ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

TTG 2022
ENIT SEMINARS

Focus on Europe: Germany

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AGENZIA NAZIONALE DEL TURISMO

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%).**

International arrivals in 2022 compared with 2019 (%)

Country	Jan	Feb	Mar	Apr	May	Jun	Jul	YTD
United States	-57	-55	-48	-39	-36	-36		**-44**
United Kingdom	-71	-56	-41	-33				**-86**
Türkiye	-16	-7	-6	-22	-4	-7	0	**-7**
Thailand	-96	-96	-94	-91	-81	-75	-66	**-86**
Spain	-41	-28	-29	-15	-12	-16	-8	**-18**
Mexico	-24	-22	-21	-15	-14	-14	-11	**-17**
Italy	-39	-22	-33	-26	-29	-23		**-28**
Germany	-68	-58	-51	-37	-28	-26		**-42**
France	-43	-34	-31	-30	-30	-36		**-33**
China								
World	**-64**	**-57**	**-51**	**-44**	**-38**	**-34**	**-28**	**-43**

Source: ENIT Research Department using UNWTO data

ENIT 1919 AGENZIA NAZIONALE DEL TURISMO

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

				% in local currencies, constant prices	
Destination/receipts in billions of Euro	2019	2020	2021*	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

Source: ENIT Research Department using UNWTO data

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.

				% in local currencies, constant prices	
Destination/receipts in billions of Euro	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
Italy	**44.3**	**17.3**	**21.3**	**-51.9**	**22.7**
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

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%).

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	Volumes 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	Volumes 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

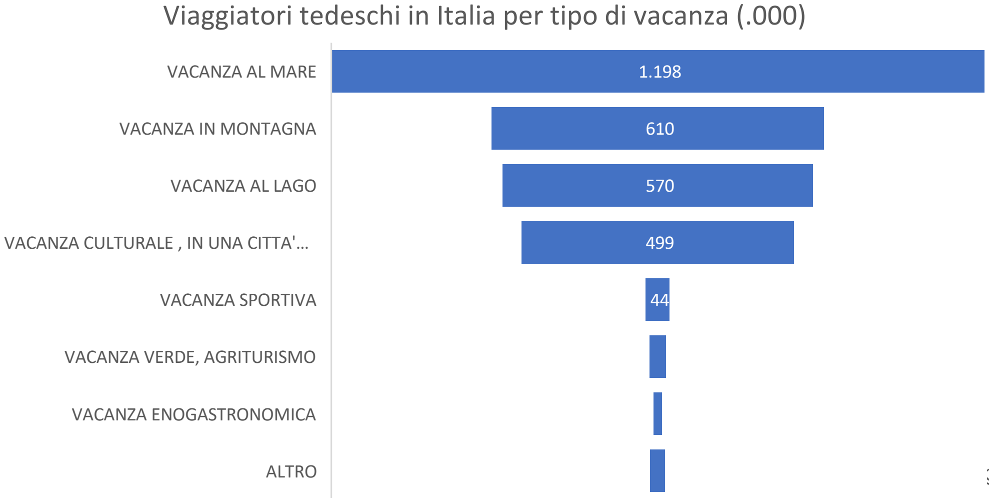
RATING PAESI DI ORIGINE PER PRESENZE 2019 IN ITALIA		RATING PAESI DI ORIGINE PER PRESENZE 2020 IN ITALIA		RATING PAESI DI ORIGINE PER PRESENZE 2021 IN ITALIA	
	Italia		Italia		Italia
1	Germania	1	Germania	1	Germania
2	Stati Uniti	2	Paesi Bassi	2	Switzerland and Liechtenstein
3	Francia	3	Francia	3	Paesi 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

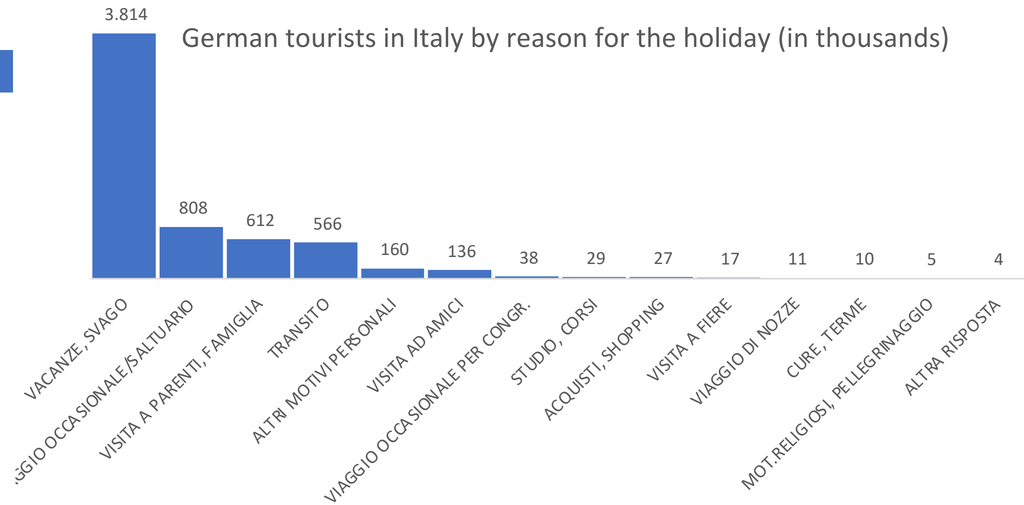
The new map of the markets

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 German trips to Italy – in thousands of travellers





Source: ENIT Research Department using Bank of Italy data

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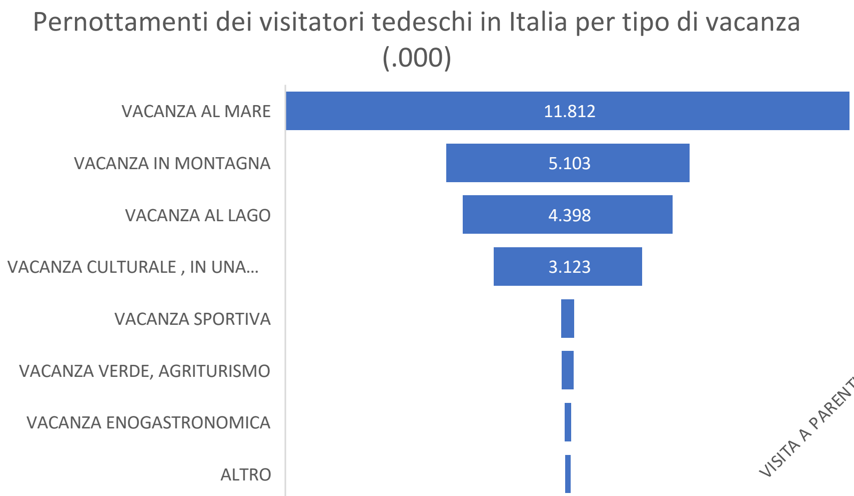
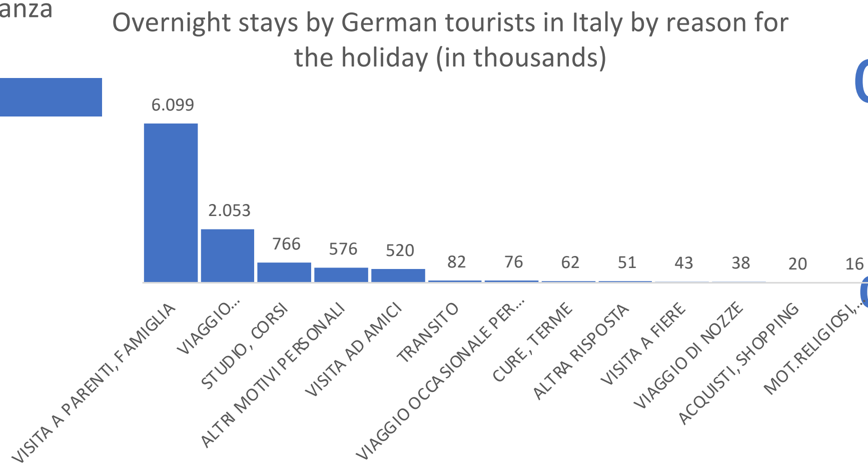
Reasons for German trips to Italy – in thousands of overnight stays

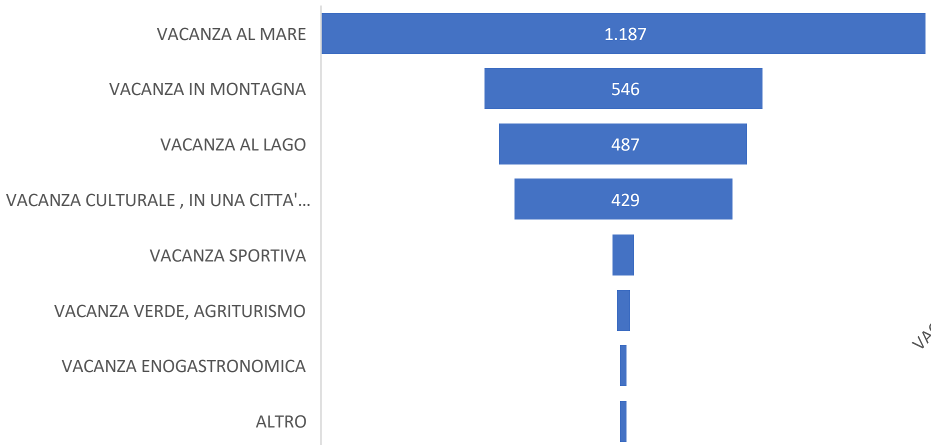


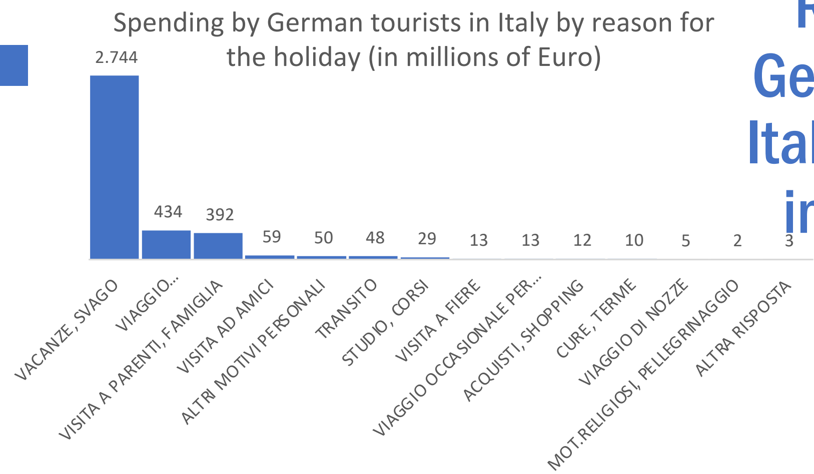


Source: ENIT Research Department using Bank of Italy data

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

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

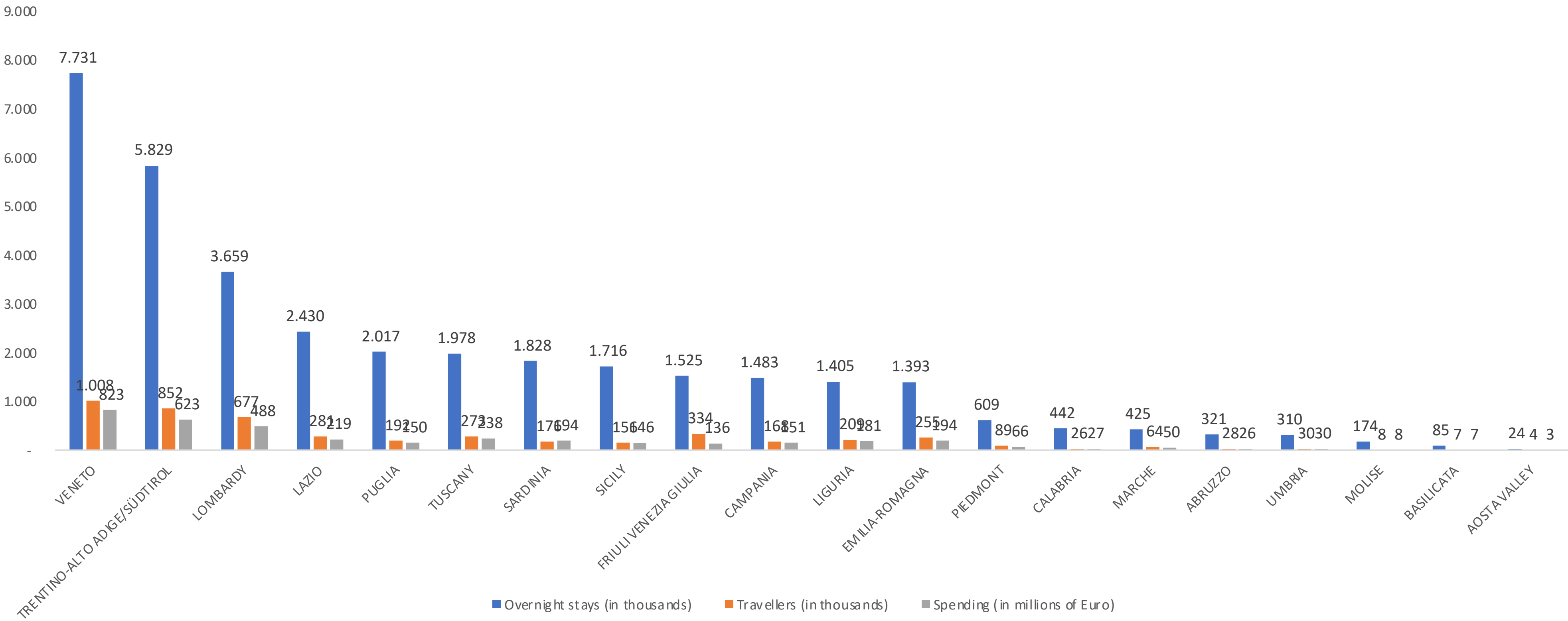




Source: ENIT Research Department using Bank of Italy data

AGENZIA NAZIONALE DEL TURISMO

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



Source: ENIT Research Department using Bank of Italy data

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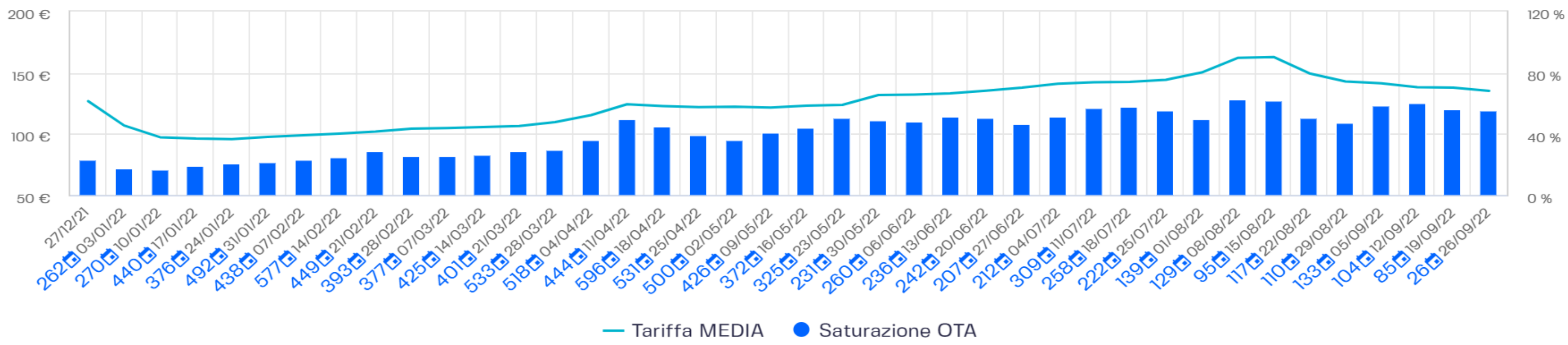
Occupancy in accommodation facilities found in Online Travel Agencies, Jan-Sep 22

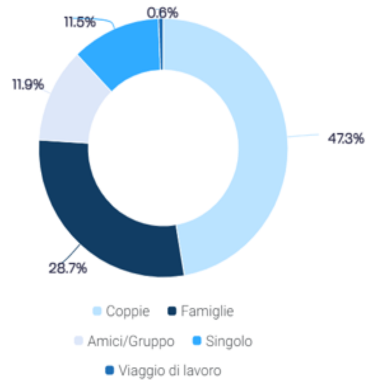


VISITATORI DOMESTICI VS. INTERNAZIONALI

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

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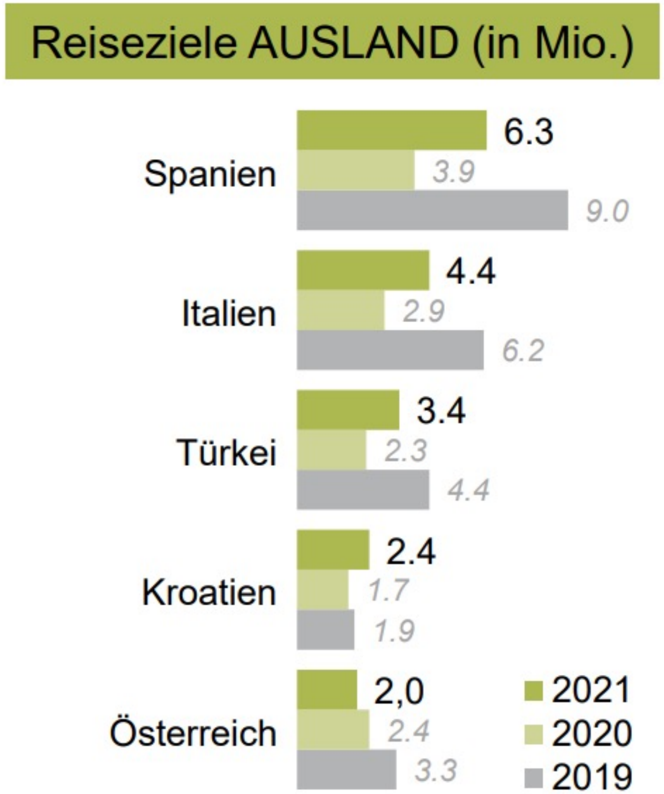
Travelling for holidays abroad in 2021

In 2021, there was an increase in journeys for holidays abroad of at least five days, especially to the destinations that saw the biggest decreases in 2020: Spain, Italy and Turkey.

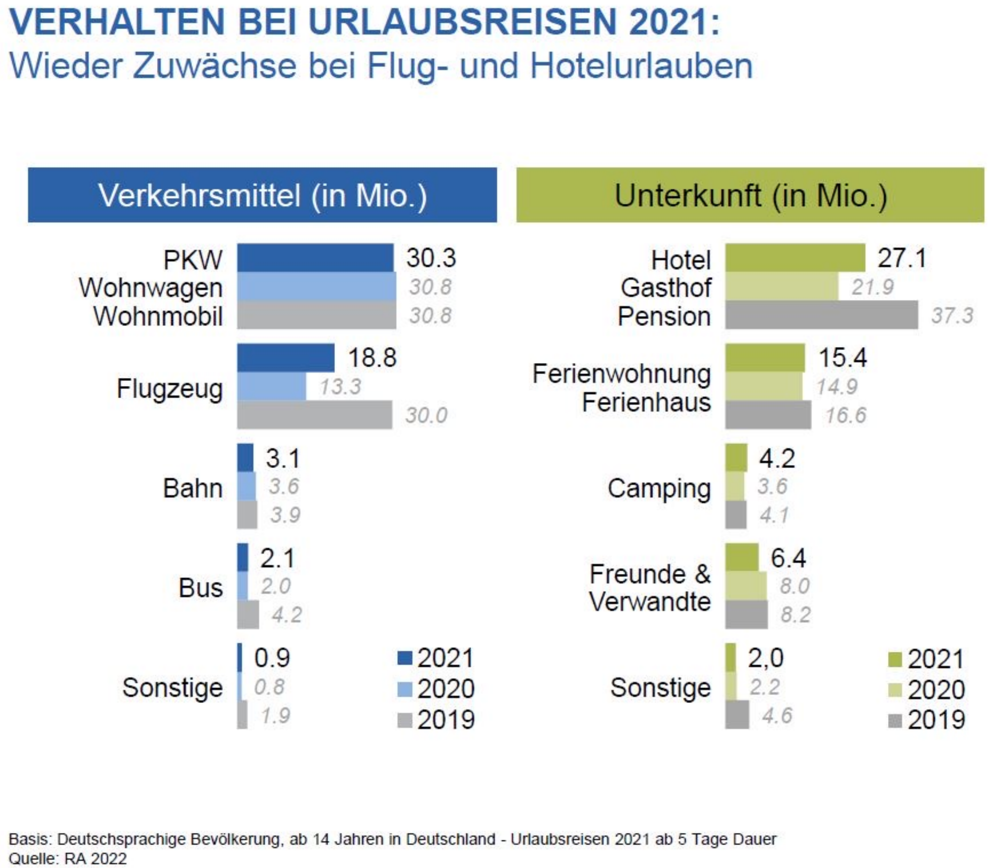
The volumes in 2021 were still below those seen in 2019. The only exception was Croatia, whose increase to above pre-pandemic levels saw it enter the top five destinations.



Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

Travelling for holidays abroad in 2021

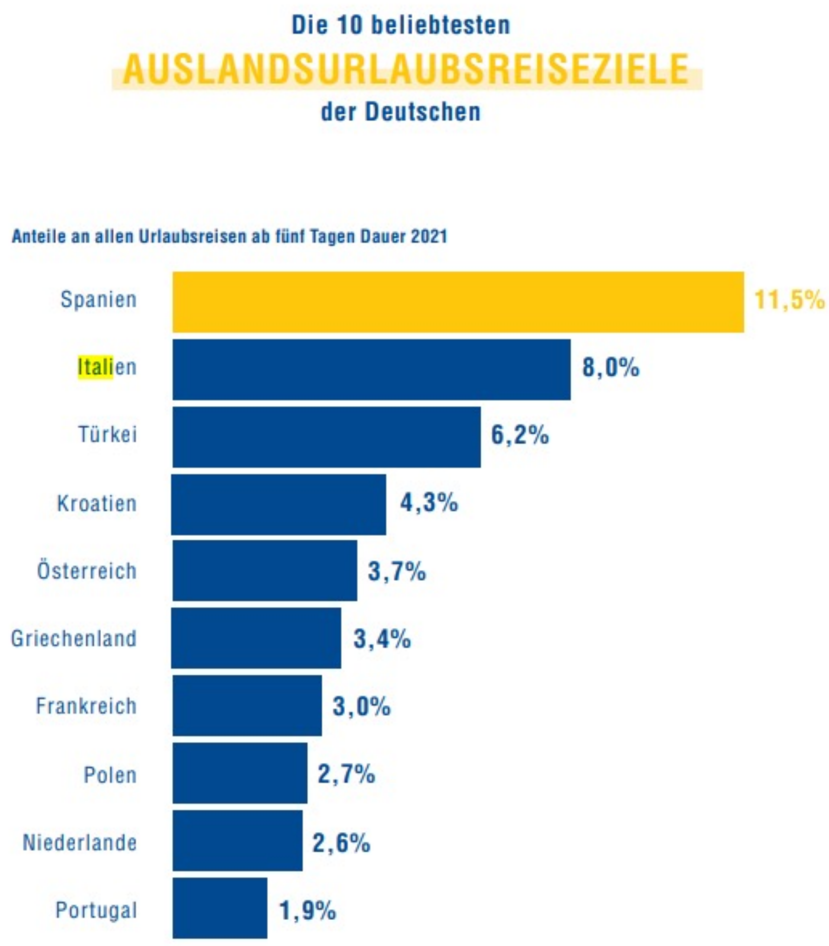
Consequently, there was a significant increase in flight arrivals (+5.5 million), stays in hotels and preferences for more individual types of accommodation, compared to 2020.



Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

Travelling for holidays abroad in 2021

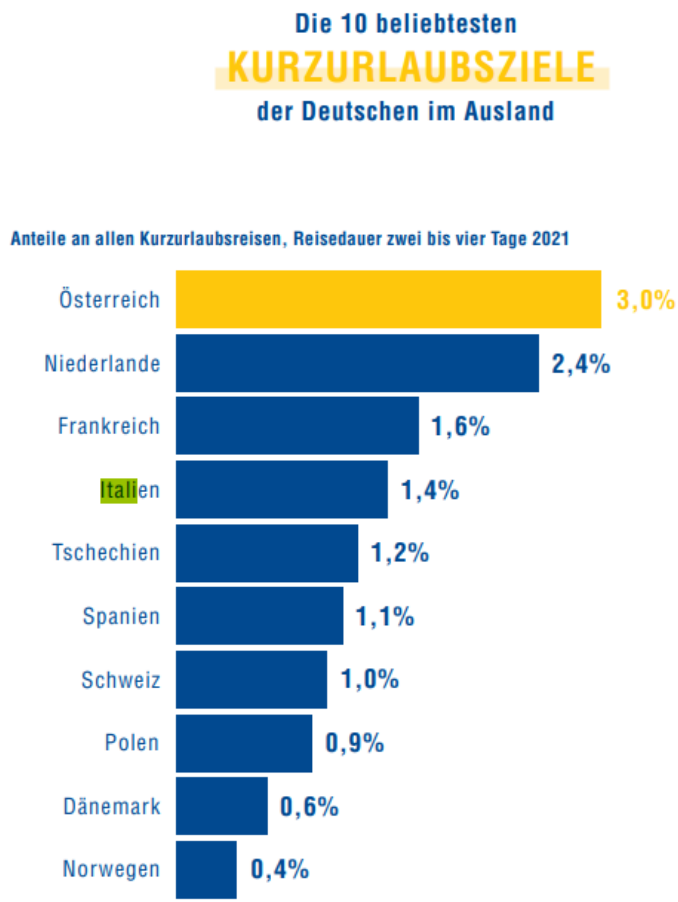
In percentage terms, **Italy** is the **second** most sought-after destination for travel abroad for holidays of five days or more (8%), after Spain (11.5%).
Next come Turkey (6.2%), Croatia (4.3%) and Austria (3.7%).



Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

Travelling for holidays abroad in 2021

Italy is also in the top 10 for journeys for short breaks abroad of between two and four days, in **4th place (1.4%).**



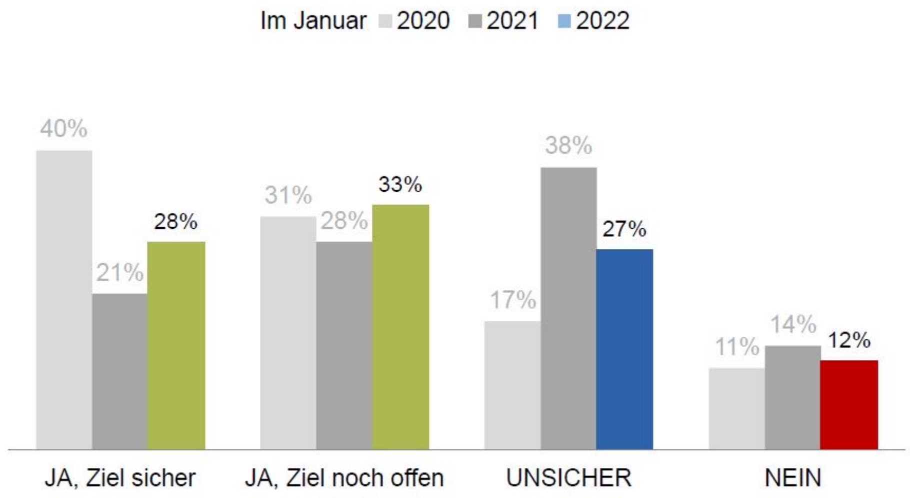
Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

Travelling for holidays abroad in 2022

The prospects for this year are good. The majority of Germans believe that travelling to go on holiday plays an indispensable part in their quality of life.

In the early months of 2022, more travel plans were already being made than in early 2021:
28% of people had already chosen their destination, 33% had yet to make a final decision, 27% were unsure, and only 12% were sure they would not be travelling (the same figure as before the pandemic).

REISEPLÄNE 2022:
Die meisten haben schon konkrete Pläne für Urlaubsreisen



Frage: *Wenn Sie jetzt einmal an dieses Jahr denken: Haben Sie für 2022 schon Urlaubspläne? Was von dieser Liste trifft auf Sie zu?*
Basis: Deutschsprachige Bevölkerung, ab 14 Jahren, in Deutschland
Quelle: RA 2022

Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

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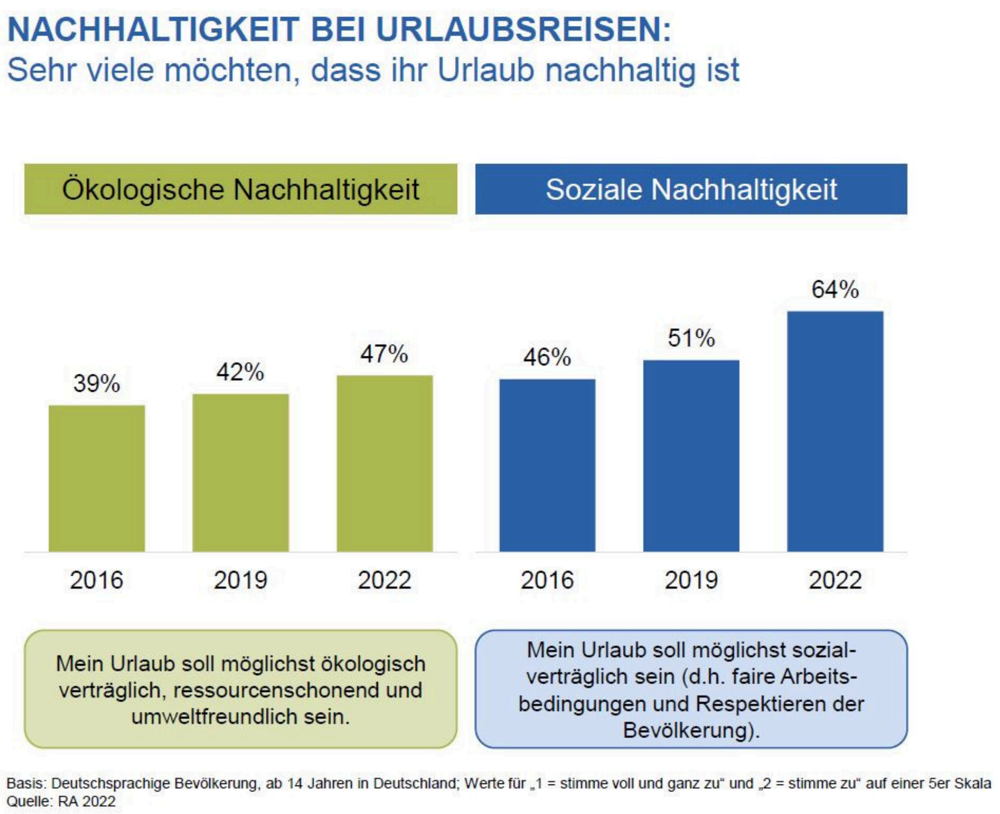
Travelling for holidays abroad in 2022

More and more people are underlining the importance of social sustainability (64%) and environmental sustainability (47%) in their holidays.
The figure has been constantly growing since 2016.

However, there is an *attitude-behaviour gap:* when choosing holidays, sustainability was only a decisive factor for 5% of people.
Having said that, a full return to pre-pandemic behavioural models is not expected until 2023.



Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

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Trends in volumes and travel in 2022

ZUSAMMENFASSUNG:
Trends bei Volumen und Reisezielen von Urlaubsreisen

RA ReiseAnalyse 2022

2019	2020	2021	2022	2023+
71 Mio.	**51 Mio.**	**55 Mio.**	***60-70 Mio.***	***70+ Mio.***
26% Inlandsanteil	45% Inlandsanteil	37% Inlandsanteil	*Inlandsanteil rückläufig*	*+/- 26% Inland*
17% Nachbarländer	18% Nachbarländer	15% Nachbarländer	*Nachbarländer gleichbleibend*	*Nachbarländer gleichbleibend*
38% Mittelmeer	26% Mittelmeer	35% Mittelmeer	*36% Mittelmeer*	*+/- 38% Mittelmeer*
8% Fernziele	4% Fernziele	4% Fernziele	*Fernziele erholen sich langsam*	*+/- 6% Fernziele*

Basis: Deutschsprachige Bevölkerung, ab 14 Jahren in Deutschland - Urlaubsreisen 2021 ab 5 Tage Dauer
Quelle: RA 2022; RA Trendstudie 2030 Update

Source: ENIT Research Department using Raiseanalyse 2022 data - interviews in German with people aged 14 and over

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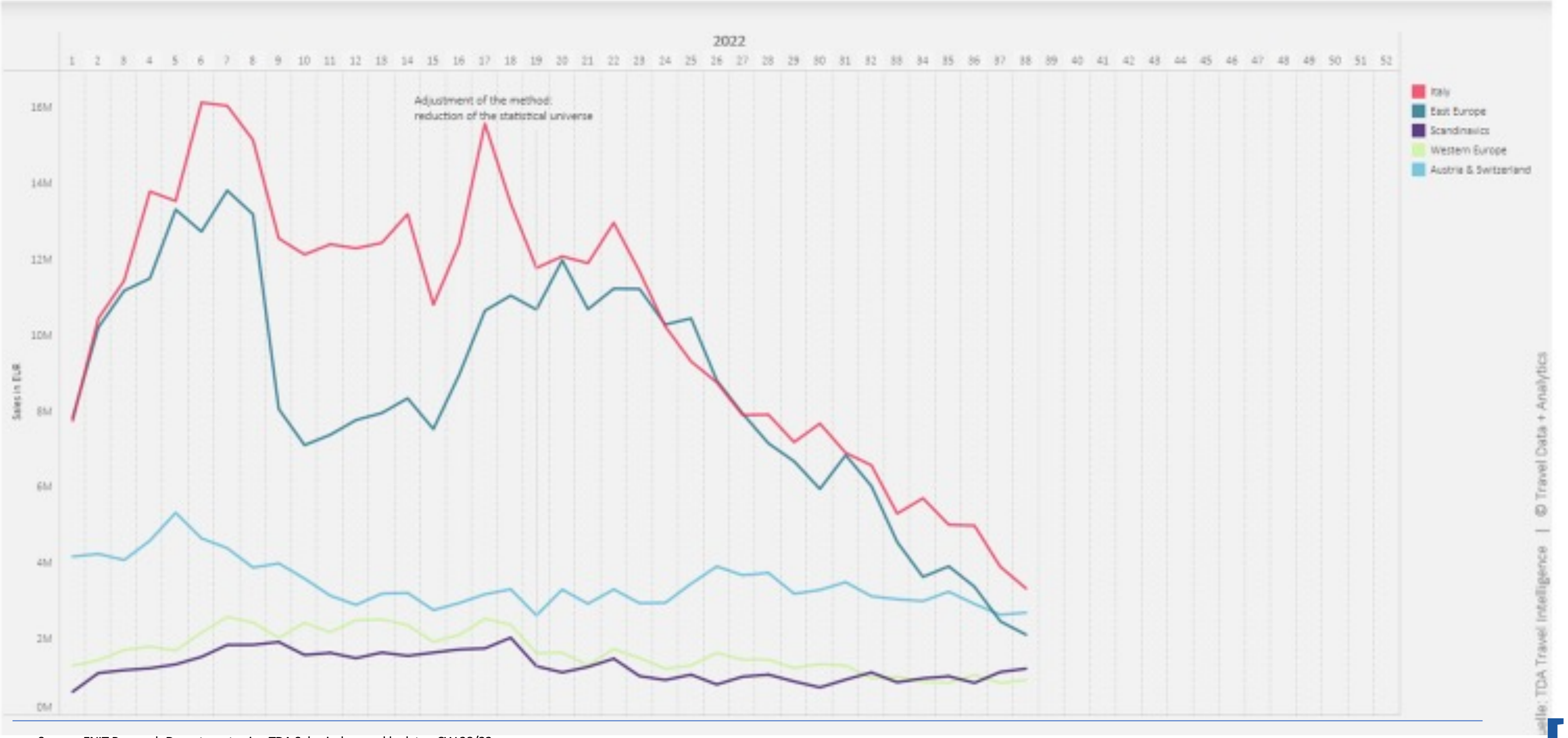
Travelling for holidays abroad in 2022

New Booking Intake by earthbound destinations: Italy is most booked, followed by Austria/Switzerland.

Travel Data + Analytics

Channel: ENIT Total Market (OTA & Travel Agency without Cruise) | Booking Period: until CW 38/22 | Fact: Sales Value EUR Mio. | New Bookings



Source: ENIT Research Department using TDA Sales index weekly data - CW 38/22

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FOCUS ON BAVARIA

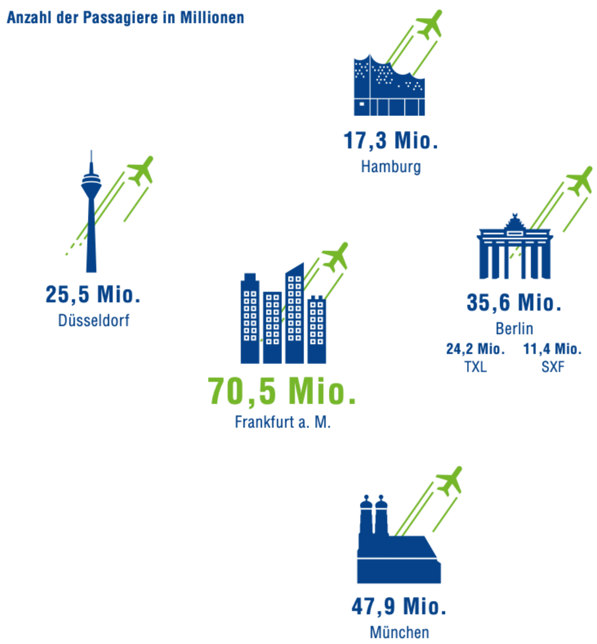
- General overview of Bavaria
- Profile of the average Bavarian tourist
- Focus on outdoor products

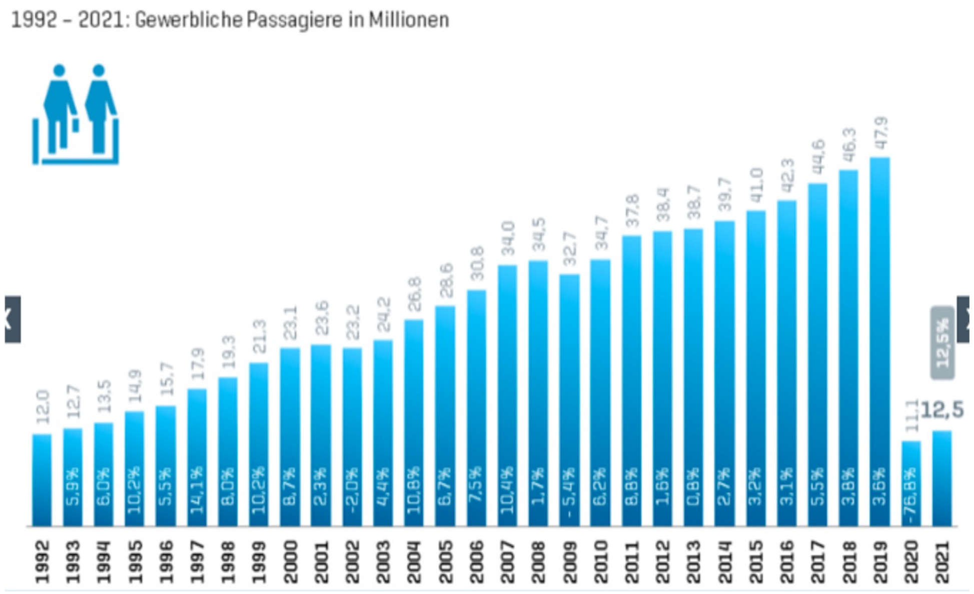
Bavaria: general overview

- The largest German state by land area (70,550 km^2)
- Inhabitants: 13,140,183 (approximately 15% of the German population)
- Capital: Munich
- It is a driving force behind the Germany economy, with high purchasing power and disposable income
- It is the most popular tourist destination in Germany (approx. 20%)

AGENZIA NAZIONALE DEL TURISMO

Munich Airport: passengers





 Sources: https://www.munich-airport.de/verkehrszahlen-88506; DRV Zahlen und Fakten 2019

Munich Airport

- At 13 million, the number of passengers flying in the first half of 2022 was higher than the number for the whole of 2021

During the Bavarian summer holidays

- Airlines recorded approximately **40,000 take-offs and landings at Munich Airport** approx. twice the amount in the 2021 summer holidays
- It is possible to fly to approximately **200 destinations** worldwide from Munich
- With **1,922 departures,** Italy was the top destination for **summer holiday flights**

Sources: https://www.munich-airport.de/presse-deutlicher-aufwaertstrend-im-ersten-halbjahr-14057300 - Pressemitteilung vom Juli 2022
Sources: https://www.munich-airport.de/presse-reisewelle-zum-start-der-bayerischen-sommerferien-14201160 - Pressemitteilung vom Juli 2022

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Purchasing power in Germany – GfK 2022

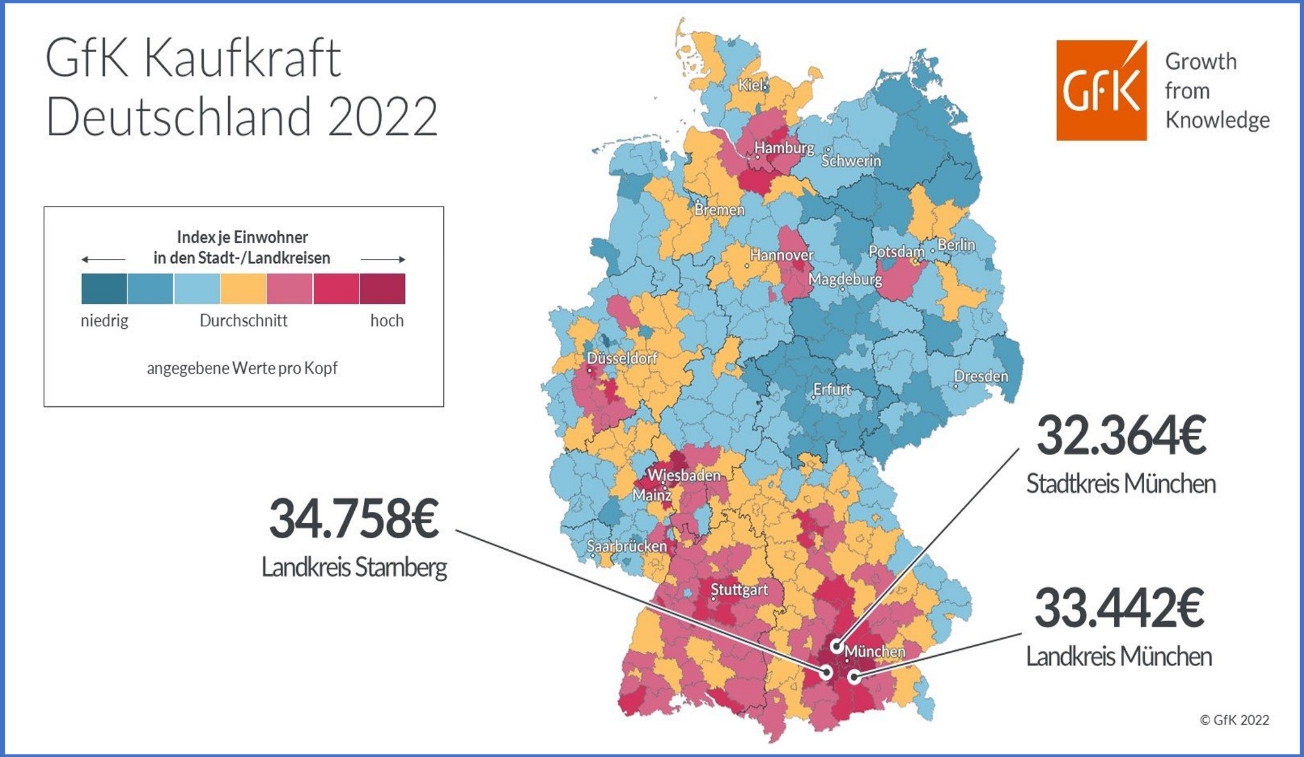
Rang 2022 (Vorjahr)	Bundesland	Einwohner	Kaufkraft 2022 pro Einwohner in €	Kaufkraft-index *
1 (1)	Bayern	13.140.183	26.936	108,6
2 (2)	Hamburg	1.852.478	26.645	107,4
3 (3)	Baden-Württemberg	11.103.043	26.637	107,4
4 (4)	Hessen	6.293.154	25.698	103,6
5 (5)	Schleswig-Holstein	2.910.875	24.661	99,4
6 (6)	Nordrhein-Westfalen	17.925.570	24.410	98,4
7 (7)	Rheinland-Pfalz	4.098.391	24.244	97,7
8 (8)	Niedersachsen	8.003.421	24.220	97,6
9 (10)	Brandenburg	2.531.071	23.313	94,0
10 (9)	Saarland	983.991	23.303	93,9
11 (11)	Berlin	3.664.088	23.088	93,1
12 (12)	Bremen	680.130	22.204	89,5
13 (13)	Sachsen	4.056.941	21.997	88,7
14 (14)	Thüringen	2.120.237	21.826	88,0
15 (15)	Sachsen-Anhalt	2.180.684	21.718	87,5
16 (16)	Mecklenburg-Vorpommern	1.610.774	21.707	87,5

Quelle: GfK Kaufkraft Deutschland 2022

* Index je Einwohner; 100 = Landesdurchschnitt

Sources: “GfK, GfK Kaufkraft in Deutschland 2022 / December 2021 data”

Purchasing power in Germany – GfK 2022



 Sources: GfK, GfK Kaufkraft in Deutschland 2022 / im Januar - https://www.gfk.com/de/insights/bild-des-monats-gfk-kaufkraft-deutschland-2022

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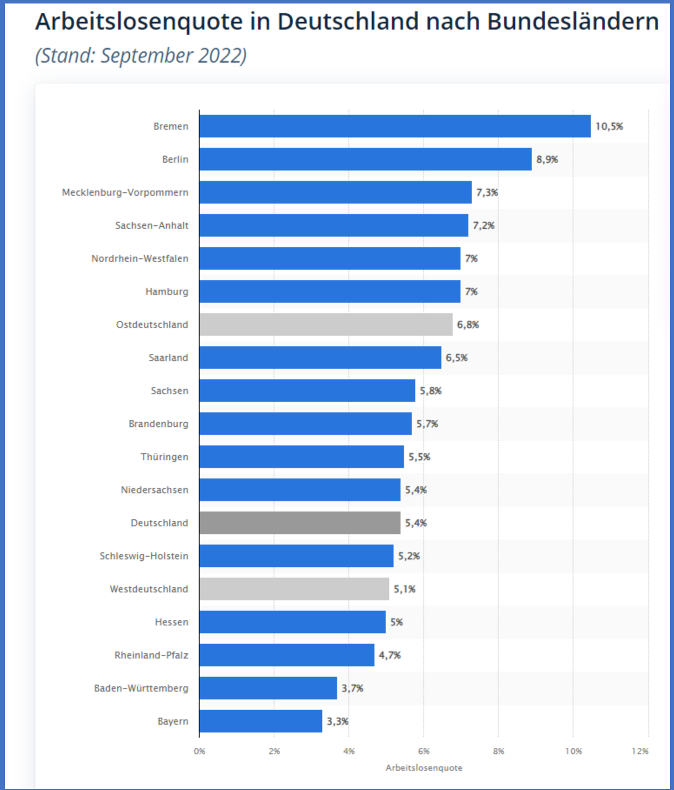
Unemployment rate



- After a seasonal increase in unemployment figures in early 2022, the unemployment rate dropped until May, than began to increase again from June onwards.
- The average unemployment rate in Germany is 5.4%, with highs in Bremen (10.5%) and Berlin (8.9%). It is at its lowest in southern Germany, in Baden-Württemberg (3.7%) and Bavaria (3.3%)

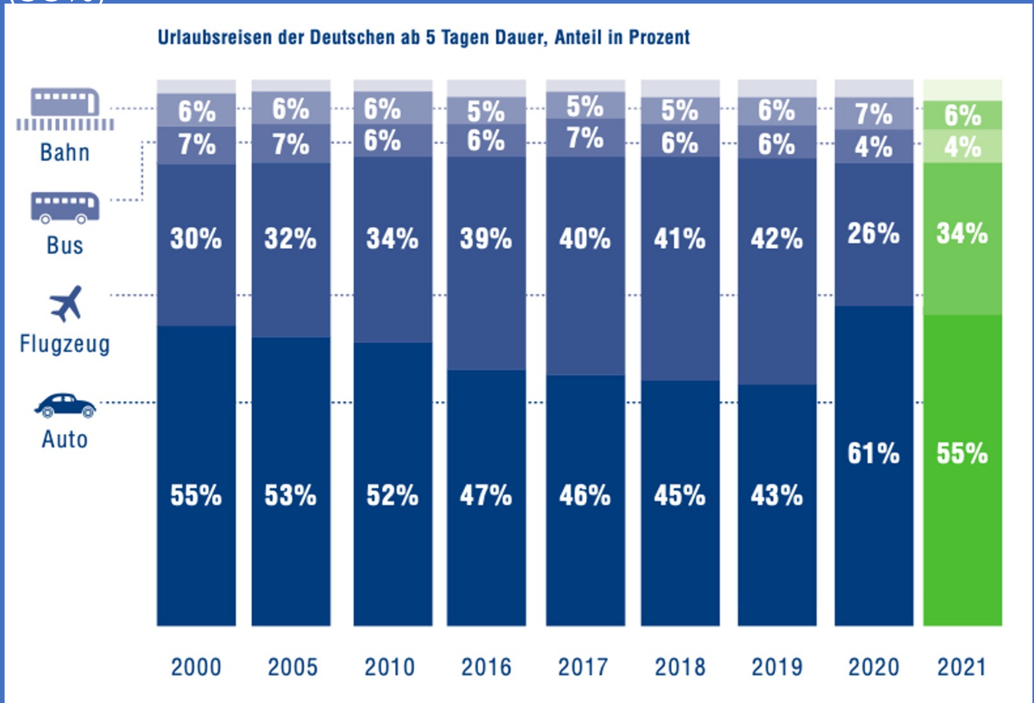
Sources: Statista.de https://de.statista.com/statistik/daten/studie/36651/umfrage/arbeitslosenquote-in-deutschland-nach-bundeslaendern/ / Figures in September 2022

Profile of the average Bavarian tourist

- They know a lot about Italy and its culture
- They have **medium to high levels of educational attainment** (38.8% have a degree or postgraduate qualification)
- They have **high purchasing power**
- They have **high spending capacity** (between €3,000 and €5,000 a month in 45% of cases)
- German travellers **are well organized, orderly and mindful**
- They plan carefully and look for **detailed information** from a number of sources before departure
- They are among the **most demanding** tourists in the world
- They seek out **new adventures and authentic experiences during their holidays**, focusing in particular on history and culture

Means of transport

The car was the most commonly used means of transport by Germans in 2021 (55%)



- Faster and more practical
- Less contact with potentially infected people
- Makes it possible to return home immediately
- Independent travelling

Source: DRV Zahlen und Fakten 2022

Outdoor tourism products

- Active holidays > genuine contact with nature
- The German outdoor market has been growing rapidly for years, with the turnover expected to reach €2.5 billion by 2025 according to Statista
- Hiking: approximately 70% of Germans go on regular hikes
- Extreme sports (parachuting, free diving, bungee jumping)
- Climbing (according to DAV, there are 500,000 sport climbers and boulderers in Germany)

Source: Regiondo – Tourismus Trend 2022.pdf

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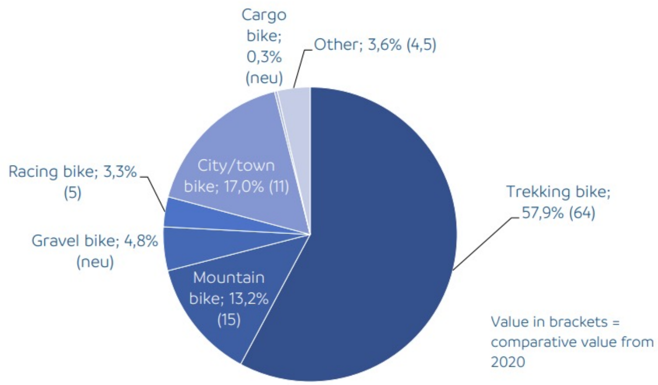
Cycling tourism products

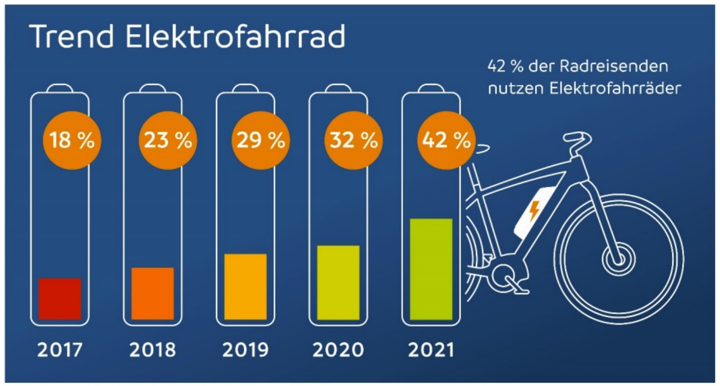
Cycling in general

82% of Germans cycle occasionally to regularly.

- 78% daily journeys
- 68% cycling day trips and
- 41% sport

24% bought a new bicycle in 2021. Almost half of the new bicycles purchased were an e-bike (49%).

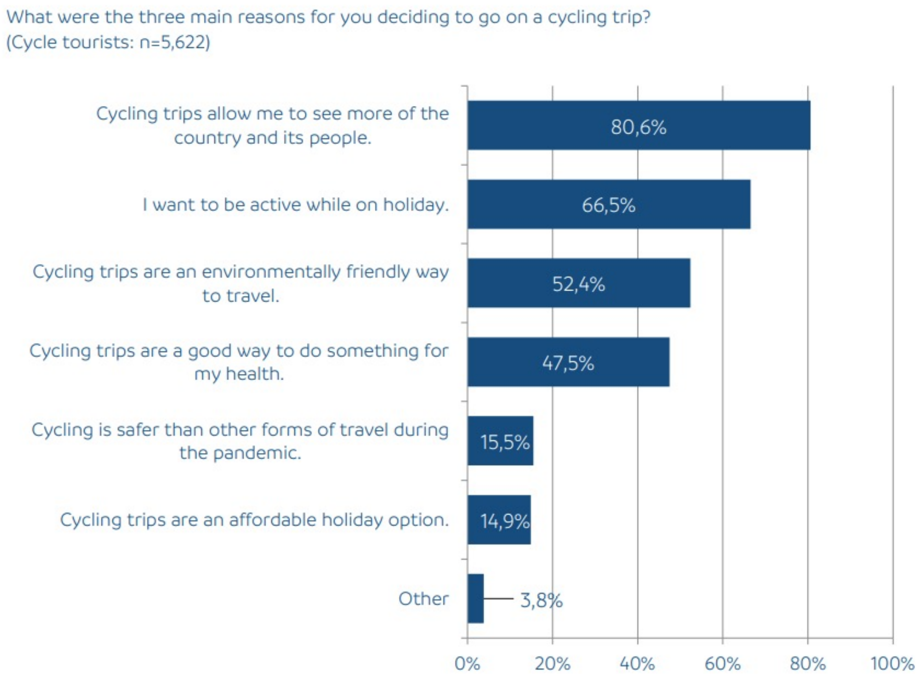




Use of e-bikes by cycle tourists © ADFC/april Agency

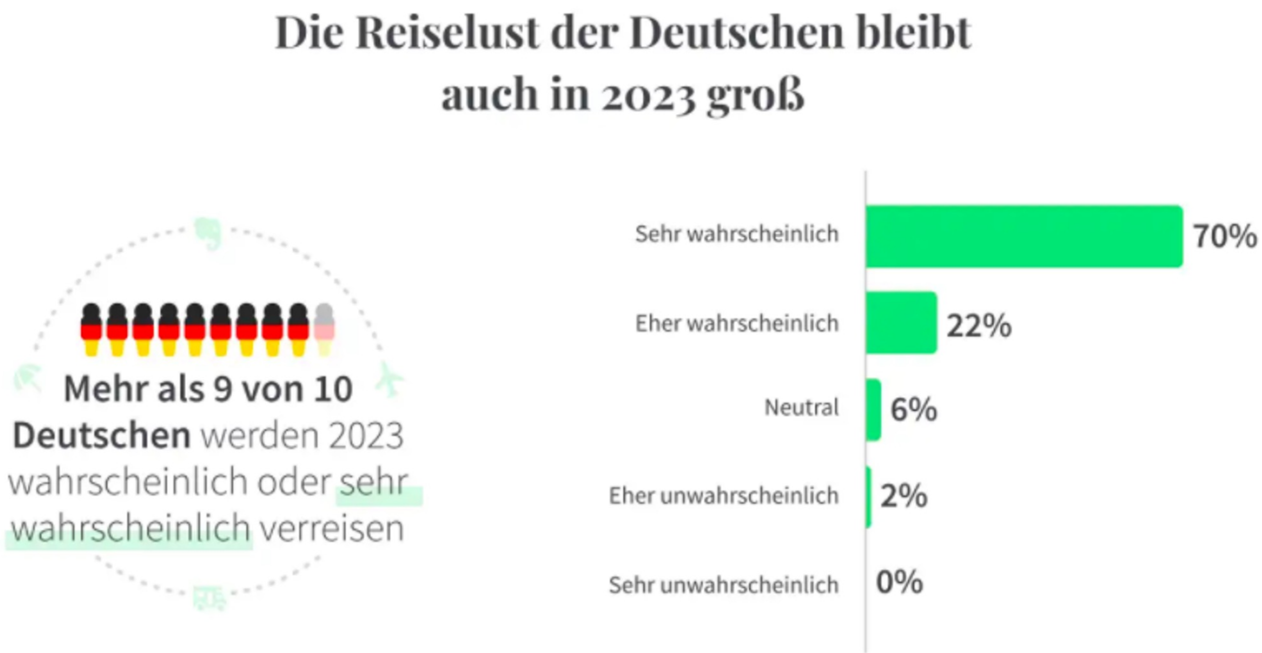
 Sources: ADFC Bicycle Travel Analysis 2022

Cycling tourism products



 Sources: ADFC Bicycle Travel Analysis 2022

Travel plans for 2023



Source: https://www.tourlane.de/umfrage-reisetrends/

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Italian Ambassador in Berlin

"The relationship between Italy and Germany is like a long marriage: it should never be taken for granted. You need to nourish it and always keep it alive. There's a lot of history and there's also been a lot of passion over many years. **Never rest on your laurels. New efforts must be made and new challenges faced every day.**

H.E. Armando Varricchio

Thank you

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