

OPEN-AIR TOURISM OBSERVATORY

Italian market tracking



Second wave - November 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%



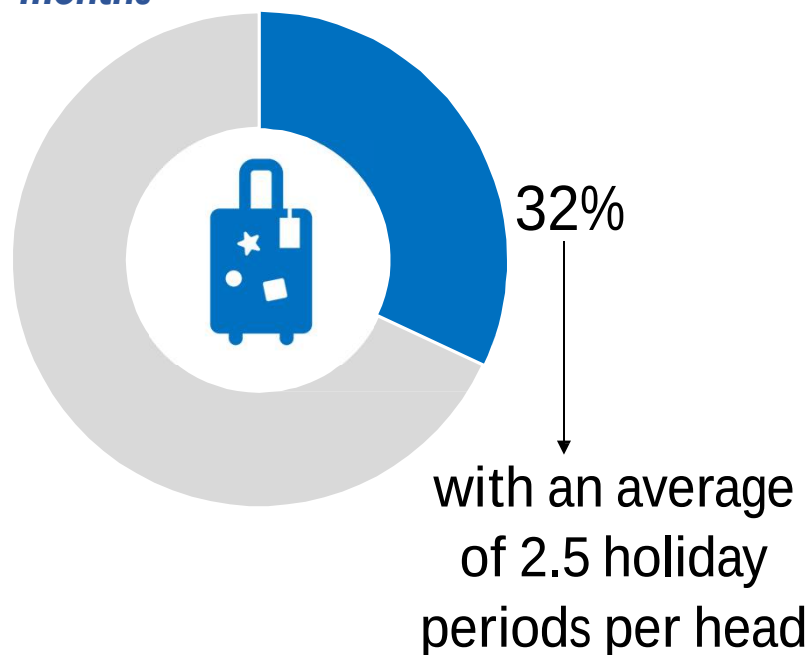
Over 100,000
inhabitants
23%



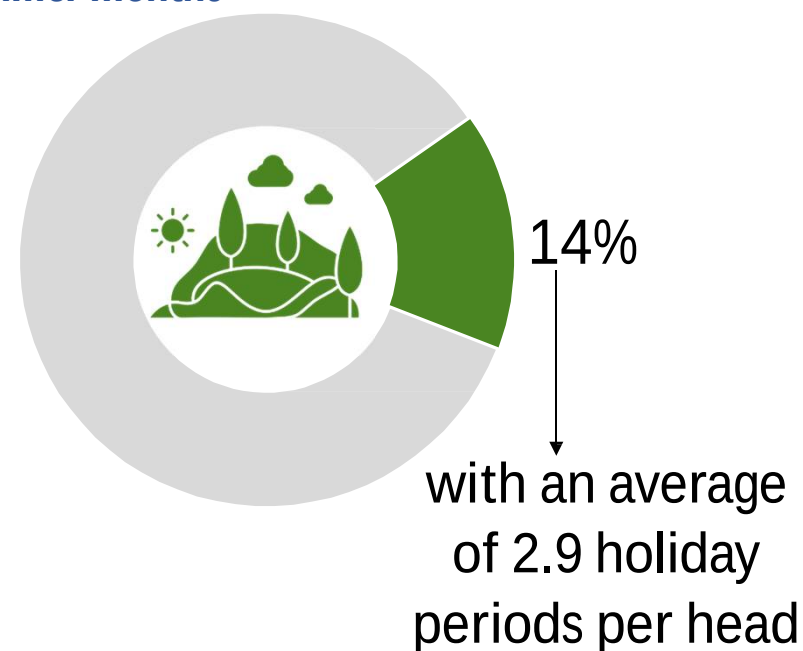
Results

Summer holidays: *a third of Italians took a holiday in the summer months; 14% say they took an outdoor holiday*

Number of Italians who say they took a holiday in the summer months

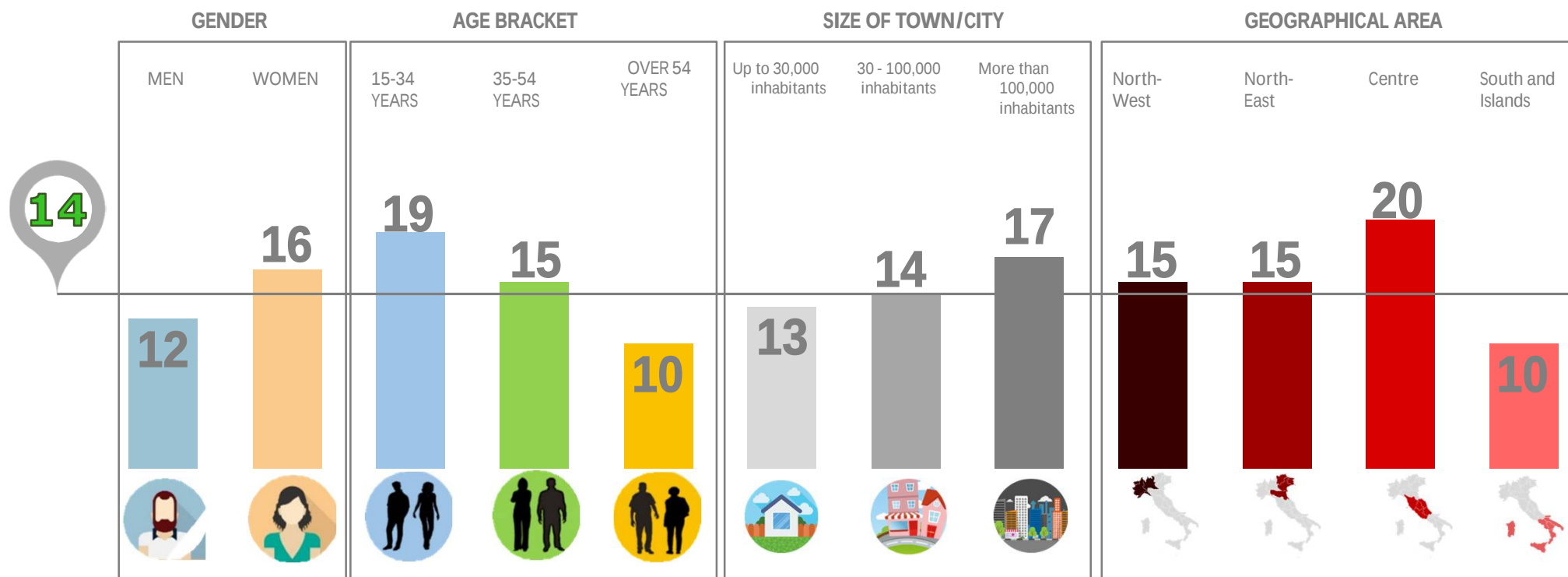


Number of Italians who say they went on an outdoor holiday in the summer months

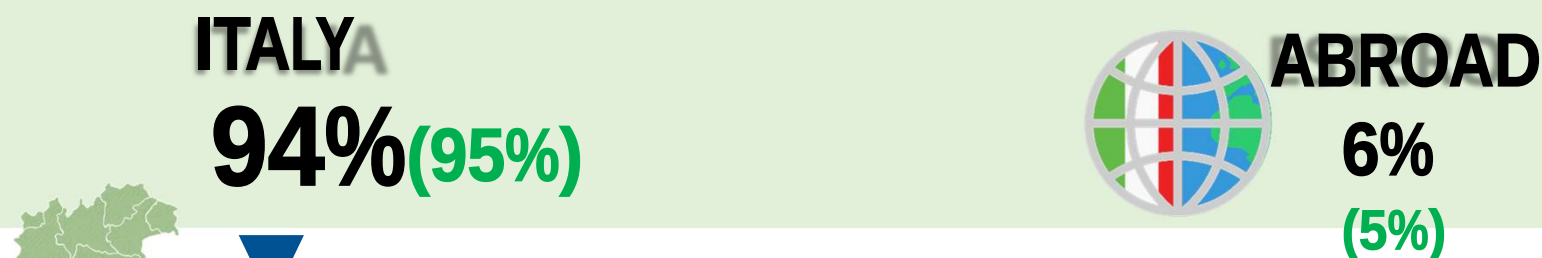


Database: total sample (n=1026)

Profile of the outdoor tourist last summer: *higher numbers of women and in Central Italy*



Location of summer outdoor holidays: *more than nine out of ten in Italy, but many would have gone abroad had it not been for the health restrictions*



Was your choice due to the travel difficulties caused by Covid-19?

No, I would have holidayed in Italy in any case

80 (85%)

Yes, I would have chosen to holiday abroad

20 (15%)

Database: respondents who took a holiday in the summer months (n=326);

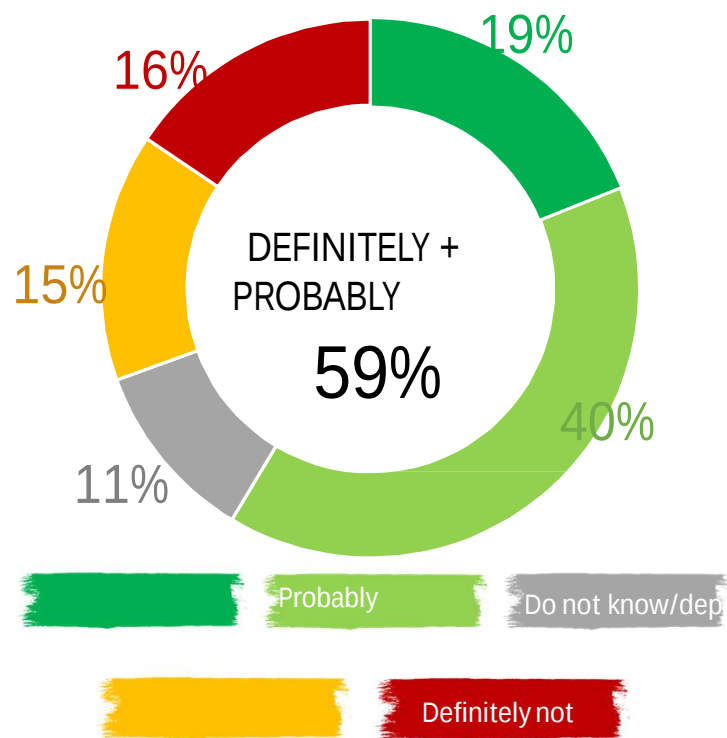
in brackets in green the % who took an outdoor holiday (n=144)



Experience of outdoor holidays

Summer holidays: *spent outdoors more than in the past by 6 out of ten Italians*

Would you say that you spent your summer holidays outdoors more than in the past as a result of the Covid-19 health emergency?

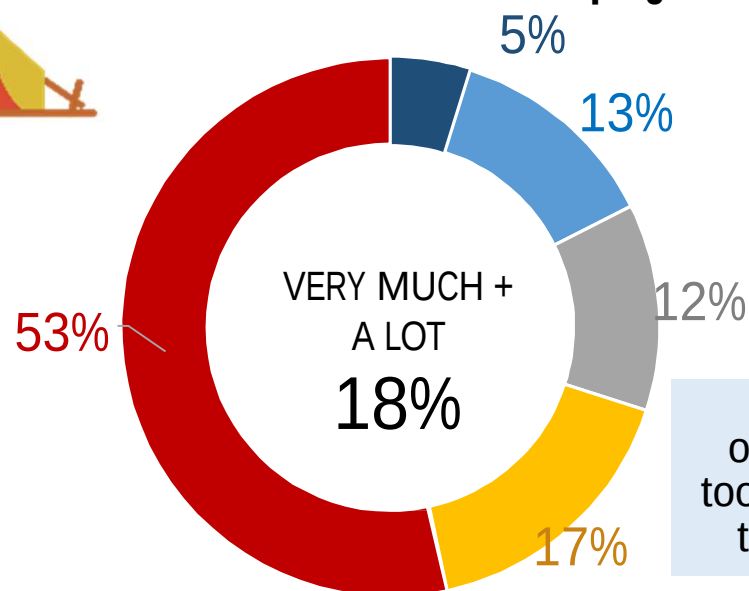
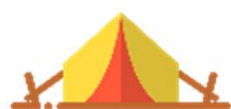


TOTAL	40%	19%	59%
HOLIDAYS IN THE SUMMER MONTHS	44%	23%	67%
OUTDOOR HOLIDAYS IN THE SUMMER MONTHS	48%	23%	71%
MEN	36%	19%	55%
WOMEN	44%	19%	63%
15-34 YEARS	40%	20%	60%
35-54 YEARS	43%	19%	62%
OVER 54 YEARS	37%	17%	54%
NORTH-WEST	41%	14%	55%
NORTH-EAST	38%	20%	58%
CENTRE	40%	18%	58%
SOUTH AND ISLANDS	39%	22%	61%
UP TO 30,000 INHABITANTS	41%		57%
30 - 100,000 INHABITANTS	33%		57%
OVER 100,000 INHABITANTS	43%		63%

Database: total sample (n=1026)

Camping: rise in the popularity of camping, which appeals to one in five Italians.

How much does the idea of a camping holiday appeal to you?

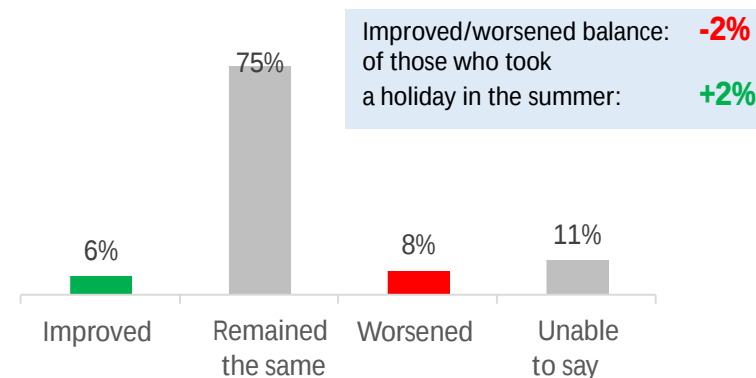


Does a camping holiday appeal to you more in the light of the Covid-19 health emergency?

Yes 11%

12% of those who took a holiday in the summer

And has your opinion of camping holidays improved this year compared to the past?

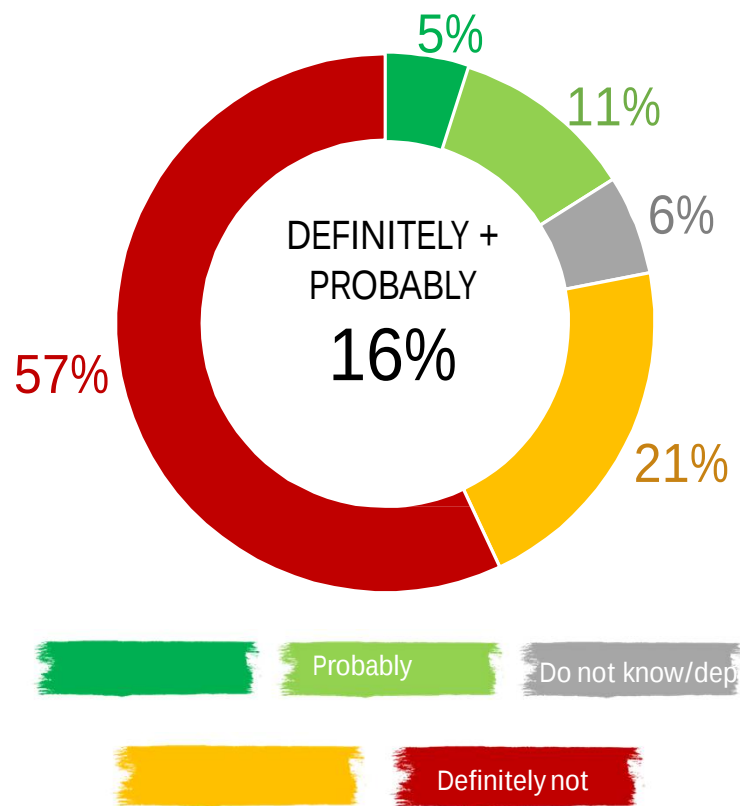


Database: total sample (n=1026)



Forecasts for autumn/ winter

Winter holiday intentions: *16% of Italians are thinking of an autumn/winter holiday*



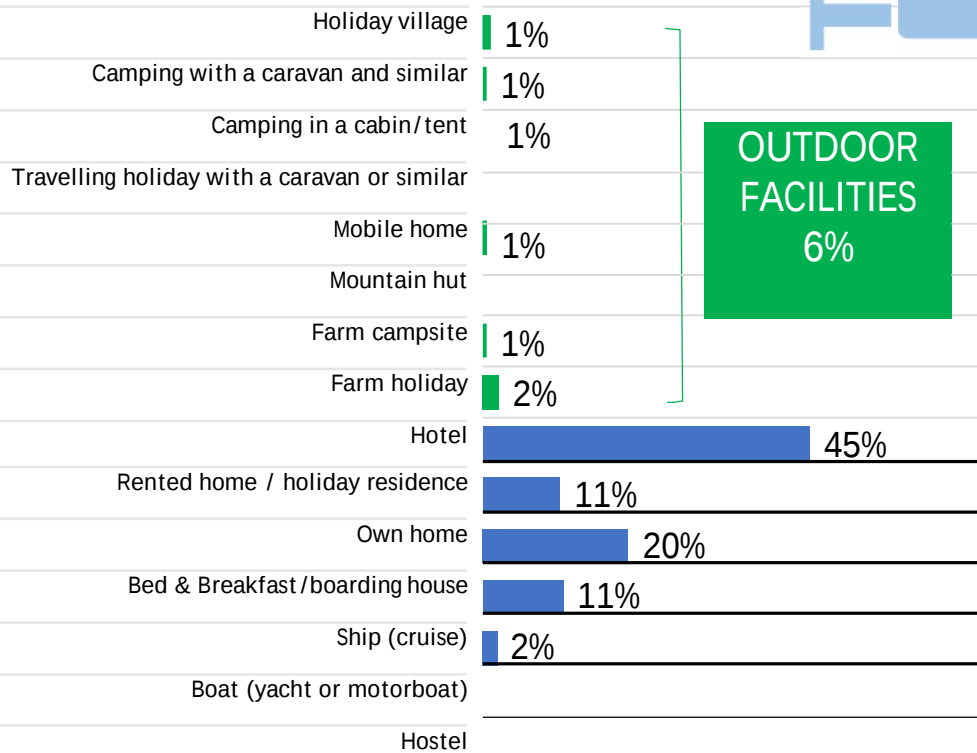
TOTAL	5%11%	16%
HOLIDAYS IN THE SUMMER MONTHS	13%21%	34%
OUTDOOR HOLIDAYS IN THE SUMMER MONTHS	14%23%	37%
MEN	5%13%	18%
WOMEN	5%9%	14%
15-34 YEARS	9%14%	23%
35-54 YEARS	4%13%	17%
OVER 54 YEARS	3%8%	11%
NORTH-WEST	5%12%	17%
NORTH-EAST	7%12%	19%
CENTRE	5%10%	15%
SOUTH AND ISLANDS	4%11%	15%
UP TO 30,000 INHABITANTS	5%	13%
30 - 100,000 INHABITANTS	3%14%	17%
OVER 100,000 INHABITANTS	7%	22%

Database: total sample (n=1026)

Destinations this winter: *mainly cultural and mountain holidays*



**OUTDOOR
FACILITIES**
6%



Art cities and cultural locations



38%

Mountains



31%

Seaside



23%

Wellness / fitness



5%

Rural / farm holidays



3%

Sports

3%

Food and wine

3%

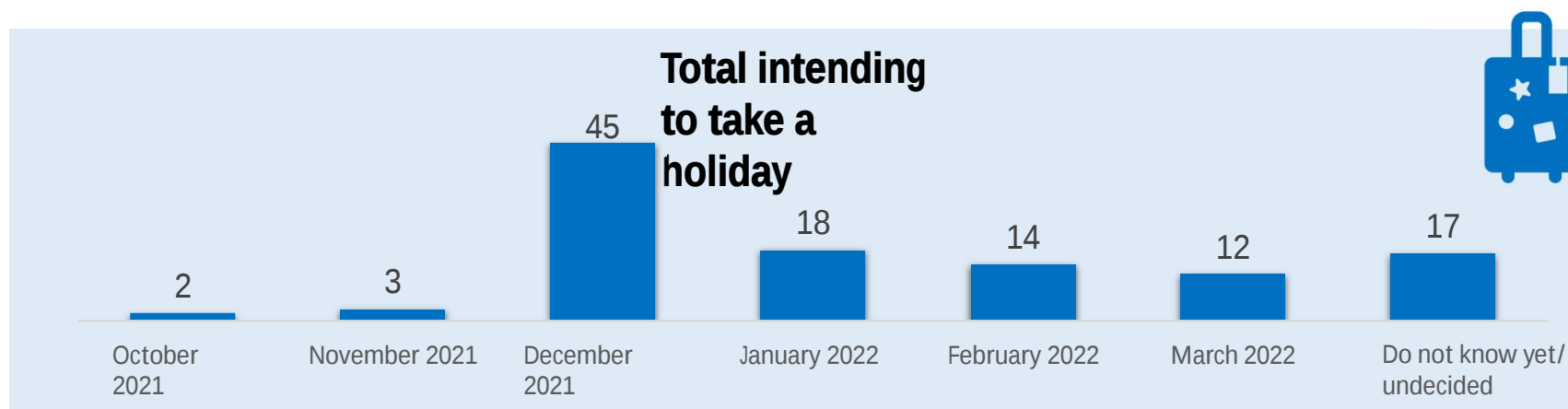
Lakes

2%

Religious places / pilgrimages

2%

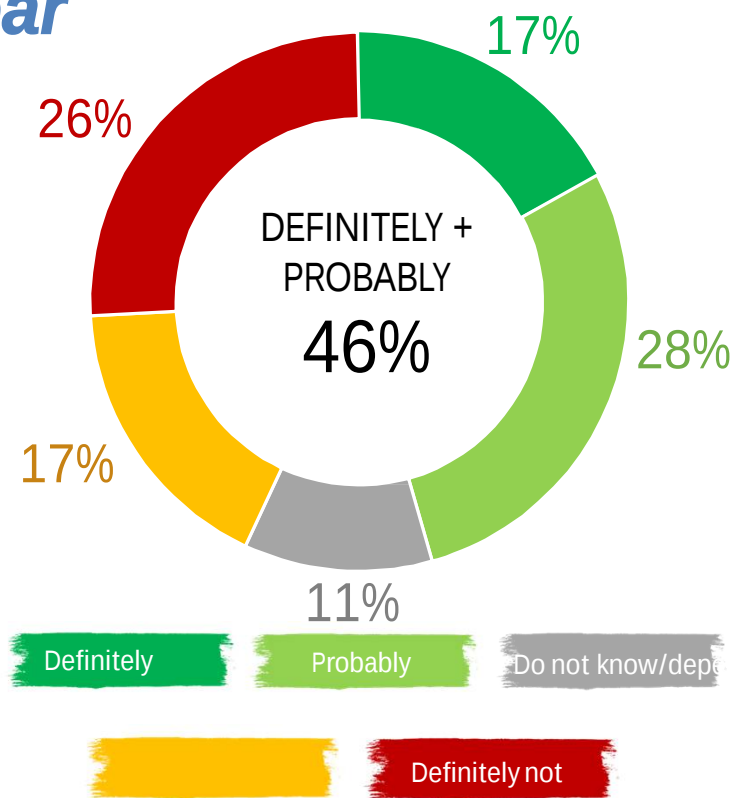
Holiday period this winter: *most popular month December*





Forecasts for summer 2022

Holiday intentions for this summer: *almost one in two Italians intends to go on holiday next summer, a very high number of those who went on holiday this year*



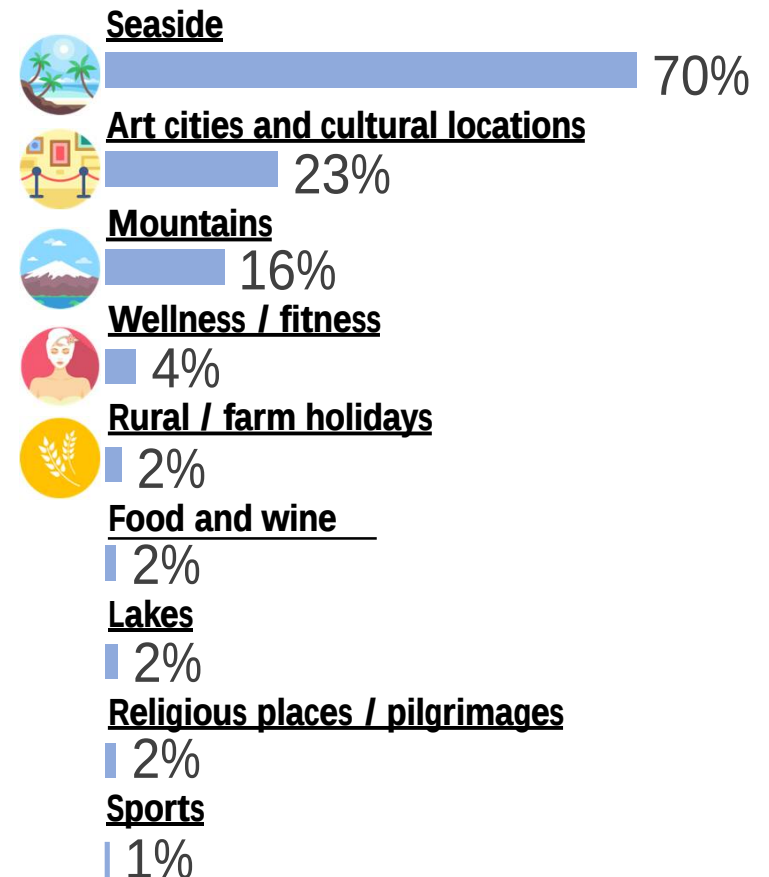
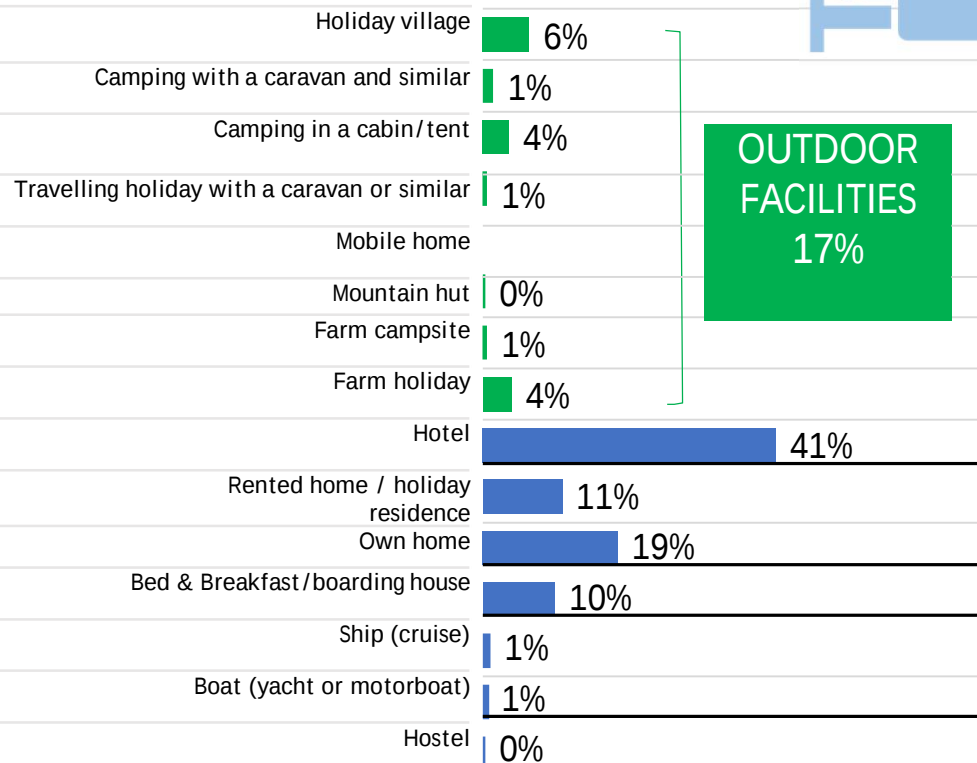
TOTAL	17%	28%	46%
HOLIDAYS IN THE SUMMER MONTHS	42%	39%	81%
OUTDOOR HOLIDAYS IN THE SUMMER MONTHS	42%	39%	81%
MEN	20%	30%	50%
WOMEN	15%	27%	41%
15-34 YEARS	27%	31%	57%
35-54 YEARS	16%	33%	49%
OVER 54 YEARS	12%	23%	36%
NORTH-WEST	18%	31%	50%
NORTH-EAST	18%	29%	47%
CENTRE	21%		48%
SOUTH AND ISLANDS	14%		41%
UP TO 30,000 INHABITANTS	14%		41%
30 - 100,000 INHABITANTS	20%		45%
OVER 100,000 INHABITANTS	23%		56%

Database: total sample (n=1028)

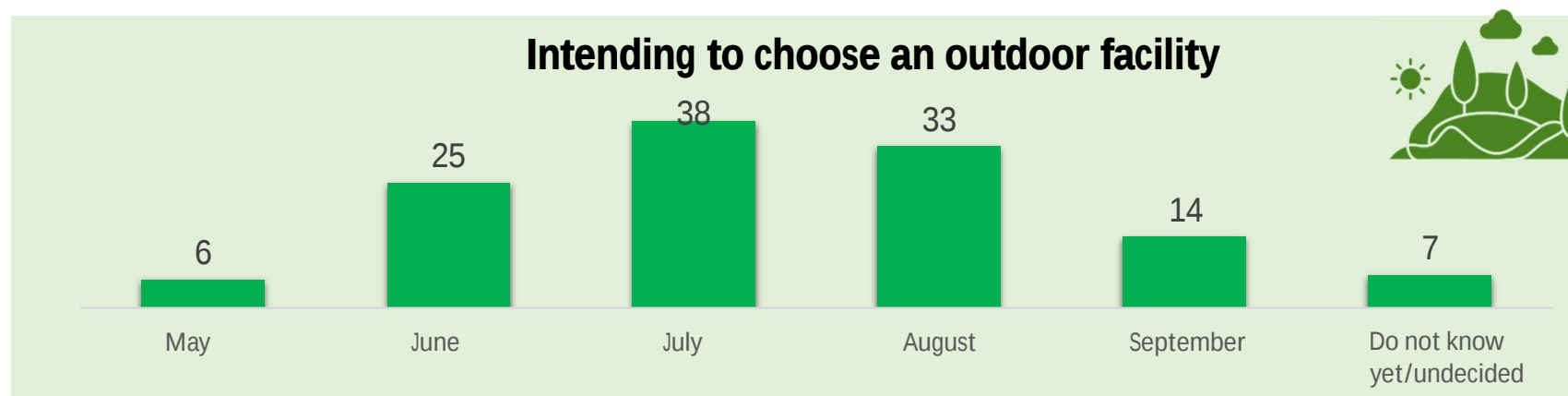
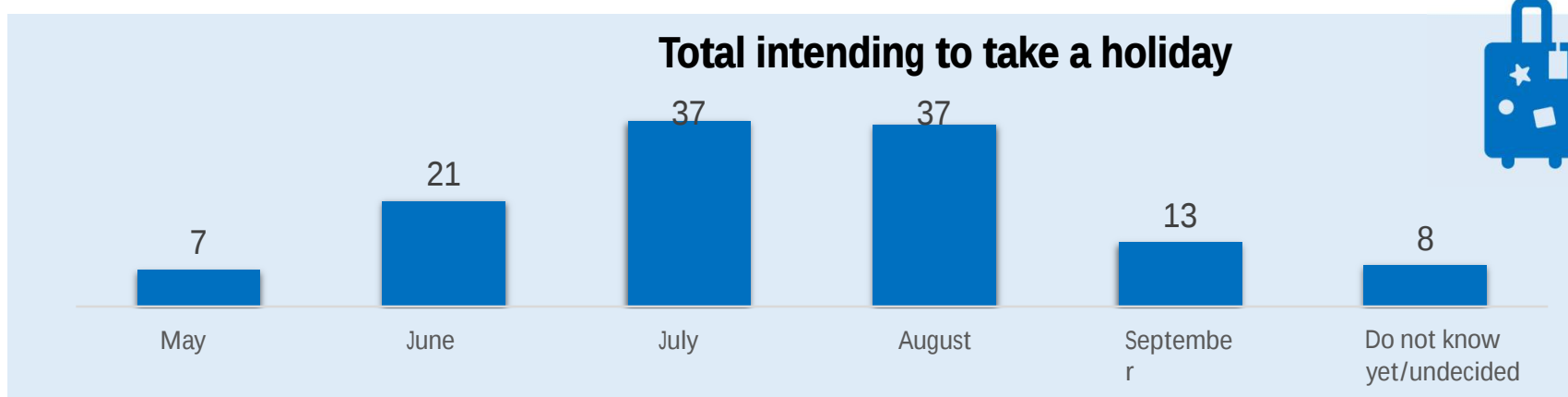
Destinations next summer: a fifth of aspiring holidaymakers intend to choose outdoor facilities



OUTDOOR
FACILITIES
17%



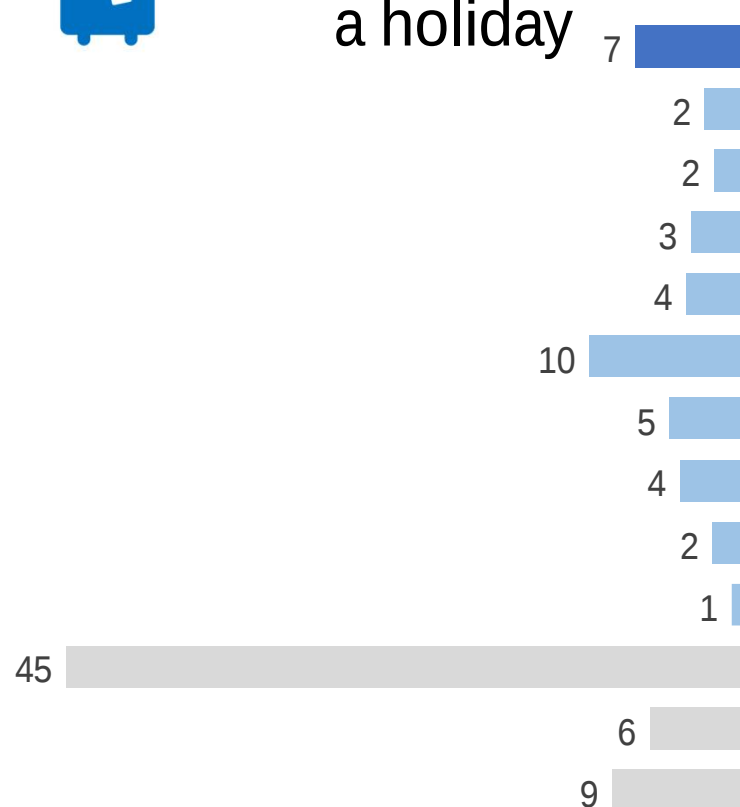
Holiday period next summer: *same high numbers intending to holiday in July and August*



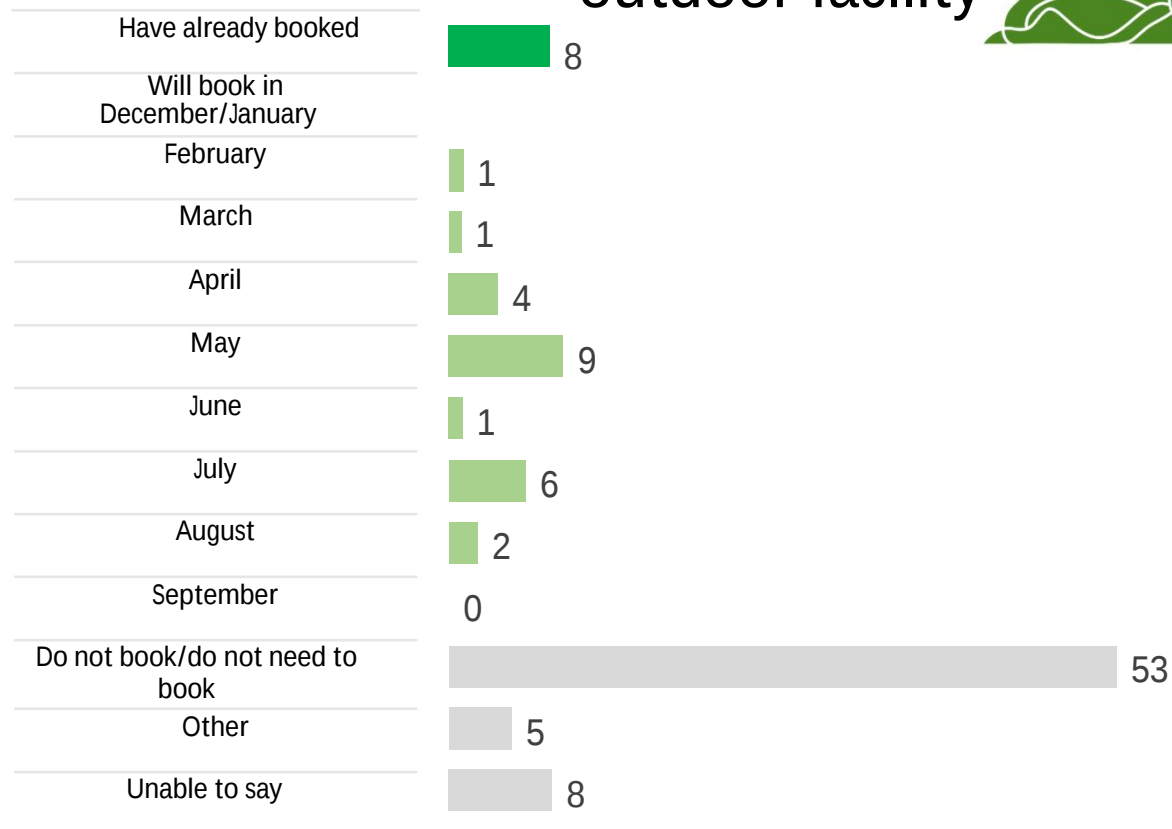
Holiday bookings for next summer: *one fifth intend to book by spring; almost a tenth say they have already booked*



Total intending to take a holiday



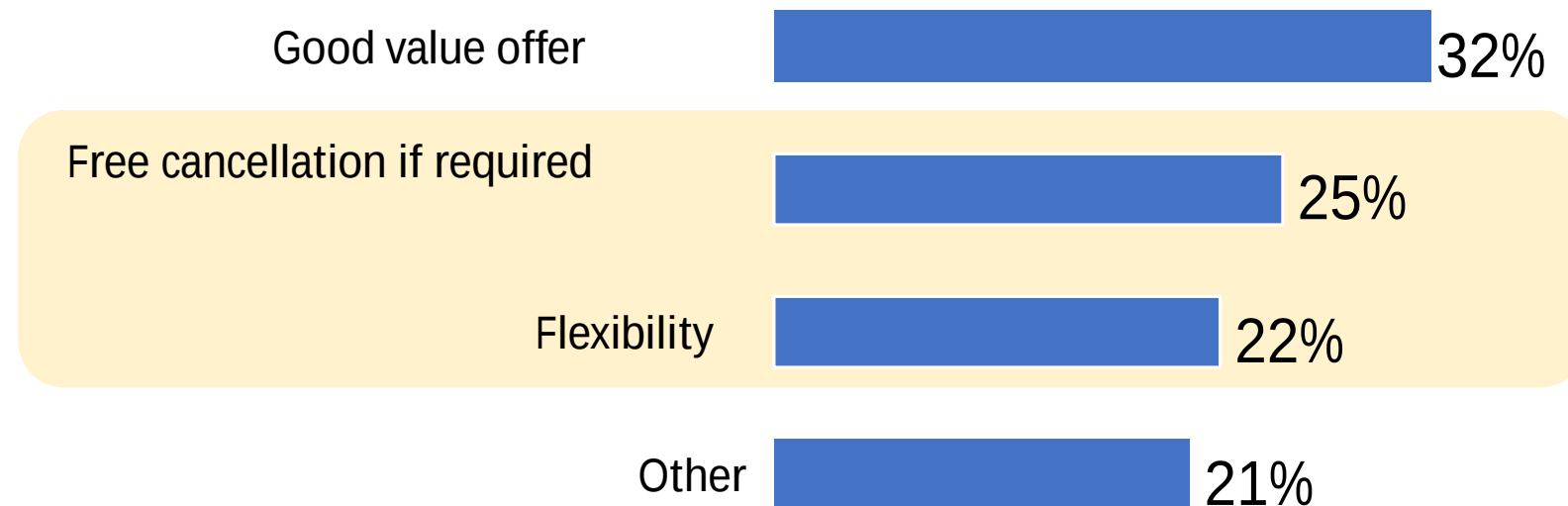
Intending to choose an outdoor facility



Database: respondents intending to take a holiday (n=468) – MORE THAN ONE ANSWER POSSIBLE

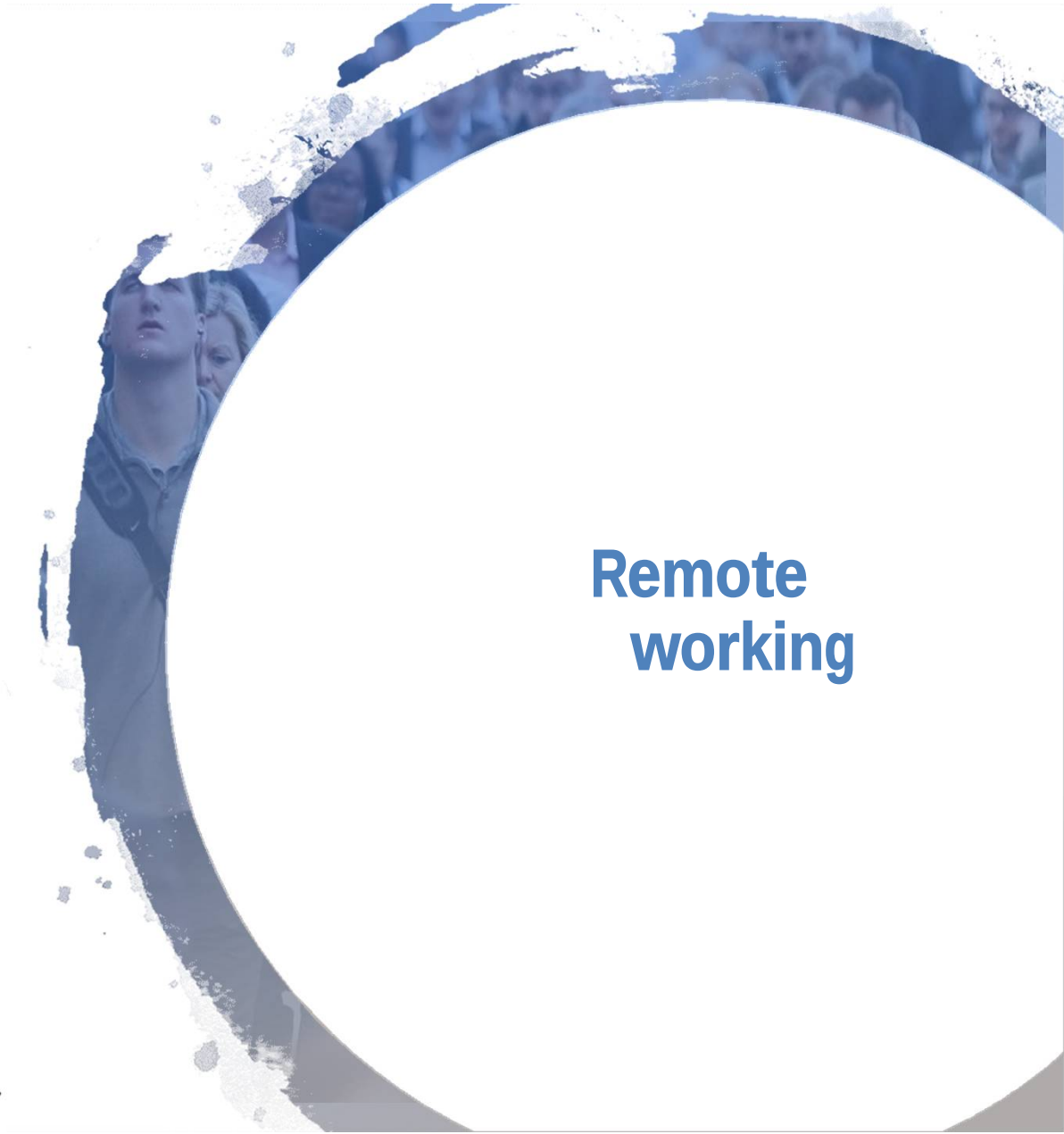
Advance holiday bookings: *the possibility to make changes to holiday plans is a decisive factor in choosing advance booking*

What could persuade you to book your summer holidays in advance?



Location of holidays next summer: *rise in the intention of Italians to travel abroad, especially if the health emergency is over*

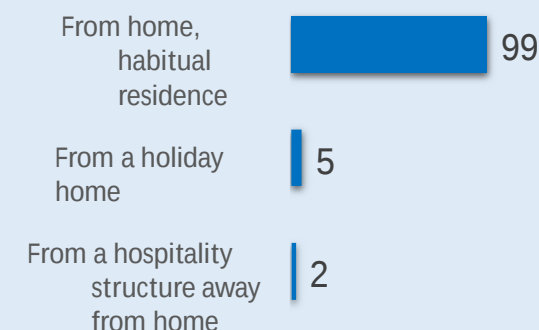
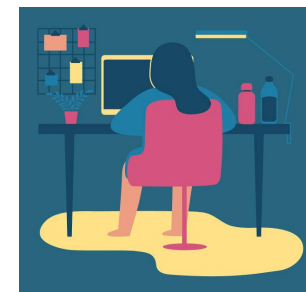
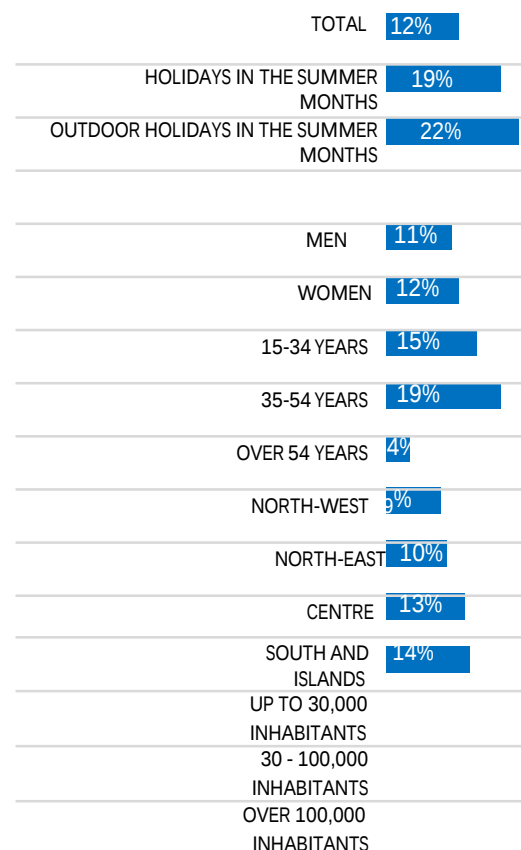
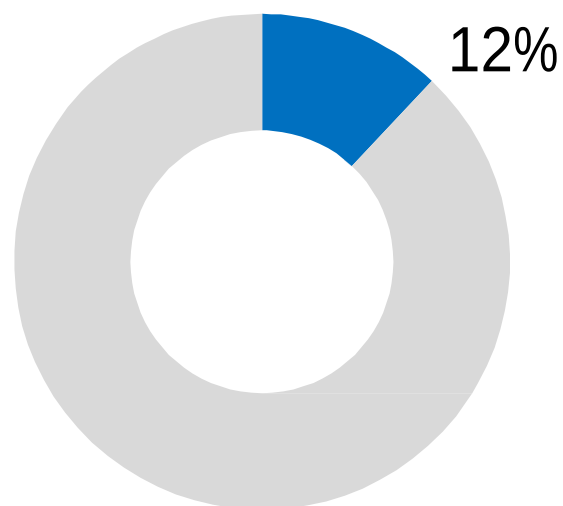




Remote working

Remote working: 12% of Italians have worked remotely during the last year, almost always from home

Number of Italians who say they have worked remotely in the last year



Database: respondents who have worked remotely (n=119) – % values

Summary conclusion

32% of Italians took at least one holiday last year, and almost half of them say they took an outdoor holiday. Outdoor holidays were slightly more likely to be taken by women, young people, and inhabitants of large cities, especially in the regions of Central Italy. 94% of holidays were taken in Italy, but this figure could have been reduced to 80% without the health restrictions due to the pandemic.

Six out of ten Italians believe Italians spent more of their summer holidays outdoors as a result of the health emergency, but camping seems to have benefited only marginally from this: popular with almost one fifth of Italians, one in ten is more likely to consider a camping holiday.

For autumn/winter 2021-22, 16% of Italians have planned a holiday, 6% of them

in an outdoor facility. For next summer, 46% are intending to take a holiday, with 17% of them intending to choose an outdoor accommodation facility.

7% of those intending to take a holiday next summer have already booked, and one fifth intends to book by spring; this number tends to decrease among those planning to choose an outdoor facility. Advance booking could be encouraged above all by flexibility on the part of accommodation facilities, by offering free cancellation for those who change their mind. 82% of holidaymakers plan to holiday in Italy, but this figure could be lower if the pandemic is over.

Remote working regarded 12% of Italians this year, 19% of them adults aged 35 - 54. 5% of

those who worked remotely did so from a holiday home, and 2% from a different type of accommodation.



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**Thank you for your
attention**