



Tourism Optimizer Platform
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Barometer Report

Governmental and Institutional Travel and Tourism

EXECUTIVE EXTRACT: gitt-sector/upd/0319/02-22

1. Introduction

This document aims to summarize some of the results of the "GITT barometer report" project. A research project carried out by the tourism observatory that TOP has promoted and coordinated. It analyzes both the historical evolution of this type of travel and its nature, as well as the distinction with other travelers and the projections of this type of travel.

1.1. TOP Project and the Governmental Travel Sector

Governmental and institutional travel is a segment of its own within the Travel & Tourism industry, due to its very nature and characteristics. Identified as a result of the Tourism Optimizer Platform (TOP) project, this sector has been officially named Governmental and Institutional Travel and Tourism (GITT), both by organizations such as the World Tourism Organization (UNWTO) and academic institutions on an international scale.

In this process, TOP has coordinated and provided part of the team of experts who, together with external collaborators and consultants at the highest level (industry professionals, companies in the sector, hotel chains and academics), have developed their research work in conjunction with universities and academic institutions such as the University of Seville (US), through the university chair that has directed the tourism observatory of the GITT sector; the United Nations Institute for Training and Research (UNITAR) through its CIFAL (International Training Centre for Authorities and Leaders) centers; the Complutense University of Madrid (UCM), through its department of tourism research and commerce; and tourism research departments in centers attached to US and UCM; among others.

All this has resulted in a series of milestones for the industry and the sector, among which the following stand out:

- The research and writing of a Scientific Article gathering the fundamentals of the GITT sector.
- The creation of an International Standard containing all the flows and trends of the sector, whose mission is to standardize this type of travel.
- The development of research, academic and popularization initiatives, such as the GITT Chair with the University of Seville (Spain), training and divulgation programs with the United Nations Institute for Training and Research (UNITAR), or conferences with the Complutense University of Madrid (Spain), among others.

2. Project Data Extract

The following is the most relevant data on the Governmental Travel market trend, extracted from the papers generated within the Tourism Optimizer Platform (TOP) tourism observatory.

1. Number of annual travels by official delegations.
2. Average PAX's per delegation and type of travel.
3. Average expenditure per GITT traveler per day.
4. Country rankings.
5. Seasonality and GITT travel.
6. Characteristics of the GITT sector compared to other tourism sectors.
7. Main receiving cities and countries.

As a general parameter of the analysis, a comparative basis has always been made with the rest of the travelers, as well as the trend of the governmental and institutional travel sector itself.

External References

Both for this excerpt and for the final report of the barometer project, a large number of academic and/or scientific references have been taken into account, among which we highlight the following authors: Agranoff, Jafari, López Bonilla, Muñoz Mazón, Fuentes Moraleda, Paniagua, Huertas, Russell, Velasco González, Vogeler Ruíz, Hernández Armand, Schwarzenberger. Similarly, as main references in technical, informative or media aspects, we highlight: World Bank Group, Bloomberg, UNWTO, WTTC, European Parliament, BBC News, The New York Times, Euronews, Reuters, The Guardian, AFP, AP, France24, among others.

1. Number of annual travels by official delegations.

At present, governmental and institutional travel generates an average of more than 1,200 annual trips per country and official delegation (local, regional, national governments and other types of institutions).

The following is a breakdown of the historical sequence of these trips, as well as estimates up to the year 2025.

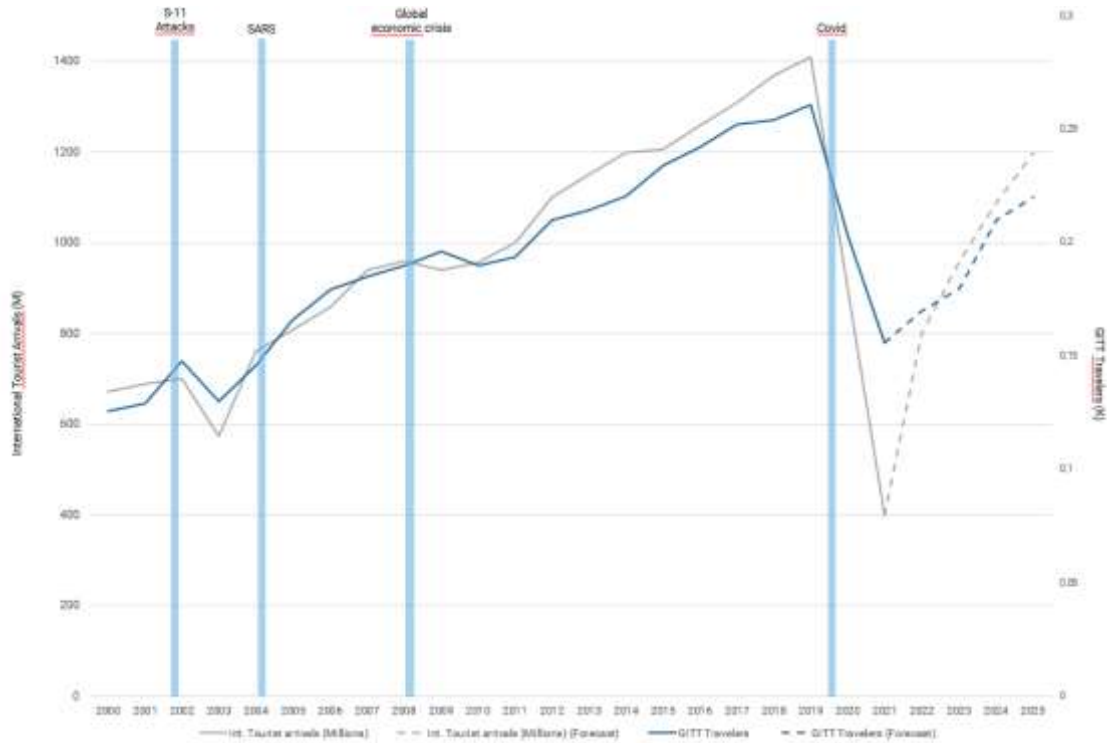
Year	Average annual trips per country official travel*
2018	1.377
2019	1.413
2020	741
2021	1.091
2022	1.237
2023	1.308
2024	1.524
2025	1.599

* Estimates of annual official travel of delegations by country.

Evolution and comparison between Governmental Travel and the rest of the travel market.
Reaction to crisis episodes.

CLARIFICATION OF THE FOLLOWING GRAPH. DIFFERENT SCALES

The following graph is aimed at comparing the evolution of the general travel sector with the subset demilitarized for Governmental Travel. Given the disparity of volume presented in both sets, the graph is presented with two scales in order to make a fair comparison of the evolution and recovery in the face of episodes of crisis in the international arena.



Caption analysis:

Due to globalization, both series have an upward trend, however, we can observe that in the postictal periods the of trend recovery of the Governmental Travel series presents an earlier change, which is justified by the need to undertake recovery measures and policies.

2. Average PAX's per delegation and type of Travel

The following is a breakdown of the average annual number of attendees per official delegation and country according to the type of event or main motivation for the official trip. Attendees include representatives, assistants, security teams, in-house media, etc.

Type of Travel	Attendees per Delegation Average
Summit or event of a periodic, geopolitical, environmental or extraordinary cause nature*	497
Summit or regional event of a periodic nature**	162
Periodic and socioeconomic trade fairs and events***	59
Scheduled bilateral events or events for extraordinary reasons	21

*UN General Assembly, NATO, World Economic Forum, G20, G7, COP, etc. **Summit of the Americas, Ibero-American Summit, APEC, EU, AU, UNASUR, ASPA, Arab League, etc. ***FITUR, ITB, WTM, NYT Travel Show, WDS, IBTM, MWC, etc.

3. Average expenditure per GITT traveler per day

Governmental and institutional travel can have significant variations in both duration and expenditure depending on the type of event or motivation for the trip, or even the main representative (or representatives) leading the delegation, among other aspects.

However, extrapolating and synthesizing the factors into groups of dominance, we can segment into only two groups. Thus, the average duration of a trip of this type is 3.97 days per traveler at destination or specific trip (in the case of multi-destination trips).

Accordingly, some data are broken down in this regard:

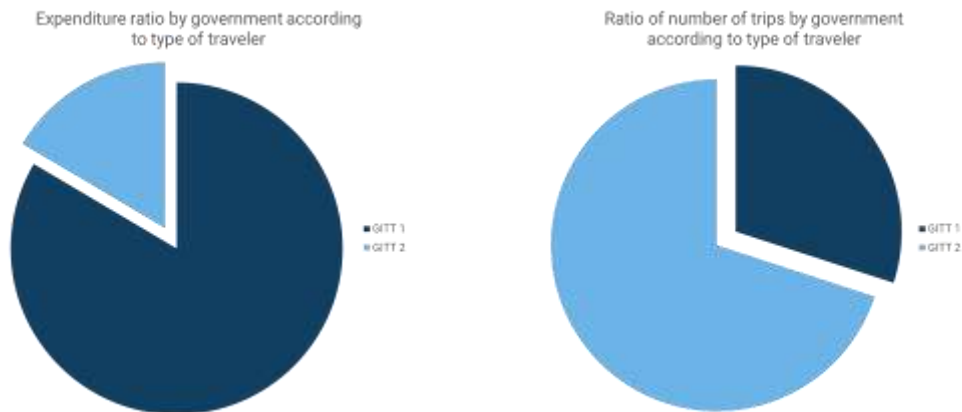
- Average expenditure of a traveler per day, according to dominance group.

Type of Delegation or Traveler	Average expenditure per day
GITT 1*	\$9.200 USD
GITT 2**	\$1.850 USD

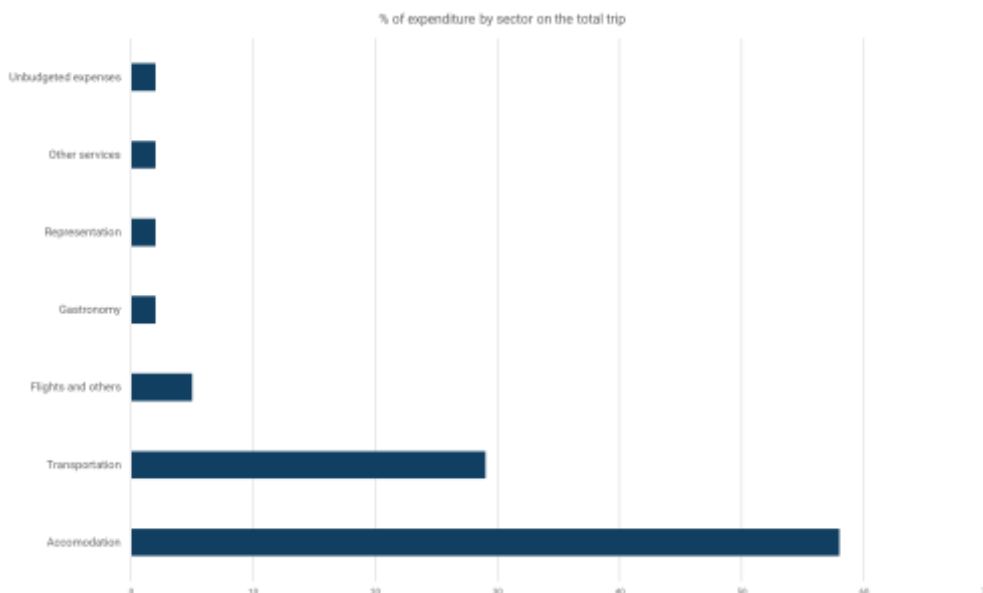
*High representatives: Heads of State, Prime Ministers, Presidents, Ministers, Secretaries General, etc.

** Intermediate representatives or members of security, protocol, press, etc. of large delegations.

- Segmentation of spending vs. number of trips: double graph comparison.



- Distribution of spending by tourism subsector.



*Translation, intermediation, guided tours, leisure, etc.

Expenditure concept	GITT 1	GITT 2
Accommodation	58%	55%
Ground transportation	29%	25%
Flights and other connections	5%	8%
Gastronomy	2%	5%
Representation	2%	4%
Other services	2%	2%
Incidental/miscellaneous	2%	1%

4. Country classification

The following is a segmentation of three groups of countries according to the variation in the number of governmental and institutional trips made annually, both in terms of the number of trips and the volume of members that make up their delegations; highlighting the statistical peak as the countries with the highest average number of trips and travel expenditures.

Group*	Number of countries	Average number of annual trips	Percentage of total spending in the sector
1	8**	1.903	61,20%
2	67***	1.319	36,47%
3	114	529	2,33%

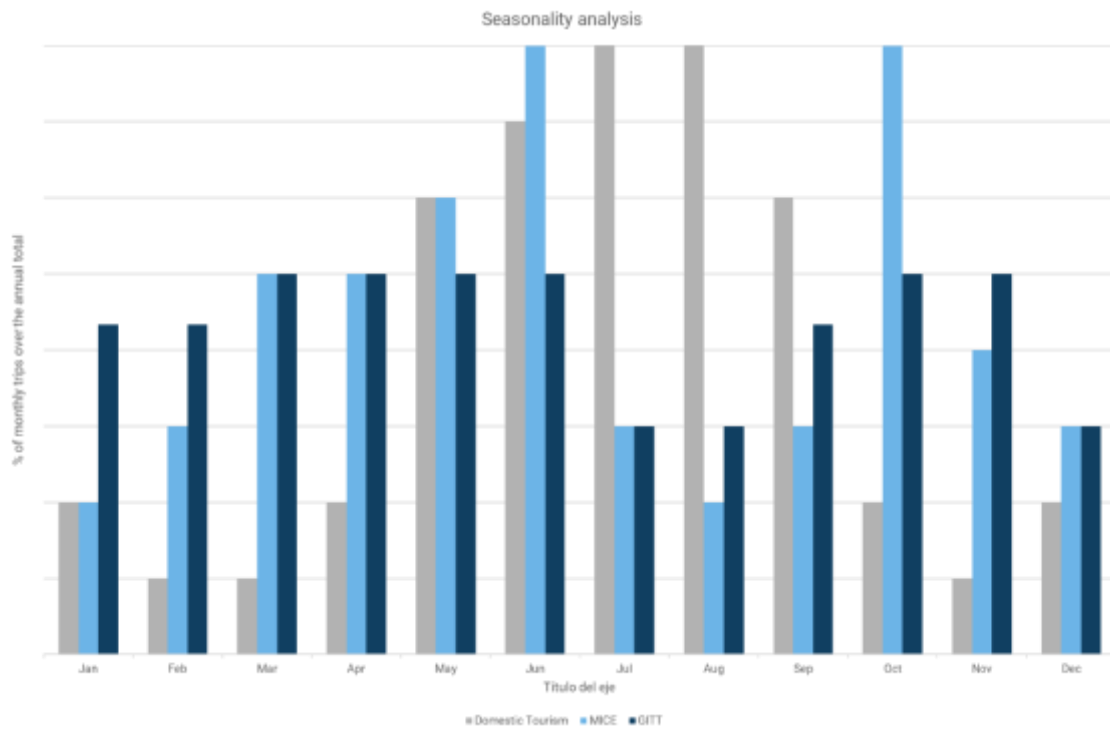
*Certain countries show marked statistical peaks, which have not been taken into account in studies and averages of certain figures.

**The United States, China, Japan, Germany, the United Kingdom, France, India and Italy.

***Brazil, Canada, South Korea, Russia, Saudi Arabia, Australia and Spain stand out.

5. Seasonality and GITT travel

The following graph of historical evolution presents the distribution of travel throughout the months of the year. A comparison between governmental travel, domestic tourism and MICE.



Caption analysis:

As we can see, the sharp changes in trends presented by the Domestic Tourism and MICE (Meetings, Incentives, Conferences and Exhibitions) series, are not remarkable in the Governmental Travel series, indicating the low seasonality of the sector.

6. Characteristics of the GITT sector as compared to other tourism sectors

Governmental and institutional travel	Other tourism sectors
Absence of seasonality.	Domestic tourism and MICE, among others, present a marked seasonality, concentrated in certain months of the year.
Little or no impact of external elements such as health, environmental, economic or political crises.	High impact of external elements.
3.97 days average trip duration.	Average trip duration of 2.05 days.
Average expenditure per traveler: US\$ 1,850 per day.	Average spending per traveler: US\$100-300 per day.

7. Main receiving cities and countries

Based on the number of trips by governmental delegations, and a geopolitical extrapolation, we can identify the main cities or destinations that accumulate the most governmental trips.

The following is a breakdown of the main cities and countries receiving governmental and institutional delegations, i.e., those that accumulate the most trips or events of this type, on average, over the course of a year.

Receiving cities*
New York (USA)
Brussels (Belgium)
Shenzhen (People's Republic of China)
Paris (France)
Berlin (Germany)
Singapore (Singapore)
Rome (Italy)
Madrid (Spain)
Buenos Aires (Argentina)
St. Petersburg (Russian Federation)

*By number of visits, congresses, fairs and other annual events.

3. Conclusions

NO SEASONALITY

SUSTAINABLE GROWTH

GLOBAL

Based on the data presented in this GITT Barometer Report Extract (which is more fully developed in this Barometer), we observe certain trends with respect to the governmental and institutional travel sector.

In addition to being supported by data collected by Tourism Optimizer Platform and partners, countries, institutions, non-governmental organizations, service suppliers and others, these historical data, trends and estimates show that this is a sector from which we can extract four significant facts:

- It generates directly more than 12.5 billion dollars, and many more indirectly in the form of signing contracts, agreements, job creation, generation of exclusive services, development of infrastructures in destinations, updating of equipment and vehicle fleets, etc.
- Elements such as globalization or issues such as sustainability, the environment, active diplomacy or trade between countries, institutions and public-private sector agents motivate this type of travel, which shows an upward trend, despite external elements that affect both the tourism industry and others.
- It is not limited to industry-specific phenomena such as seasonality, nor has a strong impact of external factors (health, environmental or political crises).
- Its recovery in the face of crisis episodes is notably faster than in other sectors, both tourism and non-tourism. This is largely due, based on empirical data, to the need for recovery measures and policies to be implemented by international organizations, countries and regions, which are generated and staged in this type of travel.