TOURISM DEMAND IN ITALY

Post-Easter 2022 survey

May 2022

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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

5 – 14 MAY 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	52.3	50.8	49.9	49.4	48.2	47.4	40.3
	Female	47.7	49.2	50.1	50.6	51.8	52.6	59.7

		Regions									
		Abruzzo	Basilicata	Calabria	Campania	Emilia-Romagna	Friuli-Venezia Giulia	Lazio	Liguria	Lombardy	Marche
Degree of urbanisation*	High	14.3	21.9	17.0	56.1	38.5	29.6	51.5	47.2	43.1	12.6
	Medium	54.5	28.1	47.3	31.6	41.6	43.7	38.2	42.7	47.0	63.2
	Low	31.2	50.0	35.7	12.2	19.8	26.8	10.4	10.1	9.9	24.1
		Regions									
		Molise	Piedmont	Puglia	Sardinia	Sicily	Tuscany	Trentino-Alto Adige	Umbria	Valle d'Aosta	Veneto
	High	16.7	26.8	34.8	17.0	32.9	28.7	20.3	30.2	0.0	18.9
	Medium	27.8	48.4	60.5	50.0	57.0	51.9	35.9	39.6	50.0	64.0
	Low	55.6	24.8	4.7	33.0	10.1	19.4	43.8	30.2	50.0	17.1

*Based on the DEGURBA classification: Cities (densely populated areas) - High; Towns and suburbs (intermediate density areas) - Medium; Rural areas (thinly populated areas) - Low

Sample profile

Total Interviews 3500

STUDY DOMAINS

Generation (year of birth)	
Gen Z (after 1995)	10.4
Millennials (1981 - 1995)	18.6
Gen X (1966 - 1980)	30.0
Baby Boomers (1946 - 1965)	28.7
Veterans (before 1946)	12.3
Total	100.0

Level of education	
Primary	17.0
Lower secondary	51.6
Upper secondary	27.4
Tertiary	4.0
Total	100.0

Professional condition	
Executive/entrepreneur	1.3
Middle management	1.3
White collar	31.9
Blue collar	10.9
Freelance professional	3.7
Self-employed	4.0
Student	4.7
Home-maker	12.4
Retired	24.9
Unemployed	4.8
Other	0.2
Total	100.0

Family composition	
1	9.1
2	41.2
3	23.9
4+	25.9
Total	100.0

Economic status*	
Low	56.7
Medium	29.9
High	13.4
Total	100.0

Type of traveller*	
Non-traveller	26.4
Occasional	50.6
Frequent	23.0
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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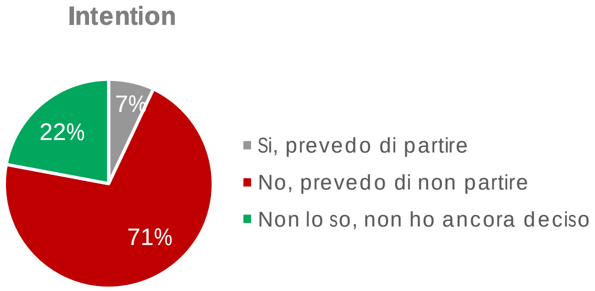
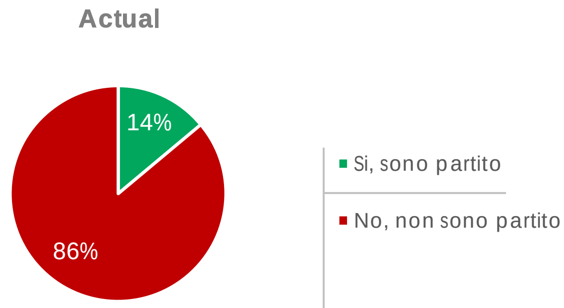
Spring season: Holidaymakers

Slight recovery in spring tourism demand

Do you plan to go / did you go on holiday in April/May? Consider both day trips (no overnight stay) and holidays with overnight stays





Base: Total Sample (3500 interviews)

Holidaymaker identikit (%)

(Spring season - Actual data on total sample)

Total Sample	13.9

Geographical Area	
North-West	15.0
North-East	**18.2**
Centre	14.1
South	10.9
Islands	10.0

Generation	
Gen Z	10.4
Millennials	18.6
Gen X	**30.0**
Baby Boomers	28.7
Veterans	12.3

Traveller classification	
Non-traveller	4.3
Occasional	11.1
Frequent	**31.2**

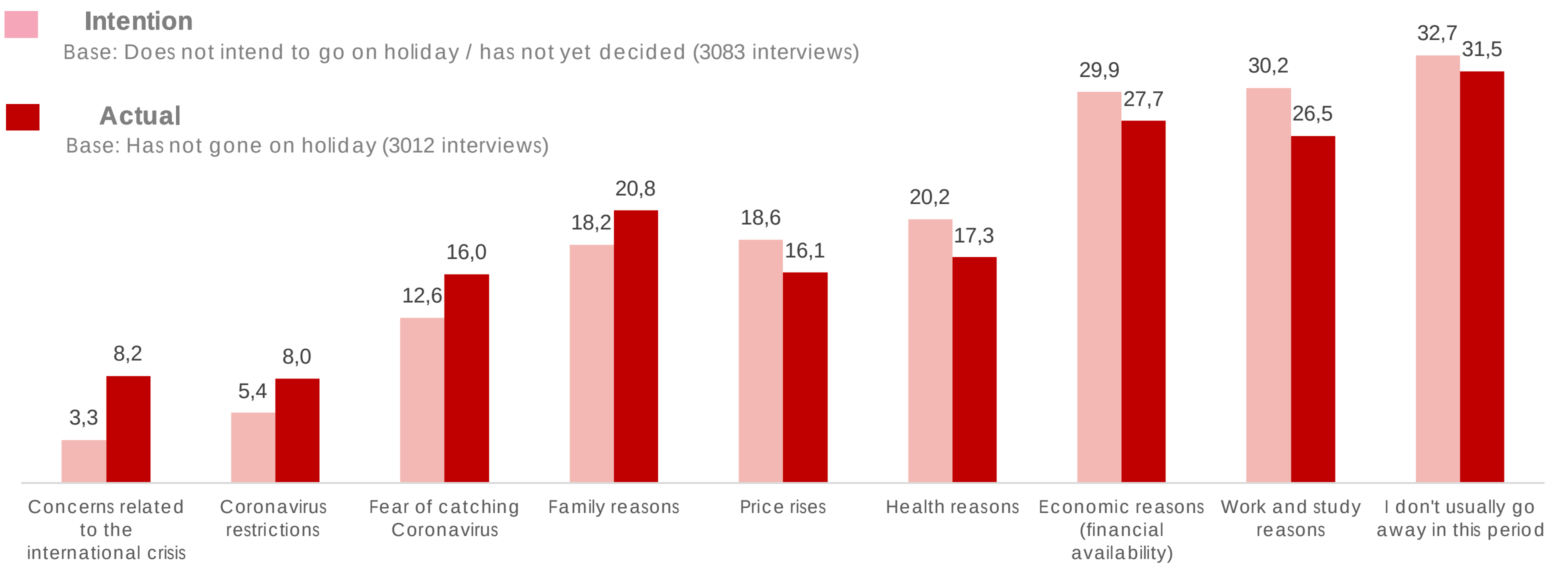
Economic status	
Low	8.8
Medium	17.5
High	**27.7**

Base: Total Sample (3500 interviews)

Spring season: Holidaymakers

Habits, commitments and economic difficulties have held back holiday demand

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



Spring season: Destination

Italy plays a key role in spring holidays

Can you tell me the exact destination? (%)

	Abroad	Italy
Intention Easter Base: respondents who intend to go on holiday (417 interviews)	16%	86%
	9%	91%

79% Region other than region of residence

21% Same region as region of residence

Actual data for Easter

Base: respondents who went on holiday (488 interviews)

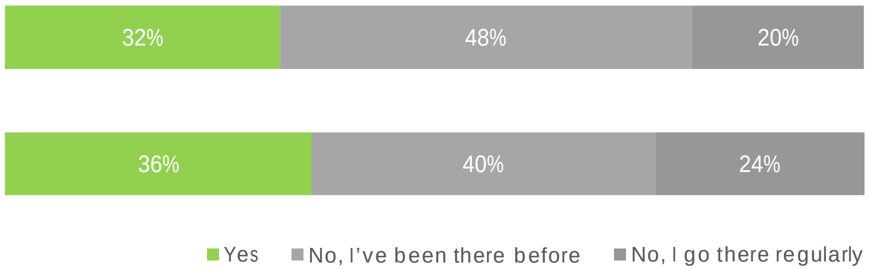
Top 4 Regions visited

Experiments can wait

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

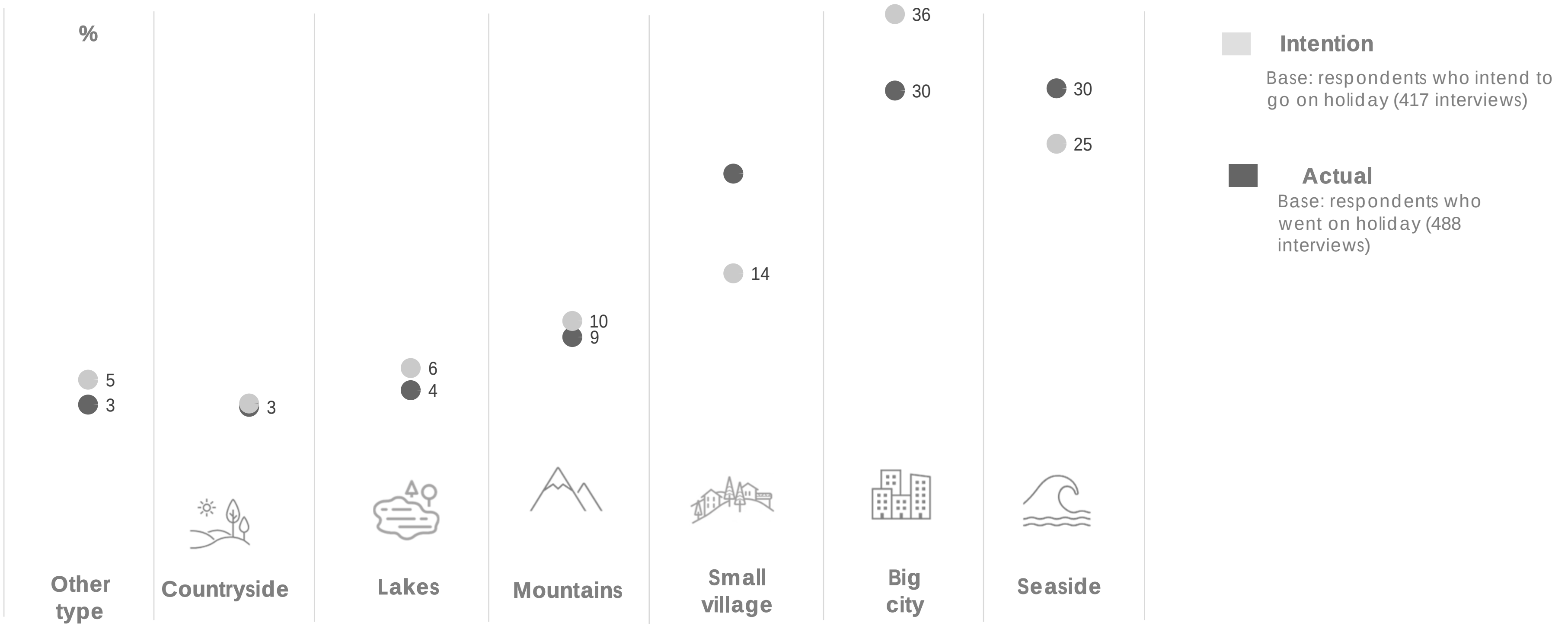
Intention
Base: respondents who intend to go on holiday (417 interviews)

Actual
Base: respondents who went on holiday (488 interviews)



Spring season: Destination

In spring, seaside destinations have the same appeal as big cities
Where do you intend to go / did you go?



Base: respondents who went on holiday (488 interviews)

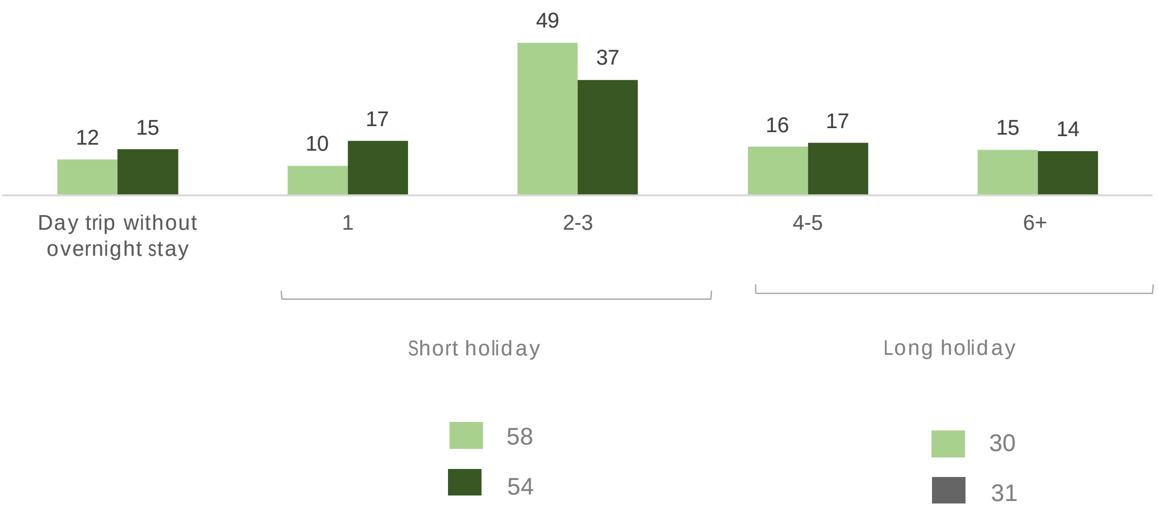
Spring season: Logistics

Intention
Base: respondents who intend to go on holiday (417 interviews)

Actual
Base: respondents who went on holiday (488 interviews)

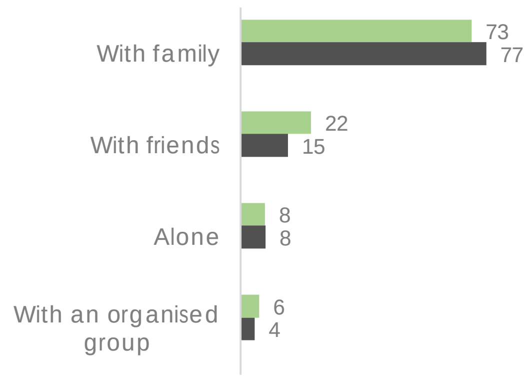
Spring is the season for brief holidays

How long will/did your holiday last, considering the number of nights away?(%)



Most Easter holidays spent with family

Will you/did you travel alone or with other people? (%)



Base: respondents who went on holiday (488 interviews)

Spring season: Logistics

Popularity of traditional and low-budget accommodation solutions confirmed

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

%	Intention Base: respondents who intend to go on holiday with overnight stay/s (229 interviews)	Actual Base: Went on holiday with overnight stay/s (279 interviews)	
Albergo/Motel/Pensione	43	47	4
Abitazione o stanza presso amici/parenti gratuita	8	14	6
Abitazione in affitto	5	9	4
Abitazione di proprietà o multi proprietà	11	8	-3
Bed&Breakfast	12	8	-4
Villaggio vacanza	3	3	0
Campeggio	5	2	-3
Agriturismo	4	1	-3

Base: respondents who went on holiday (488 interviews)

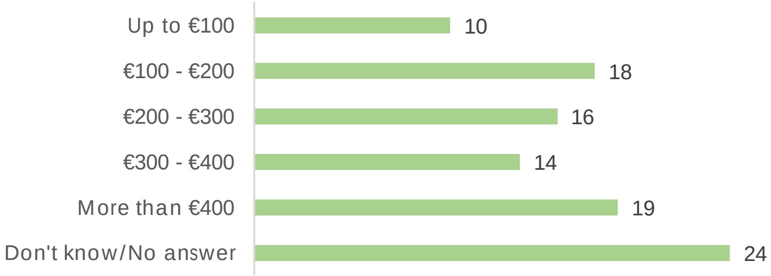
Spring season : Logistics

.. Limited budget, inferior to expectations

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

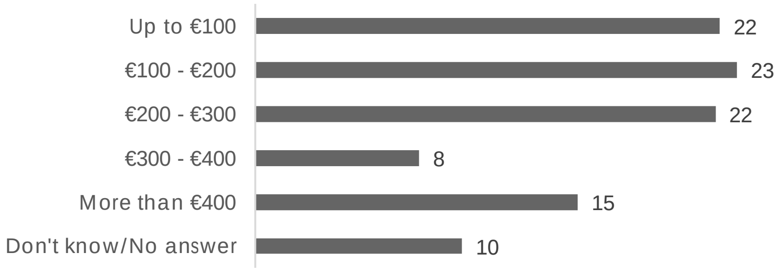
Intention

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



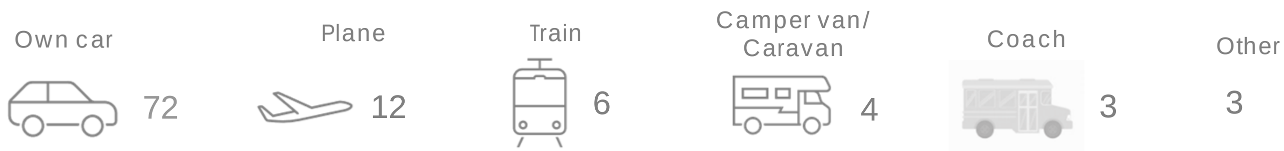
Actual

Base: respondents who went on holiday (339 interviews)



Destinations, duration and budget make car travel a popular option

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



Base: Respondents who went on holiday (488 interviews)

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Holiday expectations

The desire to leave the winter behind boosts the appeal of outdoor experiences, in contact with nature, in the company of loved ones, in safe situations

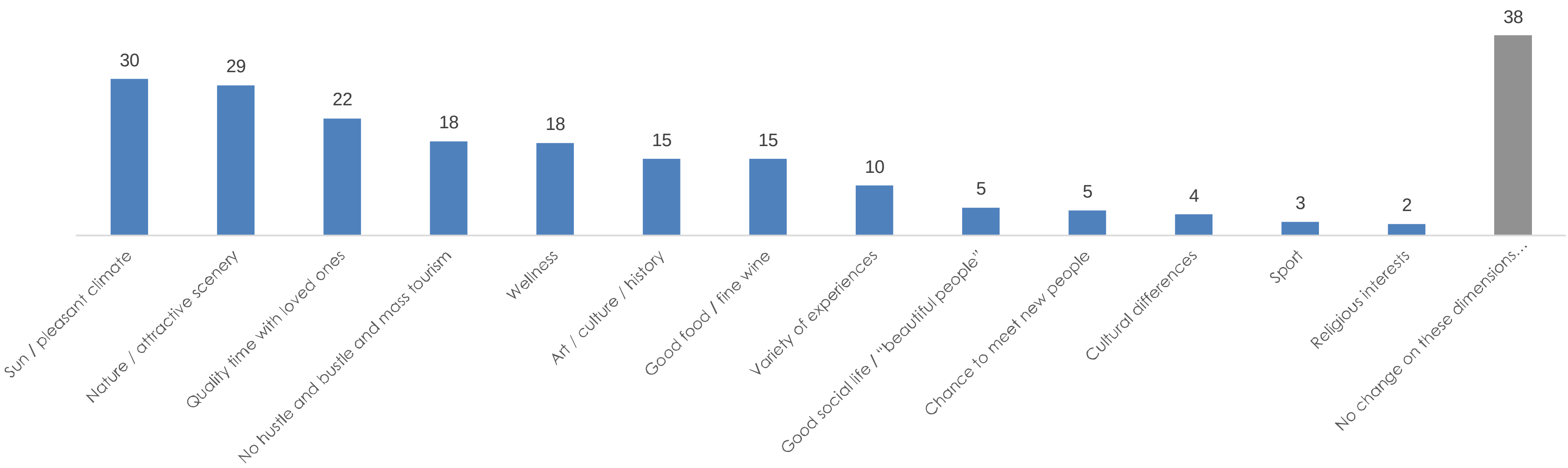
Which destination do you intend to / did you visit ( )

Base: Total Sample (3500 interviews)

Holiday expectations: change compared to the past

Seeking sunshine, a pleasant climate and nature have become the antidotes to combat the restrictions of the past and the worries of the present

Apart from the safety measures that have restricted our travels in the last two years, have you noted any changes in how you travel compared to the past? Specifically, which of these dimensions is more important to you today than in the past? ( )



Base: Total Sample (3500 interviews)

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Slow tourism: Experience

One in four Italians have had at least one experience of slow tourism. Experiences of slow tourism rise to one in three among Millennials and Gen X, and one in two among frequent travellers, in particular in the segments with the highest level of education

Have you had one or more of the following slow tourism experiences during the last year? (%)

Other	Religious routes	Scenic railways	Historical railways	Camper van trips	Food and wine tourism	Ways	Trekking	No slow tourism experience
2%	2%	2%	2%	2%	5%	6%	7%	73%

27%

Generation (%)	
Gen Z	30
Millennials	**35**
Gen X	**34**
Baby Boomers	22
Veterans	8

Economic status (%)	
Low	21
Medium	**35**
High	**39**

Traveller classification (%)	
Non-traveller	9
Occasional	26
Frequent	**51**

EDUCATION (%)	
Degree	**41**
Diploma	29
Upper secondary	18
Primary	8

Base: Total Sample (3500 interviews)

Slow tourism: Experience

Slow tourism experiences mainly in Italy for the moment...

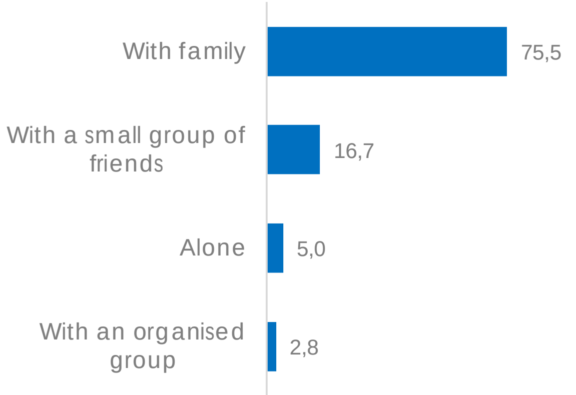
Have you had one or more of the following slow tourism experiences during the last year? (%)

27% **Did you have at least one slow tourism experience during your winter holiday?**

Italy only	Italy + Abroad	Abroad only
22%	4%	1%

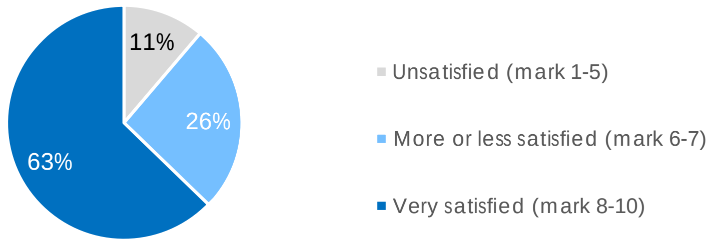
...accompanied by family

Who did you go with? (%)



...with a very satisfying impact on physical and mental well-being

How satisfied were you with this holiday with regard to your physical and mental well-being? (%)

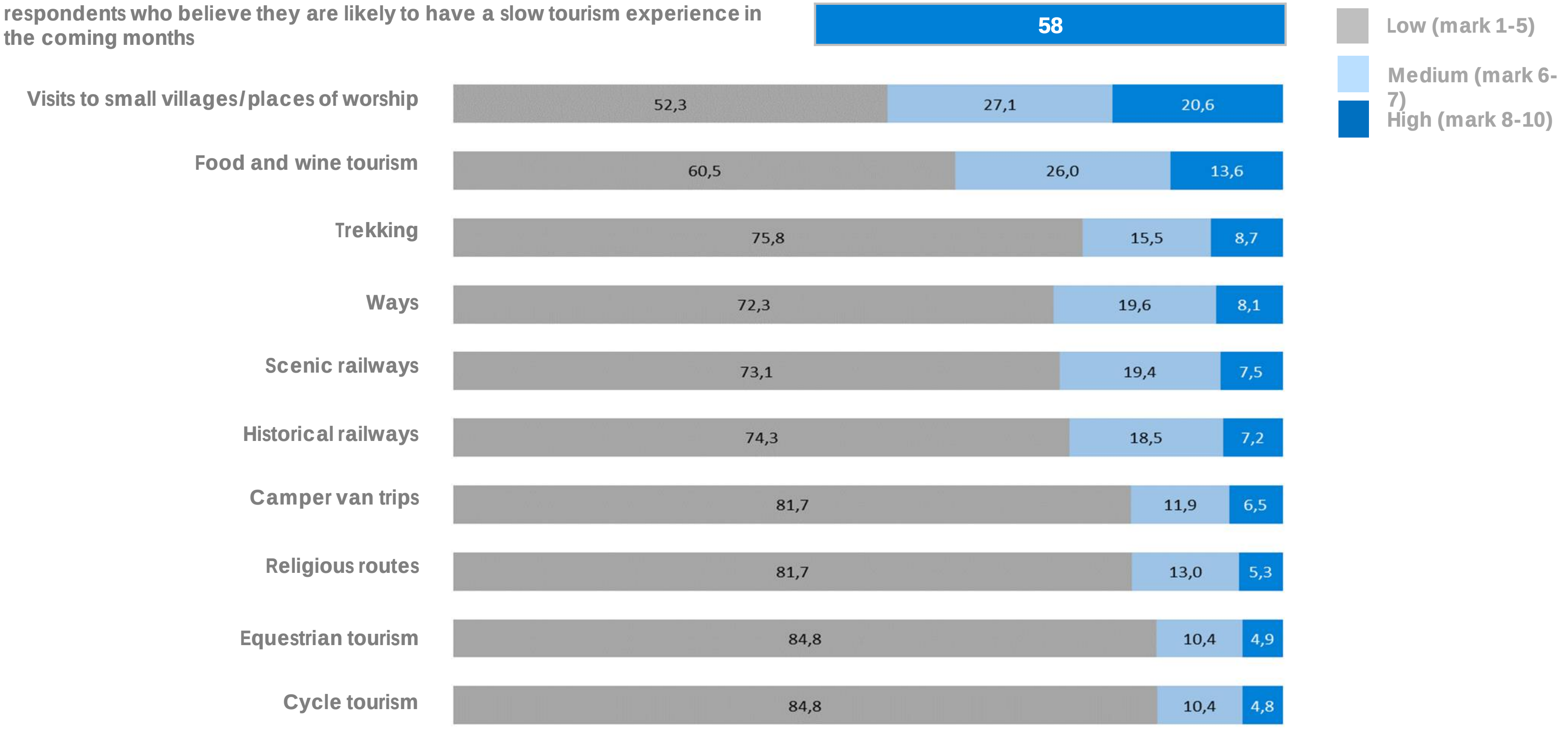


Base: Respondents who have had at least one slow tourism experience (954 interviews)

Slow tourism: Intention

More than one in two Italians are interested in slow tourism experiences in the future, particularly in destinations away from the traditional tourism routes, and in food and wine tourism experiences

How likely are you to consider one of the following slow tourism experiences in the coming months? You can use a scale from 1 to 10, where 1= very unlikely and 10 = very likely (%)

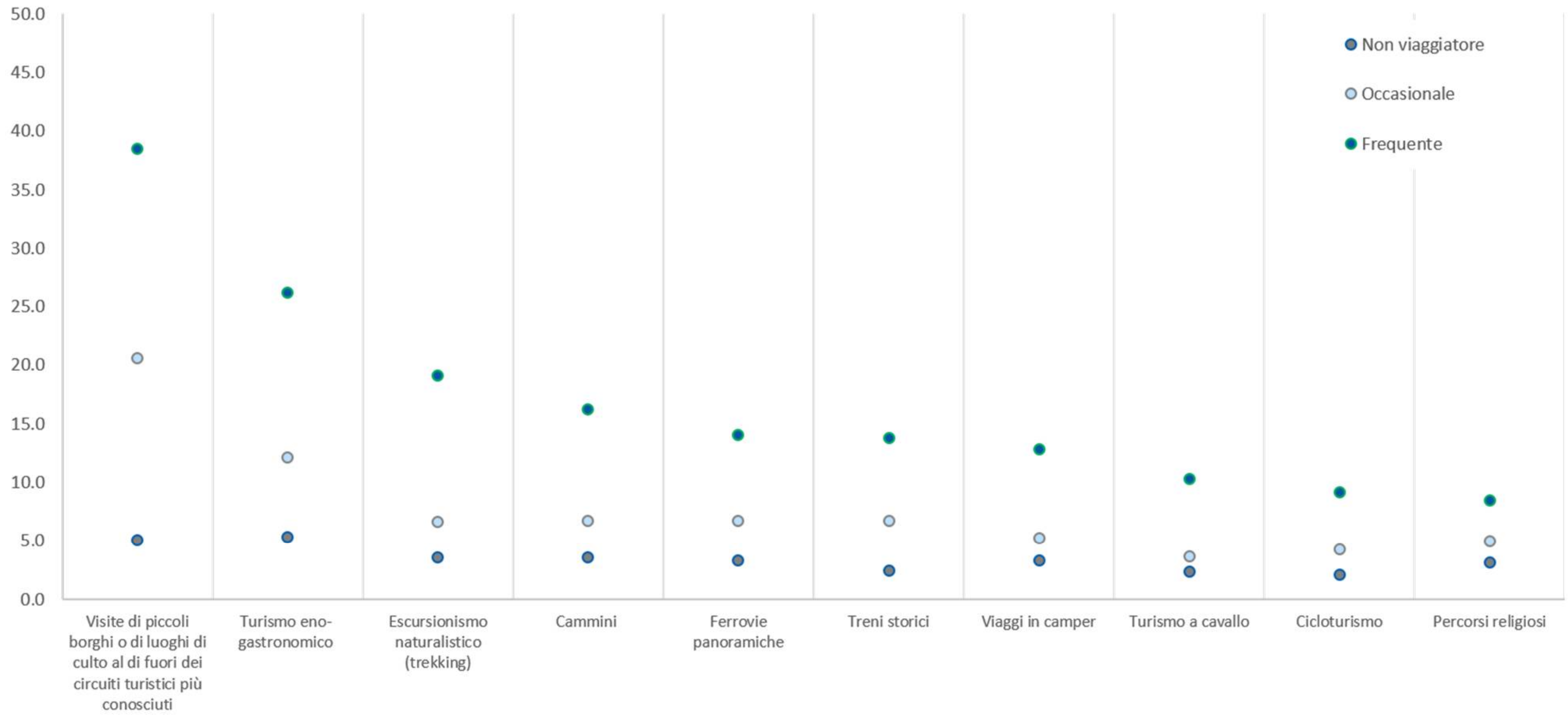


Base: Total Sample (3500 interviews)

Slow tourism: Intention

Interest in slow tourism experiences in future is correlated with frequency of travel

How likely are you to consider one of the following slow tourism experiences in the coming months? You can use a scale from 1 to 10, where 1= very unlikely and 10 = very likely (%)



Base: Total Sample (3500 interviews)

Slow tourism: Intention

Future intentions also confirm Italy as the preferred destination for slow tourism experiences, with the family or a group of friends, enjoying the rhythm of nature and the chance to relax and spend some quality time

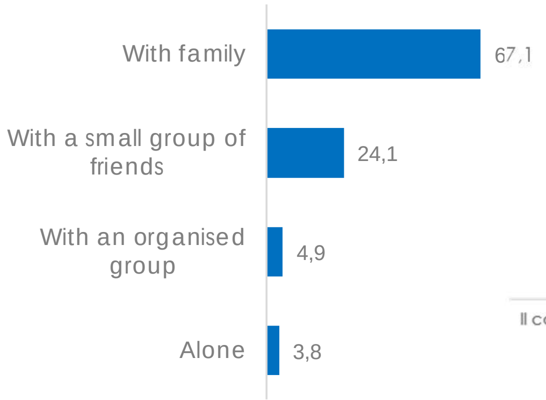
Did you engage in any of the following wellness activities during the holiday? (%)

58% **respondents who believe they are likely to have a slow tourism experience in the coming months**

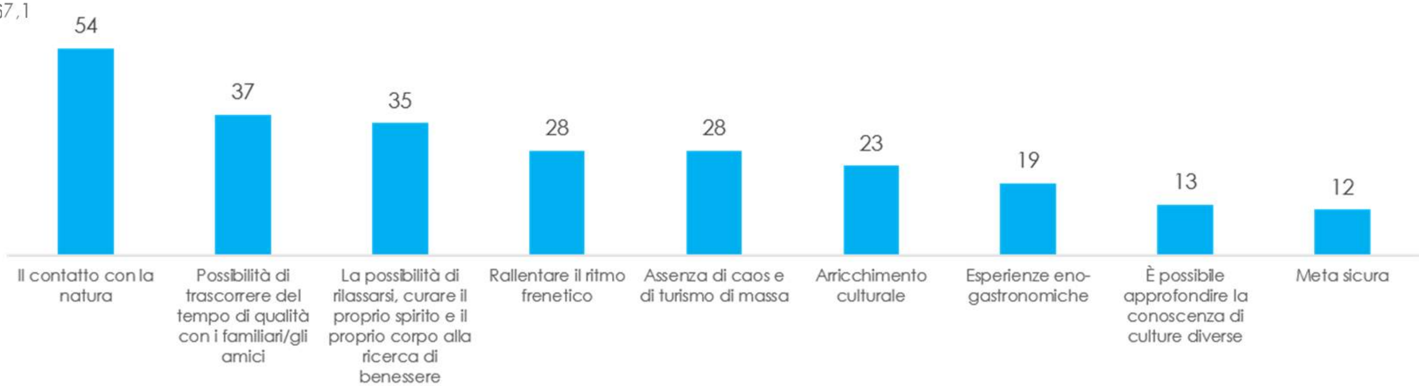
Base: Total Sample (3500 interviews)

Italy only	Italy + Abroad	Abroad only
38%	19%	1%

Who would you like to go on a slow tourism experience with? (%)



What do you find interesting about slow tourism offers? (%)



Base: respondents who believe they are likely to have a slow tourism experience (2042 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 gone on holiday in this period? (Economic reasons)
- How much do you expect to / did you 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

Registered Office
Florence
Via Atto Vannucci, 7
50134 Florence
+ 39 055 470374

Business Offices
Rome
Via dei Galla e Sidama, 23
00199 Rome

Milan
Viale Brianza, 24
20127 Milan

Florence
Via F. Gianni, 4r
50134 Florence

Group Companies