

Italian tourism, sustainability is measured in facts

The whole economy of our territories drives holiday choices in Italy and supports the sustainability of the experience:

- 1) the **agri-food sector** with our typical products is increasingly encouraging people to learn about and appreciate the traditions and history of our country;

Italian food products are known all over the world and they are in very high demand. This is evidenced by the value of Italian agri-food exports: around 34 billion euro in the first 6 months of 2024, an increase of +7.1% compared to January-June 2023. This total is expected to reach EUR 70 billion by 2024.

In the first half of 2024, the main destination countries for Italian agri-food exports are Germany, the United States, France, the United Kingdom and Spain.

Germany has a 15.4% share of total Italian agri-food exports. It is followed by the US and France with 11.0% and the UK with 6.8%.

On the other hand, in tourism, exports (i.e. incoming flows for tourism) in the first 9 months of 2024, see the main source markets by number of travellers coincide with those of agri-food exports: Germany remains firmly in first place with a 14.8% share of incoming travellers. It is followed by France (13.2%), Austria (7.9%), the United Kingdom (7.5%), but also Switzerland (7.4%), Spain (6.0%), the United States (4.6%) and Japan (0.3%). All of which are on the increase compared to 2023. (source: data processed by ENIT SPA Research Office)

- 2) **food and wine** in our restaurant industry is at the forefront of tourists' choices as the main holiday motivation that is no longer restricted to a niche market;

Looking at holiday types, spending on cultural holidays, around EUR 18 billion, accounts for 34.6% of the total expenditure by international visitors to Italy, with a growth in 2023 of +50.6% compared to 2013. Green holidays also increased by +4.33%, but the growth of the wine and food holiday was more noticeable (+176%). This has meant it growing from a niche tourism segment at the beginning of the century, to an added value in the first decade, to being a real holiday motivation today.

Overall, a total of 363 million euro is spent on food and wine by international tourism alone, an exceptional driver of direct experiences related to the traditions and flavours of our tourist destinations, enhancing not only the spearheads of our tourist offer but also, and above all,

the country's inland areas that are the main custodians of our original identity on which they can base their competitive positioning.

In terms of volume, 1.1 million foreign visitors choose this type of stay and spend 1.8 million overnight stays in wine and food.

Germany also ranks among the top food and wine tourism markets for tourist overnight stays with over 100,000 travellers staying 361,000 nights, with a total of over 58 million euros spent on this holiday alone.

3) **the cultural industry** becomes the spokesperson for the new climate-sensitive tourism proposals by adapting its offer in ways that are better suited to counter the effects of climate change;

A prime example is the Archaeological Park of Pompeii which, with evening openings dedicated to the general public not only offers a more enjoyable visit far from the summer heat, but also animates the cultural visit to the site with theatrical performances, historical re-enactments and educational activities for children. This modality also involves the Stabia Archaeological Museum with specially renovated layouts and underground tours. Also thanks to this diversification, the Archaeological Park of Pompeii had more than 4 million visitors, an increase of +33.6% (source: direct survey by ENIT SPA Research Office).

4) Tourists not only choose to holiday in Italy with a light ecological footprint (even Italians themselves consider sustainable holidays 86% important) but they also participate in social and environmental enhancement activities in destinations by activating **regenerative tourism** stays;

This is a new form of sustainable holiday that goes beyond the concept of protecting the destination's environment to actively contribute to the enhancement of the territory's natural and social ecosystem, with initiatives shared with tourists for environmental recovery and waste collection at sea, on the coasts, and in nature parks, but also for learning and sharing with fellow travellers the techniques of production, harvesting and agricultural processing, handicrafts and local cuisine. It is also a contribution to spreading and passing down those identity values that make the experience in Italy a unique opportunity for participation and a testament to Italian heritage.

In addition to this, new ways for tourists to participate are evidenced by the strategies

implemented by destinations to engage tourists, such as #EnjoyRespectVenice or #EnjoyRespectFlorence, a related campaign of good practices that tourists agree to adopt to support the local economy and contribute to preserving the environment.

According to Booking data, 44% of high-spending consumers in Europe, Asia and North America would be willing to increase their travel spending by 10% if it contributed to environmental protection; 39% of them would even be willing to spend more than 10% more. Also in Italy, 64% of Italian tourists consider the environment and sustainability as influential factors in their travel decisions, a figure that rises to 71% among the under-35s. In addition, 75% of Italians believe that the growth of sustainable tourism is crucial for the country's ecological transition, while 63% prefer local tourist destinations to promote proximity tourism and enhance Italian villages. For further information see <https://www.enit.it/it/turismo-priorita-adattamento-climatico>.

5) **the open air holiday** is becoming more established as a holiday segment in international markets, with new ways of experiencing it, from glamping to the revival of multigenerational family vacations (data)

In 2023 (latest available data), there will be about 20,000 agritourism establishments in Italy with more than 295,000 beds. This is an open-air holiday formula for which tourist arrivals exceed 4.5 million, with a steady upward trend since 2018 (+11% in 2023).

The outdoors is a holiday choice that specifically attracts international tourists in 51.0% of cases and has continued to grow since the years before the pandemic (+17.6%).

The total number of overnight stays amounted to 16.6 million, with international markets accounting for even more, at 60.0% of the total. The average stay was 3.7 nights, 3 for Italians and no less than 4.3 for foreigners.

Also, looking at this type of holiday in the long term, it emerges that in 2023 compared to 2015, growth reached +62.7% for arrivals and +47.2% for overnight stays.

In terms of attendance, the top 5 countries of origin are Germany, accounting for 41.0% of the international total, the Netherlands (8.0%), the United States (6.5%), France (4.5%), Switzerland and Liechtenstein (4.8%).

6) Focus on **Germany**

According to the Reiseanalyse survey of the Forschungsgemeinschaft Urlaub und Reisen (FUR), the overall picture of holiday travel in 2025 is positive. It is expected to achieve volumes similar to pre-pandemic levels, or even higher.

By 2025, an estimated 72 million holiday trips of at least 5 days are expected, which is higher than the 65 million in 2023 and the 71 million in 2024, which reached the 2019 level.

Holiday travel is a top priority, so much so that many German tourists have already planned and booked in advance.

The propensity to travel is therefore high: 76% of respondents have already planned trips for 2025 (compared to 67% in 2024), 42% of which have already chosen a precise destination, while 34% have not yet decided on one.

Mediterranean destinations (42%) and long-haul destinations (8%) are particularly popular. For these destinations, airline reservations are made in advance, often through travel agencies and tour operators, to ensure smoother organisation of the trip. This suggests an increase in air travel.

Respondents showed significantly more interest in city trips, wellness, cruises and camping. However, relaxation, family and beach holidays continued to top the preferences.

Sustainability has once again taken centre stage. More and more respondents believe that their holiday should be ecologically friendly, resource-saving and environmentally friendly (48%), but also socially responsible (62%). (Source: ENIT Research Office based on FUR data)

The analysis of the perceptions and travel motivations of the German market shows that Italy is particularly popular for its natural landscape - mountains, coasts, countryside (about 68%, multiple answers possible), its food and wine (56.7%) and its history and cultural heritage (50.8%).

83.2% of respondents have already travelled to Italy on holiday, and 43.2% of these more than three times.

The most visited locations include cities of art (67.4%, multiple answers possible), rural and

hilly areas (45.2%) and mountainous areas (39.4%). These places also correspond to the main reasons that prompted respondents to visit Italy on their last holiday: cultural tourism (museums, historical sites, etc.) for 13.6%, nature tourism (sea, mountains, nature) for 16.0%, sun and good climate for 17.0%, and finally nature and beautiful landscapes for 11.4%.

Some 44.0% of respondents plan to return to Italy on holiday in the next 3 years. (Source: Tecne direct survey for ENIT Research Office)

In the period from January to September 2024, Italy welcomed 10.6 million foreign tourists who generated more than 55.3 million overnight stays and a total expenditure of EUR 7.4 billion.

The comparison with 2023 shows a positive picture: tourist flows show a 2% increase in the number of visitors, accompanied by a more marked growth in tourist expenditure (+8.7%), a sign of quality tourism, while overnight stays remain stable (-0.5%).

In the first nine months of 2024, Italy confirmed itself as a favourite destination for European travellers, with Germany firmly holding the lead among source markets, accounting for 14.8% of total international arrivals. They are followed, in order of importance, by France with 13.2%, Austria at 7.9% and the United Kingdom at 7.5%, as well as Switzerland (7.4%) and Spain (6.0%), which consolidate their presence among the main tourist basins.

Airport traffic also confirmed the favourable trend with 2.6 million passengers choosing to stay in Italy after arriving at the airport, in line with industry trends. Looking ahead to 2025, bookings already made indicate strong interest from the German market: in the first six months of the year, around 1.2 million travellers are expected to arrive from Germany, with Frankfurt (over 567,000 passengers), Berlin (over 437,000) and Munich (343,000) airports as the main departure hubs. (Source: ENIT Research Office based on CLIA 2023 data).