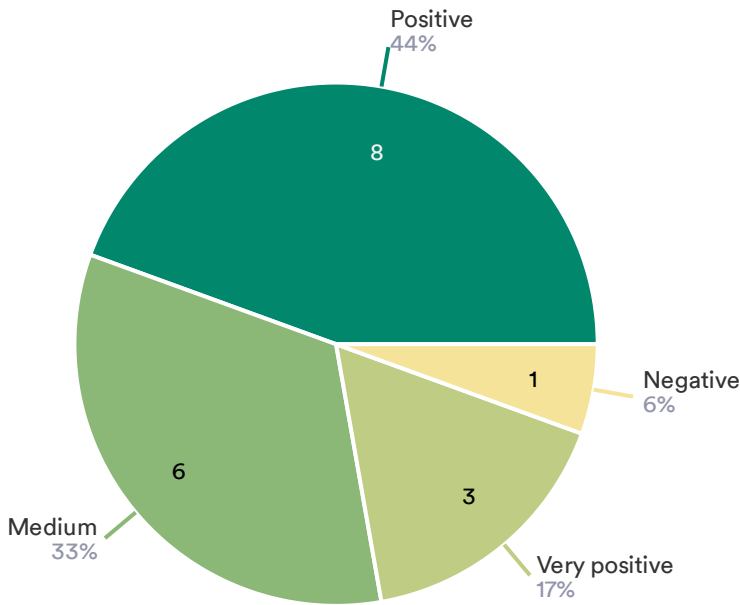


Sentiment Survey - Summer 2025

Sentiment Survey - Summer 2025

Q1. Overall, the summer season in your country was:

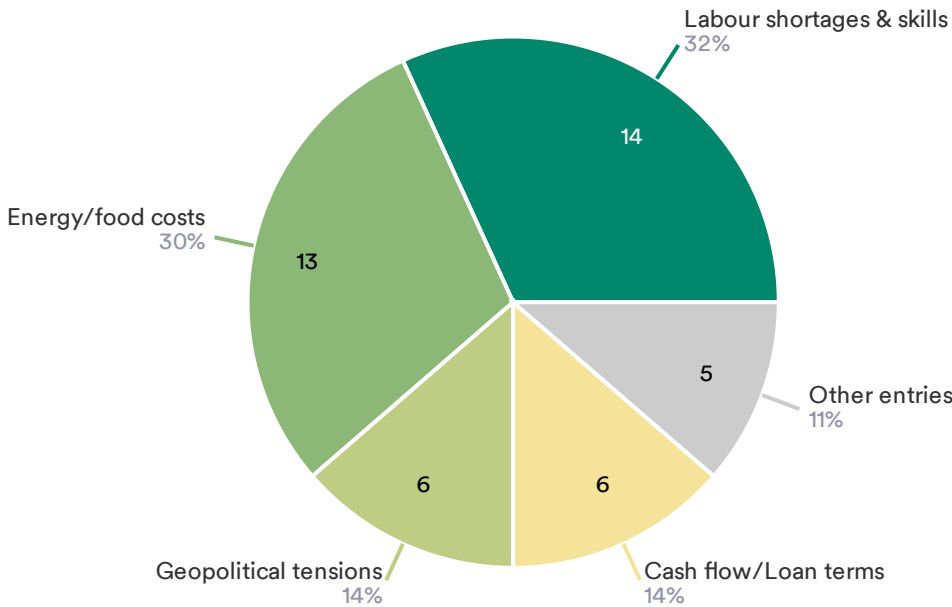
18 Responses



Positive Medium Very positive Negative

Q2. What were the top 3 challenges faced by the industry this summer?

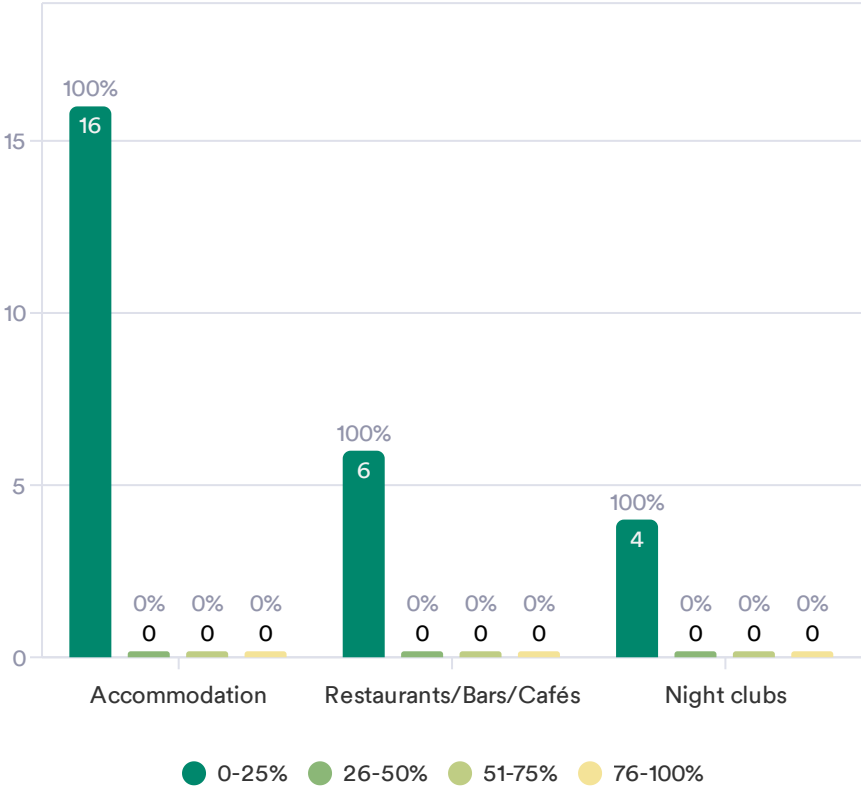
44 Responses



Sentiment Survey - Summer 2025

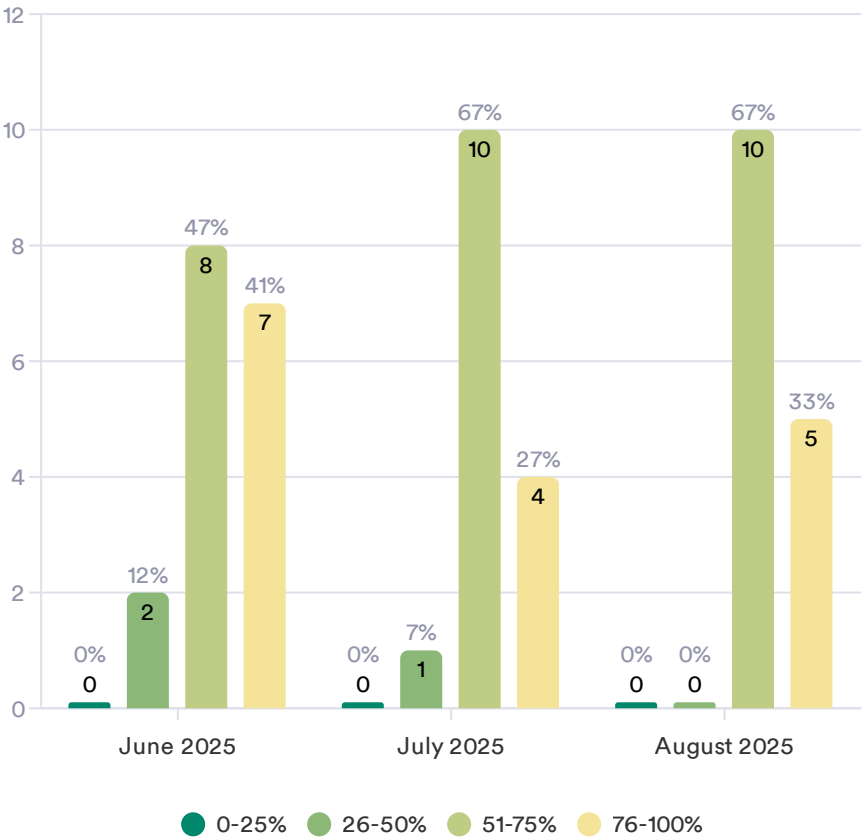
Q3.1. Indicate the average increase of travellers compared to summer 2024

16 Responses- 2 Empty



Q4. Indicate the occupancy rate

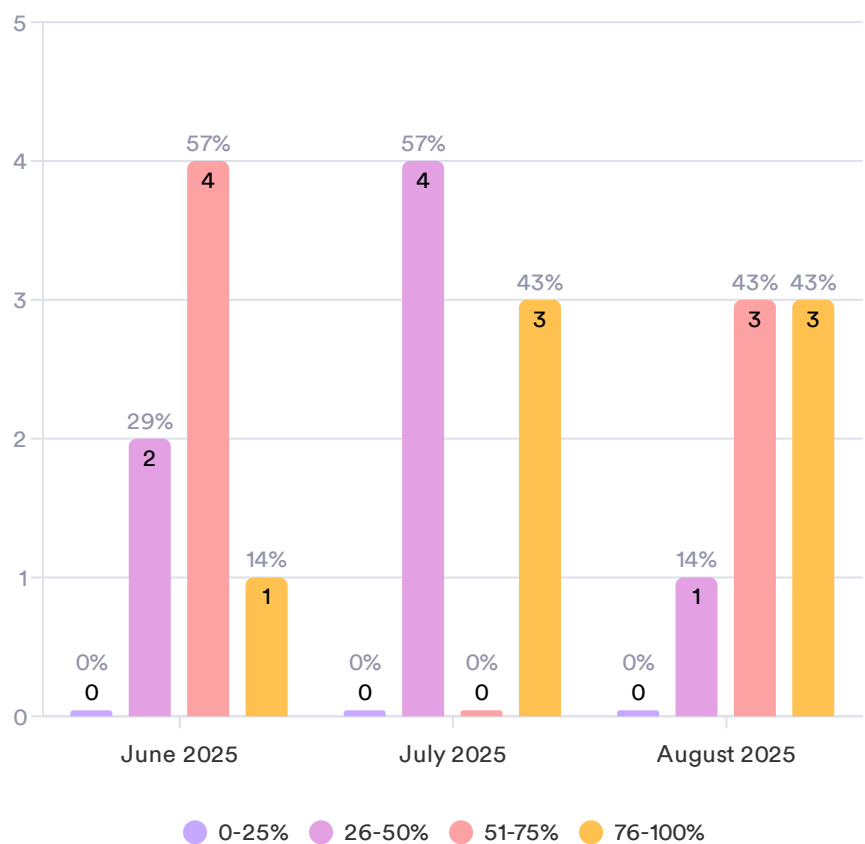
17 Responses- 1 Empty



Sentiment Survey - Summer 2025

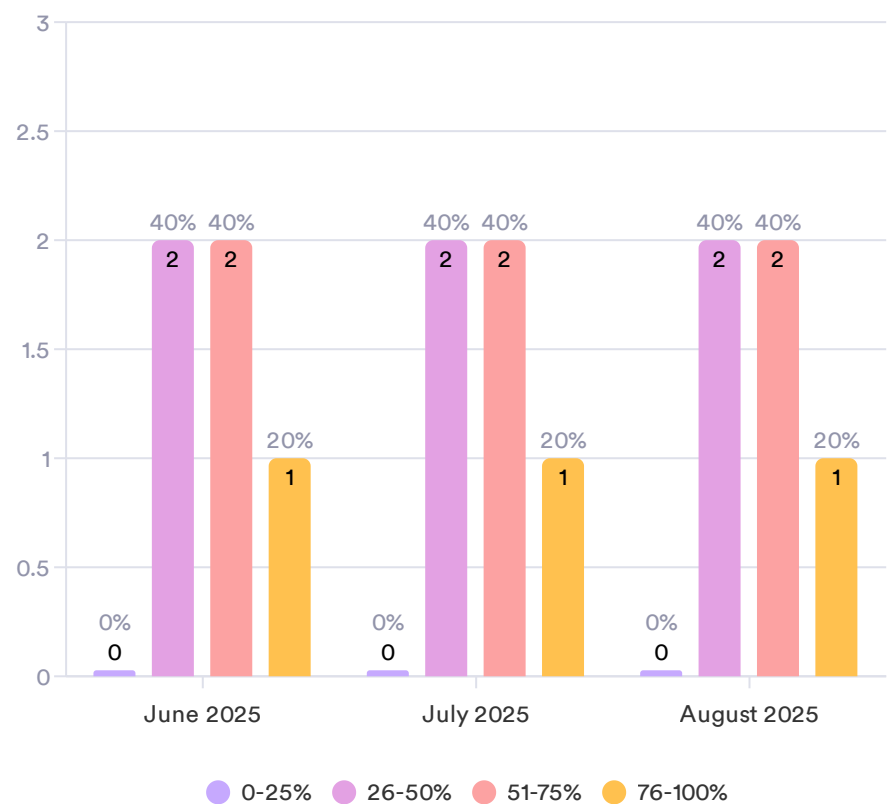
Q5.1. Indicate the occupancy rate for restaurants, bars and cafés.

7 Responses- 11 Empty



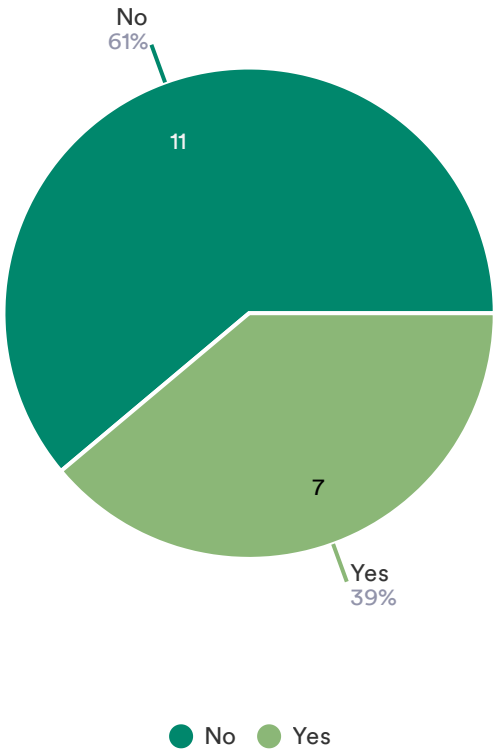
Q5.2. Indicate the occupancy rate for late-night entertainment establishments.

5 Responses- 13 Empty

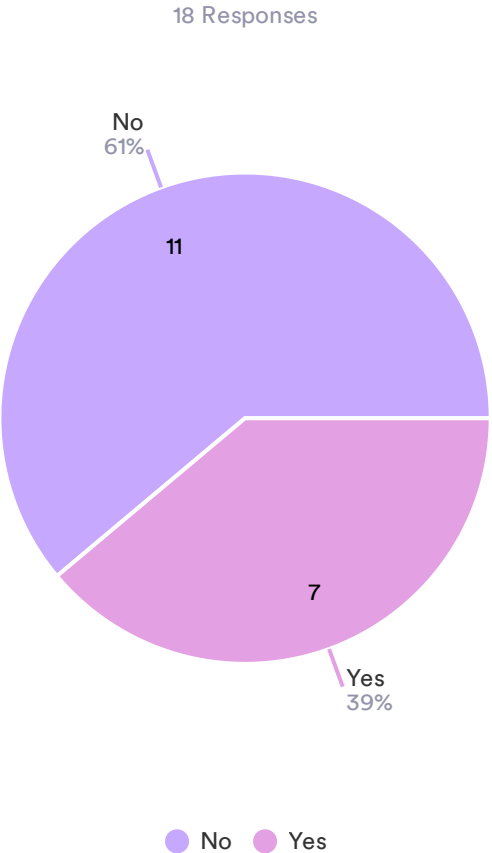


Q6. Did your country experience extreme weather conditions or natural disasters (e.g. fires, floods, high temperatures, etc.)?

18 Responses



Q7. Have you experienced any disturbances in areas receiving high numbers of travellers?

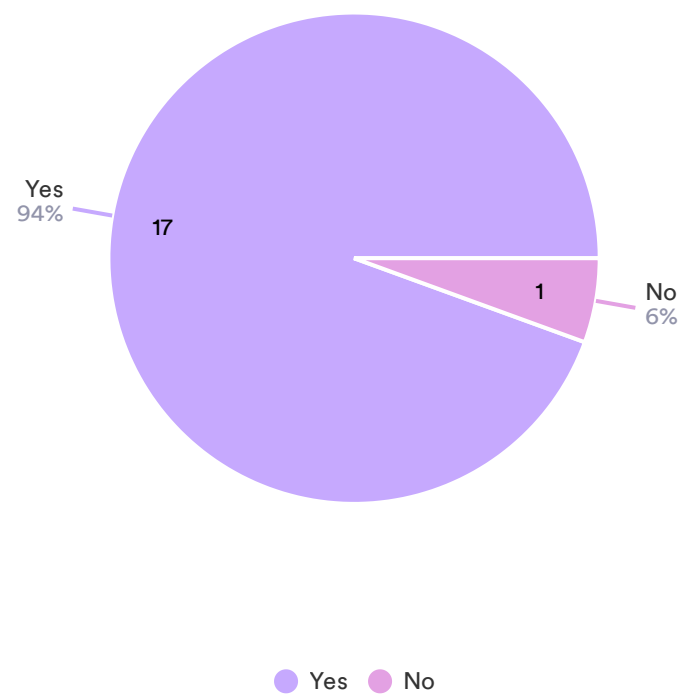


Q7.1. If you replied 'Yes', did your government take any action? What is your position on the matter and what measures should be in place?

Data
Sweden: Yes in the sence that each summer a debate on over tourism comes up in Sweden although we have very little, if none, issues with this matter. Just before the summer Visita has published a report showing that tourism generates significantly more in tax revenue at both the national and municipal levels than it costs. Introducing a tourist tax or fee would therefore have negative effects on municipal finances, resulting in reduced tourism and lower local consumption. The report can be found in Swedish on this webpage: https://visita.se/turistskatt/
Greece: Government action has been so far limited. Our position is that authorities should introduce clear carrying-capacity limits, invest in critical infrastructure (water, wate management etc) and ensure conditions of fair competition in the accommodation market.
Malta: Main concerns were related to disturbance in STR located in main residential areas. We also had various cases reported about anti-social behaviour. Government has promised to implement measures on STR and is introducing measures for increased community policing and measures concerning excessive consumption of alcohol and use of illegal substances.
There is always an ongoing discussion if the numbers of travellers is already viewed as "overtourism" or not. The view from HotellerieSuisse and other swiss tourism organisations is that we do not have overtourism in switzerland but partly in specific points a high number of tourists. With the right measures from the tourism organisations we can guide the tourists in the right areas at the right time.
Spain: The problem is the illegal offer in some areas. Very slowly action by local authorities.
No measures have been taken by the government to date. However, we observe a significant regional disparity: major cities are experiencing a decline in visitor numbers, while coastal areas, mountain resorts, and some secondary regions are seeing a notable increase in visitors.

Q8. Have price increases (e.g. food, energy, equipment, etc.) impacted profit margins?

18 Responses

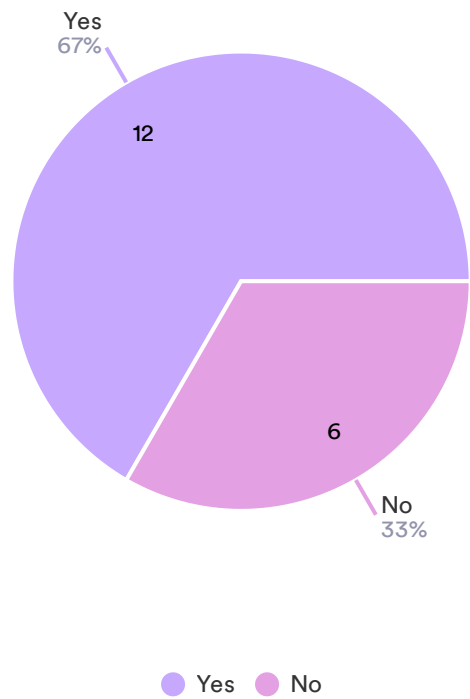


Q8.1. If you replied 'Yes', please specify.

Data
Greece: Operating costs rose this summer, particularly due to high energy prices and supply chain challenges.
Malta: Although the inflation rates have slowed down from what we experiences last year, food prices have continued to rise. This has caused restaurants and cafes to rise prices again, and we are seeing a differentiated and more cautious tourists spending pattern.
Romania: The impact is still under analysis but there are voices stating that there shall be a decrease of 10-15%.
Luxembourg: The benefit margin are very sensitive since the government is forcing salary increases every year, called the INDEX. In addition comes extra primes that workers get to make them stay in the company as we have shortage of qualified and motivated labour .
Ireland: food cost inflation cannot be passed on in full to consumers through higher prices.
Sweden: Profitability has been under pressure for some time from both the cost and revenue sides. This is challenging for a low-margin industry that generally has a low profitability of around 2-3%. A toxic cocktail of cost increases has been squeezing the Swedish hospitality sector for some time now.
Slovenia: Profit margins don't increase although revenue is much higher.
Austria: Although revenues are increasing, gross operating profits (GOPs) are declining due to higher costs for food, energy, labor and rent.
Yes. The increase in prices triggers several chain effects: The rise in costs leads to a decline in visitor numbers, as consumers become more price-sensitive. This results in an increase in the break-even point for businesses, which must generate more revenue to cover their costs. Profit margins are weakened, particularly due to the combined effects of inflation and rising energy prices. In this context, many businesses face financial pressure, highlighting the need for appropriate measures to support their profitability and sustainability.

Q9. Have labour shortages influenced business operations this summer? (e.g. service quality, staff workload, operating hours, etc.)

18 Responses

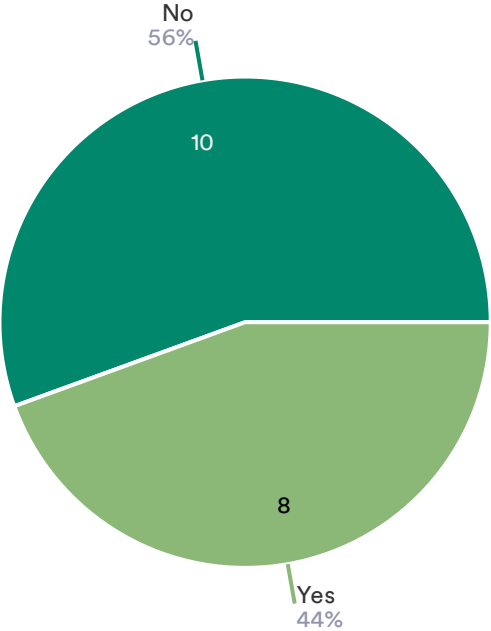


Q9.1. If you replied 'Yes', please specify.

Data
Romania: The length of obtaining the necessary authorization for non-EU personnel has increased up to 8 months making impossible for employers to have access to them, in spite of the Federations' multiple calls to reduce bureaucracy. There is a shortage of specialists (especially in health and spa tourism) and a high fluctuation to entry level positions.
Austria: Labour staff shortage generally remains a problem (fewer opening days,...)
Sweden: There has consistently been a shortage of staff, which impacts both the workload and the quality of work. It also affects the ability to develop the business as desired. While it is difficult to determine if this issue intensifies during the summer months, it remains a persistent challenge. Naturally, seasonal businesses face additional difficulties, as they must recruit new employees each summer.
Greece: Labour shortages have a clear impact on hotel operations and the quality of services . Many enterprises struggled to recruit qualified staff, others decided not to fully operate all the departments of the hotel.
Italy: Even if the problem of labour shortages is not solved, it has had no consequences on business operations due to the demand trend
Malta: Labour shortage remains a key challenge for the industry. It is even more challenging for the restaurants sector and smaller businesses. Our industry has become highly dependent on the employment of third country nationals, and therefore this involves consistent training, and the shortage of skills.
France: lack of staff means bad services and unsatisfaction for customer and at the end less turn over and a bad reputation.
Ireland: reduced service, reduced operating hours, application of AI.
Spain: in some cases, shortage of opening hours or problems with workers

Q10. Have you noted any issues with online platforms (e.g. online travel agents, food delivery platforms)?

18 Responses



No Yes

Thank You!

Sentiment Survey - Summer 2025