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ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Survey on the performance of the tourism and hospitality sector

(5th wave)

December 2021

Methodology

July 2021- 3rd wave	October 2021- 4th wave	December 2021 - 5th wave
Reference population Companies operating in the tourist sector Sample size 6000 interviews Margin of error (level of reliability 95%) +/- 1.3% Information collection and data processing method Interview method: CATI Type of questionnaire: structured Data processing: SPSS 25.0 Conducting of interviews July 2021	Reference population Companies operating in the tourist sector Sample size 6000 interviews Margin of error (level of reliability 95%) +/- 1.3% Information collection and data processing method Interview method: CATI Type of questionnaire: structured Data processing: SPSS 25.0 Conducting of interviews October 2021	Reference population Companies operating in the tourist sector Sample size 6000 interviews Margin of error (level of reliability 95%) +/- 1.3% Information collection and data processing method Interview method: CATI Type of questionnaire: structured Data processing: SPSS 25.0 Conducting of interviews December 2021

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Sample of tourism facilities interviewed

Sample of facilities interviewed
(non-weighted data)

July 2021-3rd wave

	Total cases
5-Star Hotels + 4-Star Hotels	406
3-Star Hotels	961
2-Star Hotels	353
1-Star Hotels	173
Aparthotels	189
Total hotel facilities	**2,082**
Campsites - Holiday villages	178
Farm holiday accommodation	1,240
Youth hostels, Not-for-profit accommodation, Mountain huts, etc.	288
Bed and Breakfast	2,219
Total non-hotel facilities	**3,925**
Total	**6,007**

October 2021-4th 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 facilities	**2,040**
Campsites - Holiday villages	174
Farm holiday accommodation	1237
Youth hostels, Not-for-profit accommodation, Mountain huts, etc.	284
Bed and Breakfast	2,265
Total non-hotel facilities	**3,960**
Total	**6,000**

December 2021-5th wave

	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 facilities	**2,038**
Campsites - Holiday villages	174
Farm holiday accommodation	1,239
Youth hostels, Not-for-profit accommodation, Mountain huts, etc.	284
Bed and Breakfast	2,265
Total non-hotel facilities	**3,962**
Total	**6,000**

As in the previous surveys, for the fifth wave of the study, we interviewed the managers of 6,000 tourist accommodation facilities, both hotels and other types, located all over Italy (North-West, North-East, Centre, South and Islands).

1.
Period October-December 2021
Report on activity

a5

Report on October-November

- **Following the stop imposed by the pandemic, in the summer season, the percentage of activities open rose from 74.5% in June to over 85% in July and August. Naturally, there was a drop in the number of facilities open in autumn (65% in October and 55% in November).**

- **Average occupation rates, which this summer returned almost to pre-pandemic levels, fell again during autumn, to 35% in October and 31% in November.**

- **With regard to where tourists came from, the same trend was observed as in the summer. Most guests were from other regions in Italy (87% in October and 89% in November); there was a rise in the percentage of visitors from neighbouring regions (69% in October and 73% in November), while there was a drop in visitors from abroad (39% in October, 36% in November).**

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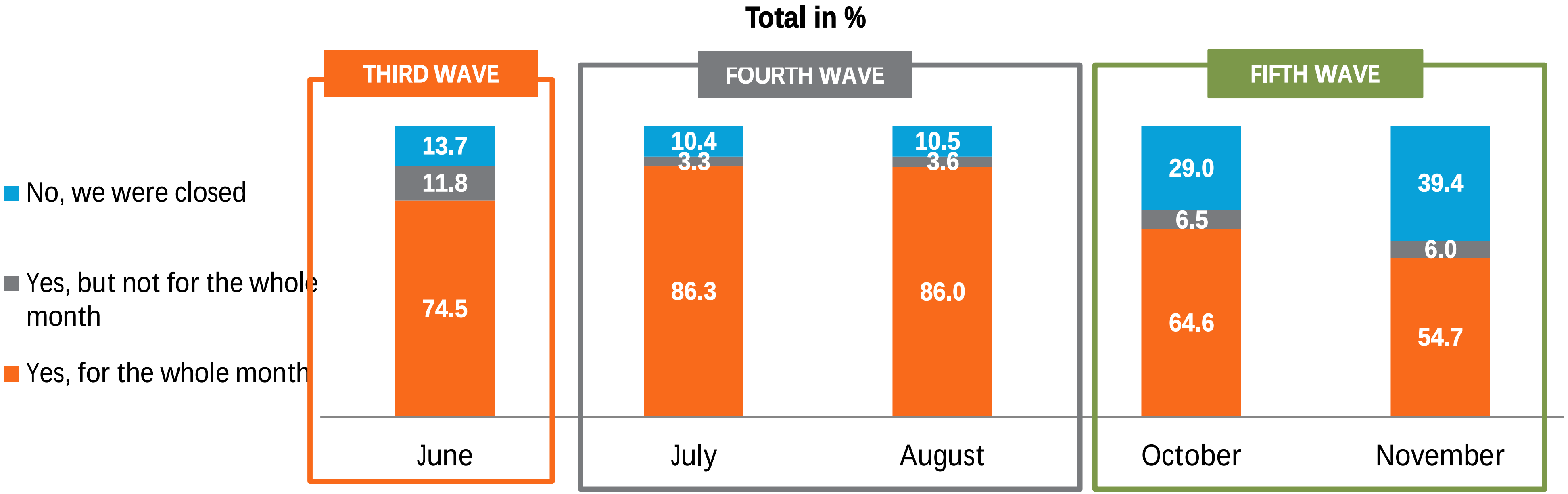
Diapositiva 6

a5 non riesci a capire i numeri - 87% italiani, 39% stranieri?
ann-e; 21/01/2023

Opening period of tourist accommodation facilities

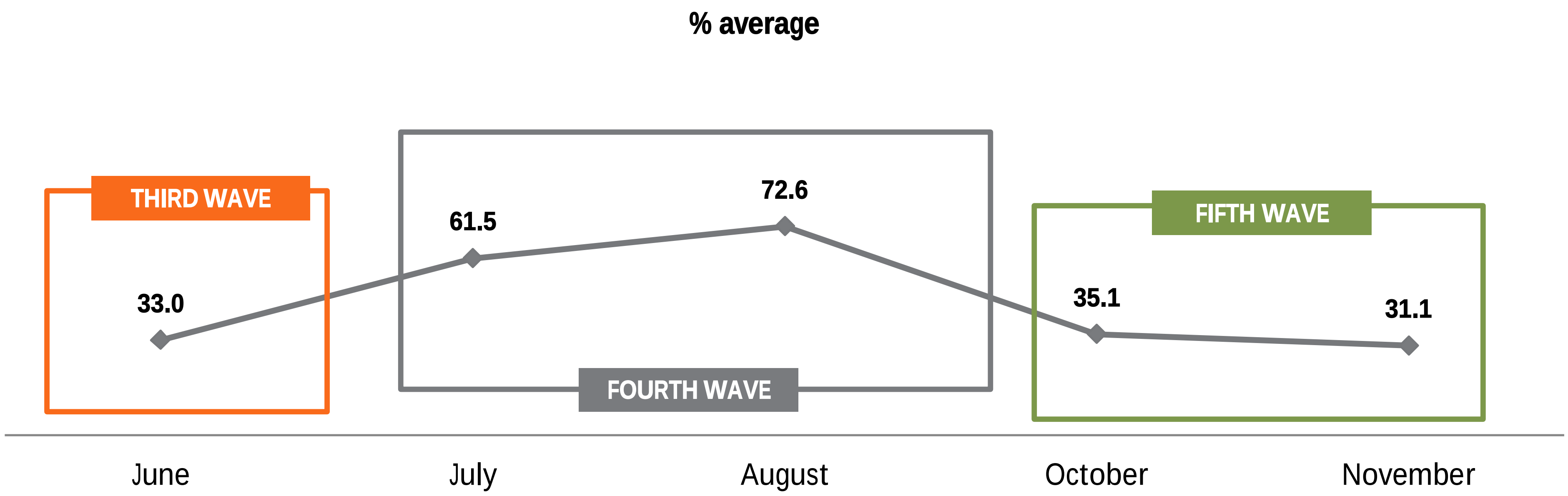
Was the facility open during the months of...



Base: facilities open or about to reopen

Average monthly occupation rates

In percentage terms, with regard to the days you were open, what was the average occupation rate of the facility for the month?



Base: facilities open during the reference period

Origin of guests

During the month, guests in your facility came…

	THIRD WAVE	FOURTH WAVE		FIFTH WAVE	
	June 021	July 021	August 021	October 021	November 021
from the same region or neighbouring regions	72.8	65.7	65.8	69.0	72.8
from other regions in Italy	79.5	90.2	91.6	87.1	89.4
from abroad	29.8	53.1	55.4	39.5	36.0

Base: facilities that had guests during the reference period
Questions with multiple answers

Report on December

- **The month of December witnessed confirmation of the downward trend in occupation levels: the general figure was 29%, but the stop mainly regarded non-hotel facilities, only a quarter (25%) of which were occupied during the period. Hotels fared better, with managers declaring a level of occupation of 36%.**

- **In line with the preceding months, it was mainly couples and families who occupied the facilities, specifically preferring non-hotel facilities, in contrast to business guests, who preferred hotels.**

- **With regard to origin, the trend for mainly Italian guests was evident once again, although a higher percentage were from regions other than those in which the facilities are located. Around 30% of foreign guests chose hotel facilities for their stay over other types of accommodation.**

- **The channels used by guests for booking did not differ significantly according to the type of facility. In general, guests had a slight preference for the most direct channel, to a slightly larger extent for non-hotel facilities than for hotel facilities. "Virtual" booking systems (OTA, websites and social media pages of the facilities) were used by a similar percentage of guests overall, to a slightly greater extent for contacting hotels than for contacting other accommodation facilities.**

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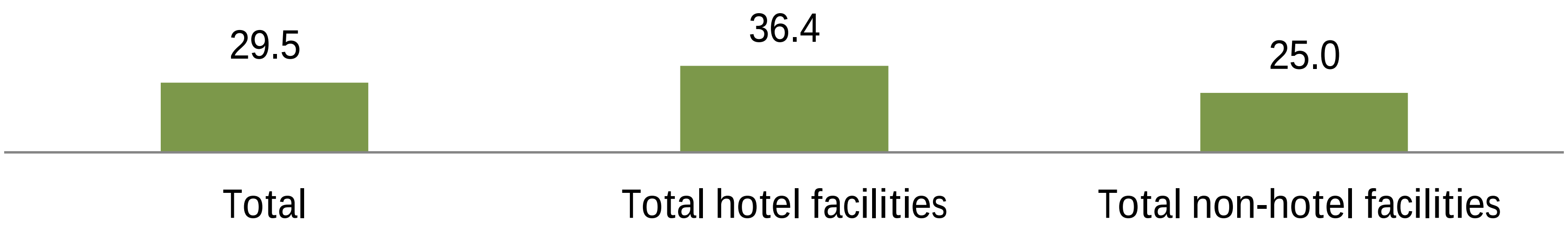
% of occupation of tourist accommodation facilities in the month of December

FIFTH WAVE

In percentage terms, (considering the days you were open) what was the effective occupation rate of your facility during the month of December?

% average occupation



Base: facilities open in the month of December

Type of guests in the facility in the month of December

FIFTH WAVE

What type of guests visited your facility during the month of December?

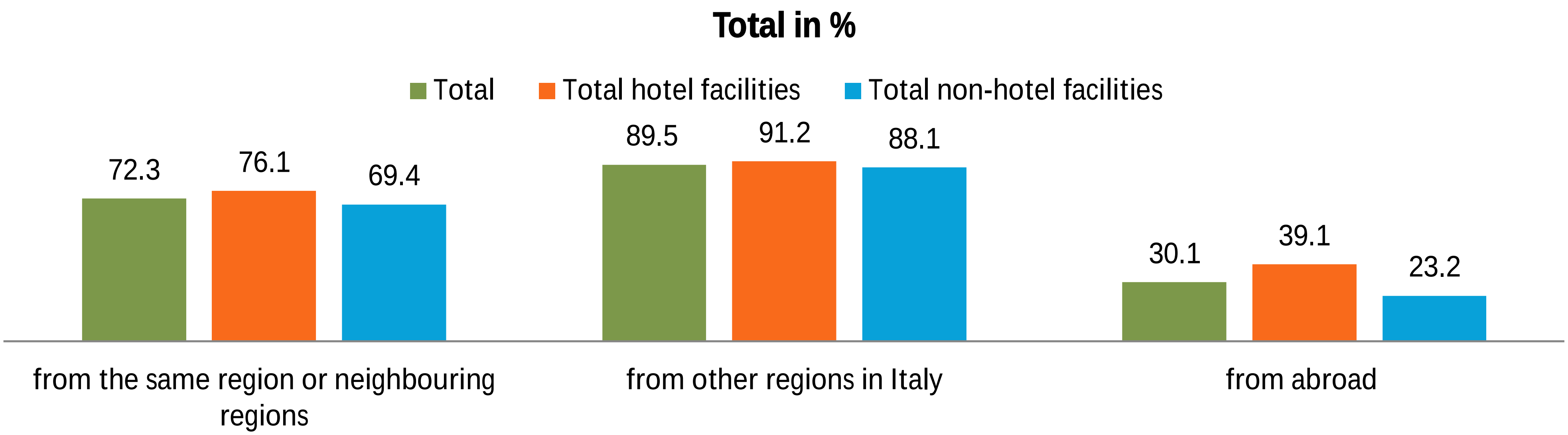
	Total in %	Total hotel facilities	Total Non-Hotel Facilities
Couples - families	71.9	67.7	**75.1**
Tourists - pleasure travellers	22.6	24.9	20.8
Business travellers	22.2	**31.6**	14.9
Individual travellers	16.7	18.2	15.6
Groups	6.5	6.3	6.7
Students - schools…	1.2	1.0	1.3
Congress participants	1.1	1.6	0.8
Other	0.4	0.2	0.5
No opinion	0.7	0.4	0.8

Question with multiple answers
Base: facilities open that had guests in the month of December

Origin of guests in the month of December

FIFTH WAVE

With regard to origin, guests in your facility in the month of December came…

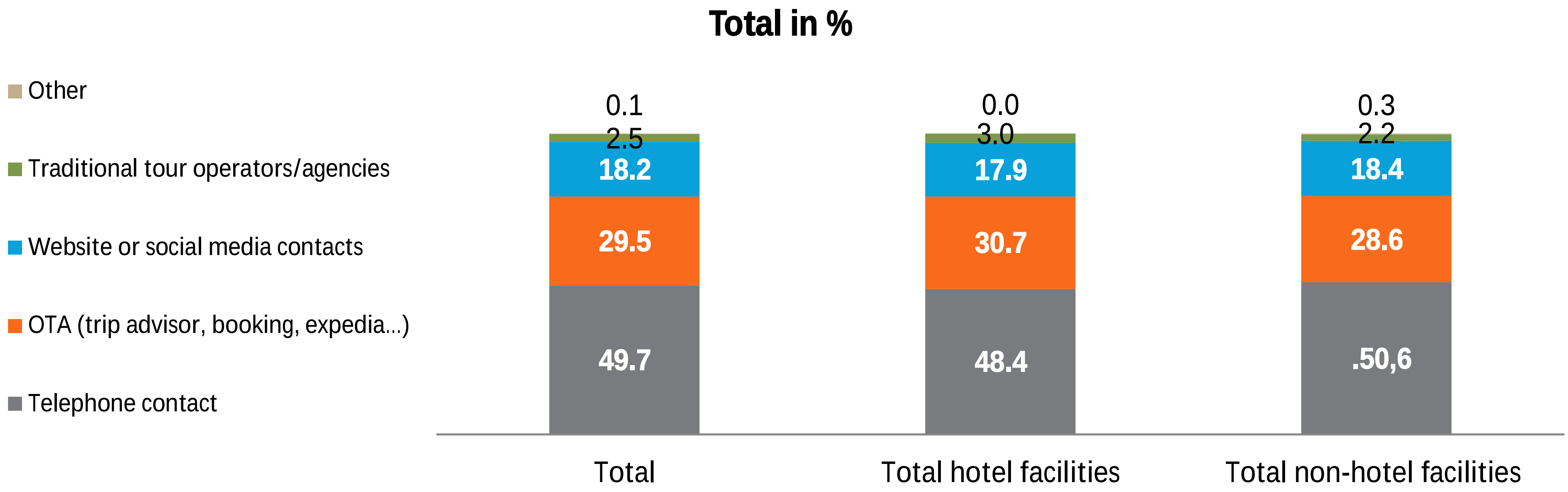


Base: facilities open that had guests in the month of December
Question with multiple answers

Channels used for December bookings

FIFTH WAVE

To date, with a total of 100 bookings for December, what % were made through the following booking channels?



Base: facilities open or about to reopen and receiving bookings

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2.
Forecasts for the coming months

a3 a4

Forecasts for the coming months

- To date, the structures say the booking numbers are around 26% for January, 15% for February and 13% for March-April of next year, with a preference for hotel facilities over non-hotel facilities. Of the hotels that say they are taking bookings, the percentage of occupation declared to date is around one quarter of their capacity, with no large differences between hotel and non-hotel facilities (with a peak of almost one third in the month of March).

- The bookings were made mostly through direct channels (especially for non-hotel facilities), followed by OTA and with the social media pages and websites in third place. Non-hotel facilities are aided a little more by internet.

- Couples and families continue to be the most likely to book in advance. This target shows an interesting preference for non-hotel facilities, in contrast to tourists and business travellers, who continue to show a slightly higher preference for hotel facilities.

- Most of these bookings (over 80%) come from Italy, and in particular from regions other than those in which the facilities are located, while guests from abroad are estimated to account for around 42% (46% for hotels and 36% for other types of tourist accommodation).

Diapositiva 16

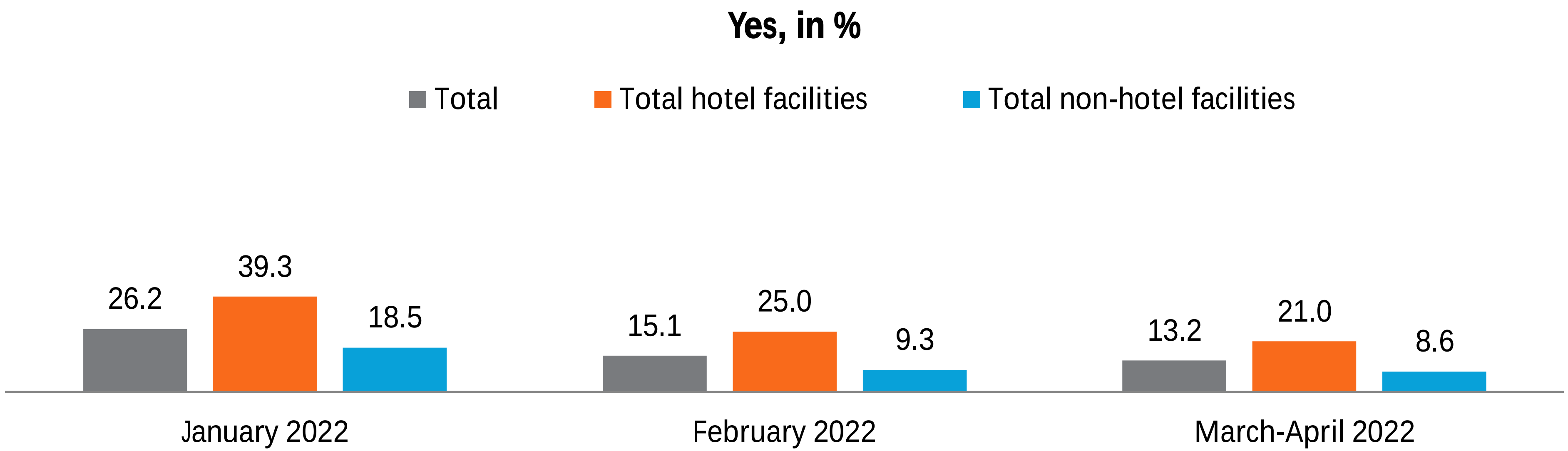
a3 prima dice che le strutture extra-alberghiere vengono contattate più spesso direttamente: intendono senza agenzie/tour operator, giusto?
ann-e; 20/01/2023

a4 ?? i conti non tornano
ann-e; 20/01/2023

Tourist accommodation bookings for the coming months

FIFTH WAVE

To date, does your facility already have bookings for..?



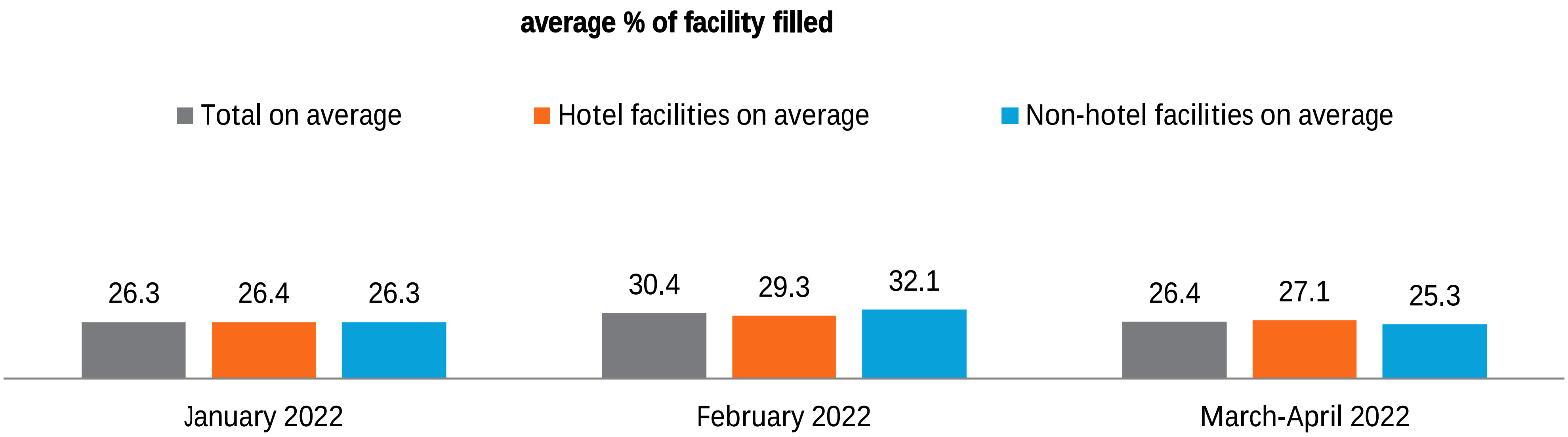
Base: facilities open or about to reopen and receiving bookings

AGENZIA NAZIONALE DEL TURISMO

Estimated occupation levels of tourist accommodation facilities in the coming months

FIFTH WAVE

What percentage of your facility has already been filled on average for …?



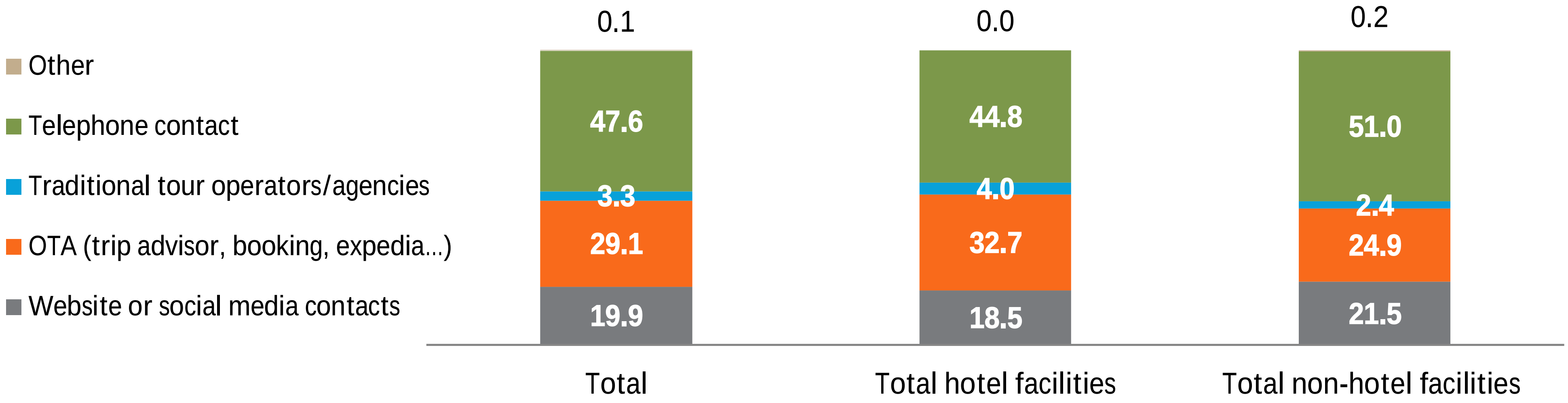
Base: facilities that say they are receiving bookings

Channels used for booking

FIFTH WAVE

To date, with a total of 100 bookings, what % were made through the following booking channels?

Total in %



Base: facilities open or about to reopen and receiving bookings

Type of guests that are booking for the coming months

FIFTH WAVE

For what type of guests are you currently receiving booking requests?

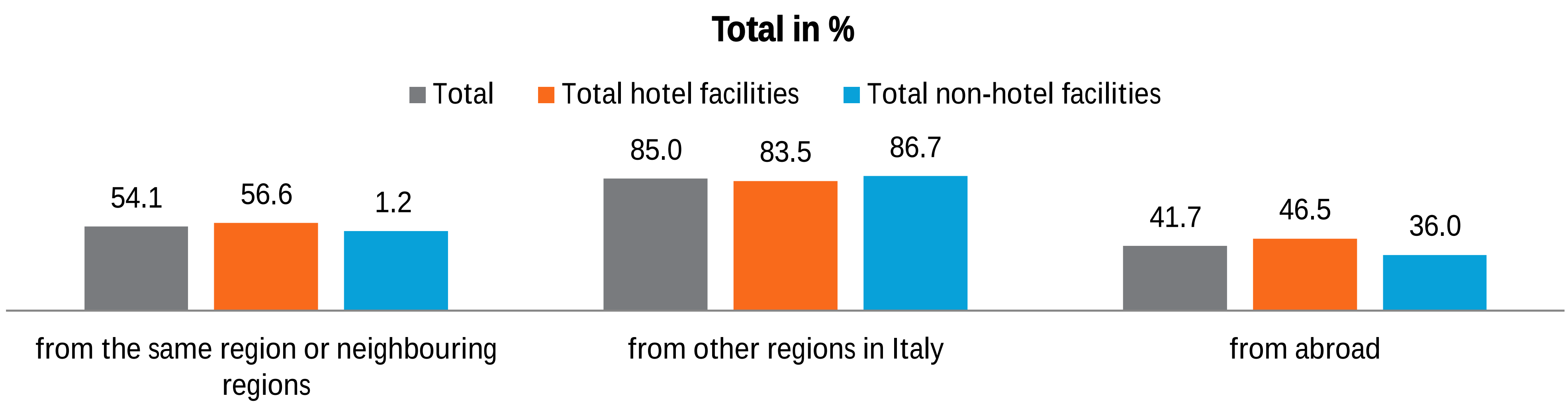
	Total in %	Total hotel facilities	Total non-hotel facilities
Couples/ families	67.0	64.7	69.7
Tourists/pleasure travellers	28.2	**29.9**	26.3
Business travellers	20.2	**23.7**	16.1
Individual travellers	17.7	**20.0**	15.1
Groups	8.5	9.4	7.4
Students/schools	1.7	2.1	1.1
Congress participants	1.4	2.3	0.4
Other	0.7	0.4	1.1
No opinion	0.6	0.8	0.2

Question with multiple answers
Base: facilities that say they are receiving bookings

Origin of bookings for the coming months

FIFTH WAVE

Where are most of your bookings coming from?



Base: facilities that say they are receiving bookings

3.
Sustainability and Inclusion: ENVIRONMENTAL IMPACT

Sustainability and Inclusion: ENVIRONMENTAL IMPACT

- The analysis regarding awareness of environmental impact on the part of the accommodation facilities interviewed shows that many have adopted practices both to recycle waste and reduce the use of plastic, with such practices “always” being implemented in an absolute majority of cases. With regard to reducing waste and saving water, an absolute majority of the facilities are making an effort, while progress is a little slower with regard to the use of renewable energies.

- A high frequency of virtuous behaviour is also evident from the absolute majority of facilities who say that they “encourage eco-friendly behaviours on the part of guests”, “use eco-compatible products”, “reduce laundry by re-using towels and sheets” and “select suppliers that respect the environment”. There is less attention paid to taking part in environmental conservation projects or activities in the surrounding area, indicating that for the moment, environmental awareness among facilities in the sector takes the form of individual rather than corporate responsibility.

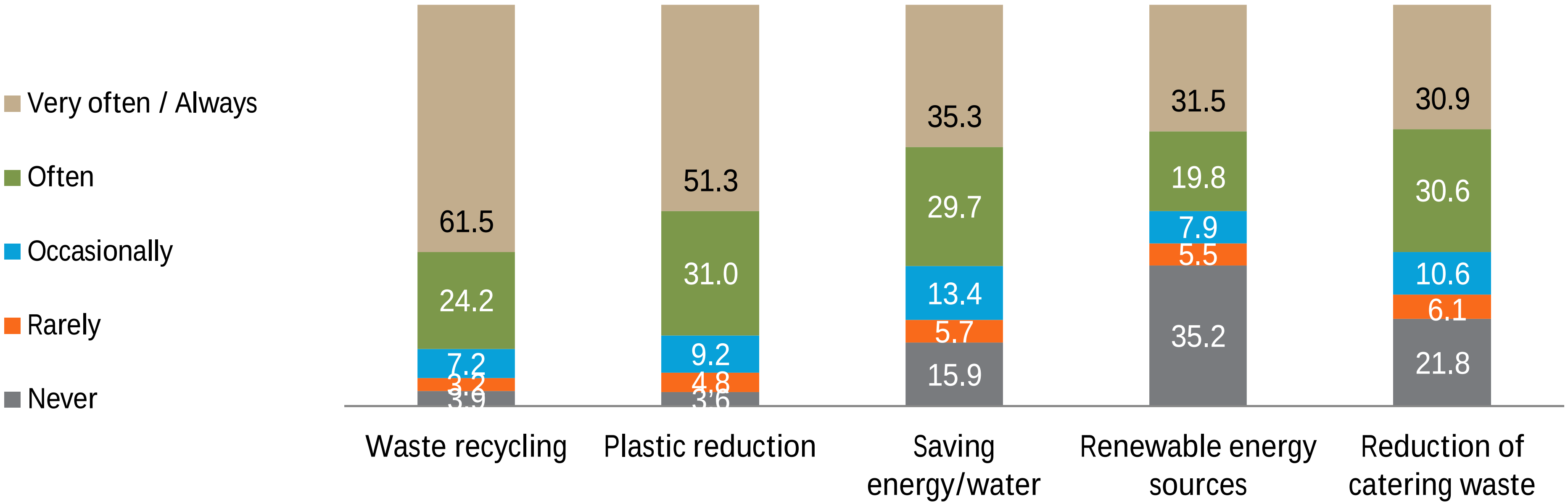
- In the last year, just 8% of the facilities organised courses on environmental performance and sustainability for their employees and/or collaborators; the figure was higher than average in hotels. Lack of time and motivation were the main reasons given by those who chose not to organise such courses.

- Being able to measure the environmental impact of their activity was, however, considered important by the absolute majority of the facilities interviewed, without significant differences between hotel and non-hotel facilities.

Attention to the environment /1

FIFTH WAVE

How frequently are the following processes and/or technologies adopted in your facility?

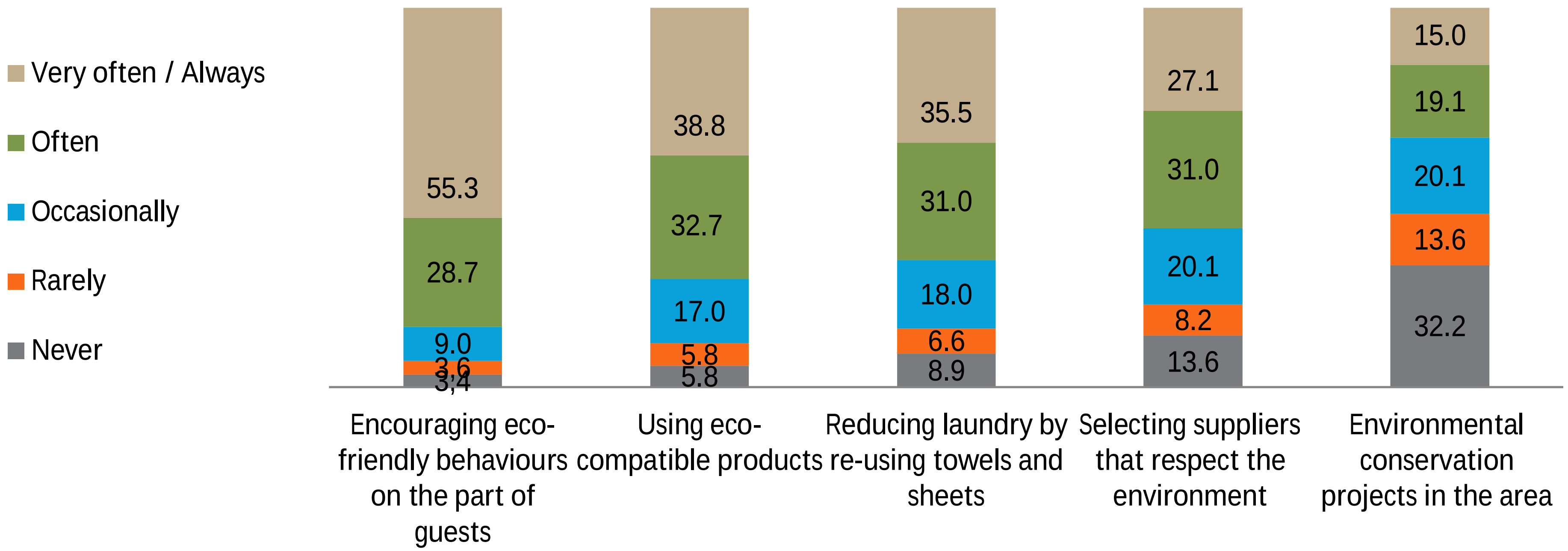


Base: facilities open or about to reopen and receiving bookings

Attention to the environment /2

FIFTH WAVE

How frequently are the following processes and/or technologies adopted in your facility?

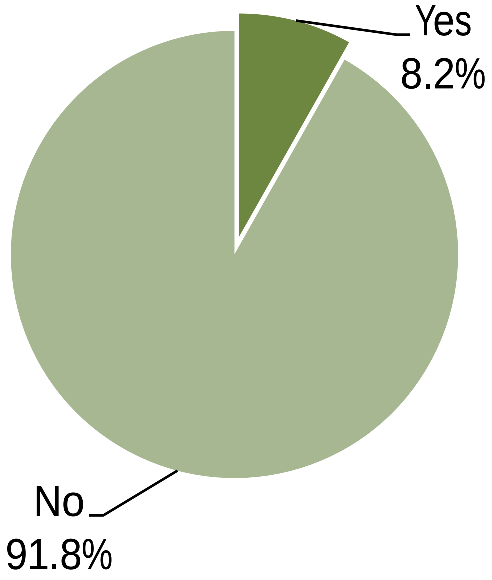


Base: facilities open or about to reopen

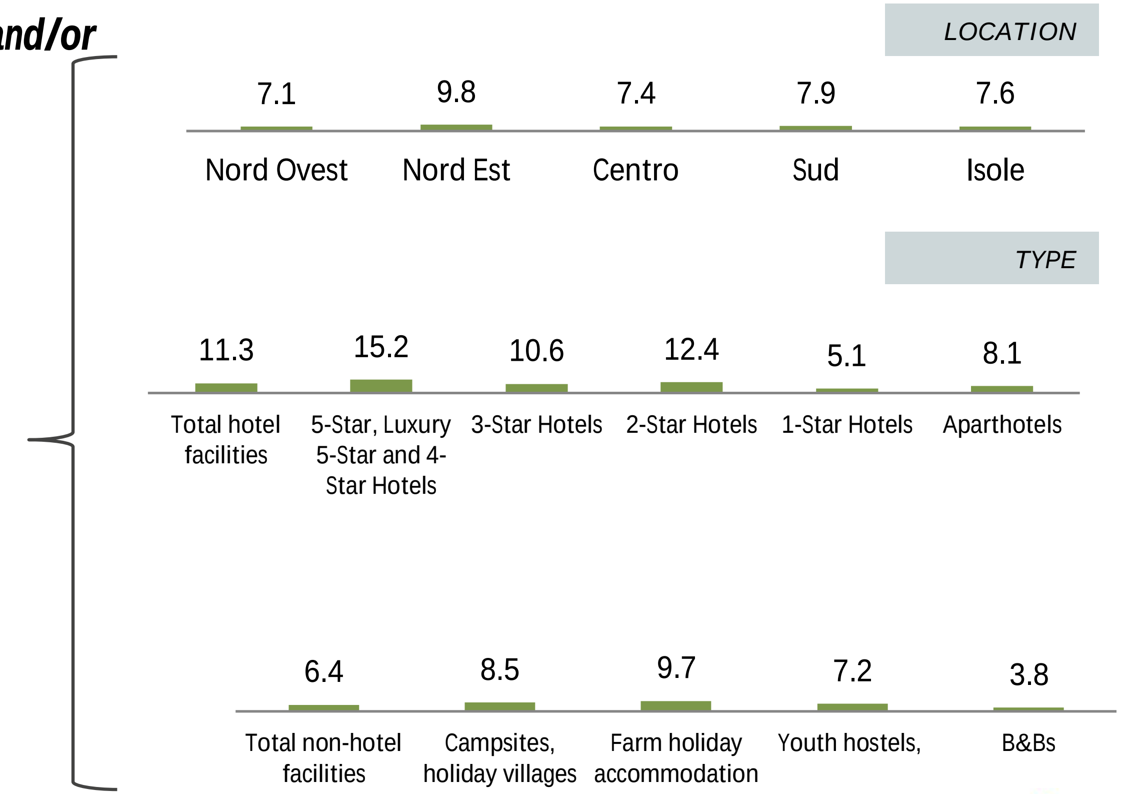
Facilities that have organised courses on environmental performance and sustainability

FIFTH WAVE

In the last year, has your business organised courses on environmental performance and sustainability for employees and/or collaborators?



% that have organised courses



Base: Facilities open or about to reopen

Reasons courses on environmental performance and sustainability have not been organised

FIFTH WAVE

Why has your business not organised courses on sustainability for employees and/or collaborators?

Base: facilities open or about to reopen that have not organised courses on sustainability
Question with multiple answers

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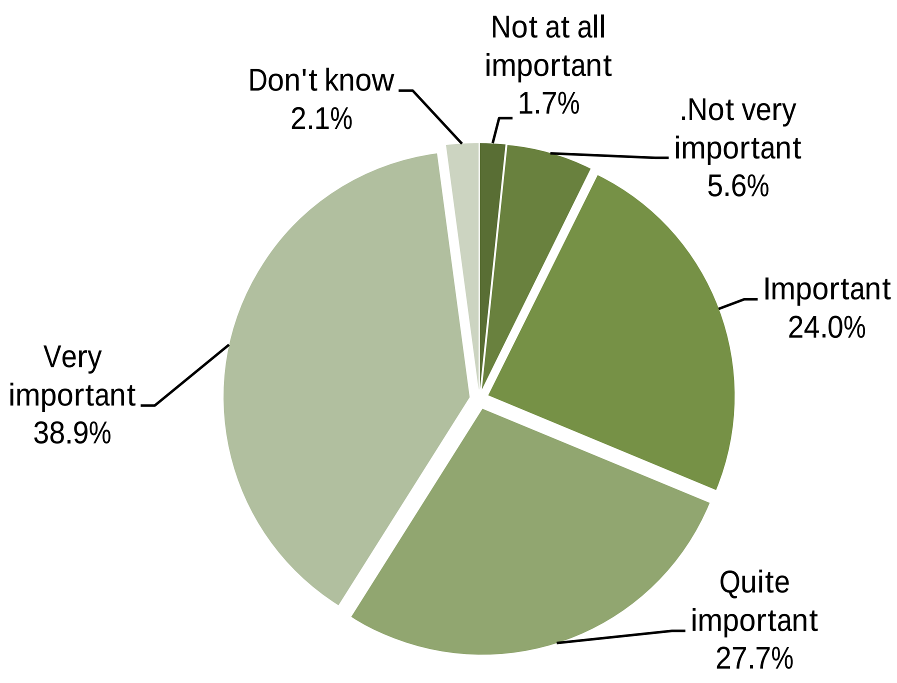
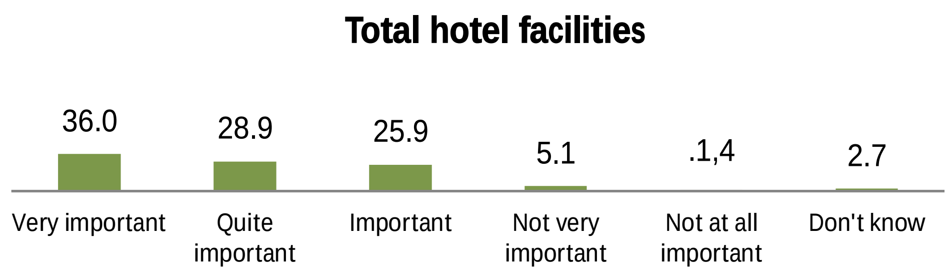
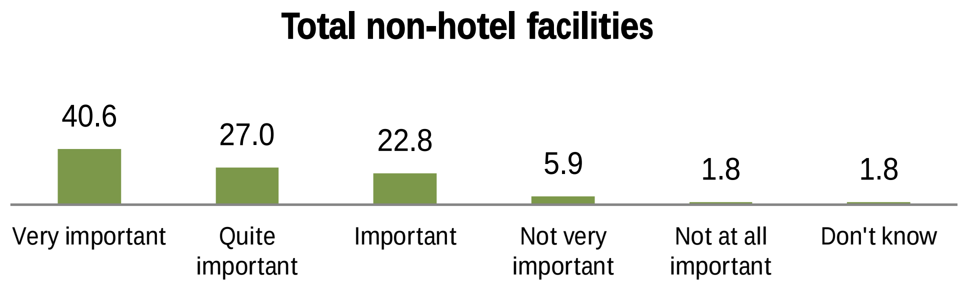
How important is it for facilities to be able to measure the environmental impact of their activity?

FIFTH WAVE

How important is it for your facility to be able to measure the environmental impact of your activity?







Base: Facilities open or about to reopen

4.
Sustainability and Inclusion: GREEN INVESTMENTS

Sustainability and Inclusion: GREEN INVESTMENTS

- **An absolute majority of the facilities interviewed believe it is important to invest in technologies to reduce pollution, with no significant differences between hotel and non-hotel facilities.**

- **High-energy-efficiency lighting systems and monitoring of consumption have been implemented by approx. 1/3 of the facilities interviewed, followed by heat regulation and window insulation, implemented by a little over 1 in 4 facilities.**

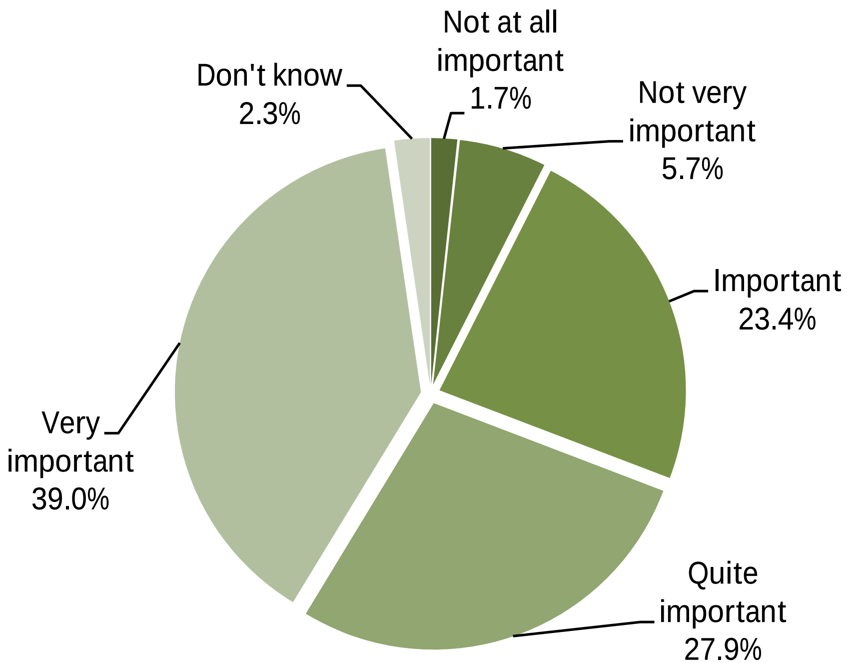
- **27% of the facilities interviewed are considering investing in technologies to reduce pollution in the future. This regards both hotel and non-hotel facilities, more of them (33%) located in the south than in the rest of Italy.**

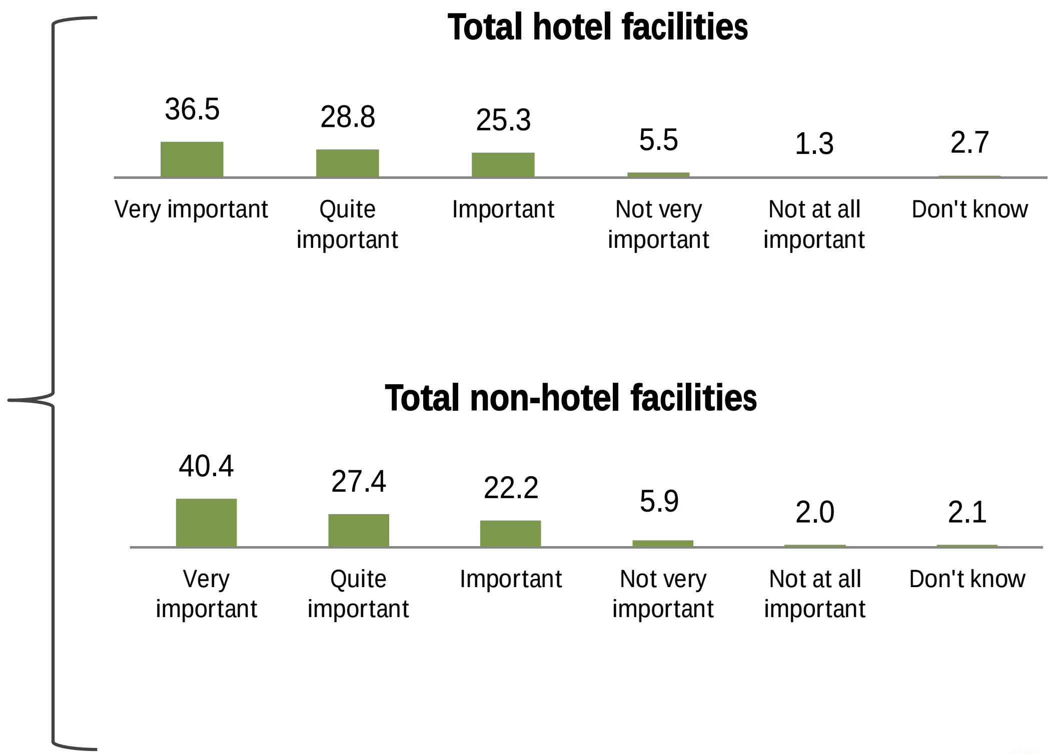
- **The cost is undoubtedly the main obstacle mentioned by those who do not intend to make this type of investments in the near future, but in addition to the financial difficulty, it is important to note the lack of information on opportunities, costs and benefits regarding technologies to reduce pollution, mentioned in around 20% of cases.**

How important is it for facilities to invest in technologies to reduce pollution?

FIFTH WAVE

How important is it for your facility to invest in technologies to reduce pollution?



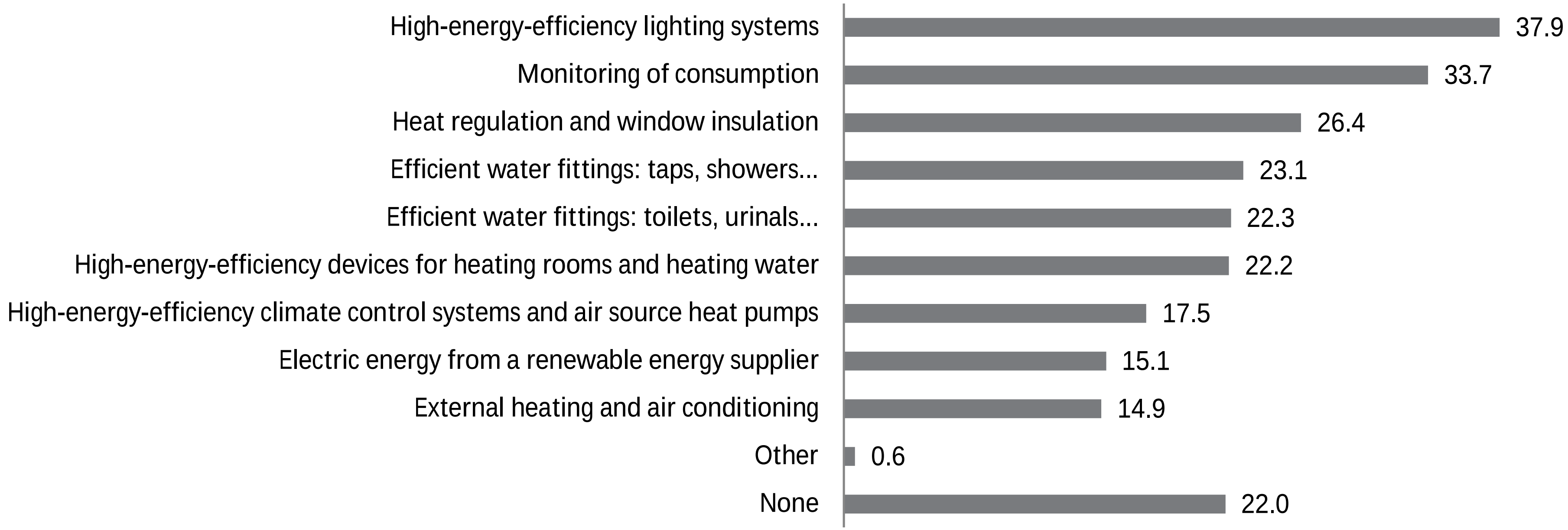


Base: Facilities open or about to reopen

Actions implemented to reduce pollution in recent years

FIFTH WAVE

What actions has your facility implemented to reduce pollution in recent years?

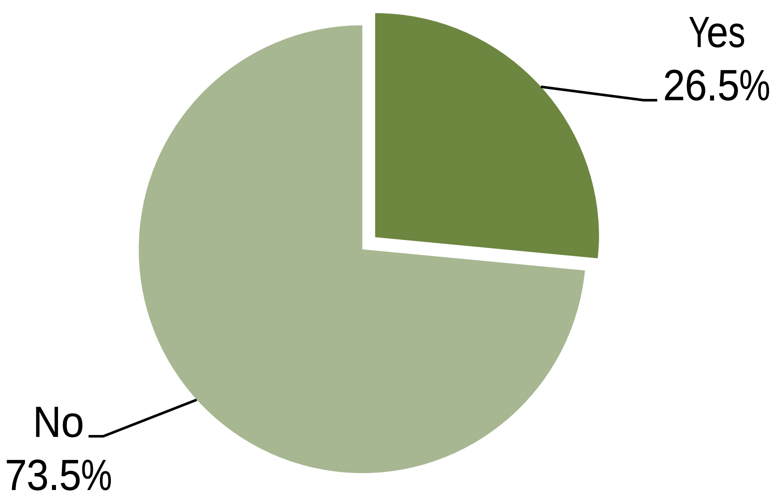


Base: facilities open or about to reopen
Question with multiple answers

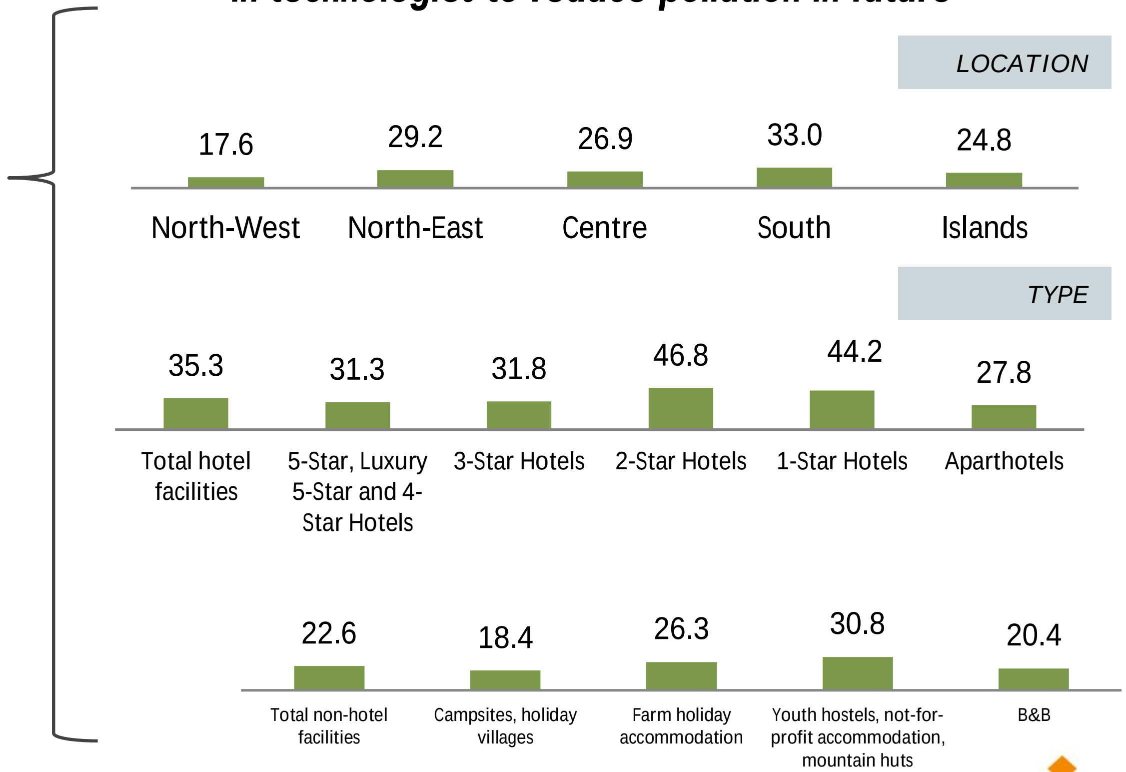
Investing in technologies to reduce pollution in the future

FIFTH WAVE

Is your company thinking of investing in technologies to reduce pollution in future?



% of facilities thinking of investing in technologies to reduce pollution in future

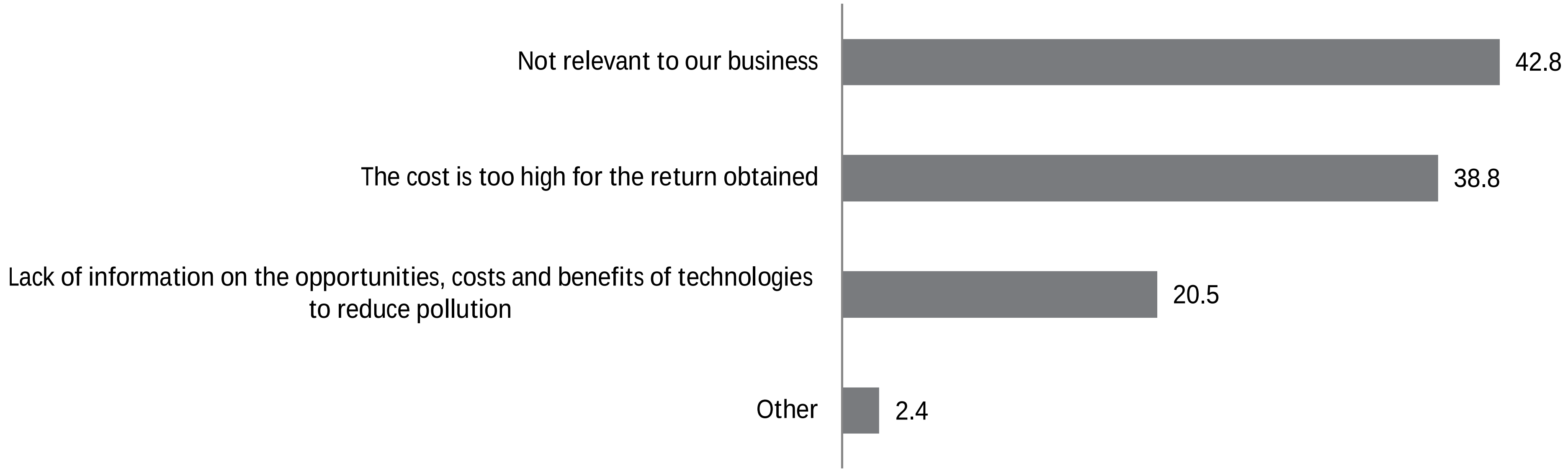


Base: Facilities open or about to reopen

Why are facilities not prepared to invest in technologies to reduce pollution?

FIFTH WAVE

Why is your facility not prepared to invest in technologies to reduce pollution?

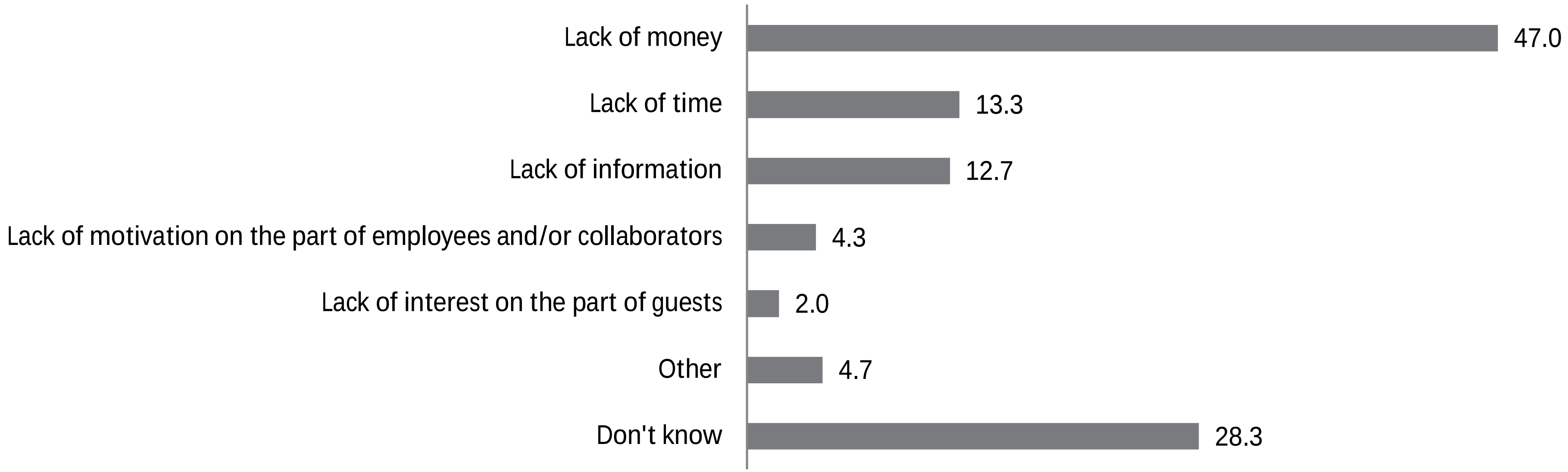


Base: facilities open or about to reopen that are not prepared to invest in technologies to reduce pollution
Question with multiple answers

The main obstacles to the implementation of technologies to reduce pollution

FIFTH WAVE

What are the main obstacles to the implementation of technologies to reduce pollution faced by your facility?



Base: facilities open or about to reopen that want to invest in technologies to reduce pollution
Question with multiple answers

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5.
Sustainability and Inclusion: GREEN CERTIFICATIONS

Sustainability and Inclusion:
GREEN CERTIFICATIONS

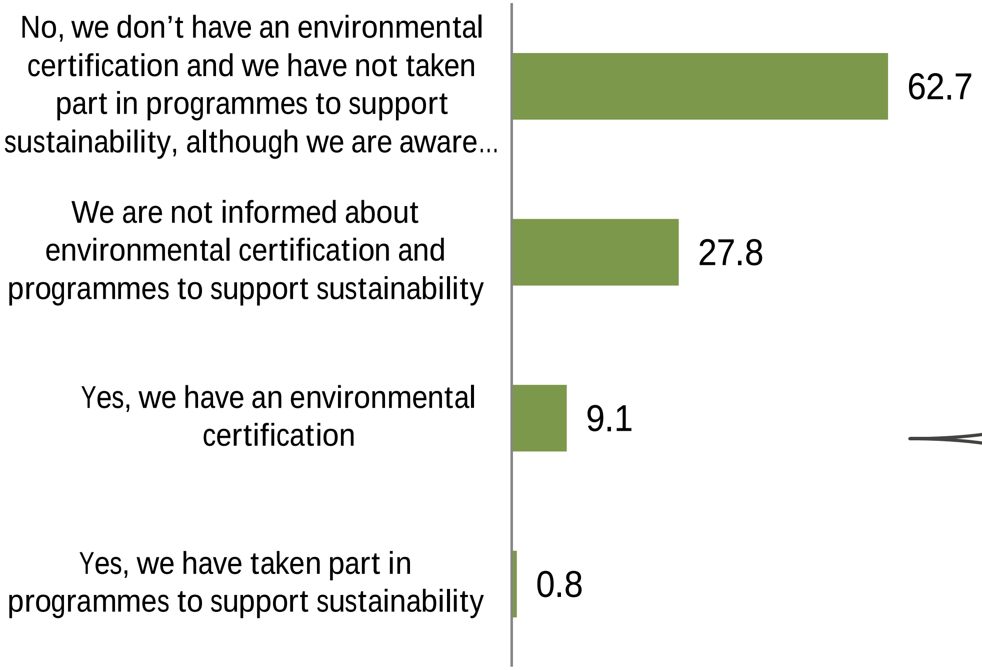
- **9% of the facilities interviewed have environmental certification, and these facilities are spread fairly evenly throughout the country. The percentage is obviously higher in the facilities such as 5-Star hotels, or in non-hotel facilities such as campsites and holiday villages.**

- **The most common certification is ISO 14001, mentioned by 12% of the facilities interviewed.**

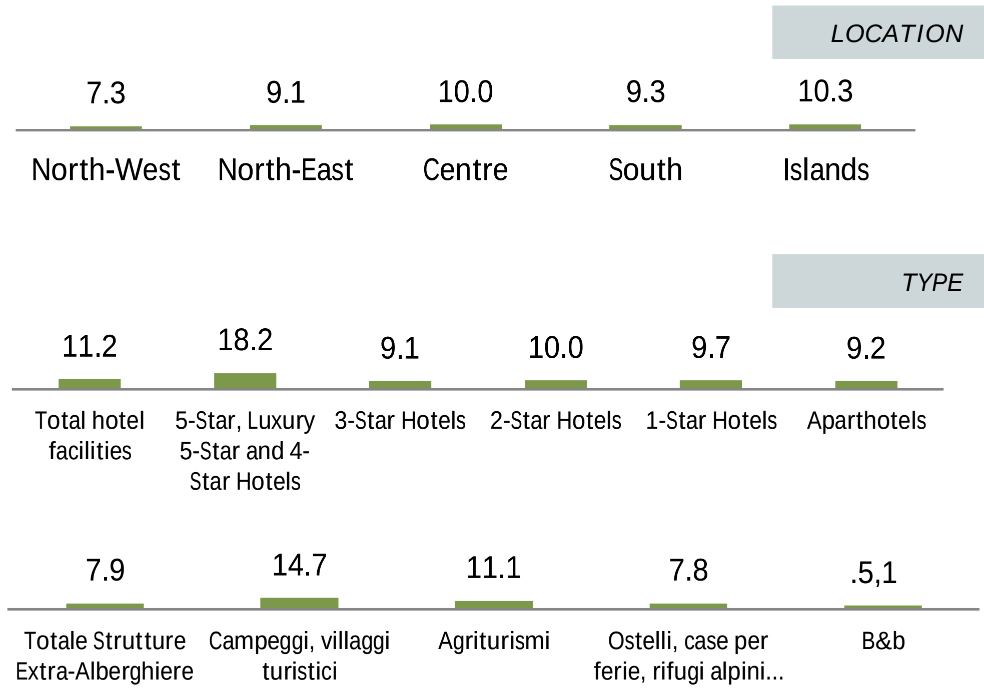
Environmental certification

FIFTH WAVE

Does your facility have an environmental certification or has it taken part in programmes to support sustainability?



% of companies that have environmental certification

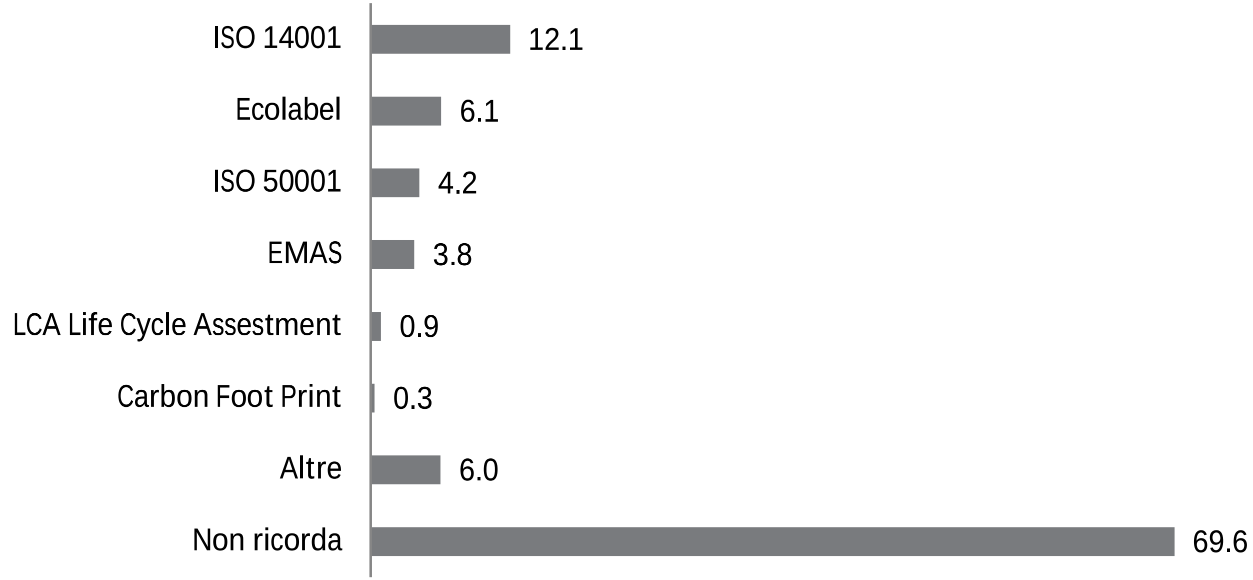


Base: Facilities open or about to reopen

Environmental certifications

FIFTH WAVE

Which environmental certifications does your facility have?



Base: facilities open or about to reopen that have an environmental certification
Question with multiple answers

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AGENZIA NAZIONALE DEL TURISMO

6.
Sustainability and Inclusion:
GREEN RELATIONSHIP WITH GUESTS

Sustainability and Inclusion:
GREEN RELATIONSHIP WITH GUESTS

- **A good level of engagement and interest is evident among the facilities interviewed with regard to their green relationship with guests.**

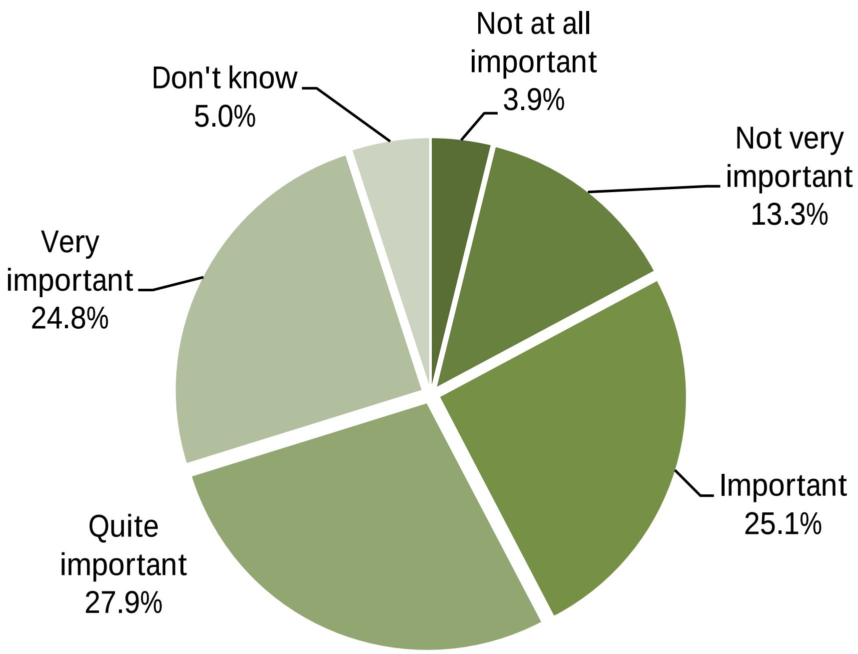
- **In an absolute majority of cases, facilities placed importance on including eco-sustainable practices in the tourist experience offered to guests. Over 60% of the tourist facilities interviewed encourage guests to consume local produce.**

- **Food is therefore the area in which the facilities interviewed adopted the most proactive approach, followed by asking guests to pay attention to waste, encouraging them to reduce the amount produced, also in order to avoid wasting resources.**

How important is it for guests to have eco-sustainable practices included in their tourist experience?

FIFTH WAVE

In your opinion, how important is it for your guests to have eco-sustainable practices included in their tourist experience?



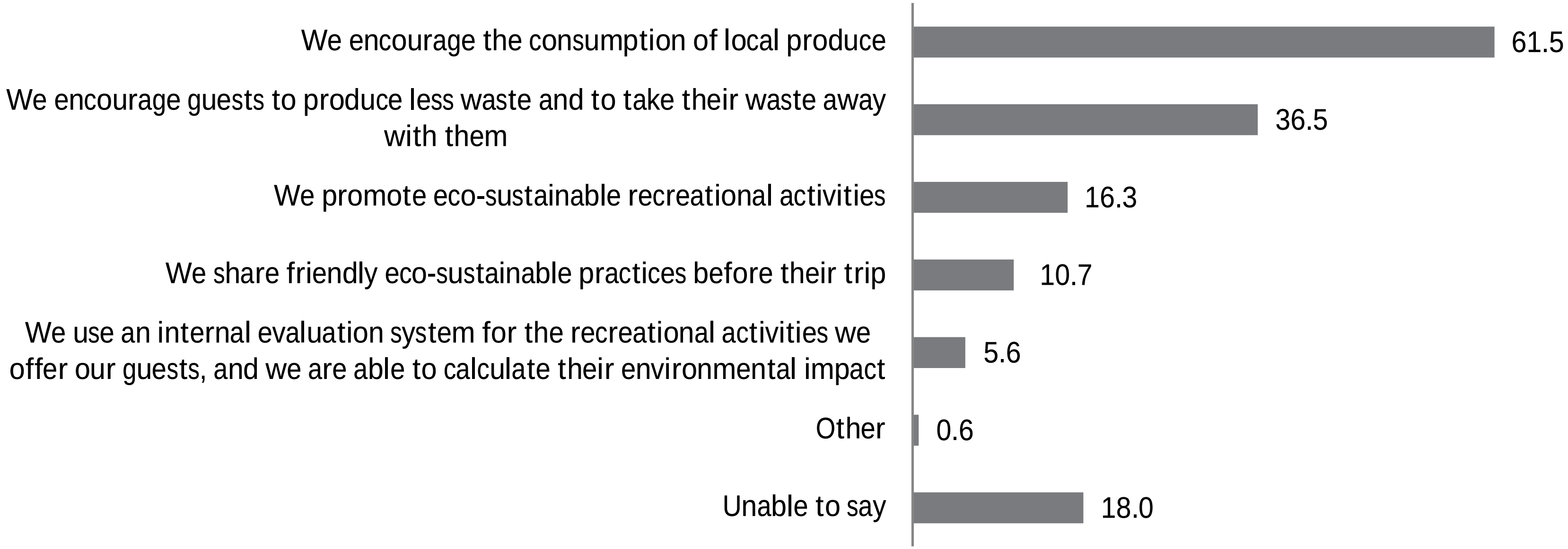
Base: Facilities open or about to reopen

AGENZIA NAZIONALE DEL TURISMO

Raising guests' awareness of their environmental impact

FIFTH WAVE

What do you do to raise your guests' awareness of their environmental impact?



Base: facilities open or about to reopen
Question with multiple answers

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7.
Sustainability and Inclusion: ECO-SUSTAINABLE PRACTICES

Sustainability and Inclusion:
ECO-SUSTAINABLE PRACTICES

- **With regard to mobility, guests are offered transport services in 22% of cases These mostly regard cars for personal use, mentioned in 38% of cases, but bicycles are also among the services most frequently mentioned (28%). With regard to offering eco-sustainable mobility solutions for guests, 55% said they were not interested, while 32% were prepared to offer this option - mostly hotel rather than non-hotel facilities.**

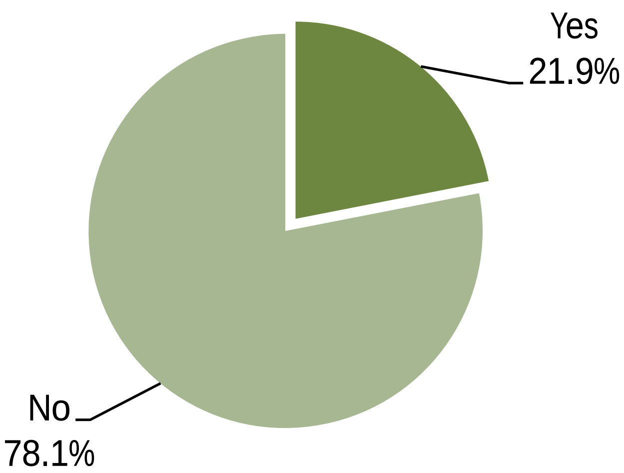
- **With regard to ecological recreational activities, hiking or trekking routes that respect the environment and the local community were the most common in the area the facilities are located in. This type of activity was mentioned by an absolute majority of those interviewed, followed by cultural and historical itineraries that respect the environment and the local community.**

- **Eco-compatibility is considered extremely important by the facilities, also when it comes to suppliers: for more than 50%, it is important that suppliers comply with eco-compatibility standards and criteria. This concept goes hand in hand with making the most of the local area and its resources. Choosing local suppliers is an aspect on which the absolute majority of the facilities place the utmost importance.**

Transport services offered to guests

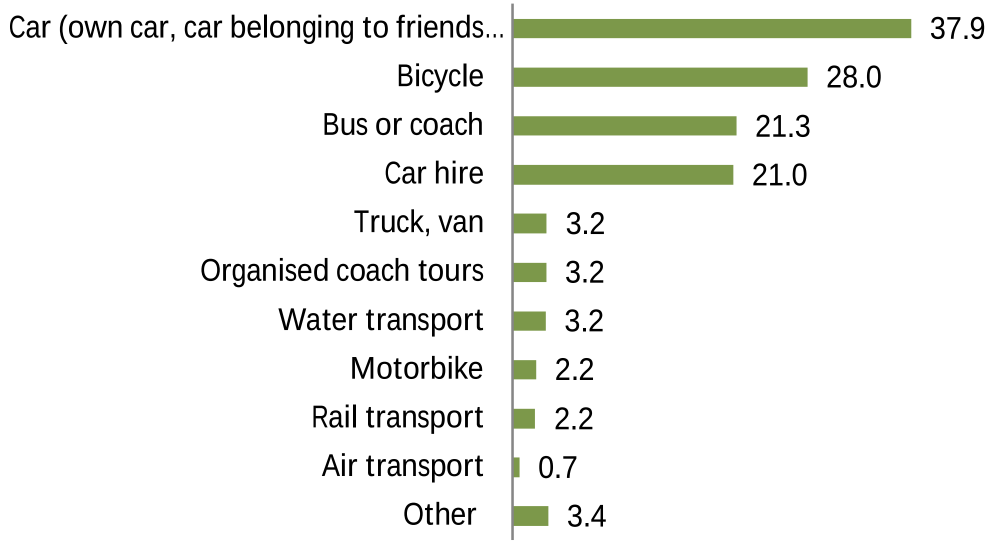
FIFTH WAVE

Do you offer transport services to your guests?



Base: Facilities open or about to reopen

What type of transport service do you provide for getting around the destination?

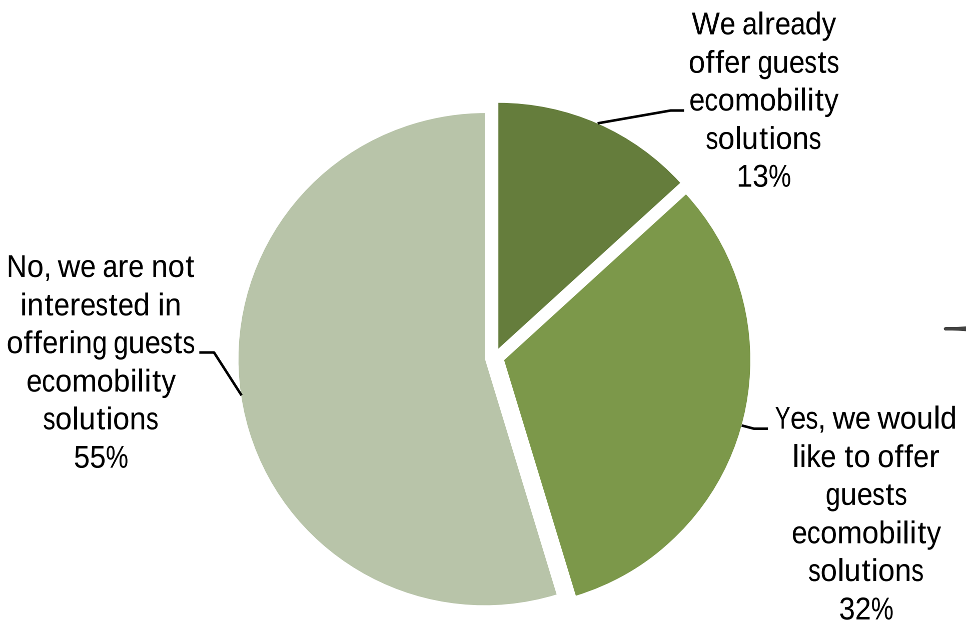


Base: facilities open or about to reopen that offer transport services
Question with multiple answers

Ecomobility

FIFTH WAVE

Would your facility consider the idea of offering guests ecomobility solutions, or raising awareness of them?

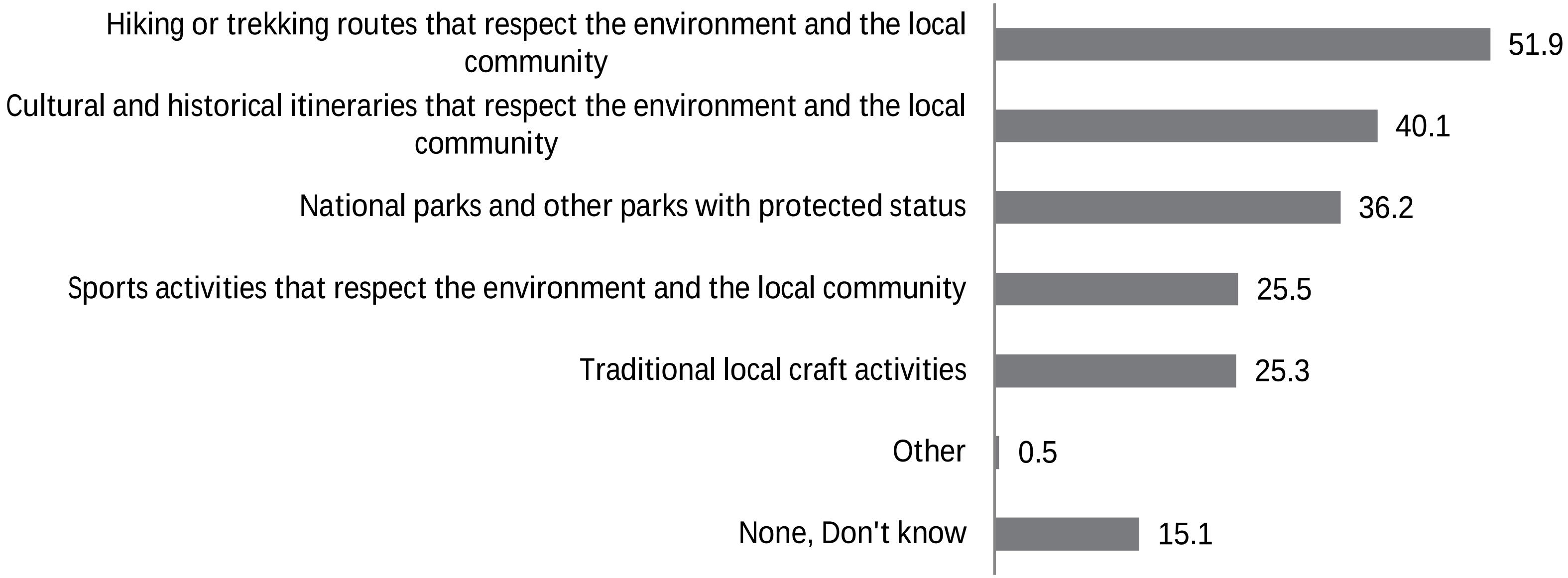


Base: Facilities open or about to reopen

Ecological recreational activities

FIFTH WAVE

What kind of ecological recreational activities are available in the area where your facility is located?

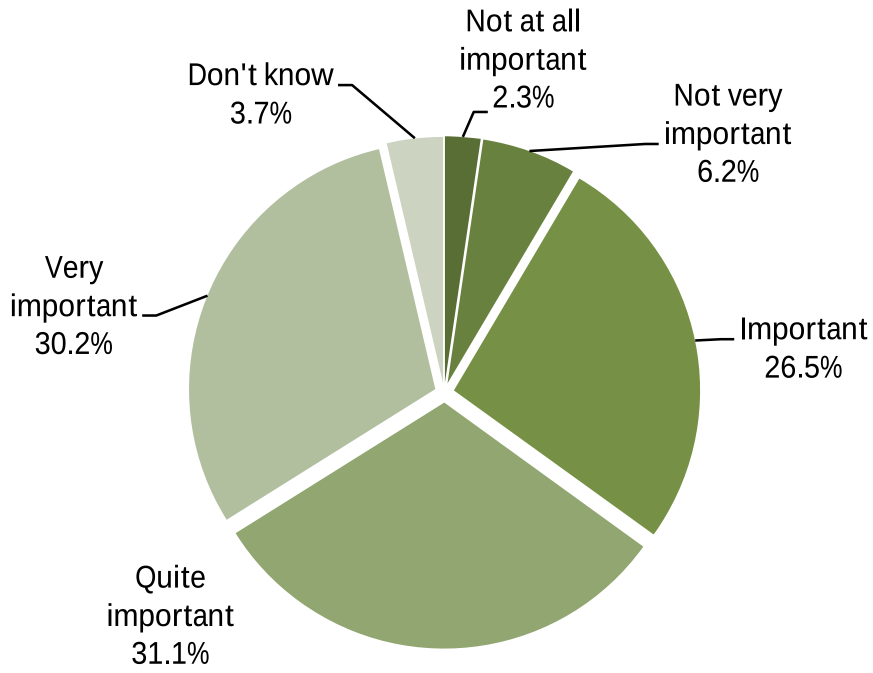


Base: facilities open or about to reopen
Question with multiple answers

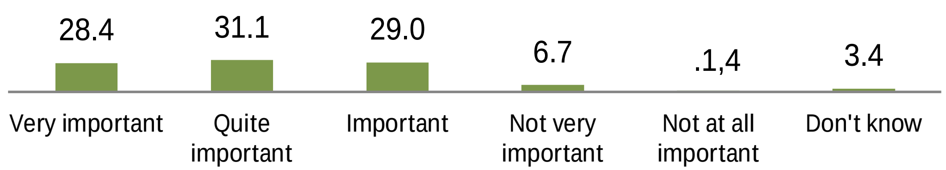
How important is it that suppliers comply with eco-compatibility standards and criteria?

FIFTH WAVE

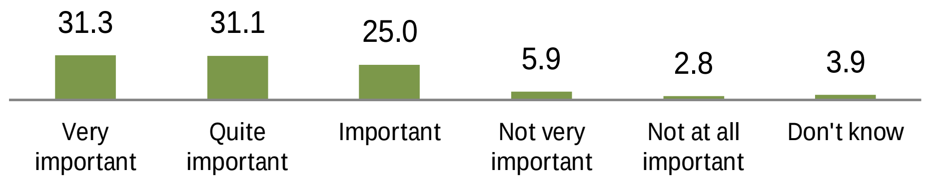
How important is it that your suppliers comply with eco-compatibility standards and criteria?



Total hotel facilities



Total non-hotel facilities



Base: Facilities open or about to reopen

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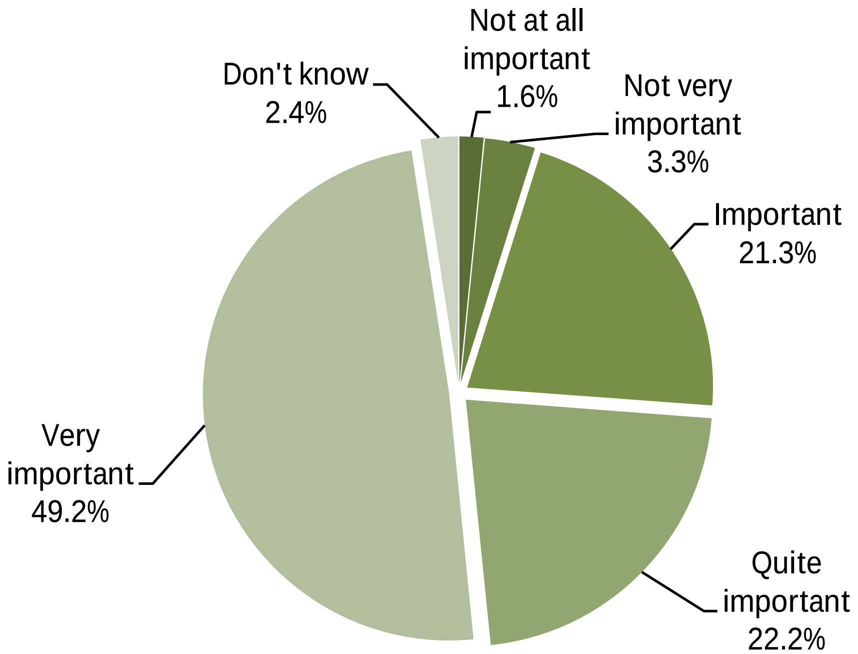
How important is it for facilities to choose a local supplier?

FIFTH WAVE

How important is it for your facility to choose a local supplier?



Base: Facilities open or about to reopen

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8.
Sustainability and Inclusion:
ECO-SUSTAINABLE CHALLENGES TO FACE FOR THE FUTURE

Sustainability and Inclusion:
ECO-SUSTAINABLE CHALLENGES FOR THE FUTURE

- **In conclusion, it emerged that the most urgent intervention required for the facilities to rise to eco-sustainable challenges regards a number of areas, on which similar importance was placed.**

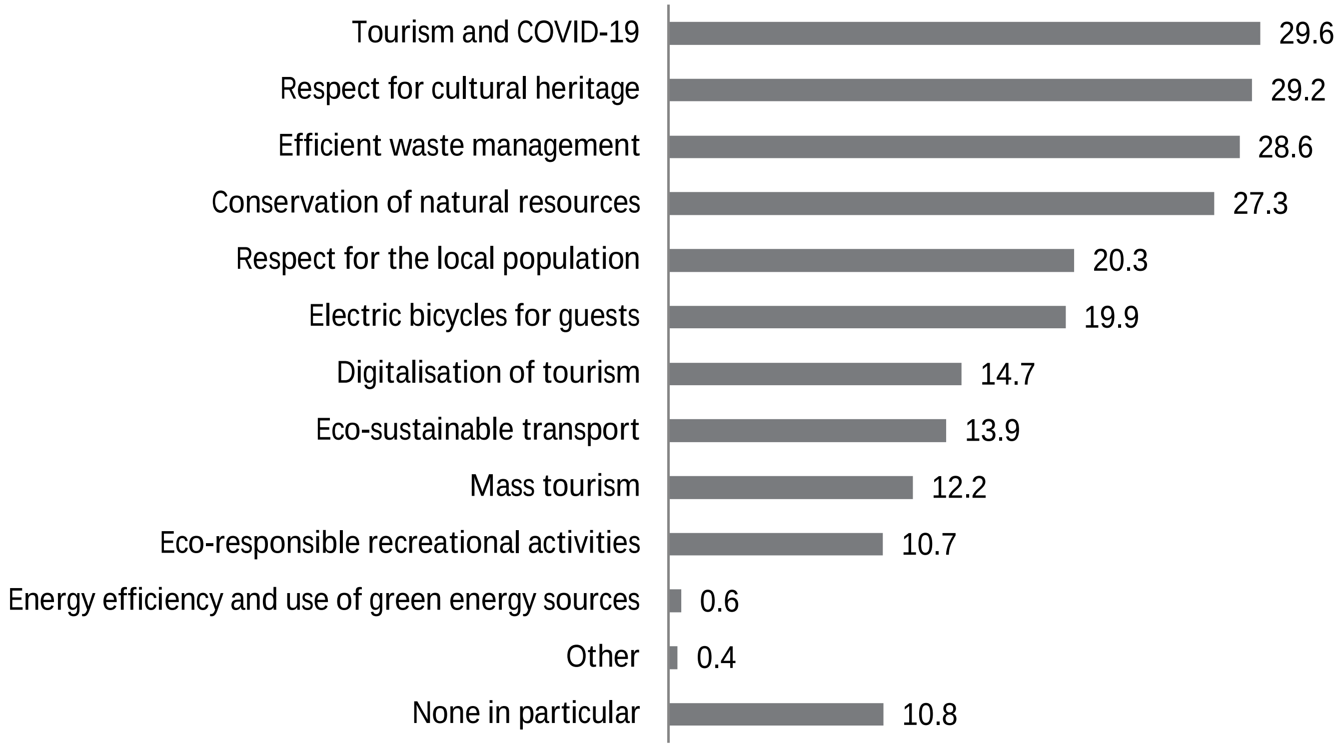
- **In addition to the health emergency and its impact on the situation of the entire sector, Italy's heritage was mentioned: not only the country's artistic heritage, but also its environmental and cultural heritage, for which it is considered urgent to devote attention and respect.**

- **Operators in the sector believe it is also urgent to take action on the issue of efficient waste management, as well as the issue of mobility, with importance placed on investing in electric vehicles, in particular electric bicycles to be made available to guests. Around 20% of operators in the sector believe this is a priority to invest in.**

Eco-sustainable challenges to face the future

FIFTH WAVE

What are the most urgent eco-sustainable challenges facing your facility?



Base: facilities open or about to reopen
Question with multiple answers

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