



SCOUTING FOR OPPORTUNITIES IN TOURISM

ENIT services for the business world

ELENA DI RACO – MARKET
RESEARCH AND STATISTICS
DEPARTMENT MANAGER

The needs of the tourist accommodation sector

- Due to COVID-19, approximately 50% of businesses in the tourism industry¹ had to suspend investments in boosting their environmental sustainability and digitization of their establishments. On average, this tended to be the case with hotel businesses more than non-hotel businesses.
- In May 2021, approximately 57.0% of Italian businesses applied for financial support. In March 2022, applications were made by 26.6% of businesses. However, 40.7% stated that they still had not found out enough about the new “Financial Support Decree” that came into force in January.
- In general, the most widespread verdict about the amount of financial support available was that it was “paltry”. This was the view of 42% of the companies interviewed, compared to 65% in 2021. However, it should be noted that in March the number of those saying that they “don’t know” topped 40%.

¹ The survey involved interviews with 6118 managers of hotel and non-hotel establishments for tourists, all over Italy

The needs of the tourist accommodation sector

- 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.
- The businesses in the field voiced the need for “public” action. Approximately one third of those interviewed wanted to see improvements to infrastructure, while a significant percentage also demanded support for their local areas in the shape of communication and promotion initiatives by institutions.

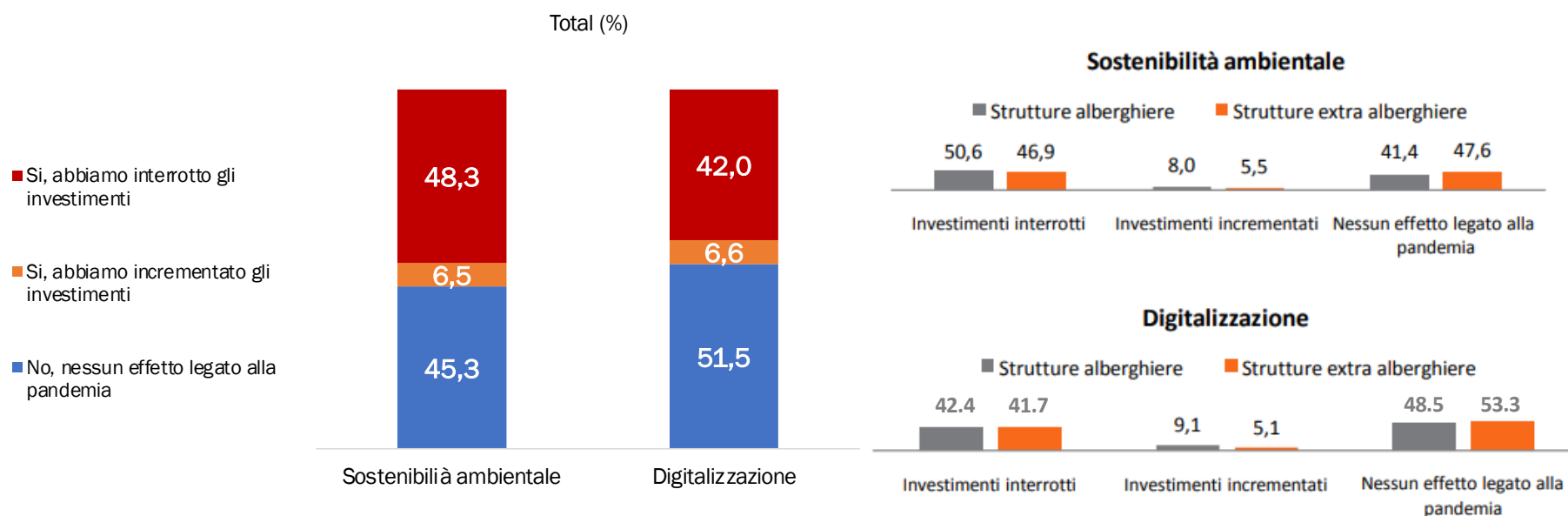


Source: ENIT Research Department – Survey into tourist accommodation trends (6th Wave), March 2022 – ENIT/NOTO SONDAGGI

The needs of the tourist accommodation sector

COVID-19's impact on investments in sustainability and digitization in tourism businesses

Did the COVID-19 public health emergency have an impact on the investments that your establishment made in the following areas?



Source: ENIT Research Department – Survey into tourist accommodation trends (6th Wave), March 2022 – ENIT/NOTO SONDAGGI

The needs of the tourist accommodation sector

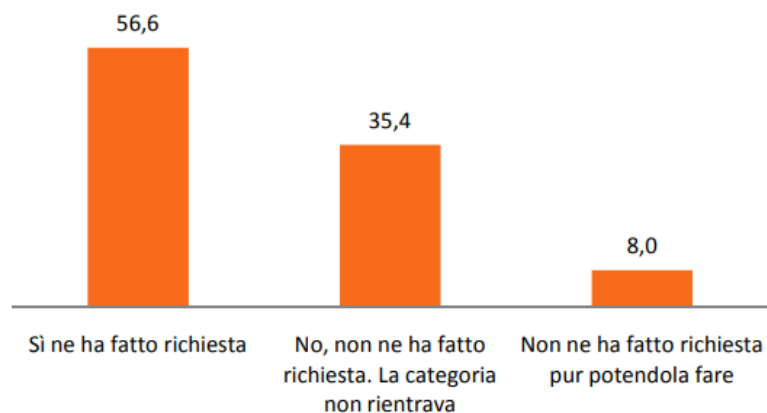
COVID-19's impact on investments in sustainability and digitization in tourism businesses

Requests for financial support

***Nell'ultimo anno il Governo ha previsto dei ristori.
La sua struttura ne ha fatto richiesta?***

Maggio 2021

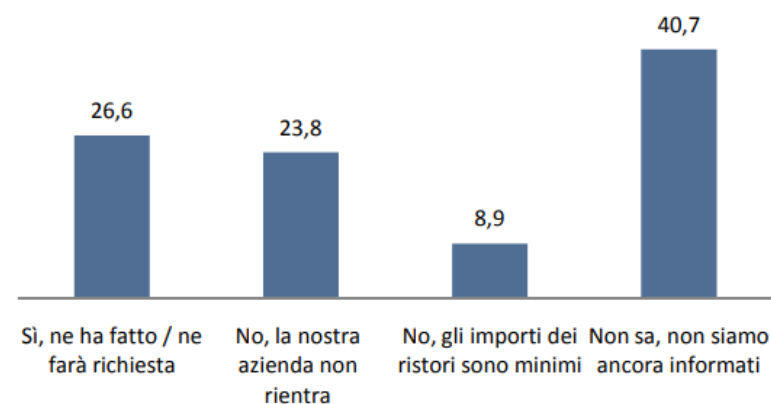
■ Totale in %



***Il 27 gennaio è entrato in vigore il nuovo
"Decreto Ristori". La sua struttura...***

Marzo 2022

■ Totale in %



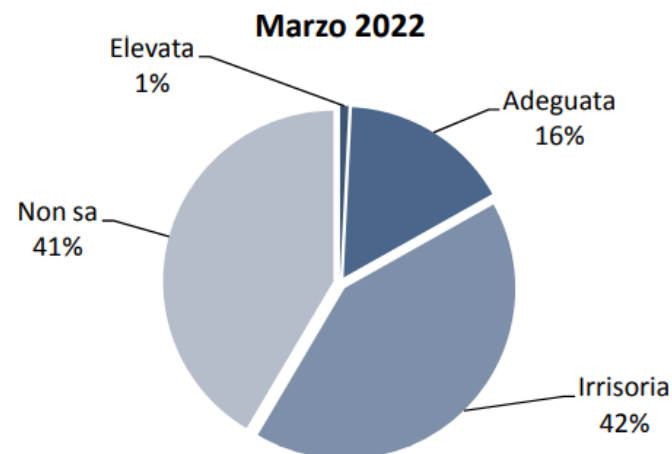
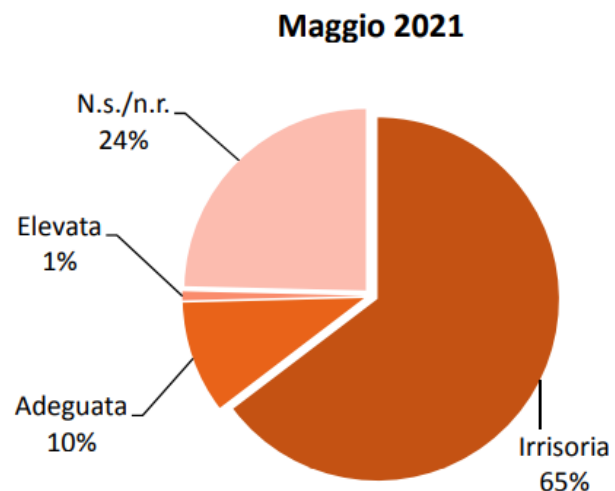
Source: ENIT Research Department – Survey into tourist accommodation trends (6th Wave), March 2022 – ENIT/NOTO SONDAGGI

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Rating the amount of financial support

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



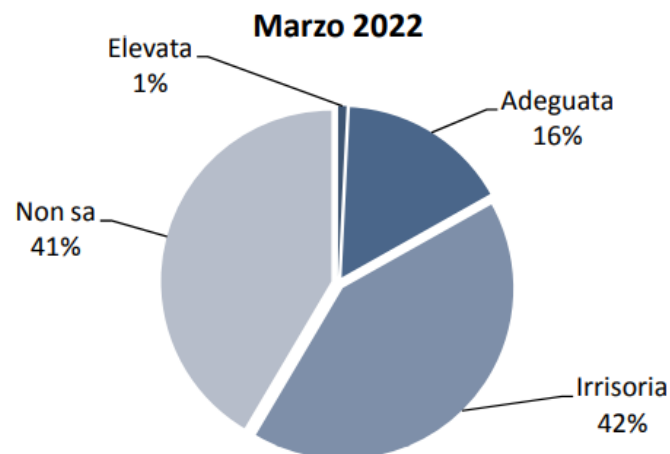
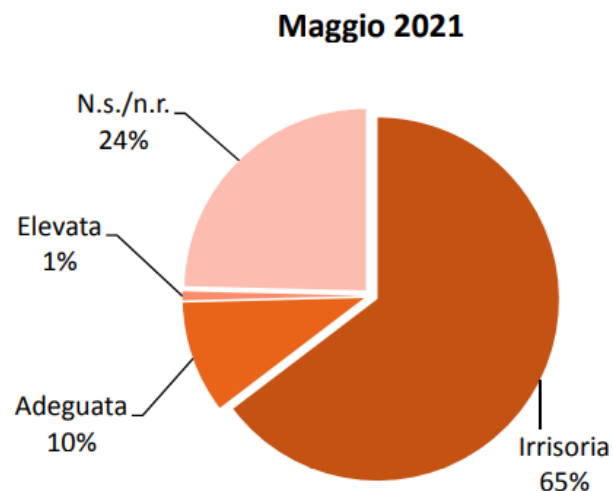
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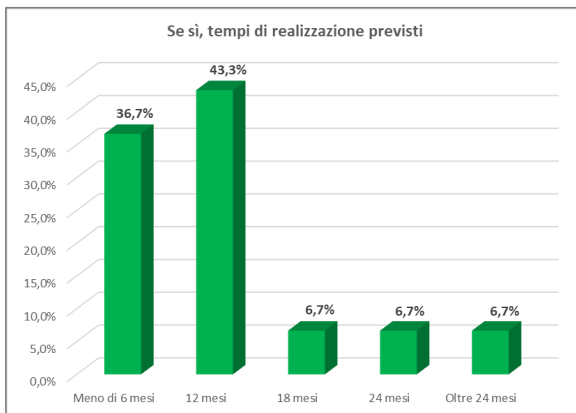
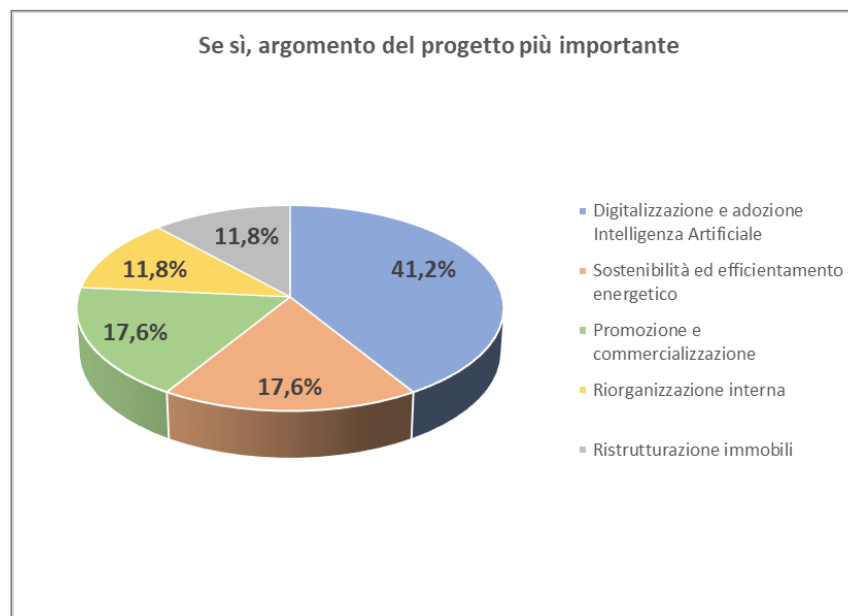
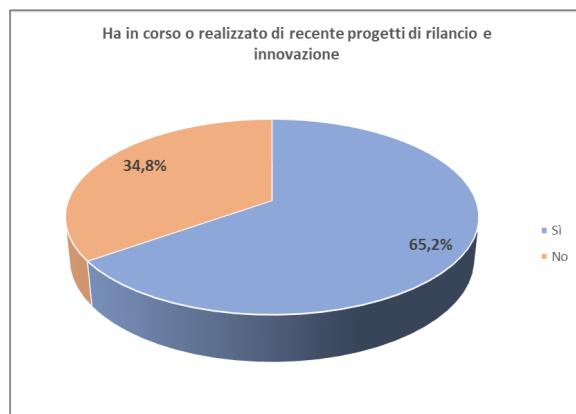
How to help members of the industry by promoting the recovery

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



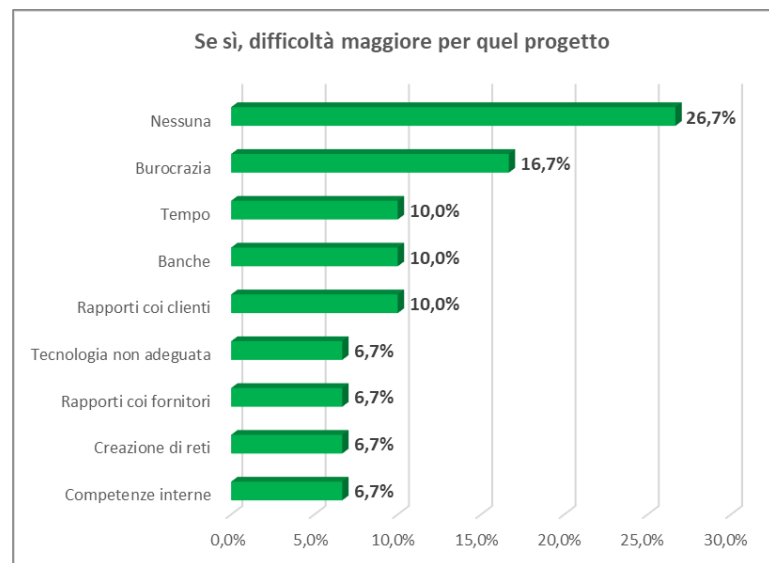
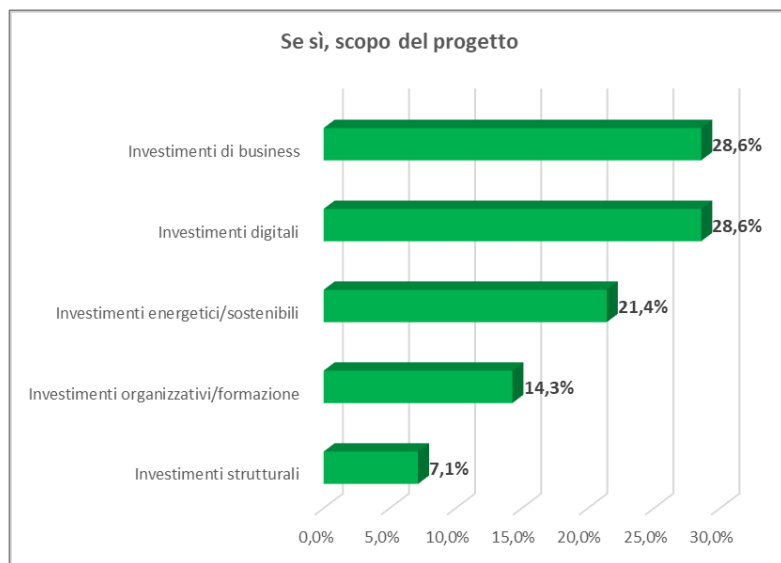
Source: ENIT Research Department – Survey into tourist accommodation trends (6th Wave), March 2022 – ENIT/NOTO SONDAGGI

Analysing the answers: experiences using incentives and other measures



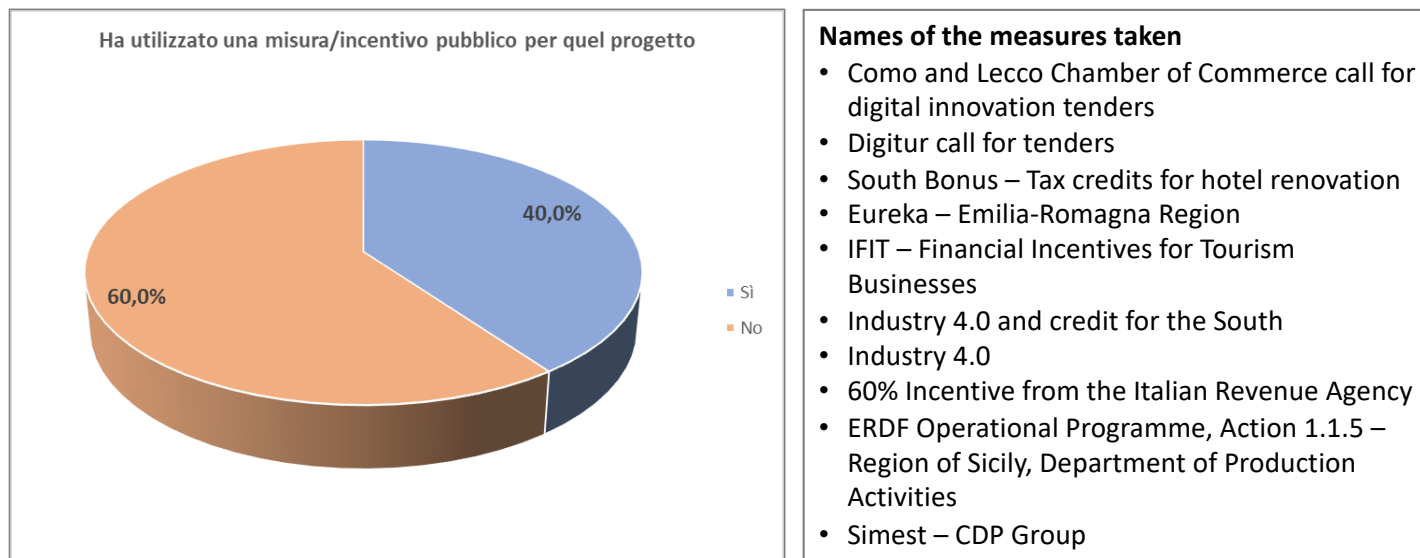
Source: Studio Giaccardi & Associati - NATIONAL SURVEY OF ACCOMMODATION PROVIDERS AND SERVICES

Analysing the answers: experiences using incentives and other measures



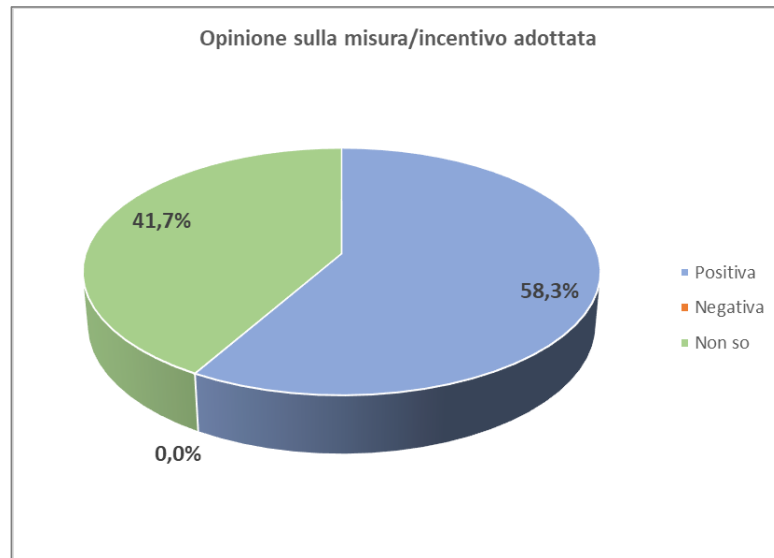
Source: Studio Giaccardi & Associati

Analysing the answers: experiences using incentives and other measures



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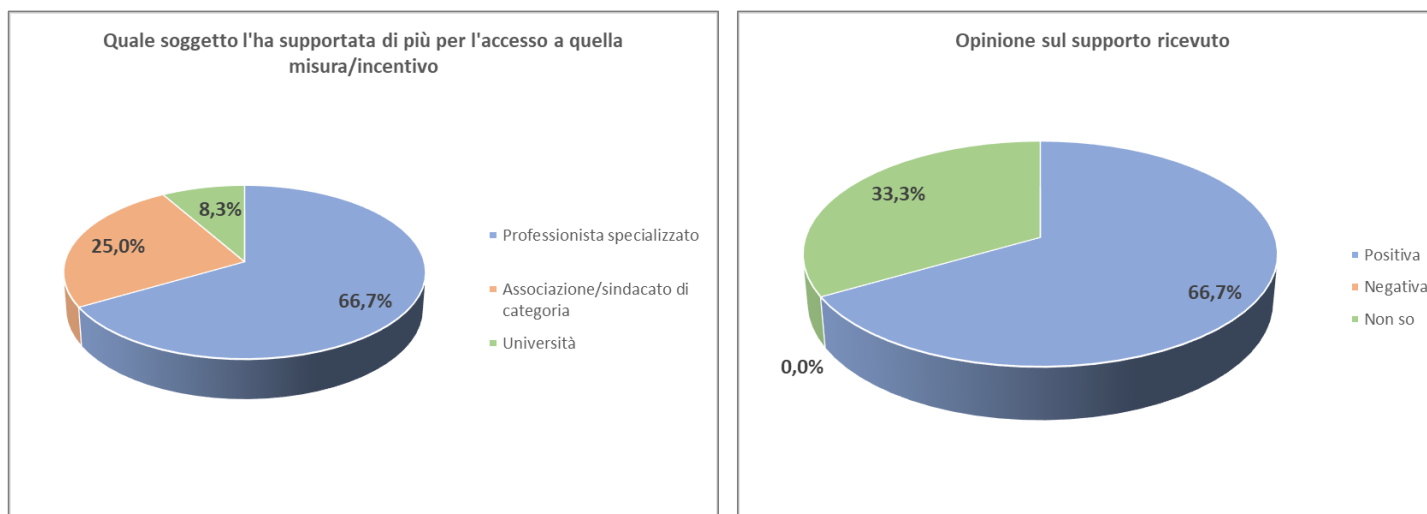


POSITIVE FEEDBACK

- It is an automatic incentive
- Digital and digital promotion investments are increasingly significant and I appreciate the support in this respect because it benefits not only my business but also the destination
- It provided significant financial support
- We think we will get the contribution and it will help
- Support for technological innovation by the business
- Direct support for business owners

58.3% of those with projects that are currently under way have a positive opinion about the incentive/measure taken

Analysing the answers: experiences using incentives and other measures



The 12 people who have used/are using measures/incentives for their projects, received support from

- **Professional specialists 66.7%**
- **Trade unions/associations 25.0%**
- **Universities 8.3%**

66.7% had a positive opinion about the support received.