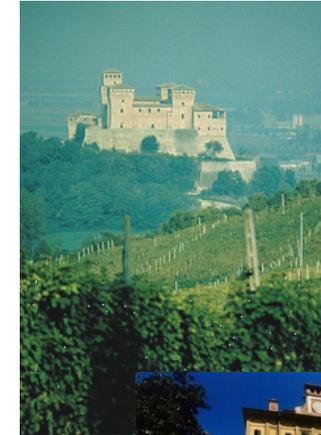


Emilia-Romagna on the German Market – News from your Potential Guests



Bologna, November 27, 2012

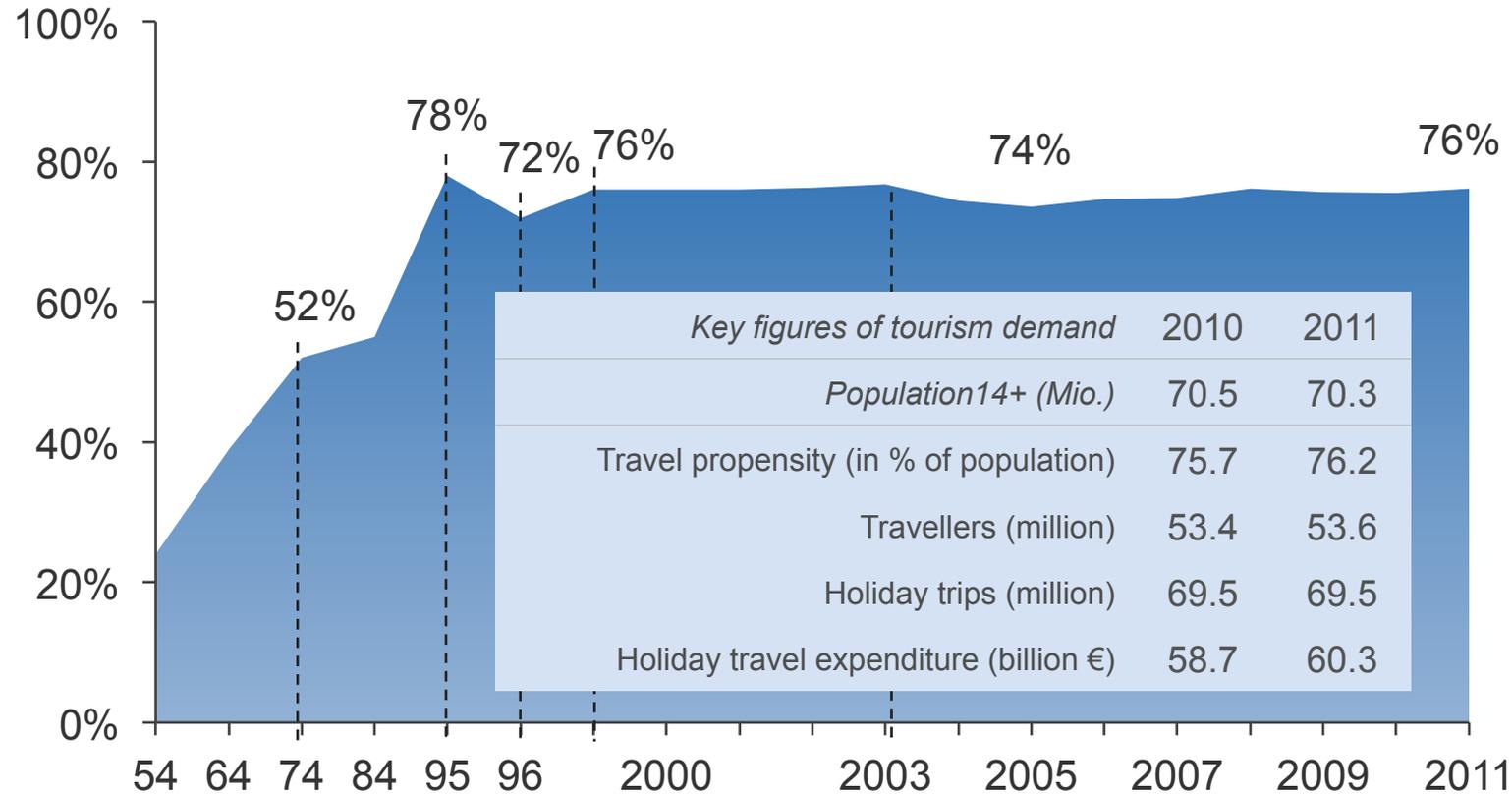
Ulf Sonntag, NIT/FUR





German Market

Holiday travel propensity (holidays = 5+ days) Stable demand on high level



Share (in % of the population), who went on at least one holiday trip (5+ days) per year
Basis: German-speaking population 14+ years; until 1990 only West Germany;
until 2009 only Germans 14+ years



69.5 million holiday trips

69% international (→)
31% domestic (→)



1. Spain (12%)
2. Italy (8%)
3. Turkey (7%)
4. Austria (5%)



1. Car (46%)
2. Airplane (37%)
3. Bus (8%)
4. Rail (6%)



12.4 days duration
(2000: 13.8 days)



Spring 18%
Summer 49%
Autumn 24%
Winter 9%



868 € spending per
person and holiday
(2000: 792 €)



43% package (↘)
32% individual (↗)
16% no booking (=)



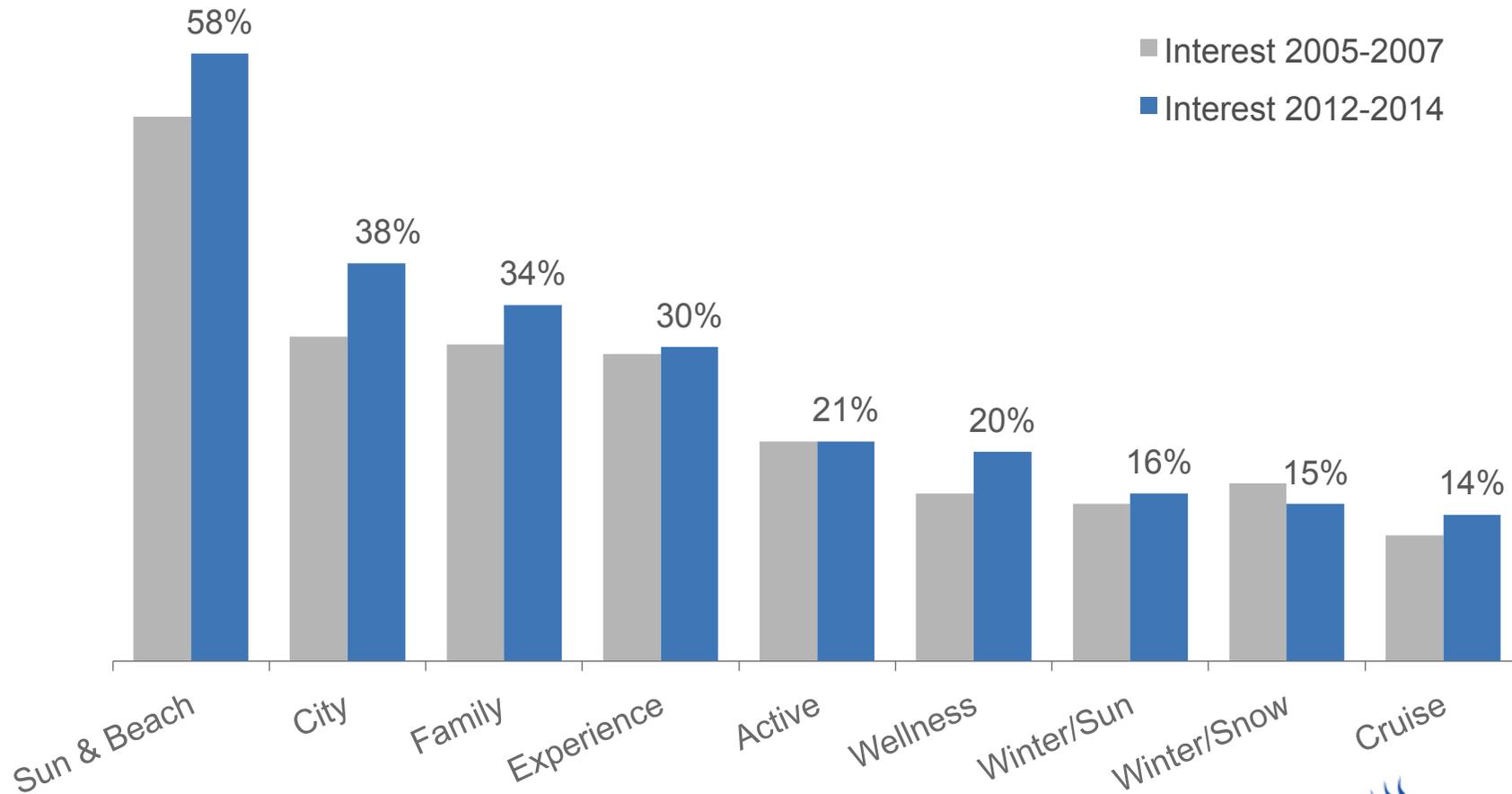
35% Travel Agent (↘)
33% Online etc. (↗)



Basis: All holiday trips (5+ days) of the German-speaking population 14+ years



Forms of holiday: Most interest in sun & beach, city and family holidays – increases for most forms of holiday



Basis: German-speaking population 14+ years; 2005 only Germans 14+ years



Italy Image and Demand



POLIZIA STRADALE
Localita' CUNEO
Indirizzo: Corso A. De Gasperi 73
Telefono: 0171 608811

Image of Italy as a holiday destination at one glance



CHARACTER

Sunny+Warm
Swimming
Scenery
Cities
Watersport
Local Food
Culture



MATCHING



NOT WELL-KNOWN

Not crowded
Cycling
Value for Money

Basis: German-speaking population 14+ years



Image of Italy as a holiday destination: Developments and Benchmarking



2002 → 2011

MINUS:
Political Situation
Safety
Local Food
Value for Money
Service

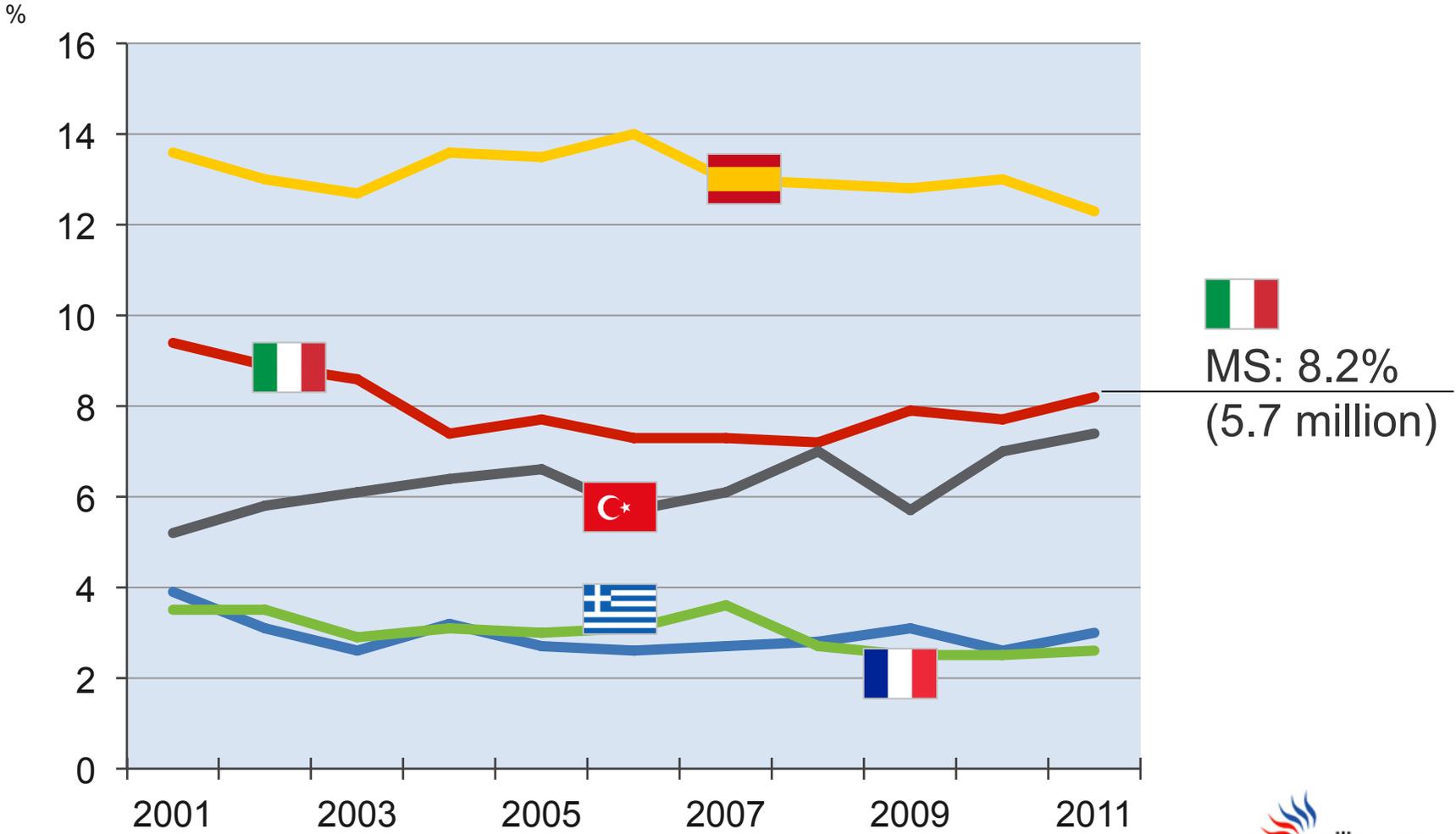


Comparison

Italy **BEST** in:
Scenery
Cities
Local Food
Culture
Accessibility
Holiday with Kids

Basis: German-speaking population 14+ years; 2002 only Germans 14+ years

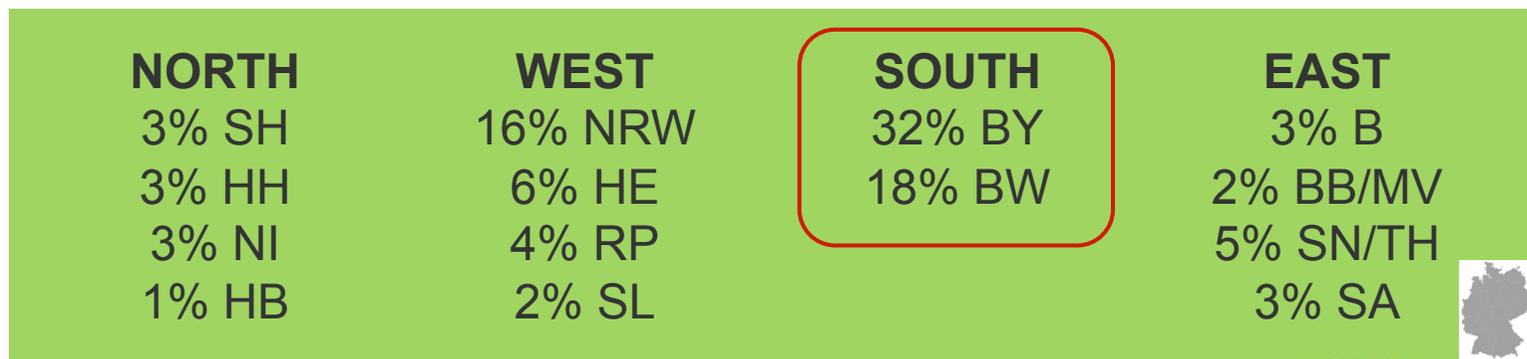
5.7 million holiday trips to Italy 2011: Upward trend since 2008



Basis: All holiday trips (5+ days) of the German-speaking population 14+ years; until 2009 only Germans



5.7 million German holiday travellers to Italy



Basis: All holiday trips (5+ days) 2011 of the German-speaking population 14+ years to Italy

Potential Guests Potential Products



18 million potential German guests to Italy (not Alps) –
Mostly “new potential”



Potential Guests to Italy (Not Alps) 2012-2014

25% (18 Mio.)

of the German population are planning almost definitely or are generally considering a holiday in Italy/Mediterranean or Italy/Rest of the Country within the next 3 years.

New Potential 66% (12 Mio.)

Interest without Experience 2009-2011

Potential Repeater 34% (6 Mio.)

Interest with Experience 2009-2011

Basis: German-speaking population 14+ years



Potential guests: Holiday motivations



BASIC:

Sun/Warmth
 Relaxation
 Freedom
 Recuperate
 Get away from daily routine
 Fun/enjoy myself

DISTINGUISHING:

Curiosity
 Culture
 Be on the move
 Company of others
 Sports
 Beauty/Wellness

MATCHING

- (Products/Scenery)
- (Art cities)
- (Great accessibility)
- (Hospitality)
- (Cycling/hiking/water)
- (Spas and hotels)



Basis: Persons interested in Italy (not Alps) 2012-2014 ("almost definitely planning" or "generally considering"), German-speaking population 14+ years

Potential guests: Holiday activities



BASIC:

Swimming
Excursions
Local Food
Shopping

DISTINGUISHING:

Sports
(*Golf, Cycling, Skiing*)
Swimming
Meeting new people

MATCHING

- Adriatic Coast:
Swimming/Sports/
Meeting new people
- Art Cities:
Excursions/Local food/
Shopping
- Apennines etc.:
Excursions/Local food/
Meeting new people



Basis: Persons interested in Italy (not Alps) 2012-2014 ("almost definitely planning" or "generally considering"), German-speaking population 14+ years

Potential guests: Types of holiday



OPPORTUNITIES:

- Sun+Beach
- Holiday home
- City
- Family
- Culture/Round/Study
- Nature
- Wellness/Health/Spa

MATCHING

- ✓
- ✓
- ✓
- ✓
- ✓
- ✓
- ✓

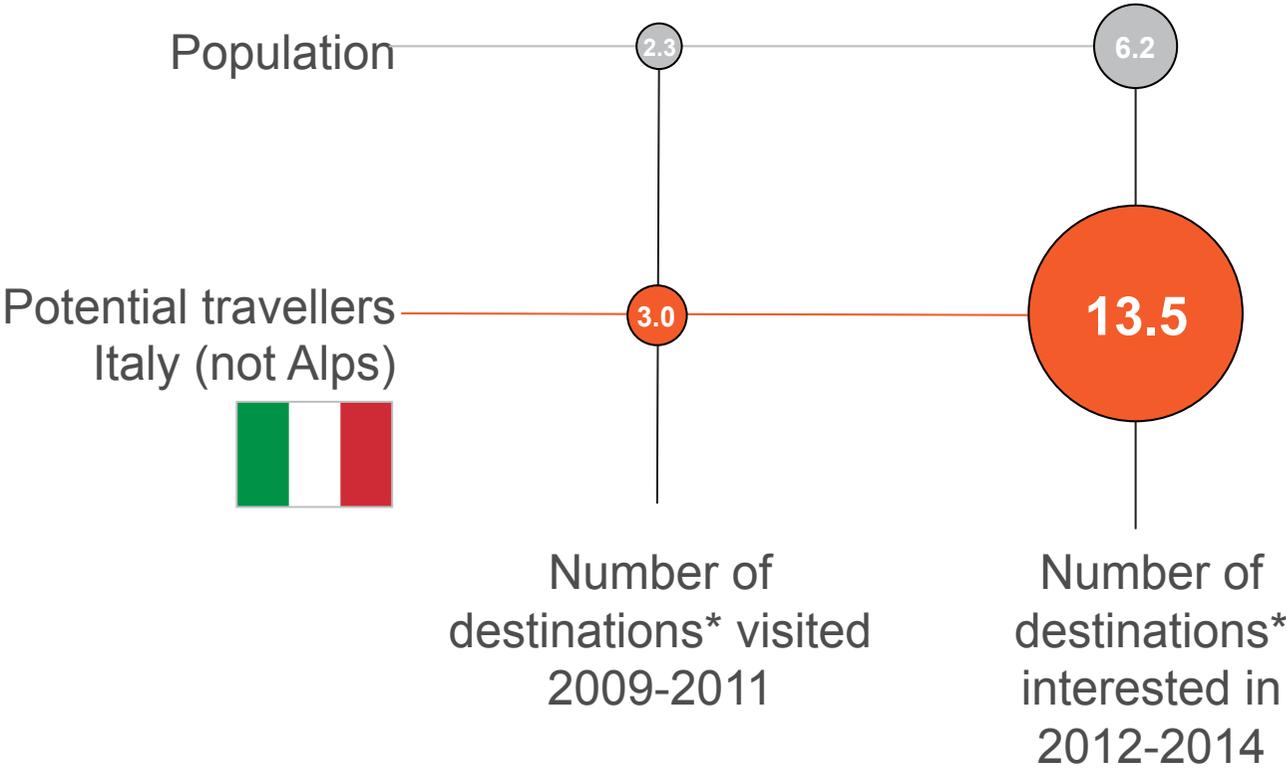
CHALLENGES:

- Winter in the sun
- Club holiday
- Cruise
- All Inclusive
- Holiday/Leisure Parks



Basis: Persons interested in Italy (not Alps) 2012-2014 ("almost definitely planning" or "generally considering"), German-speaking population 14+ years

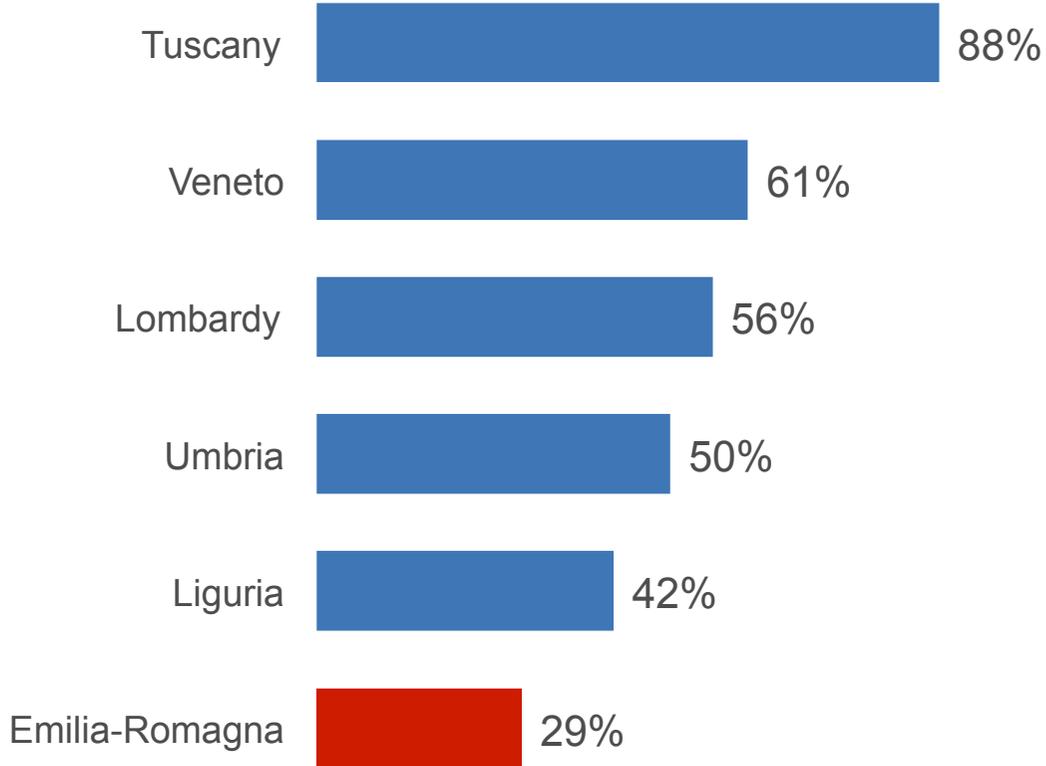
Potential guests:
 Competition with other destinations



* Out of a selection of 59 destinations worldwide
 Basis: Persons interested in Italy (not Alps) 2012-2014 ("almost definitely planning" or "generally considering"), German-speaking population 14+ years



Awareness of some Northern-Italian regions in Germany: Tuscany most, Emilia-Romagna least well known



Source: RA online 5/2012
Basis: German-speaking population 14-70 years

A photograph of three yellow directional signs stacked vertically on a green metal post. The top sign points left to 'PAST', the middle sign is 'PRESENT', and the bottom sign points right to 'FUTURE'. The background is a clear blue sky.

← PAST

PRESENT

FUTURE →

What does this mean for you? OPPORTUNITIES for Emilia-Romagna



- * You can count on the German traveller!
- * The Germans love to travel abroad!
- * Italy is one of the prime destinations for the Germans!
- * The image of Italy/Emilia-Romagna fits with its product and is in many regards „better“ than the competition!
- * 18 million potential guests for Italy (not Alps)!
- * The offer of Emilia-Romagna fits well with what the potential guests want in their holidays !



What does this mean for you? CHALLENGES for Emilia-Romagna



- * Stable market = no market driven growth!
- * Shorter holidays
- * More and fierce competition
- * No real USP for Italy/Emilia-Romagna: Image similar with other Mediterranean destinations – limited possibilities of distinction by holiday motivations/activities/forms.
- * Comparatively low awareness for Emilia-Romagna
- * Competitiveness of the Emilia-Romagna tourism product?



What does this mean for you? IDEAS for Emilia-Romagna



- * Know the wishes of your potential guests!
- * Be honest!
- * Be authentic!
- * Be creative!
- * Focus on your strengths!
- * Touch/wake up the „Italian Soul“ in each German!





Mille Grazie!

Study profile: Reiseanalyse 2012

RA 2012 *face-to-face*

Universe 70.33 million German speakers over 14 years in private households in Germany

Net sample 7,703 people from the universe

Selection method Random sample (Random route)

Data collection method Oral questioning as single study / survey which covers not only subjects directly linked to holidays, but also related subject areas

Period of data collection January/February 2012

Responsible for study FUR - Forschungsgemeinschaft Urlaub und Reisen e.V.

Field work Ipsos GmbH, Hamburg/Mölln

Scientific partner and organisation NIT - Institut für Tourismus- und Bäderforschung in Nordeuropa GmbH, Kiel

RA 2012 *online 5/2012*

Universe 60.3 million German speakers over 14 to 70 years in private households in Germany

Net sample 2,515 people from the universe

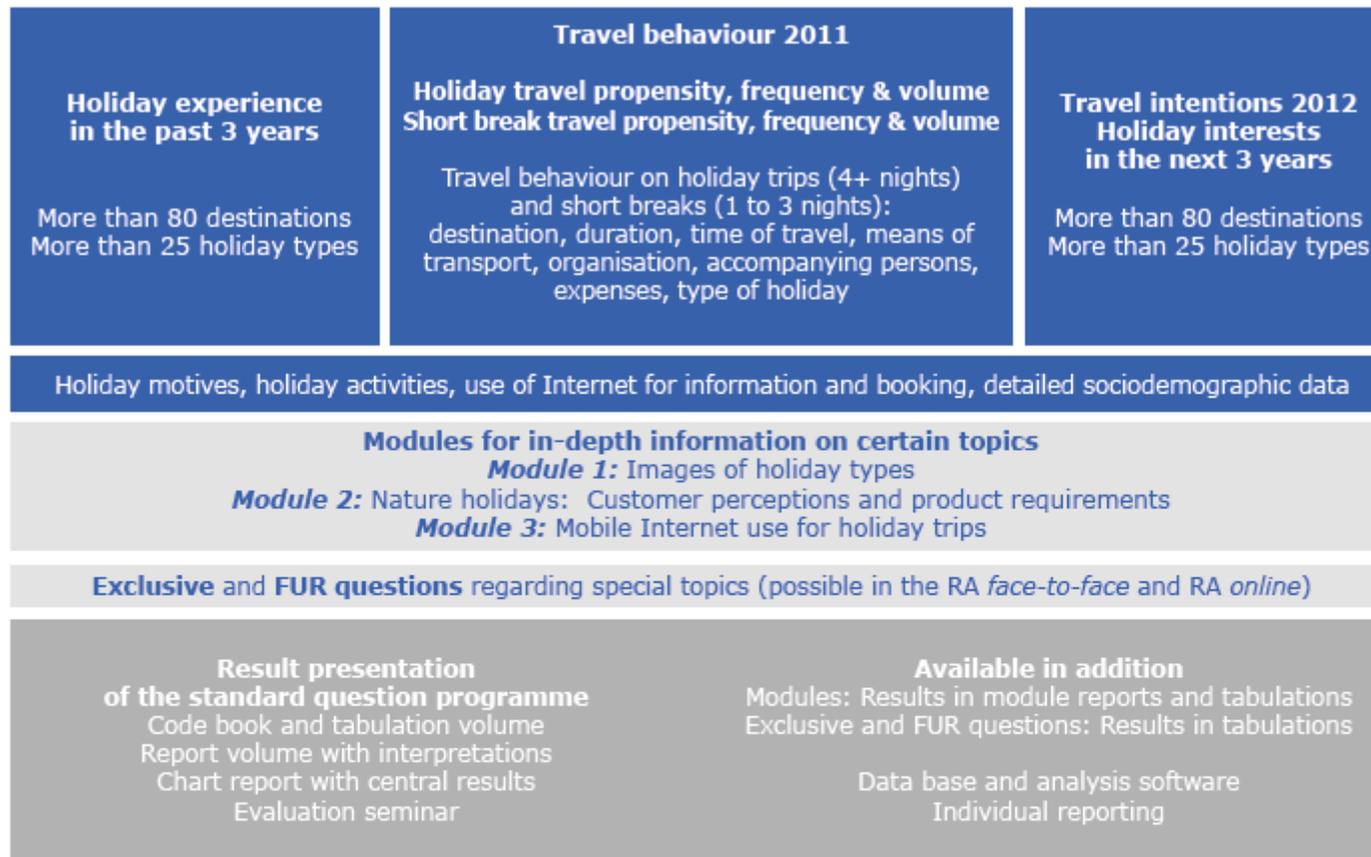
Selection method Random sample (Online Access Panel)

Data collection method Online survey as part of the Reiseanalyse 2012

Period of data collection May 2012



Reiseanalyse 2012: Modular concept



- Standard question programme**
- Basis: RA *face-to-face* and RA *online* (travel behaviour on short breaks)
 - Remains the same every year
 - For key data, long-term comparisons of more than 35 years can be made.

- Additional question programme**
- Basis: RA *face-to-face* and/or RA *online*
 - Changes every year
 - Some modules topics are repeated every few years.



Reiseanalyse 2012: further characteristics



**FUR Forschungsgemeinschaft
Urlaub und Reisen e.V.
Fleethörn 23
D-24103 Kiel
Germany**

Tel.: +49 431 88 88 800

Fax: +49 431 88 88 679

ulf.sonntag@reiseanalyse.de

www.reiseanalyse.de

- » Annually since 1972
- » Vast data basis for analysing developments and trends
- » extensive experience and methodological competence
- » Non profit: Run by tourism industry association: FUR e.V.
- » Multi client: 30 institutions share the costs (around EUR 750.000 per year)
- » User influence on RA developments
- » Very flexible: Exclusive questions and Modules fit the survey to your needs

