



TOURISM MARKET *MALAYSIA & SINGAPORE* *ITALIA*

A cura di

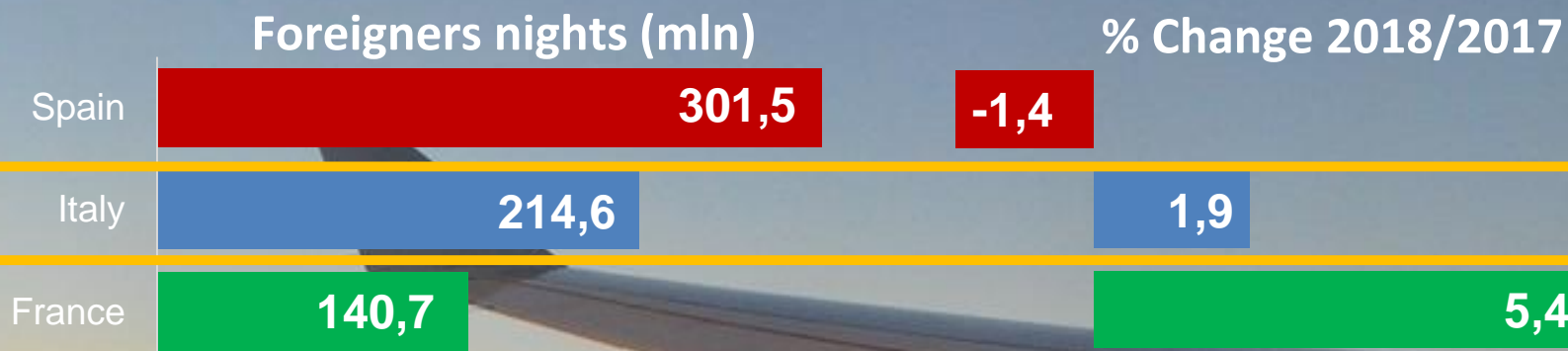
ENIT – Agenzia Nazionale del Turismo

An aerial photograph of Lake Garda, Italy. In the foreground, a large stone castle with multiple towers and battlements sits on a small peninsula. To the left of the castle is a small town with colorful buildings and a parking lot. The lake is a vibrant turquoise color, and a speedboat is visible in the lower left, leaving a white wake. In the background, the lake stretches towards distant hills under a clear sky.

INTRO *ITALIA*

ITALIA

In 2018 Italy surpasses France in foreigners tourism overnights, growing vs Spain



International Airport Arrivals

2018

121 mln pax: **+7,2% on 2017**

From UE: 93 mln pax: **+5,6% on 2017**

RESERVATION FIRST SEMESTER 2019

Italy vs France and Spain



+2,8% on 2018



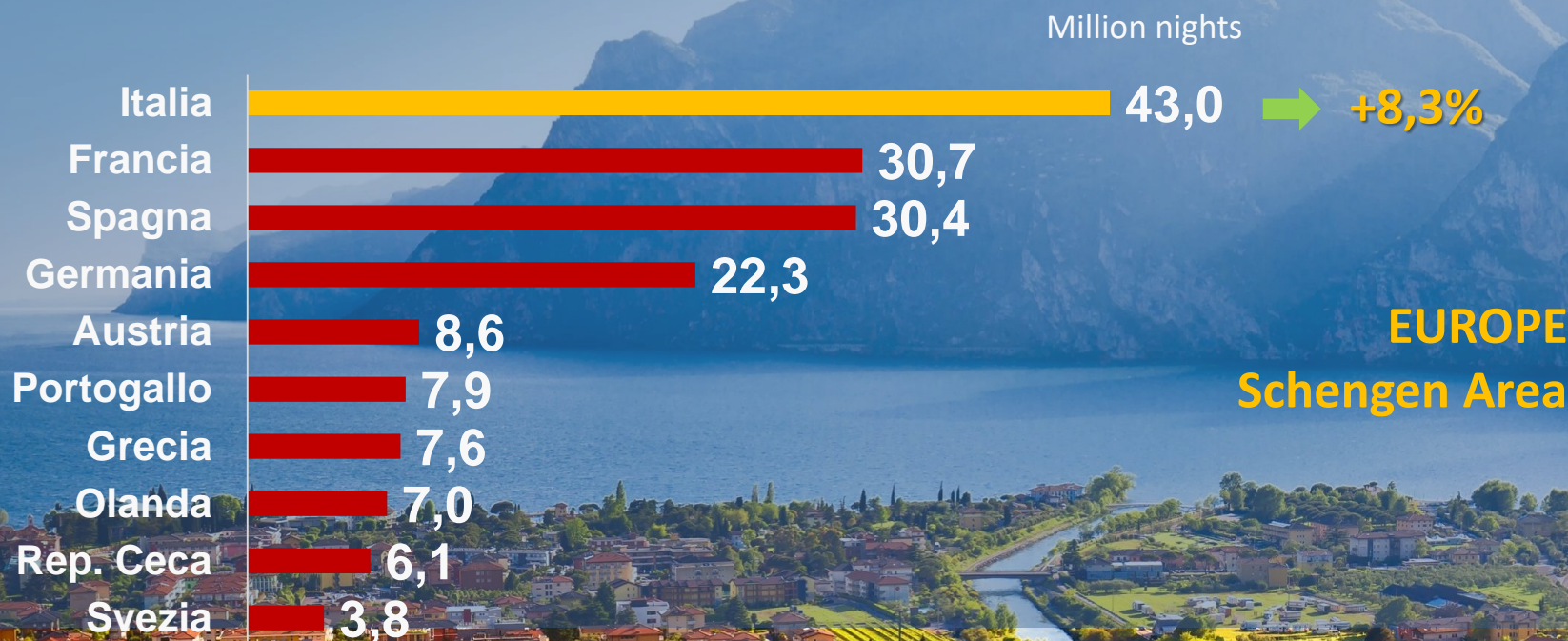
+2,8% on 2018



-7,6% on 2018

ITALIA

23,5% of nights from ExtraUe's tourists are spent in Italy



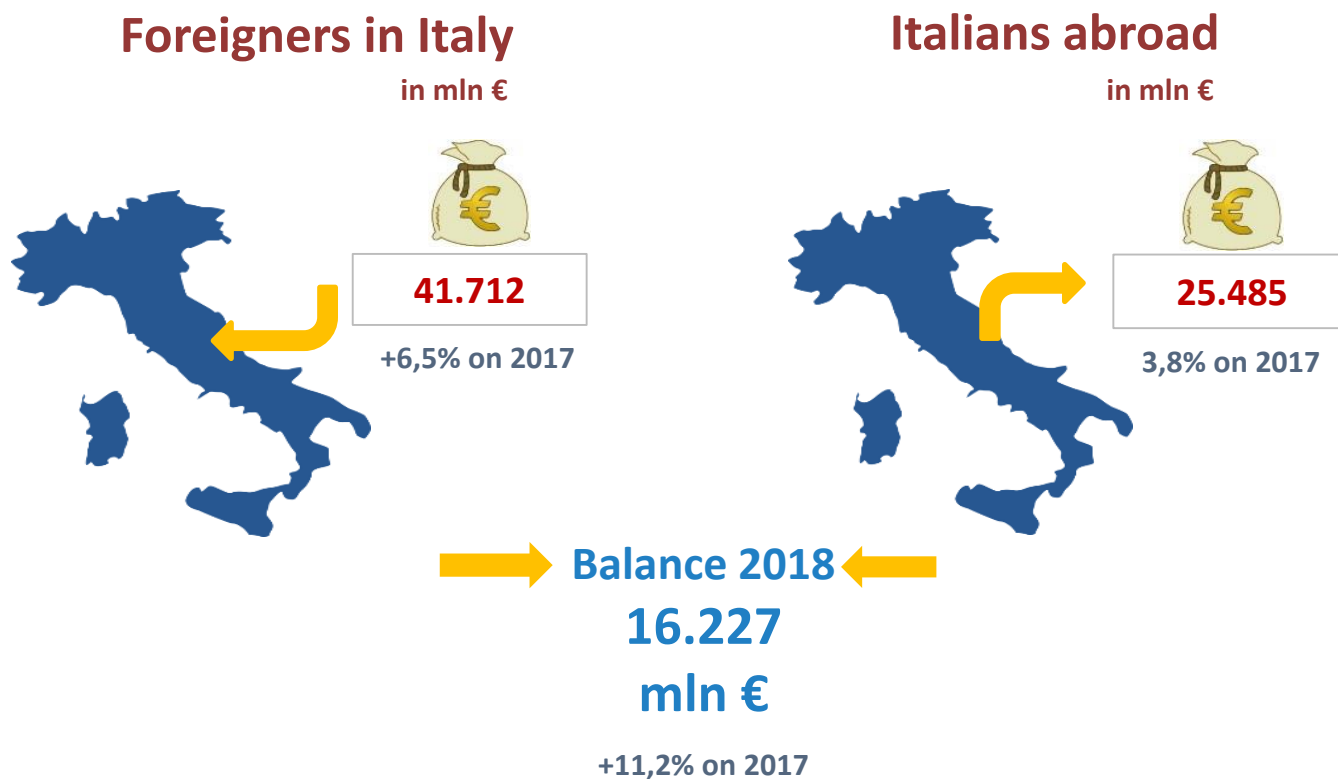
Tourism flows in Italy 2018

Market	Nights	Change % 18/17
International	216.152.719	+2,6
Domestic	212.099.048	+1,0
Total	428.251.767	+1,8

Rate %



Tourism Expenditure in 2018

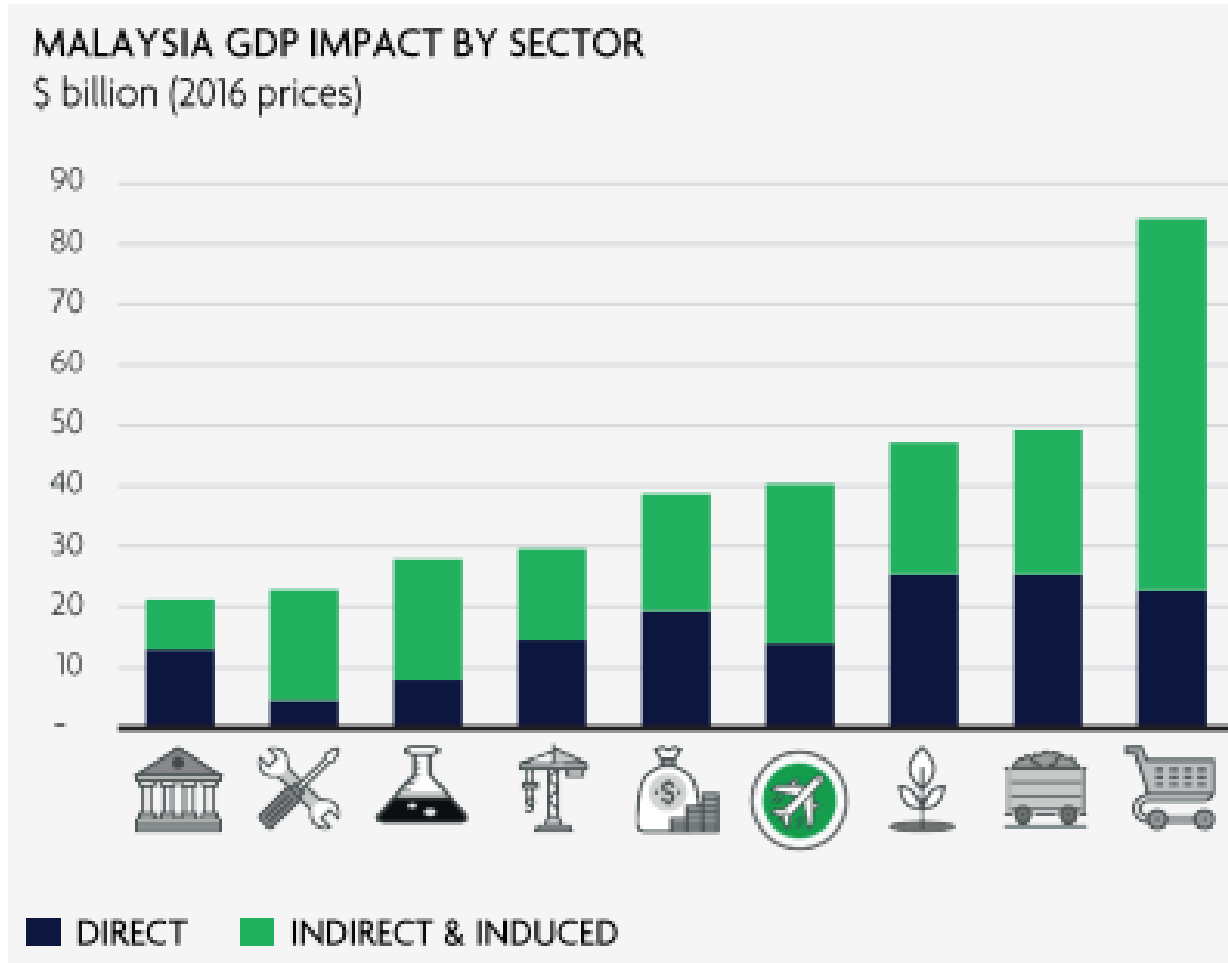


A nighttime photograph of the Kuala Lumpur skyline. The Petronas Twin Towers are the central focus, illuminated with blue and white lights. They are connected by a skybridge. Below them, the lower section of the towers is brightly lit with warm orange and yellow lights. Surrounding the towers are various other skyscrapers and buildings, some with lights on, others in shadow. The sky is a deep blue with some light clouds. The overall scene is a vibrant urban nightscape.

FOCUS MALAYSIA

ITALIA

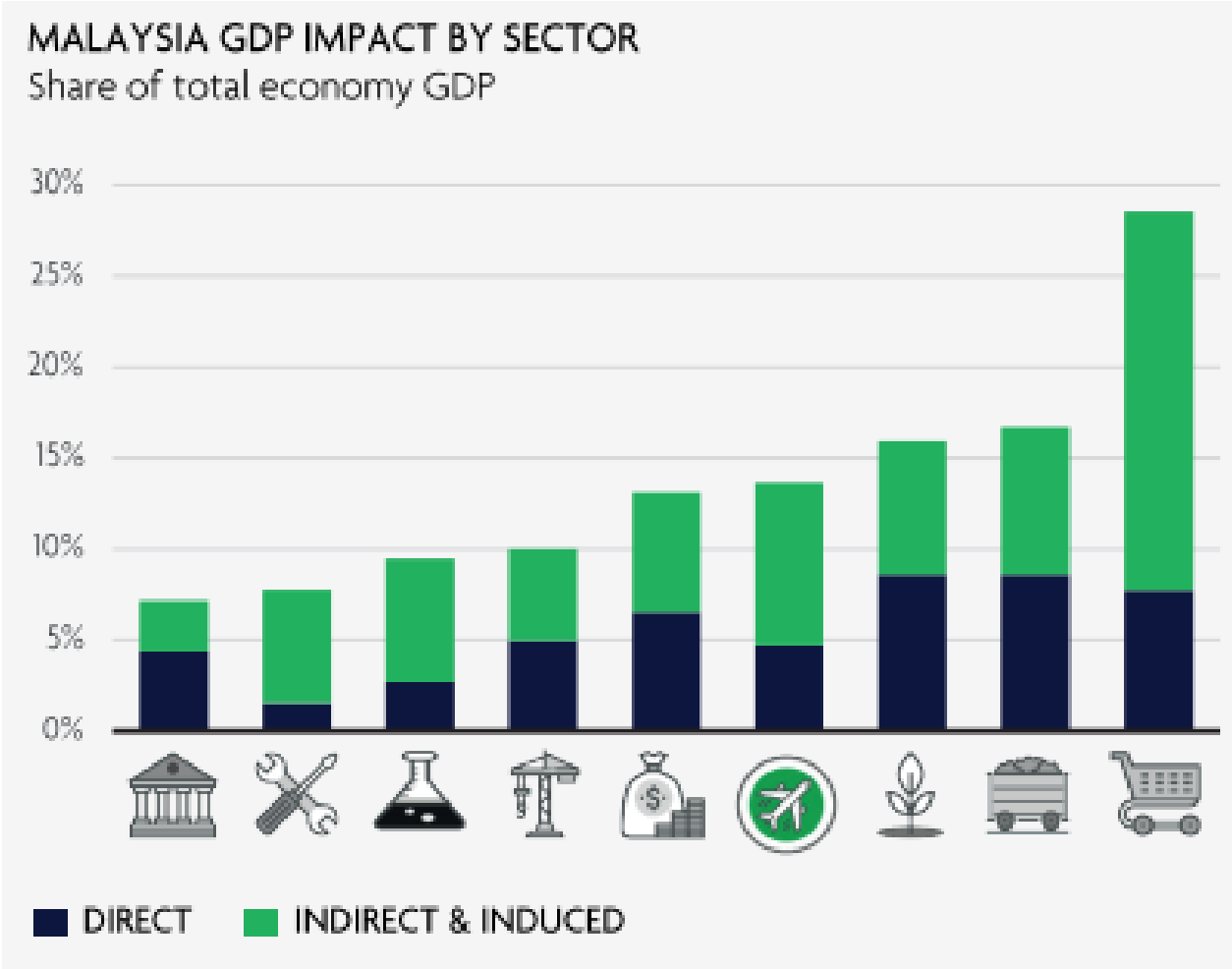
MALAYSIAN TOURISM GDP



40
BILLION
of Tourism
GDP
(2016
prices)



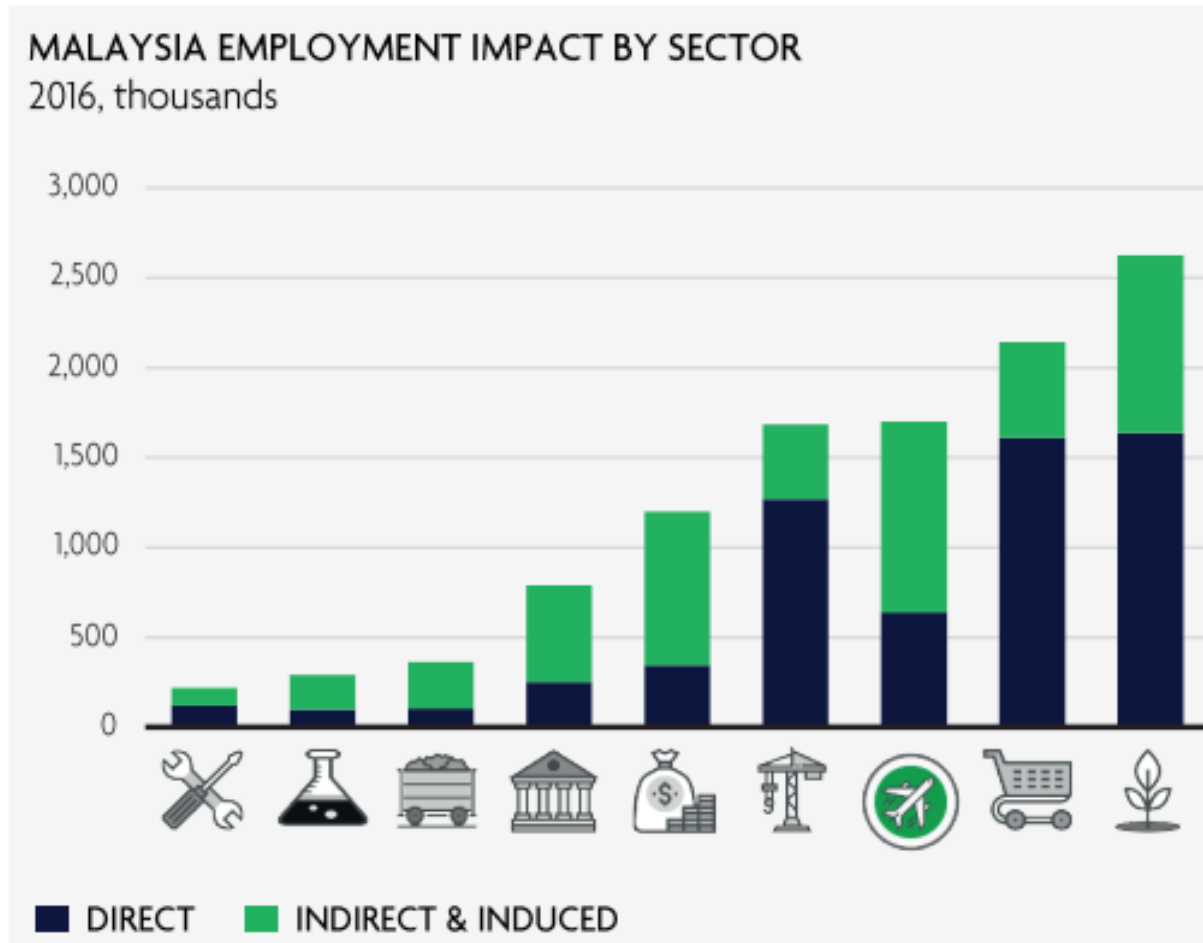
MALAYSIAN TOURISM GDP (%)



Tourism
GDP
13,7% of
Total
economy
GDP

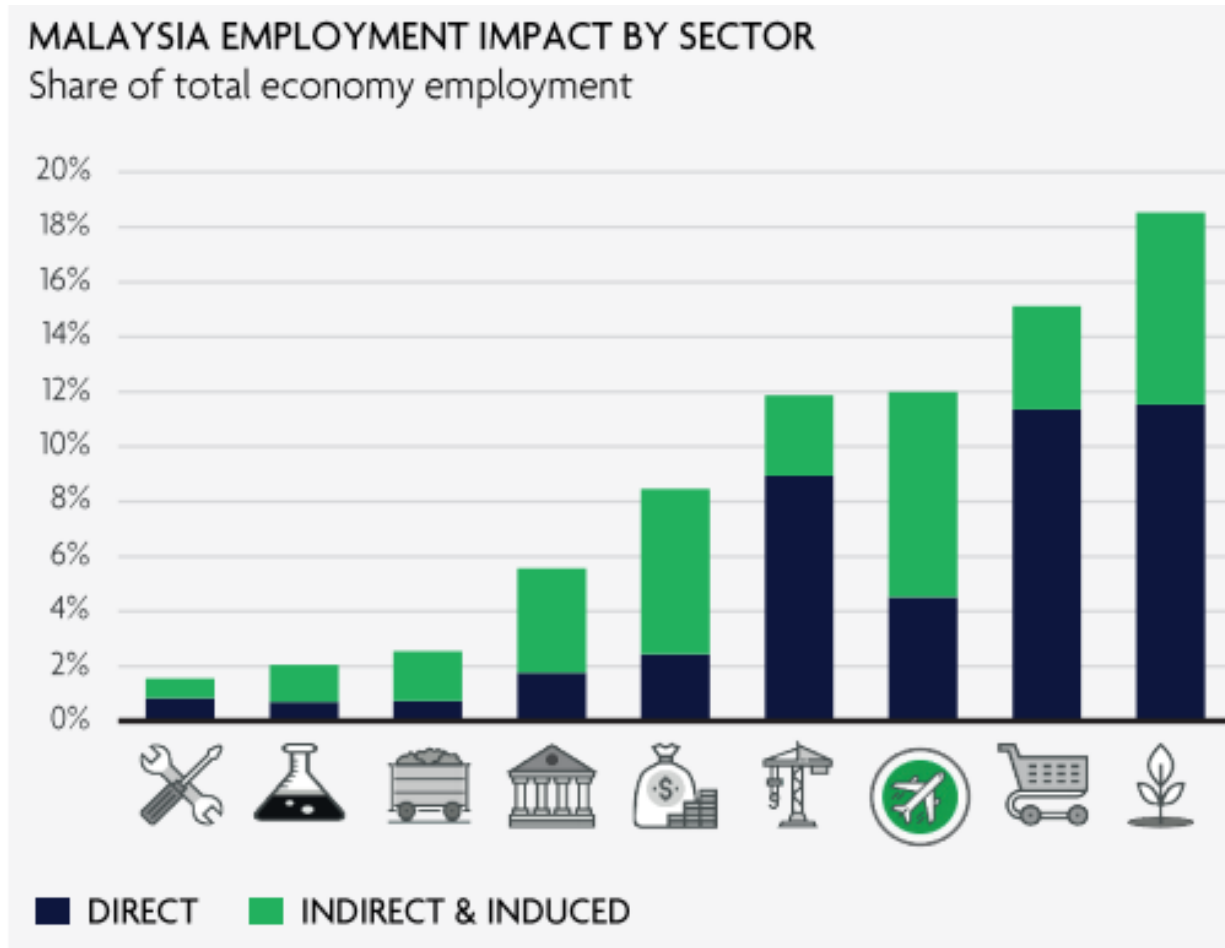


MALAYSIAN TOURISM EMPLOYMENT IMPACT



Tourism
employment
sustained
1,7 million
jobs

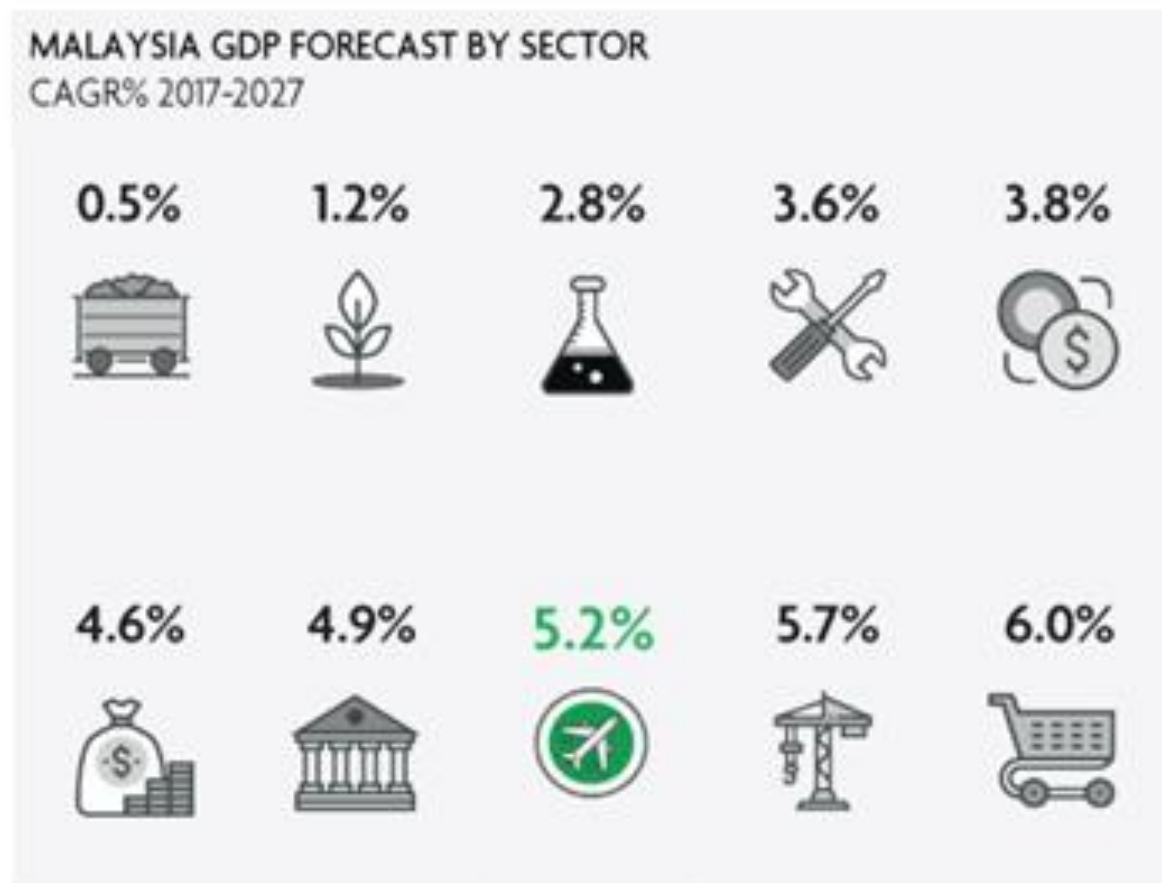
MALAYSIAN TOURISM EMPLOYMENT IMPACT



Tourism
generated
12% of
employment
in Malaysia



MALAYSIAN TOURISM FUTURE TRENDS



Tourism
GDP is
expected to
grow with an
annual
average of
5,2%

MALYSIAN TOURISM INTERNATIONAL EXPENDITURE (US\$ Million)

	2016	2017	Change % 2017/ 2016
Outgoing Travel Expenditure	10.472	10.699	2,2

ITALIA

ITALY IS 7° IN TOP 10 MALAYSIAN DESTINATIONS

MALAYSIANS VISITORS FOR COUNTRY OF DESTINATION

	2016	2017	% Change 2017-2016
Thailand	3.494.890	3.494.488	-0,01
Saudi Arabia	361.120	342.971	-5,03
India	301.961	322.126	6,68
Turkey	48.456	60.859	25,60
Brunei Darussalam	54.374	60.030	10,40
Myanmar	43.931	47.010	7,01
Italy	19.230	39.714	106,52
Sri Lanka	23.747	24.982	5,20
Maldives	16.185	19.092	17,96
Nepal	13.669	18.284	33,76

ITALIA

MALAYSIAN TOURISM IN ITALY

	TOURISM EXPENDITURE IN ITALY (Euros)	TOURISM NIGHTS	TOURISM TRAVELLERS
MALAYSIA	53.109.514,54	253.684	45.476
Change % 2017/2016	+115,2	+158,7	+12,3

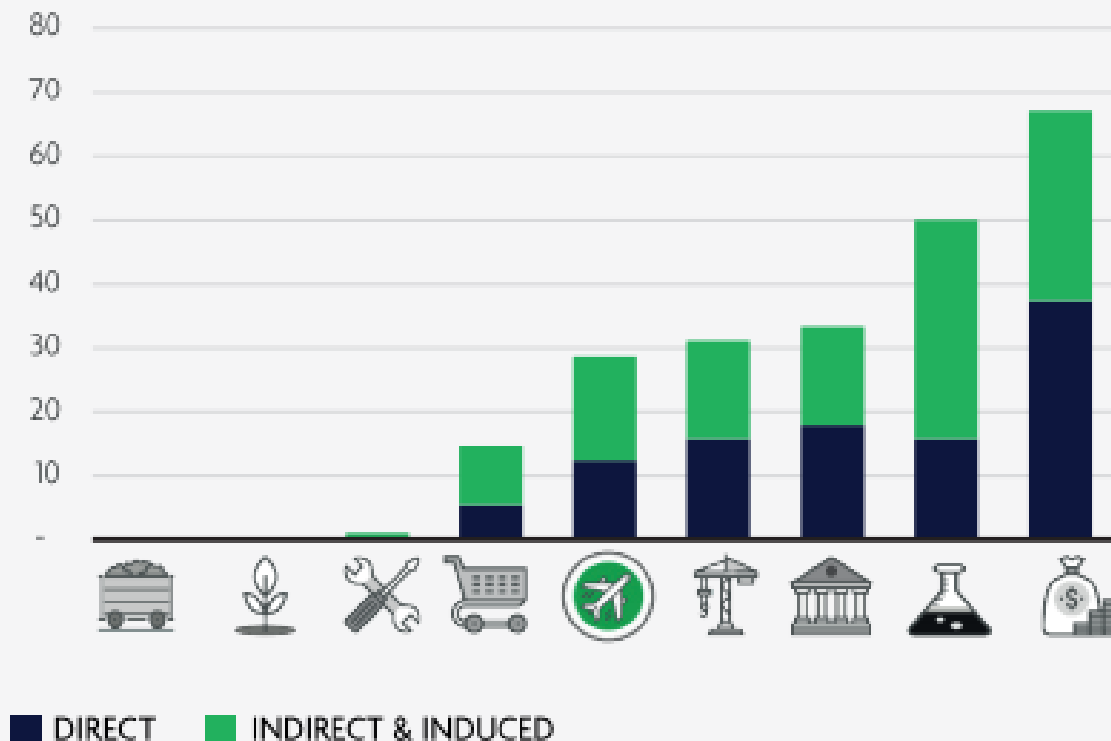
FOCUS SINGAPORE



ITALIA

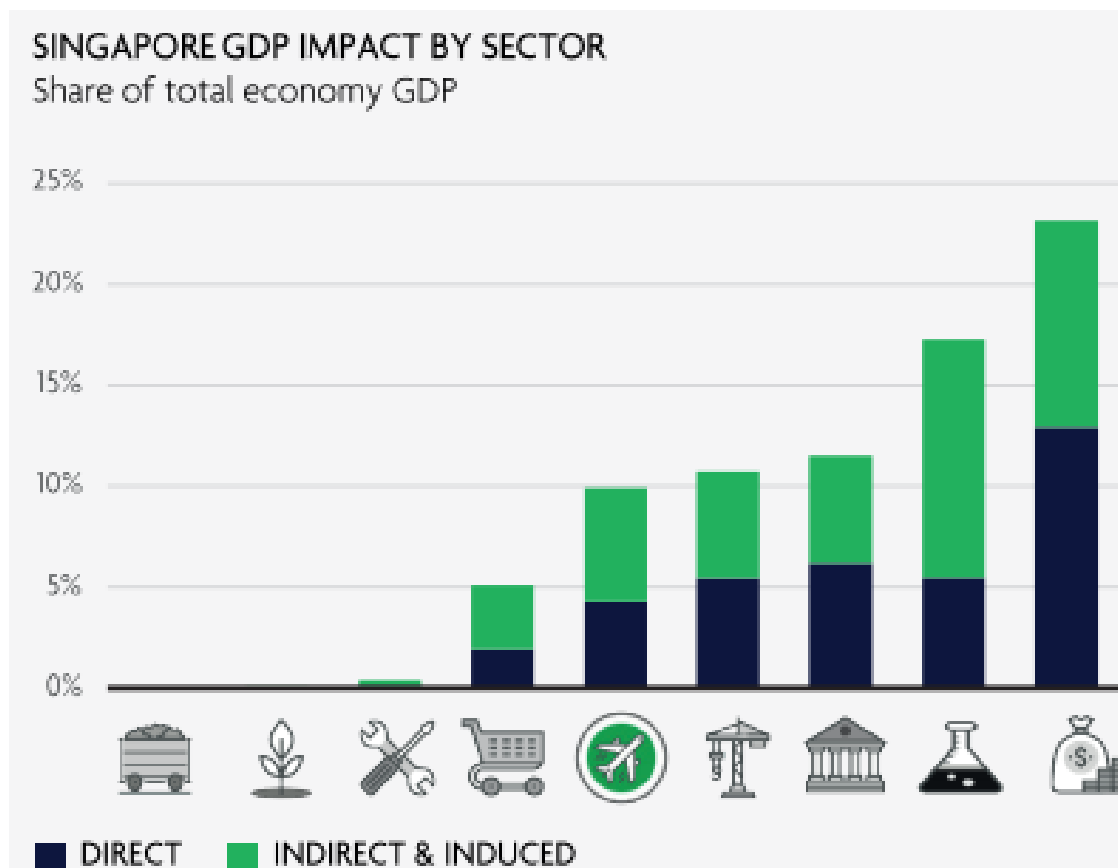
SINGAPORE TOURISM GDP

SINGAPORE GDP IMPACT BY SECTOR
\$ billion (2016 prices)



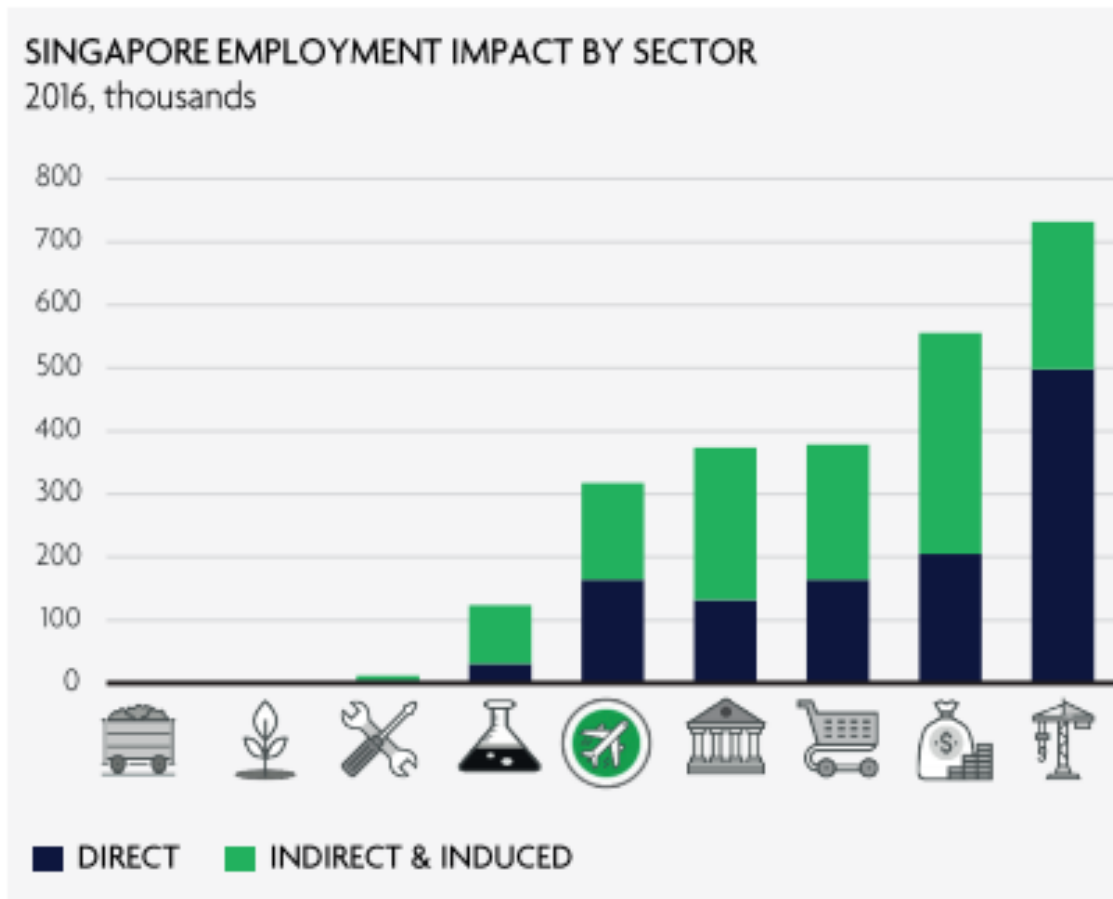
29
BILLION
of Tourism
GDP
(2016
prices)

SINGAPORE TOURISM GDP (%)



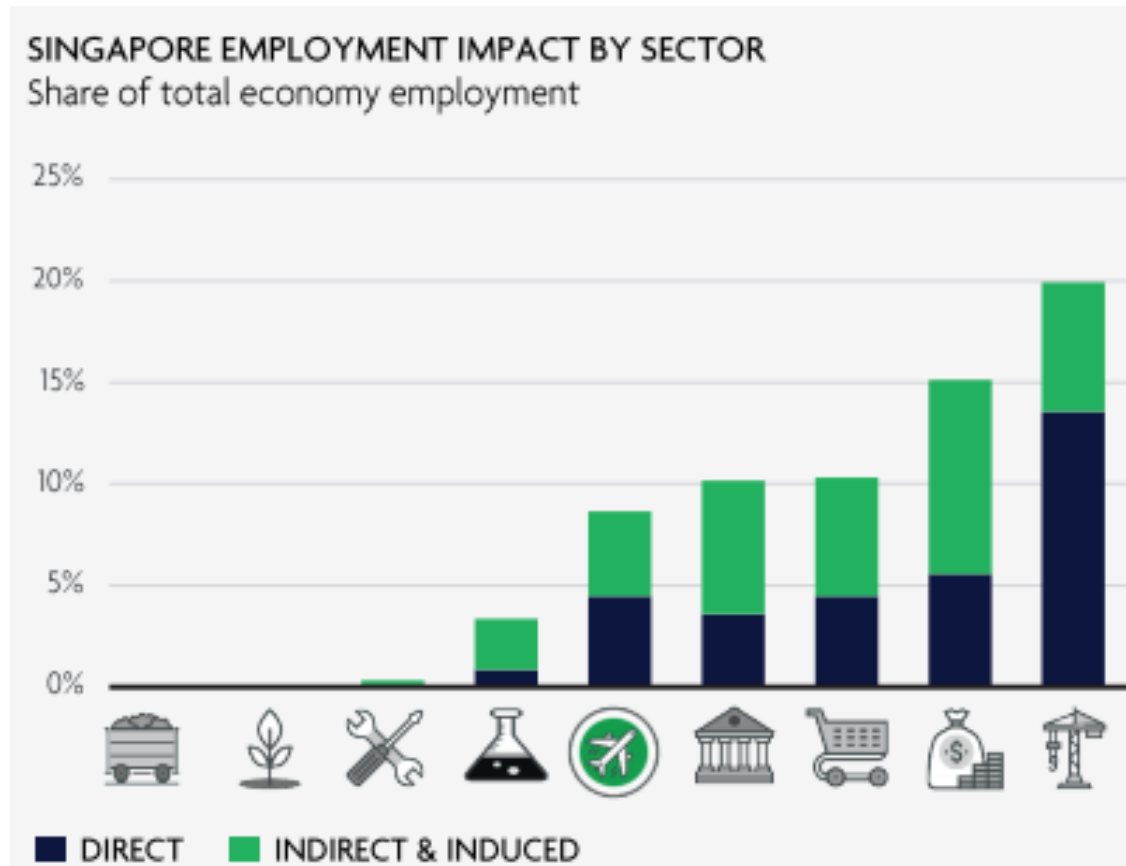
Tourism
GDP
9,9% of
Total
economy
GDP

SINGAPORE TOURISM EMPLOYMENT IMPACT



Tourism
employment
sustained
0,3 million
jobs

SINGAPORE TOURISM EMPLOYMENT IMPACT



Tourism
generated
8,6% of
employment
in Singapore



SINGAPORE TOURISM FUTURE TRENDS

SINGAPORE GDP FORECAST BY SECTOR CAGR% 2017-2027

-0.2%



0.5%



1.3%



1.7%



2.7%



3.0%



3.1%



3.3%



3.6%



3.8%



Tourism
GDP is
expected to
grow with an
annual
average of
3%



SINGAPORE OUTBOUND TOURISM

	2016	2017	Change % 2017/ 2016
Outgoing Travel Expenditure	23.838	24.543	+3,0

ITALIA

ITALY IS 5° IN TOP 10 SINGAPORE DESTINATIONS

	n. Departures abroad		Change %
	2016	2017	2017 /2016
United States Of America	145.546	153.679	5,6
Mexico	97.372	94.274	-3,2
Hong Kong, China	91.758	91.304	-0,5
United Kingdom	70.815	74.189	4,8
Italy	57.480	60.042	4,5
Canada	52.979	54.955	3,7
Poland	44.500	46.700	4,9
France	29.636	44.265	49,4
Russian Federation	31.659	39.629	25,2
Ukraine	25.226	27.067	7,3

ITALIA

TOURISM IN ITALY FROM SINGAPORE

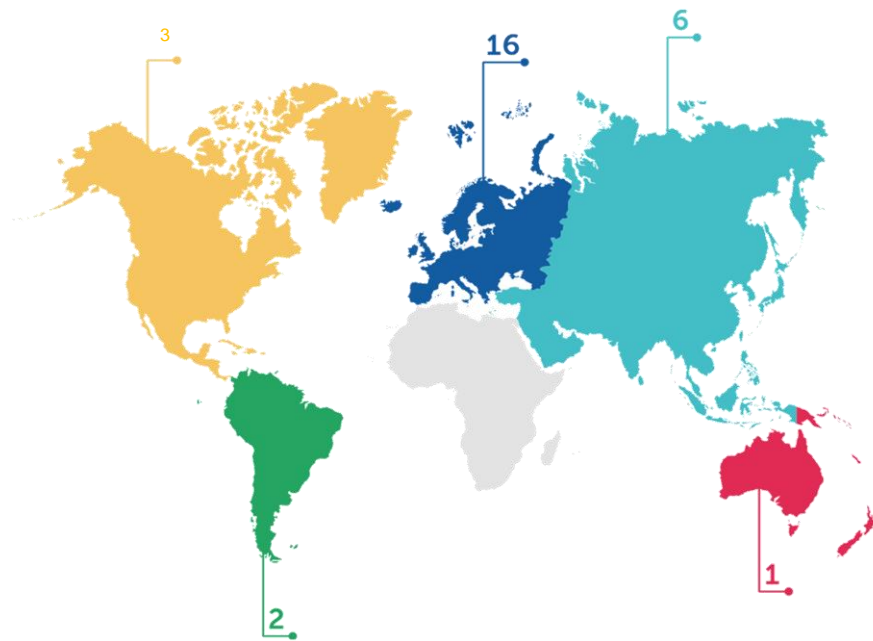
	TOURISM EXPENDITURE IN ITALY (Euros)	TOURISM NIGHTS SPENT	TOURISM TRAVELLERS
SINGAPORE	22.204.433,74	123.312	23.065



ENIT - The Italian National Tourist Board promotes Italy as a travel destination since 1919.

Since 2016, ENIT has a new business structure that allows **resource** optimization, the increase of **efficiency** in terms of expenditure and performance, and the **growth** of the promotional actions' efficacy.

ENIT headquarter is in Rome with 28 branches around the world



ENIT IN THE WORLD

EUROPE

AMSTERDAM
amsterdam@enit.it
BERLIN
berlin@enit.it
BRUSSELS
brussels@enit.it
BUDAPEST
budapest@enit.it
FRANKFURT AM MAIN
frankfurt@enit.it
LISBON
lisbon@enit.it
LONDON
london@enit.it
MADRID
madrid@enit.it
MUNICH
munich@enit.it
MOSCOW
moscow@enit.it

PARIS
paris@enit.it
PRAGUE
praga@enit.it
STOCKHOLM
stockholm@enit.it
WARSAW
varsavia@enit.it
VIENNA
vienna@enit.it
ZURICH
zurigo@enit.it

ASIA AND MIDDLE EAST

BANGKOK
bangkok@enit.it
MUMBAI
mumbai@enit.it
BEIJING
beijing@enit.it

SEOUL
seoul@enit.it
TEL AVIV
telaviv@enit.it
TOKYO
tokyo@enit.it

AMERICAS AND OCEANIA

BUENOS AIRES
buenosaires@enit.it
LOS ANGELES
losangeles@enit.it
NEW YORK
newyork@enit.it
TORONTO
toronto@enit.it
SAO PAULO
saopaulo@enit.it
SYDNEY
sydney@enit.it

Thanks to its wide network, ENIT fosters partnership with

- ✓ Embassies
- ✓ Consulates
- ✓ Italian Cultural Institutes
- ✓ Italian Trade Commission
- ✓ Chamber of Commerce
- ✓ Italian Regions
- ✓ Italian Municipalities
- ✓ Other local Institutions
- ✓ TO, DMC, TA, Convention Bureau

Accessibility

Flying here is easier

With 31 international airports and over 13 low-cost airlines, every corner of Italy is easily accessible to you.

Italy's busiest airports by passenger traffic:

- **Rome** – Leonardo da Vinci International Airport won the 2018 ACI EUROPE Best Airport Award
- **Milan** – Malpensa Airport is freshly renovated, having welcomed the world for Expo 2015
- **Venice** – Marco Polo Airport

*Source: Data Source: ENIT Studies Office.

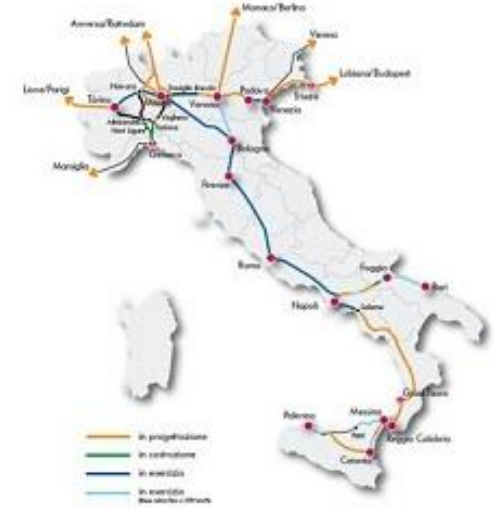


Italy lies right in the heart of the Mediterranean With excellent connections by air of all major and minor cities

Why choose Italy as destination?

Once in Italy, you can count on a **HIGH SPEED** railway network

Italy has over **16.530 KM** of railway with stations throughout the country



Italian Excellences in tourism

- Sun & Beach
- Active and Sports
- Made in Italy
- Culture



Sun & Beach

Italy boasts about 8,000 kilometers of **coastline**, an unparalleled natural and immaterial heritage, and an innate maritime vocation that involves the entire national socio-economic destination



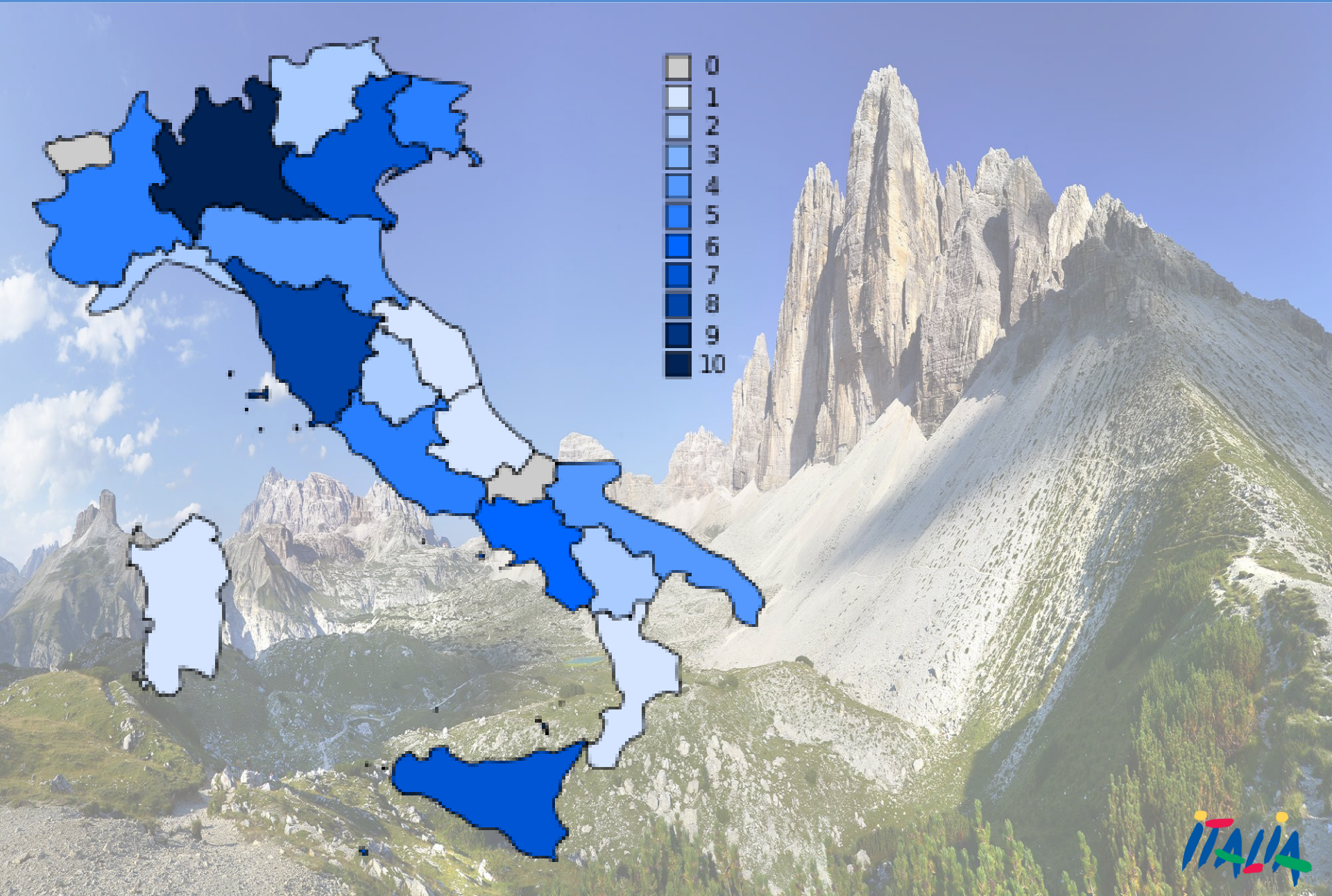
ITALIA

Sun & Beach

In 2018, 368 beaches with their clean crystal clear waters, 178 resorts and 70 tourist landing sites were awarded the Blue Flag



Unesco Sites



Italy as a shopping destination

Foreign expenditure in Italy for shopping

1,4 billion euro in 2017

+ 15,1% on 2016

+ 30,8% on 2013

**4,0% of total
international
expenditure in Italy**



Italy 1° as world destination for luxury travels

Ideal for affluent, millennial, families and honeymoon

Top 10 travel destination				
Rank '19	Affluent	Millennial	Families	Honeymoon
1	Italia	Italia	Italia	Italia
2	France	Thailandia	Mexico	Maldiva
3	South Africa	Island	Hawaii	French Polinesia
4	United States	South Africa	Orlando	Maui
5	Island	Australia	England	France
6	Mexico	Croatia	South Africa	Seychelles
7	Spain	Costa Rica	Costa Rica	Thailandia
8	Croatia	France	France	Bali
9	Japan	Bali	Rep. Dominicana	Mexico
10	Australia	Perù	Spain	Greece

Fonte: Ufficio Studi ENIT su dati Virtuoso



Honeymoon

217 millions euro spent by international honeymooning tourists in Italy
+16,4% on 2016

Top international spenders in Italy (millions €) for honeymooning travels

Country	2016	2017	Change % 17/16	Rate % on total 2017
United States	51,3	51,3	-	23,6
Brasil	5,6	27,9	401,2	12,9
Japan	8,4	17,5	108,4	8,1

Fonte: Ufficio Studi ENIT su dati Banca d'Italia



Food&wine Tourism Trends

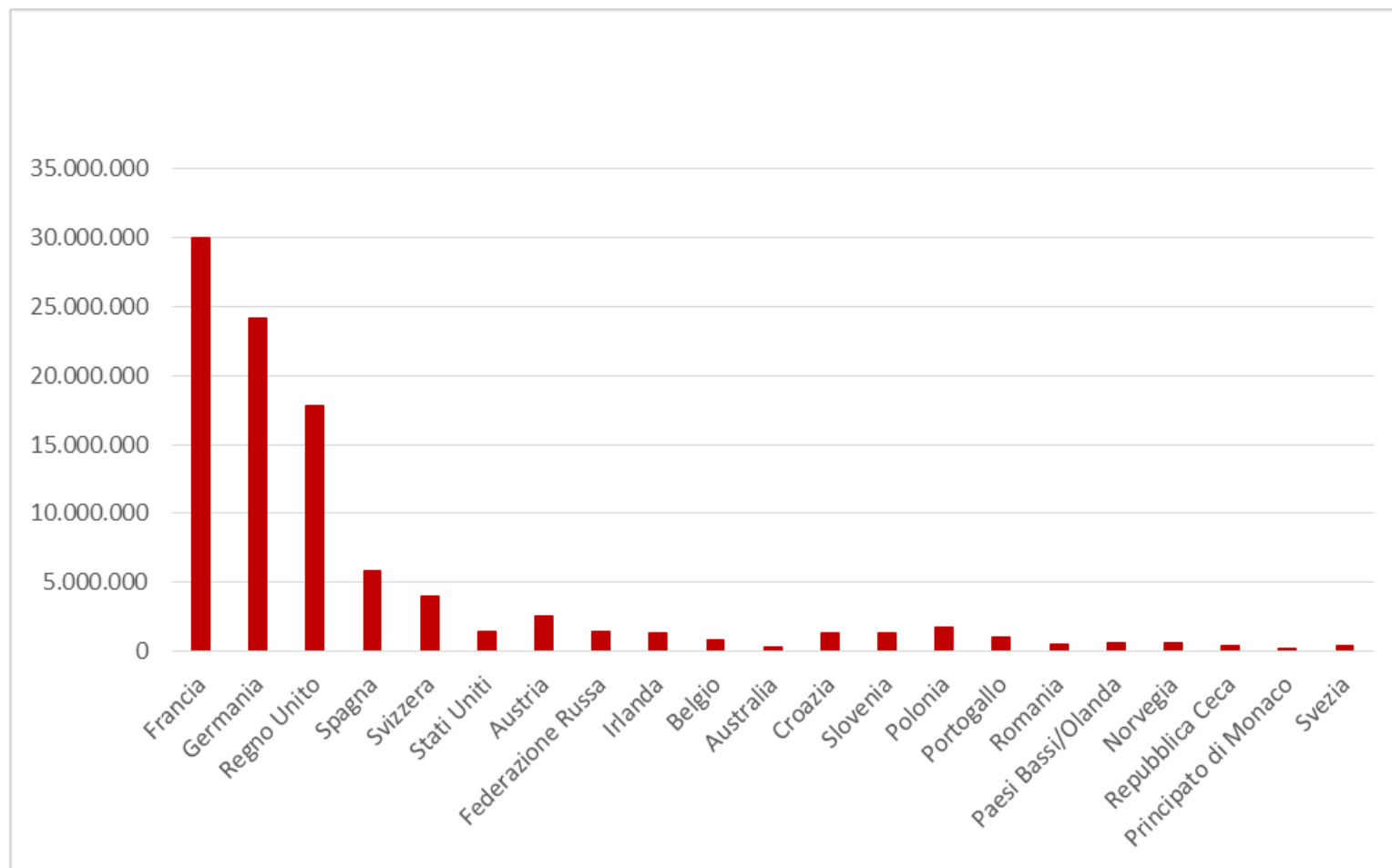
In the first quarter 2019, on-line and off-line tour operators' sales demonstrate a continuous growth of Food&Wine tourism demand (+5%).

In long haul markets, Food&Wine tourism itineraries are ALWAYS sold in association with other tourism products.



Natural beauties

The natural beauty of the place motivates 8% of tourists (9.6% foreigners and 6.5% Italians)



Active Tourism and Sport in Italy

Sport **17,7% of tourists in Italy**

28,6% of tourists travelling in Italy for various reasons,
practice sport during their holiday

(25% italians, 32,4% foreigners)

International expenditure for Sport Holidays in Italy
410 millions euro, +50% on 2016

ITALIA

ART CITIES

Cultural heritage

Our country has immense cultural wealth: **3,609 museums; 5,000 monuments, museums and archaeological areas; 46,025 fixed architectural assets; 34,000 places of entertainment**, hundreds of festivals and cultural initiatives, traditions that animate our territories.

















UNESCO SITES

Travel Ideas



With 54 sites included in the list of World Heritage Sites, Italy is at the top of all countries: **the Dolomites, the Po Delta, the archaeological area of Pompeii and Herculaneum, the Sassi and the park of the rock churches of Matera, the Aeolian Islands.** All places to visit to learn about and to experience the history, art and culture of the BelPaese.























SHOPPING

Shopping Experience

Having become a mass phenomenon, it is going through a state of full evolution, thanks also to the expansion of factory outlet centers, which have become an attraction for the country for many foreign tourists who, especially during sales, enjoy organized tours and dedicated charter flights. **Via dei Condotti in Rome, via dei Mille in Naples and via Montenapoleone in Milan** are among the most sought after streets.









Italian route of Luxury hospitality



That of luxury tourism on the Italian market is a constantly growing business. You can immerse yourself in the magical atmosphere of Italy, enjoying a unique and unrepeatable experience by choosing exclusive stays, **resorts in Tuscany, living the Costa Smeralda, visiting the splendid Masserias of Salento or discovering the Amalfi Coast and its islands of Capri or Ischia**













HONEYMOON

Romantic Italy



A honeymoon is much more than a vacation, it offers intense, deep and unique emotions.

Venice, Rome, Florence, the Amalfi Coast, Como and its lake are just some examples of perfect locations for an unforgettable honeymoon













International reviews

Italy is the land of composers such as Paganini, Rossini, Verdi, Puccini, Vivaldi. Every year Italian theaters offer shows in suggestive places recognized all over the world: the **Arena di Verona, La Scala in Milan, the Fenice in Venice, the Teatro dell'Opera in Rome, the San Carlo theater in Naples.**











Taste Itineraries



Italy is synonymous with eating well: an explosion of tastes, flavors and aromas. It is the most renowned cuisine in the world and offers more than any other an incredible variety. A journey into Italian gastronomic culture, in search of genuine products. **Parmigiano Reggiano, balsamic vinegar of Modena, Ligurian pesto, buffalo mozzarella from Campania, truffle from Alba** are just some of the products that make the BelPaese the land of taste.









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Sustainable tourism



Natural landscapes unique in the world, with the variety that characterizes Italy, descending **from the Alps to the beaches of the South**.

A wealth that goes from natural parks, mountain or marine, to wildlife or zoological reserves to rural villages, etc.



















SPORT

Events

Great football, the Giro d'Italia, the Monza Grand Prix, the Piazza di Siena horse show, the 2022 Ryders Cup in Rome, are just some of the events that represent Made in Italy sports tourism: a treasure that is worth over 42 million presences, for a turnover of almost 5 billion euros per year.











ITALIA













Italian **BORGHI**



Italian TRADITIONS



Italian **TASTE**



Italian **BEAUTY**



Italian LANDSCAPES



Italian **EMOTIONS**



Thank you

