

OPEN-AIR TOURISM OBSERVATORY

Italian market tracking



First wave - June 2021

Study no. 052-2021



Introduction

Human Company and Enit commissioned a tracking study from the Piepoli Institute aimed at measuring the attraction of open-air holidays for Italians during 2021.

This document illustrates the result of the first survey, carried out from 7 to 12 June 2021, using CATI/CAMI/CAWI methods, on a sample of 1015 individuals, representative of the Italian adult population.

The survey considered:

- Open-air holidays in the last year
- Changes to holidays caused by the pandemic
- Forecasts for open-air holidays for summer 2021
- Italy's image as a holiday destination
- Influence of the vaccination campaign on summer holidays.



Sample

GENDER



men
48%

women
52%

AGE



15-34
years
24%



35-54
years
35%



55 years and
over
41%

GEOGRAPHICAL AREA



North
45%



Centre
19%



South and
Islands
36%

SIZE OF TOWN/CITY



Up to 10,000
inhabitants
33%



10 - 100,000
inhabitants
44%



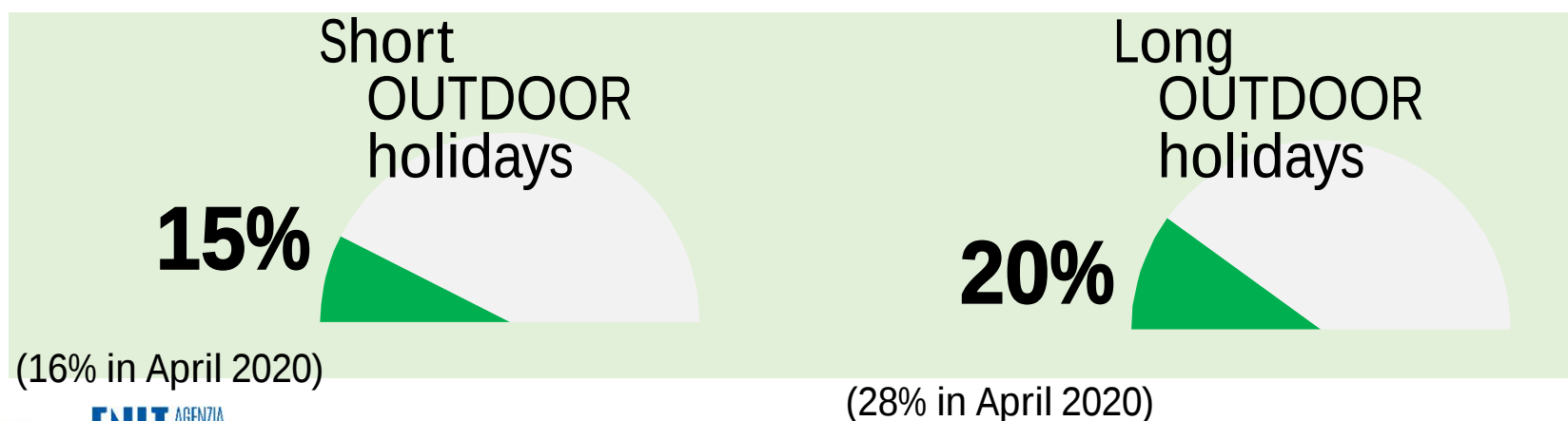
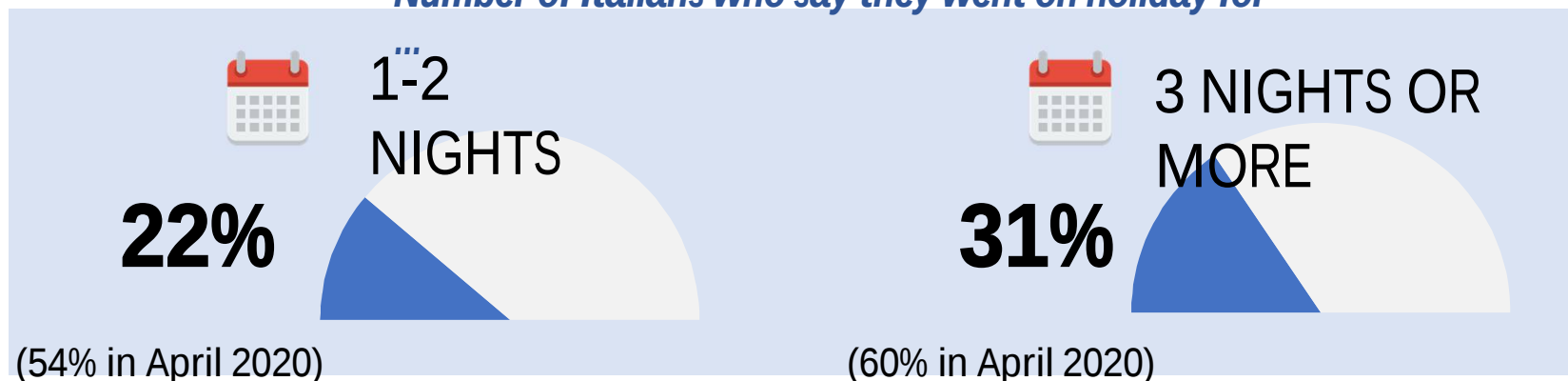
Over 100,000
inhabitants
23%



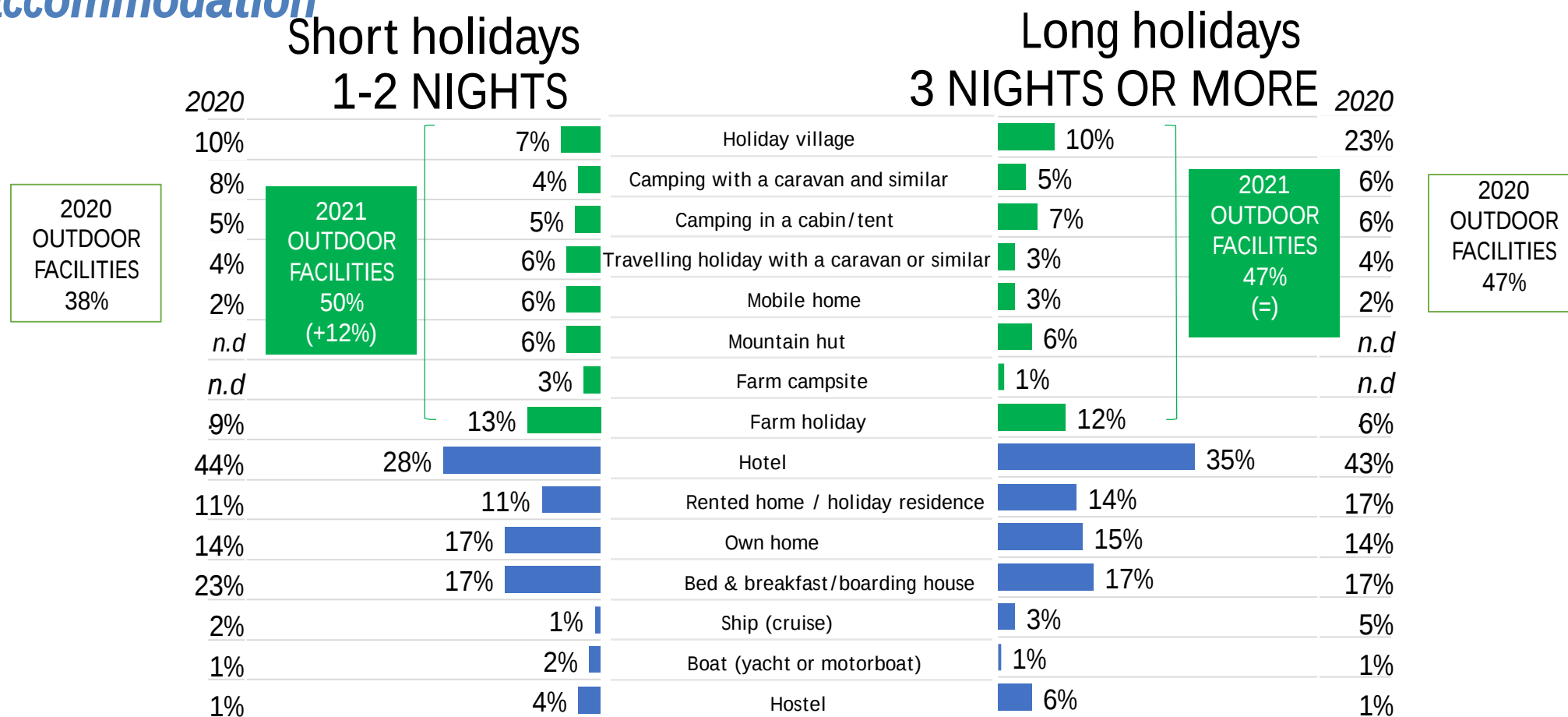
Results

Holidays in the last year: half the holidays taken, with a smaller drop in long outdoor holidays

Number of Italians who say they went on holiday for



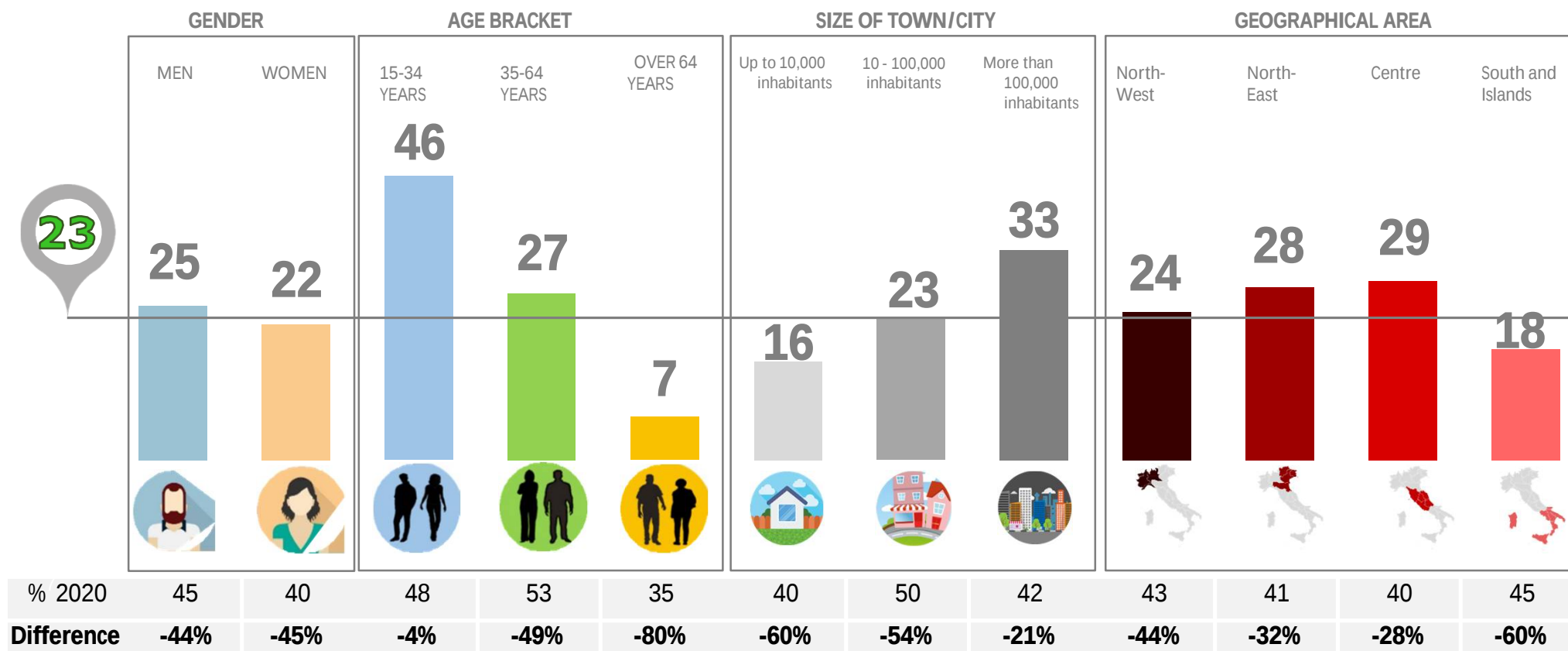
Accommodation during last holiday: for short holidays, a rise in outdoor accommodation, fewer holiday villages and more farm holiday accommodation



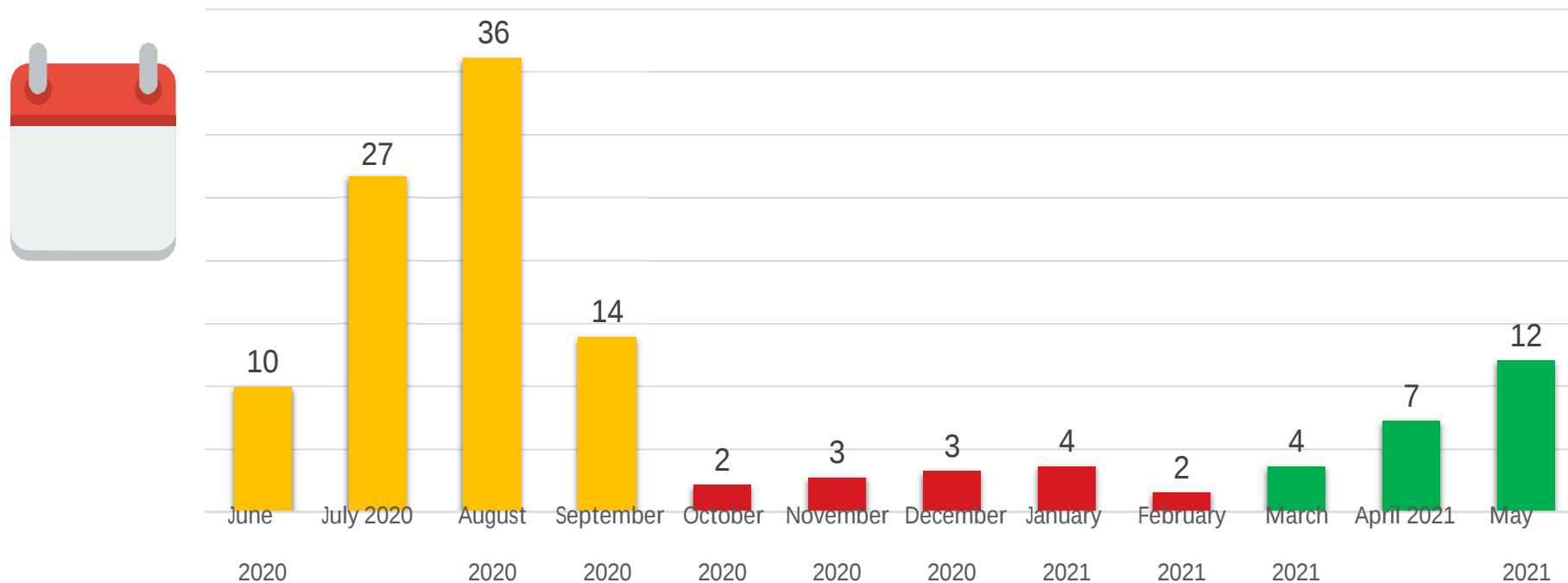
Diapositiva 6

a1 immagino non rilevato/rilevabile, not detected/detectable, ma verificherei
ann-e; 17/01/2023

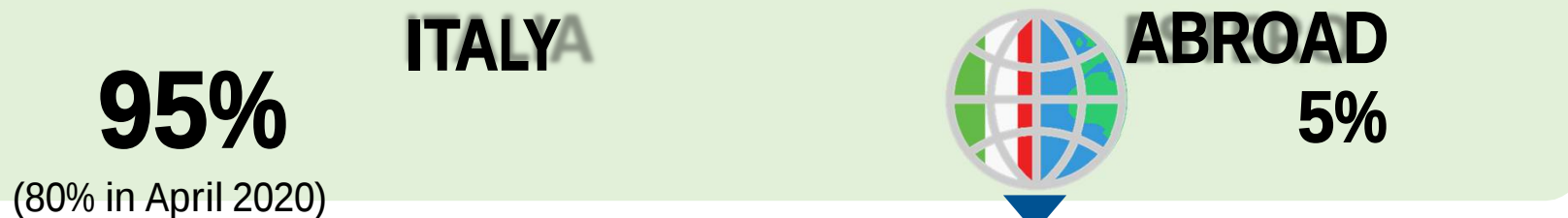
Profile of the outdoor tourist in the last year: very large share of young people, stable compared to 2020, greater reduction among seniors



Period of the year for outdoor holidays: high concentration in the summer months



Location of longer outdoor holidays: outdoor holidays almost exclusively in Italy. Trentino and Tuscany the top destinations

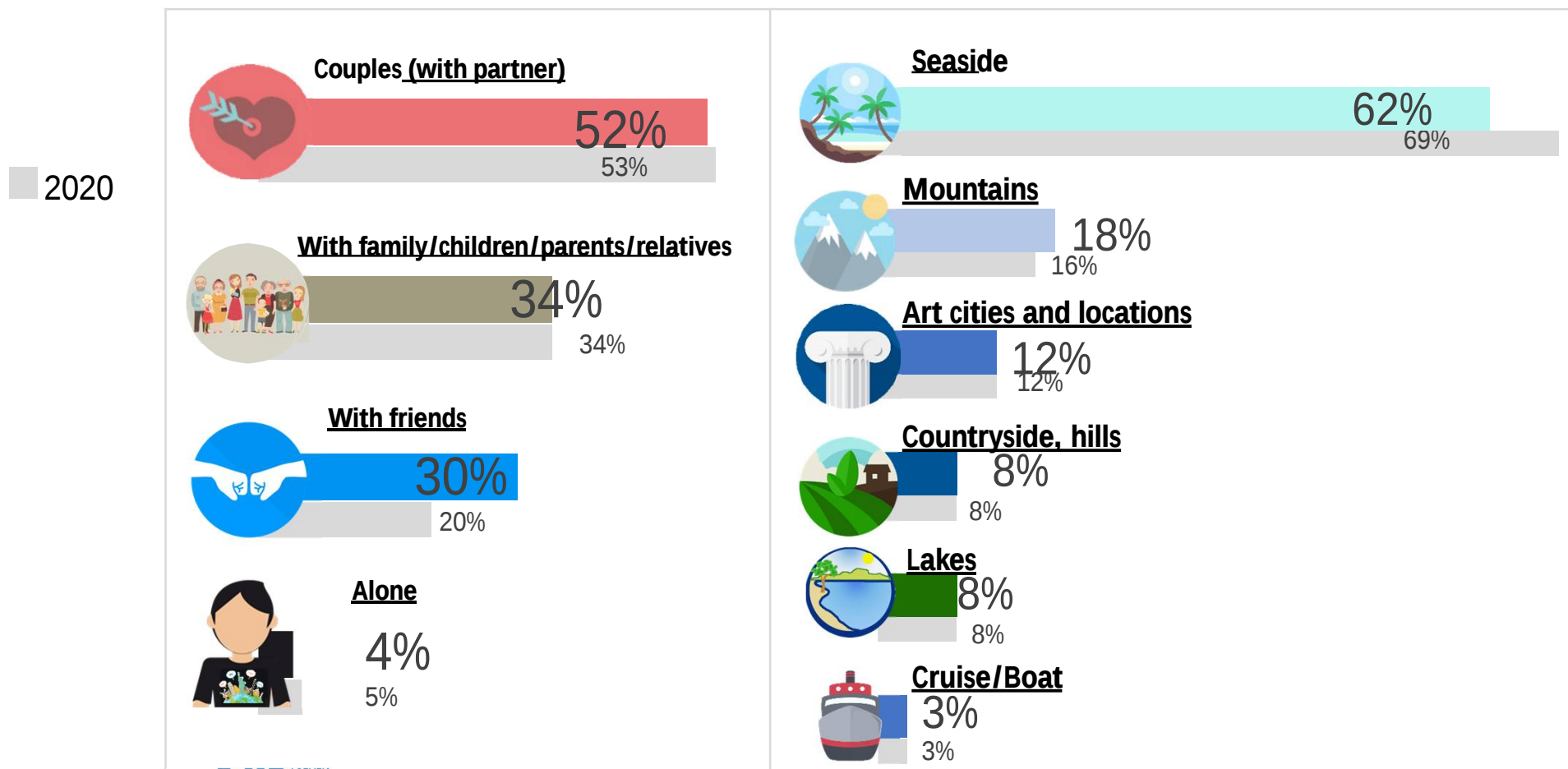


TOP DESTINATIONS ITALY (95%)	
TRENTINO ALTO ADIGE	14%
TUSCANY	12%
PUGLIA, SICILY	11%
VENETO	10%
EMILIA ROMAGNA, LOMBARDY, LAZIO, PIEDMONT	8%
CALABRIA	7%
SARDINIA, MARCHE, CAMPANIA	5%

TOP DESTINATIONS ABROAD (5%)	
1	Spain
2	Portugal
3	Greece
4	France
5	Netherlands

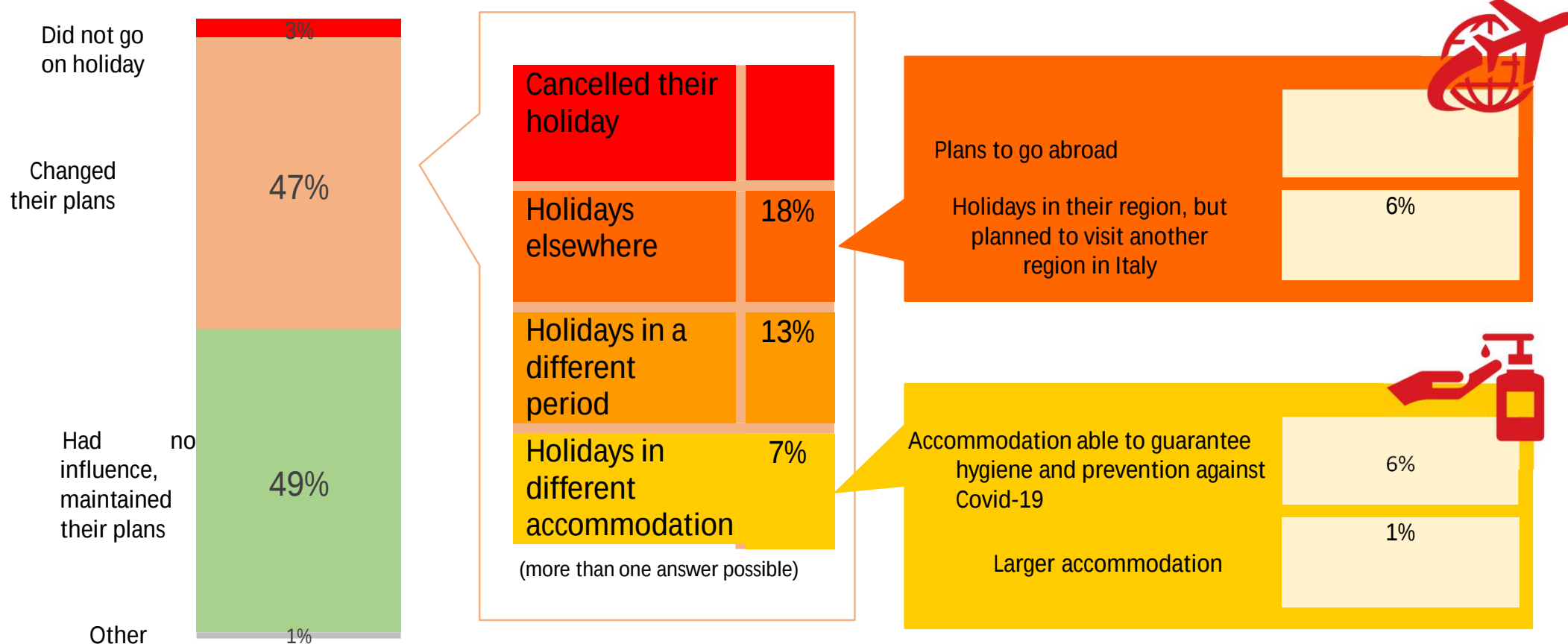
Longest outdoor holiday in the last year

Who with and in what type of location? Rise in couple holidays



***Changes as a
result of the
pandemic***

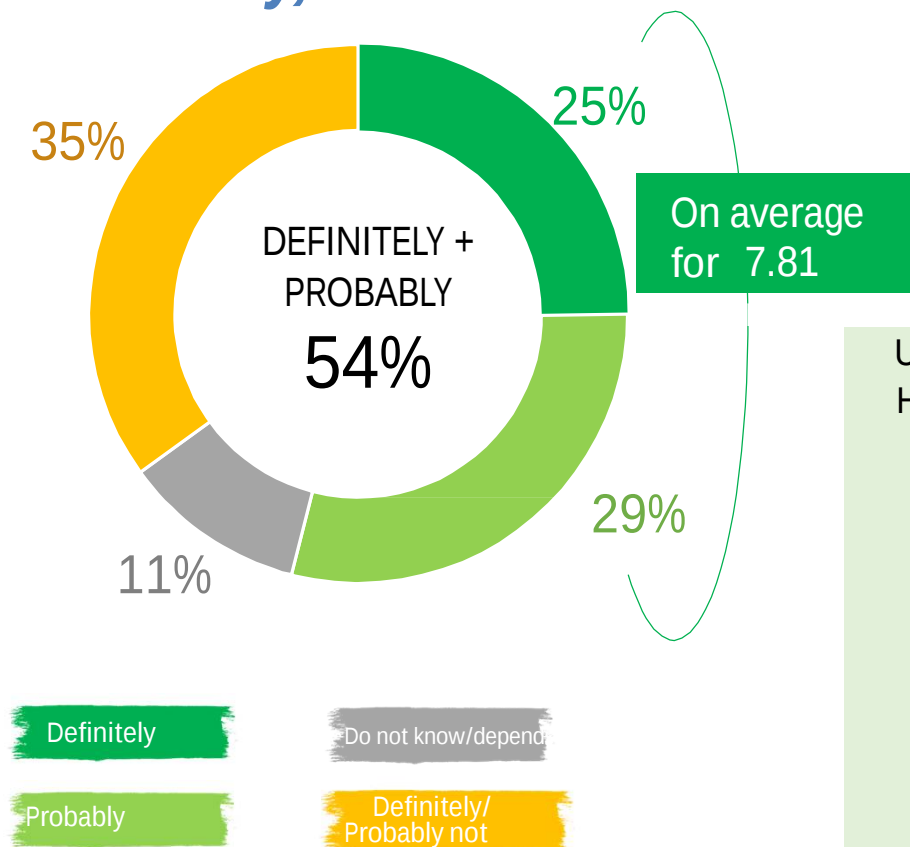
Changes to holidays due to the pandemic: half of Italians changed their holiday plans, less than a fifth cancelled them





Forecasts for summer 2021

Holiday intentions for this summer: one in two Italians intends to go on holiday, for more than a week on average

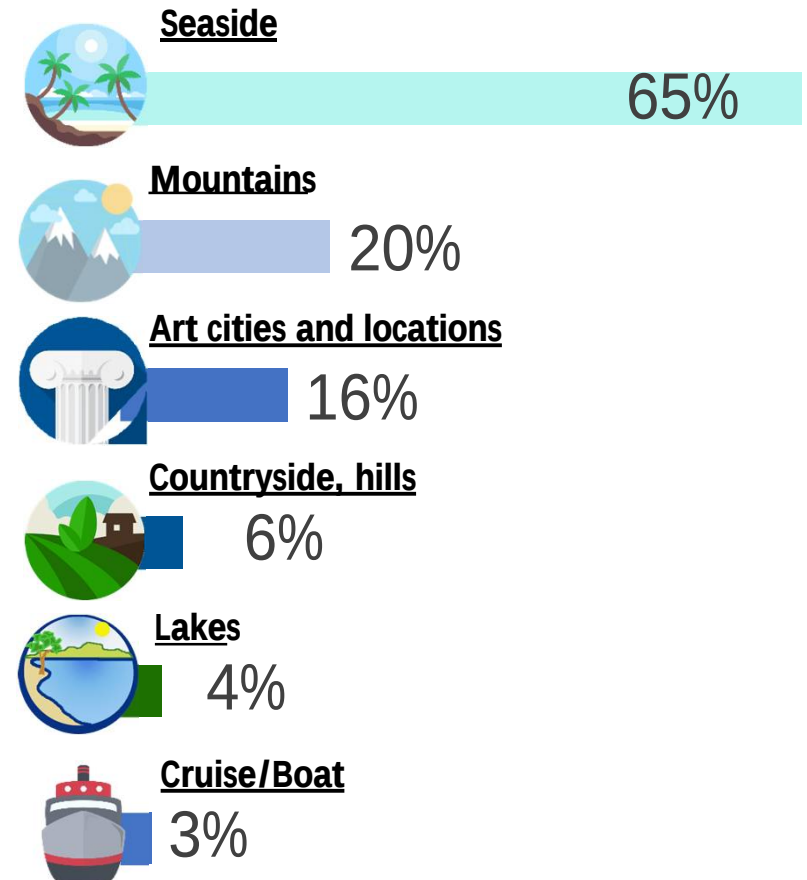
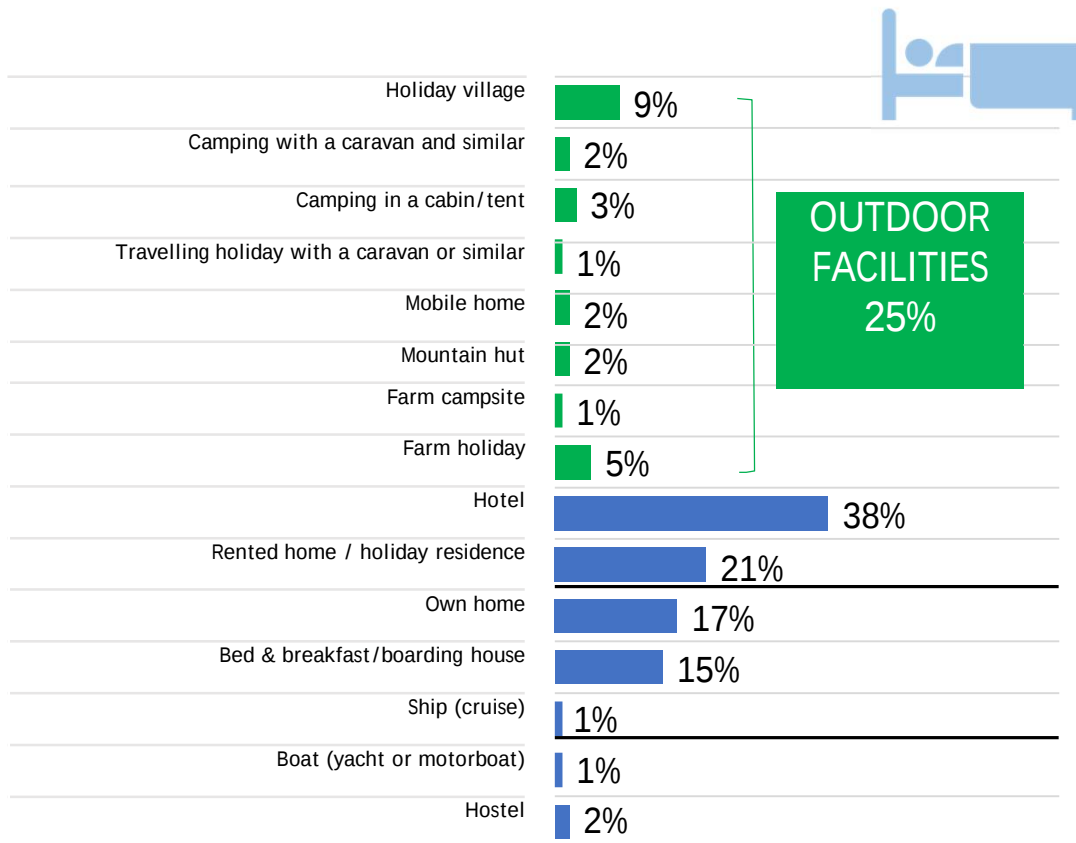


TOTAL	29%	25%	54%
HOLIDAYS IN THE LAST YEAR	37%	48%	85%
OUTDOOR HOLIDAYS IN THE LAST YEAR	42%	43%	85%

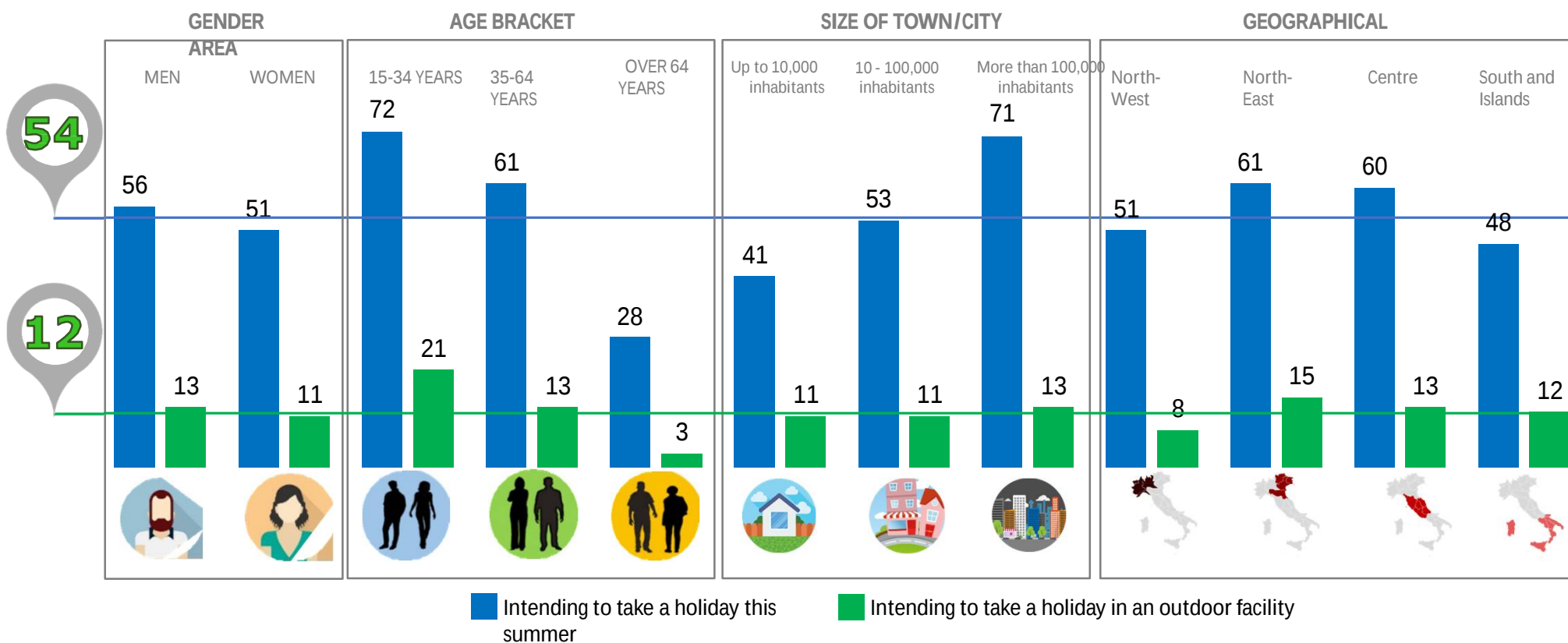
USUAL HOLIDAYS

at the seaside	27%	34%	61%
in the mountains	35%	22%	57%
cultural	30%	34%	64%
in a holiday village	34%	44%	78%
camping, in a cabin or caravan	23%	48%	71%
in farm holiday accommodation	35%	38%	73%
in a hotel	30%	37%	67%
rented home/holiday residence	34%	41%	75%
own home	27%	38%	65%
bed & breakfast / boarding house	33%	36%	69%

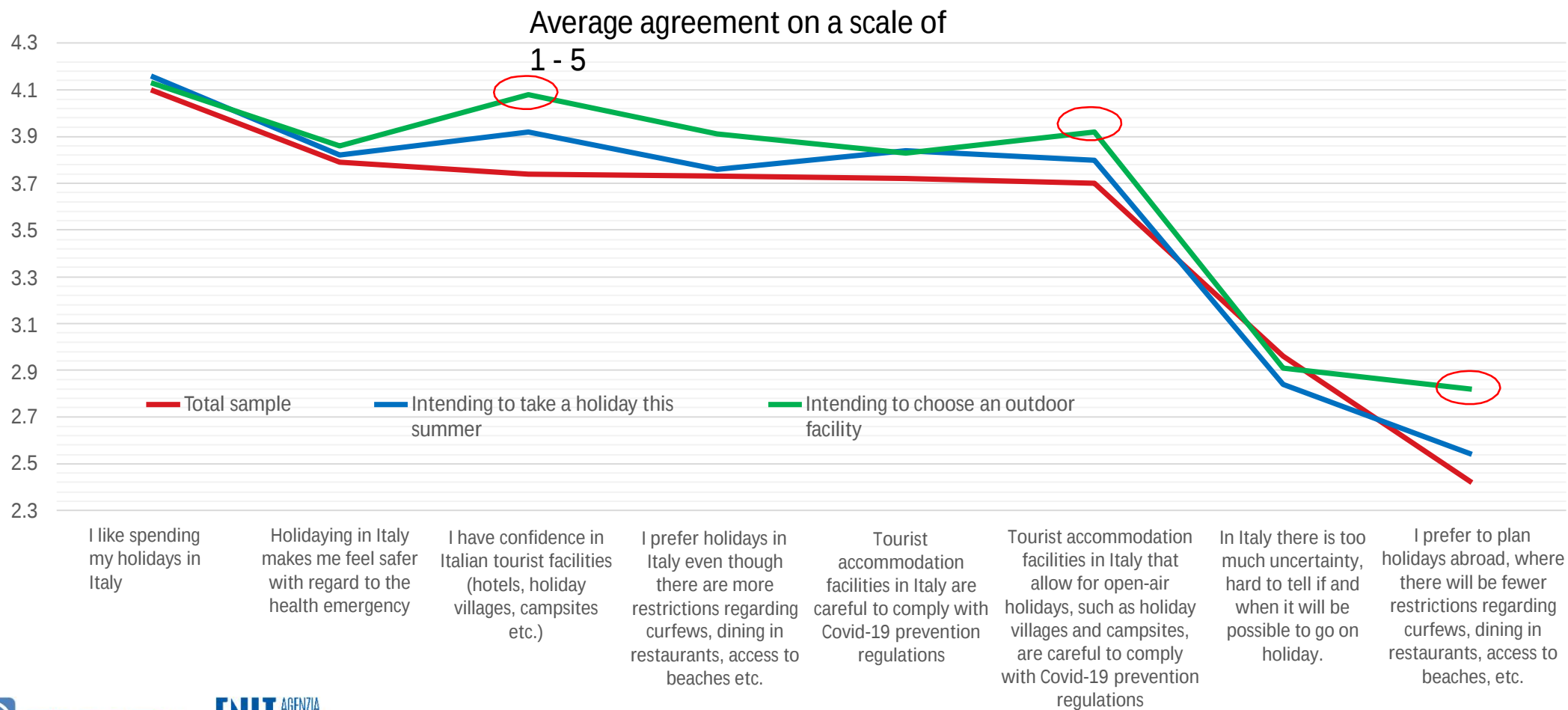
Where this summer: a quarter of holidaymakers intend to choose outdoor facilities



Profile of tourists this summer: seniors still not very inclined towards holidays



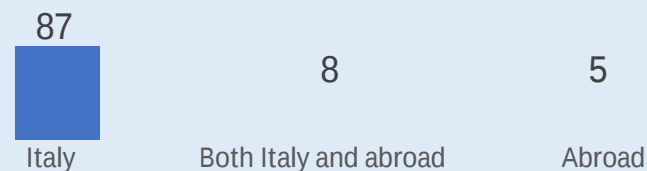
Italy's image as a tourist destination: outdoor holidaymakers have confidence in Italian facilities, but are more likely to consider those abroad, where there are fewer restrictions



Database: total sample (n=1,015); respondents intending to take a holiday (n=543); respondents intending to take a holiday in an outdoor facility, excluding on a boat (n=118)

Location of holiday this summer: Sicily is the top destination

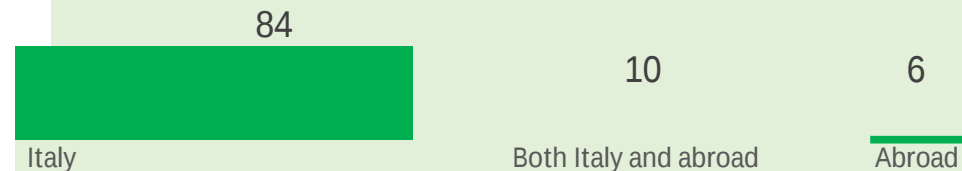
Total intending to take a holiday



SICILY	14%
PUGLIA	11%
TUSCANY	10%
TRENTINO ALTO ADIGE, LIGURIA, CALABRIA, SARDINIA	9%
VENETO, EMILIA-ROMAGNA	7%
CAMPANIA	6%
LAZIO, LOMBARDY	5%



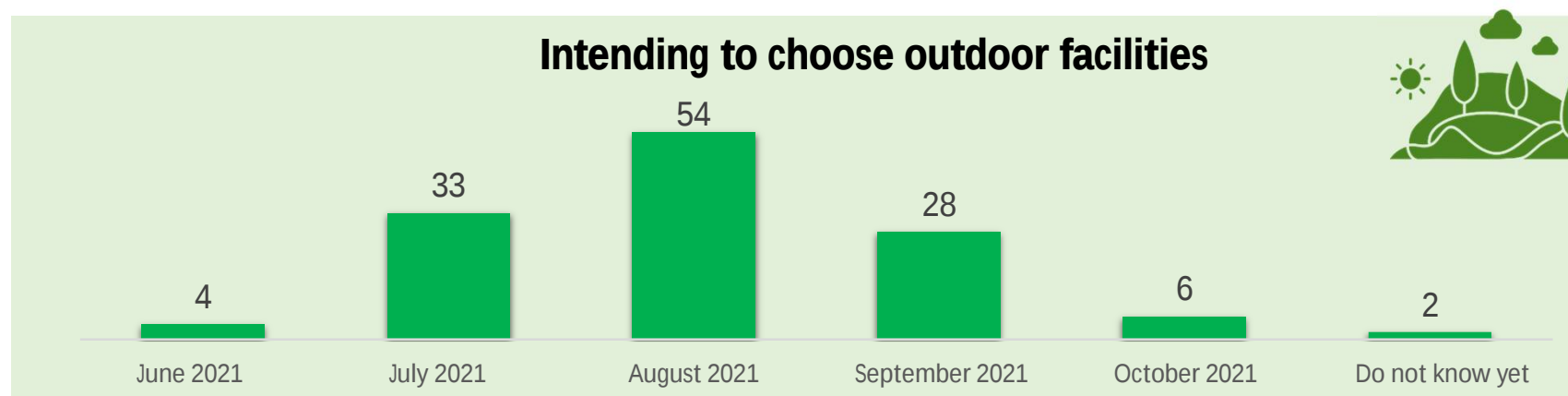
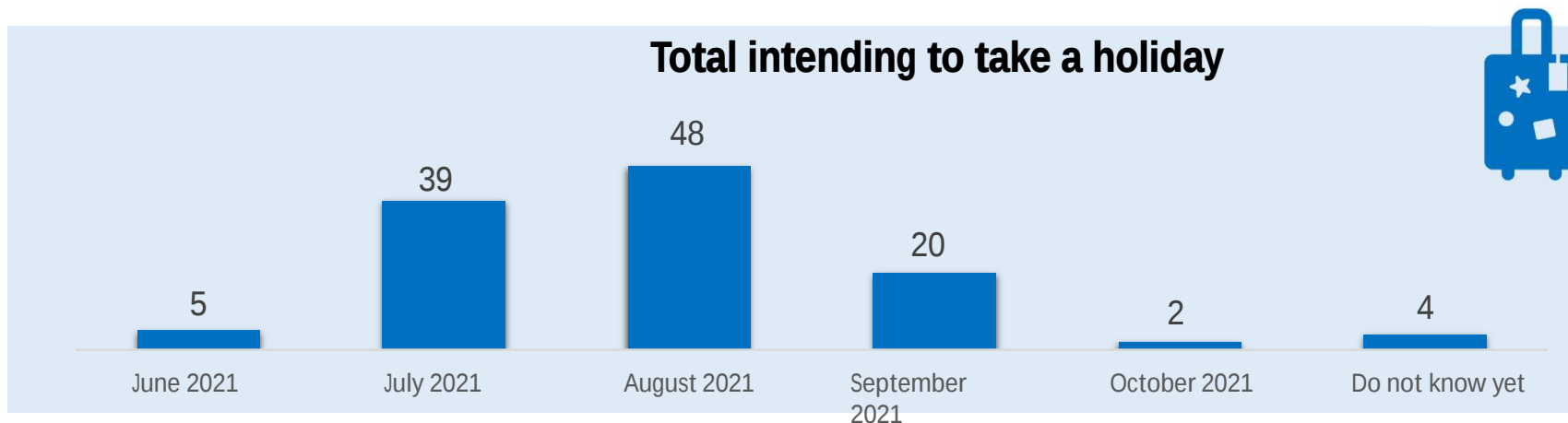
Intending to choose outdoor facilities



SICILY	16%
SARDINIA	14%
LIGURIA	12%
PUGLIA, TUSCANY	10%
LOMBARDY	9%
VENETO, LAZIO, TRENTINO ALTO ADIGE	8%
VALLE D'AOSTA, MARCHE	7%



Holiday period this summer: August above all, significant numbers of September tourists in outdoor facilities

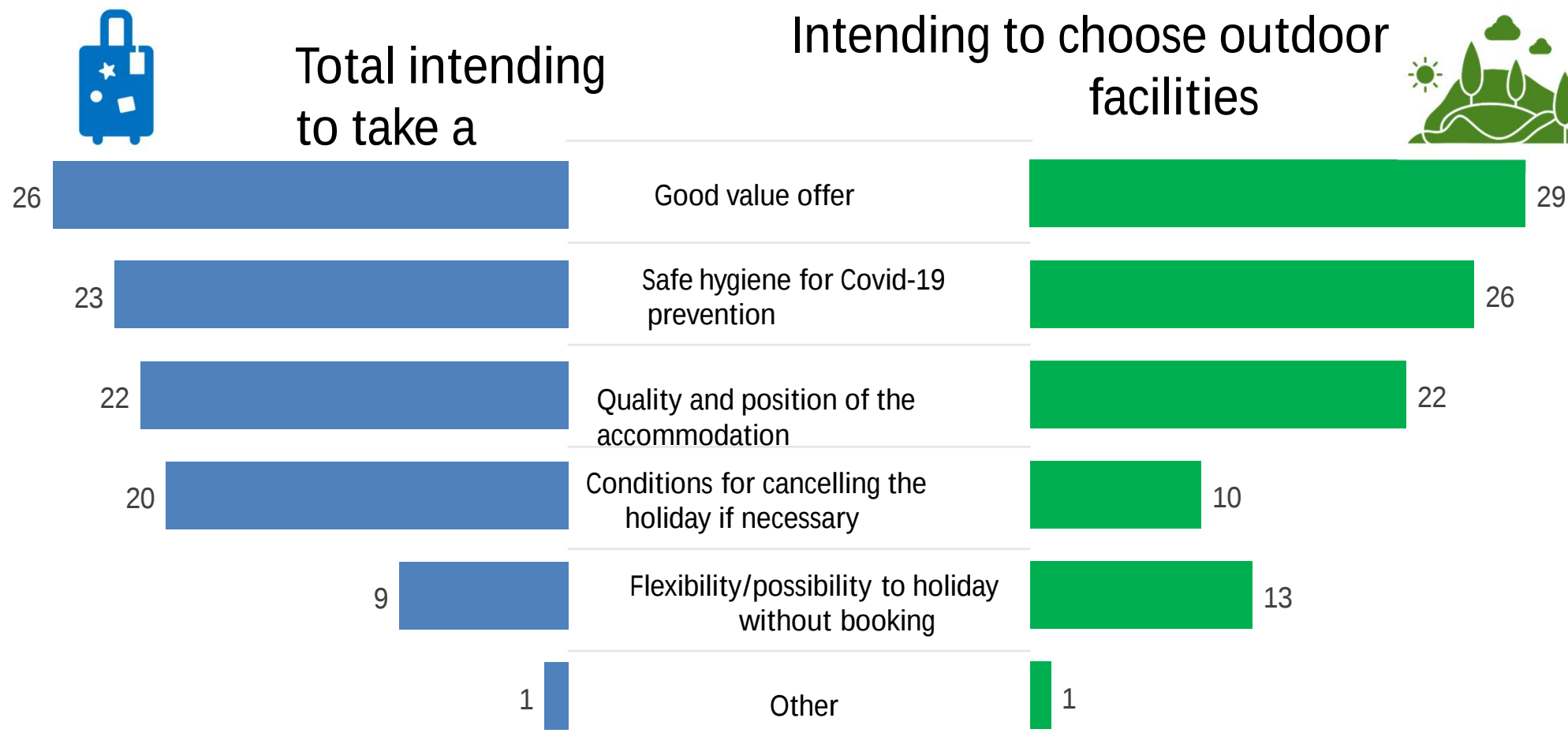


Holiday bookings for this summer: a third have already booked, a quarter of those intending to holiday in outdoor facilities



Database: respondents intending to take a holiday (n=543); respondents intending to take a holiday in an outdoor facility, excluding on a boat (n=118)

Main criteria for choosing holiday accommodation: value for money and hygiene the main drivers indicated



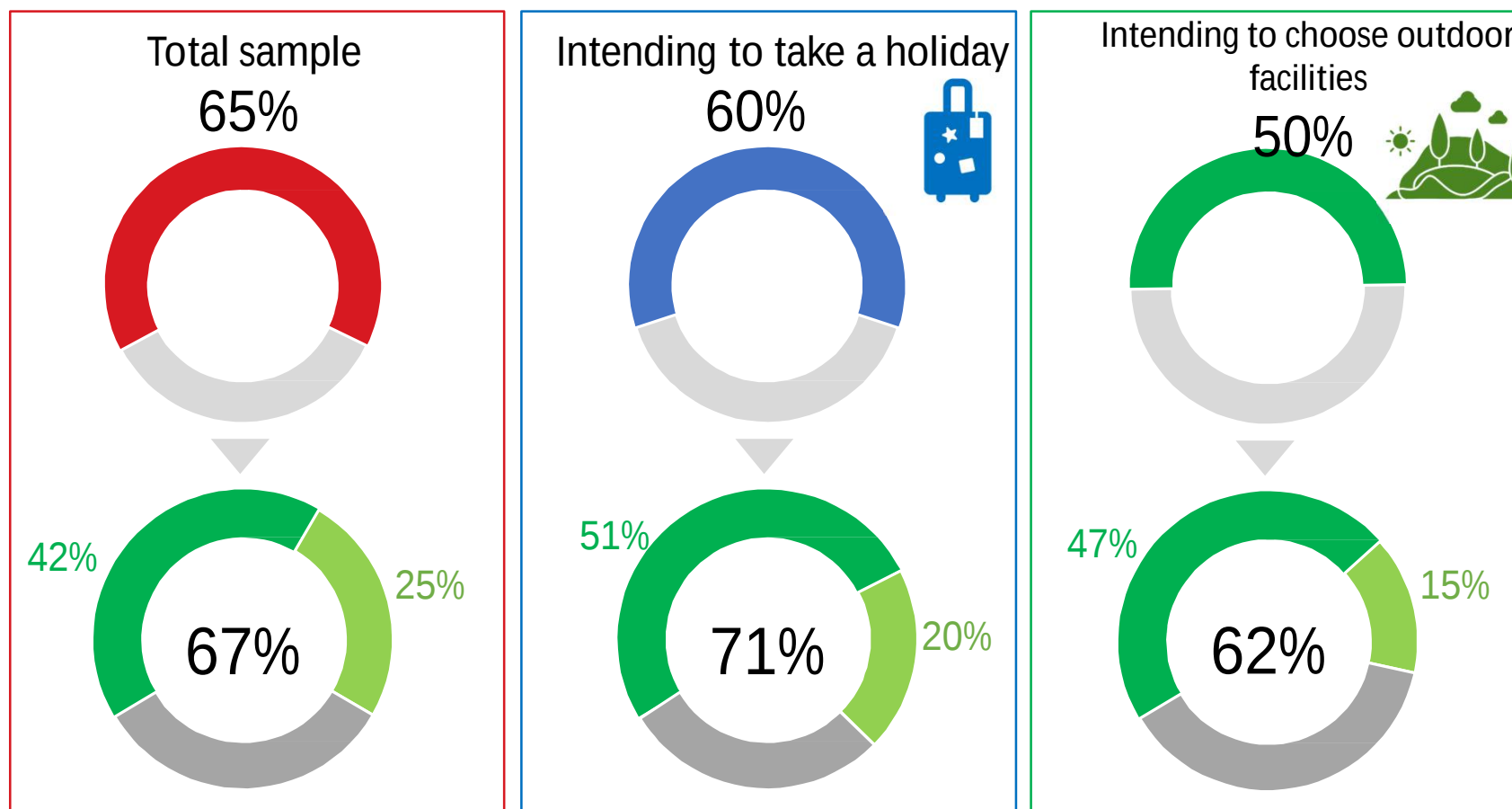


Impact of the vaccination campaign

The vaccination campaign: fewer vaccinated holidaymakers in outdoor facilities

Say they
have been
vaccinated

Vaccination
intention
among the
unvaccinated



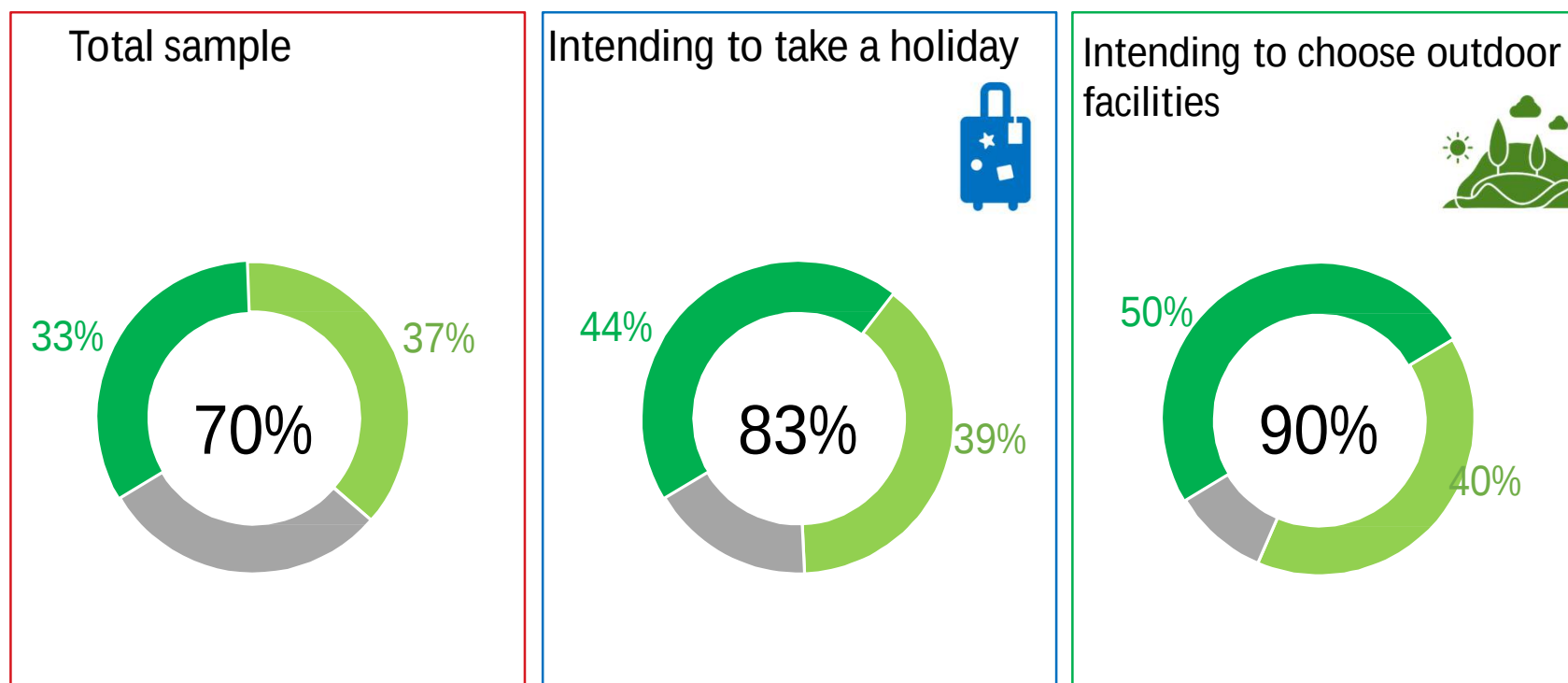
Definitely

Probably

Do not know/Definitely/Probably

Influence of the vaccination campaign on booking intention (whether the vaccination campaign prompts bookings)

Does the vaccination campaign, and the rise in vaccination numbers in Italy, make you more inclined to book a holiday?



Definitely

Probably

Do not know/Definitely/Probably not

Summary conclusion

The last year has witnessed a drastic reduction in holidays on the part of Italians, with numbers of both long and short holidays falling by half; there has also been a significant drop in the number of Italians spending holidays in outdoor facilities.

In the last year, 23% of Italians took at least one outdoor holiday; the largest drop regards

seniors, with just 7% of the over 64 age bracket going on holiday, a reduction of 80% compared to the previous year.

The pandemic has resulted in changes to the holiday plans of one out of two Italians, and for 16% of respondents, it caused them to cancel a planned holiday. Others (18%) holidayed somewhere different from where they had planned; 6% changed their accommodation to ensure their choice was able to guarantee hygiene standards consistent with preventing contagion.

For summer 2021, more than five out of ten Italians have planned a holiday, with a quarter planning to choose an outdoor facility, in particular holiday villages and farm holiday accommodation. 12% of Italians are intending to choose an outdoor hospitality facility;

the profile identified in terms of age is similar to last year, with significant numbers of young people and small numbers of seniors.

Almost a quarter of holidaymakers have already booked, while almost half intend to book in June or July. A guarantee of compliance with hygiene regulations to prevent contagion is the second most important criterion of choice, after good value, demonstrating that there is still a great deal of importance given to the pandemic: the vaccination campaign

has a major impact on bookings, encouraging seven out of ten Italians to consider a holiday, rising to nine among those intending to take a holiday in an outdoor facility.



Via Benvenuto Cellini 2/A
20129 Milan
tel. +39 02 5412 3098



Via di Ripetta 39
00186 Rome
tel. +39 06 3211 0003



www.istitutopiepoli.it
istituto@istitutopiepoli.it
VAT no.: 03779980964



ISTITUTO PIEPOLI



Member of

***Thank you for your
attention***