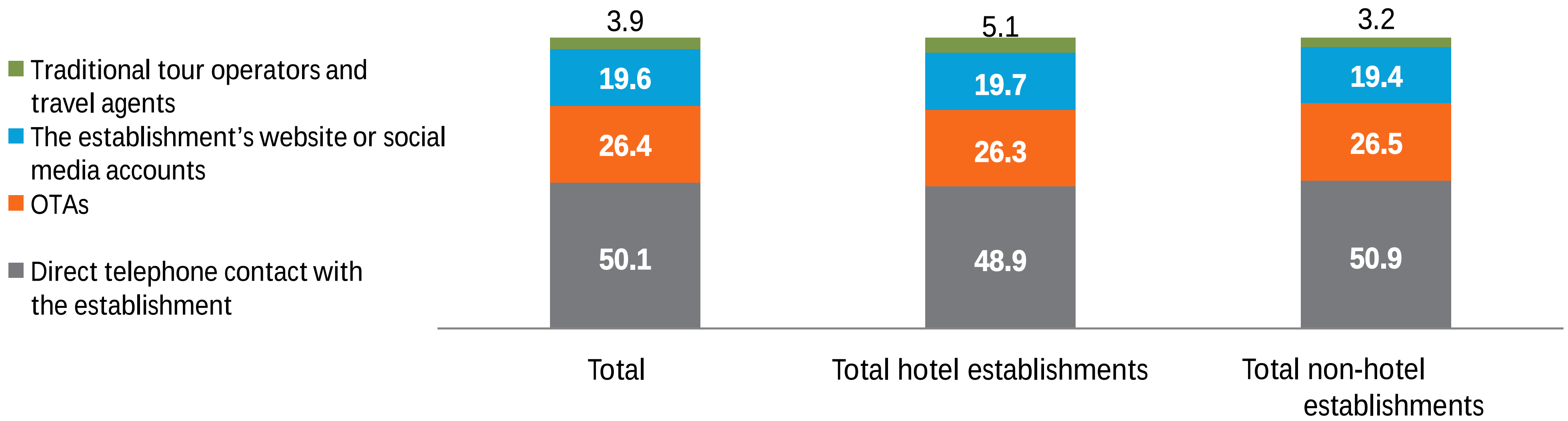
Base: establishments that are open or about to reopen

Easter / Weekend of 25 April: channels used for bookings

SEVENTH WAVE

What percentage of all bookings for Easter (15-18 April 2022) and the weekend of 25 April (22-25 April 2022) were made using the following channels?

Total in %



Base: establishments that are open or about to reopen

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Types of guests at Easter and on the weekend of 25 April

SEVENTH WAVE

What types of guests stayed at your establishment at Easter (15-18 April 2022) and on the weekend of 25 April (22-25 April)?

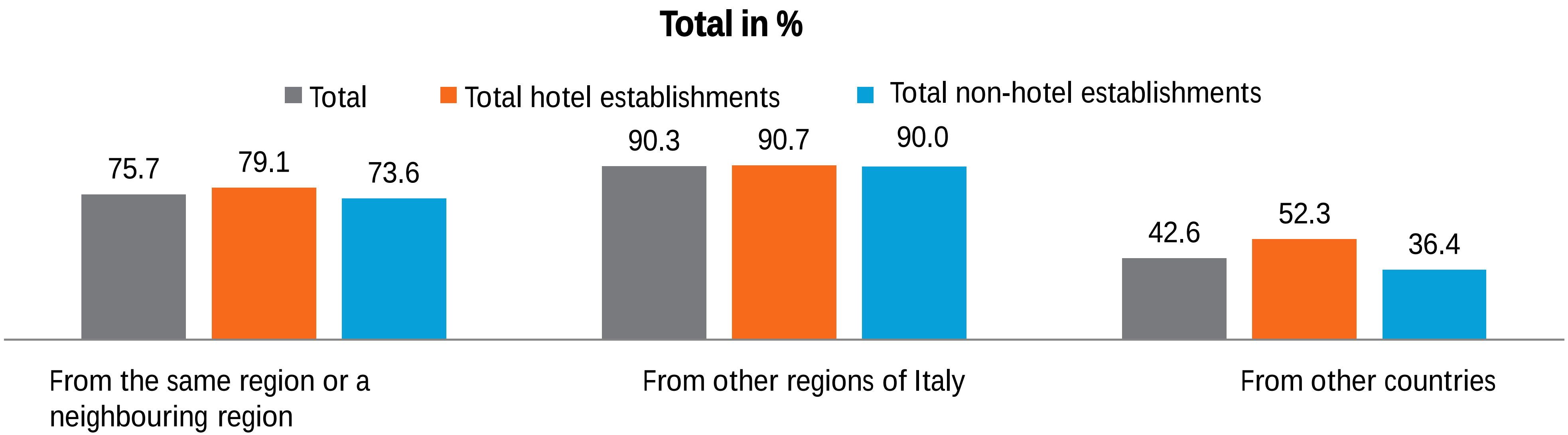
	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	87.1	83.7	89.2
Tourists/Leisure travellers	25.6	30.2	22.7
Single travellers	14.9	16.2	14.1
Business customers	11.1	17.8	7.0
Groups	8.2	9.9	7.2
Conference attendees	1.4	2.7	0.5
Students/Schools	1.3	2.0	0.8
Other	0.1	0.4	-
No opinion	0.1	-	0.1

Multiple-choice question
Base: establishments that are open or about to reopen

Easter / Weekend of 25 April: places of origin of guests

SEVENTH WAVE

In general, at Easter (15-18 April 2022) and on the weekend of 25 April (22-25 April), where did the guests staying in your establishment come from?



Multiple-choice question
Base: establishments that are open or about to reopen

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2.
Predictions for the coming months

Predictions for the coming months

- At present, approximately 75% of the establishments interviewed say that they have bookings in June and July, while the figure for August is roughly 65%. The percentage is higher among hotel establishments than non-hotel establishments.

- Among the establishments that say they are receiving bookings, the occupancy rate is roughly 28% for the period between June and August. A preference is being shown for hotel establishments over non-hotel establishments.

- In addition to the bookings that have already been made, the estimated occupancy rate is increasing among the establishments included in the survey. This is especially true of the summer season, when it is expected to reach more than 60% of capacity on average. The managers of hotels are more optimistic than their counterparts at non-hotel establishments in this respect.
- Direct telephone contact was the most popular booking method, but internet-based approaches “made up ground” on it. Non-hotel establishments are slightly more likely to take advantage of OTAs than hotel establishments.

- Couples and families are once again the target customers booking the most stays at tourist establishments. Business customers and tourists travelling for pleasure are more likely to opt for hotels.

Predictions for the coming months

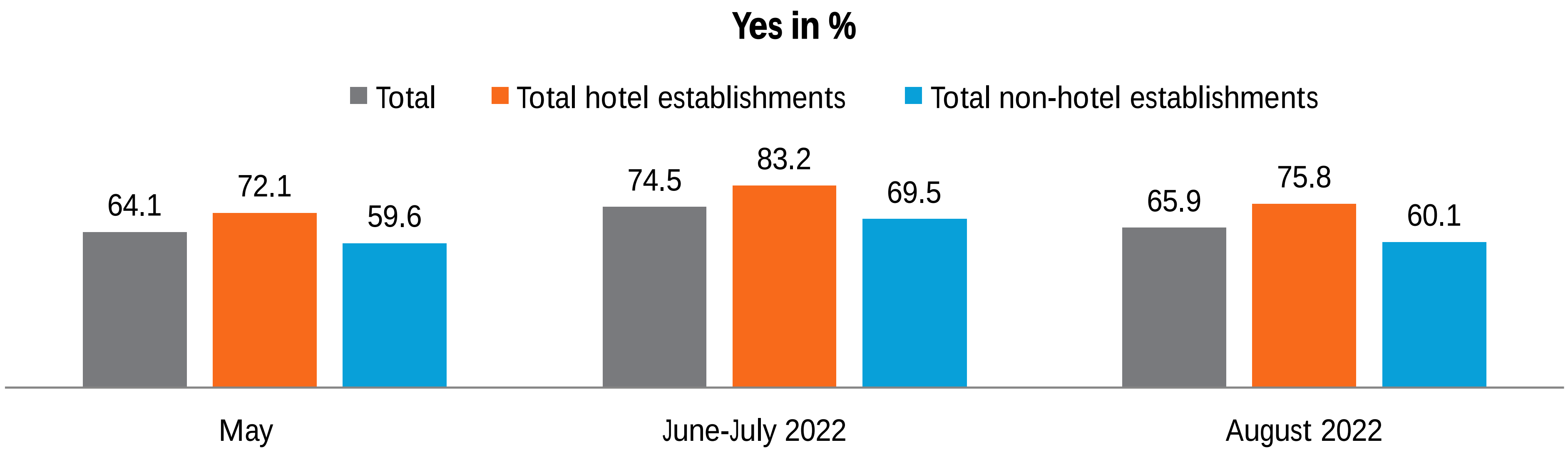
- Once again, most of the customers that are booking stays in the summer months are from Italy. In most cases, they are from other regions of the country. However, there has been growing interest among people from other countries, who are now behind 50% of bookings.

- The vast majority of international bookings are from Europe. A look at the types of establishments shows that people from Germany and Austria continue to prefer hotels on the whole, whereas guests from the Netherlands are more likely to choose non-hotel establishments.

Bookings at tourist establishments in the coming months

SEVENTH WAVE

The establishment currently has bookings for…



Base: establishments that are open or about to reopen

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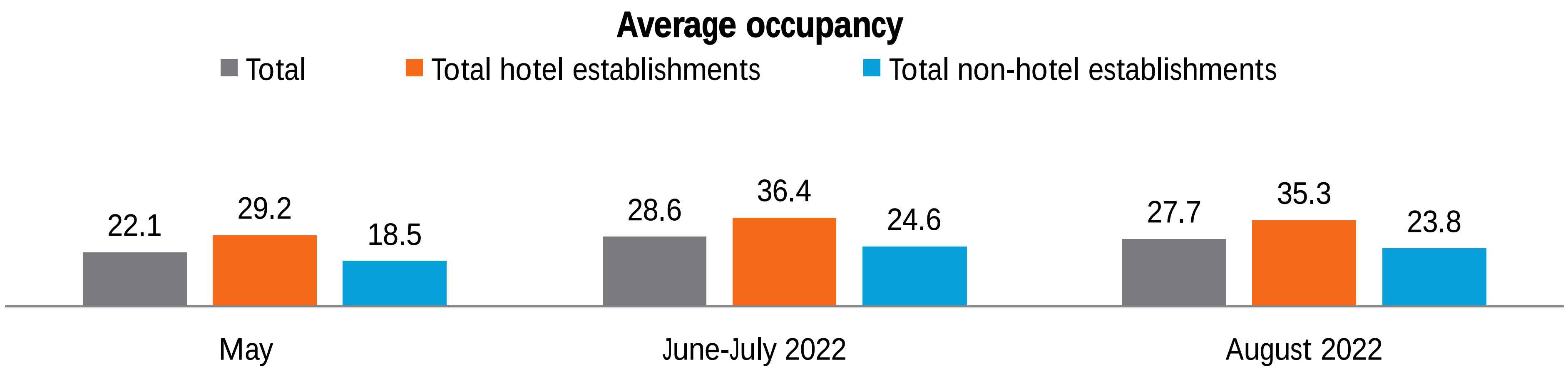
Occupancy rates at tourist establishments in the coming months

SEVENTH WAVE

As a percentage, what is the average occupancy rate of your establishment in the following months?



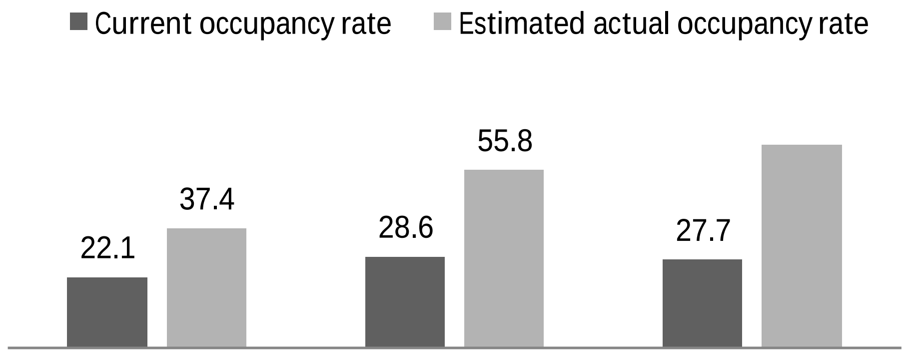
Base: establishments that stated they are receiving bookings

Estimated occupancy rates in the coming months

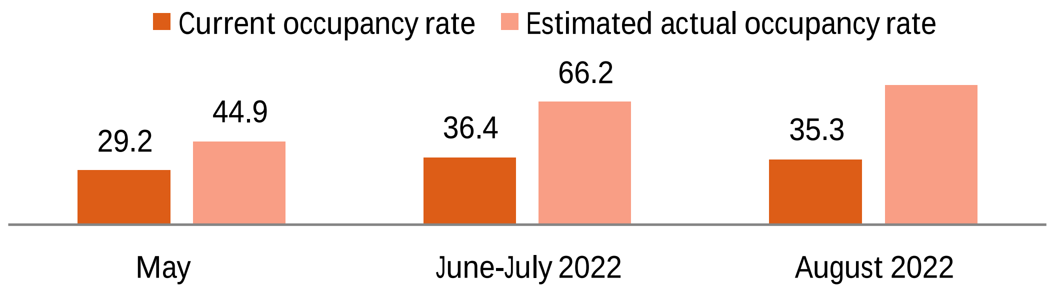
SEVENTH WAVE

What do you estimate will be the actual occupancy rate of your establishment in the coming months, bearing in mind that other bookings might be made or the current bookings might be cancelled?

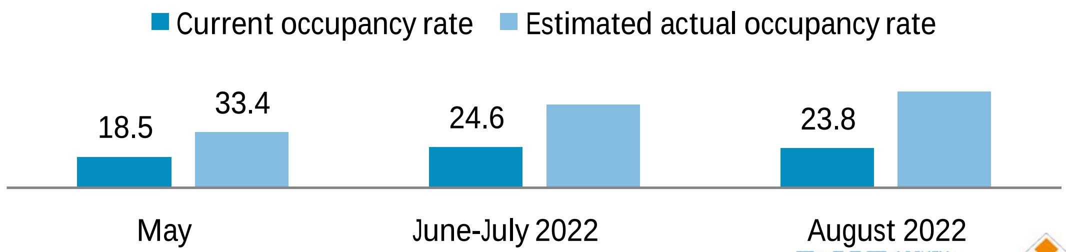
Average at all establishments



Average at hotel establishments



Average at non-hotel establishments



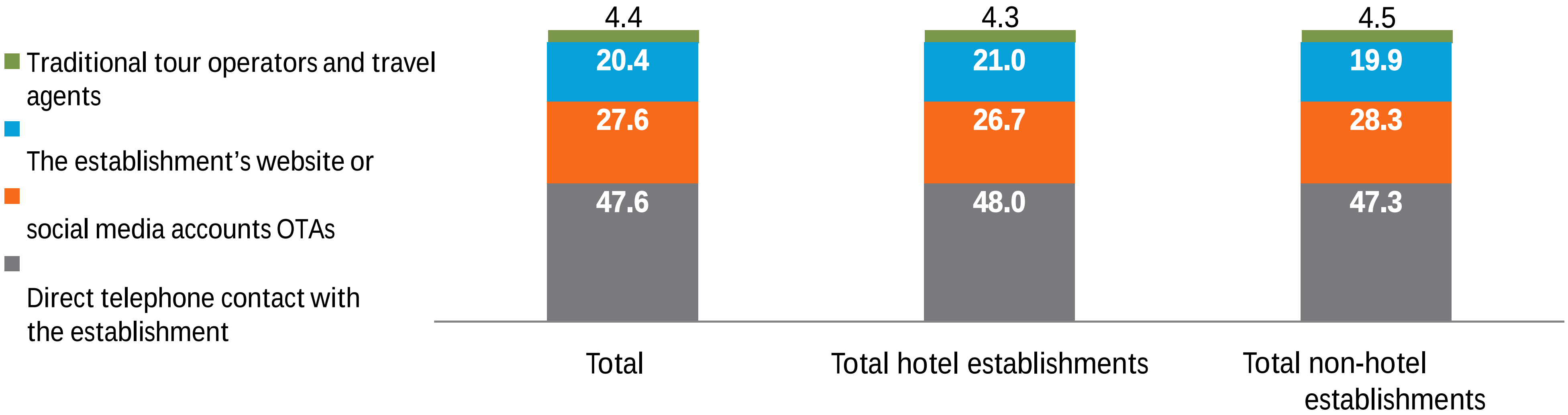
Base: establishments that are receiving bookings

Channels used for bookings

SEVENTH WAVE

What percentage of all current bookings were made using the following channels?

Total in %



Base: establishments that are receiving bookings

Types of guests that are booking for the coming months

SEVENTH WAVE

At present, what types of guests are making booking requests?

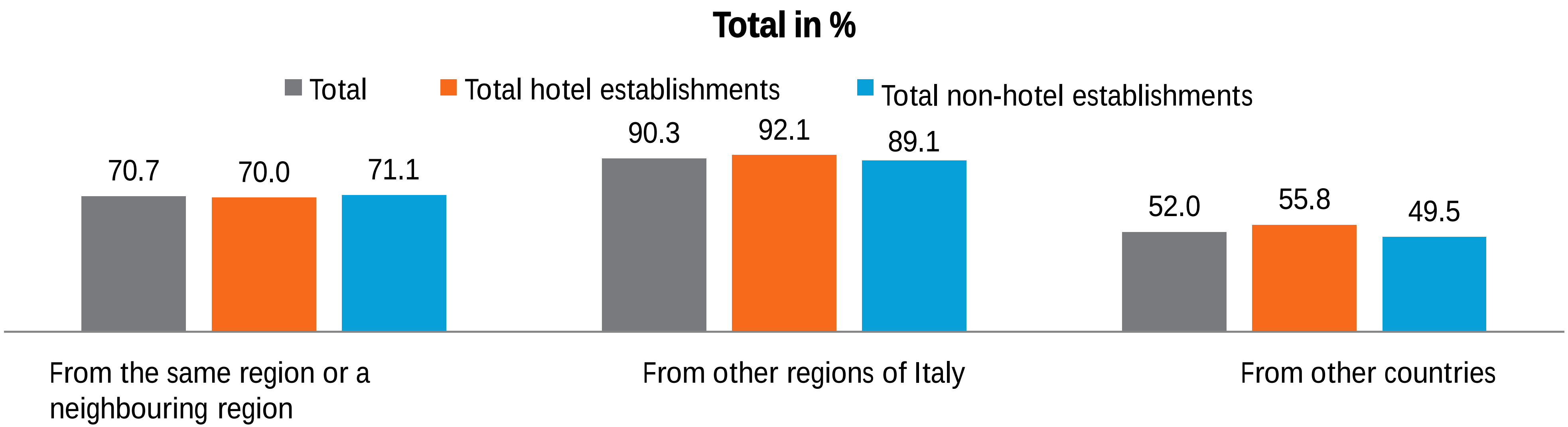
	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	88.3	86.2	89.7
Tourists/Leisure travellers	30.7	33.3	29.0
Single travellers	16.6	19.0	14.9
Business customers	11.0	18.2	6.2
Groups	9.0	10.5	8.0
Conference attendees	2.2	3.2	1.5
Students/Schools	1.7	2.2	1.3
Other	0.2	0.3	0.1
No opinion	0.1	0.0	0.1

Multiple-choice question
Base: establishments that are receiving bookings

Places of origin of customers making bookings for the coming months

SEVENTH WAVE

Where are most bookings coming from?



Multiple-choice question
Base: establishments that are receiving bookings

Places of origin of guests that are booking for the coming months

SEVENTH WAVE

What are the three main countries of origin of foreign customers that are making bookings for the coming months?

	Total in %	Total hotel establishments	Total non-hotel establishments
Germany	79.1	83.3	76.0
France	46.2	48.5	44.4
Switzerland	16.6	18.5	15.1
Austria	16.5	22.1	12.3
Netherlands	12.2	5.8	17.1
Belgium	9.5	7.9	10.7
United Kingdom	8.0	8.6	7.6
United States	7.7	8.4	7.2
Spain	3.9	3.0	4.5
Poland	3.5	3.4	3.7
Denmark	2.6	1.2	3.6
Other	10.4	9.3	11.3

Multiple-choice question
Base: establishments that are receiving bookings from foreign customers

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3.
Predictions for the near future

Predictions for the near future

- Compared to the previous survey, there has been an increase in the confidence voiced by the managers of tourist establishments that were interviewed. 80% of them are now feeling confident, compared to 72% in the last wave. The managers of hotel establishments are slightly more optimistic than those of non-hotel establishments.
- The people who expect a fall in turnover outnumber those who expect an increase, although there are not as many of the former as in the last survey. Notably, compared to the last survey there has been an increase in the amount of establishments that expect that in 2022 their turnover will already return to - or even surpass - pre-pandemic levels. Essentially, in economic terms the managers interviewed are showing optimism that stems not from growth but from a recovery in comparison to pre-pandemic levels.
- The same applies to the number of customers, which this year in particular is expected to be in line with pre-pandemic levels. With regard to the places of origin of customers, generally speaking there is expected to be an increase in Italian customers and a fall in visitors from other countries. However, there was a less marked tendency on this front compared to the previous survey.

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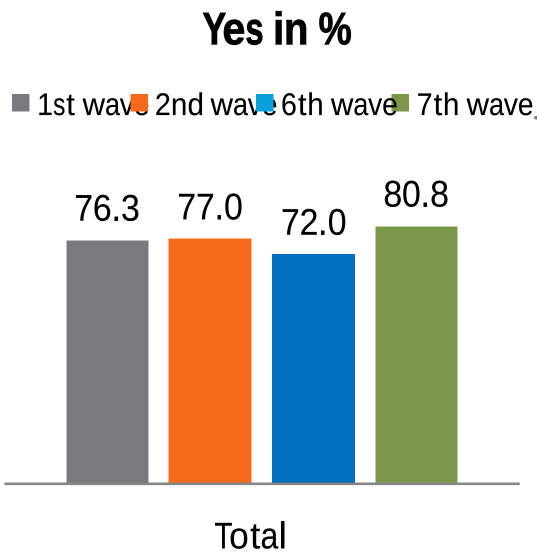
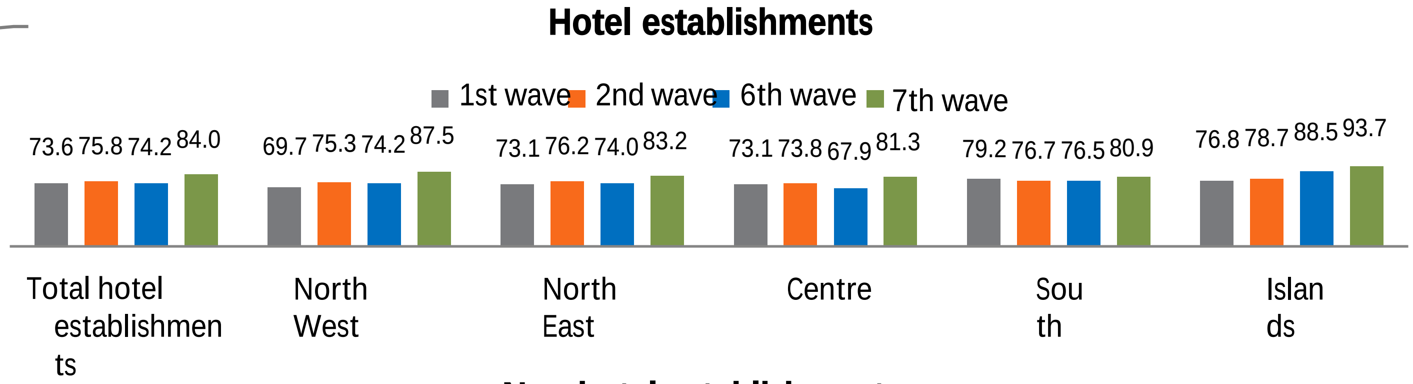
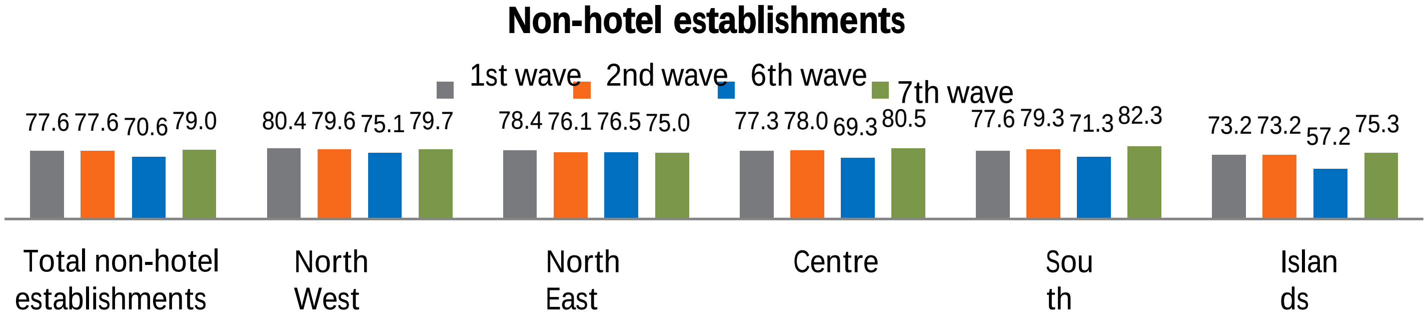
Confidence in growth in the tourist industry

Do you feel confident about the recovery of the tourist industry in Italy?







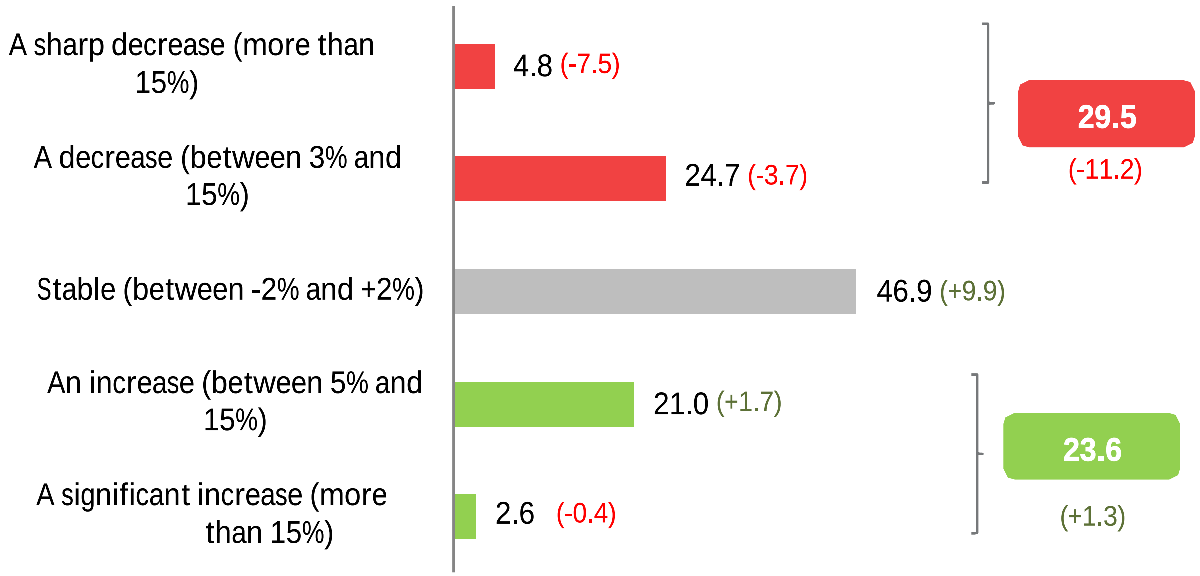
Base: establishments that are open or about to reopen

Predicted trends in turnover in 2022

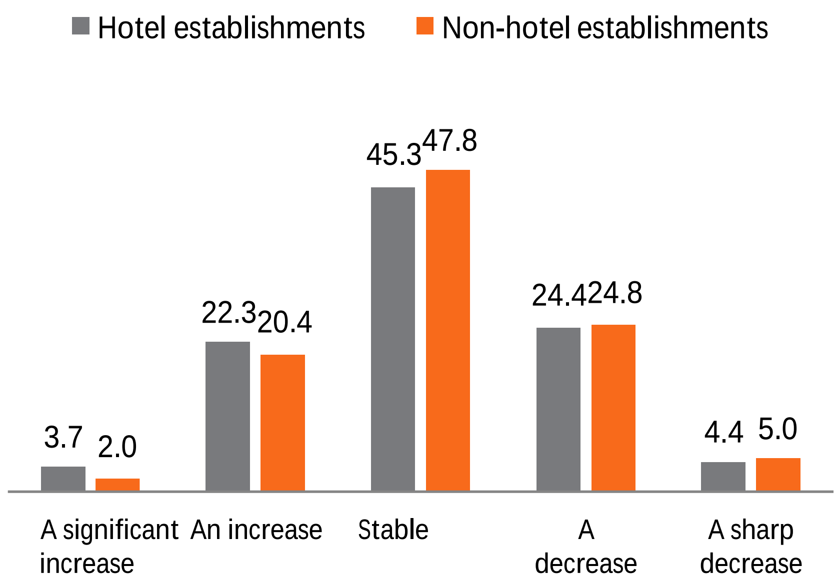
SEVENTH WAVE

Compared to 2019 (i.e. before the pandemic), what trend do you expect to see in the turnover of your establishment in 2022?

Total in %



Total in %



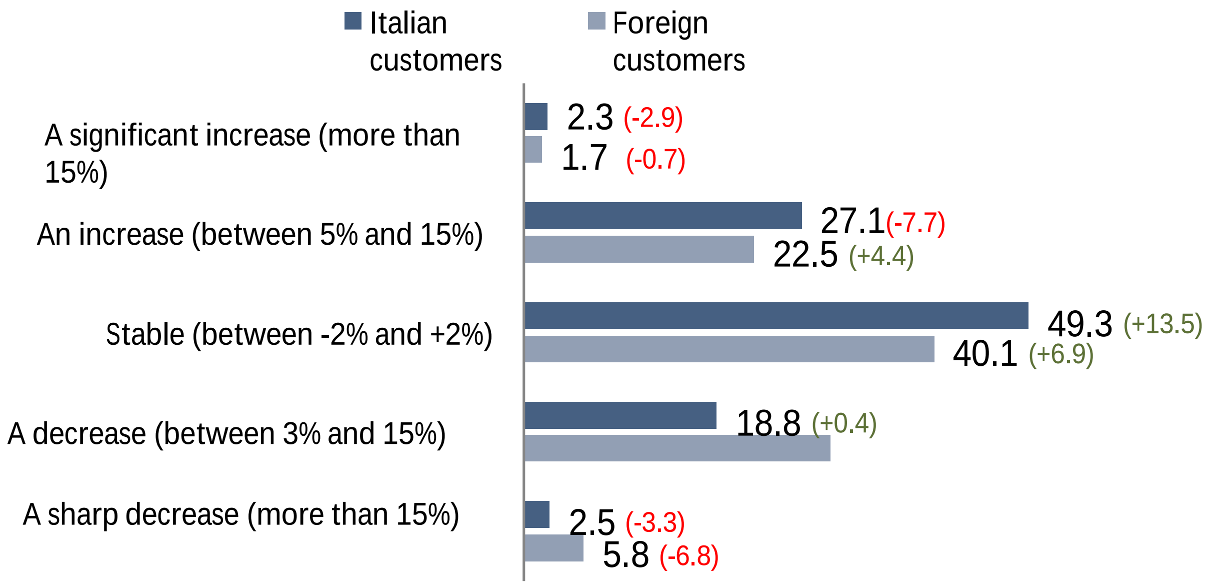
Base: establishments that are open or about to reopen
The figures in brackets show the differences compared to the previous survey

Predicted customer numbers in 2022

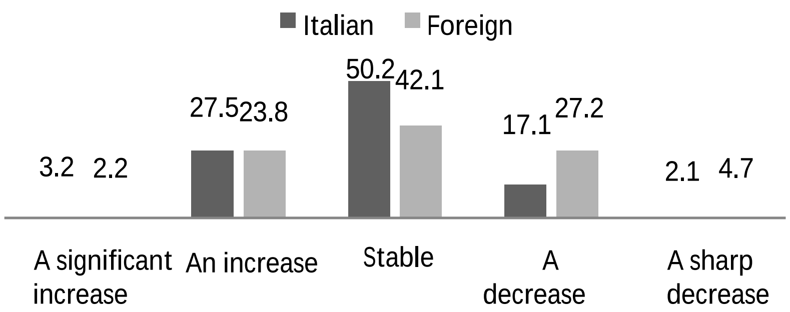
SEVENTH WAVE

How do you think your number of customers in 2022 will compare to 2019 (i.e. before the pandemic)?

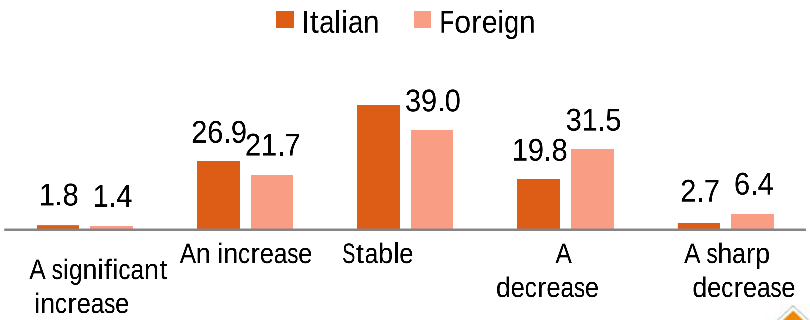
Total in %



Hotel establishments in %



Non-hotel establishments in %



Base: establishments that are open or about to reopen
The figures in brackets show the differences compared to the previous survey

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4.
Impact of the war in Ukraine

Impact of the war in Ukraine on establishments

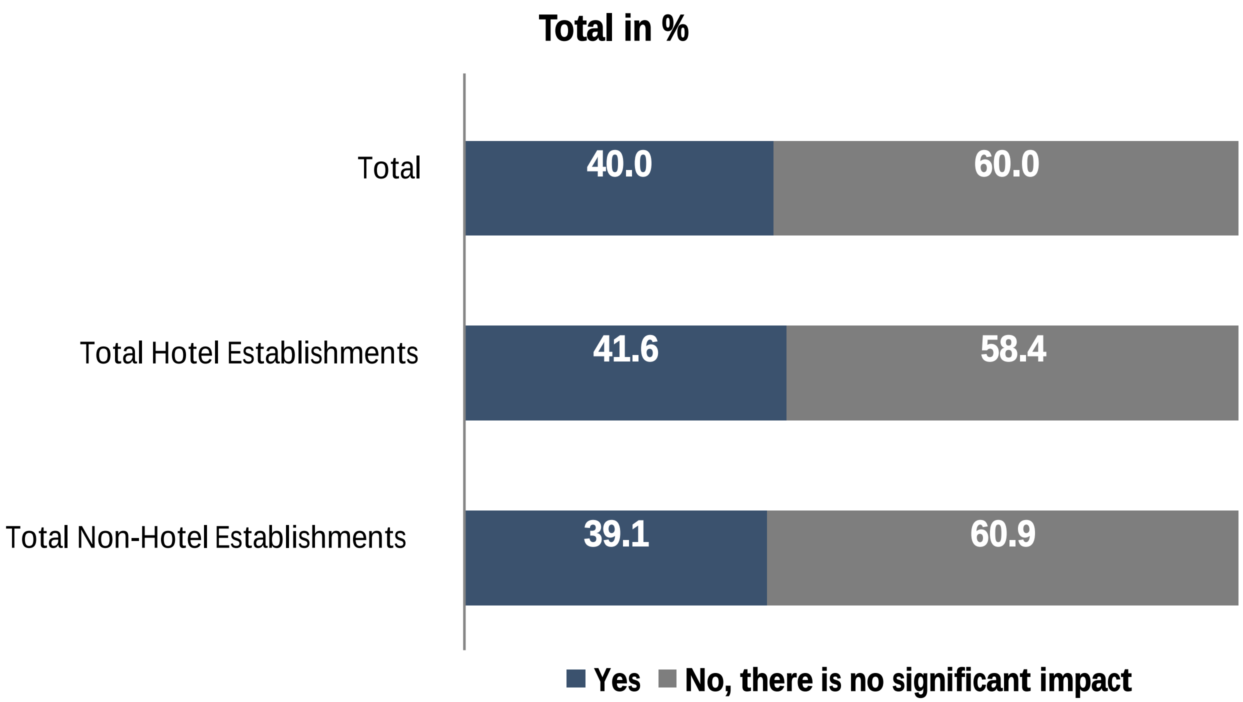
- Approximately 40% of the establishments interviewed stated that the war in Ukraine is having an impact on their business. It is affecting hotel establishments more than non-hotel establishments.

- The increase in gas and energy costs is the factor that is having the biggest impact. It is really making its mark on the running costs of establishments. The next biggest factor is a drop in the number of foreign guests, which was reported by approximately 30% of establishments. Around 20% of the managers interviewed mentioned difficulties procuring goods and services, which affected hotels more than other establishments.

Impact of the war in Ukraine

SEVENTH WAVE

Is the war in Ukraine having an impact on business in your establishment?



Base: establishments that are open or about to reopen

Impact of the war in Ukraine

SEVENTH WAVE

What are the main ways in which the war in Ukraine has had an impact on your establishment?

	Total in %	Total hotel establishments	Total non-hotel establishments
Higher gas and energy costs	93.8	92.8	94.4
Fewer foreign guests	31.8	32.2	31.6
Difficulties procuring goods and services	20.8	24.7	18.5
Reduced capacity of guests to spend money on additional services	15.6	15.9	15.4
Fewer Italian guests	14.6	12.6	15.8
Reduction in the average length of customer stays	9.3	10.5	8.6
Other	0.7	0.7	0.6

Multiple-choice question
Base: establishments that are open or about to reopen

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TABLES