

The logo for ENIT (Agenzia Nazionale del Turismo) features the letters 'ENIT' in a bold, blue, sans-serif font. To the right of 'ENIT', the words 'AGENZIA NAZIONALE DEL TURISMO' are stacked vertically in a smaller, blue, sans-serif font. Below the 'ENIT' text, the year '1919' is written in a small, blue, sans-serif font, followed by a small Italian flag icon.

**ENIT** AGENZIA  
NAZIONALE  
DEL TURISMO  
1919

# *THE AUSTRIAN TOURISM MARKET*

RIMINI, 12-14 October 2022

## International tourism worldwide (January – July 2022)

UNWTO data from July 2022 shows that arrivals in the first seven months of the year reached 57% of pre-pandemic levels.

Compared to the same period in 2021, between January and July 2022 arrivals of international tourists **almost tripled (+172%)**.





## Italy sees receipts soar

Italy had receipts of **€21.3 billion (+22.7% on 2020; -52.0% on 2019)**, with a market share that went from 3.6% in 2020 to 4.2%, taking the country to **fourth place in the global rankings for receipts from international tourism.**

**Spain's market share also increased** in 2021 (from 3.4% to 5.6%), while there were **decreases in those of the USA** (from 13.3% to 11.4%) **and Germany** (from 4.1% to 3.6%).

Destination/receipts in billions of Euro				% in local currencies, constant prices	
	2019	2020	2021*	Var. % 21/19	Var. % 21/20
World	1,325	479	521	-60.6	6.8
USA	177.7	63.5	59.4	-64.7	-3.1
France	56.7	28.5	34.5	-39.2	21.1
Spain	71.2	16.2	29.2	-59.0	80.2
<b>Italy</b>	<b>44.3</b>	<b>17.3</b>	<b>21.3</b>	<b>-51.9</b>	<b>22.7</b>
UK	47.1	16.6	19.2	-60.0	11.9
Germany	37.3	19.4	18.8	-49.6	-2.8
Turkey	26.6	8.9	17.6	-30.2	103.8
Mexico	22.0	9.6	16.7	-19.4	80.0
Australia	40.8	22.6	14.4	-65.6	-39.6
Macau (China)	35.8	8.0	13.0	-61.8	68.7

Top 10 countries for receipts from international tourism in descending order, at current prices and exchange rates in 2021. Data about the number of foreign tourists in France and the UK in 2021 is not available yet

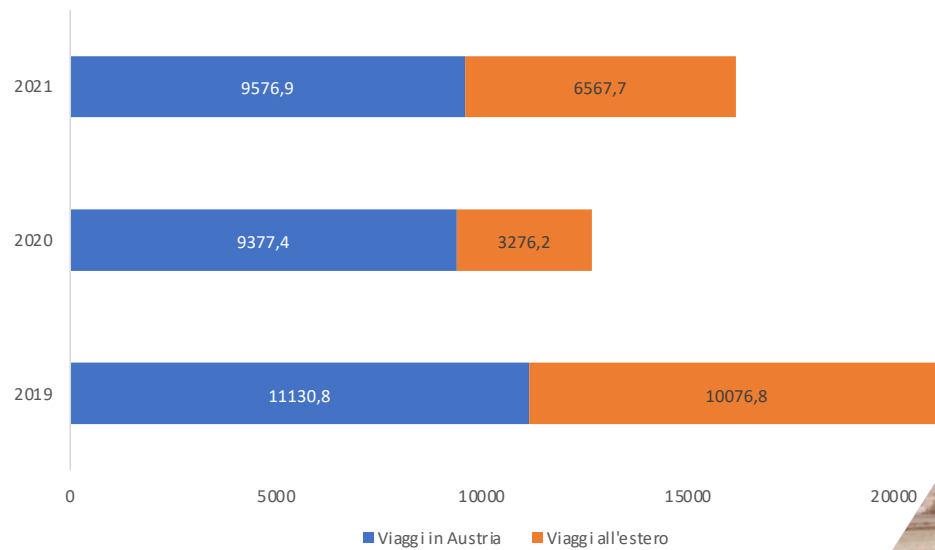
Source: ENIT Research Department using UNWTO data

RATING PAESI DI ORIGINE PER PRESENZE 2019 IN ITALIA		RATING PAESI DI ORIGINE PER PRESENZE 2020 IN ITALIA		RATING PAESI DI ORIGINE PER PRESENZE 2021 IN ITALIA	
	Italia		Italia		Italia
1	Germania	1	Germania	1	Germania
2	Stati Uniti	2	Paesi Bassi	2	Switzerland and Liechtenstein
3	Francia	3	Francia	3	Paesi Bassi
4	Regno unito	4	Austria	4	Austria
5	Paesi Bassi	5	Regno unito	5	Francia
6	Austria	6	Polonia	6	Stati Uniti
7	Polonia	7	Belgio	7	Belgio
8	Russia	8	Stati Uniti	8	Polonia
9	Spagna	9	Romania	9	Spagna
10	Cina	10	Ceca, Repubblica	10	Romania

## The new map of the markets

In the new map of tourism markets, there have been temporary falls for countries that are traditionally at the higher end of the rankings such as the **USA (now 6th)**, the **UK (down to 13th)** and **Russia (down to 15th)**, while places like **Switzerland**, the **Netherlands and Austria** have climbed towards the top

## NUMBER OF TRIPS BY AUSTRIANS IN 2019-2021 (in thousands)

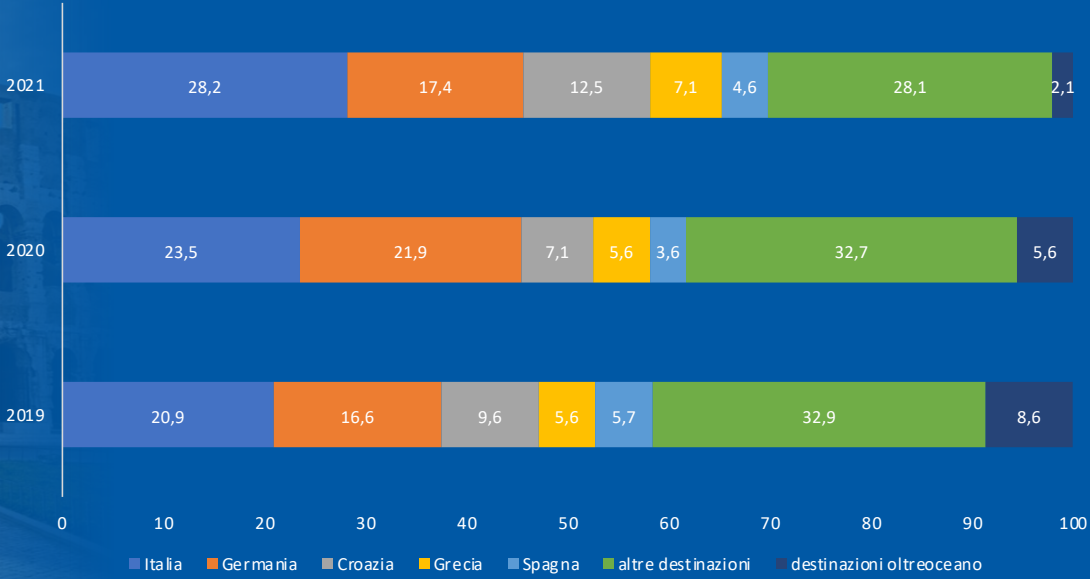


Source: Statistik Austria



**ENIT** 1919 **AGENZIA NAZIONALE DEL TURISMO**

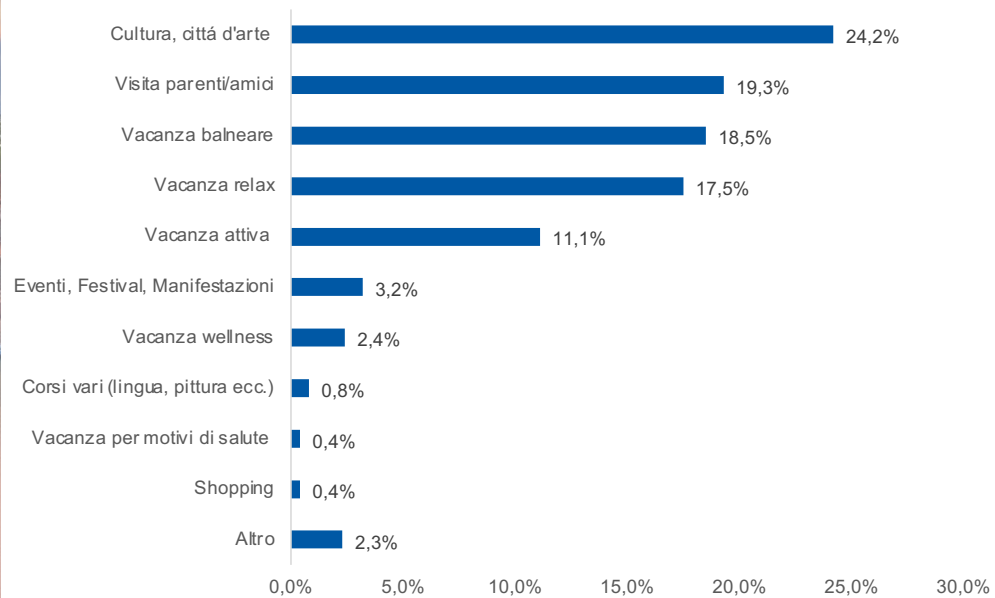
## WHERE AUSTRIANS TRAVELLED - COMPARISON OF 2019, 2020 AND 2021



Source: Statistik Austria

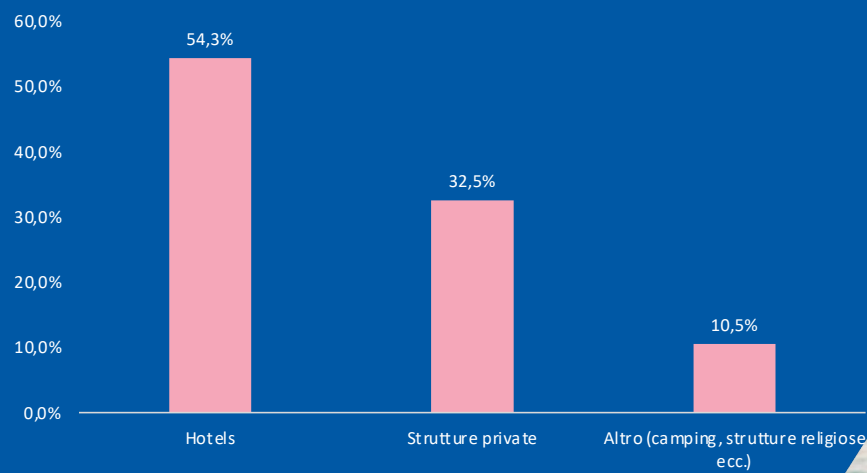


### TYPES OF TRIPS BY AUSTRIAN TOURISTS IN 2021



Source: Statistik Austria

### TYPES OF ACCOMMODATION CHOSEN BY AUSTRIAN TOURISTS IN 2021

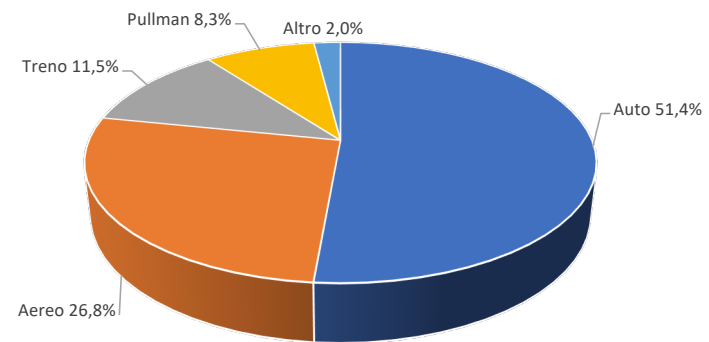


Source: Statistik Austria

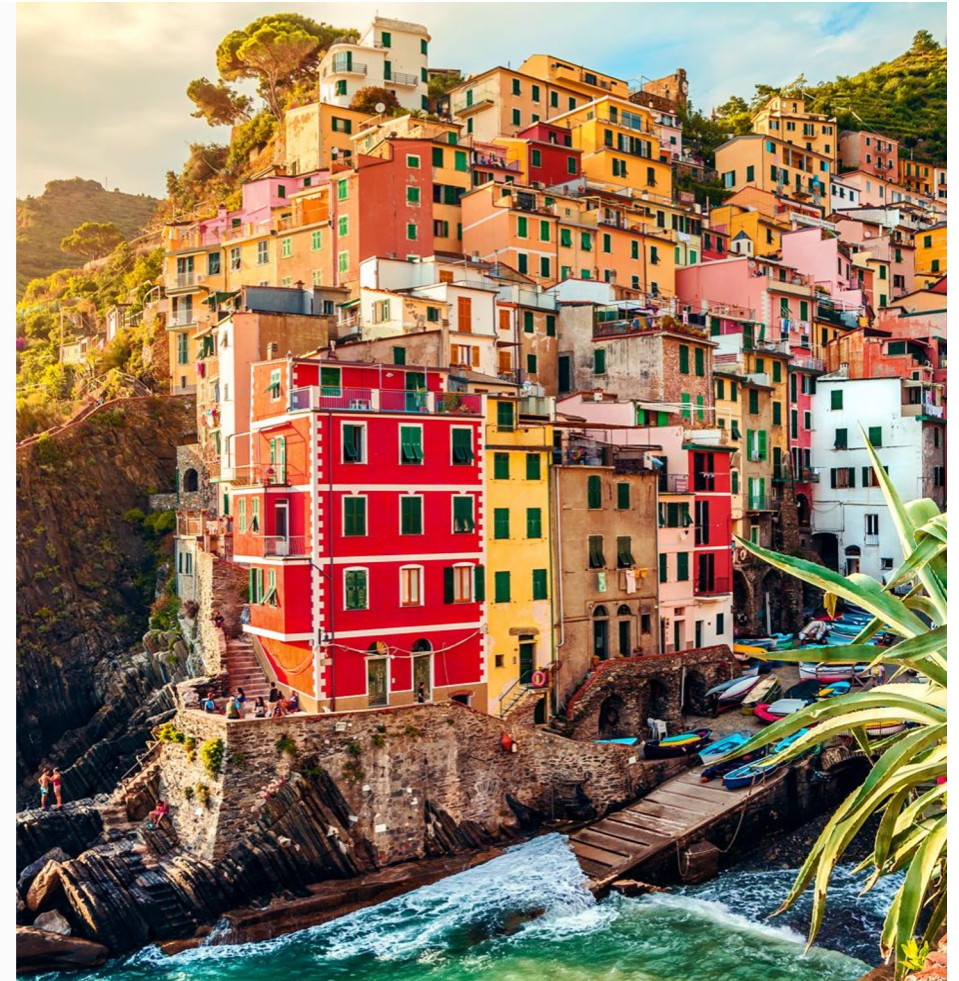


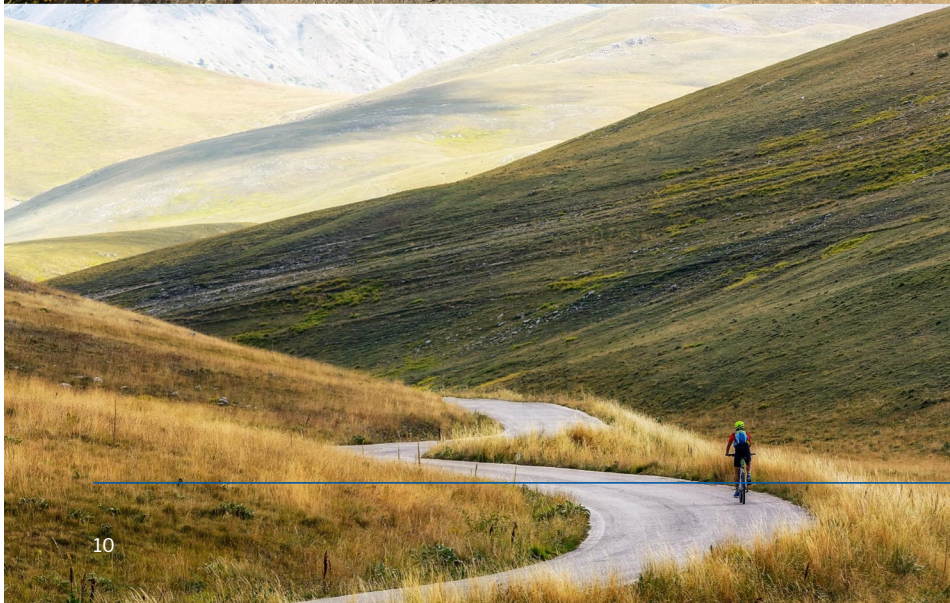


### MEANS OF TRANSPORT USED BY AUSTRIANS FOR FOREIGN HOLIDAYS IN 2021



Source: Statistik Austria





## FLIGHTS FROM AUSTRIA TO ITALY

**Austrian** 

**From Vienna**  
 Bologna (BLQ)  
 Milan (MXP)  
 Florence (FLR)  
 Venice (VCE)  
 Naples (NAP)  
 Rome (FCO)  
 Catania (CTA)

**Austrian**   
 myHoliday

**From Vienna**  
 Olbia (OLB)  
 Cagliari (CAG)  
 Brindisi (BDS)  
 Lamezia Terme (SUF)  
 Palermo (PMO)

 **RYANAIR**

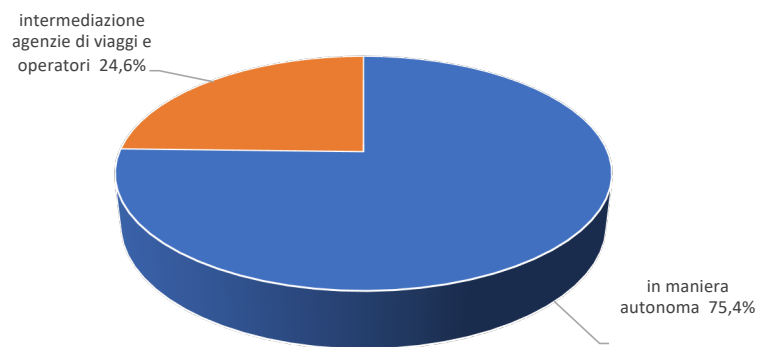
**From Vienna**  
 Alghero (AHO)  
 Bari (BRI)  
 Bergamo (BGY)  
 Bologna (BLQ)  
 Brindisi (BDS)  
 Cagliari (CAG)  
 Catania (CTA)  
 Genoa (GOA)

**From Vienna**  
 Milan (MXP)  
 Naples (NAP)  
 Palermo (PMO)  
 Perugia (PEG)  
 Pisa (PSA)  
 Rome (FCO)  
 Venice (VCE)

**WIZZ**

**From Vienna**  
 Bari (BRI)  
 Catania (CTA)  
 Naples (NAP)  
 Rome (CIA)  
 Rome (FCO)

## HOW AUSTRIANS BOOKED INTERNATIONAL TRAVEL IN 2021



Source: Statistik Austria



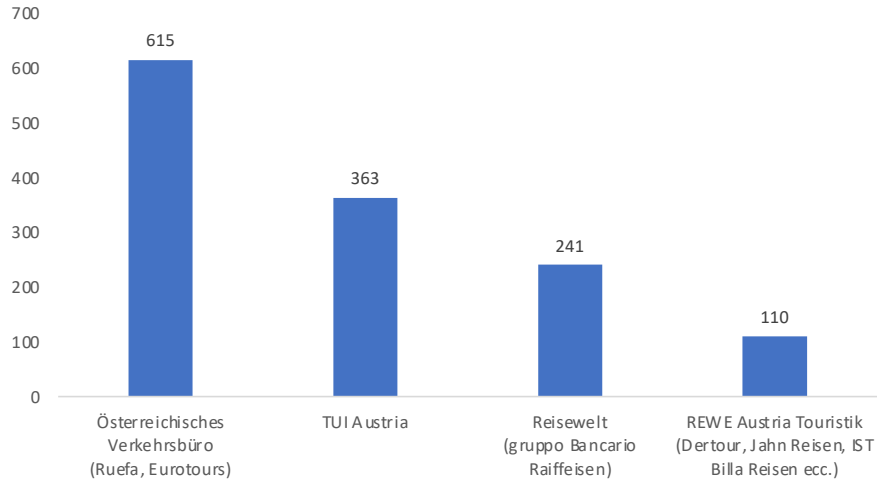
## THE ORGANIZED TOURISM SCENE IN AUSTRIA

770 tour operators  
2700 travel agencies  
Total turnover:  
€1.3 billion





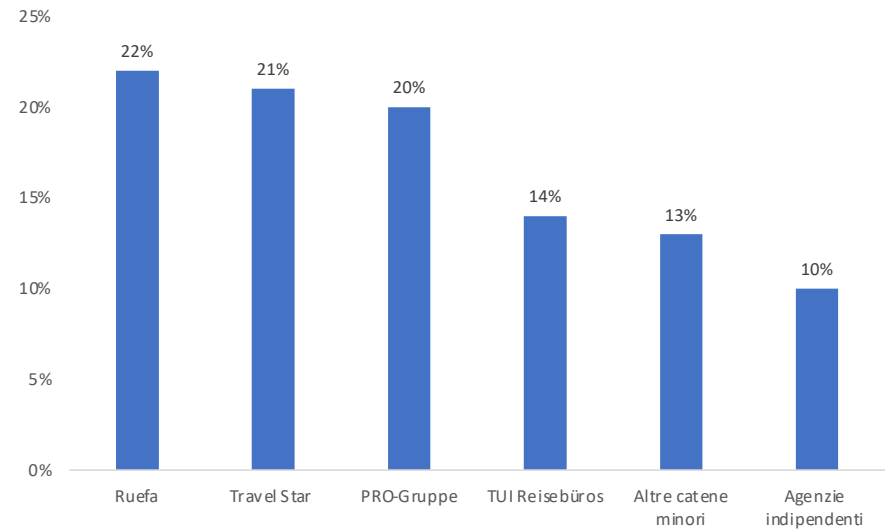
### BIGGEST AUSTRIAN TOUR OPERATORS IN TERMS OF TURNOVER (in millions of EURO)



Source: UniCredit Research 2019



## TRAVEL AGENCIES IN AUSTRIA



Source: Statistik Austria

## TRENDS IN 2023 - FORECASTS

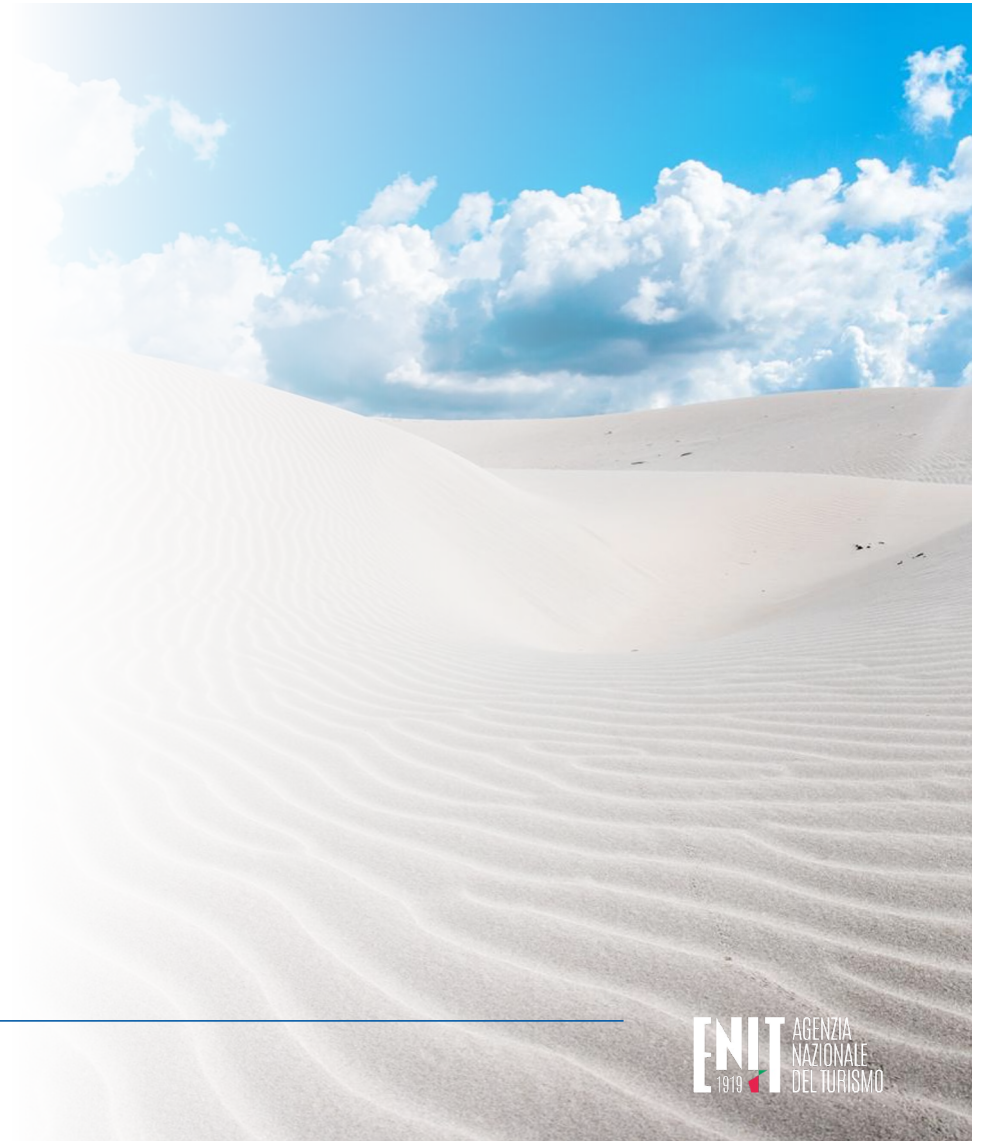
- War in Ukraine
- Inflation of around 10%
- Energy crisis (high electricity and gas prices)
- Higher petrol/kerosene prices
- Higher travel costs
- Coronavirus is an unknown factor



Fall in bookings for the 2022/23 winter season and the 2023 summer season

## TRENDS IN 2023

- ❖ Not booking holidays so far in advance as before the pandemic.
- ❖ A tendency to take shorter holidays
- ❖ A tendency to take more holidays
- ❖ Among pensioners: a tendency to take long holidays in hot places during the winter to avoid spending a lot on gas and electricity (there is already huge demand in Turkey and the Canary Islands).





# SEGMENTS AND PRODUCTS

A big focus on **sustainability**:

See <https://changemakerhotels.com/>

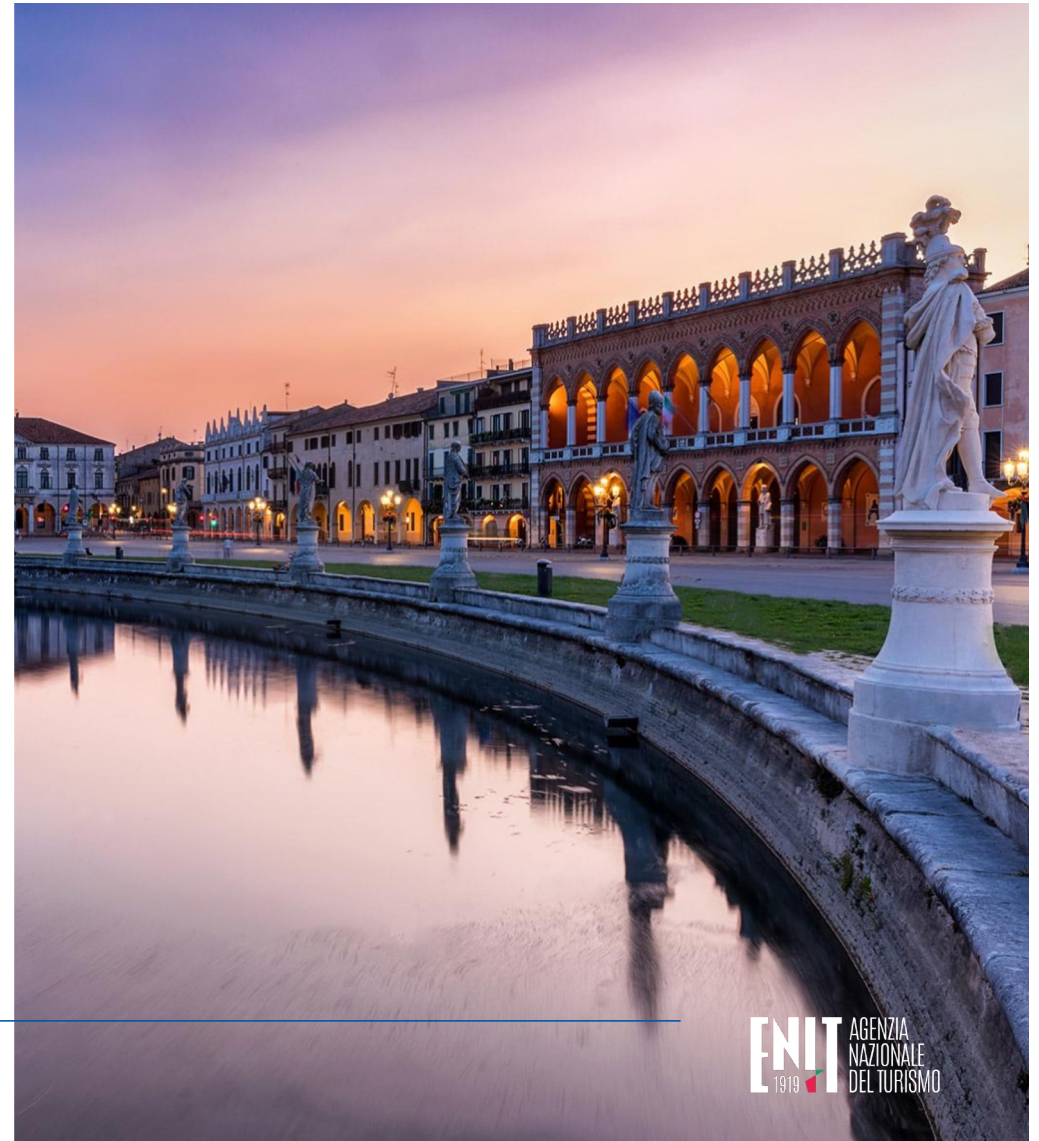
- Active holidays (cycling and hiking)
- Nature holidays

But also...

- Beach holidays
- Art and culture holidays

Combined with **experiential travel**, for example:

- ✓ A holiday in Piedmont with a tour of a winery.
- ✓ Watching an opera at La Scala during a holiday in Milan.
- ✓ Seeing a concert at the Circus Maximus during a holiday in Rome.
- ✓ Taking a glass-making course on Murano during a holiday in Venice.





THANK YOU

RIMINI, 12-14 October 2022