



TTG 2022 ENIT SEMINARS

Focus on Europe: France

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ENIT SERVICES FOR TOURISM BUSINESSES

Club Italia

Tourism businesses and ENIT promote Italy worldwide, with special deals

A newsletter promoting a stronger Italian tourism network

A way to keep up to date with promotion initiatives and activities, in Italy and across the globe

Statistical bulletins and infographics

Revealing the current trends in all markets and gauging the competitiveness of the industry

Scouting for opportunities to access funding

Find out about ways for tourism businesses to get credits

The Open Library

A database of free photographs of Italy for communication purposes

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%)**.



EUROPE: THE MAINSTAY OF INTERNATIONAL TOURISM

In 2021, Europe welcomed 288.4 million incoming tourists (38.7% of the amount recorded in 2019), which was the smallest drop among all of the continents compared to 2019 (-61.3%). It was also the biggest increase on 2020 (+21.1%) compared to the global total and the other destination areas:

- In Asia and the Pacific there were just over 20 million arrivals from other countries (-94.3% on 2019; -65.1% on 2020)
- In America there were 82.4 million (-62.4%; +18.1%)
- In Africa there were 19.4 million (-71.3%; +3.3%)
- In the Middle East there were 18.6 million (-74.5%; -6.2%)

In terms of receipts, the overall figure for Europe was €260.1 million, approximately half (49.9%) of the total takings from international tourism (€521 million). Nonetheless, it only amounted to 50.7% of the receipts in 2019.

Destination/arrivals in millions	2019	2020	2021	Var. % 21/19	Var. % 21/20
World	1,465	406	429	-70.7	+5.8
Europe	745.2	238.1	288.4	-61.3	+21.1
Asia and Pacific	359.6	59.2	20.6	-94.3	-65.1
America	219.3	69.8	82.4	-62.4	+18.1
Africa	68.1	18.8	19.4	-71.5	+3.3
Middle East	73	19.8	18.6	-74.5	-6.2

Destination/receipts in billions of Euro	2019	2020	2021*	% in local currencies, constant prices	
				Var. % 21/19	Var. % 21/20
World	1,325	579	521	-60.6	+6.8
Europe	513.0	208.1	260.1	-49.6	+21.6
Asia and Pacific	394.3	110.5	79.5	-79.7	-29.1
America	294.8	109.9	118.2	-59.9	+5.5
Africa	34.8	13.1	14.1	-60.0	+4.3
Middle East	88.2	37.8	49.6	-41.3	+34.0



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%).

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

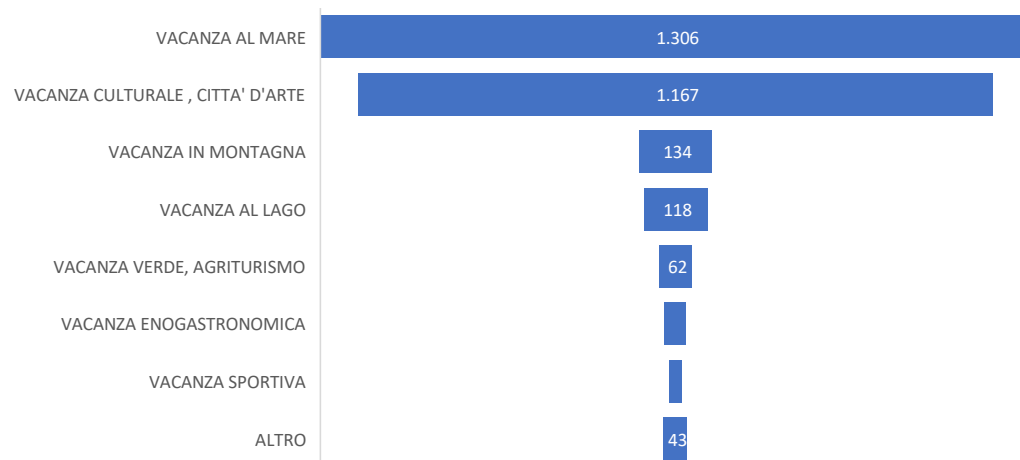
In the new map of tourism markets, there have been temporary falls for countries that are traditionally at the higher end of the rankings such as the **USA (now 6th)**, the **UK (down to 13th)** and **Russia (down to 15th)**, while places like **Switzerland**, the **Netherlands** and **Austria** have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

Source: ENIT Research Department using ISTAT data

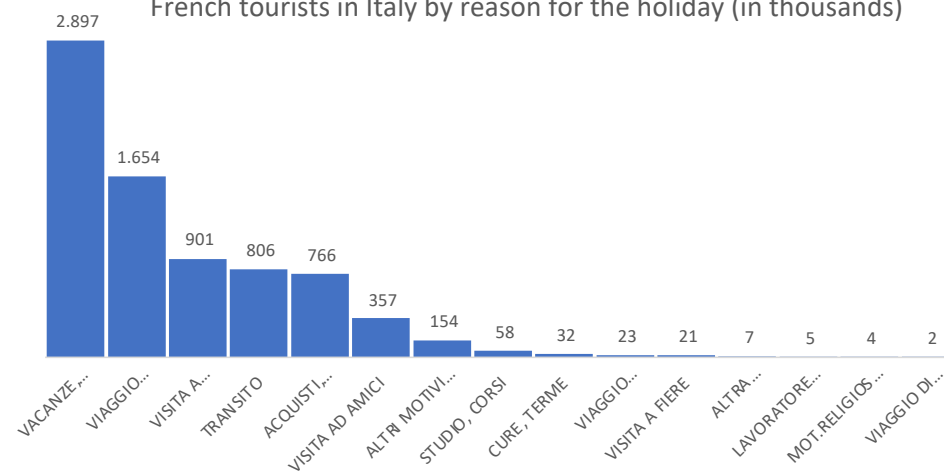
Reasons for French trips to Italy – in thousands of travellers



Viaggiatori francesi in Italia per tipo di vacanza (.000)



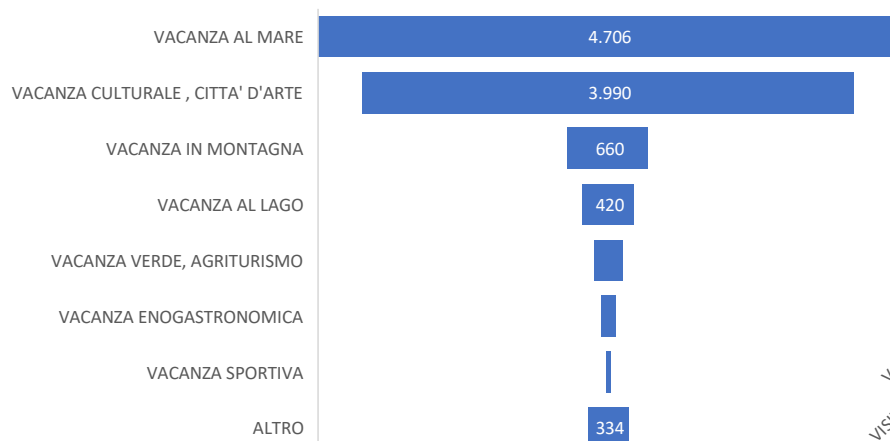
French tourists in Italy by reason for the holiday (in thousands)



Source: ENIT Research Department using Bank of Italy data

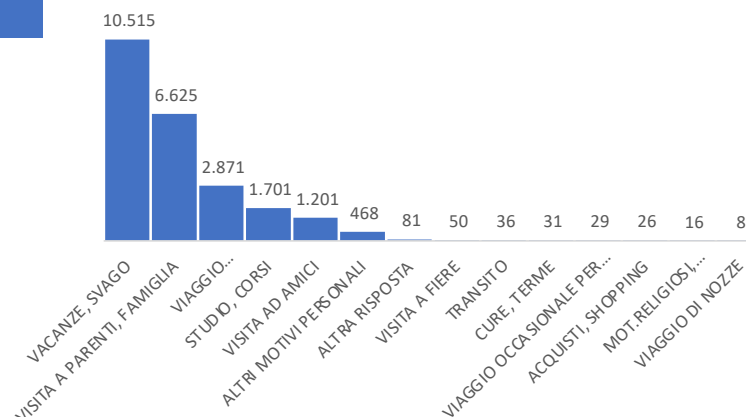


Pernottamenti dei visitatori francesi in Italia per tipo di vacanza
(.000)



Source: ENIT Research Department using Bank of Italy data

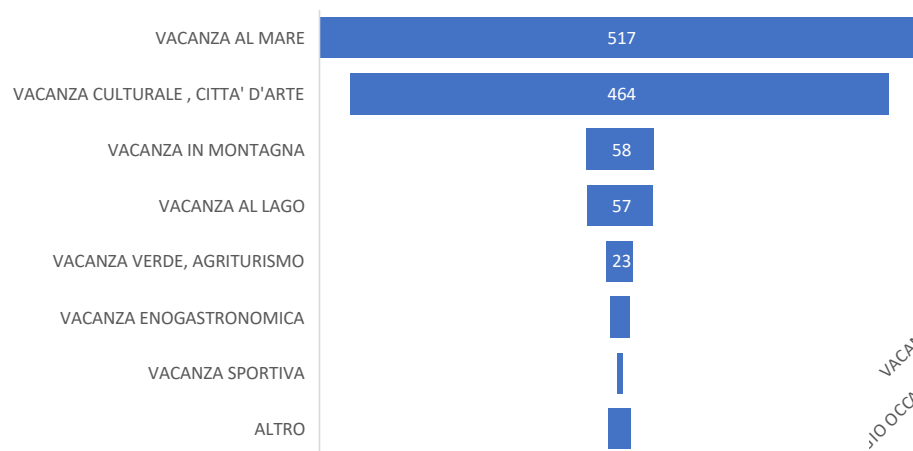
Overnight stays by French tourists in Italy by
reason for the holiday (in thousands)



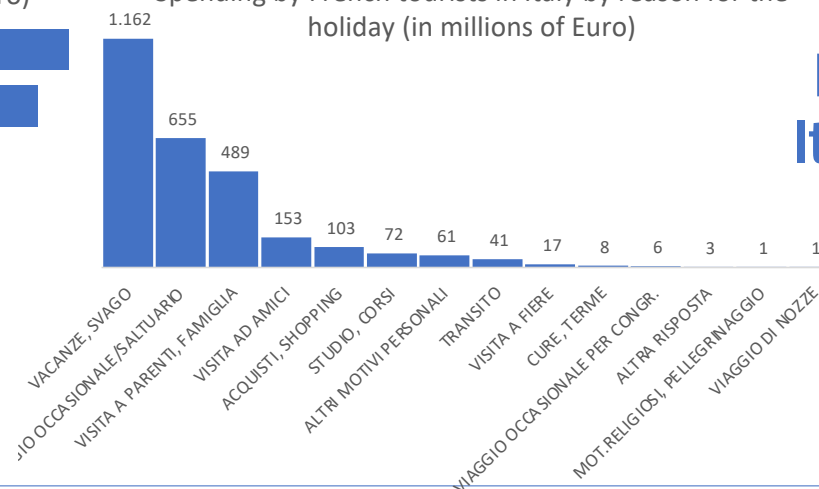
**Reasons for
French trips to
Italy – in
thousands of
overnight stays**



Spesa dei visitatori francesi in Italia per tipo di vacanza (MLN di Euro)



Spending by French tourists in Italy by reason for the holiday (in millions of Euro)

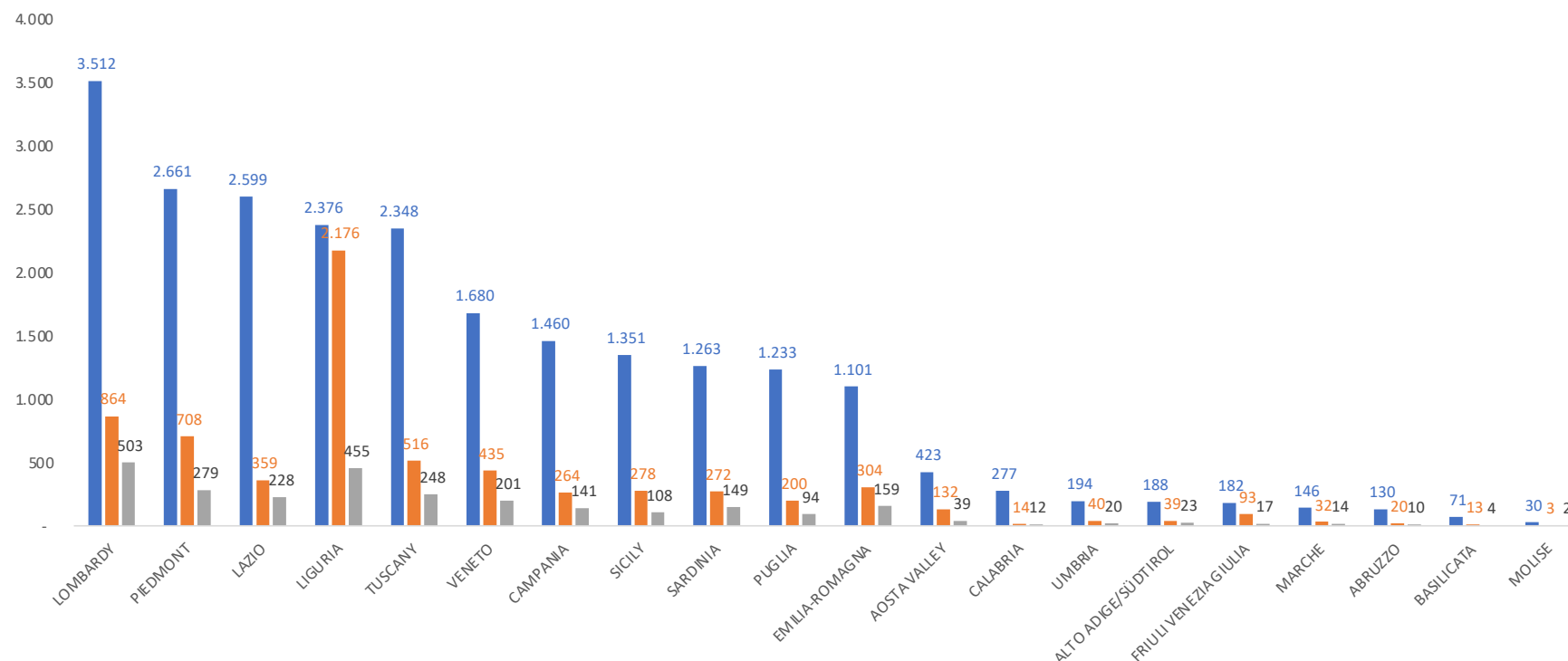


Reasons for French trips to Italy – spending in millions of Euro

Source: ENIT Research Department using Bank of Italy data

Overnight stays, travellers and spending by French tourists in Italy by region

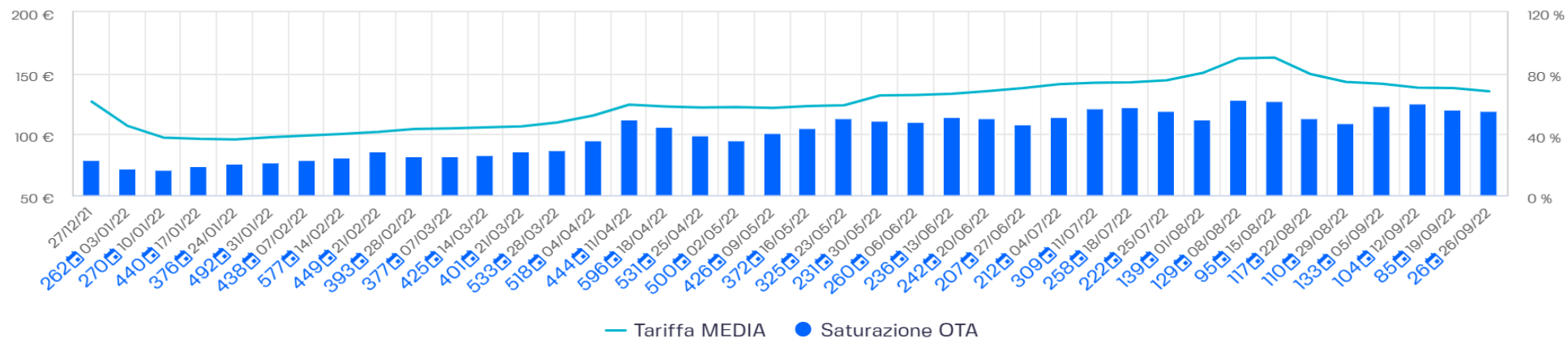
Overnight stays, travellers and spending by French tourists in Italy by region
(in thousands and in millions of Euro)



Source: ENIT Research Department using Bank of Italy data

■ OVERNIGHT STAYS (in thousands) ■ TRAVELLERS (in thousands) ■ SPENDING (millions of Euro)

Occupancy in accommodation facilities found in Online Travel Agencies, Jan-Sep 22



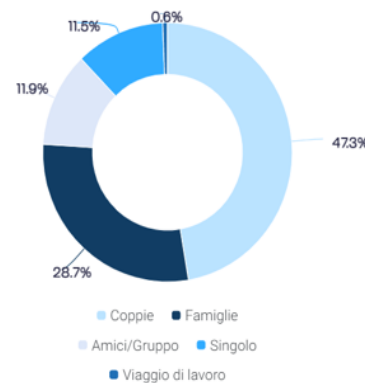
VISITATORI DOMESTICI VS. INTERNAZIONALI



MERCATI

	Contenuti ↓	Sentiment
Italia	45,6% ▼	83,0 _{/100} ▼
Germania	8,4% ▼	83,6 _{/100} ▼
Francia	6,5% ▲	83,2 _{/100} ▼
Regno Unito	4,0% ▲	84,8 _{/100} ▼
Spagna	3,2% ▲	81,3 _{/100} ▼

TIPOLOGIE DI VIAGGIO



	Contenuti	Sentiment
Coppie	47,3% ▼	84,2 _{/100} ▼
Famiglie	28,7% ▲	83,3 _{/100} ▼
Amici/Gruppo	11,9% ▲	82,9 _{/100} ▼
Singolo	11,5% ▼	82,1 _{/100} ▼
Viaggio di lavoro	0,6% ▼	79,7 _{/100} ▼

Source: ENIT Research Department using The Data Appeal
Company data

1st-3rd quarter 2022

International flight arrivals in Italy vs. 2021, vs. 2019

TRIP ORIGINS	Year 0	Year -1	VAR% Y0 vs Y-1	Volumes Y-1/Y-0	...
U.S.A./US	1 146 394	325 378	+252.3%	14.4%	20.9%
Germany/DE	776 529	485 711	+59.9%	21.6%	14.1%
United Kingdom/GB	547 437	138 211	+296.1%	6.1%	10.0%
France/FR	386 556	240 414	+60.8%	10.7%	7.0%
Spain/ES	222 870	98 058	+127.3%	4.4%	4.1%
Netherlands/NL	197 323	128 167	+54.0%	5.7%	3.6%
Russia/RU	30 961	36 116	-14.3%	1.6%	0.6%
China/CN	227	275	-17.5%	0.0%	0.0%
Others	2 186 541	800 366	+173.2%	35.5%	39.8%
Trip origins (selected)	5 494 838	2 252 696	+143.9%		
Total Trips	5 494 838	2 252 696	+143.9%		

TRIP ORIGINS	Year 0	Year -1	VAR% Y0 vs Y-1	Volumes Y-1/Y-0	...
U.S.A./US	1 123 733	1 573 601	-28.6%	15.4%	22.3%
Germany/DE	776 506	1 494 728	-48.1%	14.7%	15.4%
France/FR	386 515	525 709	-26.5%	5.2%	7.7%
Spain/ES	222 001	337 332	-34.2%	3.3%	4.4%
Netherlands/NL	197 301	266 390	-25.9%	2.6%	3.9%
United Kingdom/GB	163 042	323 507	-49.6%	3.2%	3.2%
Russia/RU	30 465	551 391	-94.5%	5.4%	0.6%
China/CN	222	434 931	-99.9%	4.3%	0.0%
Others	2 131 553	4 679 061	-54.4%	45.9%	42.4%
Trip origins (selected)	5 031 338	10 186 650	-50.6%		
Total Trips	5 031 338	10 186 650	-50.6%		

Source: ENIT Research Department using Forward Data

4th quarter 2022

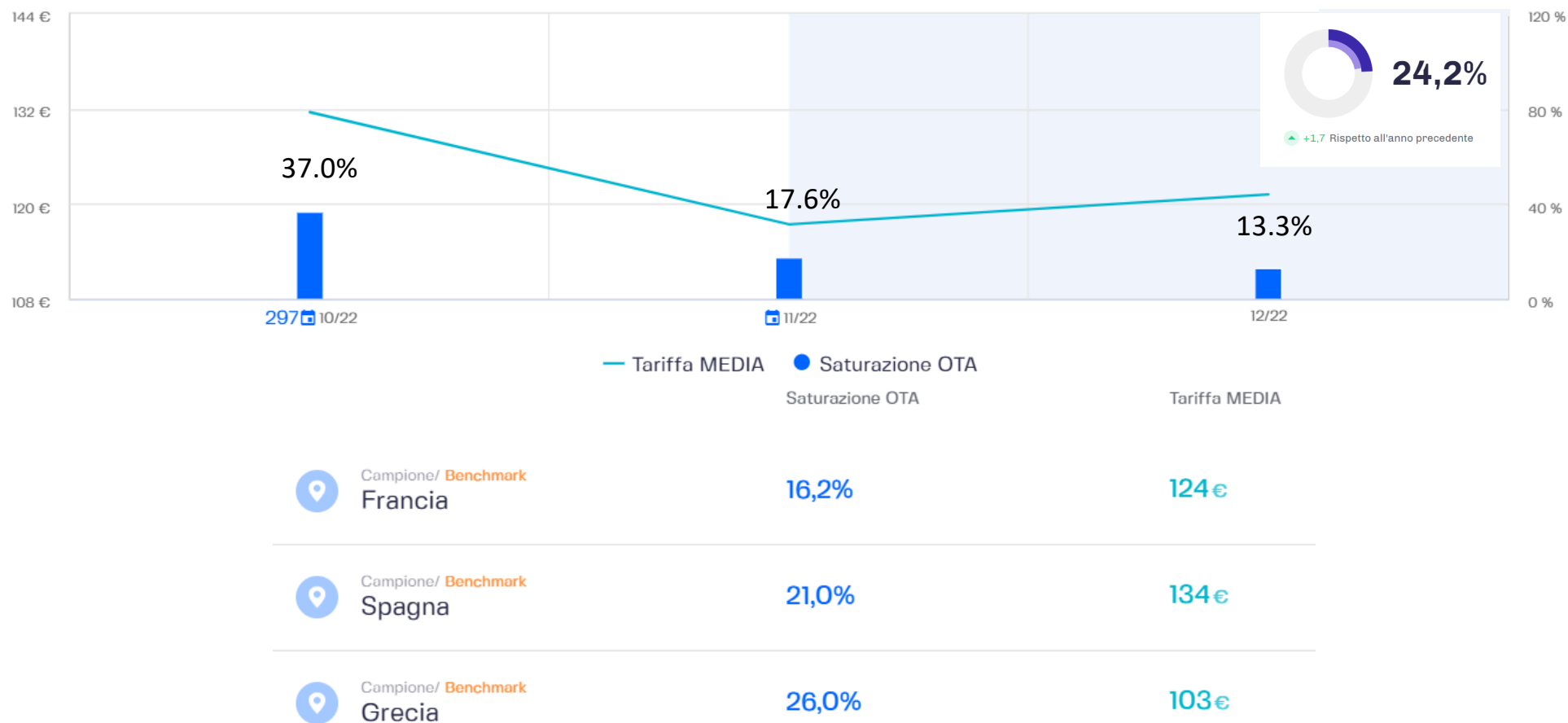
International flight bookings for Italy vs. 2021, vs. 2019

TRIP ORIGINS	Year 0	Year -1	VAR% Y0 vs Y-1	Volumes Y-1/Y-0	...
U.S.A./US	246 665	111 239	+121.7%	21.7%	25.0%
Germany/DE	121 726	100 878	+20.7%	19.7%	12.3%
United Kingdom/GB	83 443	42 105	+98.2%	8.2%	8.5%
France/FR	44 550	41 578	+7.1%	8.1%	4.5%
Spain/ES	37 983	21 814	+74.1%	4.3%	3.8%
Netherlands/NL	24 854	22 691	+9.5%	4.4%	2.5%
Russia/RU	1 902	4 222	-55.0%	0.8%	0.2%
China/CN	261	60	+335.0%	0.0%	0.0%
Others	425 585	168 002	+153.3%	32.8%	43.1%
Trip origins (selected)	986 969	512 589	+92.5%		
Total Trips	986 969	512 589	+92.5%		

TRIP ORIGINS	Year 0	Year -1	VAR% Y0 vs Y-1	Volumes Y-1/Y-0	...
U.S.A./US	246 467	281 241	-12.4%	21.1%	25.1%
Germany/DE	121 726	159 664	-23.8%	12.0%	12.4%
United Kingdom/GB	83 382	95 094	-12.3%	7.1%	8.5%
France/FR	44 547	57 333	-22.3%	4.3%	4.5%
Spain/ES	37 974	39 488	-3.8%	3.0%	3.9%
Netherlands/NL	24 852	32 551	-23.7%	2.4%	2.5%
Russia/RU	1 675	62 151	-97.3%	4.7%	0.2%
China/CN	261	26 060	-99.0%	2.0%	0.0%
Others	420 816	580 093	-27.5%	43.5%	42.9%
Trip origins (selected)	981 700	1 333 675	-26.4%		
Total Trips	981 700	1 333 675	-26.4%		

Source: ENIT Research Department using Forward Data

Bookings in accommodation facilities found in Online Travel Agencies, Oct-Dec 22



Source: ENIT Research Department using The Data Appeal Company data