

WEBINAR FEDERTERME-ICE-ENIT

6th November 2020

PRESENTATION GERMAN MARKET

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with Csilla Mezösi

Secretary General ESPA European Spas Association

as Special Guest



Thermen und Wellness in Italien



Italiens großes Thermen- und Wellness-Angebot zeigt sich äußerst vielfältig. Von den Dolomiten bis zum Ätna finden Erholungssuchende Thermalorte in Italien. Überall sprudeln und dampfen heilende Quellen, die Italien zu einem wahren Thermal- und Wellness-Paradies machen. Bereits in der Antike wussten die Römer die wohltuende Wirkung der Thermal- und Heilwasser zu schätzen. Zu den Anwendungen in den verschiedenen Thermalorten zählen Thermalbäder, Fango, Dampfbäder, Inhalation in naturbelassenen Grotten, Trinkkuren und Heubäder, die Italien als Kur- und Wellness-Destination so attraktiv machen.

Das abwechslungsreiche Thermalangebot steht für unterschiedlichste Behandlungsmöglichkeiten und verspricht Linderung bei zahlreichen Leiden und Krankheitsbildern. Darüber hinaus entwickelten sich zahlreiche Thermalorte in den vergangenen Jahren zunehmend zu wahren Wellness-Oasen, in denen hoch qualifiziertes Personal und moderne Einrichtungen auf gesundheitsorientierte Gäste warten. In unserer stressgeplagten Zeit gewinnen Begriffe wie Wohlbefinden, Fitness, Vitalität sowie Harmonie von Körper und Geist immer mehr an Bedeutung.



Vor diesem Hintergrund verwundert es kaum, dass immer mehr Urlauber die Wohlfühl-, Relax- und Wellness-Angebote unserer Urlaubsdestination nutzen. Denn gerade in Italien bilden Thermen, Wellnessprogramme, sanfte Landschaftsbilder, mildes Klima, die leichte mediterrane Küche, südliche Lebensfreude sowie ein reiches Kunst- und Kulturangebot geradezu eine ansprechende Symbiose für Erholungssuchende. Viele Kurzentren erfreuen sich in



Menu



Sie sind in [Home](#) / [Reisetipps](#) / Sport und Wellness

Sport und Wellness



Mountainbiken



Windsurfen am Comersee

THE GERMAN TOURISTS IN ITALY...

Germany is the first source market for Italian tourism with 58.7 million nights (+0.1% vs 2018).

- Preferred Italian regions:
 - Trentino Alto Adige, 19 million nights, i.e. 32.6% of total
 - Veneto, 16 million nights, i.e. 27.4% of total
 - Lombardia, 5.2 million nights, i.e. 8.8% of totalThese regions together make 69% of total.
- Preferred accommodation:
 - Hotel, 53.6% of the total (31.5 million nights in 2019 from Germany, i.e. -1.8% vs 2018).
 - The segment „extra alberghiero“ makes 46.4% of the total nights (27.2 million, i.e. +2.4% vs 2018).



...AND THEIR SPENDING

German tourists have spent in Italy 7.6 billion Euro in 2019 (+7.4% vs. 2018).

This is 17.2% of the total international spending of 44.3 billion Euro.

- Spending received by regions:

1° VENETO ca € 1.5 billion (+4.8% vs 2018)	2° LOMBARDIA € 1.2 billion (+18% vs 2018)	3° TAA € 945 million (+10.7% vs 2018)
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- Spending for different types of holiday:

SEASIDE 30% of total € 2,3 billion Euro (+2% vs 2018)	CULTURE, ART CITIES 21% of the total € 1.6 billion Euro (ca +0.9% vs 2018)	LAKE 10% of total 762 million Euro (+14.7% vs 2018)
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INT. HEALTH TOURISM IN ITALY 2019

Spending, Travellers and Overights var. % 2018



WHERE DOES THE MONEY COME FROM?

International spending for health and thermal treatments in million Euro TOP 10 countries		
Country	2019	%
Austria	95.3	53.5
Germany	29.2	16.4
Principality of Monaco	11.6	6.5
Switzerland	9.0	5.1
France	8.8	4.9
UK	8.0	4.5
Ireland	5.3	3.0
Belgium	2.7	1.5
Romania	2.6	1.5
Luxemburg	1.1	0.6
Total	178.0	100



WHERE DOES THE MONEY GO TO?

International spending for health and thermal treatments in million €		
Region	2019	%
Veneto	92.3	51.9
Lombardia	38.5	21.6
Trentino Alto Adige	20.2	11.4
Friuli Venezia Giulia	8.2	4.6
Emilia Romagna	3.2	1.8
Sardegna	3.1	1.7
Toscana	2.6	1.5
Valle d'Aosta	2.2	1.2
Piemonte	2.0	1.1
Liguria	1.9	1.1
Campania	1.1	0.6
Lazio	0.8	0.5
Sicilia	0.8	0.4
Puglia	0.6	0.4
Calabria	0.3	0.2
Marche	0.2	0.1
Totale	178.0	100

TOP SPOTS FOR GERMAN HEALTH TOURISTS

Italy, Territory of Wellness and Beauty *Italien, das Wohlfühliland*

The German tourists have since years their preferred thermal and health places in Italy. Throughout the country, from north to south, it is possible for visitors to experience a unique vacation centered on physical and mental well-being at numerous natural thermal springs and baths. The best known are:

- Ischia
- Abano
- Colli Euganei
- Montegrotto
- Saturnia

but also spa resorts in Umbria, Emilia Romagna, Trentino and many others.



1) THE HEALTH TOURISM IN GERMANY

- 350 „*prädikatisierte Heilbäder und Kurorte*“ (certified thermal sites): particularly apt to cure problems of the locomotor system and respiratory diseases
- Wide offer including prevention and physical rehab, relax, wellness, sports and recreational activities
- ca 400k jobs and over 30 billion Euro sales



THE ROLE OF THE HEALTH INSURANCES IS COMPLEX

The health insurances (*Krankenkassen*) have a complex role in prescribing and reimbursing treatments:

- After the reform packages in the 90ies it is very difficult to get treatments reimbursed
- A lot of „normal holidays“ are simply integrated with some wellness/health treatments, as well as sport activities
- Some companies offer fringe benefits linked to health and well-being experiences.

2) THE WELLNESS TOURISM IN GERMANY

- Wellness is a very appreciated „niche product “ in a growth trend
- Motivation: personal growth, stress reduction, natural cures, healthy food
- Health and wellness are status symbols
- Wellness + culture + nature
- New target groups like families and generation Y



WELLNESS TRENDS 2021

- The trends 2021 will probably be:

1. losing weight, detox and fasting
2. strengthening the immune system, also via healthy food
3. active holiday and fitness (especially pilates, walking/nordic walking, trekking)
4. bio-hotels, sustainability
5. Ayurveda
6. luxury, beauty, romantic and green holiday



THE WELLNESS TOURISM IN GERMANY

- For 80% of the guests the most important aspect of a wellness stay is relax —→ relax means different things for different people:
 - 30% of men „relax“ by exercising/ doing sports
 - 50% of women „relax“ reading
 - The young target group < 29 years is particularly interested in:
 - sports and sleep
 - healthy food and 30% would like to have cooking lessons and seminars on nutrition
- whereas „golden ager“ prefer walking and reading*

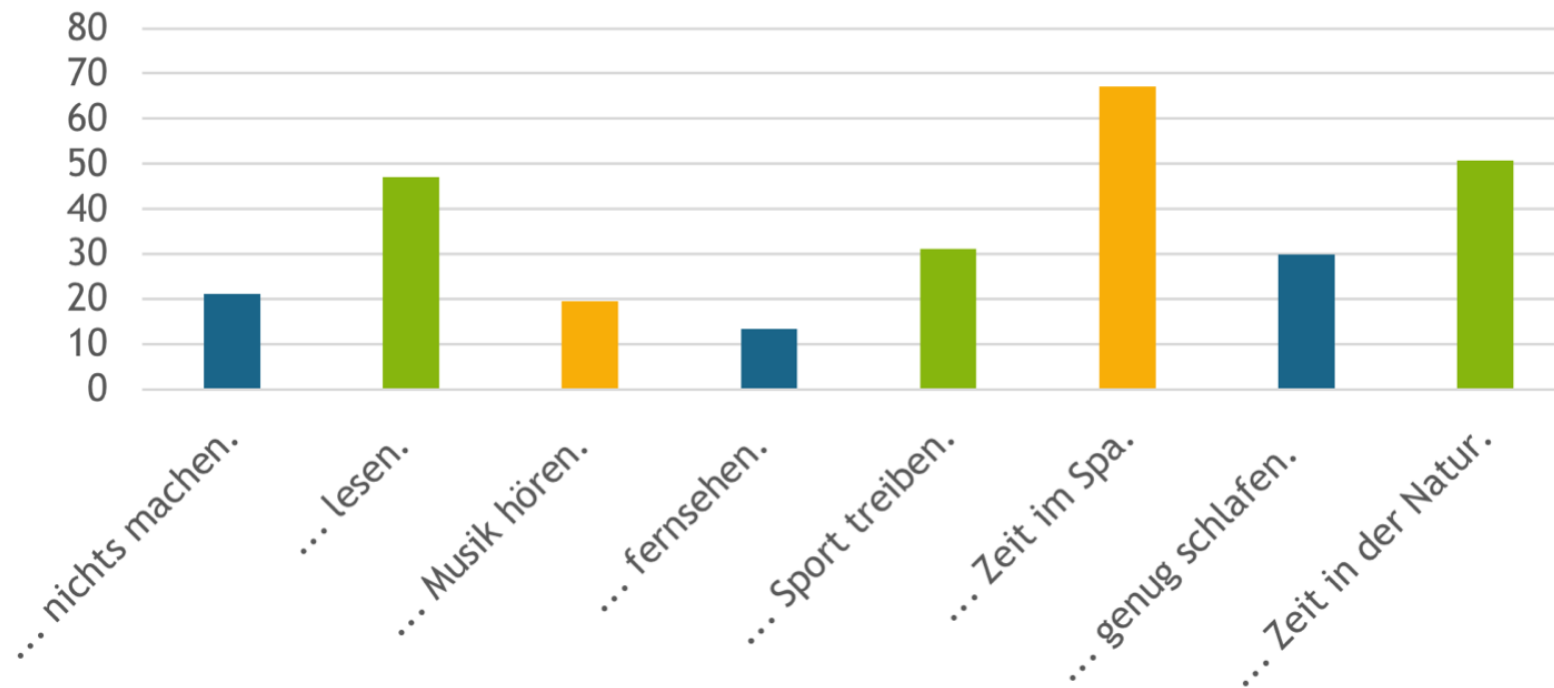


THE WELLNESS TOURISM IN GERMANY

Entspannung unbedingt!

SPA MEANS RELAX

Ich entspanne am besten durch...



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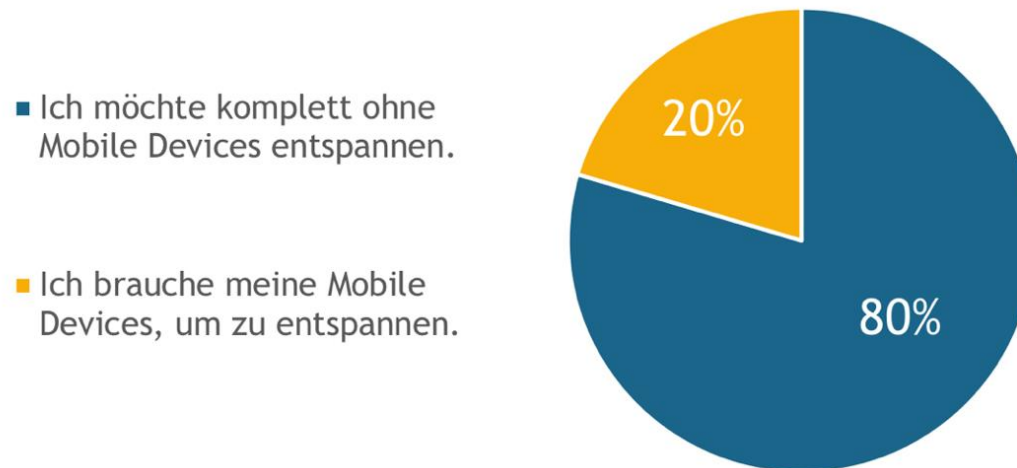


THE WELLNESS TOURISM IN GERMANY

DETOX ALSO MEANS DIGITAL DETOX

Digital Detox gehört zu Wellness

Welche Rolle spielen digitale Geräte in Ihren Entspannungsphasen?



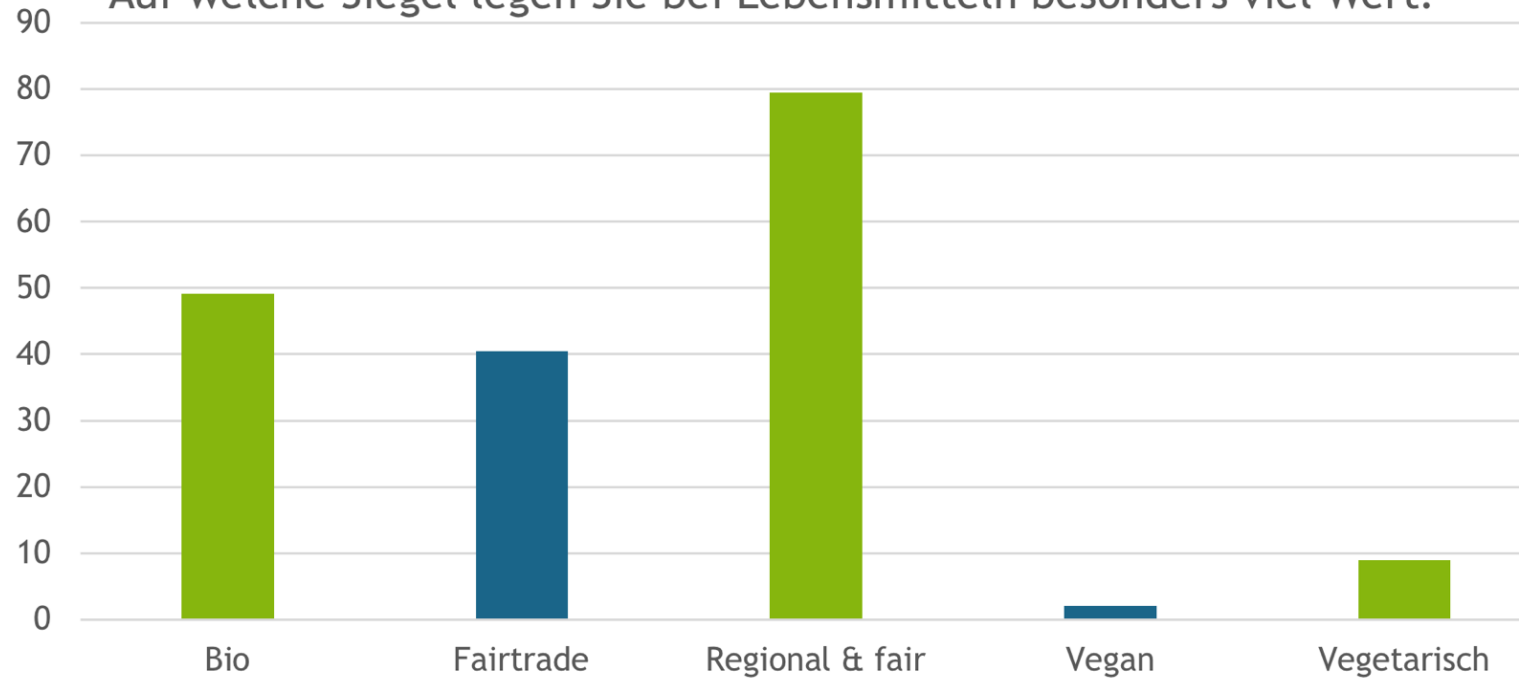
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THE WELLNESS TOURISM IN GERMANY

REGIONAL PRODUCTS OF HIGH QUALITY ARE IMPORTANT

Wellness-Gäste achten auf Siegel

Auf welche Siegel legen Sie bei Lebensmitteln besonders viel Wert?



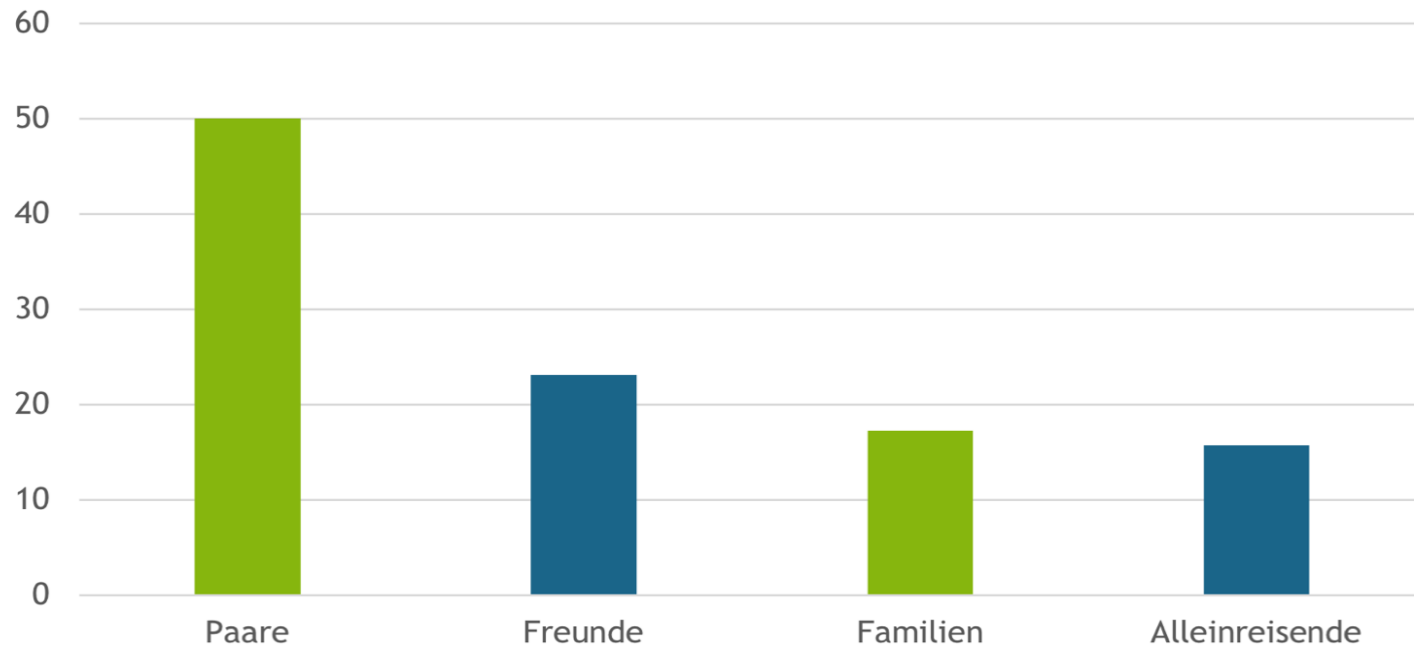
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THE WELLNESS TOURISM IN GERMANY

THE TYPICAL GUEST IS THE **COUPLE**, BUT THE SHARE OF **FAMILIES** IS
GROWING (17.3% in 2019, i.e +4% vs. 2018)

Gästeanteil 2019 in %
Welchen Gästeanteil stellten 2019 die folgenden Personengruppen in Ihrem
Wellnesshotel? (Gesamt 100%)

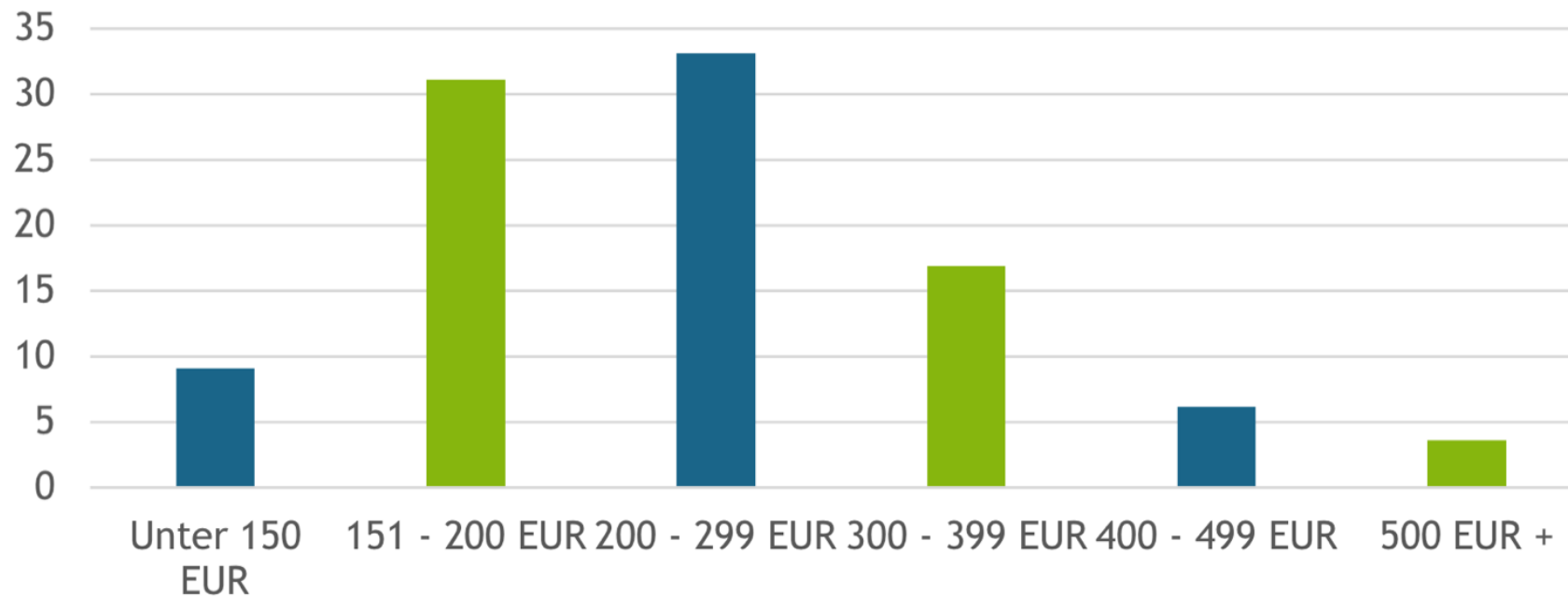


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THE WELLNESS TOURISM IN GERMANY

GUESTS WILLING TO SPEND MORE FOR HIGHER QUALITY

Was wären Sie pro Person bereit für ein Beispiel-Wochenende zu bezahlen?



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Info: Gefragt wurde nach einem Wochenende mit 2 Übernachtungen inkl. Frühstück und Abendessen sowie einer Anwendung pro Person à 30 Min. und die freie Nutzung des gesamten Spa-Bereichs. Die Preise sind pro Person.

WEBINAR FEDERTERME ICE ENIT

6th November 2020

THANK YOU!

For any query please contact the
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