

PR Meeting APT Servizi Emilia-Romagna

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In 2016, many destinations experienced political turmoil

Violence and political unrest both in Europe and around the world remained in the headlines in German print media and kept travelers away.

- Terrorism in Syria
- Brexit
- Political instability in Turkey
- Refugees coming to Europe
- Presidential elections in the USA
- Earthquakes in Italy



Terrorism in Syria

- Syria has been a victim of terrorism
- Multiple terrorist acts afflict the country and left thousands of people homeless



Brexit

Great Britain's referendum to decide whether the UK should leave or remain in the EU was held on June 23rd, 2016.

Leave won by 52 % to 48 %.

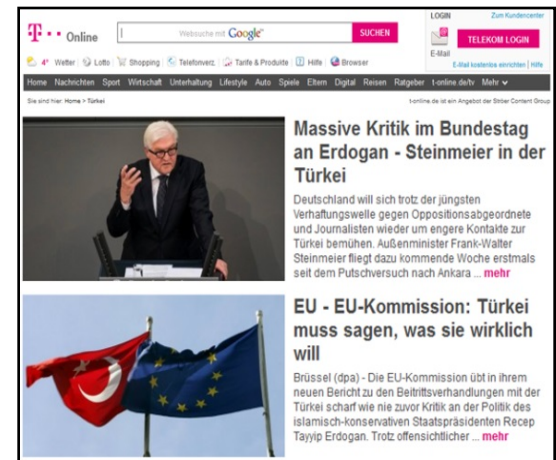
- Leaving the EU will affect tourism
- A significant decline in visitor numbers from the UK to Italy is predicted for 2017



Source: Abendzeitung, 2016: www.abendzeitung-muenchen.de/inhalt.referendum-der-briten-ablauf-folgen-was-man-zum-brexit-wissen-muss.9379fcb8-a9f6-4f5c-955a-6bb821934ca4.html

Turkey

- Turkey is on the way to becoming a modern dictatorship
- The tensions between Turkey and Europe increase
- Protests against the authoritarianism of Erdoğan's government since 2013
- Erdoğan is criticized for politicizing media
- The opposition alleged that over 1,863 journalists lost their jobs due to their anti-government views

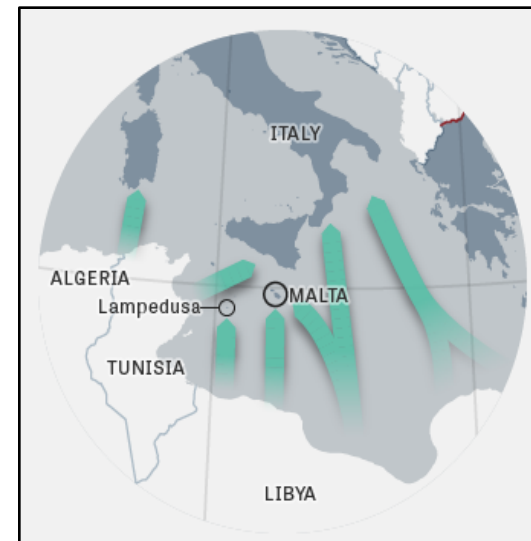


Source: Der Tagesspiegel 2016, www.tagesspiegel.de/themen/tuerkei

Refugees coming to Europe

For each of the years 2015, 2016 und 2017, approximately one million refugees are expected to come to Germany. Refugees will continue to come to Europe in the future.

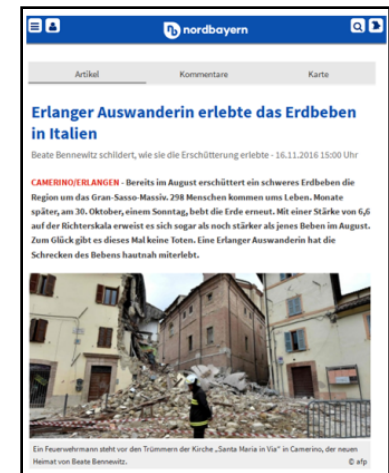
- Impact on Germany's safety and security image
- Since the sea route to Greece is blocked, most refugees use the route to Italy
- In 2016, approximately 167,500 refugees reached Italy



Source: UNHCHR, 2016: <http://data.unhcr.org/mediterranean/country.php?id=105>

Powerful earthquakes in central Italy

- At least three seismic earthquakes of at least 5.5 on the Richter scale shattered central Italy in August and October
- Tourists started avoiding the whole region where the earthquakes struck
- The fear of possible new earthquakes in the region caused a massive decrease in guest arrivals in central Italy, e.g. decrease of 27 % since August in Umbria
- Anxiety of travelers



Source: Die Zeit, 2016: <http://www.zeit.de/gesellschaft/zeitgeschehen/2016-10/italien-erdbeben-perugia>

Presidential election in the USA

- Since the election, the travel opinion portal HolidayCheck analyzed a decrease of 39 % in the number of Germans willing to travel to the US
- Kayak.com (OTA) realized a reduction of flight bookings of 30 %
- The election also has an influence on the dollar rate - analysts predict a dollar rise, which makes the country more expensive for travelers
- Fewer tourists are expected to visit the USA



Source: Press Release HolidayCheck, 2016

Summary: status quo in Germany, Austria and Switzerland

- Low interest rates, a robust job market and rising wages are summed up in strong expansion rates
 - Despite a weakness in the global economy, the German economy is expected to remain on a solid basis for 2017
 - A touristic reduction is expected in markets such as: UK, Russia and France
 - Further increase of global insecurity
- Travelers focus on invulnerability - safety FIRST
- Chance for more intense PR activities for Italian market
- Chance to gain more tourists and travelers from DACH (Germany, Austria and Switzerland) for holidays in Italy

Source: OECD 2016: <http://www.oecd.org/economy/germany-economic-forecast-summary.htm>

Elections in 2017

Several presidential elections are taking place in Austria, Germany, Netherlands and in France.

Italian constitutional referendum: December 4, 2016

Austrian presidential election: December 4, 2016

Dutch parliamentary elections: March 17, 2017

French presidential election: April 23, 2017

German federal elections: September 2017

→ Is Europe turning right? - YES

→ Impact on tourism? - YES



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Development of German travel behavior

Development of German travel behavior

German travel behavior has not changed:

- Germans love to travel - unbroken and ever since
- In 2015, around 53 million German holiday travelers spent a total of 1.7 billion travel days
- Germans spend about 65.9 billion € for their main travels (954 € p.p.)
- After China, the Germans are **travel world champions**
- Trend: Safety plays an important role: Germans travel with less risk and more secure destinations



Source: FUR Reiseanalyse 2015

Development of German travel behavior

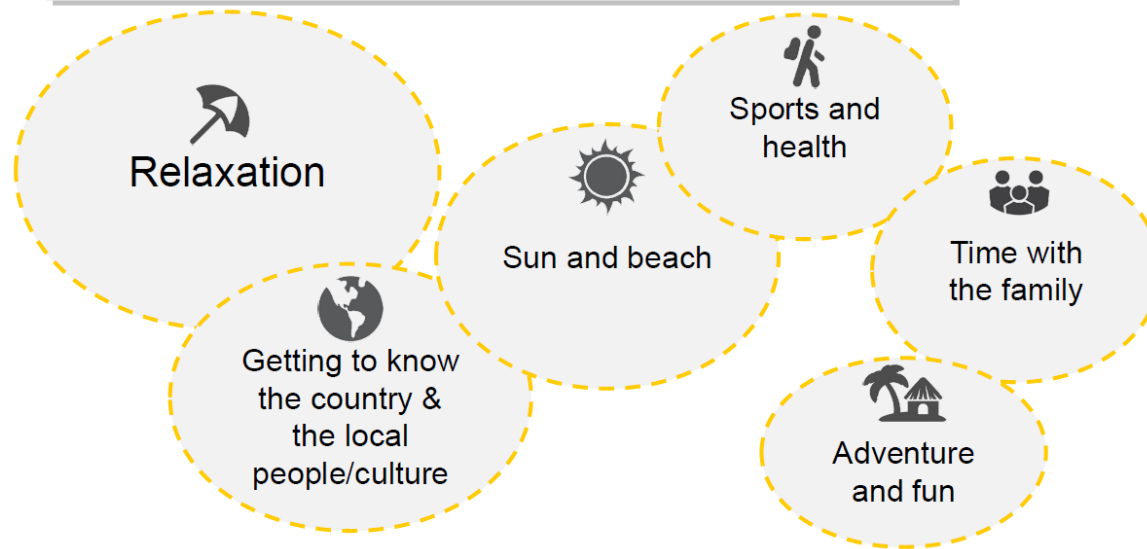
Relaxation and enjoying sun and beach are the main groups of reasons of German travel behavior in 2016.

General reasons to go on holiday

Groups of reasons

ADAC
Reise-Monitor

There are 6 main groups of reasons, the most frequently cited reason being relaxation



Source: ADAC Reise-Monitor 2016,
All respondents who provided information, n=2,739 / the bigger the bubble, the more frequently the reason was mentioned.

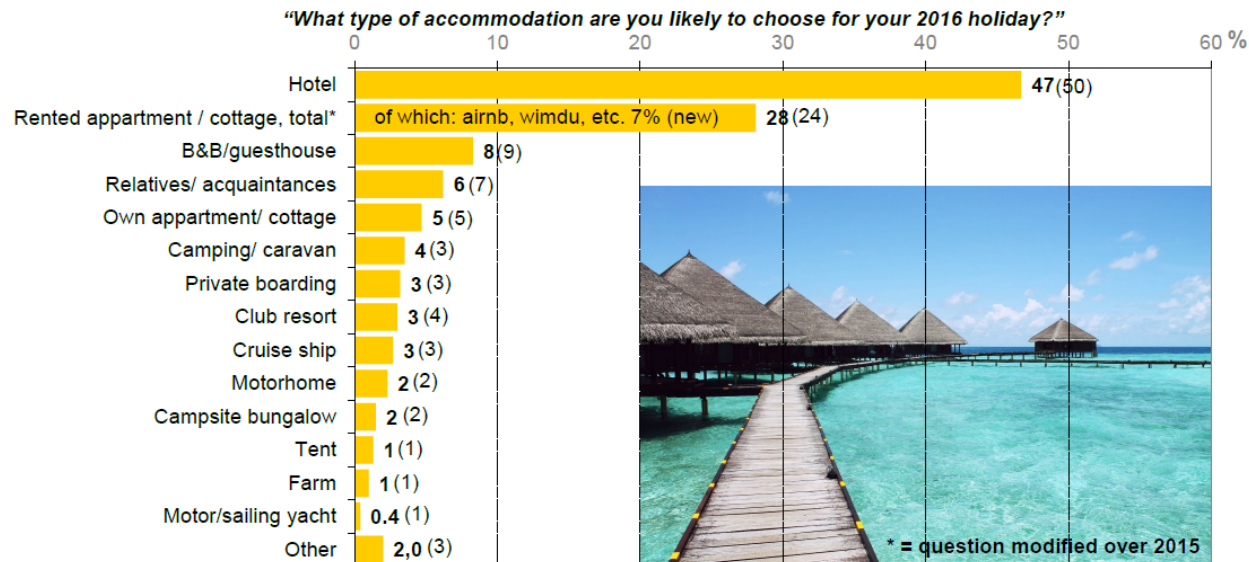
Development of German travel behavior

For the accommodation planning in 2016, more than one in four respondents prefers to rent an apartment or cottage.

ADAC
Reise-Monitor

Accommodation planning in 2016 (2015) Main holiday

Hotels still no. 1 accommodation. More than one in four respondents prefers to rent an apartment or cottage

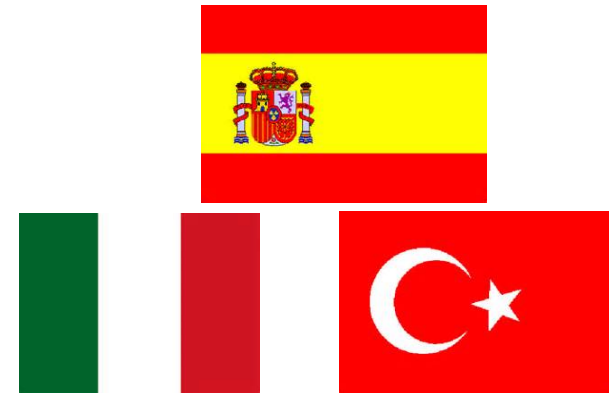


Source: ADAC Reise-Monitor 2016, Basis: respondents planning a main holiday of at least 5 days duration and indicating the type of Accomodation 2016/2015; n=2,069/1,914 14

Top holiday destinations for Germans

Spain was the most popular travel destination of Germans in 2015, followed by Italy, Turkey and Austria.

1. Spain	13.1 %	-0.4
2. Italy	8.2 %	+0.4
3. Turkey	7.3 %	-0.3
4. Austria	5.3 %	-0.4
5. Croatia	3.2 %	+0.1



- 1/3 of Germans travel within Germany
- 1/3 of Germans enjoy vacations by the Mediterranean
- 1/3 of Germans travel to other destinations around the world

Source: FUR Reiseanalyse 2016

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Tourism development in Italy

Tourism development in Italy

In 2016, Italy was the most popular main destination of Germans after Spain.

Main reasons for the leisure travels of Germans visiting Italy:

1. Bathing holidays
2. Stay in the mountains and in the countryside
3. City trips
4. Family destination



- In 2016, Europeans set a special focus on safe destinations, e.g. Italy and Spain
- In 2016, city trips in general have increased (+15 %)
- In general, Europeans still prefer bathing holidays, but consider visiting safe destinations for that type of holiday (+/- 0 %)

Source: FUR Reiseanalyse 2016 and 24th World Travel Monitor

Tourism development in Italy

Travel trend Italy 2016:

- Inbound - world to Europe: +2.9 %
- Inbound - world to Italy: +3 %

Travel of Europeans 2016:

- To Europe: +3 %
- To Italy: +4 %

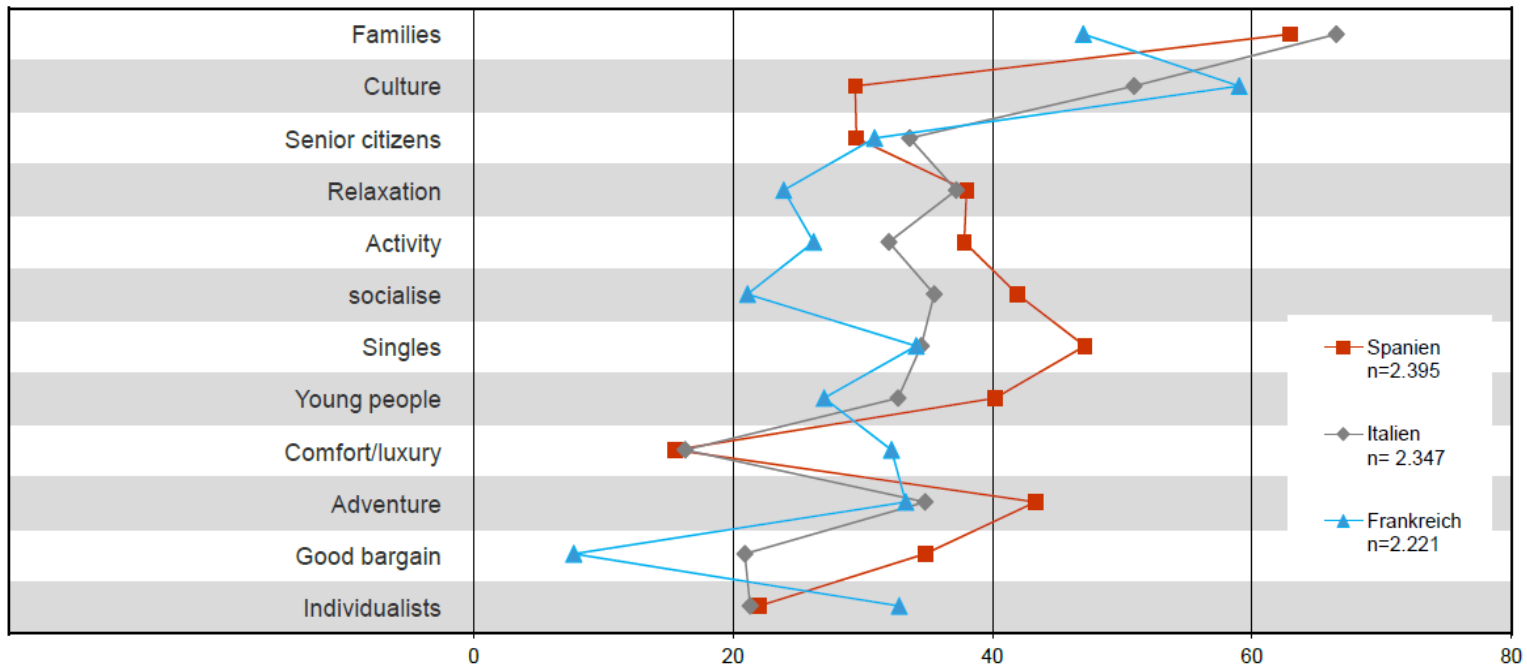


Number of Germans travelling to Italy 2015: 9 million travels

What do the destinations stand for?

German families and culture-lovers prefer Italy.

"Please tick the countries which in your view best match the relevant type of holiday-maker"



Source: ADAD Reise-Monitor, 2016. Basis: all respondents / providing information / multiple responses

Tourism development in Emilia-Romagna

Absolut numbers of tourists, between January and September 2016:

47,5 million stays in Emilia-Romagna (+1.7 %)

- Increase of national guests: 0.4 %
- Increase of international guests: 1.3 %

Ten million arrivals to Emilia-Romagna (+2.0 %)



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Internet use for travel bookings

Internet use for travel bookings

When making travel arrangements the Internet is indispensable for most Germans: nine out of ten travel bookings are researched online. The use of smartphones plays an increasingly important role.

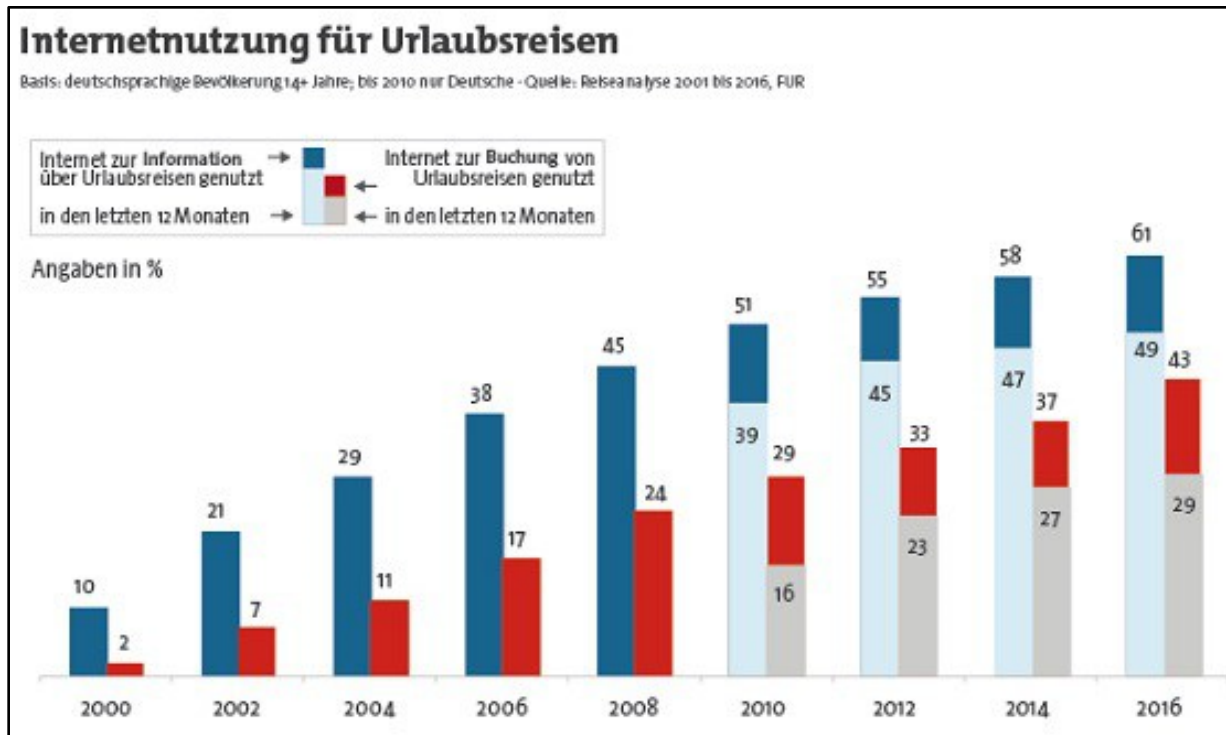
- 50 % of main vacations (fewer than five days) are booked online
- 32 % of package travel are booked online



Source: The Mobile Traveller TUI

Internet use for travel bookings

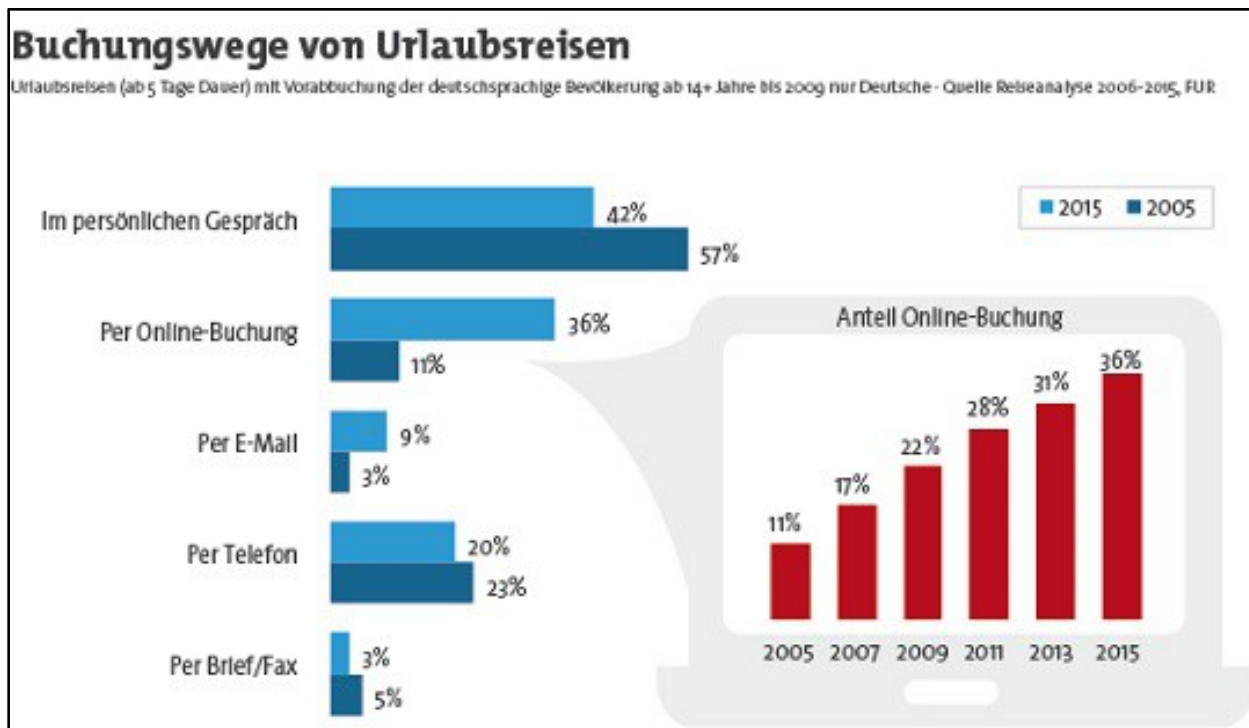
The Internet, in terms of leisure travel, is becoming increasingly important.
61 % of Germans use the Internet for travel researches (2016)
43 % of Germans have already booked a vacation online (2016)



Source: V.I.R. and FUR Reiseanalyse 2016

Internet use for travel bookings

Despite of decreases, the personal interview remains the most important booking channel for holidays. It is expected that before 2020 the majority of trips are booked via Internet or via e-mail.



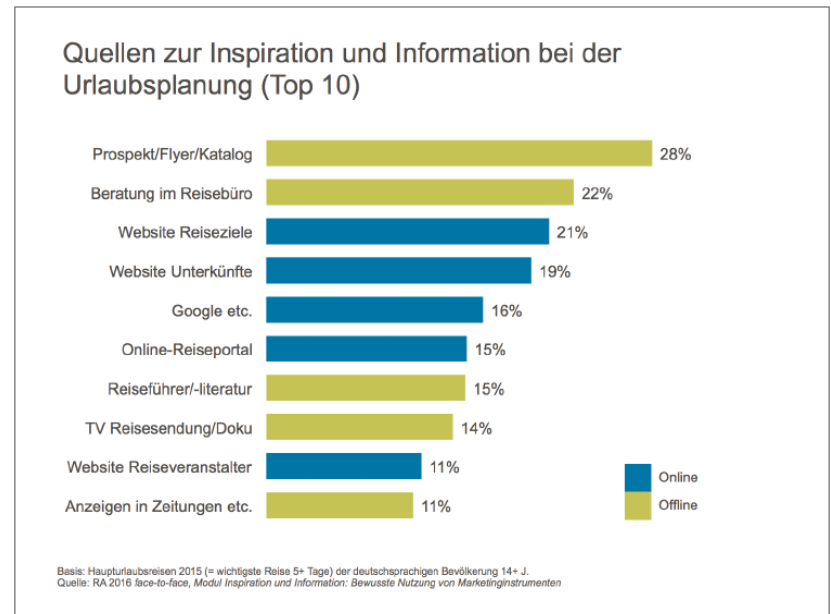
Travel booked online:

2005: 11%
2015: 36 %

Internet use for travel bookings

For inspiration and general travel information, most guests use different sources, such as flyers and other print material, personal interviews, websites, google and travel portals.

- Brochures and catalogues are the main source (28 %) for inspiration
- Personal interviews (22 %)
- Websites (21 %)



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Social media trends

Snapchat - the next big thing...

- app worth 20 billion US \$
- 200 million active users worldwide
- Snapchat is growing faster in Germany than Facebook or Instagram



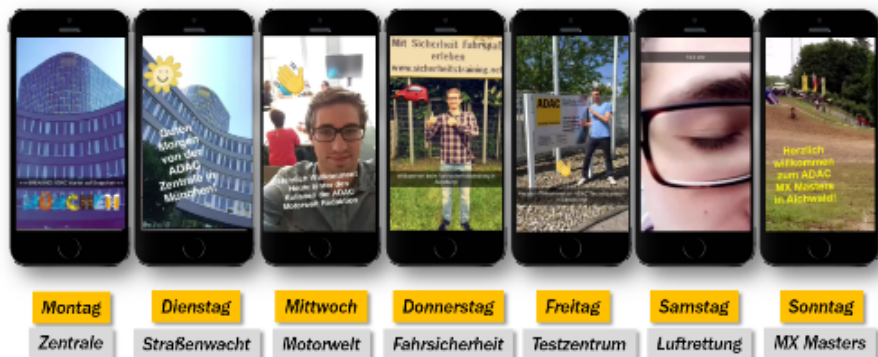
25 % of
smartphone users in
Great Britain

50 % of
smartphone users in
Norway

“only” **11 %** of
smartphone users in
USA

Snapchat - how to use for destinations

- ADAC shows impressions of its work - shows insides of a helicopter, offers interviews
- The car rental company SIXT took snapchatters behind the scenes of a photoshoot for a new car model
- Hillside Beach Club was recently looking for eight Snap Jockeys to explore the best festivals worldwide or to enjoy a stay at the Hillside Beach Club



ADAC Snapchat Content calendar



Press Release Hillside Beach Club

Viral video: Mannequin Challenge

- People remain frozen in action like mannequins while a video is recorded
- Used for popular social media platforms such as Twitter, YouTube and Instagram
- Scenes are reminiscent of science fiction films, such as X-Men: Apocalypse, The Matrix, Lost in Space or Buffalo '66
- The team including a testimonial creates a video showing spots of the region but most importantly, the video is about people - meeting the people of Emilia-Romagna.



[Video: Borussia Dortmund](#)



[Video: Hillary Clinton and John Bon Jovi](#)

Airbnb new trends

- Airbnb reported about “digital nomads” and “Bizcation”, a mixture of business trip and holiday. Sharing has gained a fixed position within business travels.
- Besides accommodation Airbnb has expanded its range of services to that of a full-scale travel agency. “Airbnb Trips” now also include tourist activities.
- Airbnb is winning market share and is turning into a significant competitor of hotels.



Influencers and bloggers

- 92 % of consumers trust recommendations from friends and family over all other forms of advertising
- 81 % of consumers trust advice from blogs
- Readers trust third-party blog posts about a company more than statements from the company itself
- Blogging is “Word of Mouth” - the most influential way of advertisement



Wilde & Partner has built up a qualified and “handpicked” database of bloggers in travel, fashion, food and lifestyle over the last years. APT could benefit from this exclusive database and could intensify its relation to relevant influencers and bloggers.

W&P recommends to do a blogger event e.g. in cooperation with Olympus (Digital Camera Company). Five bloggers take pictures and publish blog posts during their stay. Best practice: [Les Berlinettes](#)

Source: Nielsen, Research Now

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The change in the media landscape and its consequences

The change in the media landscape and its consequences

For years, media researchers have predicted the end of print media. A huge misbelief as we know today.

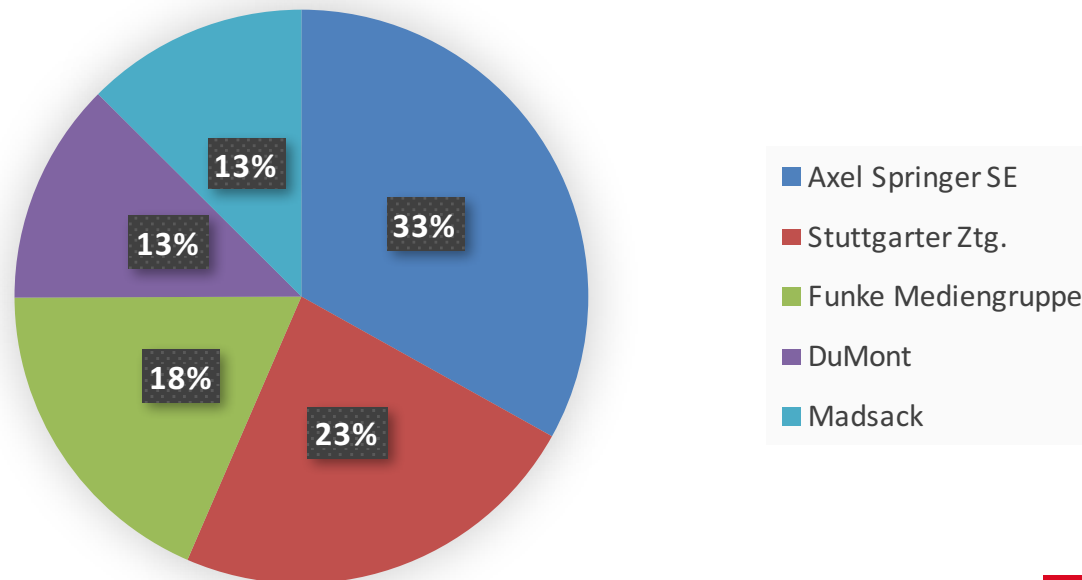
- Because of the increasing intensity of the Internet use as well as the complexity, print media is more than required in the digital age - **it gives guidance.**
- Trend: Increasing offer of print magazines with smaller circulation numbers



The change in the media landscape and its consequences

The German newspaper market is dominated by five publishing houses for newspapers. The ten largest publishers of dailies together control 59.8 % of the market.

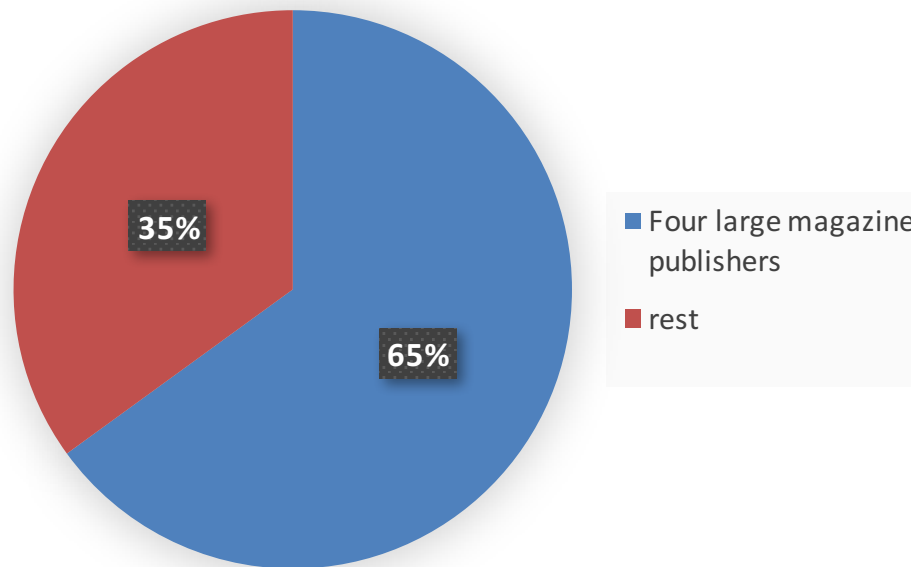
Five strongest publishing houses for newspapers



The change in the media landscape and its consequences

The four largest magazine publishers in Germany are: Bauer Verlagsgruppe, Axel Springer, Hubert Burda Media and G+J. The four largest magazine publishers cover about 65 % of the market.

Publishing houses



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