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WEGWEISEND IM TOURISMUS

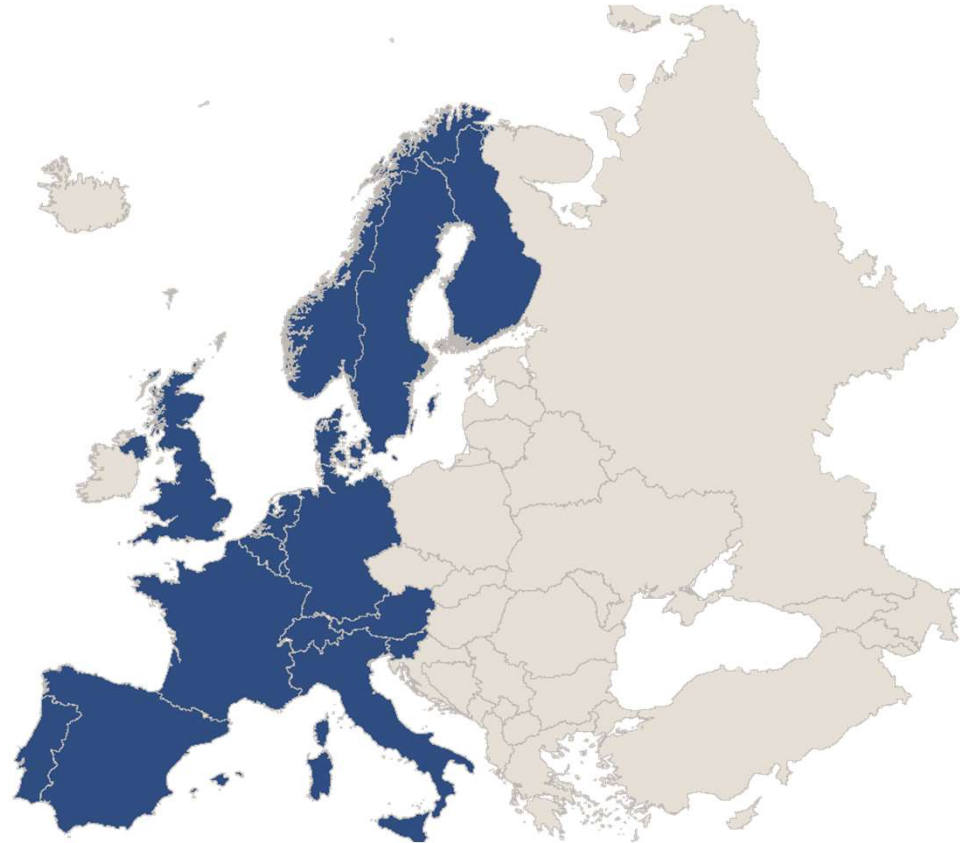
ECONOMIC FACTOR OF TOURISM CAMPING IN SELECTED EUROPEAN COUNTRIES

Dr. Bernhard Harrer, Board of Directors dwif e.V.
Moritz Sporer, Senior Consultant dwif-Consulting GmbH

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This document is part of the presentation and is incomplete without explanation.

Investigated area



Source: dwif 2020, Map: GFK RegioGraph

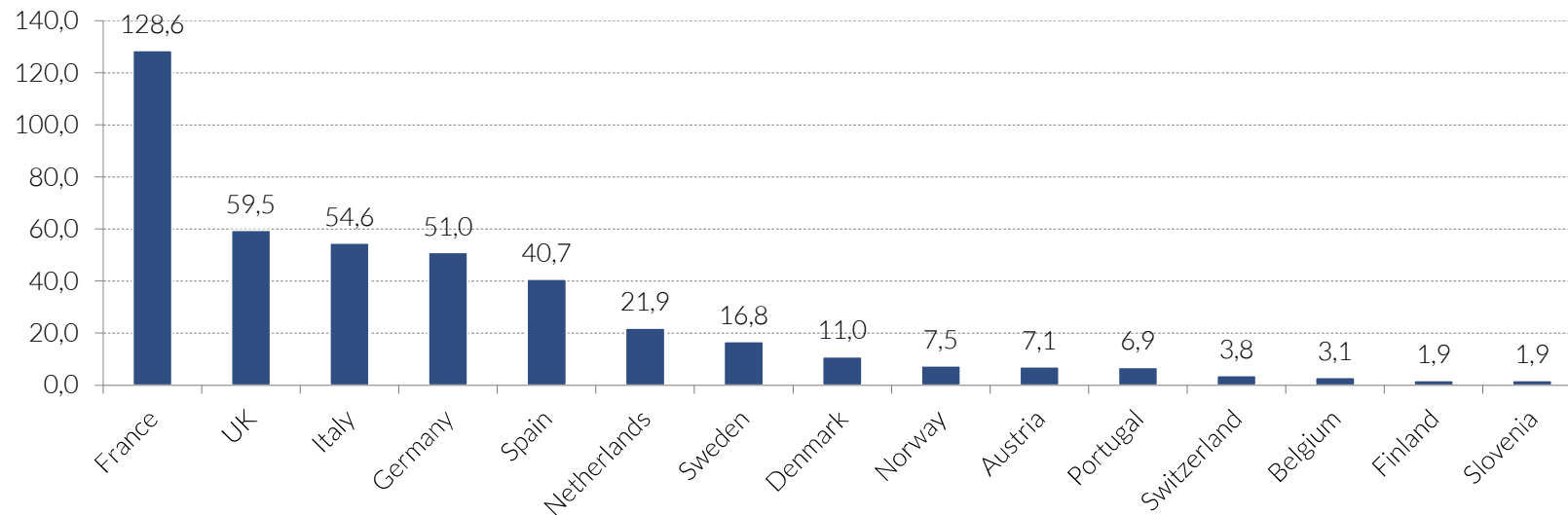
Distribution of vehicle-stock by country

| |  Motor Caravans |  Caravans |  Leisure Vehicles |
|--------------|--|--|--|
| Germany | 589.355 | 698.596 | 1.287.951 |
| France | 524.800 | 540.000 | 1.064.800 |
| Italy | 234.400 | 65.000 | 299.400 |
| UK | 225.000 | 555.000 | 780.000 |
| Netherlands | 127.181 | 429.299 | 556.480 |
| Sweden | 104.221 | 285.701 | 389.922 |
| Spain | 70.000 | 230.000 | 300.000 |
| Switzerland | 64.904 | 35.587 | 100.491 |
| Belgium | 59.060 | 40.784 | 99.844 |
| Finland | 58.461 | 66.519 | 124.980 |
| Norway | 51.739 | 122.022 | 173.761 |
| Austria | 30.136 | 39.154 | 69.290 |
| Denmark | 10.152 | 124.399 | 134.551 |
| Portugal | 10.000 | 18.000 | 28.000 |
| Slovenia | 5.870 | 6.329 | 12.199 |
| Total | 2.165.279 | 3.256.390 | 5.421.669 |

Source: CIVD/ECF surveys, estimates 2020.

Distribution of overnight stays of tourist campers on campsites by country

(Figures in millions)



Source: Eurostat (Statistical Office of the European Union), nights spent by tourist accommodation establishments, Luxembourg 2020.

416,3 Mio.

Overnight stays by touristic
campers
on campsites in total

Source: Eurostat (Statistical Office of the European Union), nights spent by tourist accommodation establishments, Luxembourg 2020.

Turnover by tourist campers for overnight stays on campsites

In total around **416,3 Mio.** overnight stays by tourist campers on camping sites

X

Basic costs on the campsite
(excluding restaurants), retail,
etc.)

11,50 € per capita and day

=

4.787,5 Mio. €

Gross turnover

X

Additional expenses of tourist
campers on and outside
campsites

30,30 € per capita and day

=

12.613,9 Mio. €

Gross turnover

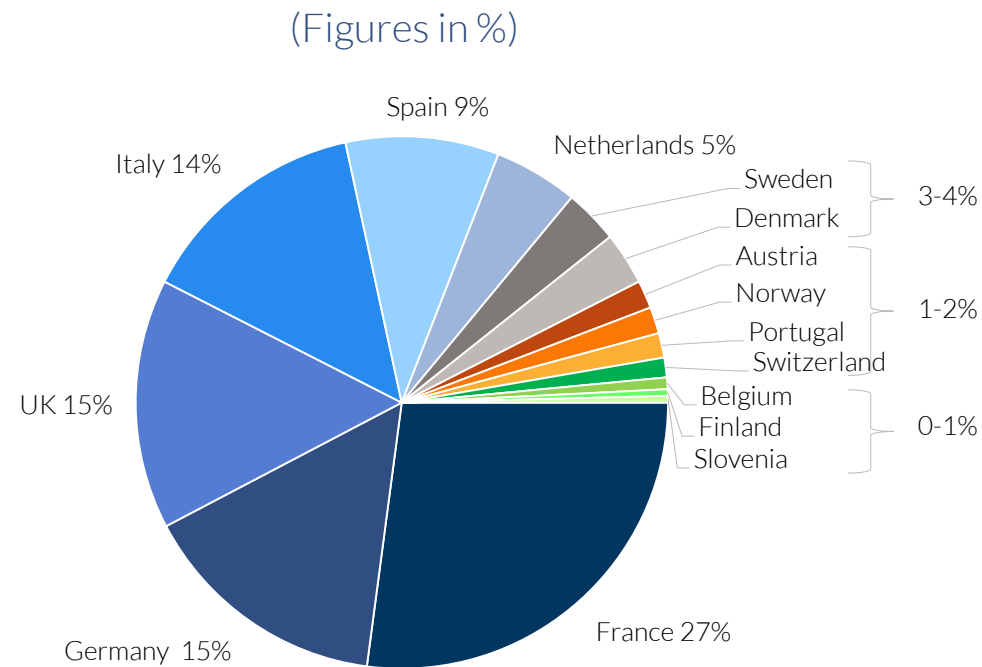
Source: dwif database evaluations, ADAC camping prices based on ADAC camping guide/pitch guide 2019, Eurostat overnight stays and cost of living index, 2020.

17.401,4 Mio. €

Gross turnover by tourism campers
for overnight stays on campsites

Source: dwif database evaluations, ADAC camping prices based on ADAC camping guide/pitch guide 2019, Eurostat overnight stays and cost of living index, 2020.

Turnover by tourism campers for overnight stays on campsites by country (in total 17.401,4 Mio. €)



Source: dwif database evaluations, ADAC camping prices based on ADAC camping guide/pitch guide 2019, Eurostat overnight stays and cost of living index, 2020.

Gross turnover by tourism campers with overnight stays on campsites by country

| Germany | 2,6 Bn. € |
|----------------|-------------------|
| France | 4,7 Bn. € |
| Italy | 2,4 Bn. € |
| United Kingdom | 2,6 Bn. € |
| Netherlands | 0,9 Bn. € |
| Sweden | 0,6 Bn. € |
| Spain | 1,6 Bn. € |
| Switzerland | 0,2 Bn. € |
| Belgium | 0,1 Bn. € |
| Finland | 0,1 Bn. € |
| Norway | 0,3 Bn. € |
| Austria | 0,3 Bn. € |
| Denmark | 0,6 Bn. € |
| Portugal | 0,3 Bn. € |
| Slovenia | 0,1 Bn. € |
| Total | 17,4 Bn. € |

Source: dwif database evaluations, ADAC camping prices based on ADAC camping guide/pitch guide 2019, Eurostat overnight stays and cost of living index, 2020.

Turnover by tourist campers for overnight stays outside campsites and day trips

| | |
|---|---|
| Overnight stays outside campsites 78 Mio. | Day trips outside campsites 55 Mio. |
| X | X |
| 47,- € Daily spending per capita | 42,- € Daily spending per capita |
| = | = |
| 3.666,0 Mio. € Gross turnover | 2.310,0 Mio. € Gross turnover |

Source: dwif database analyses, Eurostat Cost of living index, 2020

5.976,0 Mio. €

by tourist campers for overnight stays
outside campsites and day trips

Source : dwif Datenbankauswertungen, Eurostat Lebenshaltungskostenindex, 2020.,

Economic factor tourism camping in selected European countries

VEHICLE-STOCK
MOTOR CARAVANS



2.165.279

VEHICLE-STOCK
CARAVANS



3.256.390

DAYS SPENT
TOTAL



549,3 Mio.

Ø-SPENDINGS
PER CAPITA AND DAY



42,60 €

GROSS TURNOVER
TOTAL



23.377,4 Mio. €



Source: dwif 2020

23.377,4 Mio. €

Gross turnover
by tourism campers in total

Source: dwif 2020,

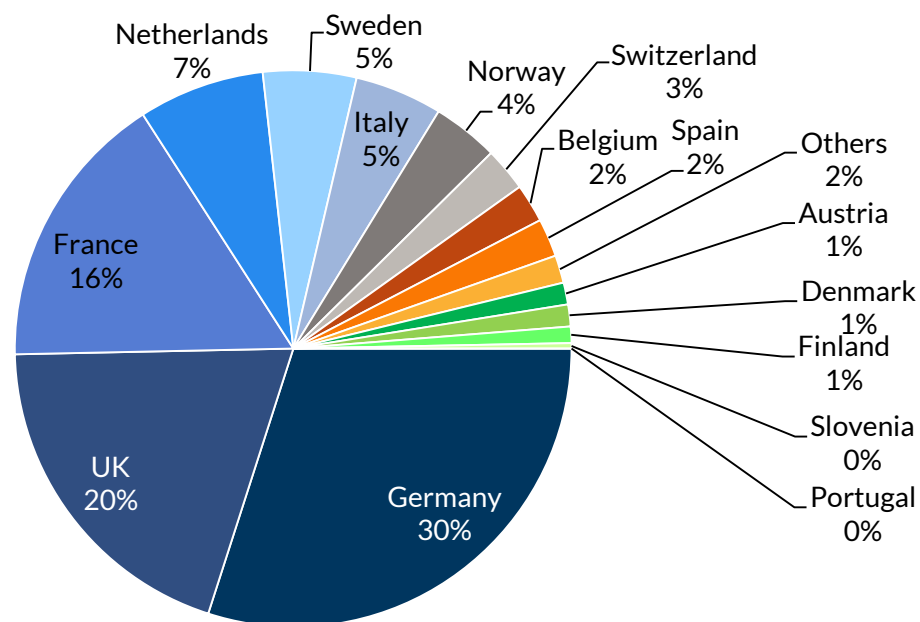
Basis for industry gross-turnover: New and used registrations in Europe 2019

| |  Motor Caravans | |  Caravans | |
|--------------|--|----------------|--|----------------|
| | New | Used | New | Used |
| Austria | 1.704 | 3.971 | 980 | 3.833 |
| Belgium | 5.007 | 7.078 | 1.195 | 4.473 |
| Denmark | 764 | 1.528 | 2.551 | 10.733 |
| Finland | 1.727 | 3.454 | 783 | 1.566 |
| France | 23.776 | 61.544 | 7.728 | 45.531 |
| Germany | 53.922 | 79.924 | 26.941 | 78.866 |
| Italy | 6.066 | 38.654 | 777 | 9.684 |
| Netherlands | 2.097 | 26.109 | 7.034 | 46.173 |
| Norway | 3.590 | 10.950 | 2.725 | 18.710 |
| Portugal | 282 | 564 | 104 | 208 |
| Slovenia | 380 | 760 | 138 | 276 |
| Spain | 5.977 | 10.565 | 2.217 | 5.443 |
| Sweden | 4.147 | 16.588 | 3.293 | 8.234 |
| Switzerland | 5.345 | 10.690 | 1.584 | 3.168 |
| UK | 15.342 | 57.697 | 18.266 | 67.175 |
| Others | 2.342 | 4.684 | 1.717 | 3.434 |
| Total | 132.468 | 334.760 | 78.033 | 307.507 |

Source: CIVD/ECF-survey, estimates

Distribution of industry-turnover by country

(Figures in %)



Distribution of industry-turnover by country

| | Gross-turnover |
|--------------|-------------------|
| Germany | 9,4 Bn. € |
| UK | 6,2 Bn. € |
| France | 5,1 Bn. € |
| Netherlands | 2,3 Bn. € |
| Sweden | 1,7 Bn. € |
| Italy | 1,6 Bn. € |
| Norway | 1,2 Bn. € |
| Switzerland | 0,8 Bn. € |
| Belgium | 0,7 Bn. € |
| Spain | 0,7 Bn. € |
| Others | 0,5 Bn. € |
| Austria | 0,4 Bn. € |
| Denmark | 0,4 Bn. € |
| Finland | 0,3 Bn. € |
| Slovenia | 0,1 Bn. € |
| Portugal | 0 Bn. € |
| Total | 31,5 Bn. € |

Source: CIVD/ECF-survey, estimates

Total European market turnover: approx. 55 Billion Euro branch

Caravanning industry

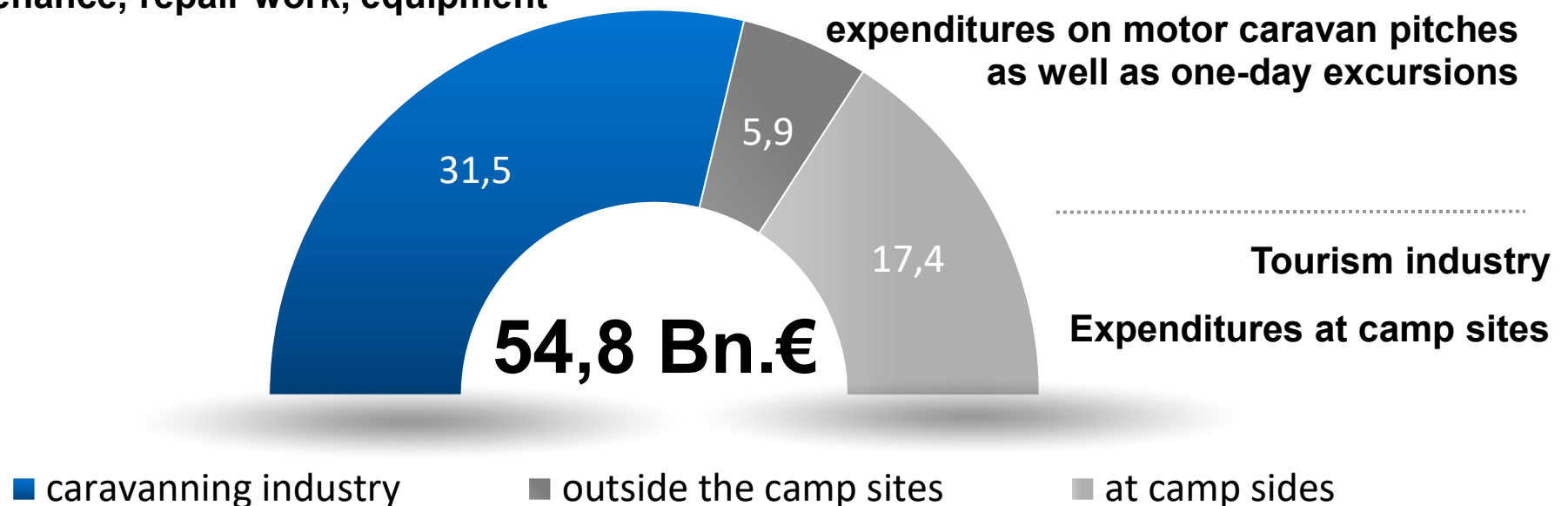
New and second hand vehicles,
maintenance, repair work, equipment

Tourism industry

expenditures on motor caravan pitches
as well as one-day excursions

Tourism industry

Expenditures at camp sites



Source: CIVD/ECF-survey, estimates

Contacts



DR. BERNHARD
HARRER

Vorstand
dwif e.V.

b.harrer@dwif.de
+49(0)89 / 237 028 9-16



MORITZ
SPORER

Senior Consultant
dwif Consulting GmbH

m.sporer@dwif.de
49(0)89 / 237 028 9-23



dwif e.V.




Sonnenstraße 27
80331 München

www.dwif.de

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Distribution of vehicle-stock by country

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| Italy | 234.400 | 65.000 | 299.400 |
| UK | 225.000 | 555.000 | 780.000 |
| Netherlands | 127.181 | 429.299 | 556.480 |
| Sweden | 104.221 | 285.701 | 389.922 |
| Others | 360.322 | 682.794 | 1.043.116 |
| Total | 2.165.279 | 3.256.390 | 5.421.669 |

Quelle: CIVD Statistiken, ECF Erhebungen, Schätzungen 2020

Total european market turnover: approx. 55 Billion Euro branch

Caravanning industry

New and second hand vehicles,
maintenance, repair work, equipment

Tourism industry

expenditures on motor caravan pitches
as well as one-day excursions

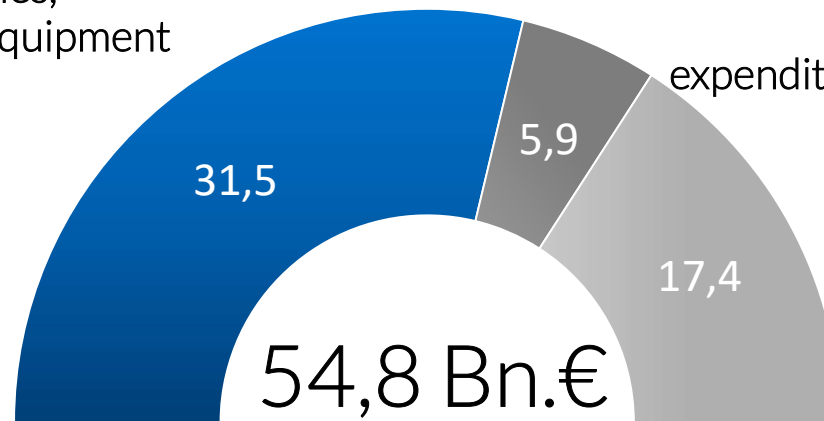
Tourism industry

Expenditures at camp sites

■ caravanning industry

■ outside the camp sites

■ at camp sides



Source: CIVD/ECF survey, estimates 2020