Survey into trends in the tourist accommodation sector

(3rd and 4th wave)

October 2021

Method

July 2021 - Third wave	October 2021 - Fourth 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: July 2021	Interviews conducted: October 2021

Tourist establishments interviewed as part of the sample

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

As with the previous surveys, with the third and fourth waves the research once again involved interviewing the managers of approximately 6000 tourist establishments (6007 in the July survey and 6000 in the October one), which included not only hotels but also other facilities all over Italy (the North West, North East, Centre, South and Islands).

July 2021 - Third 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 in Hotel Establishments	**2082**
Campsites - Holiday villages	178
Agritourism establishments	1240
Youth hostels, Holiday homes, Mountain huts, etc.	288
Bed and breakfasts	2219
Total in Non-Hotel Establishments	**3925**
Total	**6007**

October 2021 - Fourth 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 in Hotel Establishments	**2040**
Campsites - Holiday villages	174
Agritourism establishments	1237
Youth hostels, Holiday homes, Mountain huts, etc.	284
Bed and breakfasts	2265
Total in Non-Hotel Establishments	**3960**
Total	**6000**

1.
Looking back
at the summer season

Looking back at June-August/1

- As noted in the previous surveys, the average opening period for establishments 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. **As the summer season began, the percentage of establishments that were open began to increase. The figure went from 74.5% in June to more than 85% in July and August.**

- **The average occupancy rate in establishments went from approximately 60% to 30% during the public health emergency. This summer it returned to pre-pandemic levels, going from the 33% reported in June to 72.6% in August.**

- **In terms of the types of guests, between June and August there was an increase in the amount of couples, families and tourists travelling for pleasure, along with a slight fall in single travellers and business customers.**

- **The places of origin of visitors also saw changes in the summer months. Between July and August there was an increase in guests from other regions and countries, which went hand in hand with a drop in customers from the same or neighbouring regions. Looking at people from other countries in particular, the amount of visitors from Germany, France and the Netherlands increased but the number of tourists from Spain, the United States and the United Kingdom remained low.**

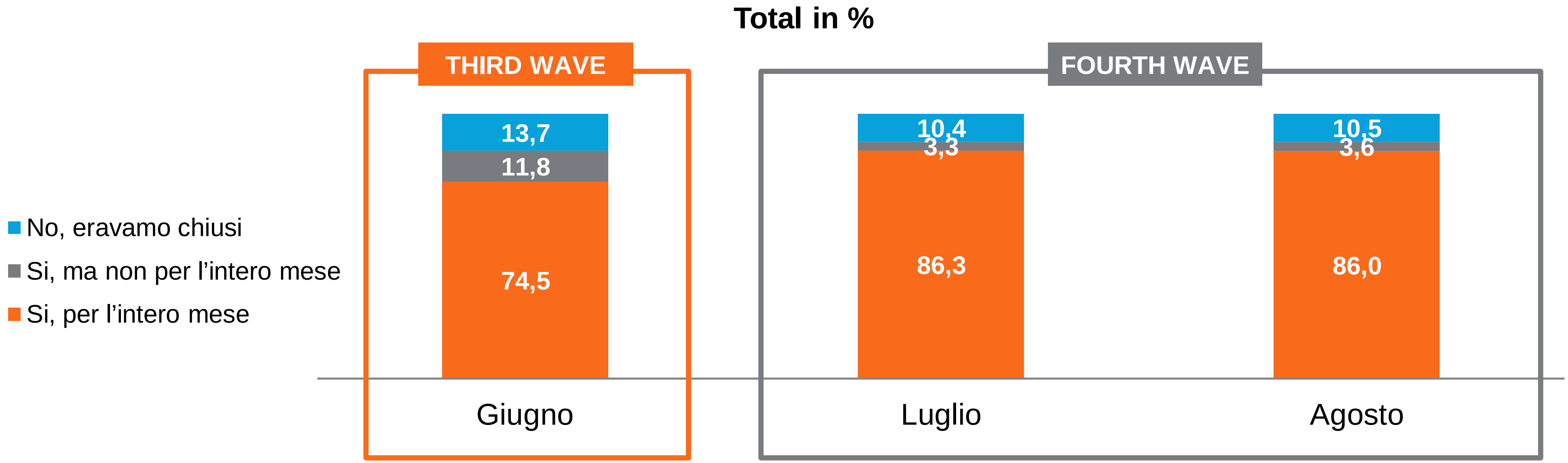
Looking back at June-August/2

- **The results achieved in terms of occupancy were in line with expectations for approximately half of the people interviewed. Some people saw worse results than predicted, while the expectations of others were exceeded. There were more of the latter, who made up approximately 30% of the sample group.**

- **In July and August, both the occupancy rate and the turnover were better than in the same period of the previous year for around half of the people interviewed. Despite the increased occupancy, the number of members of staff did not increase in approximately three quarters of establishments.**

Opening period of tourist establishments

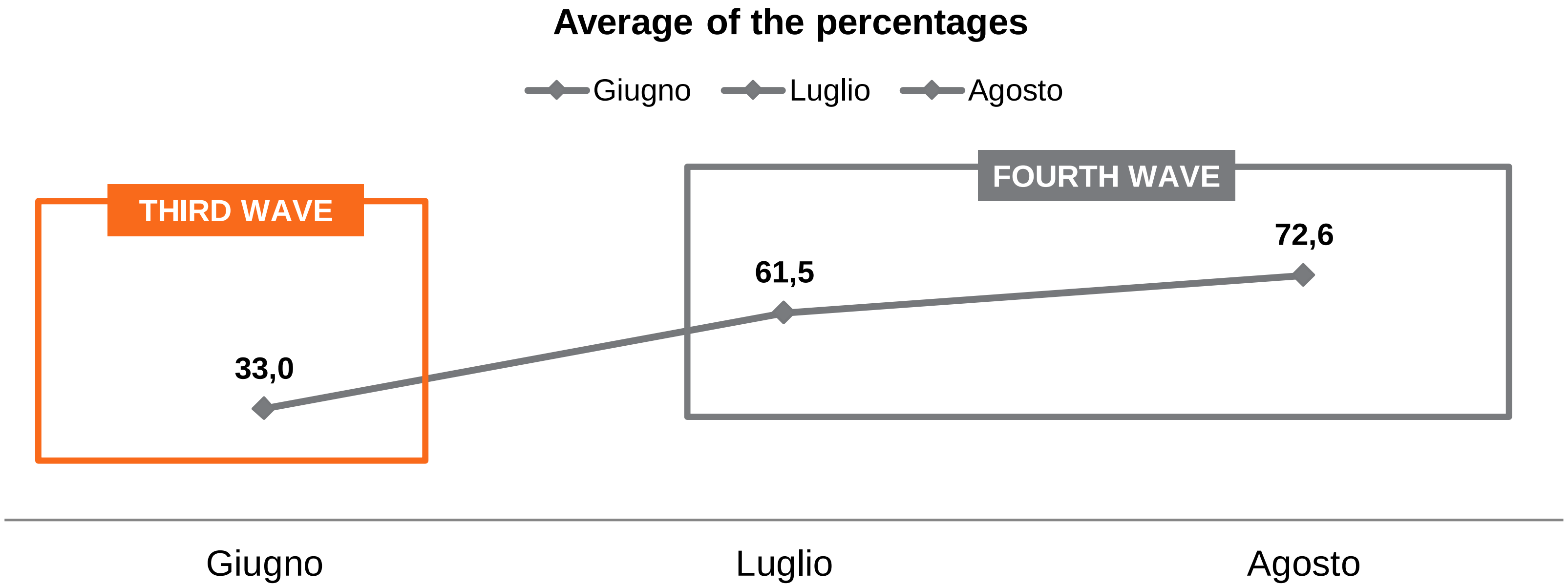
The establishment was open in the months of…



Base: establishments that are open, about to reopen or have not closed for good

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?



Base: establishments that were open at the times in question

Types of guests

What types of guests stayed at your establishment during the month?

	THIRD WAVE	FOURTH WAVE	
	June 2021	July 2021	August 2021
Couples/Families	72.6	81.6	81.5
Tourists/Leisure travellers	23.1	35.0	34.2
Single travellers	16.5	15.9	15.4
Business customers	13.7	8.7	7.7
Groups	6.4	7.9	6.9
Students/Schools	0.9	1.0	1.4
Conference attendees	0.7	0.9	1.0
Other	0.3	0.3	0.2

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

Places of origin of customers

In the month in question, where did the guests staying in your establishment come from?

	THIRD WAVE	FOURTH WAVE	
	June 2021	July 2021	August 2021
From the same region or a neighbouring region	72.8	65.7	65.8
From other regions of Italy	79.5	90.2	91.6
From other countries	29.8	53.1	55.4

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

Places of origin of foreign customers

3RD WAVE

	June 2021
Germany	73.7
France	30.5
Austria	21.7
Switzerland	21.3
Netherlands	14.0
Belgium	10.8
United States	3.6
United Kingdom	3.2
Other countries	18.9

4TH WAVE

	July 2021	August 2021
Germany	79.2	78.6
France	39.1	42.6
Netherlands	23.3	22.4
Switzerland	21.4	17.5
Belgium	16.5	15.8
Austria	14.8	14.4
Spain	3.4	2.9
United Kingdom	3.0	3.2
Other countries	14.6	16.5

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

Occupancy rate

In the months in question, how was the occupancy rate in your establishment compared to your expectations?

	FOURTH WAVE	
	July 2021	**August 2021**
Higher than expected	26.3	31.7
In line with expectations	45.2	49.8
Lower than expected	27.8	17.7
Don’t know/No answer	0.7	0.8
Total	**100.0**	**100.0**

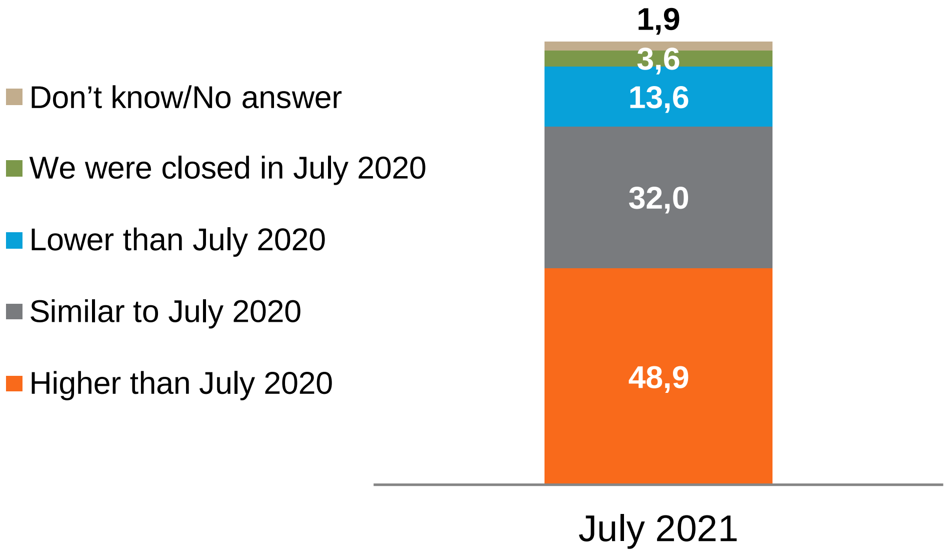
Base: establishments that had customers in the period in question

Occupancy rate compared to last year

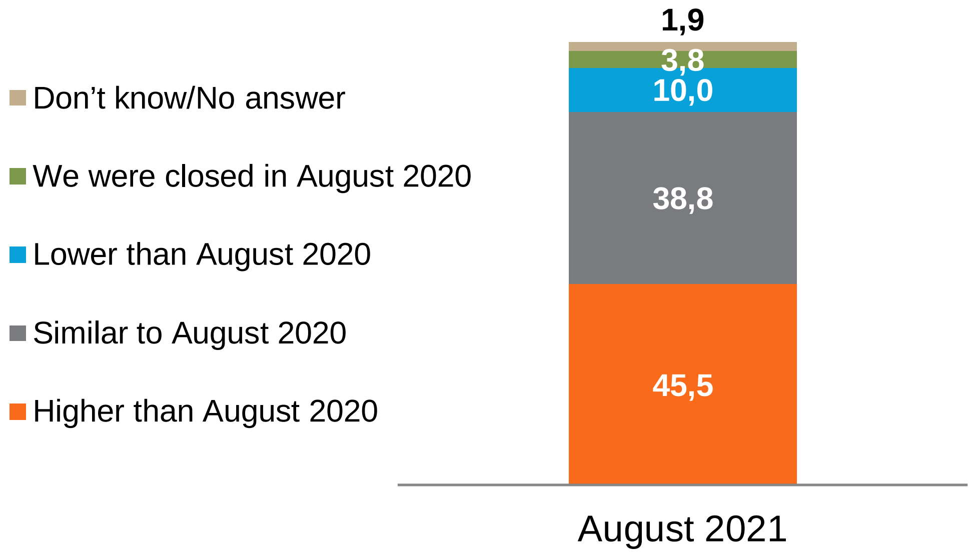
FOURTH WAVE

How did the occupancy rate in your establishment in July and August 2021 compare to the same months last year?

Total in %



Total in %



Base: establishments that were open in July and August

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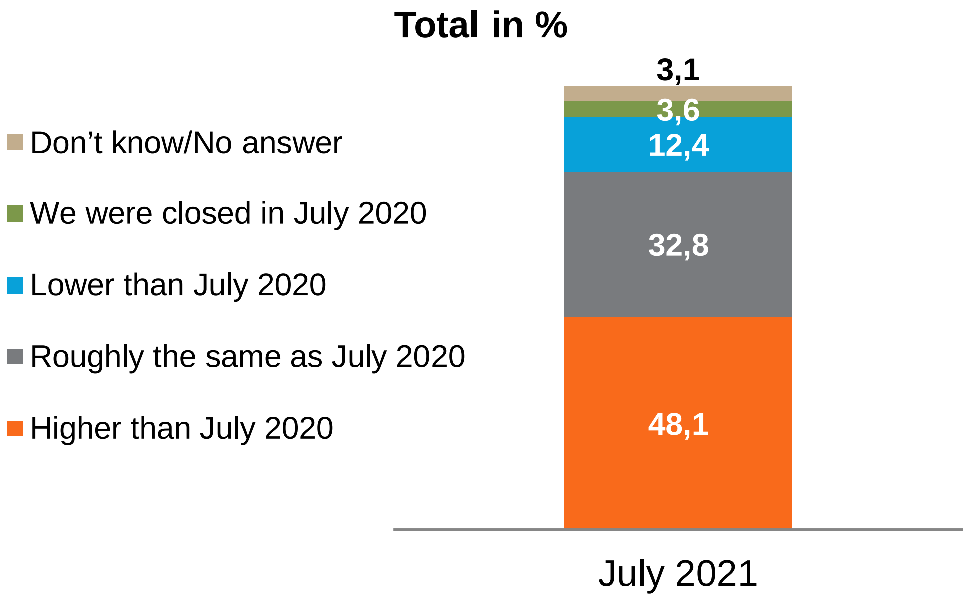
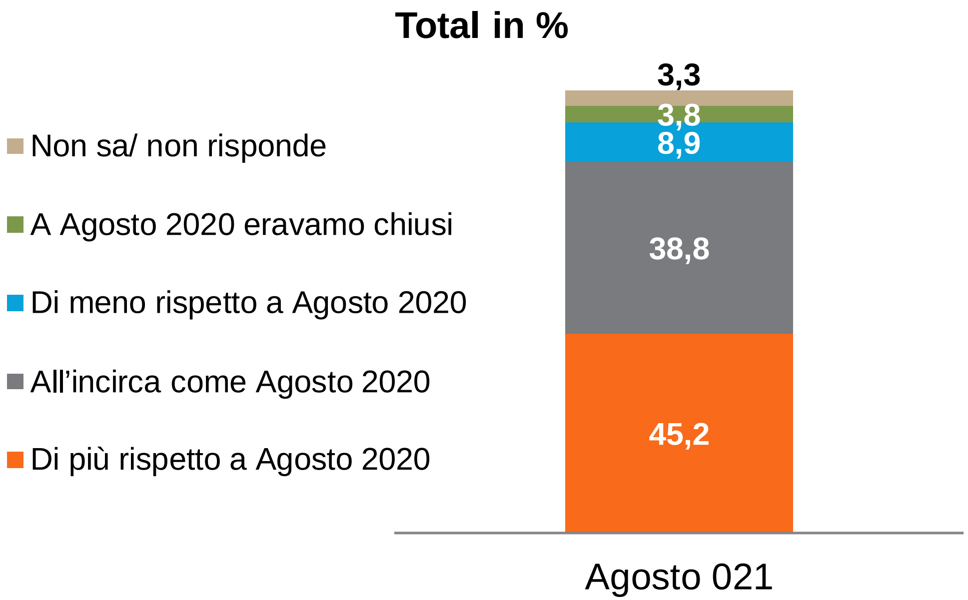
Turnover compared to last year

FOURTH WAVE

In July and August 2021, how did your establishment's turnover compare to the same months last year?



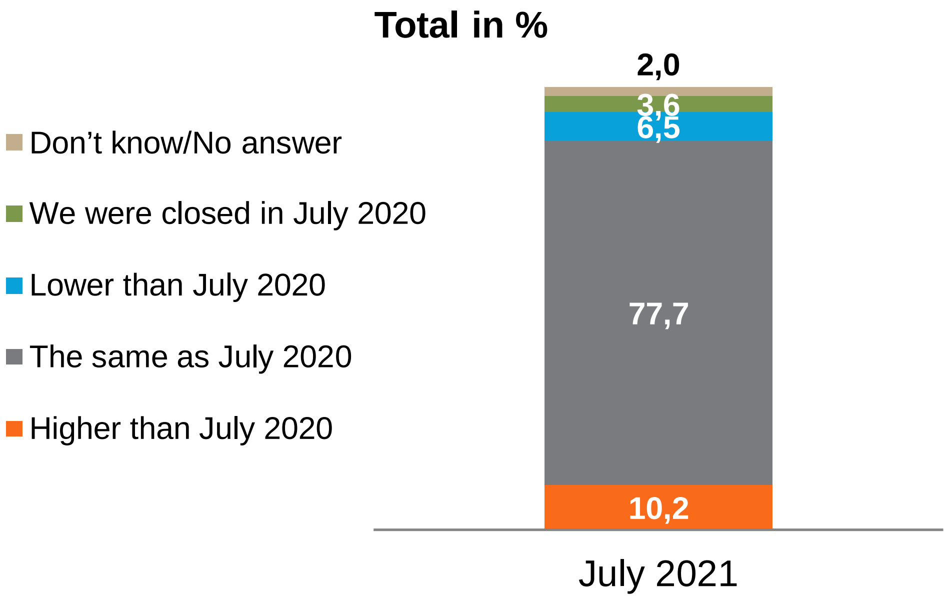


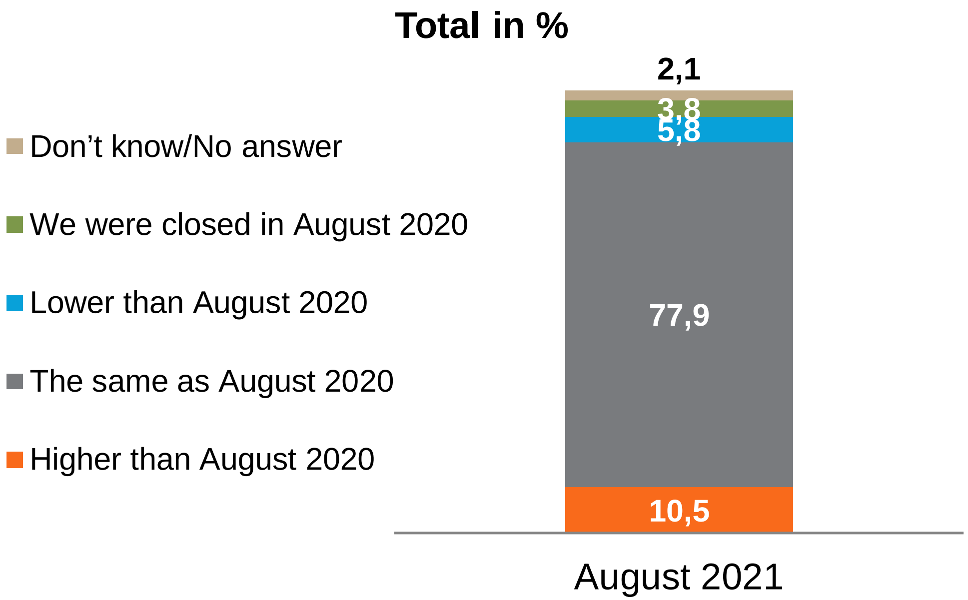
Base: establishments that were open in July and August

Number of members of staff compared to last year

FOURTH WAVE

In July and August, how did the number of permanent employees and other members of staff at your establishment compare to the same period last year?





Base: establishments that were open in July and August

Looking back at September

- **In September, the occupancy rate in hotels stood at 56%. It was slightly lower in non-hotel establishments, at just under 50%.**

- **As in the previous months, couples and families were the main types of guests. They tended to prefer non-hotel establishments, whereas tourists were more likely to opt for more traditional hotels.**

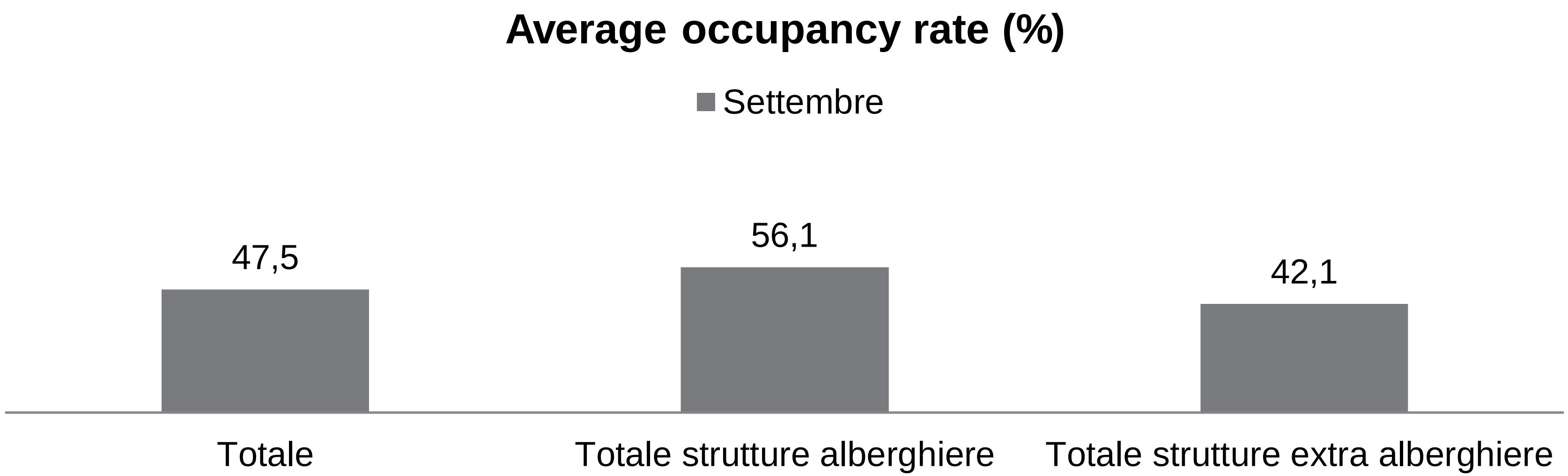
- **Once again the majority of guests were from Italy in the period in question, although they were now more likely to have travelled from other regions of the country. Approximately 50% of customers were from other countries. These foreign guests seem to prefer to stay in hotels rather than non-hotel establishments. In September, the highest numbers of foreign guests were once again from Germany and France.**

- **More than 70% of the members of the trade interviewed were in favour of making COVID passes compulsory for all guests. The vast majority of the people interviewed said that they had been unaffected by initial uncertainty about whether COVID passes would be compulsory for guests. However, 14% of them reported a loss of earnings due to last-minute cancellations.**

Occupancy rate of tourist establishments in September in %

FOURTH WAVE

As a percentage (taking into account the days when it was open), what was the actual occupancy rate of your establishment in September?



Base: establishments that were open in September

Types of guests in September

FOURTH WAVE

What types of guests stayed at your establishment in September?

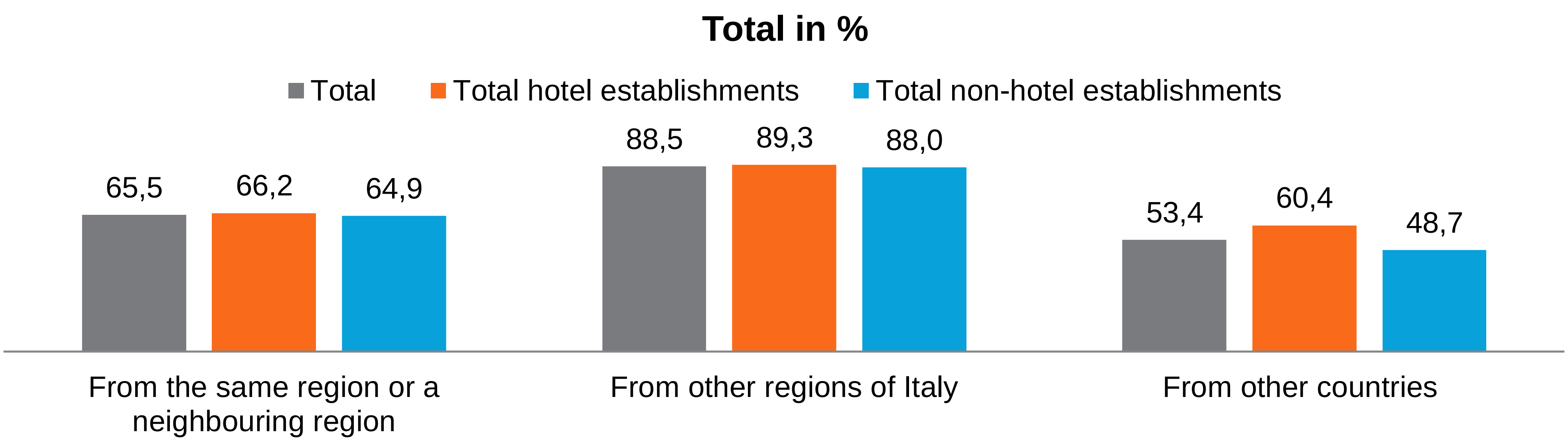
	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	72.6	66.2	82.9
Tourists/Leisure travellers	30.9	37.4	25.3
Business customers	16.9	24.6	8.8
Single travellers	15.9	18.2	6.6
Groups	7.1	8.8	5.7
Conference attendees	2.1	3.3	0.9
Students/Schools	1.2	1.1	0.6
Other	0.1	0.3	0.8
Don't know/No answer	0.6	0.6	0.5

Multiple-choice question
Base: open establishments that had customers in September

Places of origin of guests in September

FOURTH WAVE

In September, where did the guests staying in your establishment come from?



Base: open establishments that had customers in September
Multiple-choice question

Places of origin of foreign customers in September

FOURTH WAVE

What were the main countries of origin of foreign customers in September?

	Total in %	Hotel establishments	Non-hotel establishments
Germany	79.5	79.1	79.8
France	38.9	42.0	36.4
Netherlands	17.7	11.7	22.6
Switzerland	17.4	20.1	15.1
Austria	15.5	21.8	10.3
Belgium	13.4	12.8	14.0
Other	25.1	26.8	23.7

Base: open establishments that had foreign customers in September
Multiple-choice question

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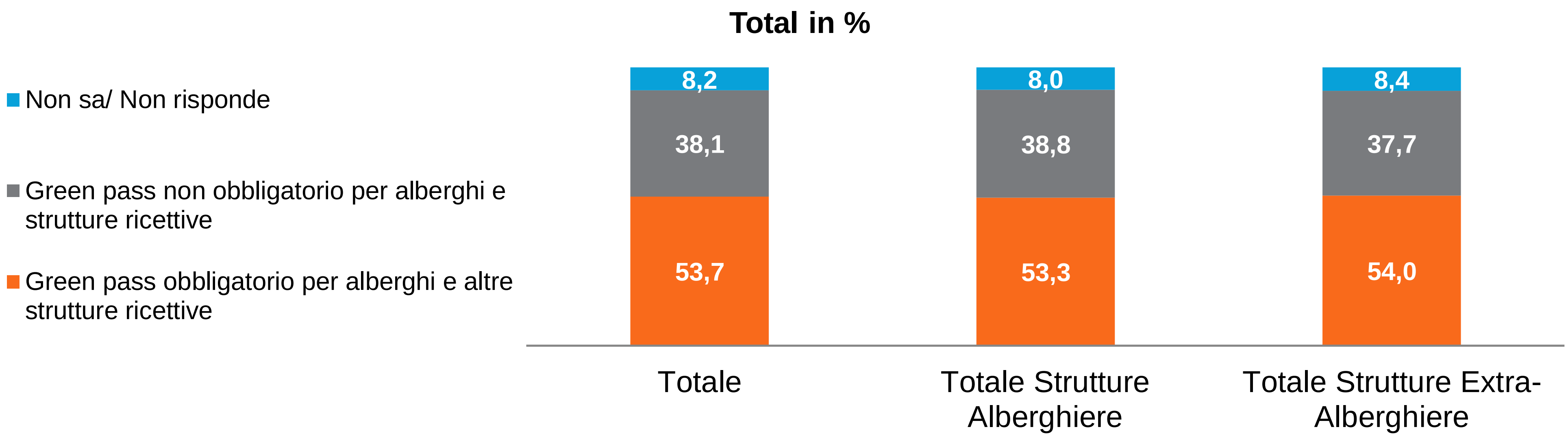
Should COVID passes be compulsory?

FOURTH WAVE

Some members of the tourism industry wanted COVID passes to be compulsory for hotels and other accommodation facilities, while others preferred for them not to be compulsory. Which position do you agree with most?



Base: establishments that are open, about to reopen or have not closed for good

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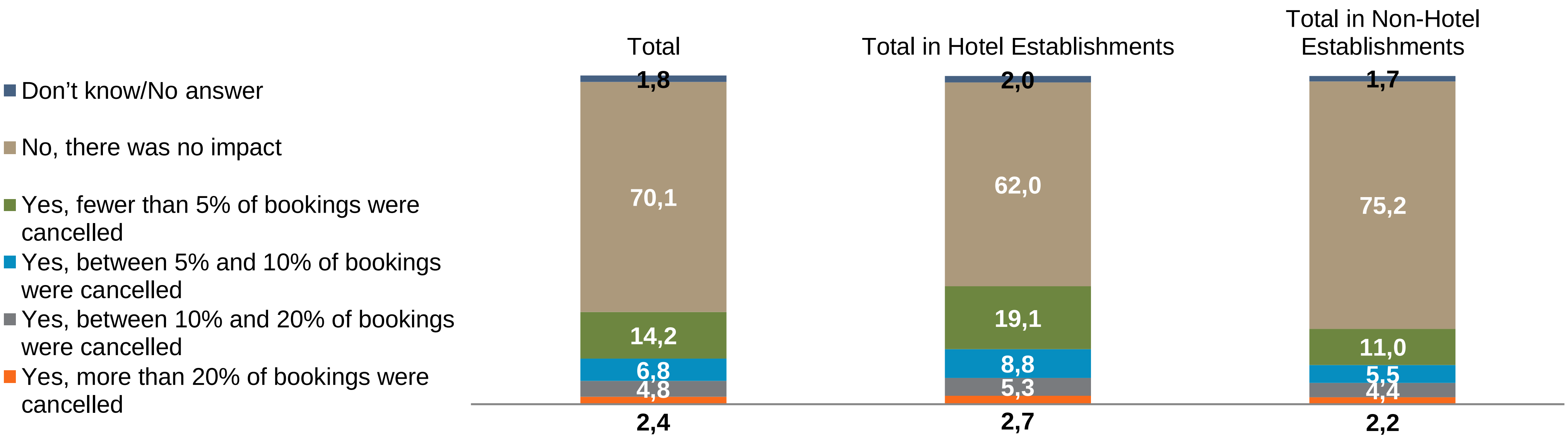
Impact of the uncertainty about the introduction of COVID passes for tourist establishments

FOURTH WAVE

In August 2021, did you have cancellations caused by the initial uncertainty about whether COVID passes would be compulsory in hotels and accommodation facilities? If so, how many?



Base: establishments that were open in August

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2.
Predictions for the coming months

Predictions for the coming months

- **According to the interviews, bookings currently stand at approximately 40% in October, 14% in November and December, and 7% for the period from January to March next year. Hotels seem to be doing slightly better than non-hotel establishments. As for the occupancy rate, the establishments stated that at present it stands at approximately 33% in October and 28% in the coming months. There are no major differences between hotels and non-hotel establishments.**

- **Once again, the guests making the most bookings were couples and families. It is interesting to note that these target customers tend to prefer non-hotel establishments, whereas tourists and business customers continue to show more of a preference for hotels.**

- **The majority of these bookings come from Italy, especially other regions of the country (more than 80%). The estimated proportion of foreign guests stands at approximately 45%. The highest number of foreign bookings continues to come from Germany, followed by France.**

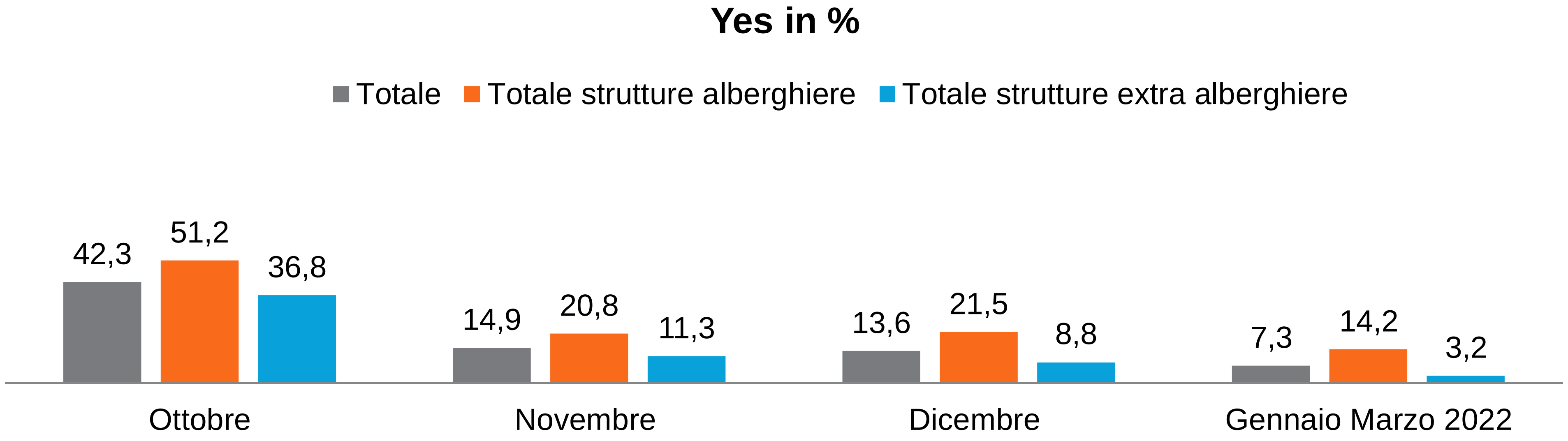
- **On average, the people interviewed predicted occupancy rates in their establishments of approximately 25% in November and December, then just under 20% at the start of next year. There was a slightly more optimistic outlook among the managers of hotels, whose estimated occupancy rates were a little higher than those of non-hotel establishments.**

- **The main way of booking was through direct contact, followed by OTAs and then the websites or social media accounts of the establishments. Non-hotel establishments tend to take advantage of the web a little more.**

Bookings at tourist establishments in the coming months

FOURTH WAVE

The establishment currently has bookings for...

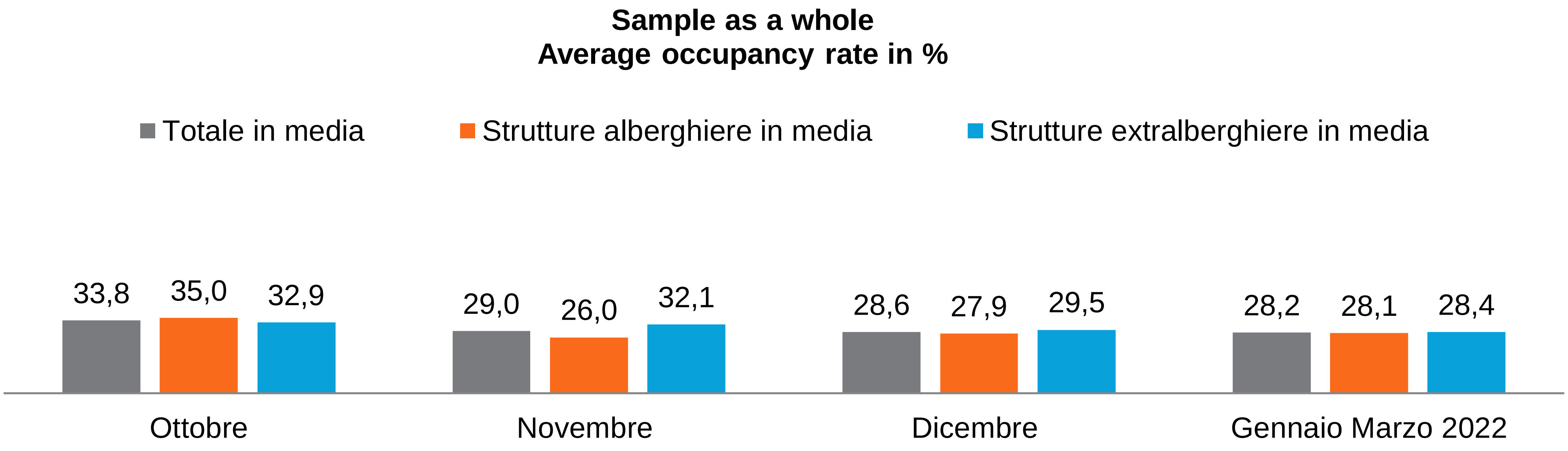


Base: establishments that are open or about to reopen

Estimate of the occupancy rate of tourist establishments in the coming months

FOURTH WAVE

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



Base: establishments that are open or about to reopen

Types of guests that are booking for the coming months

FOURTH WAVE

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

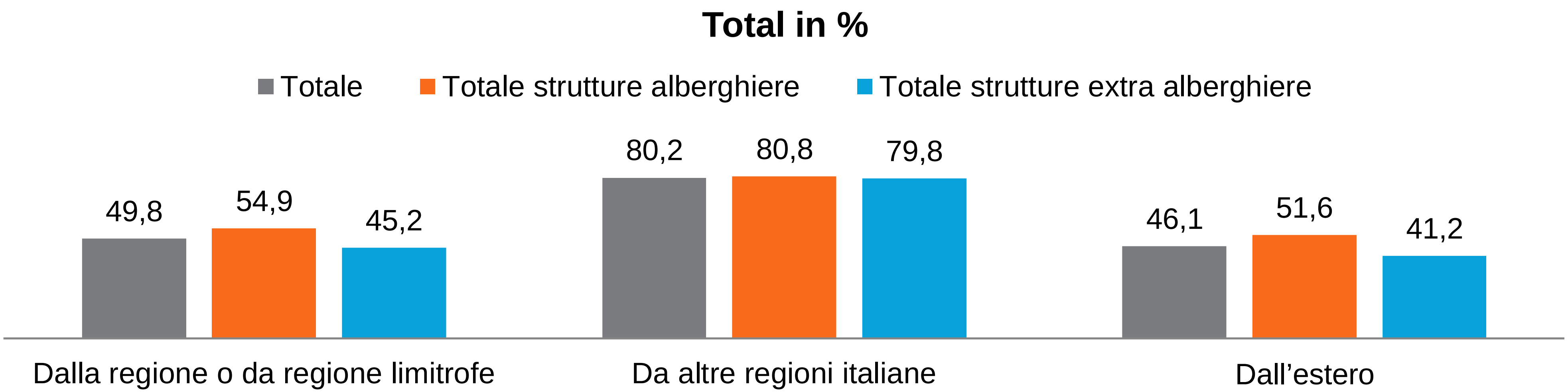
	Total in %	Total hotel establishments	Total non-hotel establishments
Couples/Families	67.2	59.7	73.8
Tourists/Leisure travellers	26.1	32.3	20.7
Business customers	19.0	26.3	12.5
Single travellers	14.1	16.8	11.7
Groups	9.5	11.7	7.5
Conference attendees	1.7	2.0	1.4
Students/Schools	1.2	1.5	0.9
Other	0.2	0.5	0.0
Don’t know/No answer	1.2	0.7	1.6

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

Origin of bookings for the coming months

FOURTH WAVE

Where are most bookings coming from?



Base: establishments that stated they are receiving bookings

Origin of bookings by foreign customers

FOURTH WAVE

Which foreign countries are bookings coming from?

	Total in %	Hotel establishments	Non-hotel establishments
Germany	74.0	74.9	73.0
France	40.1	42.4	37.4
Switzerland	15.1	17.5	12.4
Belgium	13.9	12.4	15.5
Austria	13.8	20.2	6.8
Netherlands	13.2	6.5	20.6
United States	6.0	5.8	6.2
Poland	5.4	7.2	3.5
Other countries	19.9	25.2	14.1

Base: establishments that stated they are receiving bookings from foreign customers

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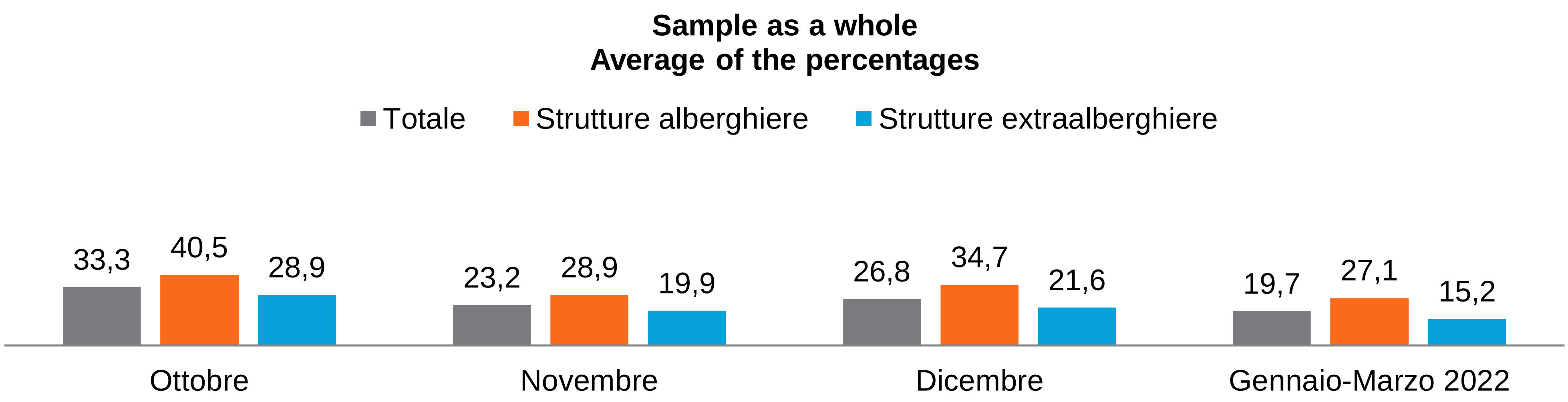
Predicted occupancy rates in the coming months

FOURTH 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?

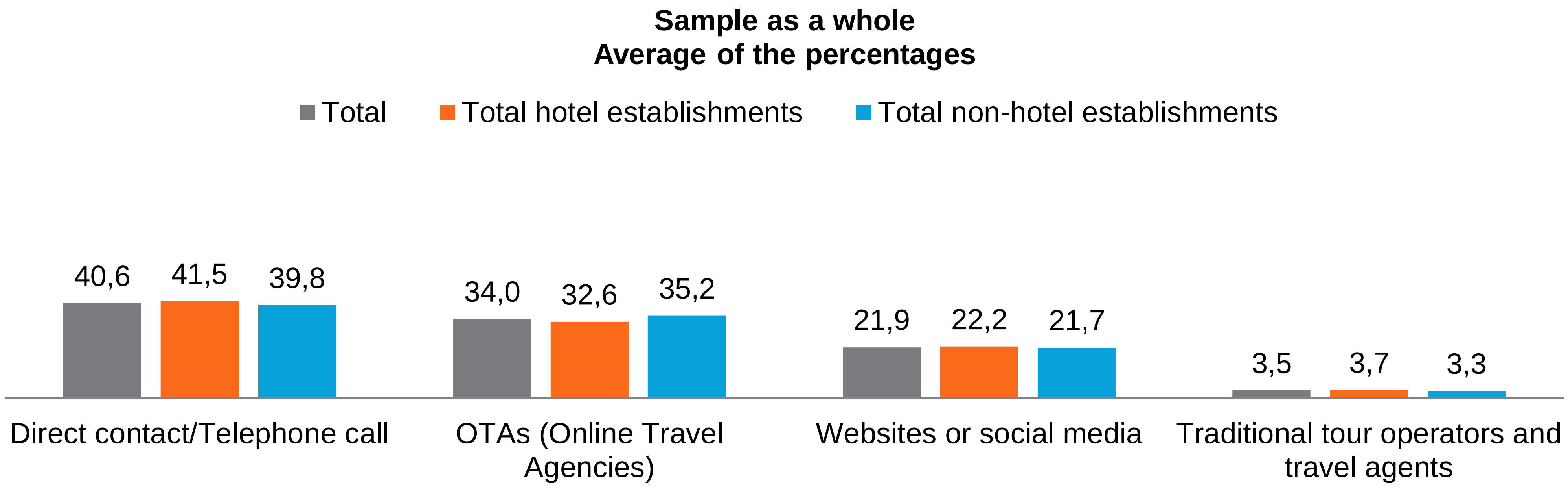


Base: establishments that stated they are open in the months in question

Booking channels

FOURTH WAVE

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



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

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3.
Customers with special needs at tourist establishments

Hosting customers with special needs

- **During the summer, 18% of establishments hosted people with special needs. Guests of this kind were more likely to stay in hotels than non-hotel establishments and they tended to be in the North rather than the rest of the peninsula.**

- **37.5% of the establishments interviewed reported that they hosted families with children this summer. 15.5% had elderly guests and approximately 5% had guests with disabilities of various kinds. In addition, an average of approximately 3% of the customers of the sample group fell into the category of “social tourism”.**

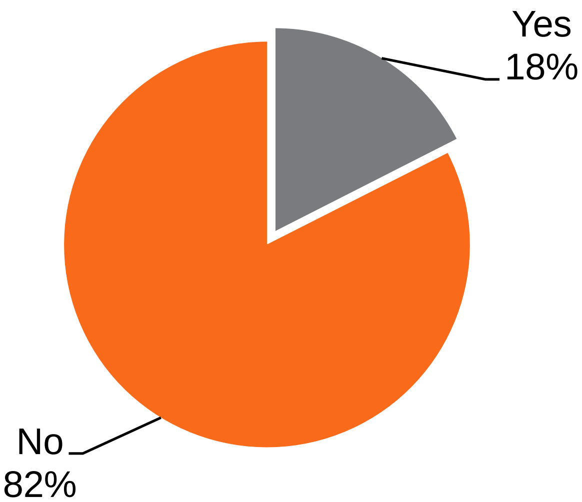
- **A look into the capacity of the establishments interviewed to cater to the special needs of their customers revealed that just under half of them currently provide dedicated services for people with coeliac disease and allergies. Most significantly, roughly the same amount stated that they were committed to making their services accessible and providing transparent information about the features and services offered by their establishments.**

Establishments that had disabled guests in the summer months

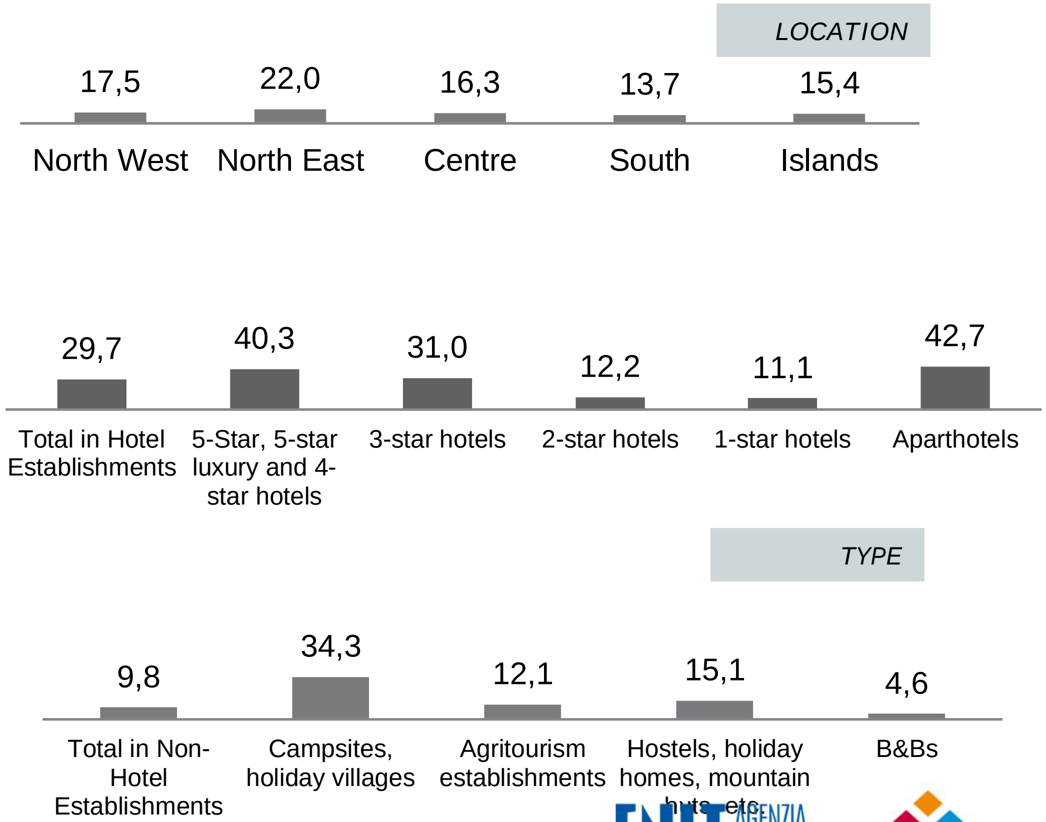
FOURTH WAVE

During the summer, did your establishment have any disabled guests?

Sample as a whole in %



% that hosted disabled customers



Base: open establishments that had customers in July and/or August

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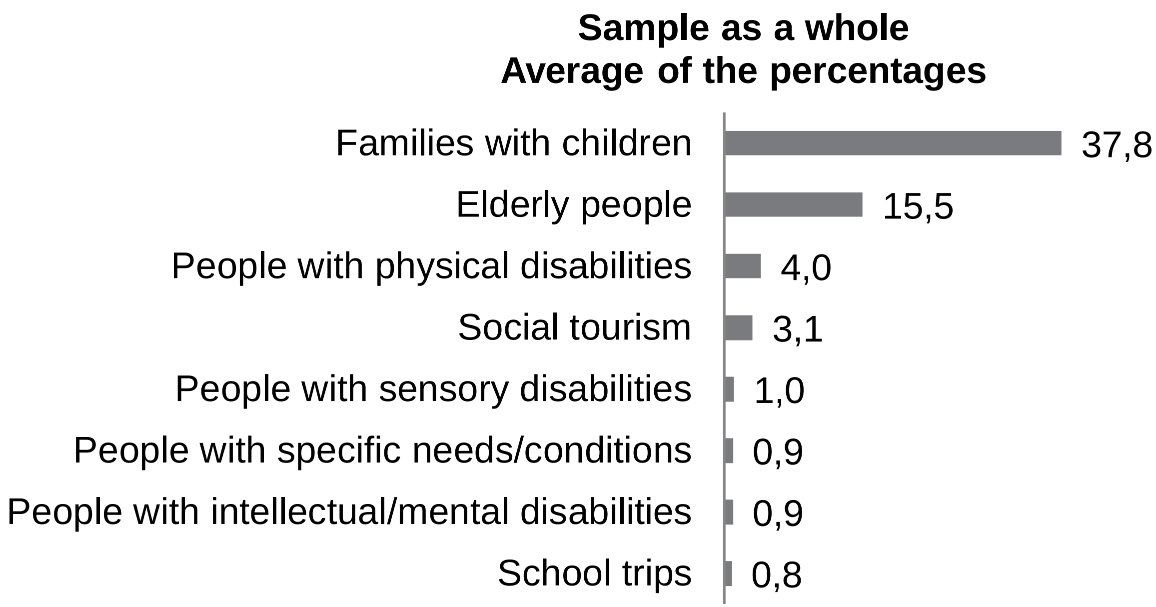
The ability of tourist establishments to cater to customers with special needs/1

FOURTH WAVE

In summer 2021, what percentage of all of your customers fell into the following categories?

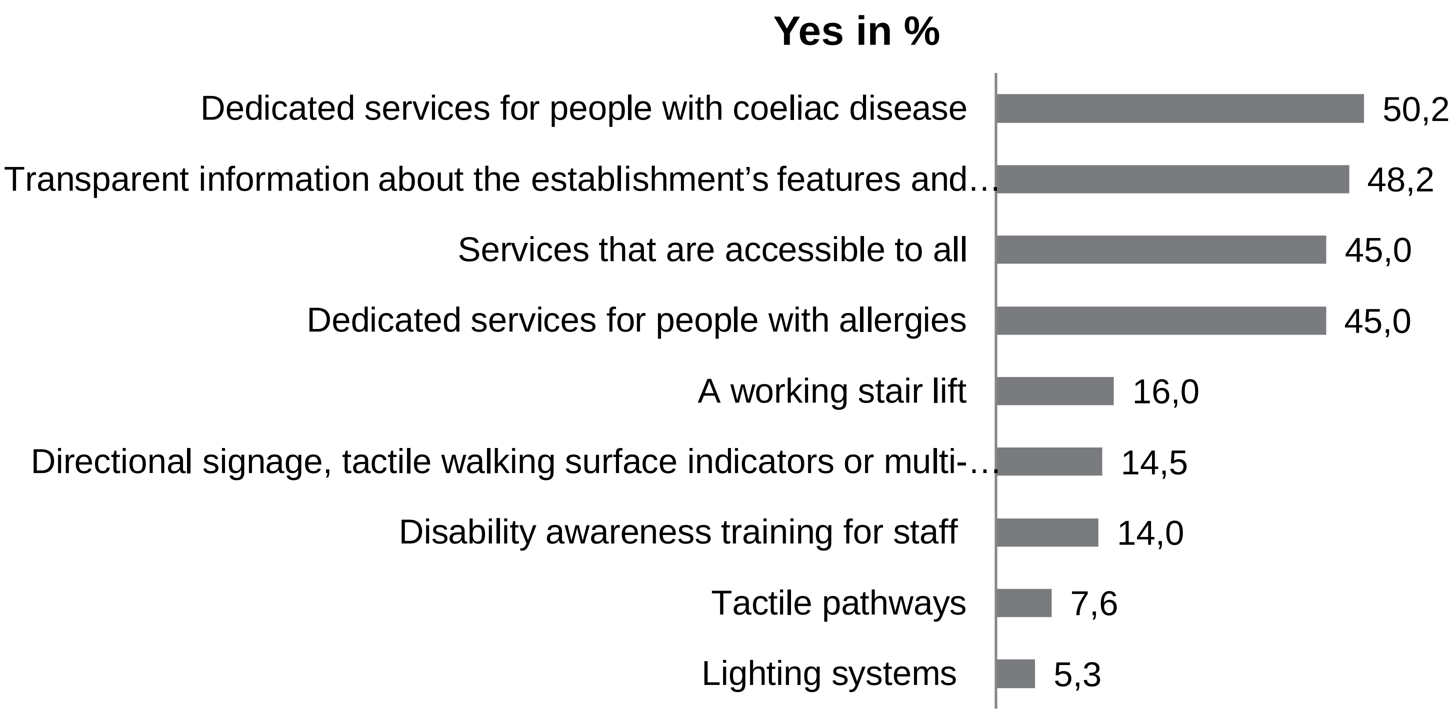


Base: open establishments that had customers in July and/or August

The ability of tourist establishments to cater to customers with special needs/2

FOURTH WAVE

In general, which of the following can your establishment provide?



Base: establishments that are open, about to reopen or have not closed for good
Multiple-choice question

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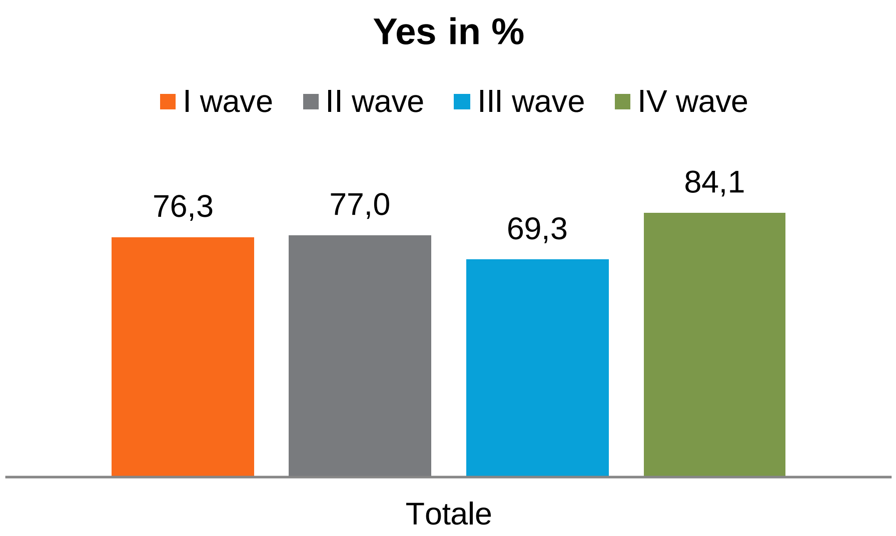
4.
Confidence in the recovery

Confidence in bouncing back

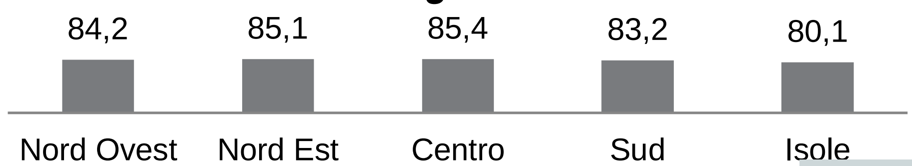
FOURTH WAVE

Right now, do you feel confident about the recovery of the tourism industry in Italy?

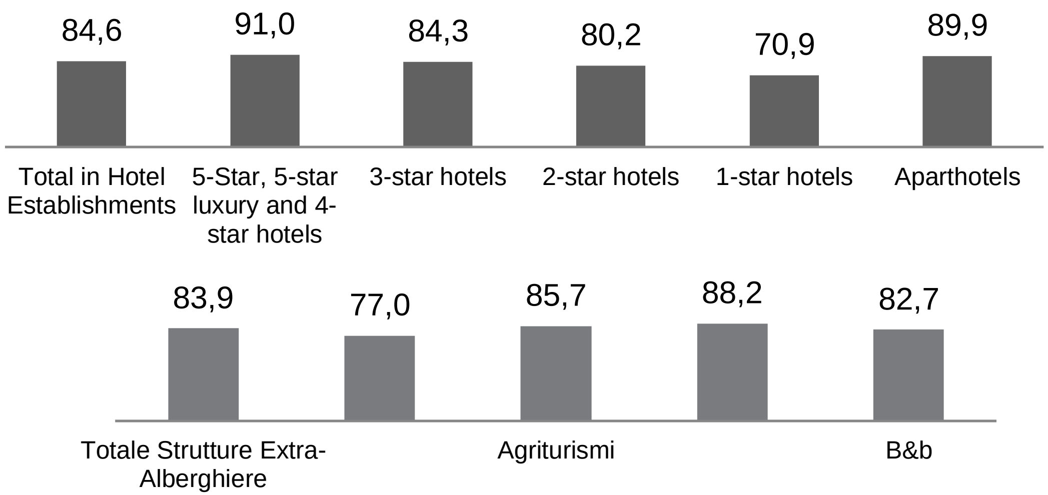


October 2021
% feeling confident

LOCATION



TYPE

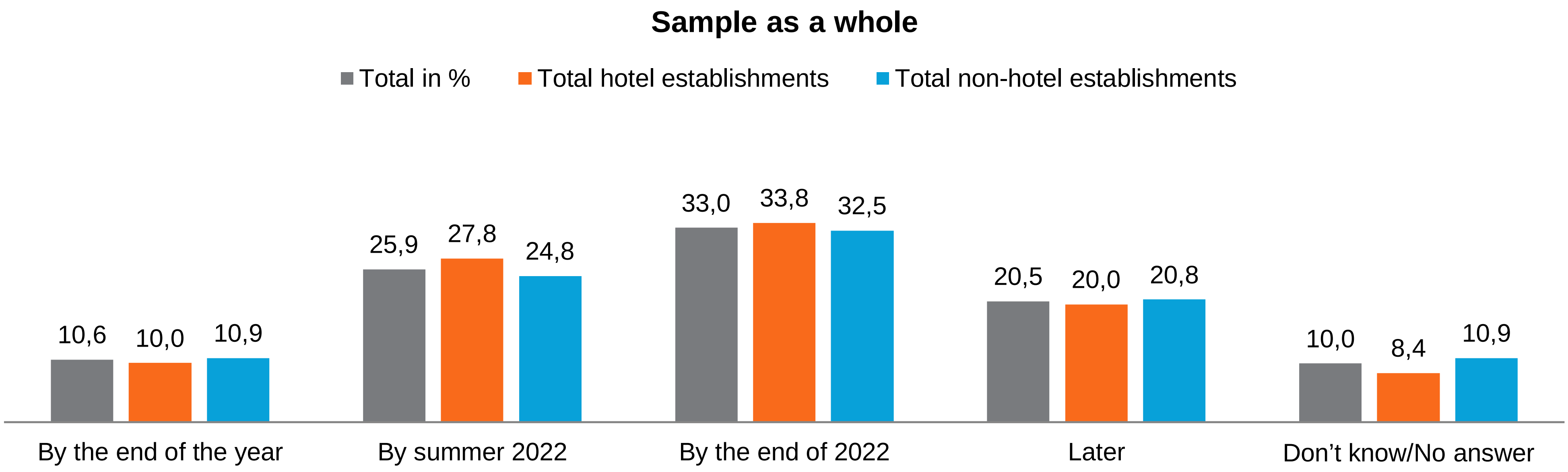


Base: establishments that are open, about to reopen or have not closed for good

Estimating how long it will take for the emergency to end

FOURTH WAVE

Looking to the future, when do you think the emergency will end?



Base: establishments that are open, about to reopen or have not closed for good

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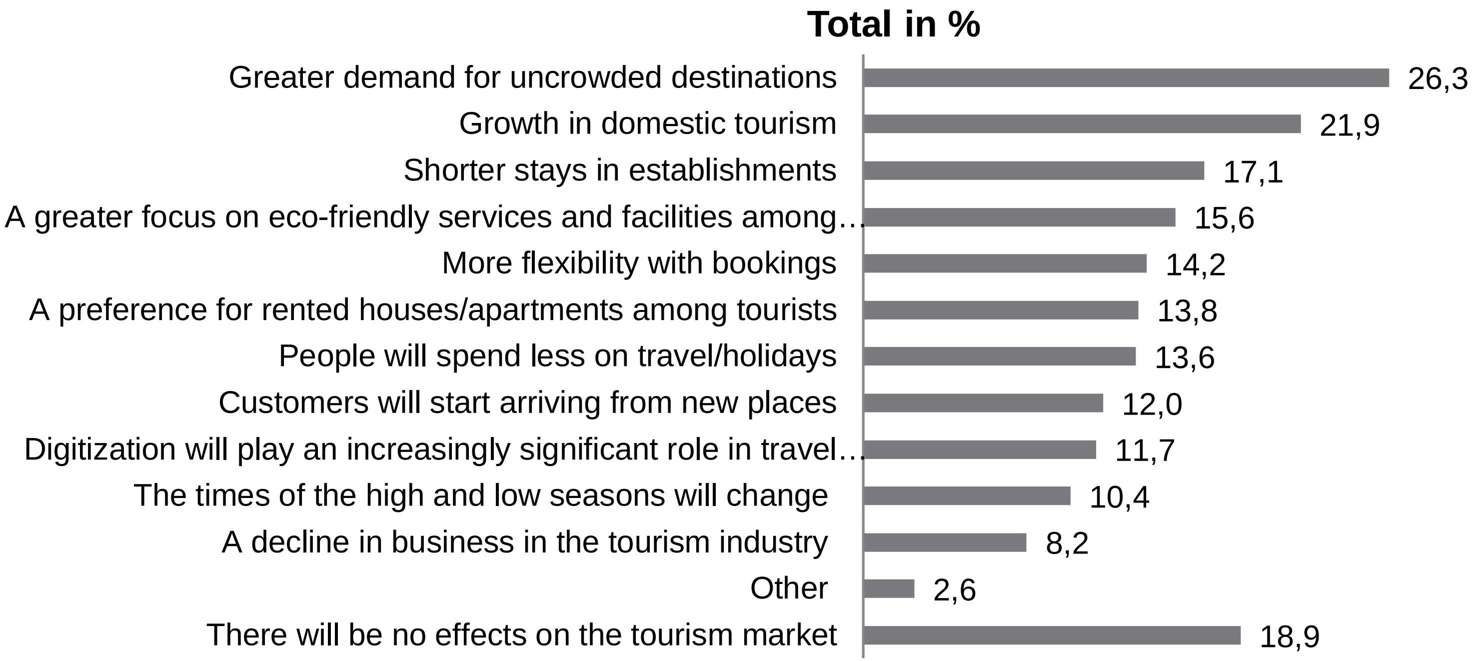
The future of tourism after the pandemic

FOURTH WAVE

After the pandemic, what do you think its long-term effects will be?



Base: establishments that are open, about to reopen or have not closed for good
Multiple-choice question

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Final thoughts and ideas for the future

- **Although the vast majority of those interviewed do not expect the emergency to end in the near future (those who think it will last until the end of 2022 are the largest group and another 20% think it will last even longer), there are some signs of optimism among the members of the tourism industry. The percentage of people saying that they are confident about the recovery of the industry has gradually increased. It now tops 80% in almost all cases, whether the results are classified by type of business (hotels/non-hotel establishments) or location.**

- **Looking to the future, only 18% of those interviewed do not expect the pandemic to have any long-term effects on the industry. Approximately a quarter of the people interviewed expect to see greater demand for uncrowded destinations, while 21% are predicting growth in domestic tourism. Everything that has happened is bound to have an effect on the length of stays, so customers are expected to demand more flexibility with their bookings.**

- **Rather than being directly brought about by the pandemic, some of the predicted developments will be driven by the call for change in response to new social needs. For example, those interviewed think that there will be a greater focus among customers on eco-friendly services and facilities, while digital technology will play an increasingly prominent role not only when booking but also throughout travel experiences and stays.**

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