

*Academic Research Paper*

## **The impact of the COVID-19 Pandemic on accommodation preferences in Italy: a temporal and geographical analysis (2018-2022)**

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**Abstract:** The spread of the Coronavirus has triggered a global crisis, significantly altering global geopolitical balance. The pandemic has profoundly disrupted the performance of the global economy, causing disruption and losses in all sectors. Once the lockdown period was over, economic production and the labor market began a delicate process of adaptation to new conditions. The tourism sector, due to the restrictions imposed to reduce national and international flows, has suffered a significant impact and has been forced to reinvent itself through new travel methods. This study aims to analyze the adaptation of the tourism sector, with attention to preferences relating to accommodation facilities. The analysis focuses on the partial replacement, during the holiday organization phase, of traditional hotel establishments with more open-space solutions, such as campsites and tourist villages. The data provided by ISTAT as part of the Occupancy in tourist accommodation establishment, relating to the period 2018-2022, is used. This time frame includes the years before the pandemic, the years characterized by the spread of the virus and the subsequent recovery period. At first, the situation at national level during the years considered is examined. Subsequently, the analysis is deepened at a regional level, in order to understand the trend in the four Italian geographical macro-areas: Northern Italy, Central Italy, Southern Italy and Insular Italy. This subdivision allows us to precisely identify the regions that follow a trend in line with the national one and those that deviate from it. The main objective of the study is to analyze consumers' choices during the pandemic, investigating whether the latter has actually permanently changed their preferences, or whether we are witnessing a return to habits prior to the health crisis. Through this analysis, we intend to provide a detailed and articulated vision of the impact of the pandemic on Italian tourism dynamics, contributing to the understanding of the changes taking place in the sector and future prospects.

**Keywords:** *COVID-19, Tourism, accommodation facilities, occupancy, geographical analysis*

**JEL Codes:** L83, Z32

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## **1. Introduction**

Holidays during the COVID-19 pandemic have brought significant challenges and changes to the way people plan and enjoy their trips. With travel restrictions, health protocols and safety concerns, the vacation experience has been profoundly redefined.

In this article, people's response to new tourism regulations and changes in accommodation preferences will be analyzed, in order to outline a general picture of how individuals have attempted to maintain holiday-related wellbeing over a period of global uncertainty. The closure of numerous communities and the implementation of major border restrictions has virtually crushed the tourism economy in communities around the world (Goodwin, 2016).

On the other hand, it has been demonstrated that infectious diseases, the cause of mortality and social apprehension, have long exerted important selective forces on politics, society, the economy and human attitudes towards the environment (Wolfe et al., 2007).

The analysis will initially be carried out on a generic national level, subsequently the picture of each region will be shown in detail based on the North, Centre, South and Islands groupings.

The years analyzed are those before the Covid-19 pandemic (2018/2019), those in which the pandemic developed (2020/2021), years in which the framework of the global tourism system went from a situation of "overtourism" to one of "non-tourism" (Corbisiero & Ruspini, 2018) and 2022, the year following the pandemic, in which it seems that the situation has tended to return to normal.

The article highlights that, due to the pandemic, a preference has emerged for camping and tourist villages, which has been detrimental to the hotel establishments. Currently, campsites and tourist villages represent 30% of what Italian tour operators offer and have seen a constant growth in their market share over the years. What was once considered a minor product, has recently been appreciated by an increasingly wider range of audiences, thanks to the evolution of the product itself. More refined structures, increasingly diversified services, discreet entertainment, ease of socialization, all-inclusive formulas, possibility of excursions and excellent locations, together with a segmentation aimed at the needs of the different target customers, have decreed the success of these structures (Garibaldi, 2006).

It is clear how critically the tourism industry has been affected by the COVID-19 pandemic. Travel restrictions, social distancing measures and health concerns have caused a significant reduction in international and domestic travel. The impact of the pandemic on tourism has led to a notable crisis in the sector, due to the decrease in tourist flows and changes in travellers' behaviour, with a growing demand for outdoor travel and necessary adaptations in the tourism industry. The literature on the relationship between the Coronavirus pandemic and tourism provides a disarming picture of the impacts on air travel, cruises and reservations in accommodation facilities (Gossling et al., 2020).

In summary, COVID-19 has had a significant impact on the tourism industry, but the sector is adapting and seeking to recover by implementing safety measures and adapting to travellers' new needs and preferences.

To fully understand the context of this article, it is necessary to refer to the ATECO code, the classification system used to categorize economic activities based on their nature and sector to which they belong. The analysis is based on tourism businesses, in detail data on accommodation is used, identified by the ATECO code 55: hotels and similar structures, holiday accommodation and other structures for short lodging, camping areas and areas equipped for campers and caravans, other accommodations.

The analysis is based on the examination of one of the main indicators of the tourism sector, provided by ISTAT, namely tourist nights spent: the "number of nights spent by tourists, Italian and

foreign, in all types of accommodation establishments".

Within this scenario, the following paper will discuss.

First off the article provides a quick reflection on the impacts of Covid-19 on tourism, the introduction then references literature, the section following relates to data and analysis methodology, which highlights the ISTAT investigations used to collect data primarily at a national level and subsequently at a regional level, which provide a significant amount of information, which provide a significant amount of information that allows a sufficient comparison to be made between nights spent in non-hotel formulas (campsites/tourist villages) and nights spent in hotel establishments, the fourth section highlights the results achieved by the comparison and, finally, the fifth section concerns conclusions and discussions.

## **2. Literature review and theoretical framework**

The tourism sector has now recovered after the Covid crisis, which had effectively blocked, or greatly reduced, travel between countries and within the Italian regions themselves. In this scenario, regions such as Emilia-Romagna, Tuscany, Lazio, Marche, Umbria and Abruzzo are no exception: all indicators, from arrivals to expenditure on foreigners through employment, have a positive sign. However, the pandemic has left a significant effect on all the entrepreneurial networks of these territories. Many businesses, especially smaller ones, closed and never reopened. However, the companies that managed to survive have become more structured and stronger, and therefore more resistant to possible future crises (Marini, 2024).

The pandemic has inevitably changed and will continue changing the way of traveling and the entire tourism industry: The Italian Touring Club (2020) highlighted how, during COVID-19, destinations closer to the place of residence were preferred (72%) - the so-called "proximity tourism" - and more prudent behaviours were adopted to reduce the risk of contagion: fewer events and museums compared to previous years (67%), preference for lesser-known and presumably less crowded destinations (59%), with a lower frequency of bars and restaurants (58%). Proximity tourism is, in fact, a form of local tourism that has become popular following the Covid-19 pandemic. A form of tourism dedicated to the exploration of destinations close to home and to the discovery of the territories of one's own region, or of the immediately neighbouring regions.

The tourism phenomenon is extremely sensitive to all potential dangers, real or perceived, amplifying any sign of insecurity (Maeran, 2004). Unfortunately, the risk caused by the presence of the COVID-19 virus on the environment was real, as well as perceived.

During the pandemic, significant changes were foreseen on a tourism level: according to research by Wachyuni and Kusumaningrum (2020), once the pandemic was over, people would have wanted to travel, but taking aspects such as safety and cleanliness into extreme consideration. It then occurred that the preference for trips that allow one to be surrounded by nature increased, and the number of Covid-19 cases naturally influenced this, and continues to do so, on the choice of destination. Health safety has played and continues to play a primary role in post-pandemic tourism.

Nowadays, the psychological consequences of the pandemic, together with a change in attitude towards tourism, affect the tourist experience at every level: from the decision to go on holiday, especially when it comes to the choice of destination, from the information sought in the decision-making process, motivational factors and risk perception.

Research by Corbisiero and Monaco (2021) on Italian tourism highlighted that people want slower and more safe tourism, in the open air and contact with nature, away from cities characterized by mass

tourism. It is suggested that there will be greater attention to safety and hygiene when choosing the destination or tourist facility, and that communication with tourists must be transparent and clear, especially regarding cancellations and refund rules.

A desire to immerse oneself in nature and seek green destinations far from mass tourism has been rediscovered. The main motivation could be the desire to stay in outdoor places and maintain interpersonal distances, minimizing the possibility of contagion; but the regenerative effect that nature offers must also be considered. The so-called "green tourism" offers tourists the opportunity to make the most of the restorative characteristics of nature, moving away from routine and familiar places, exploring and being fascinated by natural environments, alleviating the cognitive overload and mental fatigue caused by the long period of lockdown and pandemic.

"Regenerative environments" are those that promote psychological and physiological recovery from stressful situations, such as cataclysms, daily problems and stressful life events. The global pandemic clearly represents one of these situations.

As already anticipated, on an economic level, the tourism industry was the one that, without a doubt, suffered the greatest repercussions, due to the lack, if not even the absence in some periods, of mobility of visitors from all over the world (Meglioli & Manente, 2020). On the other hand, the tourism industry is in fact strongly conditioned by external events, and tourist flows are highly sensitive to the health and safety conditions of the destination countries (Prideaux & Sinclair, 2003).

The tourism sector has faced several crises, not only due to past pandemic events such as SARS (Severe Acute Respiratory Syndrome) and H1N1 (a subtype of influenza A virus), but also due to natural disasters. Some experts like Rosselló have examined the main effects of such events on tourist arrivals. Studies on the consequences of natural disasters, such as earthquakes and tsunamis, highlight a significant contraction in tourist flows in the affected areas.

For example, Rosselló (2020), using data relating to natural disasters, man-made crises and international tourist flows, shows a declining trend in tourist arrivals as a short-term side effect of these events. In particular, the author argues that this decline derives from the objective impossibility of the tourism industry to operate and from the perception of risk by tourists.

Similar results emerge from the analysis of Ma and Chiu (2020), who focus on the impact of earthquakes and terrorist attacks on tourist flows, showing that the former exert more significant negative consequences than the latter. However, the effects are heterogeneous and depend not only on the type of disaster considered and its intensity, but also on the responses of governments. Therefore, many authors highlight the need for the tourism industry to develop a "disaster planning framework" to accelerate the recovery process (Murphy & Bayley, 1989; Prideaux, 2004).

In addition to natural disasters and man-made crises, numerous epidemic and pandemic events have marked the history of humanity, causing negative impacts on the economy in general and on the tourism sector in particular. This is not the first time a coronavirus has affected the global community. In fact, we remember the SARS 2003 and the Middle Eastern Respiratory Syndrome (MERS, 2012).

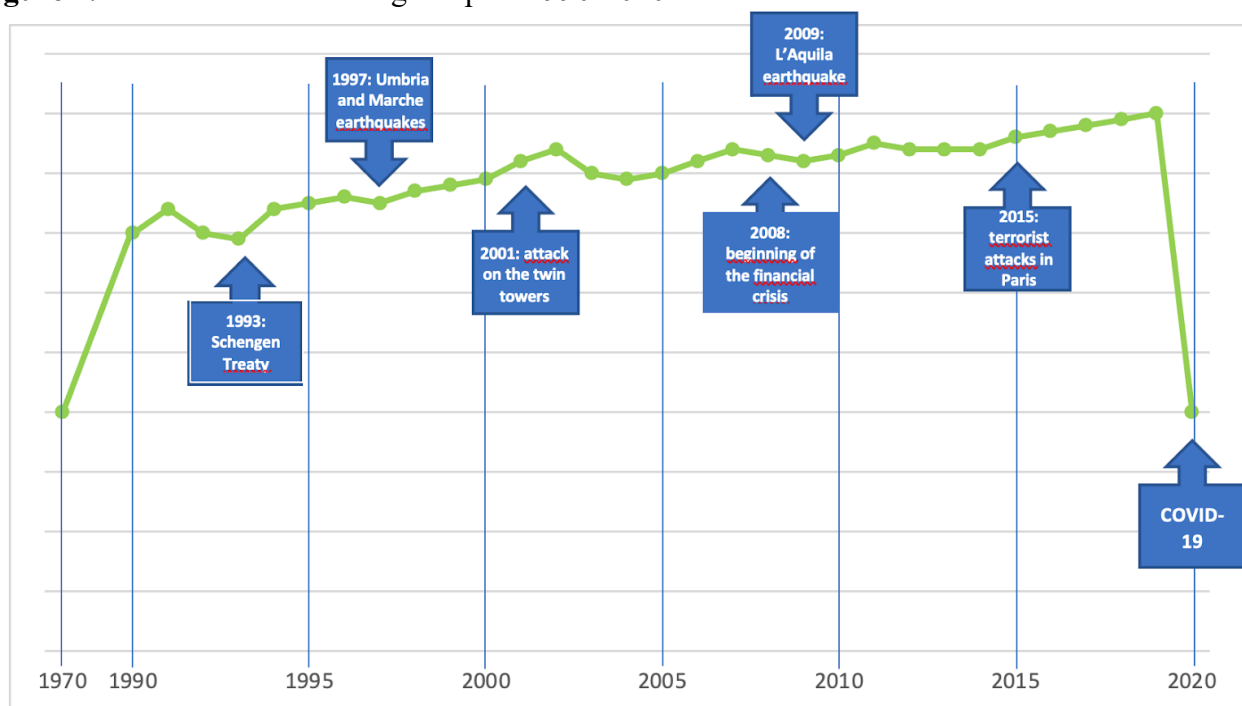
The COVID-19 emergency represents the third event of this type that has taken the world by surprise. Although tourism has faced various crises over the years, including economic and financial crises, geopolitical instabilities, terrorism, wars, natural disasters and pandemics, the recent crisis is unprecedented. No past crisis, not even those caused by pandemics, has had such profound repercussions and affected all countries in the world so uniformly (Mingotto & Tamma, 2021).

From the following graph we can see that, in the last 30 years, no event has had such a significant impact on tourist presences in Italy like the COVID-19 pandemic. The graph, taken from the research

and business intelligence company "Thrends", clearly shows the influence of COVID-19 on tourist night spent: in the months of April/May 2020, the level of night spent fell to around 150 million, a figure which in Italy hasn't been seen since the 70s. Coronavirus contagion, therefore, represents the greatest challenge the contemporary world has had to face in recent centuries, so much so that it led the WHO to declare a "pandemic" (WHO, 2017), a term that had been most commonly used to describe new diseases or associated with new variants of existing organisms as seen during the HIV-AIDS pandemic of the early 1980s (Vasilakis & Weaver, 2008). The graph has a very strong impact, but the fluctuation in the level of nights spent is often not linked only to the event in question. For example, it is a coincidence that the Schengen Treaty, in 1993, corresponds to a decrease in nights spent lodging by a tourist.

Below are the international events that most influenced nights spent by tourist from 1990 to 2020.

**Figure 1.** International tourist nights spent 1990-2020



Source: Trends, 2020

### 3. Materials and methods

According to ISTAT (Italian National Statistics Institute) findings ("Occupancy in tourist accommodation establishment"), in 2019 arrivals in Italian accommodation establishments (hotel and non-hotel establishments) were 131.3 million, of which 65 million from residents abroad (49.5 %) and 66.3 million from residents in Italy (50.5%). Furthermore, a total of 436.7 million nights spent were recorded, made up of 220.6 million nights spent by residents abroad (50.5%) and 216 million nights spent by residents in Italy (49.5%).

In 2020, the ENIT (Italian State Tourist Office) Research Office forecast a decrease in international and national visitors of almost 57 million compared to 2019, with a reduction in total tourist overnight stays of 186 million (140 million less from international tourists and 46 million less from Italian tourists), and a contraction in tourist spending of almost 71 billion euros (27.3 billion less from foreign tourists and 43.6 billion less from Italian tourists). Therefore, the total contribution of the

Travel and Tourism sector could have decreased by 5.8 percentage points, going from 13% of GDP in 2019 to 7.2% in 2020 (Angeloni, 2021).

The objective of the analysis is to compare the data relating to nights spent in hotels and campsites/tourist villages. It is interesting to analyse how the recovery of activities is taking place in the years following the pandemic, to understand whether consumer preferences are changed as a result of COVID-19 or if certain trends were solely the result of the influences of the pandemic.

The analysis is based on the examination of one of the main indicators of the tourism sector, provided by ISTAT, namely tourist nights spent: the "number of nights spent by tourists, Italian and foreign, in accommodation establishments. This term is commonly used in the tourism industry to measure the flows of visitors to a certain area or accommodation facility, such as hotels, resorts, campsites, etc.

The following data has been extrapolated from the ISTAT survey "Occupancy in tourist accommodation establishment", a survey which quantifies, for each month and for each municipality, the arrivals and nights spent of tourists (residents and non-residents) according to the category of establishment and the type of structure, as well as according to the foreign country or Italian region of residence. Information is also collected that allows the calculation of occupancy rates of beds and rooms for hotel facilities.

The survey, carried out on a monthly basis, responds to the dictates of EU Regulation no. 692/2011 of the European Parliament and of the Council relating to European statistics on tourism, amended by EU Delegated Regulation no. 2019/1681 of the Commission of 1 August 2019, published in the Official Journal of the European Union of 9 October 2019, with application from 1 January 2020.

The survey is total, and ISTAT makes use of the collaboration of the statistical offices of the Regions and Autonomous Provinces, which can make use of the competent offices in tourism matters at a regional, provincial or sub-provincial level. Every year, ISTAT sends the intermediate bodies a detailed circular with all the indications for conducting the survey, including the information for the accommodation facilities signed by the President of ISTAT and a letter format for the presentation of the survey which intermediate bodies can send to the structures.

The data on the daily occupancy by tourists, communicated by the operators of the accommodation facilities, are collected and summarized monthly, with municipal detail, in electronic format according to the record layout corresponding to the MOV/C model by the intermediate bodies responsible for the survey. The latter forward them to ISTAT via the certified and protected Indata site.

The survey units are the accommodation establishments divided between: hotel establishments (ATECO 55.1) , which include, in addition to hotels in the strict sense, classified in five categories marked by stars in decreasing order, also tourist-hotel residences and non-hotel establishments, such as campsites and tourist villages (ATECO 55.2) , mixed forms of camping and tourist village, rental accommodation managed in a business manner, farmhouses, youth hostels, holiday homes, mountain refuges, other accommodation facilities not elsewhere classified (n.a.c.), bed & breakfasts and other private accommodation.

The comparison between hotel establishments and campsites/tourist villages will be carried out on nights spent before COVID-19 (2018/2019), during COVID-19 (2020/2021) and after COVID-19 (2022).

#### **4. Results**

According to the ISTAT Report "Viaggi e vacanze in Italia e all'Estero", travel by Italians in 2020 reached an all-time low: 37 million and 527 thousand (231 million and 197 thousand overnight stays), with a decline in holidays of 44.8% compared to 2019. As regards summer holidays alone, almost 7 people out of 100 gave up summer holidays in 2020.

The report highlights that among the accommodation facilities, the ones most affected by the sharp decline in overnight trips were hotels. Things went much better for campings and tourist villages, even if in 2020 the preferred solutions were rooms or homes for rent and bed & breakfasts.

**Table 1.** Percentage of incidence of campsites/tourist villages on hotel establishments, comparison 2018/2019/2020/2021/2022.

PERIOD	HOTEL ESTABLISHMENTS (NIGHTS SPENT)	CAMPINGS AND HOLIDAY RESORTS (NIGHTS SPENT)	%
2018	279.470.236	66.774.395	23,89%
2019	280.937.897	66.844.384	23,79%
2020	123.266.144	37.516.650	30,44%
2021	169.536.228	54.618.034	32,22%
2022	252.663.840	67.258.772	26,62%

*Source: Author elaboration by Istat's latest data available*

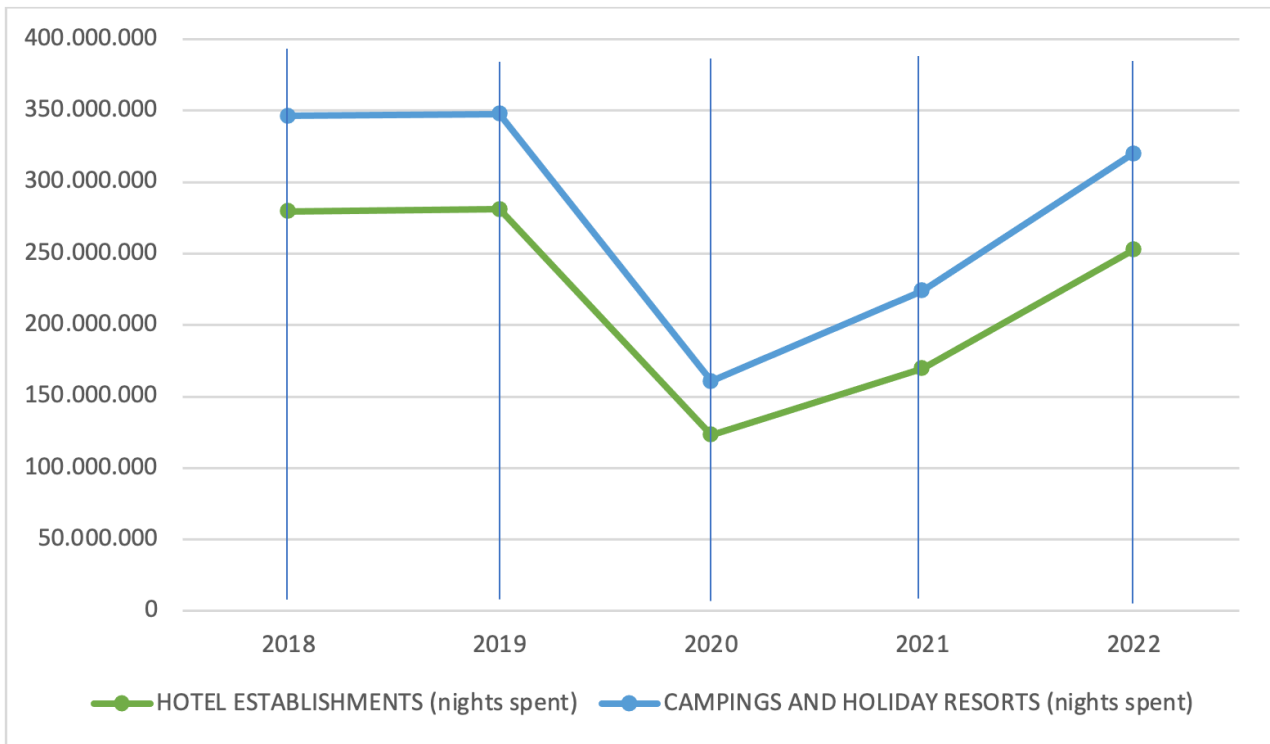
From the analysis of the data, a rather linear trend emerges in the impact of campsites and tourist villages on hotel establishments in the years 2018 and 2019. In 2019, the year taken as a reference since it was not yet influenced by the consequences of the pandemic, the nights spent recorded in hotel establishments exceed by far those of campsites and tourist villages, with a ratio of 280,9 mln to 66,8 mln nights spent, recording a difference of 214 mln overnight stays in favour of hotel establishments. In 2019, campsites and tourist villages accounted for 23.79% of nights spent in hotel establishments.

In 2020, a period marked by events caused by the COVID-19 pandemic, attendance decreased in both cases, with a ratio of 123,2 mln to 37,5 mln attendance, recording a difference of 85,7 mln overnight stays in favour of hotel establishments. In that year, campsites and tourist villages accounted for 30.44% of the nights spent in hotel establishments. The percentage data shows that campsites and tourist villages increase their incidence compared to hotel facilities and suffer a significantly lower decrease in attendance compared to the latter.

In 2021, attendance increases in both cases. Safety measures have become the prerogative of every type of service offered, infections have stabilized and people's worries have eased. The presences recorded in hotel establishments once again exceed those of campsites and tourist villages, with a ratio of 169,5 mln to 54,6 mln nights spent, recording a difference of 114,9 mln overnight stays in favour of hotel establishments. In 2021, campsites and tourist villages cover 32.22% of presences in hotel establishments, highlighting an increase compared to both 2019 and 2020.

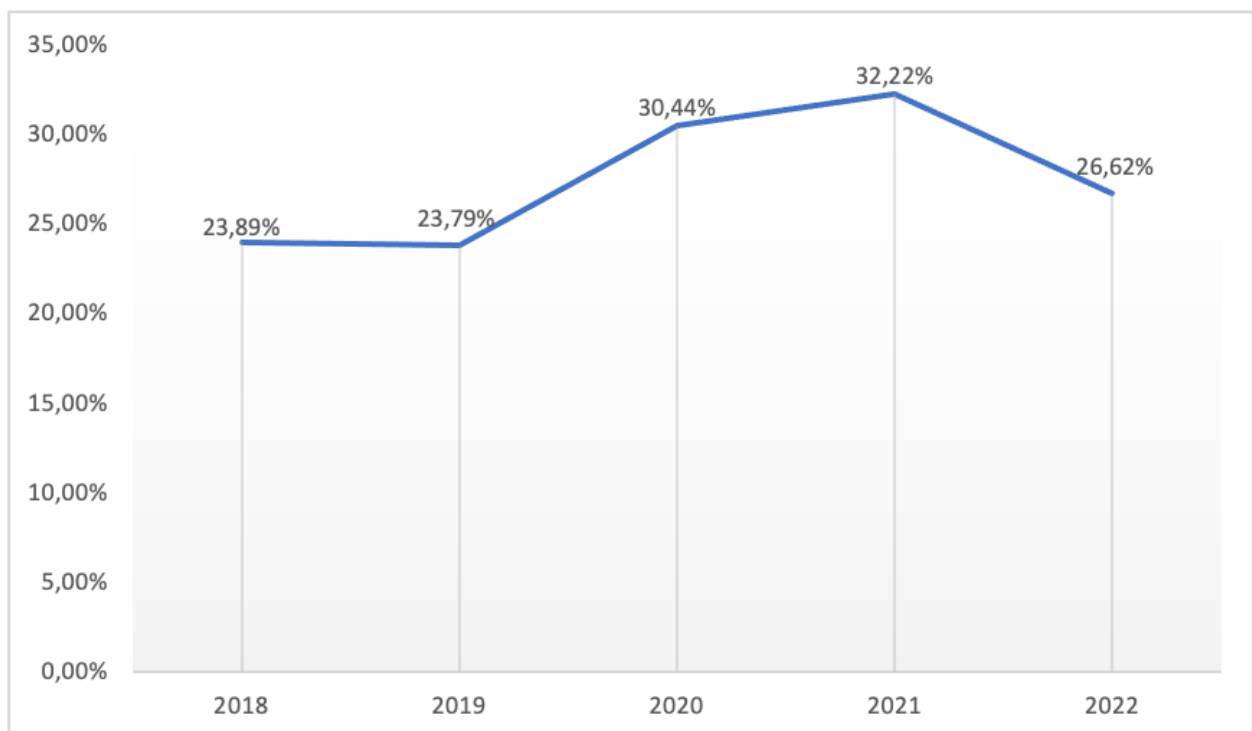
In 2022, a decrease in the incidence of campsites and tourist villages is observed compared to 2021. However, the data reveal a tendency to prefer campsites and tourist villages even higher than in pre-pandemic years, where the average incidence was 24, (2018-2019). In 2022, in fact, the incidence is 26.62%.

**Figure 2.** Comparison of hotel and campsites/tourist villages nights spent, 2018-2022



Source: Istat, latest data available

**Figure 3.** Incidence of presences in campsites/tourist villages on hotel establishments %, (2018-2022)



Source: Istat, latest data available

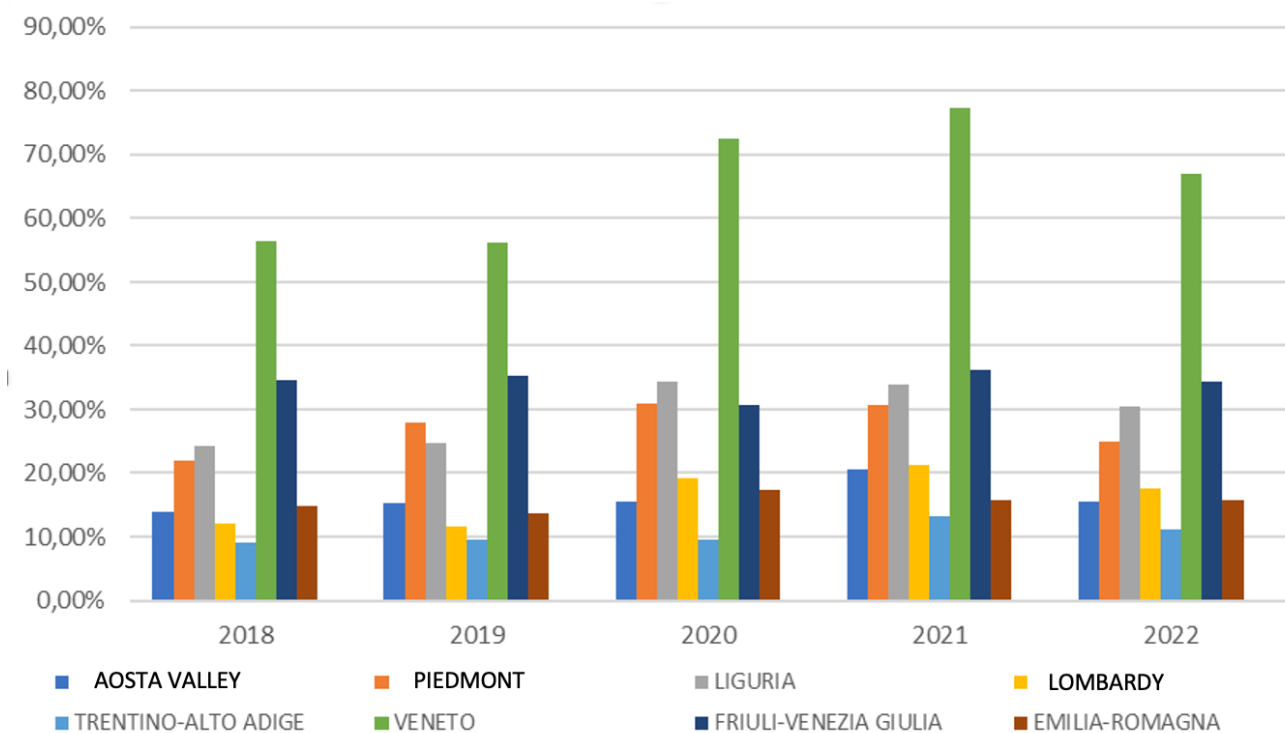
At the regional level, the data varies slightly depending on the analysis area. To carry out a more



detailed study, it is essential to divide the Italian regions into macro-areas. In this case, the distribution was made as follows: Northern Italy which includes the regions of Valle d'Aosta, Piedmont, Liguria, Lombardy, Trentino-Alto Adige, Veneto, Friuli-Venezia Giulia and Emilia-Romagna; Central Italy, made up of Lazio, Marche, Tuscany and Umbria; Southern Italy, which includes Abruzzo, Basilicata, Calabria, Campania, Molise and Puglia and, finally, Insular Italy which includes the regions of Sicily and Sardinia.

The following graph shows the trend in the percentage incidence of campsites and tourist villages compared to hotel establishments in the years pre-COVID-19, during the pandemic and post-COVID-19, in Northern Italy.

**Figure 4.** Incidence of nights spent in campsites/tourist villages on hotel establishments in the Northern Italy section %, 2018-2022

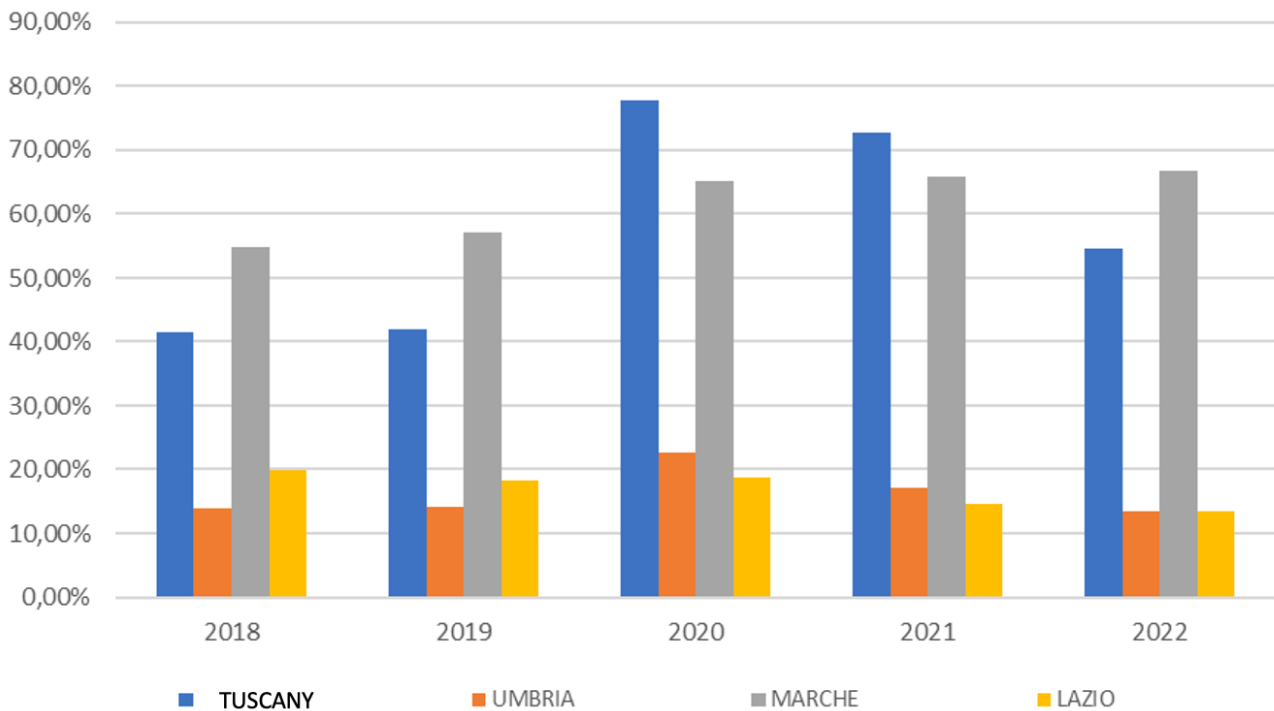


Source: Istat, latest data available

The observations that can be made in relation to the previous graph are the following: in 2018 and 2019, the trend in tourist nights spent was linear in all regions. In 2020, during the period marked by the events linked to the COVID-19 pandemic, there was a decrease in attendance in both cases, but campsites and tourist villages gained a greater percentage incidence compared to hotel facilities. In 2021, campsites and tourist villages saw a further increase in the percentage incidence, exceeding the data relating to both 2019 and 2020, with the exception of Emilia-Romagna and Liguria, where the percentage incidence of these structures compared to hotel establishments remained substantially stable compared to 2020. In 2022, in all the regions of Northern Italy, a decrease in the incidence of campsites and tourist villages was observed compared to 2021. However, the tendency to choose campsites and tourist villages remained higher than pre-pandemic years in all regions.

As regards Central Italy, the situation is as follows:

**Figure 5.** Incidence of nights spent in campsites/tourist villages on hotel establishments in the Central Italy section %, 2018-2022



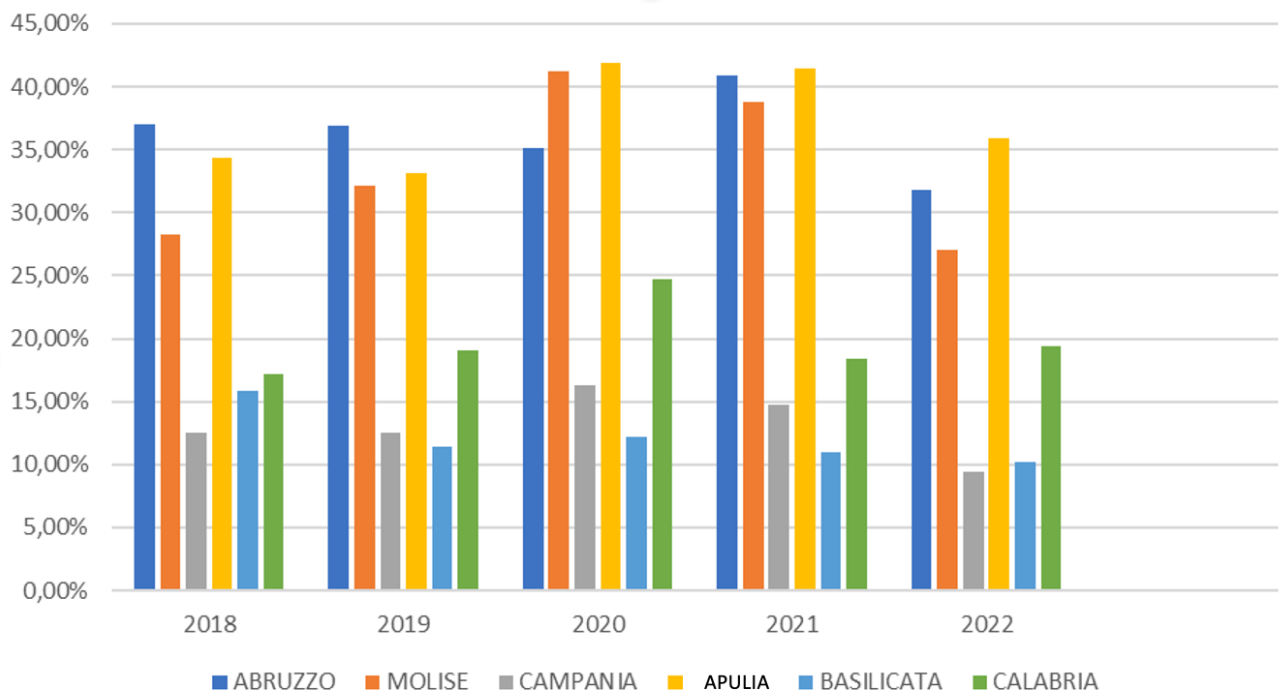
Source: Istat, latest data available

The results differ from Northern Italy, especially in the case of Marche and Lazio: in Lazio, in fact, the percentage incidence of campsites and tourist villages compared to hotel establishments in the post-COVID-19 period fell to 13.33%, a figure lower than the pre-COVID-19 situation, when it stood at around 19.00%.

This result can be explained by the presence of Rome, which, being a city of art, attracts international tourism more interested in hotels as a type of accommodation, rather than holidays in campsites and tourist villages. In the Marche, however, in 2022 an even higher percentage of campsites and tourist villages on hotel establishments was recorded compared to the COVID-19 years, with a figure of 66.72% compared to approximately 55.00% recorded during the pandemic.

In the South, most of the regions follow a trend that differs from the general scenario, with the exception of Apulia and Calabria:

**Figure 6.** Incidence of nights spent in campsites/tourist villages on hotel establishments in the Southern Italy section %, 2018-2022

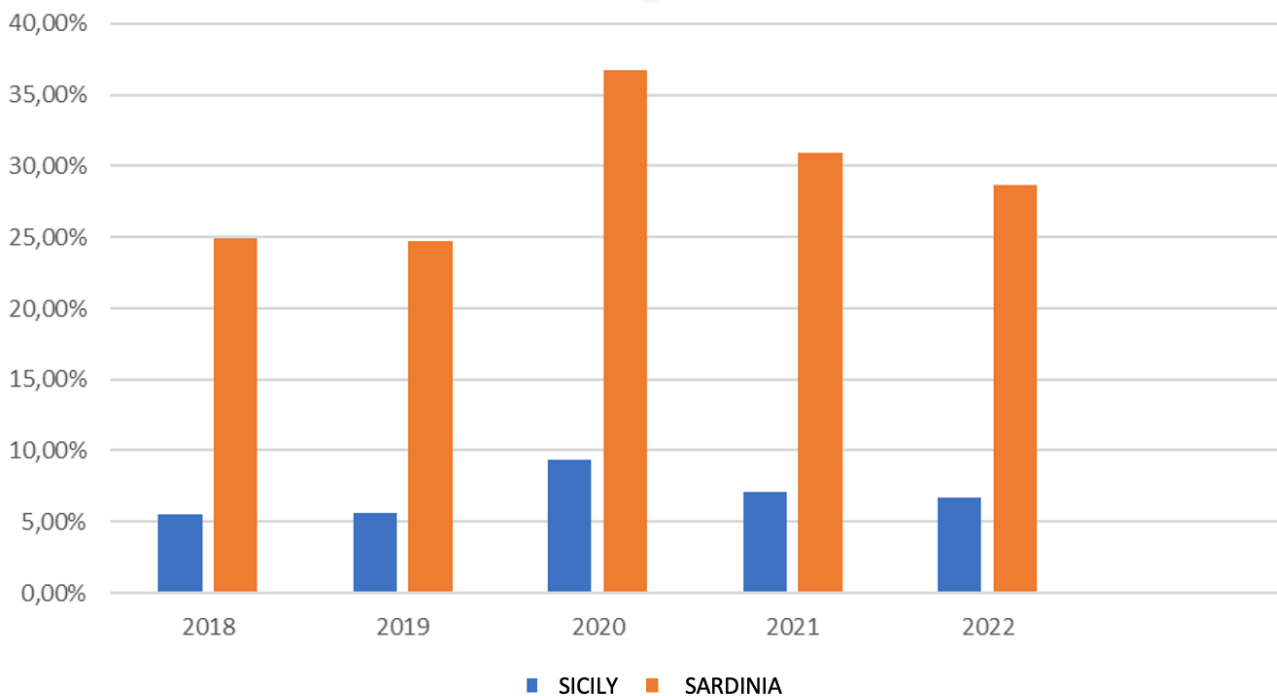


Source: Istat, latest data available

With regards Abruzzo, Molise, Campania and Basilicata, the percentage incidence of campsites and tourist villages compared to hotel establishments showed an increase during the COVID-19 pandemic, recording values of 40.94 respectively in 2021 %, 38.79%, 14.76% and 10.98%. However, once the health emergency was overcome, there was a return to pre-pandemic values, with percentages of 31.81%, 27.01%, 9.39% and 10.20% respectively. The regions of Apulia and Calabria, among those in the South, which boast a greater presence of tourist villages, follow a trend in line with the general Italian one. After the end of the COVID-19 pandemic, the percentage incidence of campsites and tourist villages compared to hotel establishments decreased compared to the pandemic period, recording percentages of 35.89% and 19.38%, but still remains higher than in the pre-pandemic period, with values of 34.38% and 17.23% respectively.

At island level the situation looks like this:

**Figure 7.** Incidence of nights spent in campsites/tourist villages on hotel establishments in the Insular Italy section %, 2018-2022



Source: Istat, latest data available

The scenario is similar for both regions and perfectly in line with the national trend: both Sicily and Sardinia, in fact, have a higher percentage incidence of campsites and tourist villages on hotel establishments in the post-COVID-19 phase (6.73% and 28.63%) compared to the pre-pandemic phase (5.48% and 24.88%), although lower than in the COVID emergency years (7.08% and 30.92%).

## 5. Discussion, conclusions and future implications

The conclusions that can be drawn from the analysis of the historical series "Customer movements in accommodation establishments" are the following: in the two pre-pandemic years, the results of arrivals and nights spent at hotel and in campsites/tourist villages remained stable, around 24%.

Obviously as predicted the pandemic led to severe arrivals and nights spent in both types of accommodation facilities. The decrease was much more significant in percentage terms in hotels, so much so that the ratio between hotels and campsites/tourist villages in 2020 rose to 30%, compared to 23.79% (and similar values) in pre-COVID years.

More surprising is the fact that in 2021 tourist activity seems to shift, in percentage terms, more towards campsites and tourist villages, with a further increase to 32.22%.

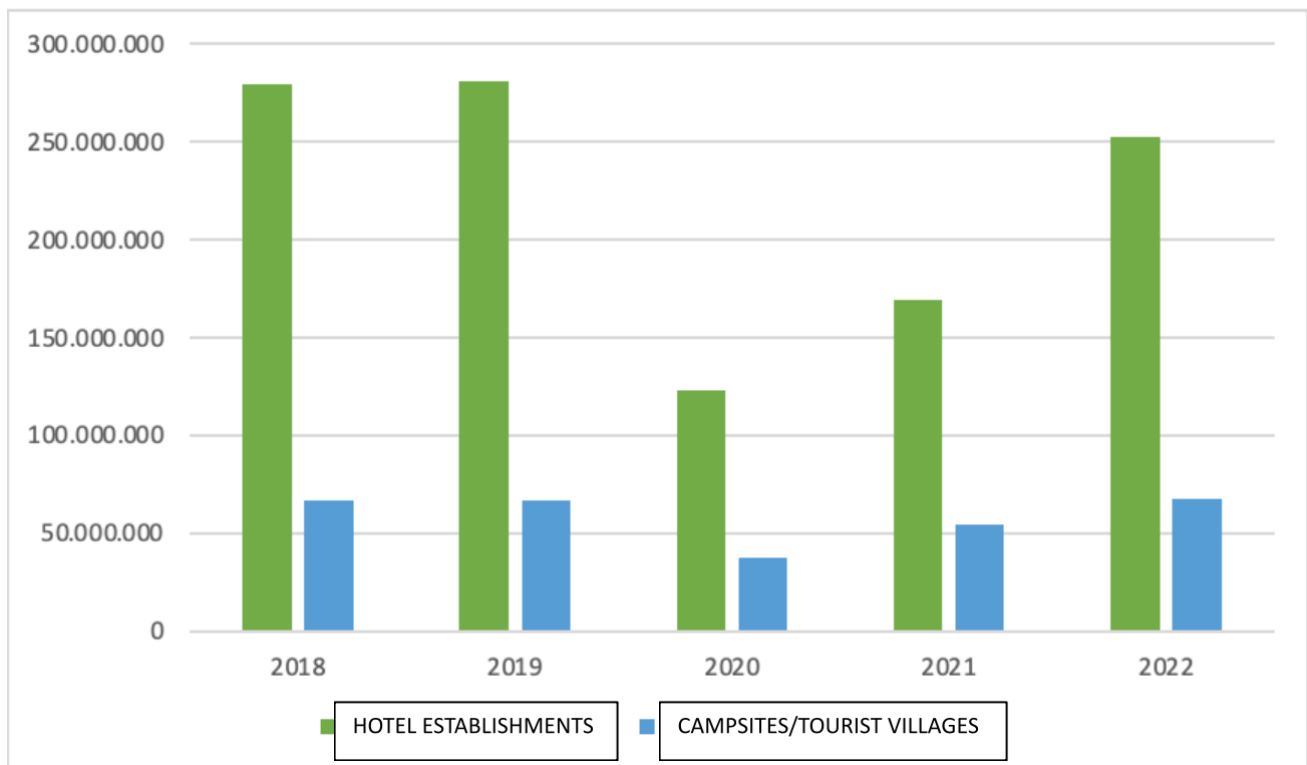
In numerical terms, this corresponds to a loss, compared to pre-pandemic years, of around 20% in the latter facilities, compared to over 40% in hotels. Although there are signs of recovery, hotels still seem to be suffering terribly post-COVID both in terms of attendance and arrivals.

In 2022, the scenario ahead is interesting. One might have expected a convergence towards the trend of the situation before COVID-19. In reality, only the data relating to camping and tourist villages behave in this way. The incidence on hotel establishments is around 26%, while for the latter there has not yet been a return to the pre-pandemic number of nights spent, presences in tourist villages and campsites are within the pre-pandemic standards, although they are slightly higher compared to the years examined before 2019.

Due to the fact the data relating to 2023 are not yet available, it can be concluded that the COVID-

19 pandemic has undoubtedly changed consumer preferences regarding choices of accommodation types. In the years of acute development of the pandemic (2019-2020), consumers preferred non-hotel types, considering them safer. Subsequently, with a partial return to normality, in 2022 campsites and tourist villages maintain, in most cases, a higher share of customers compared to the pre-COVID-19 period, while hotel facilities have not yet returned to the standards relating to the same period, as can be seen from the graph below.

**Figure 8.** Comparison of hotel and campsites/tourist villages nights spent, 2018-2022



Source: Istat, latest data available

## Acknowledgments

Nothing to declare.

## Conflict of interest

The author declares no conflicts of interest in this paper.

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