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ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

Survey into trends in the accommodation sector

July 2021

Method

May 2021 - First wave	June 2021 - Second wave
Universe of interest Companies operating in the tourism industry	Universe of interest Companies operating in the tourism industry
Sample size 6000 interviews	Sample size 6000 interviews
Margin of error (level of reliability 95%) +/- 1.3%	Margin of error (level of reliability 95%) +/- 3.3%
Data collection and processing method Interview method: CATI and CAWI Type of questionnaire: structured Data processing: SPSS 19.0	Data collection and processing method Interview method: CATI and CAWI Type of questionnaire: structured Data processing: SPSS 19.0
Interviews conducted: May 2021	Interviews conducted: June 2021

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Tourist establishments interviewed as part of the sample

Tourist establishments before and during the pandemic

- The research involved interviewing the managers of approximately 6000 tourist establishments (6006 in the first survey and 6027 in the second), which included not only hotels but also other facilities all over Italy (the North West, North East, Centre, South and Islands).
- The average number of members of staff reported by the managers interviewed decreased during the pandemic (from 5.7 to 4.1). There was a bigger drop at hotels (from 11.0 to 7.3), while the average number of members of staff at non-hotel establishments fell from 3 to 2.4.
- The majority of the tourist establishments interviewed stated that they were open all year round. Just under 40% of them reported a seasonal approach to opening. Between the first and second surveys, there was an increase in the percentage of hotel establishments that stated that they took a seasonal approach to opening (from 36.9% to 38.9%).
- The average opening period was 9 months a year in 2019. This fell by almost half during the pandemic (April 2020-April 2021) to an average of 4.6 months. There was a similar fall in the average occupancy rates of the establishments, which went from approximately 60% to 30% during the public health emergency.

Type

Establishments interviewed as part of the sample (data not weighted)

May 2021 - First wave

	Total cases
5-star hotels & 4-star hotels	405
3-star hotels	964
2-star hotels	349
1-star hotels	166
Aparthotels	185
Total Hotel Establishments	2069
Campsites - Holiday villages	174
Agritourism establishments	1240
Youth hostels, Holiday homes, Mountain huts, etc.	289
Bed and breakfasts	2234
Total Non-Hotel Establishments	3937
Total	6006

June 2021 - Second wave

	Total cases
5-star hotels & 4-star hotels	401
3-star hotels	948
2-star hotels	348
1-star hotels	165
Aparthotels	190
Total Hotel Establishments	2052
Campsites - Holiday villages	181
Agritourism establishments	1237
Youth hostels, Holiday homes, Mountain huts, etc.	291
Bed and breakfasts	2266
Total Non-Hotel Establishments	3975
Total	6027

Average number of members of staff

May 2021 - First wave

	Average Total	Total in Hotel Establishments	Total in Non-Hotel Establishments
Average number of members of staff before the pandemic (2019)	5.7	11.0	3.0
Average number of members of staff between April 2020 and April 2021	3.8	6.8	2.2

June 2021 - Second wave

	Average Total	Total in Hotel Establishments	Total in Non-Hotel Establishments
Average number of members of staff before the pandemic (2019)	5.7	11.0	3.0
Average number of members of staff between April 2020 and April 2021	4.1	7.3	2.4

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Opening
(all year round or seasonal)

May 2021 - First wave

	Total In %	Total Hotel Establishments	Total Non-Hotel Establishments
All year round	63.1	61.9	63.7
Seasonal	36.9	38.1	36.3
TOTAL	100.0	100.0	100.0

June 2021 - Second wave

	Total In %	Total Hotel Establishments	Total Non-Hotel Establishments
All year round	61.1	58.3	62.6
Seasonal	38.9	41.7	37.4
TOTAL	100.0	100.0	100.0

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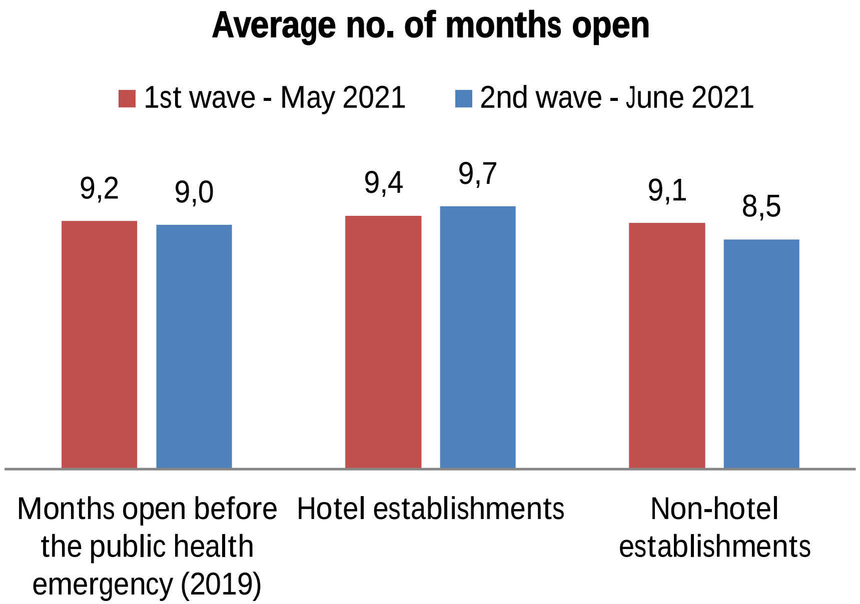
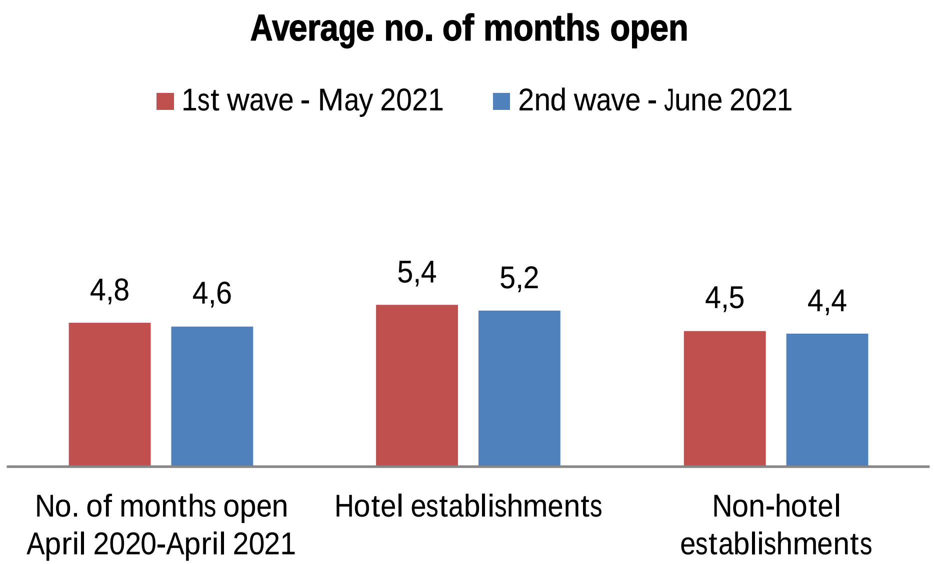
Months of opening at tourist establishments before and during the pandemic

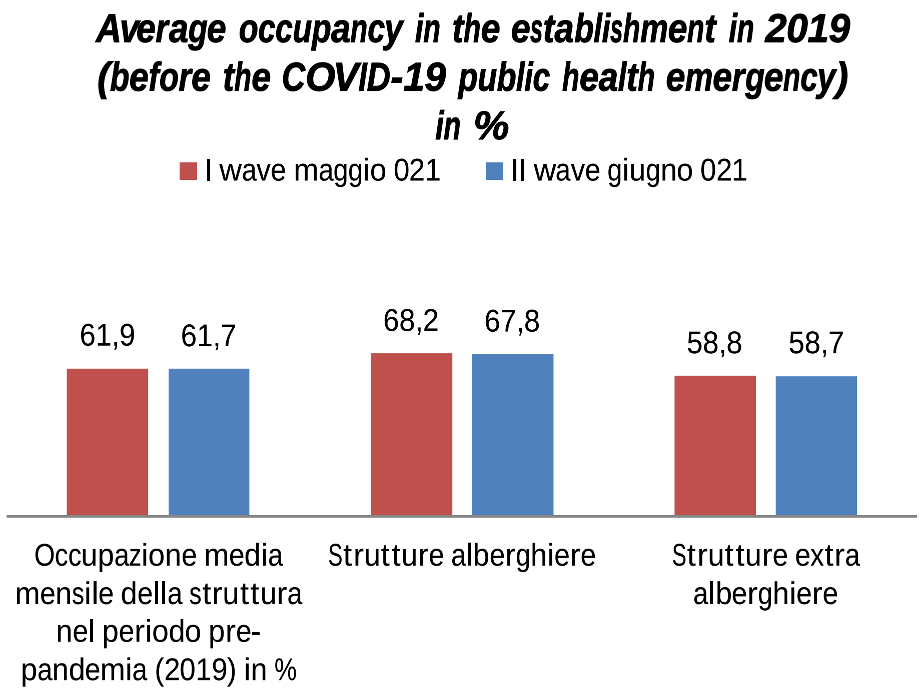
In 2019, before the COVID-19 public health emergency, how many months were you open?

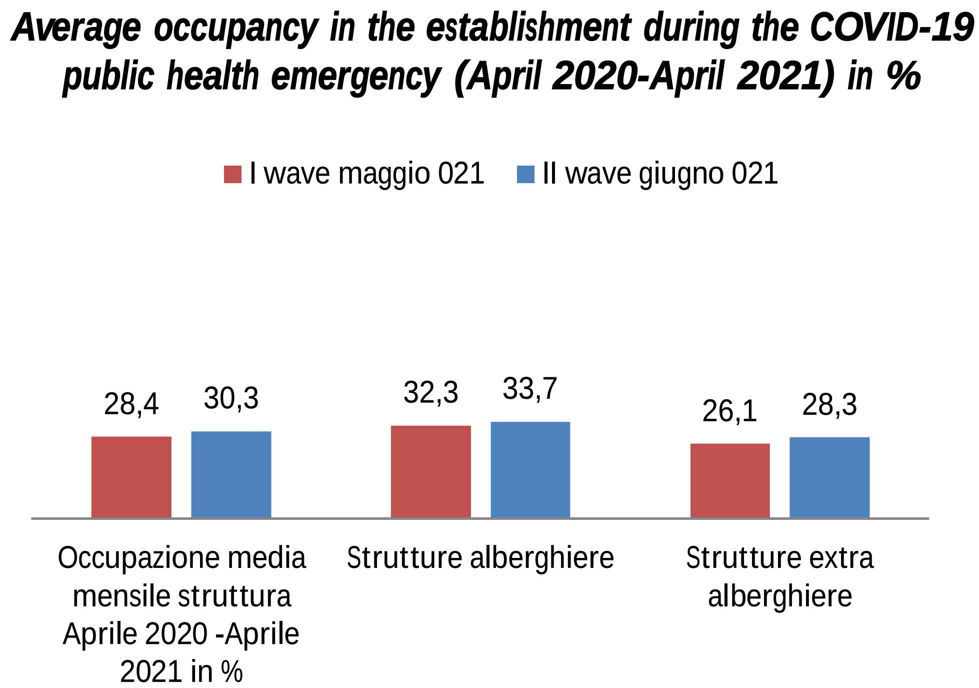


During the COVID-19 public health emergency (April 2020-April 2021), how many months were you open?



Average monthly occupancy at tourist establishments before and during the pandemic





Base: establishments open at the time in question

2.
The current situation

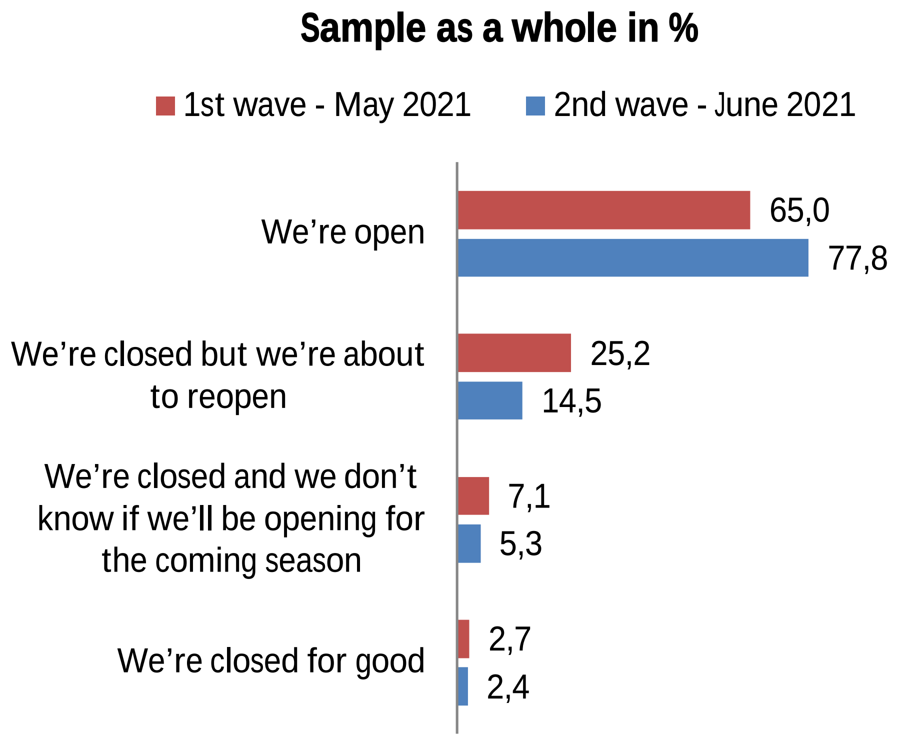
The current situation/1

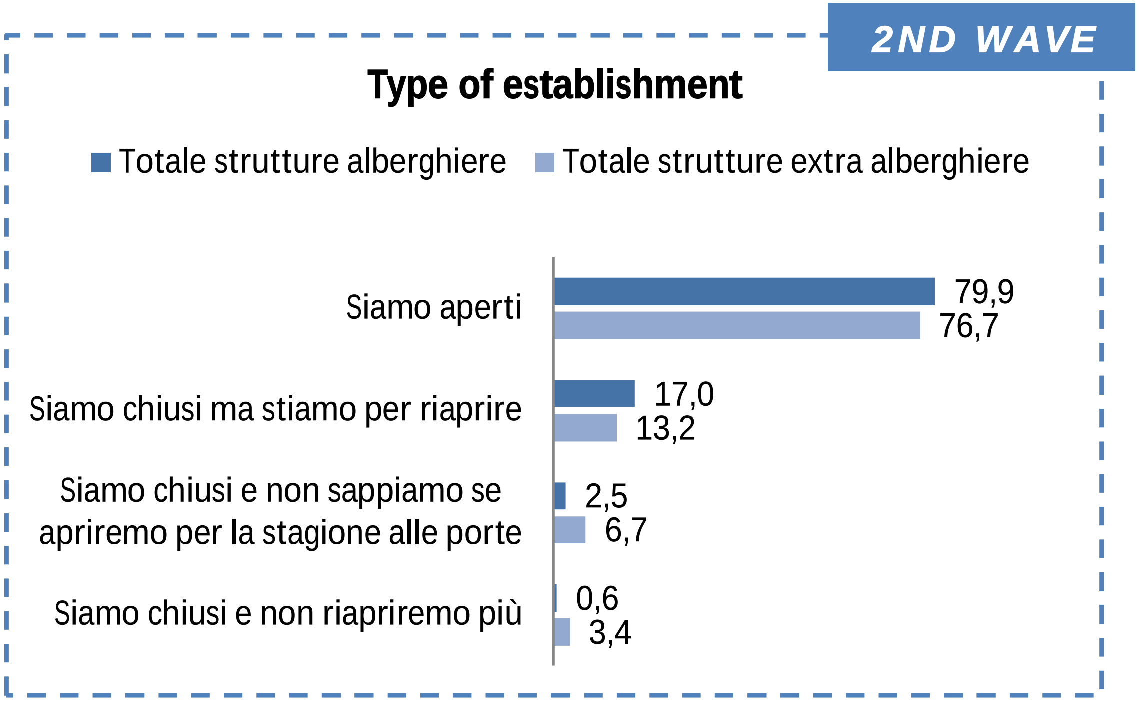
- Between the first and second surveys, there was an increase in the percentage of tourist establishments that are currently open. The figure was up from 65% of the sample in May to 77.8%.
- There has been a sharp fall in the number of foreign customers compared to before the pandemic. At present approximately 88% of all tourists are Italian, compared to 60% before 2019.
- Germans continue to make up the largest proportion of foreign visitors in Italian tourist establishments, while there has been a sharp fall in the flow of visitors from the United States and – among the Europeans – the United Kingdom, France and Spain.
- Although there has been a drop compared to the period before the pandemic, couples/families remain the most common type of customers to have stayed in the selected tourist establishments. In the period from April 2020 to April 2021, there was a drop in all customer types except for business guests: the only type of target customer that saw growth in the period in question.
- At present, more than 70% of the establishments interviewed say that they have bookings for July and August. This marks an increase on the percentage in last month's survey and shows that interest in the industry is growing among customers. At the moment approximately 40% of the facilities available have been booked by customers in July, 50% in August and 30% in September. It should be noted that non-hotel establishments have proved more popular than hotel establishments, albeit only slightly.
- Couples and families are currently the target customers who are most interested in booking their summer holidays and they are showing a clear preference for non-hotel establishments. In contrast, simple tourists, single travellers and business customers have all opted for hotels.

The current situation/2

- The majority of bookings (more than 70%) are from within the same region or other regions of Italy, but the estimated proportion of foreign guests stands at approximately 30%. The highest number of foreign bookings continues to come from Germany, followed by France. It is worth noting that there is a clear preference for non-hotel establishments among Dutch and Belgian tourists, whereas their Austrian and Swiss counterparts tend to choose to book stays in hotels.
- The figures show a small degree of optimism among the managers of tourist establishments who were interviewed. On average, they expect to see an increase of approximately 10% in the occupancy rates in their establishments in the coming summer months, on top of the bookings that have already been made.
- The figures about the online presences of the tourist businesses interviewed are interesting. In the last survey, their websites and social media accounts were the most frequently used channels for bookings, followed by online travel agencies. The numbers show that more than three quarters of the tourist establishments have social media profiles and that they are particularly widespread among tourist businesses in the South of Italy.

The situation today





Places of origin of customers

Could you state the percentage of Italian and foreign customers in your establishment in the period before the pandemic (2019) and the current period?

May 2021 - First wave

	Nationalities of the customers of the establishment before the pandemic (2019) in %	Nationalities of the customers of the establishment in the current period in %
Italian	59.8	88.2
Foreign	40.2	11.8
Total	100.0	100.0

June 2021 - Second wave

	Nationalities of the customers of the establishment before the pandemic (2019) in %	Nationalities of the customers of the establishment in the current period in %
Italian	60.6	88.4
Foreign	39.4	11.6
Total	100.0	100.0

Base: establishments that had customers in the period in question

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Places of origin of foreign customers

May 2021 - First wave

	Main foreign countries of origin of customers in the period before the pandemic (2019)	Main foreign countries of origin of customers between April 2020 and April 2021
Germany	71.2	69.2
France	41.8	35.8
Netherlands	17.3	14.5
United Kingdom	16.7	8.1
Switzerland	15.6	18.7
Austria	14.3	15.9
United States	13.8	3.5
Belgium	10.9	9.0
Spain	6.9	2.7
Other countries	31.2	14.5

June 2021 - Second wave

	Main foreign countries of origin of customers in the period before the pandemic (2019)	Main foreign countries of origin of customers between April 2020 and April 2021
Germany	71.4	71.3
France	41.0	34.9
Netherlands	17.9	15.1
United Kingdom	16.6	8.0
Austria	14.8	16.5
Switzerland	14.5	18.5
United States	13.8	3.0
Belgium	11.0	10.3
Spain	5.9	3.4
Other countries	31.8	22.0

Base: establishments that had foreign customers in the period in question
Multiple-choice questions

Type of guests

May 2021 - First wave

	The main type of guests at the establishment in the period before the pandemic (2019) in %	The main type of guests at the establishment between April 2020 and April 2021 in %
Couples/Families	77.5	69.9
Tourists/Leisure travellers	32.5	23.5
Single travellers	15.7	14.6
Business customers	14.5	19.3
Groups	11.4	6.0
Students/Schools	2.8	2.3
Conference attendees	1.7	1.2
Other	1.0	0.6

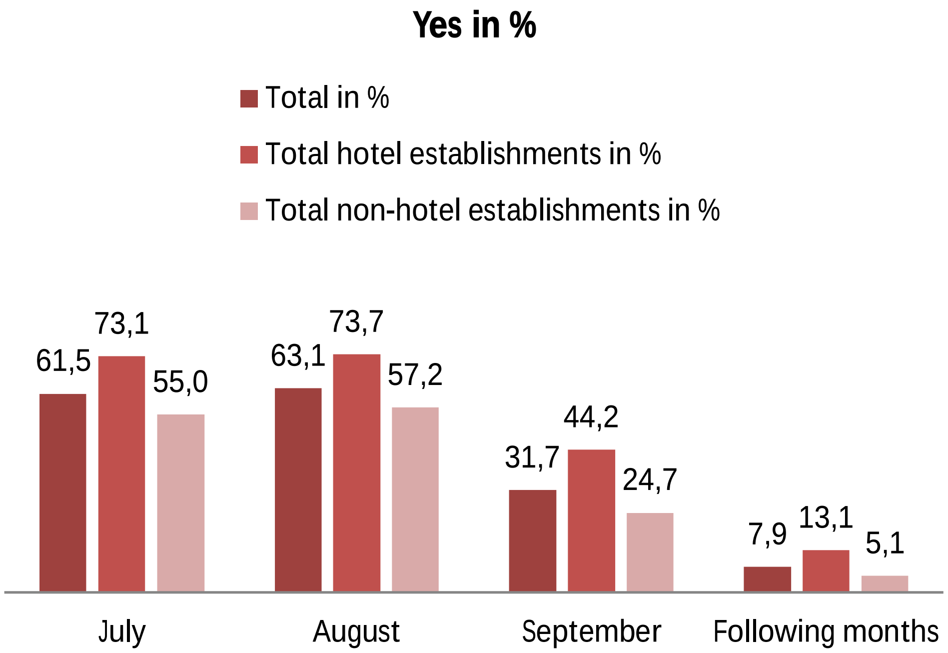
June 2021 - Second wave

	The main type of guests at the establishment in the period before the pandemic (2019) in %	The main type of guests at the establishment between April 2020 and April 2021 in %
Couples/Families	78.9	73.8
Tourists/Leisure travellers	31.1	23.2
Single travellers	14.5	12.8
Business customers	13.6	16.9
Groups	10.6	5.7
Students/Schools	2.1	1.8
Conference attendees	1.4	1.0
Other	0.9	0.7

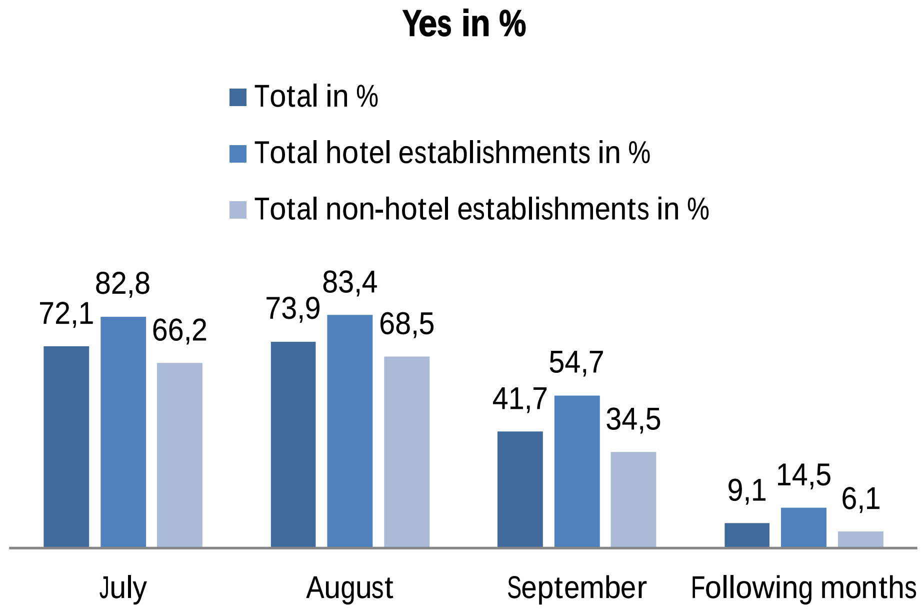
Base: establishments that had customers in the period in question
Multiple-choice questions

Bookings

The establishment currently has bookings for…



May 2021 - First wave

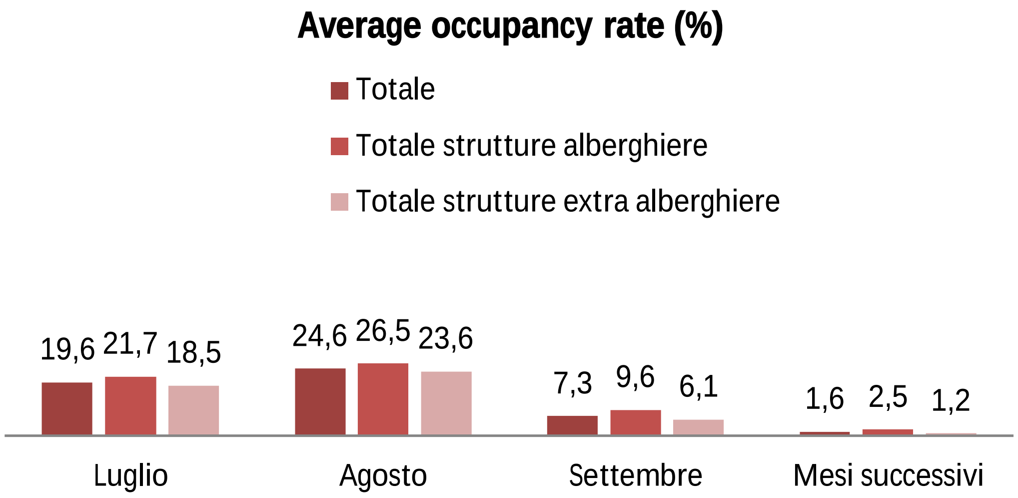


June 2021 - Second wave

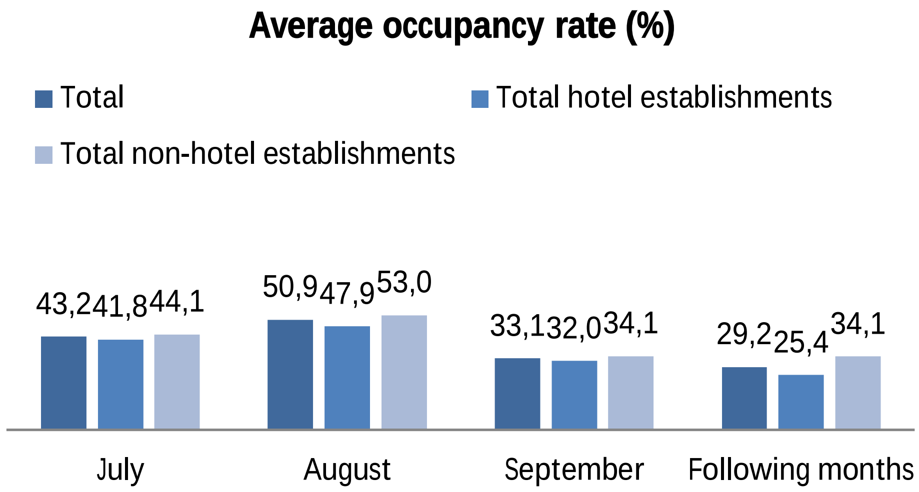
Base: establishments that are open or about to reopen

Occupancy rate of tourist establishments in %

As a percentage, what is the average occupancy rate of the establishment in...



May 2021 - First wave



June 2021 - Second wave

Base: establishments that are open or about to reopen

Type of guests that are making bookings

May 2021 - First wave

	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	76.8	71.6	80.3
Tourists/Leisure travellers	28.7	32.4	26.3
Single travellers	12.1	14.8	10.3
Business customers	10.0	14.7	7.0
Groups	7.4	10.3	5.5
Students/Schools	1.3	1.1	1.5
Conference attendees	1.1	1.4	0.9
Other	0.6	0.9	0.5
Don’t know/No answer	0.7	0.7	0.8

June 2021 - Second wave

	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	79.9	75.1	82.9
Tourists/Leisure travellers	27.6	31.2	25.3
Single travellers	10.7	13.7	8.8
Business customers	9.2	13.1	6.6
Groups	7.2	9.5	5.7
Students/Schools	1.0	1.2	0.9
Conference attendees	0.9	1.3	0.6
Other	0.8	0.9	0.8
Don’t know/No answer	0.5	0.4	0.5

Multiple-choice question
Base: establishments that stated they are receiving bookings

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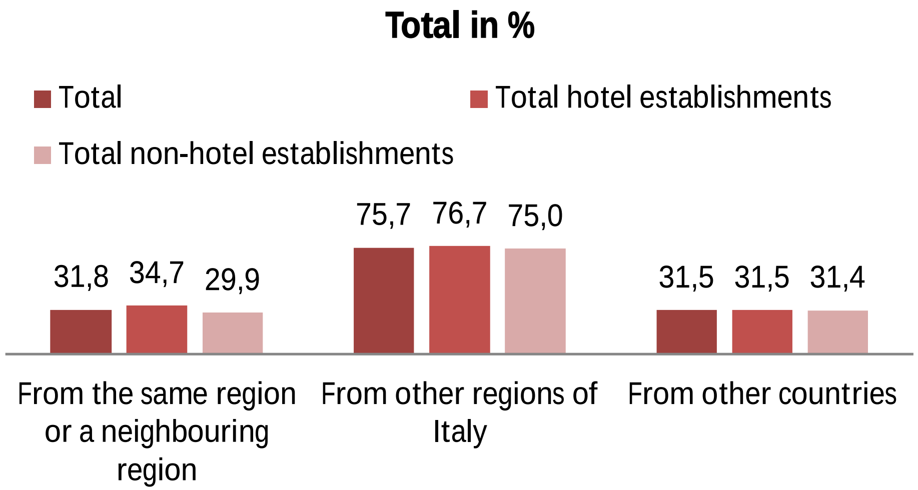
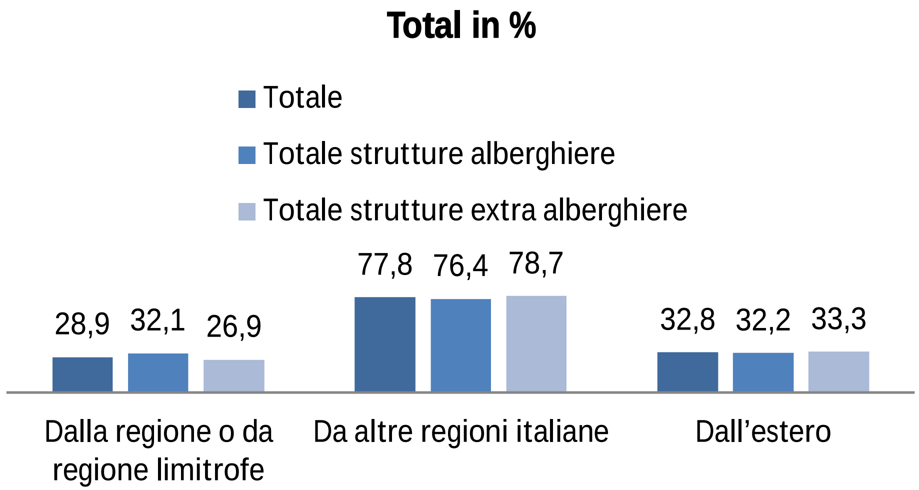
Places of origin of customers making bookings

Where are the majority of the customers that are booking from?



May 2021 - First wave



June 2021 - Second wave

Base: establishments that stated they are receiving bookings
Multiple-choice question

Places of origin of foreign customers making bookings

May 2021 - First wave

	Total in %	Hotel establishments	Non-hotel establishments
Germany	70.1	72.0	69.0
France	24.7	20.9	27.2
Netherlands	19.0	8.7	25.7
Austria	18.1	28.2	11.5
Switzerland	16.5	20.4	13.9
Belgium	12.3	7.2	15.7
United Kingdom	8.4	8.4	8.3
United States	6.3	5.2	7.0
Other countries	17.7	19.8	16.3

June 2021 - Second wave

	Total in %	Hotel establishments	Non-hotel establishments
Germany	72.0	73.8	70.9
France	27.1	26.6	27.4
Netherlands	19.0	9.6	24.7
Austria	17.7	25.8	12.7
Switzerland	15.0	19.9	12.0
Belgium	12.5	8.7	14.7
United States	7.4	8.1	6.9
United Kingdom	6.9	5.9	7.6
Other countries	20.8	21.7	20.2

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

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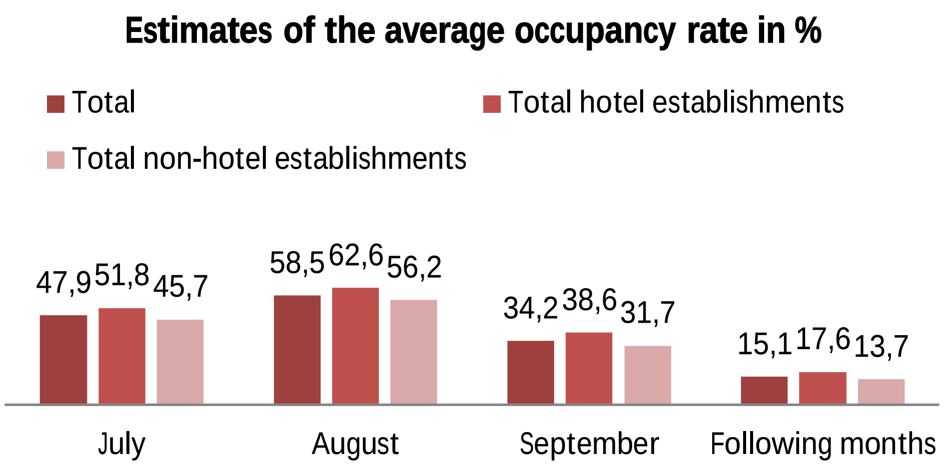
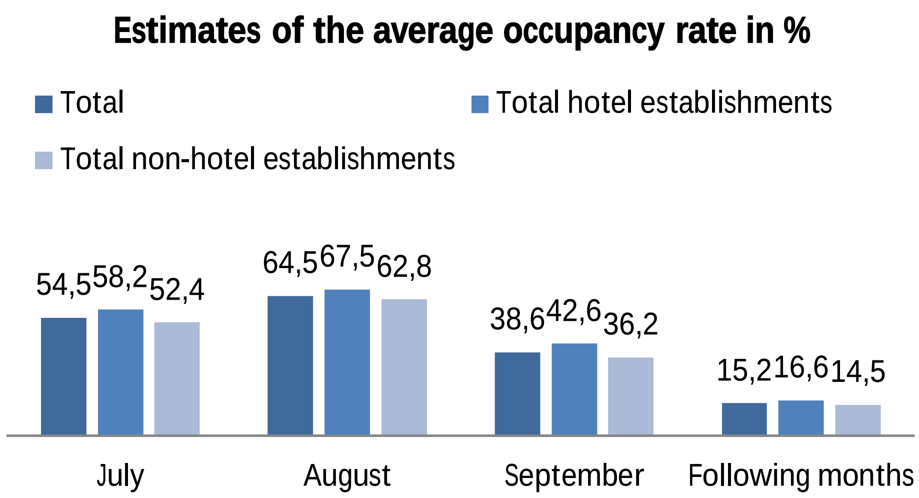
Estimate of the occupancy rate of tourist establishments (in %) in the coming months

What do you estimate will be the actual occupancy rate of the establishment in the coming months?



May 2021 - First wave



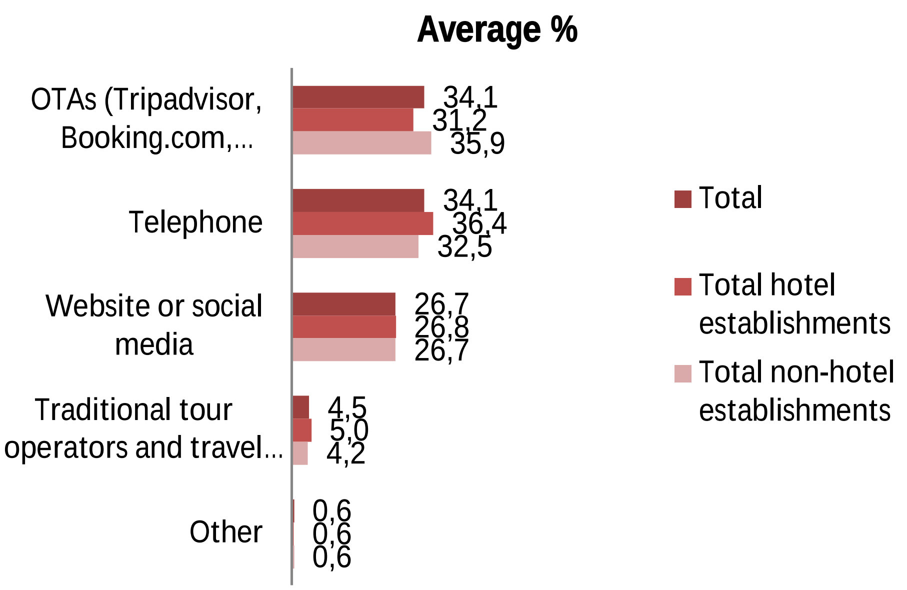
June 2021 - Second wave

Base: establishments that are open or about to reopen

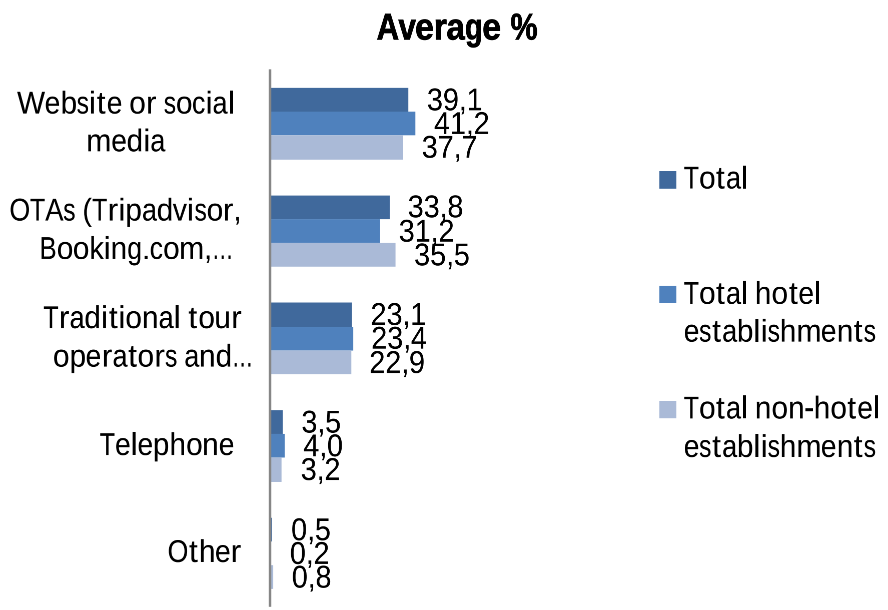
Booking channels

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

May 2021 - First wave



June 2021 - Second wave

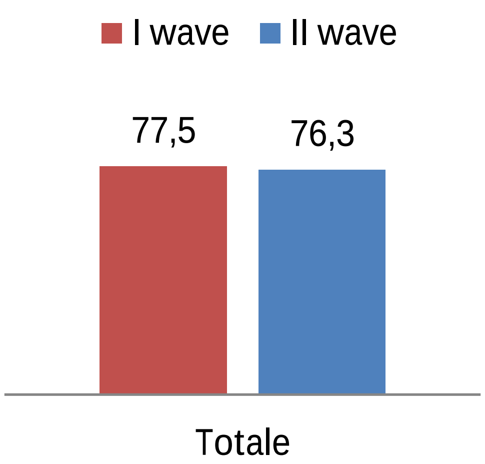


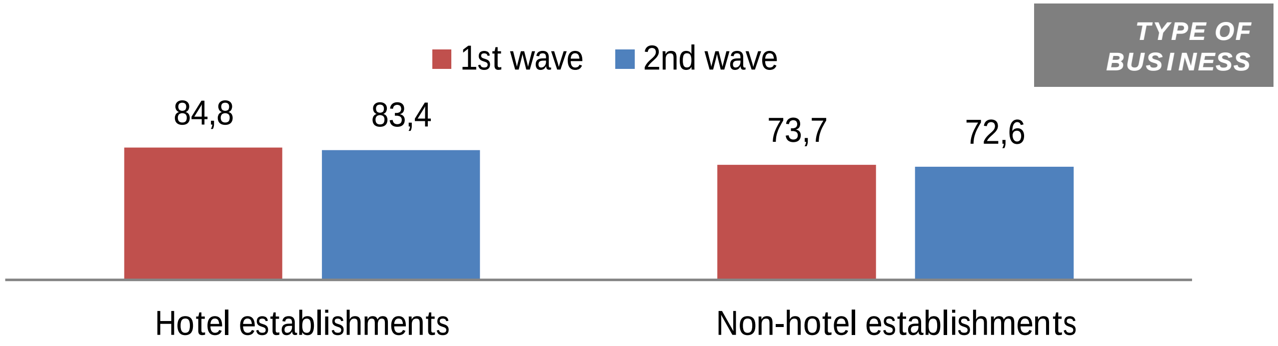
Base: establishments that are open or about to reopen and are receiving bookings

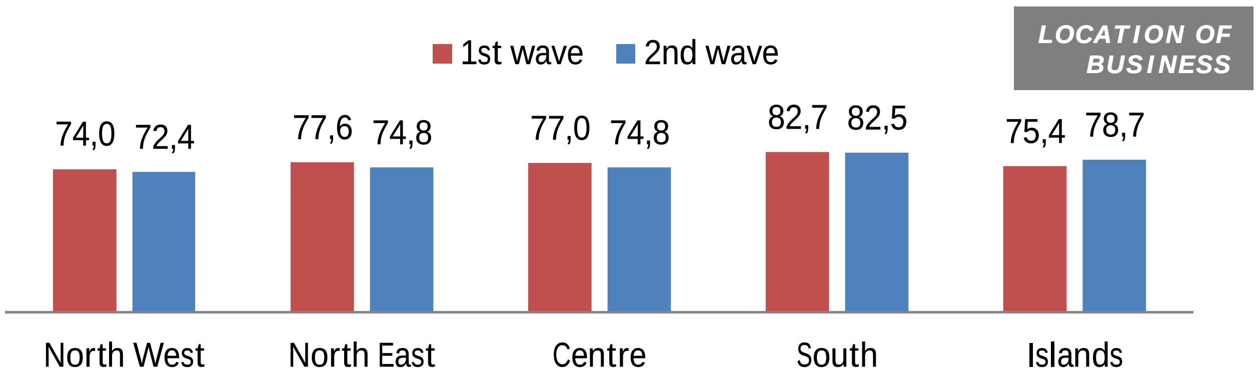
Tourist establishments on social media

Is your establishment on social media?

Yes in %





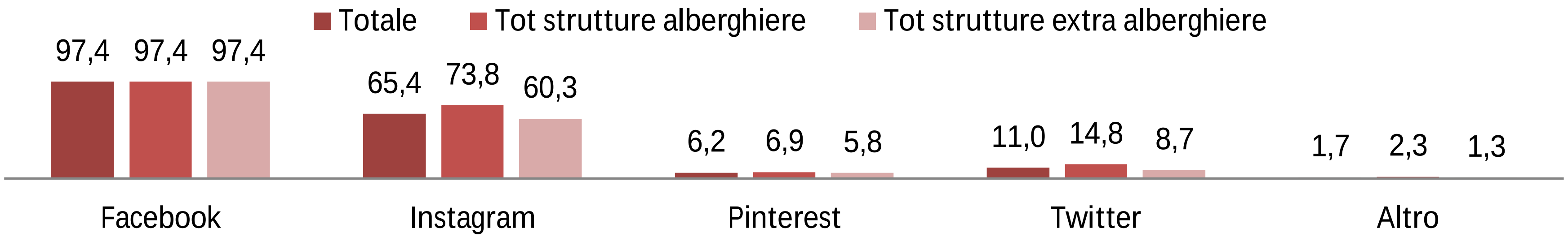


Tourist establishments on social media

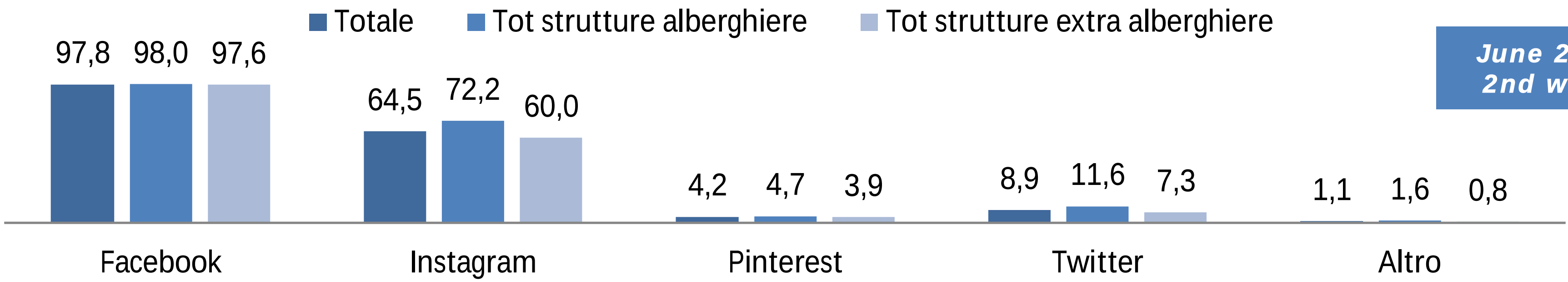
Is your establishment on…?

May 2021
1st wave

Yes in %



June 2021
2nd wave



Base: establishments that say they are on social media

3.
Requirements of recovering tourist establishments

Requirements of the recovering industry/1

- 57% of the businesses interviewed applied for financial support and it was given to 66.8% of these businesses, with a slightly higher percentage of hotel establishments than non-hotel establishments receiving it (69% compared to 64%).
- The amount of financial support was deemed “paltry” by the majority (65%) of the businesses that received it and among all of the types of businesses, the most scathing opinions on this front were expressed by hotel managers.
- The majority of those included in the sample were in favour of establishing rescue funds with the support of public resources and fundraising among private financial players that are interested in investing in businesses deemed capable of future development. Bearing in mind the financial requirements of their industry – which has been so badly affected by the pandemic – the respondents hope to be given help covering their fixed costs in particular. The forms of support that are most in demand among respondents are tax relief and grants for disinfection and/or renovation of their premises.
- The last survey also looked into whether the businesses interviewed are searching for staff. 17% of them are, with more hotels doing so than non-hotel establishments (31.3% and 9.6% respectively). The vast majority of them are having trouble finding staff, which they mostly blame on a lack of motivation among candidates. The biggest recruitment difficulties reported involve waiting staff (56%), followed by cleaners and then chefs.

Requirements of the recovering industry/2

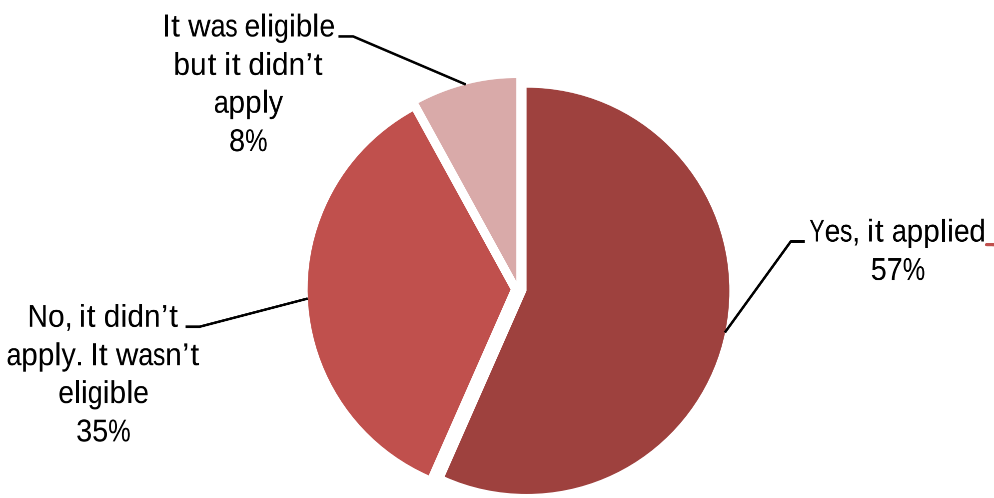
- Aside from economic matters, the main causes of complaint among tourist businesses are shortcomings in terms of national and international public promotion for their local areas and communication by institutions.
- With the summer season in mind, tourist establishments are focusing first and foremost on health and safety in their premises in order to cater to the new needs stemming from the pandemic.
- In addition, 37% of the managers interviewed would welcome the opportunity to apply for a bonus that would also enable them to enhance the visual appeal of their premises during renovation/refurbishment work.
- In any case, in order to face and overcome the current crisis the businesses in the field voiced the need for ‘public’ action, which would be a more popular move than giving private players more freedom to take measures (with backing of 66% and 26% respectively).

Requests for financial support

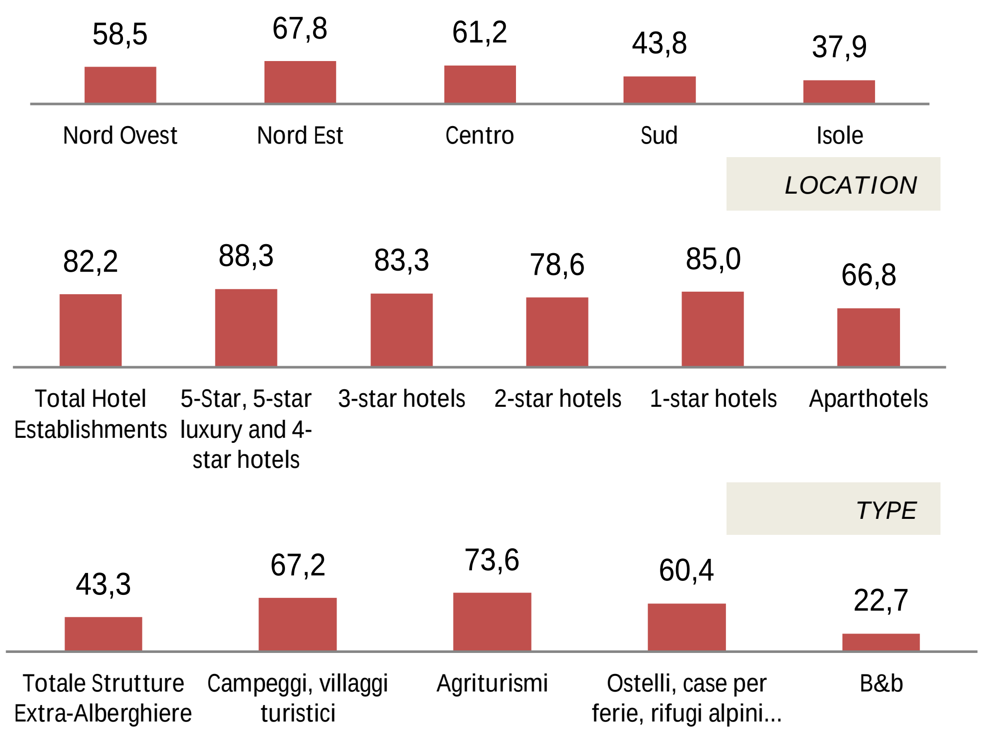
1ST WAVE May 2021

In the last year, the government has provided financial support.
Did your establishment apply for it?

Sample as a whole in %



Requests for financial support in %

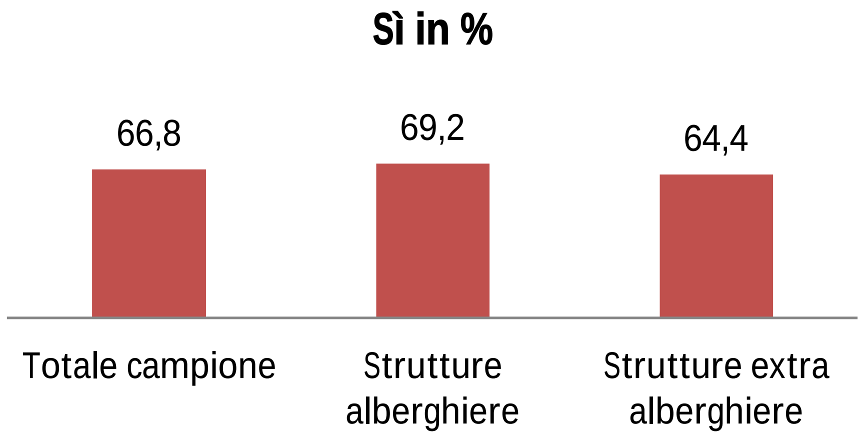


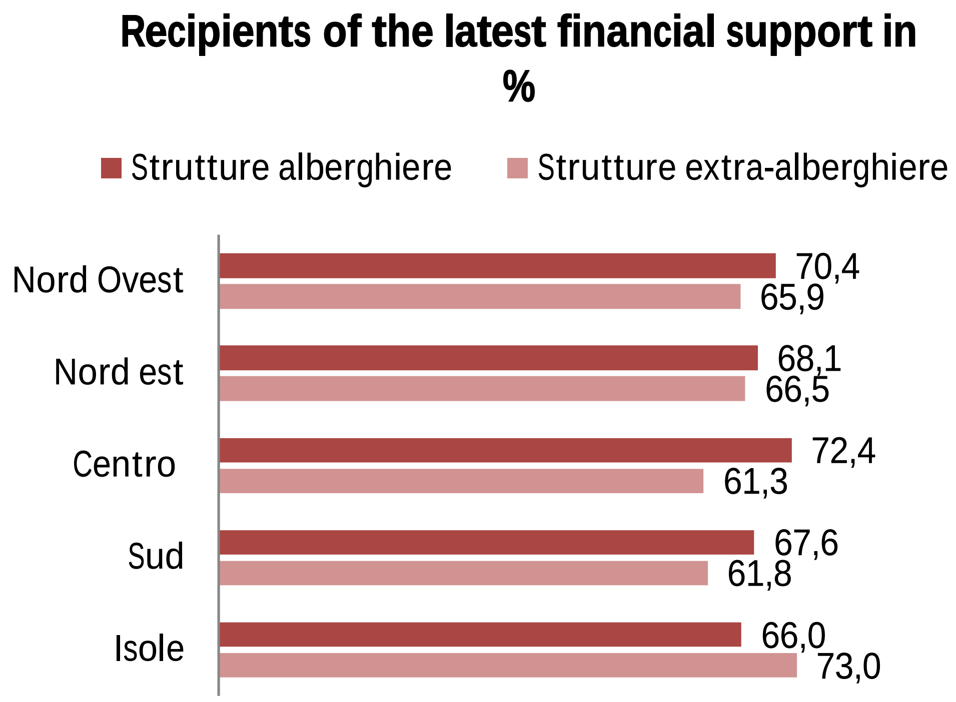
ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

The recipients of financial support

1ST WAVE May 2021

Did you receive the latest financial support?





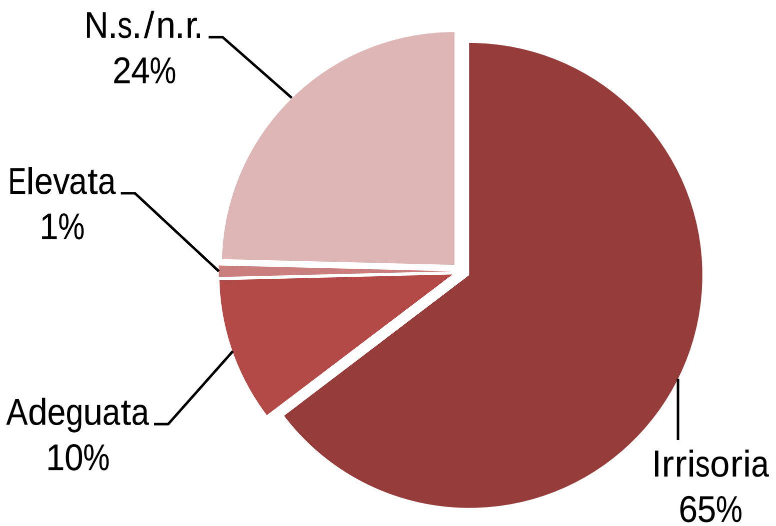
Everyone who applied for financial support was asked the question

Rating the amount of financial support

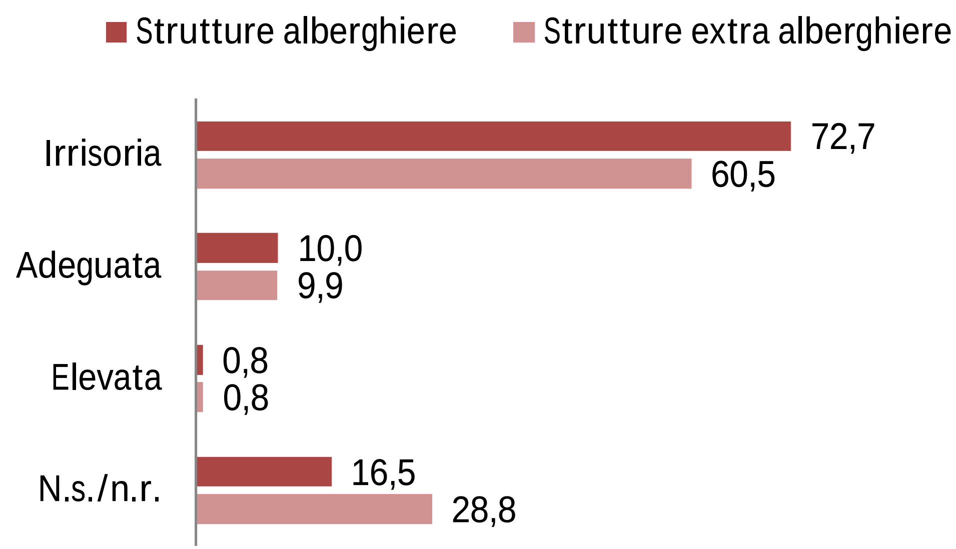
1ST WAVE
May 2021

How would you describe the amount of financial support provided by the government for your field?

Totale campione in %



Recipients of the latest financial support in %

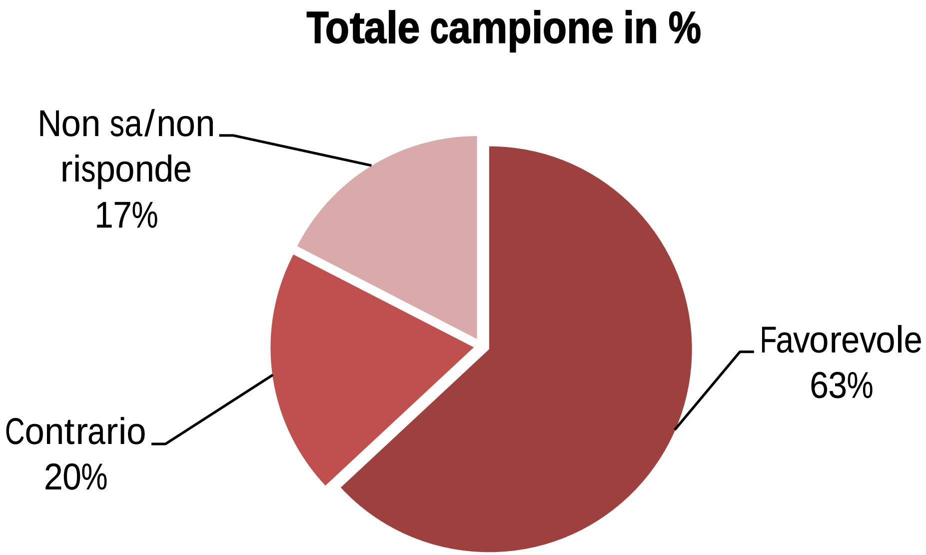


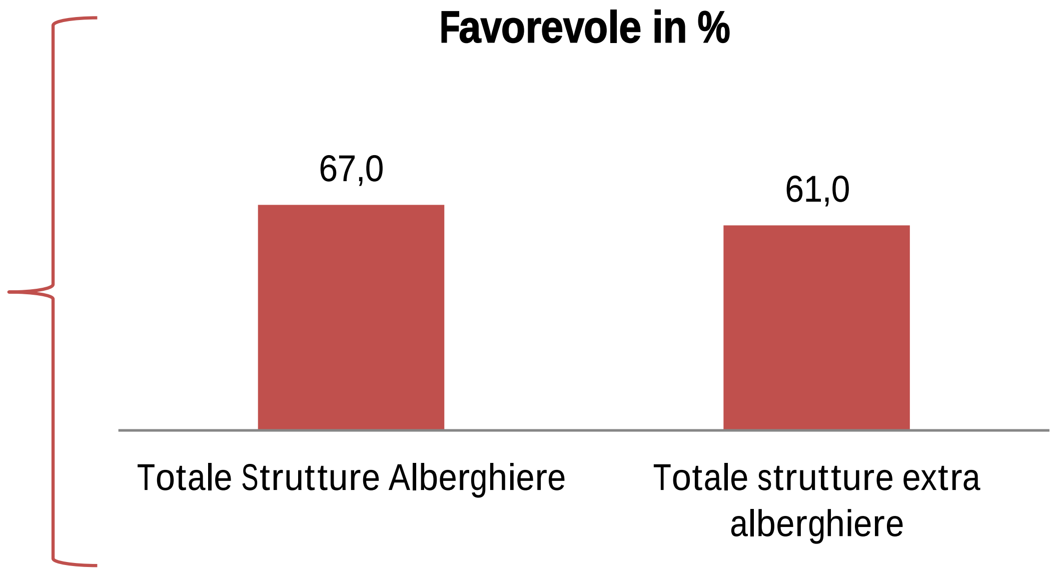
How to combat the shortage of liquidity

1ST WAVE
May 2021

In response to the needs arising due to a shortage of liquidity, a proposal has been made to establish rescue funds, with the support of public resources and fundraising among private financial players that are interested in investing in businesses deemed capable of future development. Would you be in favour of this?

TYPE OF ESTABLISHMENT

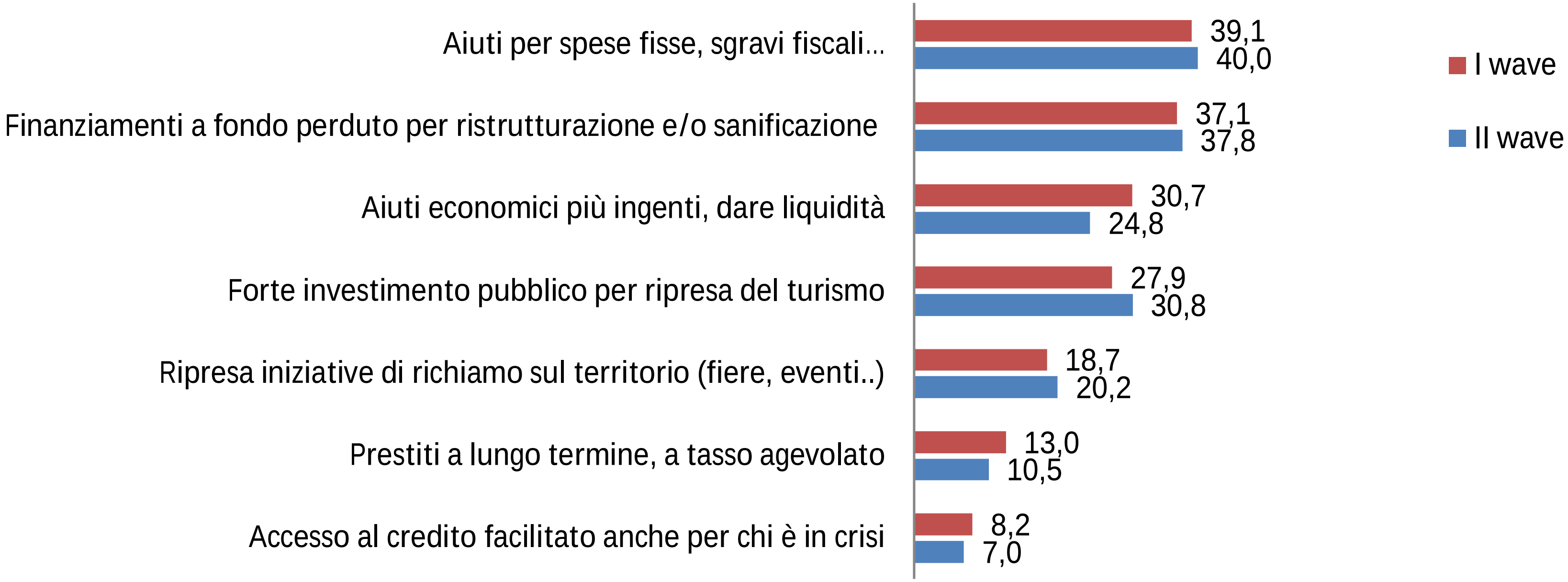




What response should be given to the financial needs of the industry? Expectations in the trade

In addition to financial support, what would be the best action to take to cater to the financial needs of an industry that has been so badly affected by the pandemic?

Sample as a whole in %



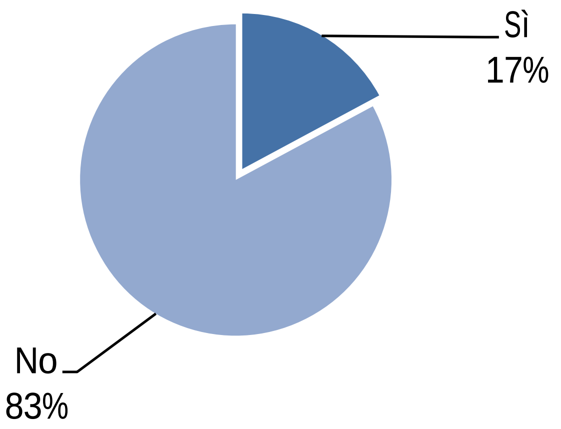
Multiple-choice question

Searching for staff for the summer season

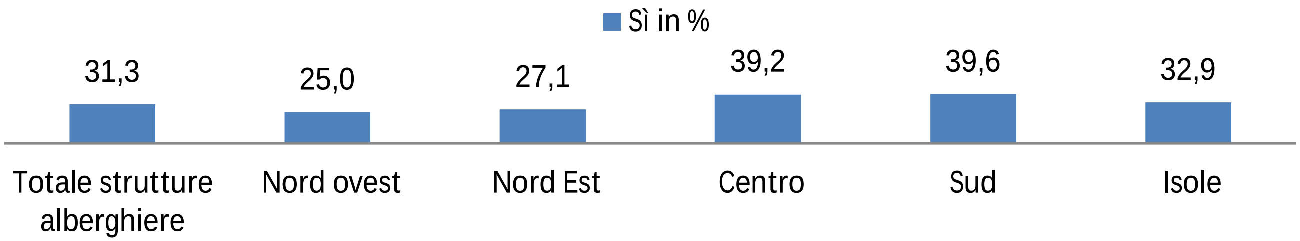
June 2021
2nd wave

Are you looking/have you looked for staff for the summer season at your establishment?

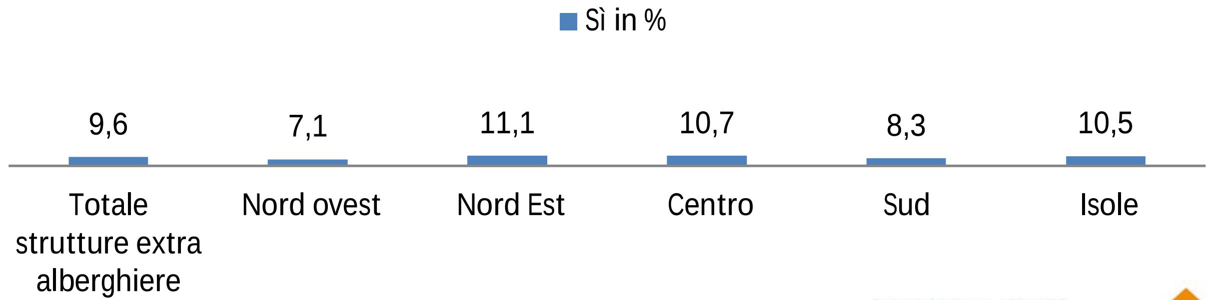
Totale campione in %



Hotel establishments



Non-hotel establishments



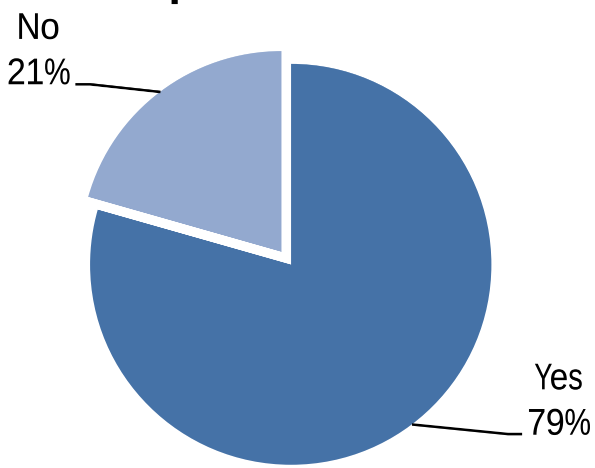
Base: establishments that have not closed for good

Difficulties searching for staff for the summer season

June 2021
2nd wave

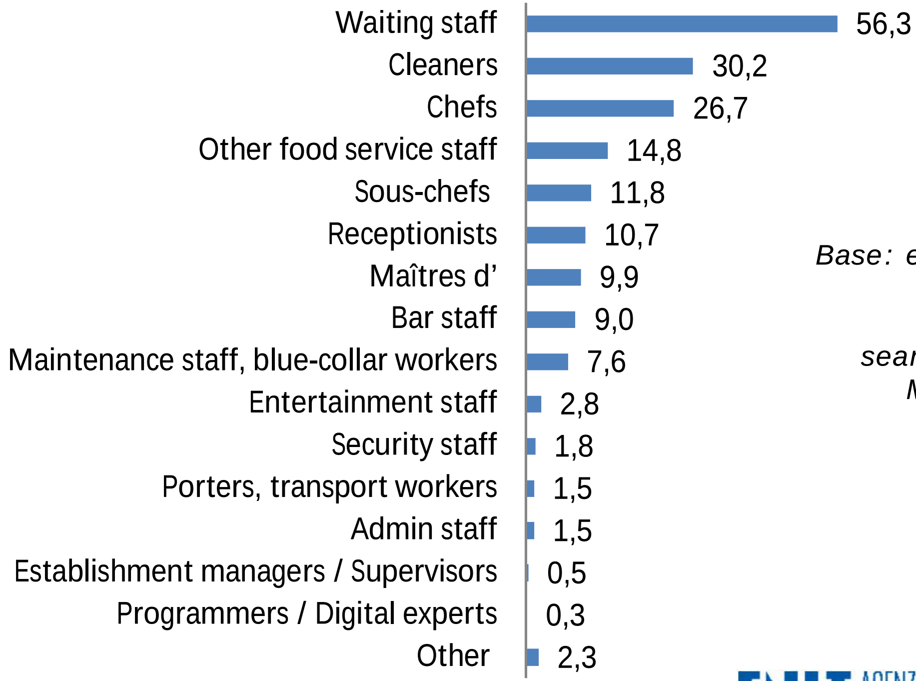
Have you had/are you having trouble finding the qualified staff that you need?

Sample as a whole in %



Base: establishments that have searched/are searching for staff

For which roles in particular have you had/are you having trouble finding staff?



Base: establishments that have searched/are searching for staff Multiple-choice question

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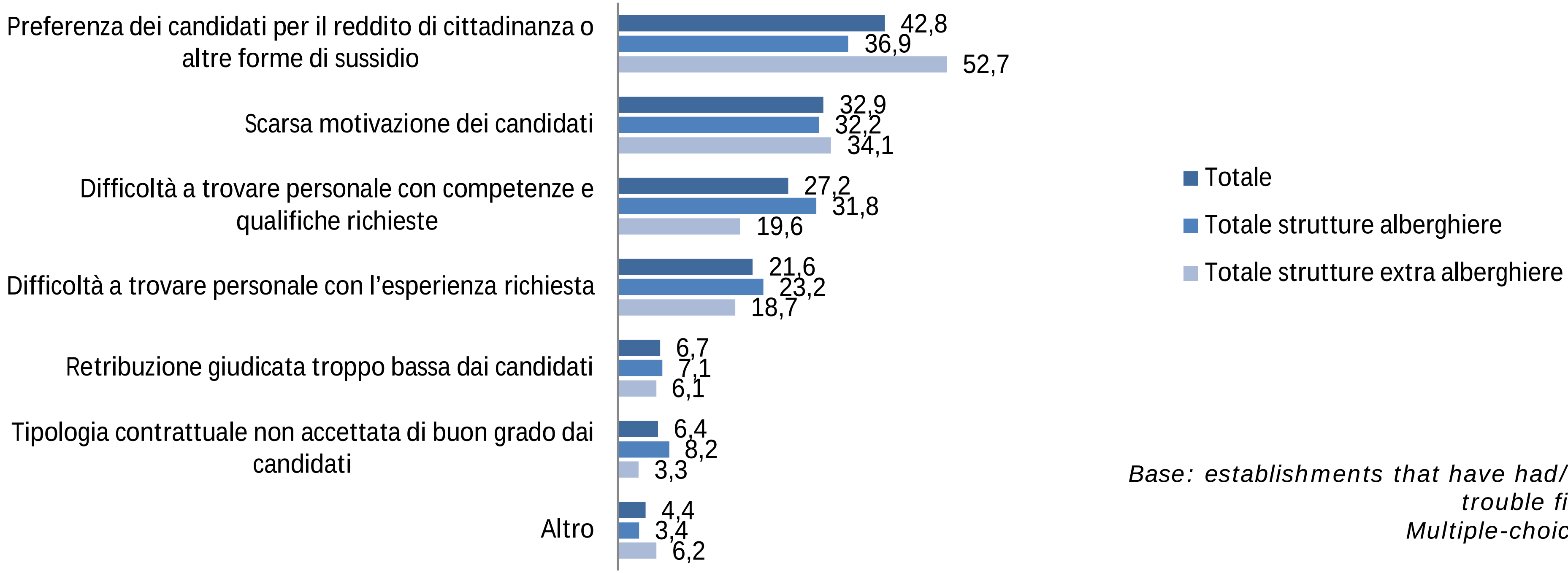
Reasons behind difficulties searching for staff for the summer season

June 2021
2nd wave

Why have you had/are you having trouble finding the qualified staff that you need?



Base: establishments that have had/are having trouble finding staff
Multiple-choice question

How to help members of the industry by promoting the recovery

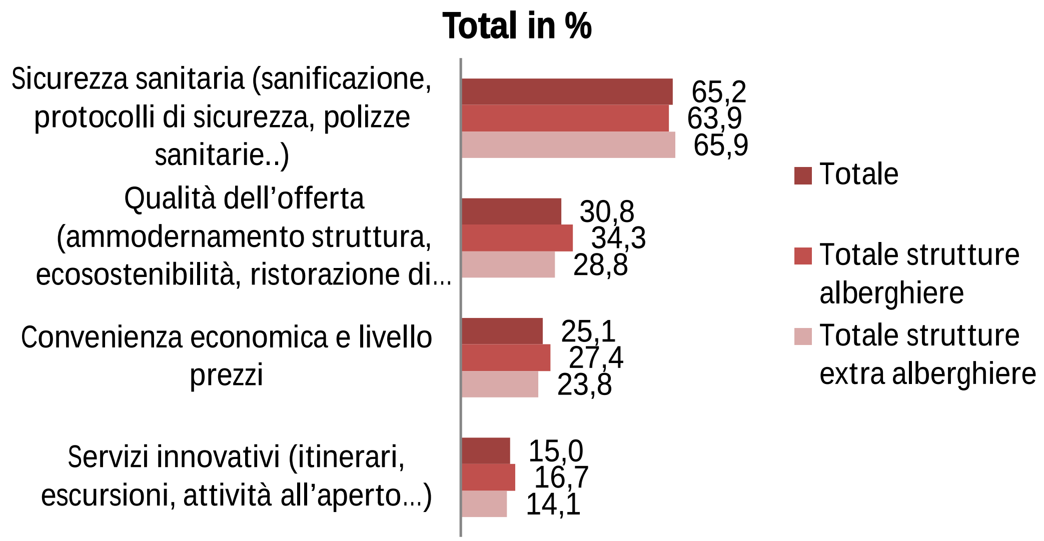
Aside from economic aid, what does your establishment need most in order to get your business back on its feet?

Sample as a whole in %

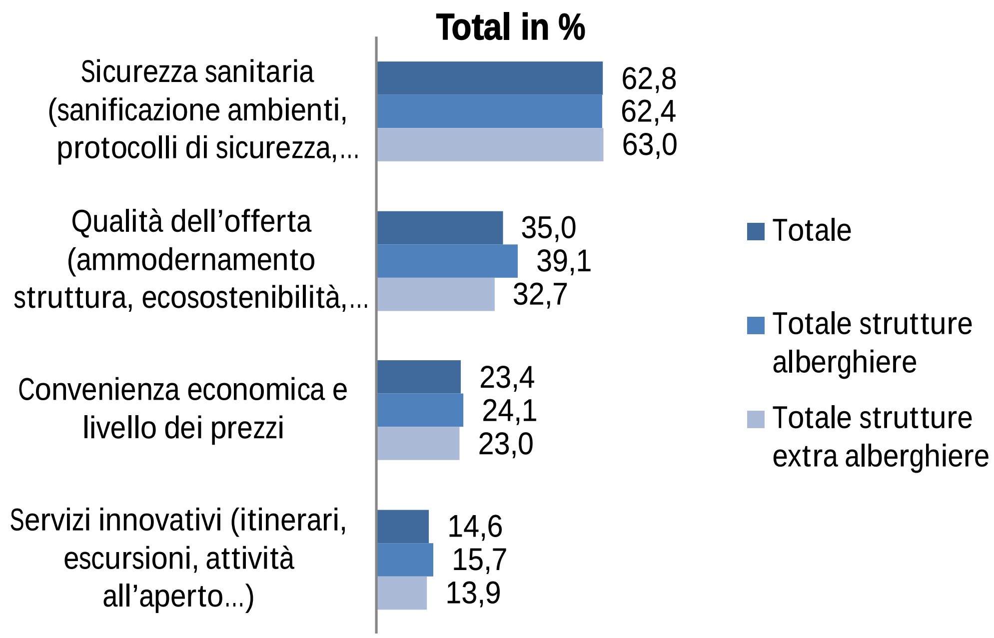
Tourist establishments and post-pandemic needs

With the summer season in mind, on what aspect is your establishment focusing in order to cater to the new needs stemming from the pandemic?

May 2021 - First wave



June 2021 - Second wave



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

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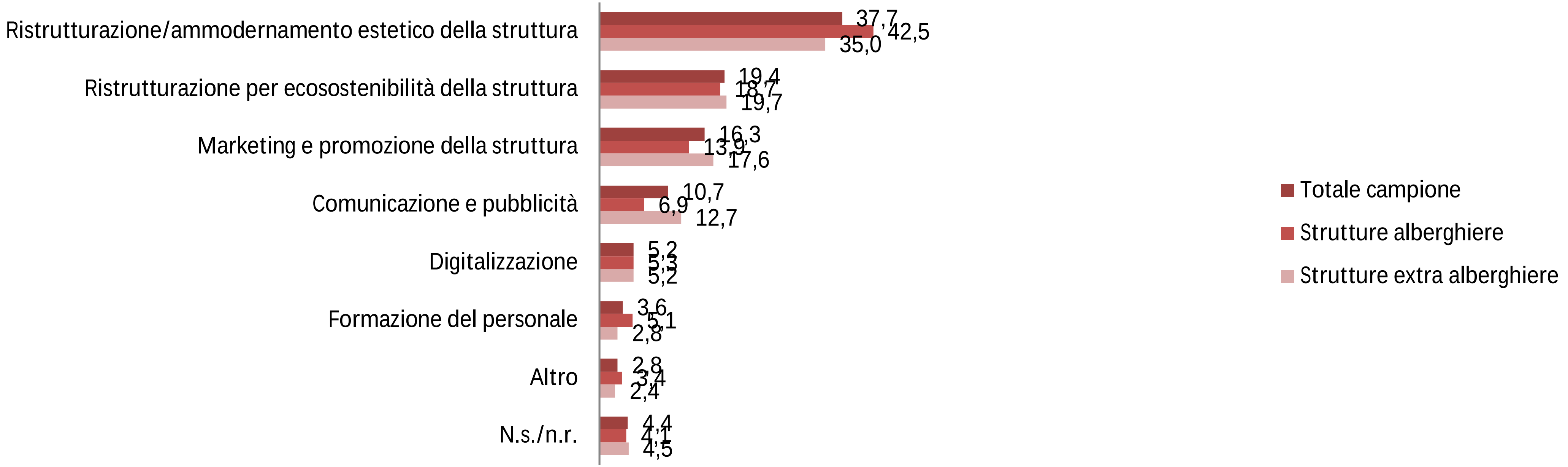
The priorities of tourist establishments

1ST WAVE May 2021

If you had access to a bonus to use on your establishment right now, what would you utilize it on?

Total in %



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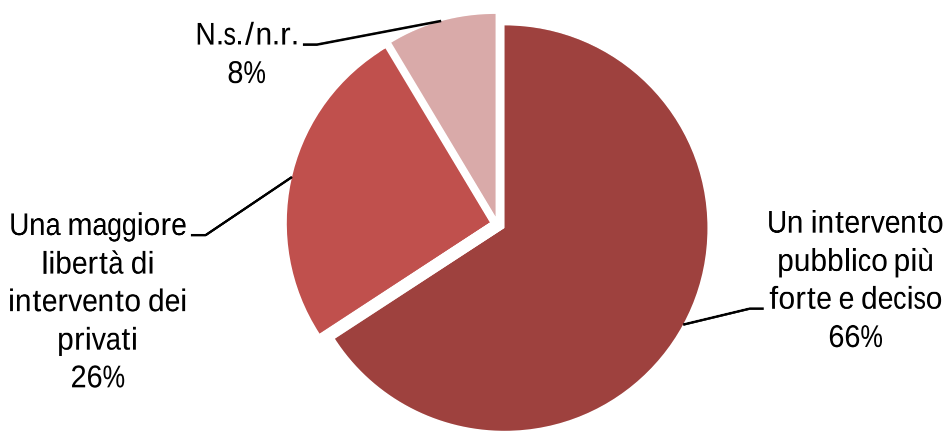
Tourist establishments and their expectations from public crisis-response measures

1ST WAVE May 2021

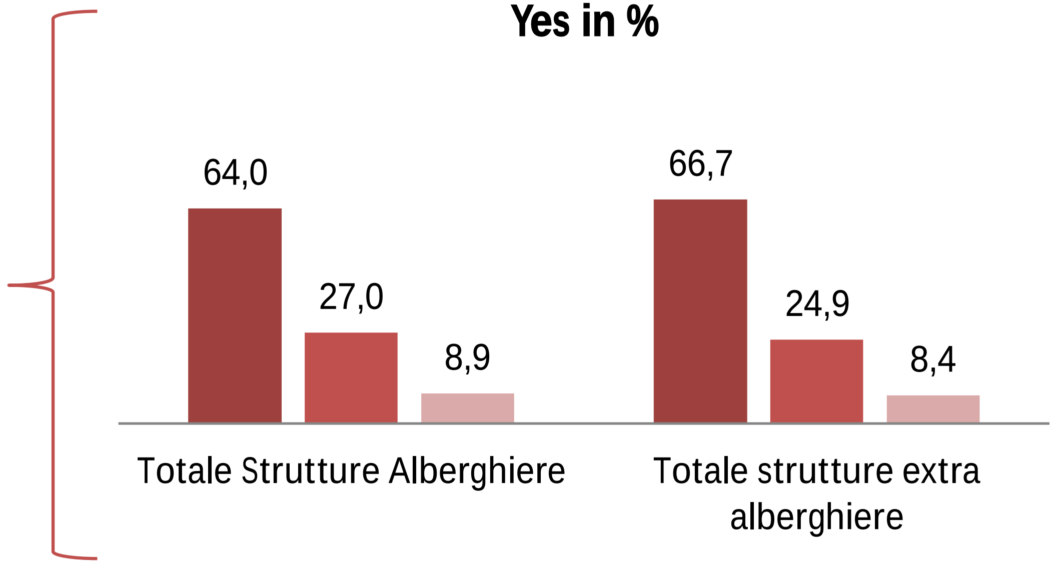
In order to face and overcome the current crisis, what do you think that businesses in your industry need?

Totale campione in %



TYPE OF ESTABLISHMENT

Yes in %



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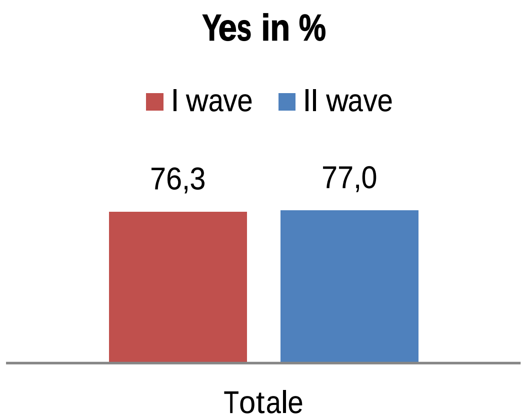
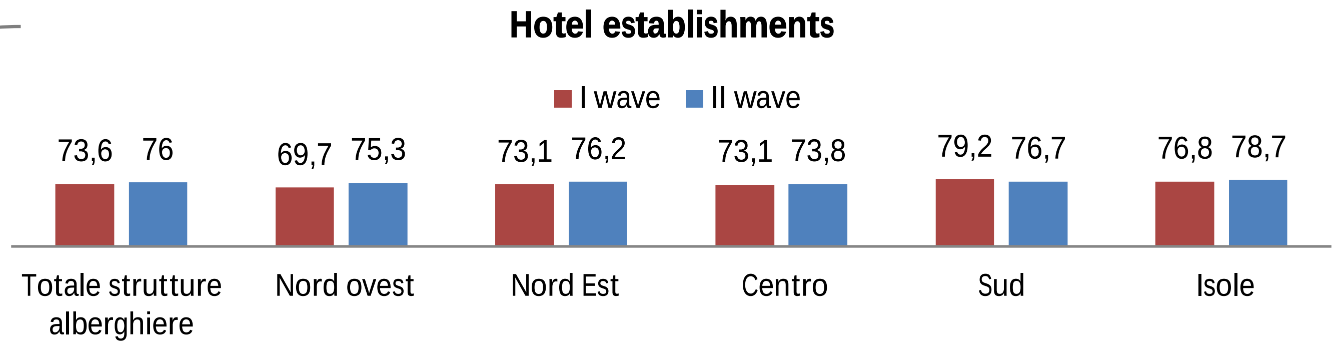
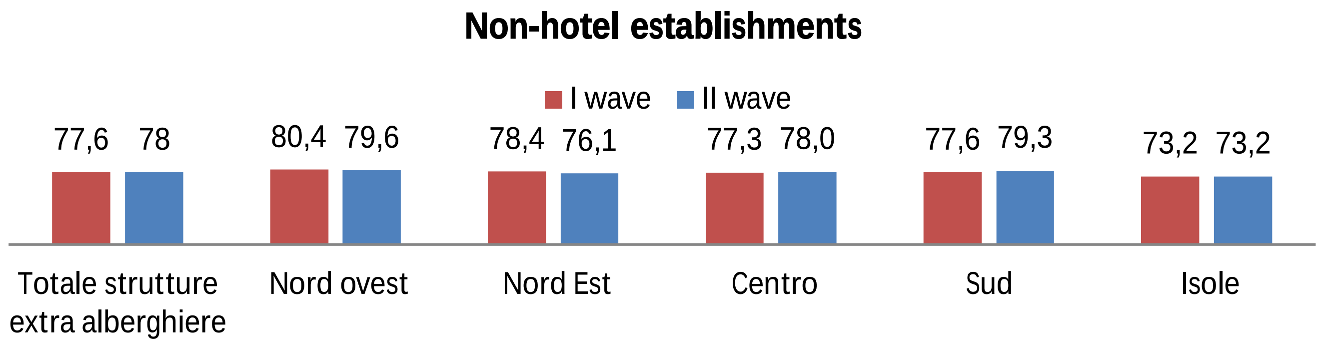
4. Prospects for the recovery: strengths to harness and level of confidence about the future

Confidence in growth in the tourist industry

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







Strengths of establishments in terms of tourist services

May 2021 - First wave

	Total in %	Hotel establishments	Non-hotel establishments
Family-friendly tourism	49.2	47.9	49.9
Nature tourism	46.6	40.8	49.7
Food and wine tourism	22.1	20.5	22.9
Cultural tourism	20.4	18.0	21.7
Slow tourism (cycling routes, walking, horse riding, etc.)	12.9	11.0	13.9
Sports tourism	12.6	17.7	9.9
Business tourism and travel	10.4	16.5	7.2
Youth tourism	8.1	7.6	8.3
"Made in Italy" tourism	7.9	7.7	8.0
Wellness tourism	7.3	11.1	5.3
Arts and entertainment tourism	4.1	4.2	4.1
Conference tourism	2.7	4.8	1.5
Other	2.0	1.8	2.2

June 2021 - Second

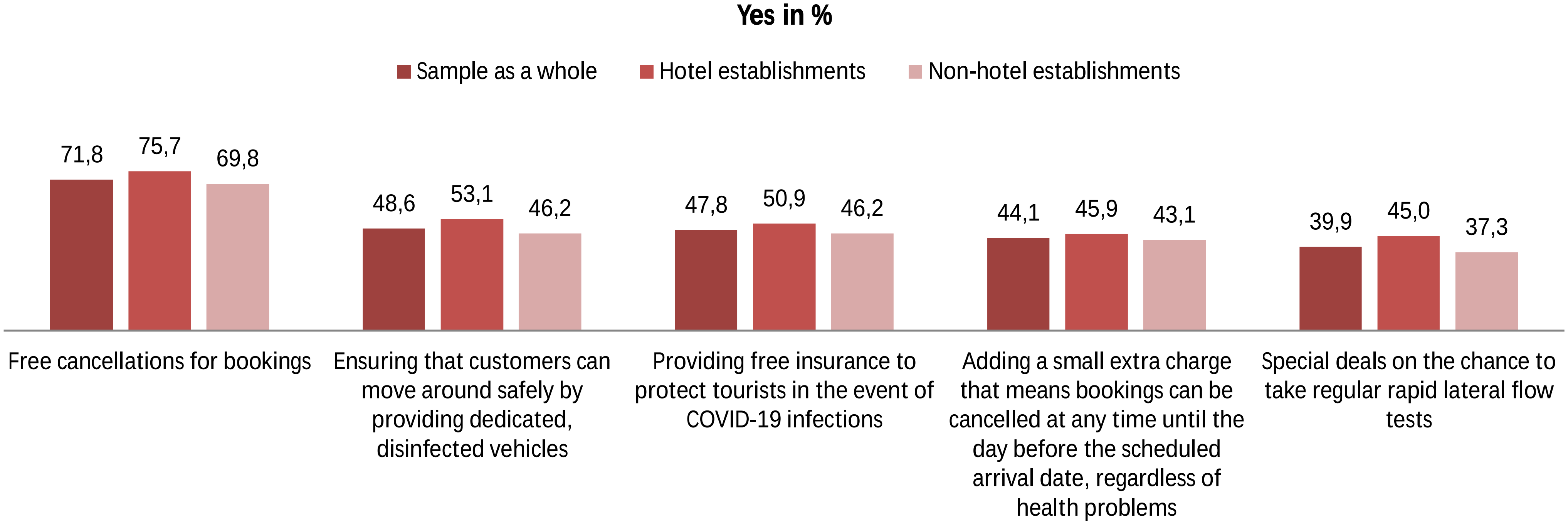
	Total in %	Hotel establishments	Non-hotel establishments
Nature tourism	46.2	38.1	50.5
Family-friendly tourism	43.5	41.3	44.6
Cultural tourism	23.2	19.5	25.2
Food and wine tourism	21.0	17.5	22.9
Slow tourism (cycling routes, walking, horse riding, etc.)	14.0	11.8	15.2
Beach tourism	12.3	13.0	12.0
Sports tourism	11.6	15.4	9.5
Business tourism and travel	9.2	14.6	6.3
"Made in Italy" tourism	6.8	6.1	7.1
Youth tourism	5.9	5.9	5.9
Wellness tourism	5.7	8.8	4.1
Arts and entertainment tourism	3.6	3.8	3.5
Conference tourism	2.1	4.0	1.0
Religious tourism	2.0	2.1	1.9
Health tourism	0.7	0.8	0.7
Other	1.1	1.2	1.1

Base: establishments that have not closed for good
Multiple-choice questions

Strategies for attracting customers during a pandemic

1ST WAVE May 2021

Which of the following approaches do you think could attract customers?



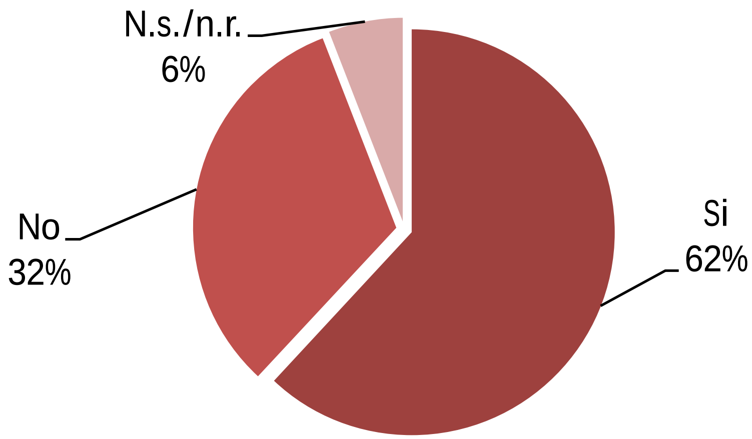
Remote workers and digital nomads: new target groups for tourist establishments?

1ST WAVE
May 2021

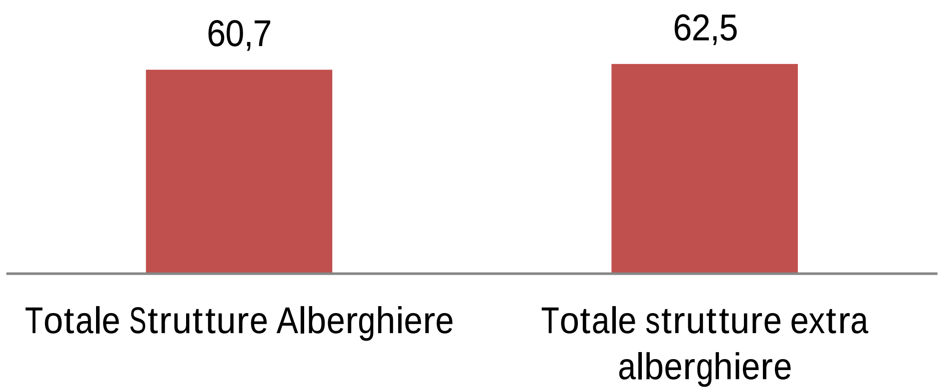
Some establishments are catering to the changing needs of customers by putting in place cutting-edge services and dedicated packages for tourists who have to work remotely while they are travelling. Could your establishment aim to harness this trend in the future?

TYPE OF ESTABLISHMENT

Totale campione in %



Yes in %



Which type of tourism will see growing demand?

May 2021 - First wave

Bearing in mind the changes that the public health emergency will bring, which type of tourism do you expect to grow in the future?

	Total in %	Hotel establishments	Non-hotel establishments
Family-friendly tourism	47.0	44.9	48.1
Nature tourism	46.9	41.4	49.9
Food and wine tourism	22.0	20.0	23.0
Cultural tourism	20.9	18.3	22.3
Slow tourism (cycling routes, walking, horse riding holidays, etc.)	13.4	11.6	14.3
Sports tourism	12.7	17.6	10.1
Business tourism and travel	10.3	16.4	7.0
“Made in Italy” tourism	9.5	9.5	9.5
Youth tourism	9.2	8.8	9.4
Wellness tourism	7.4	10.6	5.8
Arts and entertainment tourism	3.7	3.7	3.6
Conference tourism	3.0	5.8	1.6
Other	1.9	1.9	1.9

Capitalizing on local areas of excellence to boost tourist appeal

May 2021
1st wave

Which local area of excellence would you recommend capitalizing on today to boost tourist appeal?

	Total in %	North West	North East	Centre	South	Islands
Natural beauty - landscape	36.4	38.0	34.5	32.7	38.9	43.1
Cultural heritage	17.6	12.3	15.7	21.4	16.1	23.2
Outstanding local wine and food (cheese, deli meats, oil, etc.)	12.5	14.9	14.7	9.8	16.1	4.9
Fine dining and cuisine	8.1	5.8	8.3	10.3	6.4	8.2
Superior craftsmanship and items that are Made in Italy	5.1	5.1	4.1	6.4	2.5	8.1
Sport, exercise	3.9	6.6	5.8	2.8	1.6	1.8
Wellness (spa tourism, etc.)	3.5	3.7	3.8	5.3	2.0	0.6
Recreation and entertainment facilities and activities	3.4	4.4	3.4	3.4	2.8	2.8
Rediscovering traditional festivals and celebrations	3.3	2.4	3.5	2.0	6.5	2.7
Pilgrim walks, natural trails, etc.	2.8	2.7	2.5	3.6	2.6	2.0
Other	0.8	1.0	1.4	0.4	0.6	0.7
Nothing in particular	2.6	3.1	2.5	1.8	3.9	1.9
Total	100.0	100.0	100.0	100.0	100.0	100.0

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Final thoughts and ideas for the future

- 77% of the tourist business managers interviewed said that they were confident about the recovery of the tourism industry in Italy. This figure remains fairly stable throughout of the types of business (hotels and non-hotel establishments) and locations in Italy.
- Family-friendly tourism and nature tourism are the spheres on which members of the trade are counting the most. This is especially true of the managers of non-hotel establishments. Among the hotels, there is greater interest in sports tourism, business travellers and tourism based on beauty and wellness, which were also named as the areas on which to focus in the future.
- It is interesting to note the positive response to remote working and the idea of providing tourist establishments with the facilities required by remote workers. It is an idea that was deemed interesting by 62% of the members of the sample group and proved slightly more appealing to managers of non-hotel establishments than to those of hotels (62.5% and 60.7% respectively).


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