Market and Trade Profile: Italy

Italy

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Italian travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Italian visitors in the UK.

- **Chapter 2: Understanding the market** takes a close look at Italian consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by Italians are also highlighted.

- **Chapter 3: Access and travel trade** shows how Italians travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Italian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

Contents

Chapter 1:

Inbound market statistics

Chapter 1: Inbound market statistics

Chapter summary

- The Italian outbound market is forecasted to account for 35.8 million trips abroad with at least one overnight stay by 2020. The UK was the third most popular destination behind France and Spain for such trips in 2016.
- The Italians rank globally in 8th place for international tourism expenditure with more than US$25.0bn.
- Italy was the 7th largest inbound source market for the UK for volume and 7th most valuable for spend in 2016.
- France was the most considered alternative destination by Italian visitors, whilst about one in four did not consider an alternative destination to Britain.
- The Italian source market has a good seasonal spread with Q2 (April-June) the strongest quarter.
- 93% of departing Italian visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.

2016: £980m spend in UK

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips), UNWTO, VisitBritain/IPSOS 2016, CAA 2016 (leisure visitors)

Chapter 1.1: Key statistics

Key insights

- Italy is Britain's 7th largest source market in terms of visits and 7th most valuable for visitor spending (2016).
- 42% of spending came courtesy of holiday visitors, 22% from study visits and 18% from visits to friends and/or relatives in 2016.
- Italian holiday visits set a new record of 924,000 visits and VFR visits peaked at 547,000 in 2016.
- London is the leading destination for a trip to Britain but South East, South West and Scotland are also popular (based on the average nights spent in the UK 2014-2016).
- The most popular activities undertaken by Italian travellers in Britain include shopping, going to the pub and dining in restaurants as well as visiting parks and gardens, visiting museums/art galleries and built heritage.
- Most Italian visits were organised independently rather than bought as part of a package or all-inclusive holiday.

The UK was 3rd most popular destination for Italian outbound travel (2016)

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips)

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US$bn)	25.0
Global rank for international tourism expenditure	8
Number of outbound overnight visits (m)	31.3
Most visited destination	France

Inbound travel to Britain overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	1,615	10,613	683
2008	1,639	11,189	809
2009	1,221	8,294	591
2010	1,472	10,330	722
2011	1,526	9,676	792
2012	1,521	10,021	760
2013	1,636	11,262	816
2014	1,757	13,396	922
2015	1,794	13,094	890
2016	1,990	13,027	980
Share of UK total in 2016	5.3%	4.7%	4.3%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics (overnight trips)

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	1,990	11%	7
Nights (000s)	13,027	-1%	6
Spend (£m)	980	10%	7

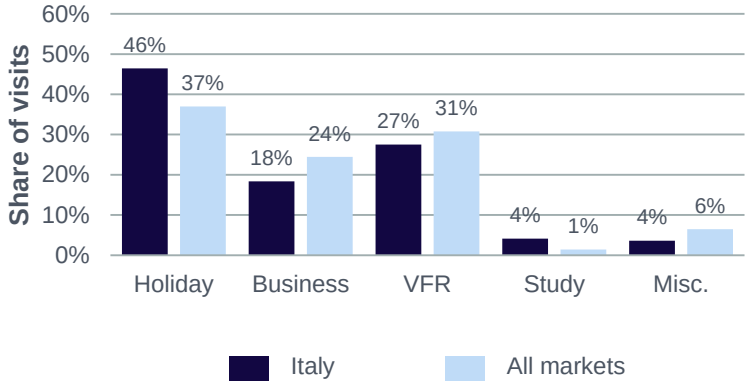
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	5	£87	£445
Business	3	£125	£381
Visiting Friends/ Relatives	6	£52	£315
Study*	38	£69	£2,637
All visits	7	£75	£493

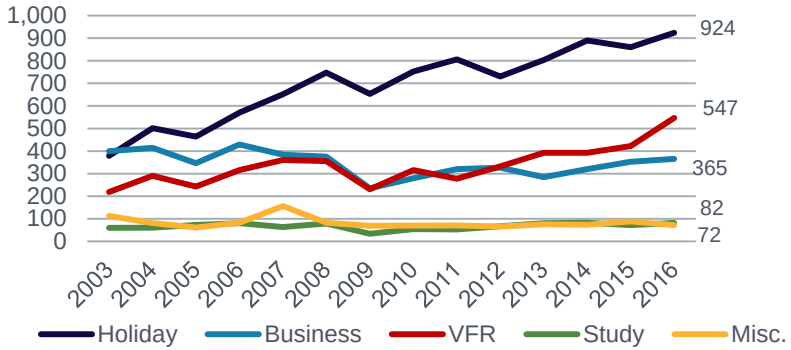
*Source: International Passenger Survey by ONS, *small base size*

1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



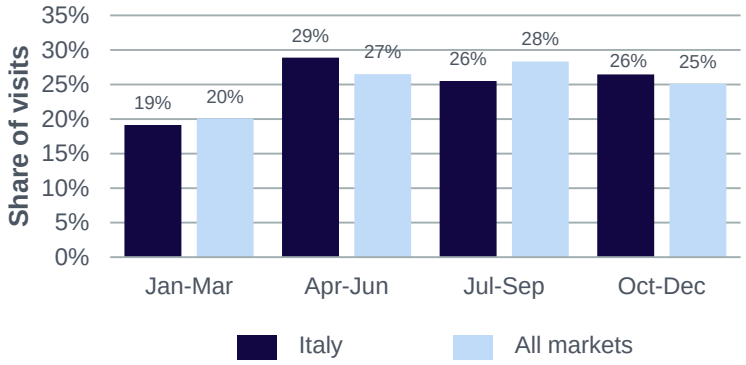
- 46% of all visits to the UK from Italy were made for holiday purposes, followed by 27% of visits made to visit friends and/or relatives in 2016.
- 59% of holiday visits from Italy to the UK in 2015 (excl. UK nationals) were made by repeat visitors.
- These repeat visitors came on average between two and three times (a medium average visit frequency compared to other markets) and spent on average £1,267 in the UK in the past ten years.
- Italian holiday visits set a new record of 924,000 visits and VFR visits peaked at 547,000 in 2016.

- In 2016, 42% of spending came courtesy of holiday visitors, 22% from study visits, 18 from visits to friends and/or relatives and 14% from business visits.
- Business visits have grown in recent years but were still short of the record set in 2006 (429,000 business visits) by more than 60,000 visits in 2016.
- 94% of those coming to the UK for business visits (excl. expats) had been to the UK before, followed by those coming to visit friends or relatives who live in the UK (87%).

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015

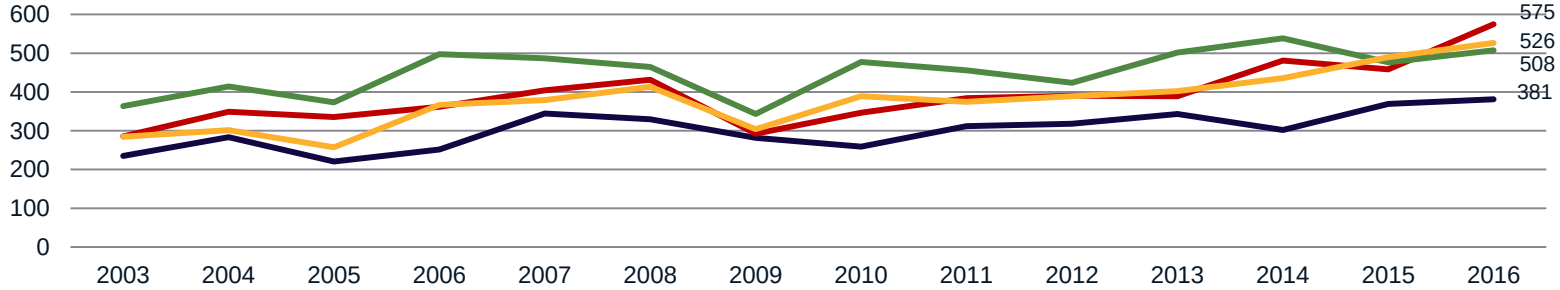
1.1 Key statistics: seasonality

Seasonality 2016



- In 2016, 29% of visits from Italy to the UK were made in the second quarter (Apr-Jun) followed by the last quarter (Oct-Dec) and the summer quarter (Jul-Sep). The latter, which is high season for many markets, saw a slightly below average share of visits from Italy. About 1 in 5 visits from Italy were made in Jan-Mar.
- The volume of visits for all quarters showed growth in 2016, led by the Apr-Jun period (+25% YoY). The last quarter of the year has gained momentum in the last few years, recently surpassing the summer season which has fluctuated and peaked in 2014.

Seasonality trend (visits 000s)

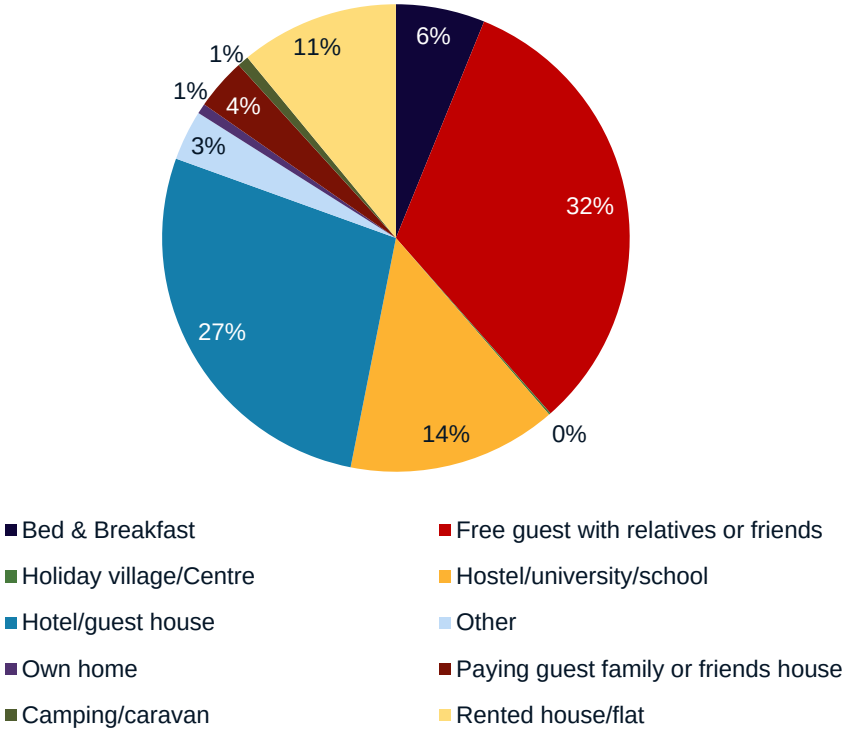


Source: International Passenger Survey by ONS

Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec

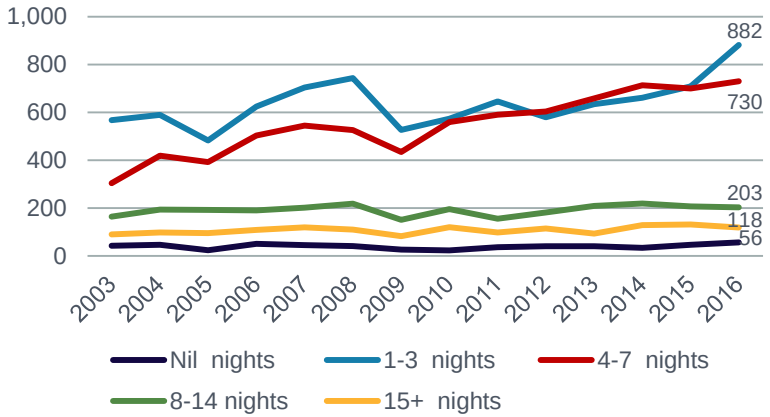
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016 (nights, %share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Italian visitors.
- Two forms of accommodation dominate the picture with about one in three nights spent staying for free with relatives or friends. 27% of nights are spent at a 'hotel/guest house'. Hostels/university or school accommodation are also popular making up 14% of nights in 2016 closely followed by rented houses/flats (11%).

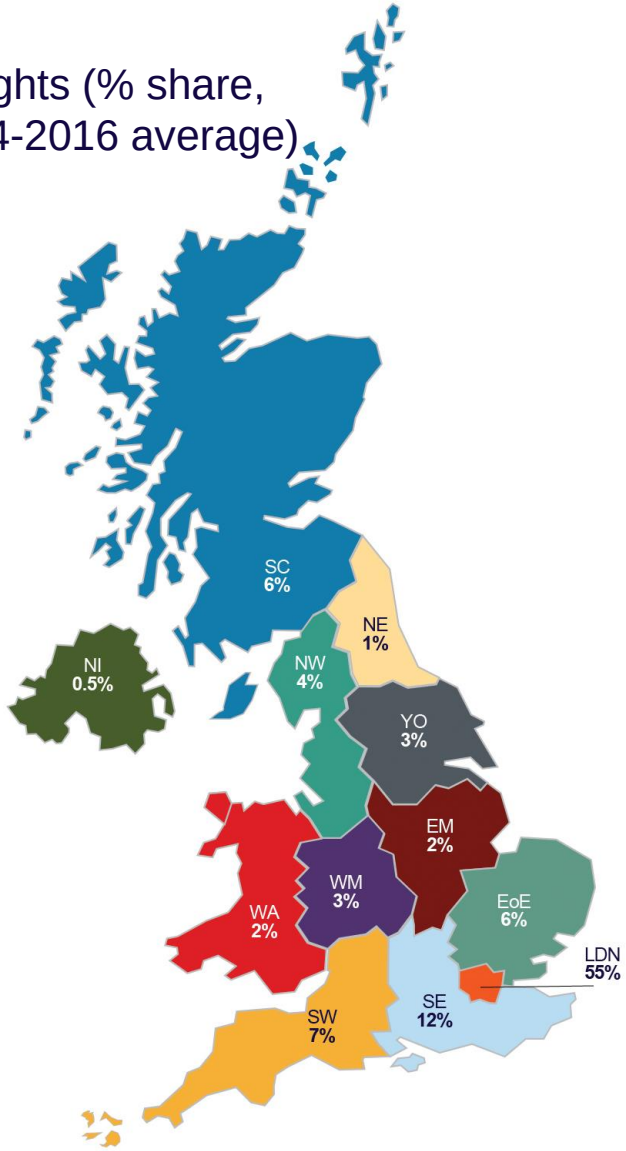
1.1 Key statistics: regional spread

Visits to the UK in (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	13,172	1,847
Scotland (SC)	806	94
Wales (WA)	325	30
Northern Ireland (NI)	64	3
London (LDN)	7,234	1,201
North East (NE)	101	9
North West (NW)	479	74
Yorkshire (YO)	340	40
West Midlands (WM)	351	55
East Midlands (EM)	204	38
East of England (EoE)	760	94
South West (SW)	865	92
South East (SE)	1,632	200
Nil nights (Nil)	N/A	46

Source: International Passenger Survey by ONS

Nights (% share, 2014-2016 average)

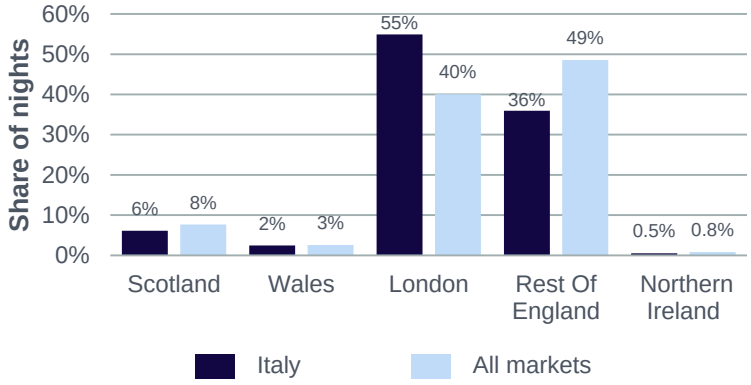


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited

Town	Visits (000s, 2014-2016 average)
London	1,201
Edinburgh	62
Manchester	38
Cambridge	26
Bristol	25

Regional spread (2014-2016)

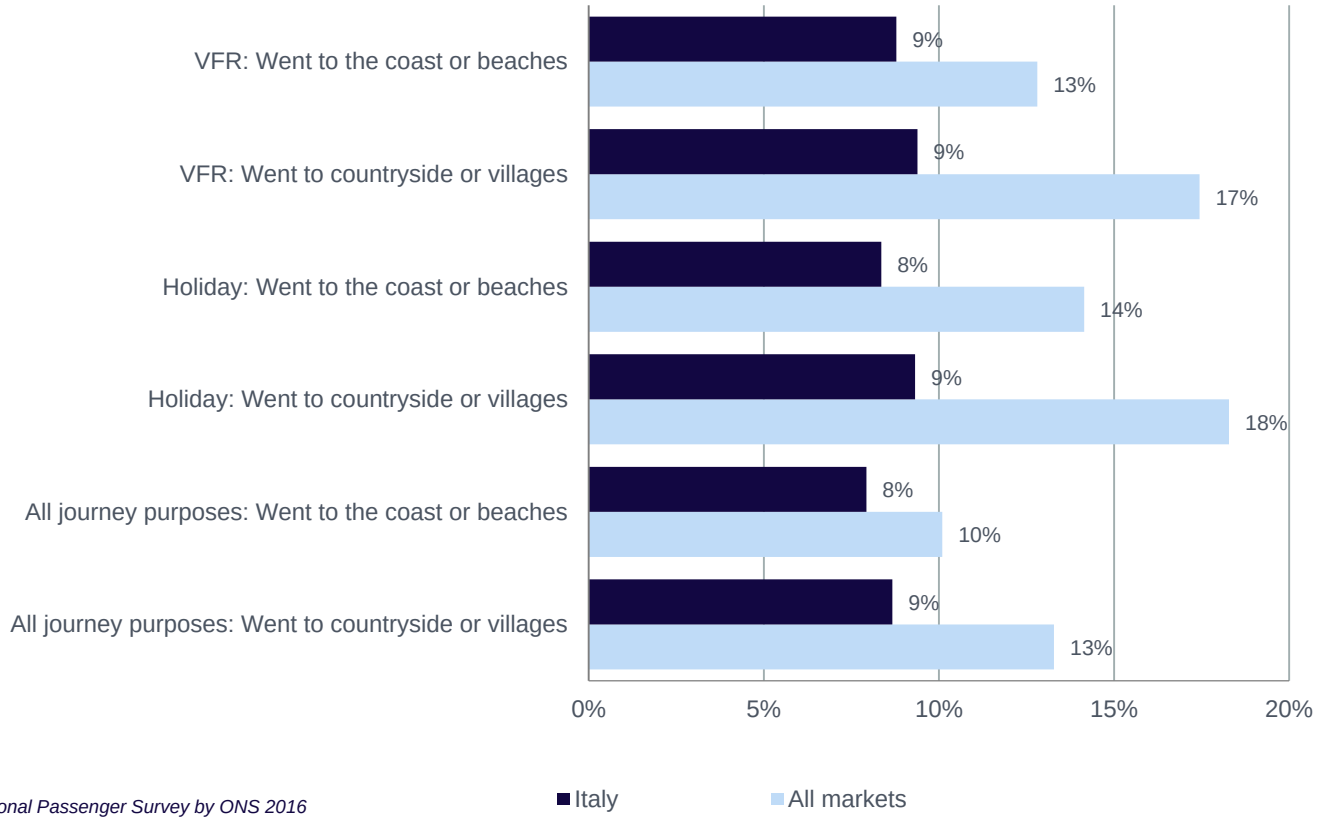


Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

- London is the leading destination for a trip to Britain, accounting for 55% of visitor nights, but South East, South West and Scotland are also popular based on the average nights spent in the UK 2014-2016.
- Italian visits have a below average propensity to feature rural and coastal areas of Britain.
- 5% of visits from Italy were bought as part of a package or an all-inclusive tour, slightly below the all market average. Most Italian visits to the UK were organised independently in 2016 (please note ONS definition of package holiday on page 16).
- Italian travellers have an above-average propensity to use public transport while they are in Britain, both in and outside of cities.
- The majority of Italian respondents buy their tickets for transport in Britain whilst they are here (with the exception of internal flights), especially transport in London, airport transfers and train tickets. Fewer transport services were pre-booked; airport transfers were the most likely to be booked before the trip with of visitors 39% stating they reserved them in advance.

1.1 Key statistics: visits to coast, countryside and villages

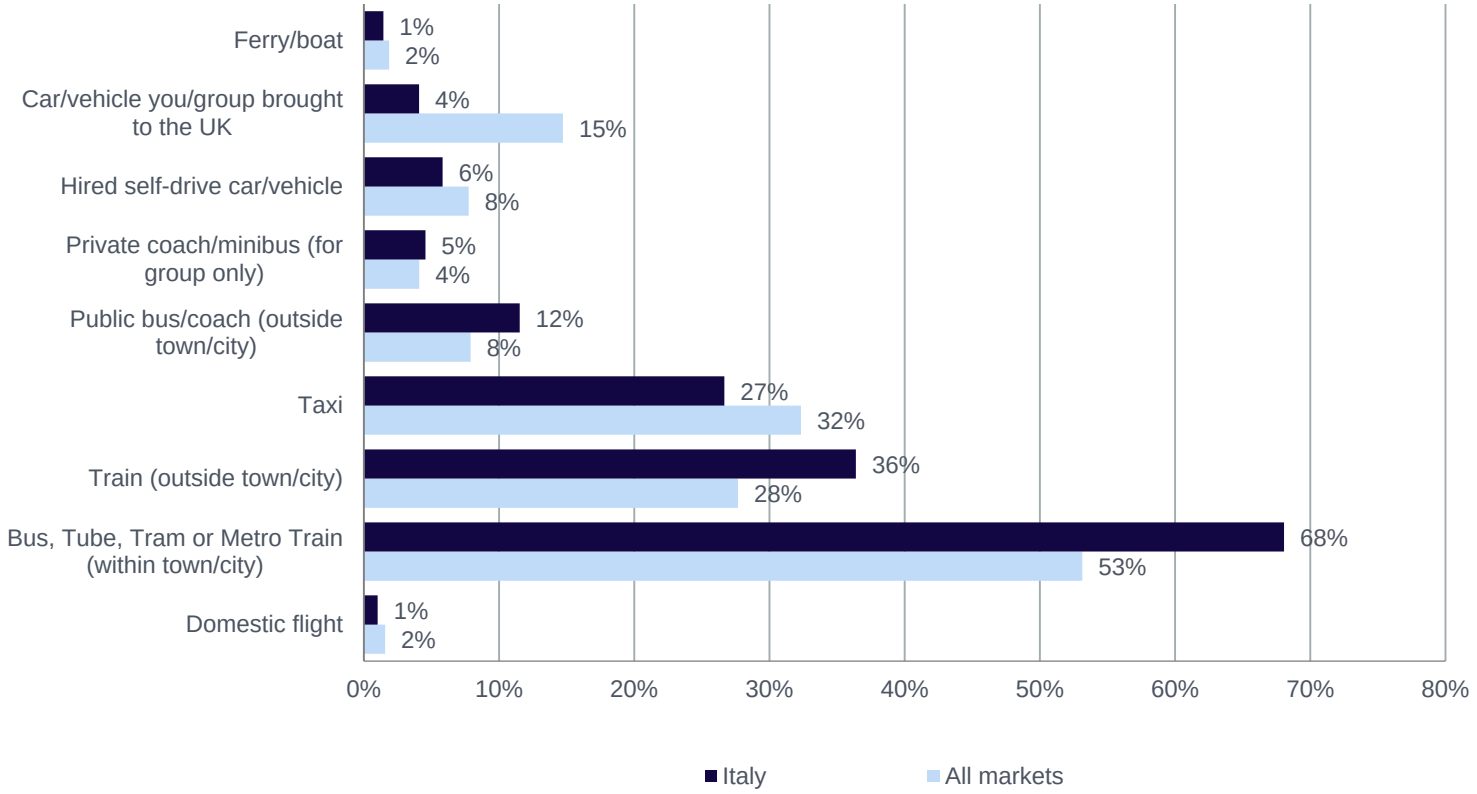
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.1 Key statistics: use of internal modes of transport

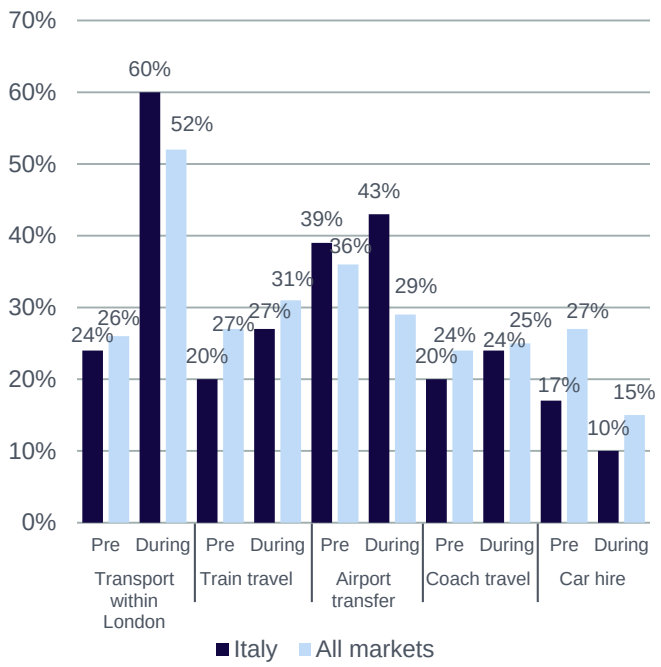
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS, 2013

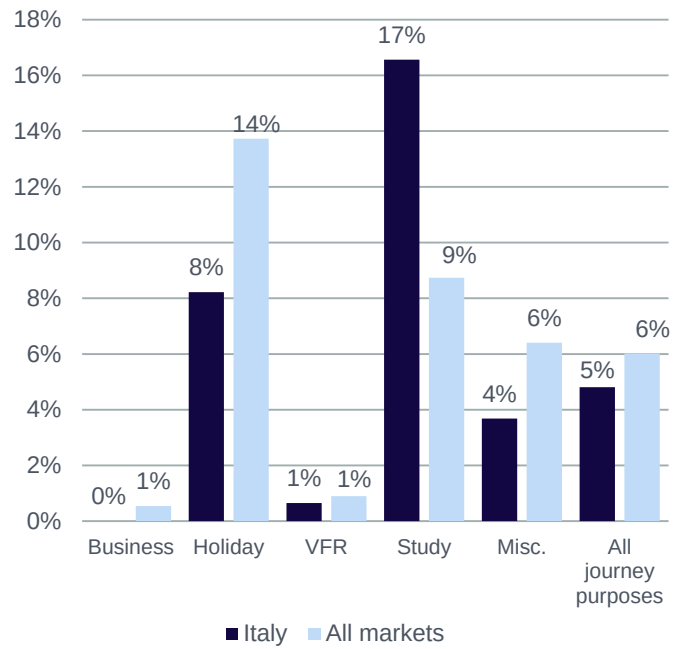
1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



International Passenger Survey by ONS, base size may be small, VisitBritain/IPSOS 2016, base: visitors

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.

1.2 Visitor demographics

Visitor characteristics

- Around three quarters of business visitors from Italy are male.
- Almost three in five holiday visitors (excl. UK nationals) are making a repeat visit to Britain.
- Most visits from Italy to the UK were made by Italian nationals (91%) and 4% by British nationals in 2016.
- 93% of departing Italian travellers are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.
- 88% of departing Italians felt ‘Very‘ or ‘Extremely‘ welcome in Britain.

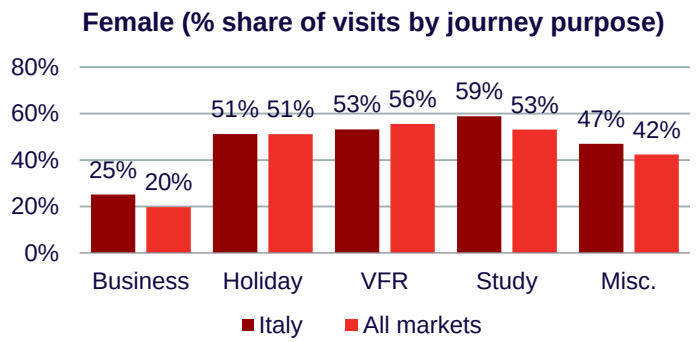
93%
‘Very’ or
‘Extremely’ likely
to recommend Britain
in 2016

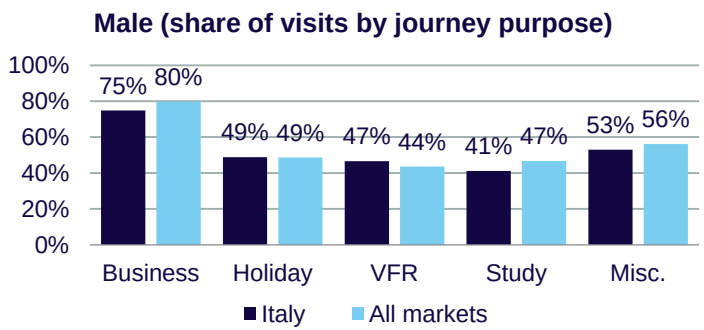
Source: International Passenger Survey by ONS, CAA 2016 (leisure visitors)

1.2 Visitor demographics: gender and age groups

Visitor demographics:

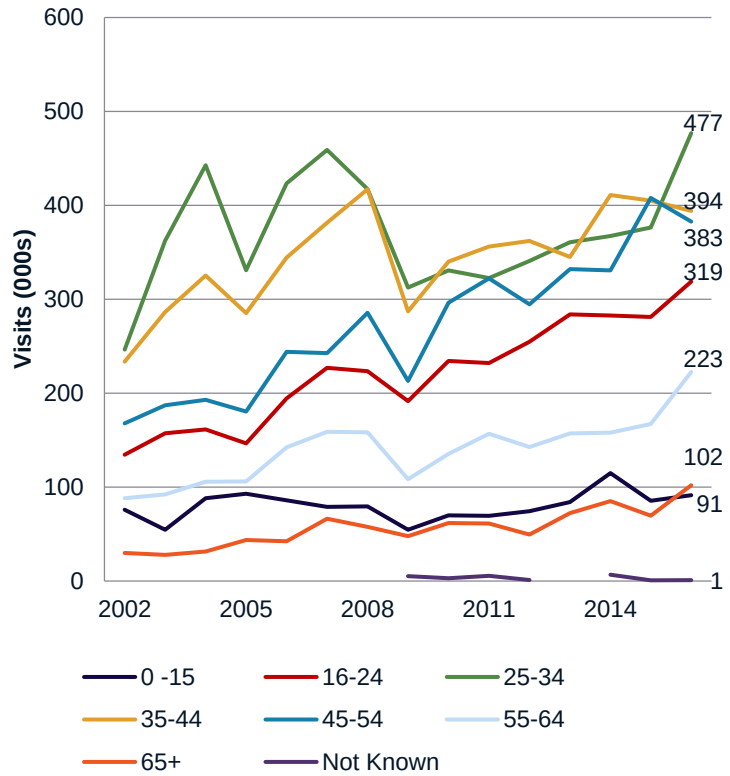
gender ratio of visits from Italy:
47% female, 53% male





Source: International Passenger Survey by ONS, base may be small

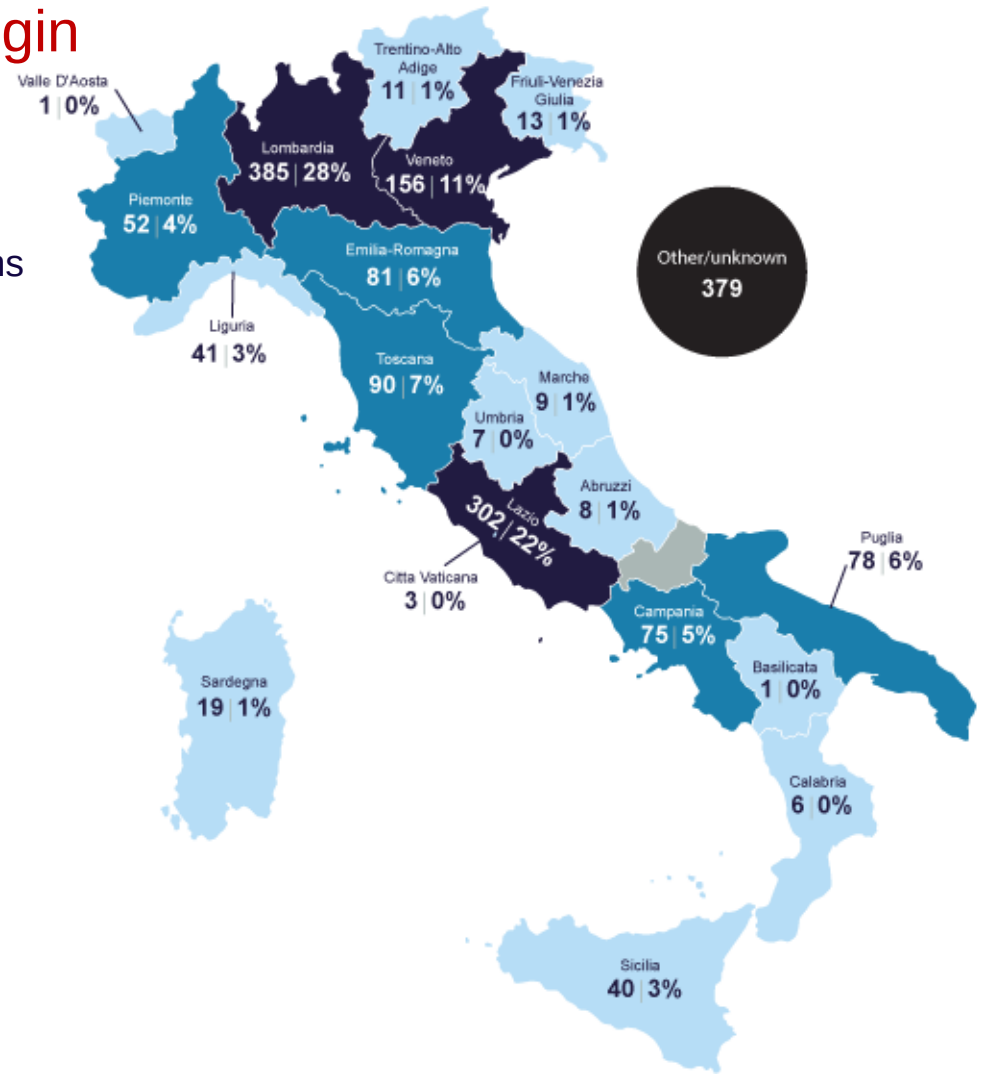
Age group trend



1.2 Visitor demographics: origin

Visits to the UK in (000) 2014

- The largest proportion of Italian visitors who came to the UK reside in the regions of Lombardia, Lazio and Venice.
- The largest urban areas in terms of inhabitants are Rome, Milan, Naples, Turin, Palermo and Bergamo.



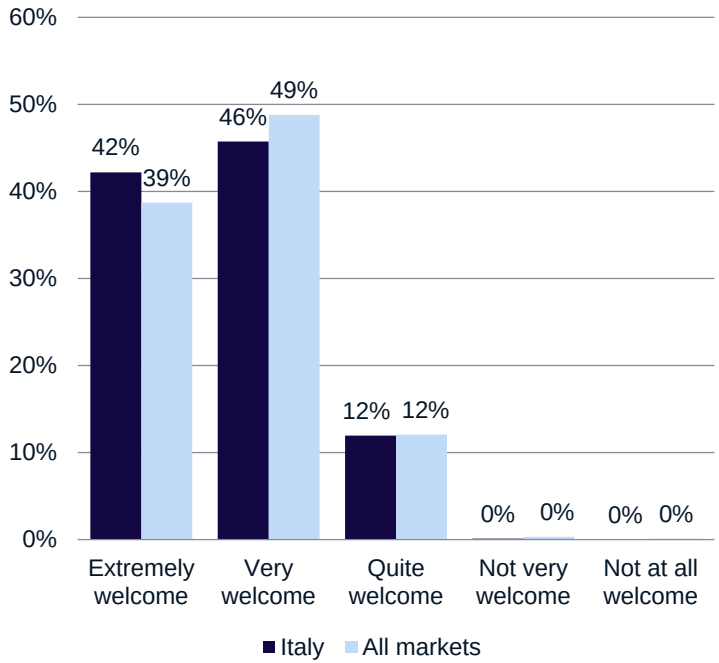
Visits in 000s | % share of visits

- High
- Medium
- Low

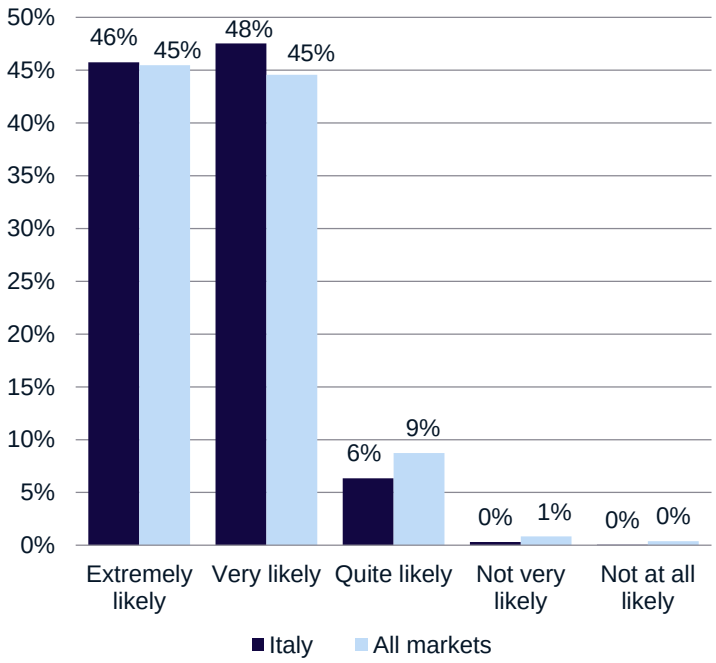
Source: International Passenger Survey by ONS, CIA World Factbook 2017

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016, asked to leisure visitors

1.3 Britain and competitors

Market size, share and growth potential

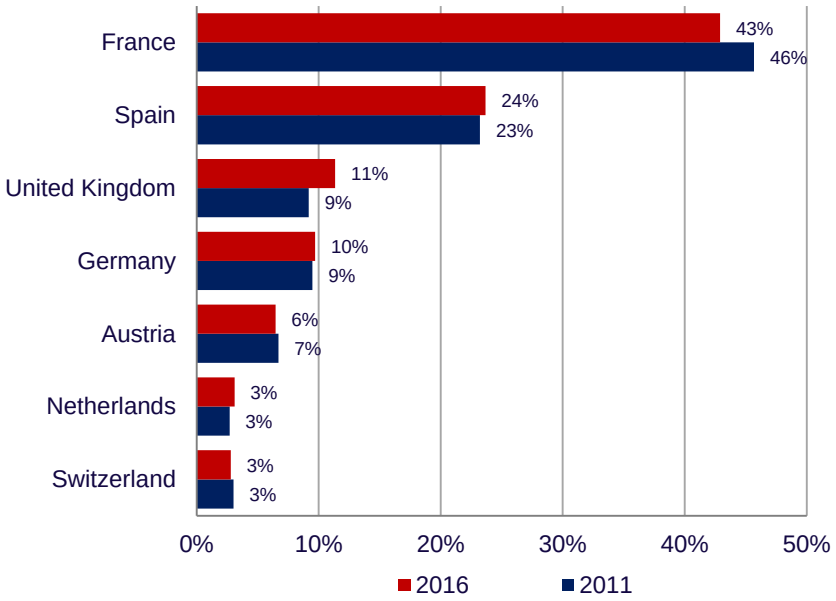
- Britain was the 3rd most visited destination by Italian travellers in 2016, behind France and Spain, ahead of Germany.
- Forecasts suggest there is the potential for growth in the number of visits to Britain during the next decade.
- Of those who came to Britain for a holiday, France was the most considered alternative destination whilst about one in four decided to travel to Britain without looking into alternative destinations.
- 83% of the more than 66 million overnight trips of the resident population in Italy were taken to domestic destinations in 2016.

Britain ranks 3rd
for Italian outbound destinations by volume

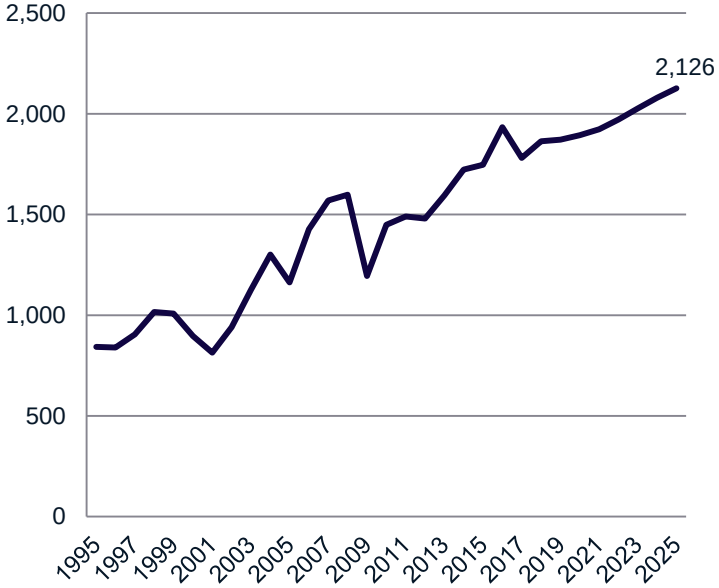
Source: Oxford Economics (outbound overnight trips), VisitBritain/IPSOS 2016, Istat 2016

1.3 Britain and competitors

Britain's market share of Italian visits among competitor set



Historic and potential visits to Britain (000s)

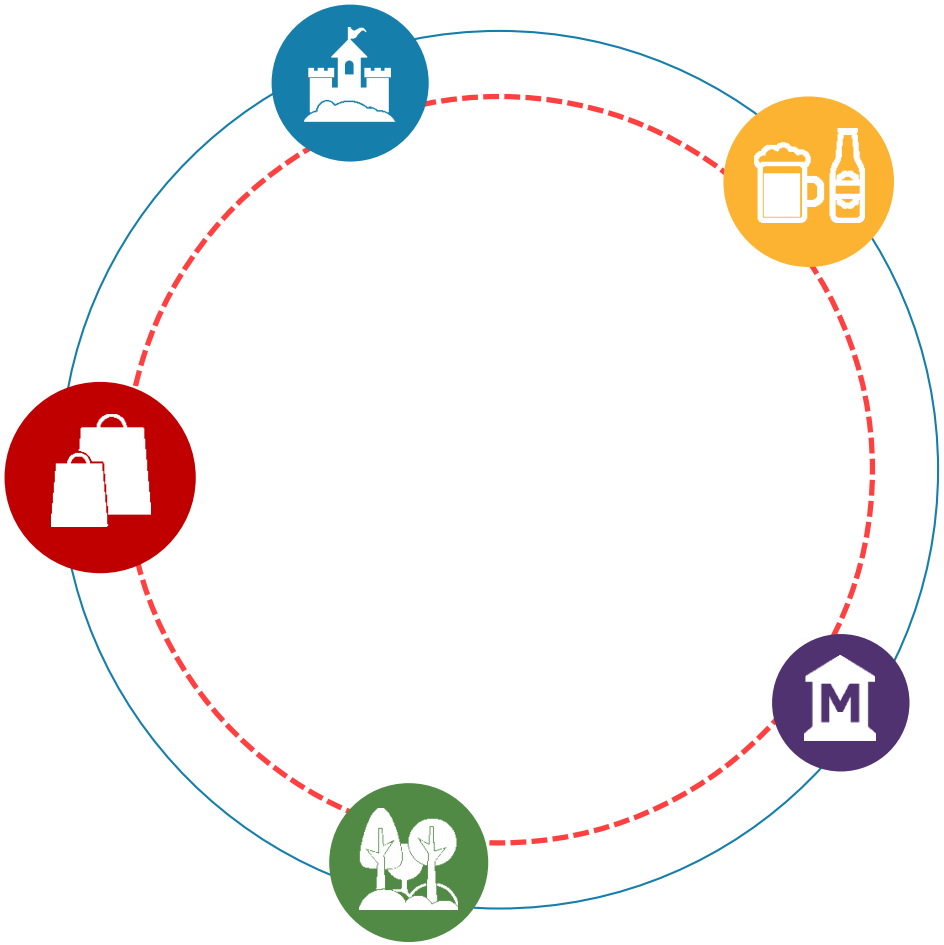


Source: Oxford Economics (outbound overnight trips)

1.4 Inbound activities

Inbound Britain activities

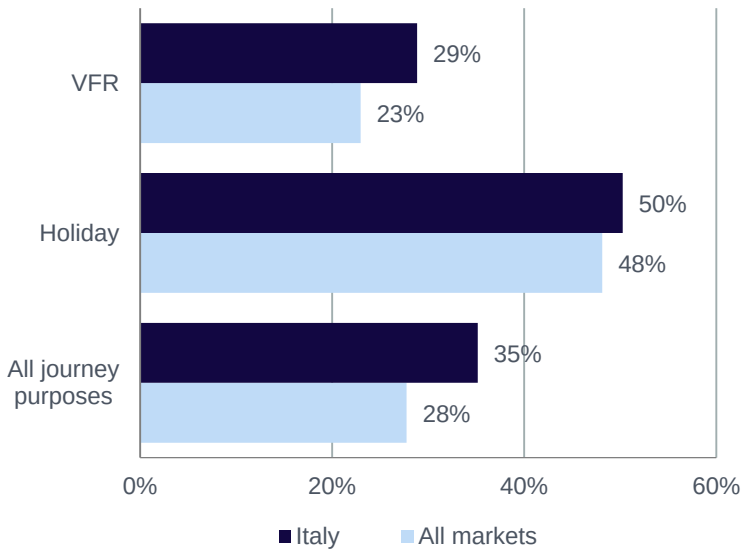
- Most Italian visitors like to dine in a restaurant or visit a pub while in Britain.
- Shopping is a very popular activity which features in many Italian visits.
- Built heritage sites, and especially museums, are important attractions for many visitors from Italy.
- About half of holiday visits involve time in a park or garden.
- Walking in the countryside is popular with one in five Italian holiday or VFR visitors.
- About 13,000 visits per annum feature time watching football.
- Italian visitors have a below average propensity to visit the performing arts during their stay in Britain.



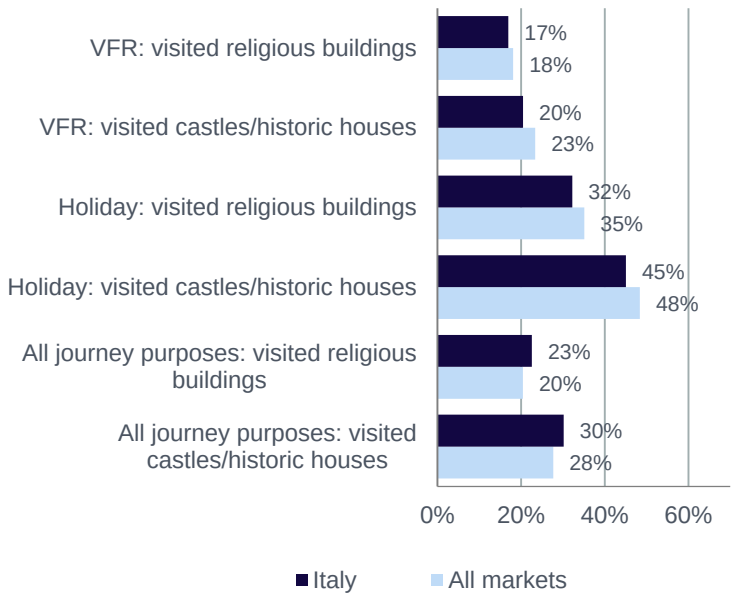
Source: International Passenger Survey by ONS (rankings based on 2011 and 2016)

1.4 Inbound activities

Propensity to visit museums and galleries



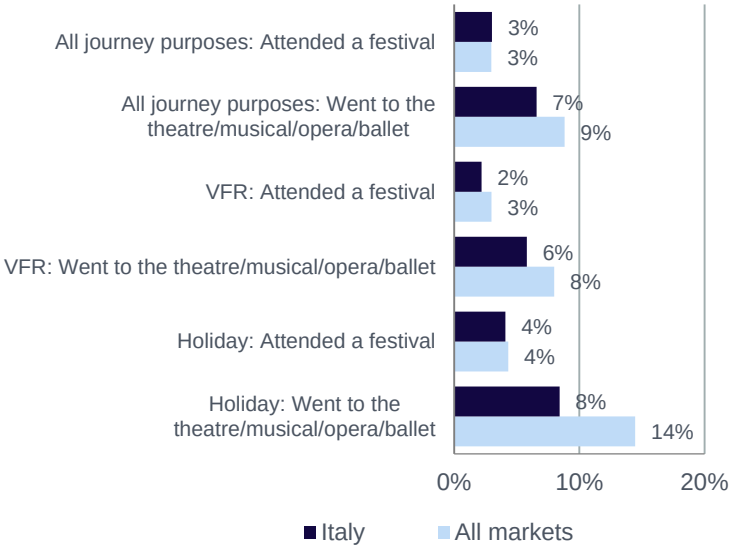
Propensity to visit built heritage sites



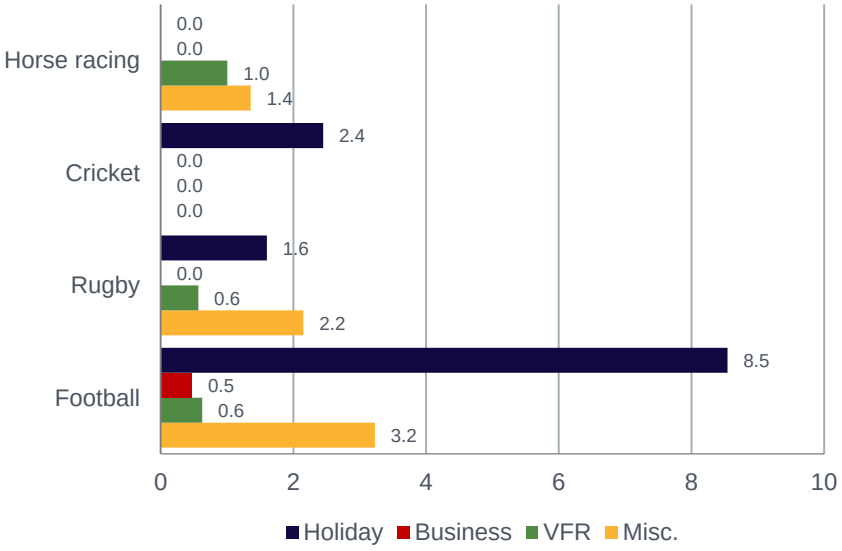
Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

Propensity to attend the performing arts



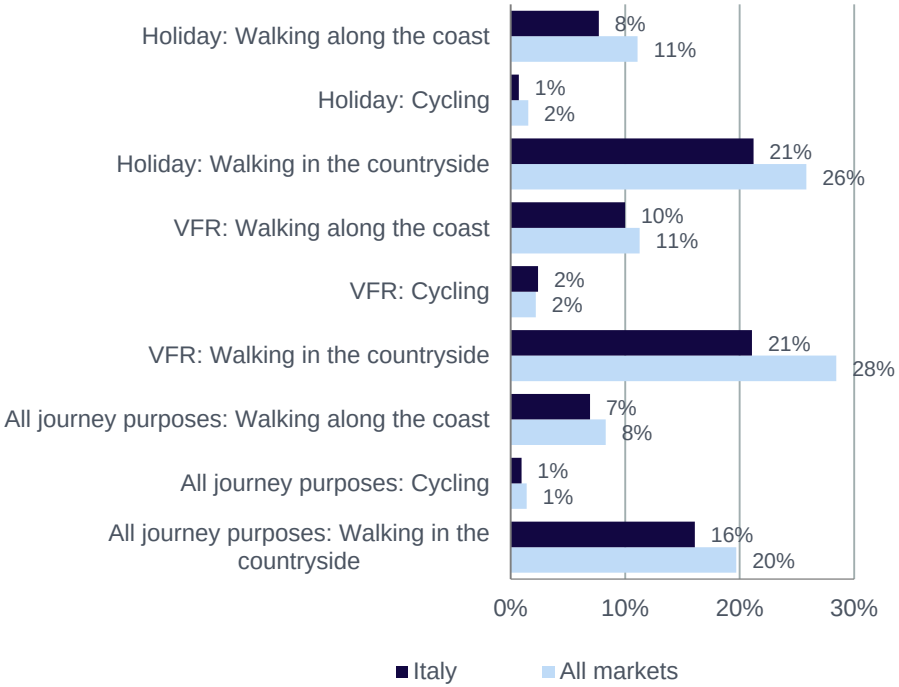
Number who went to watch sport live during trip (000s)



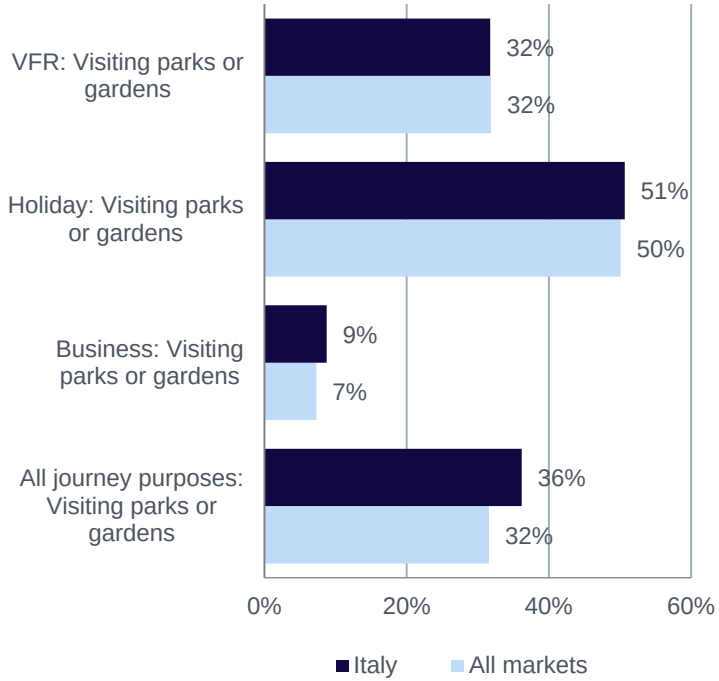
Source: International Passenger Survey by ONS 2011 and 2016

1.4 Inbound activities

Propensity to go for a walk or cycle



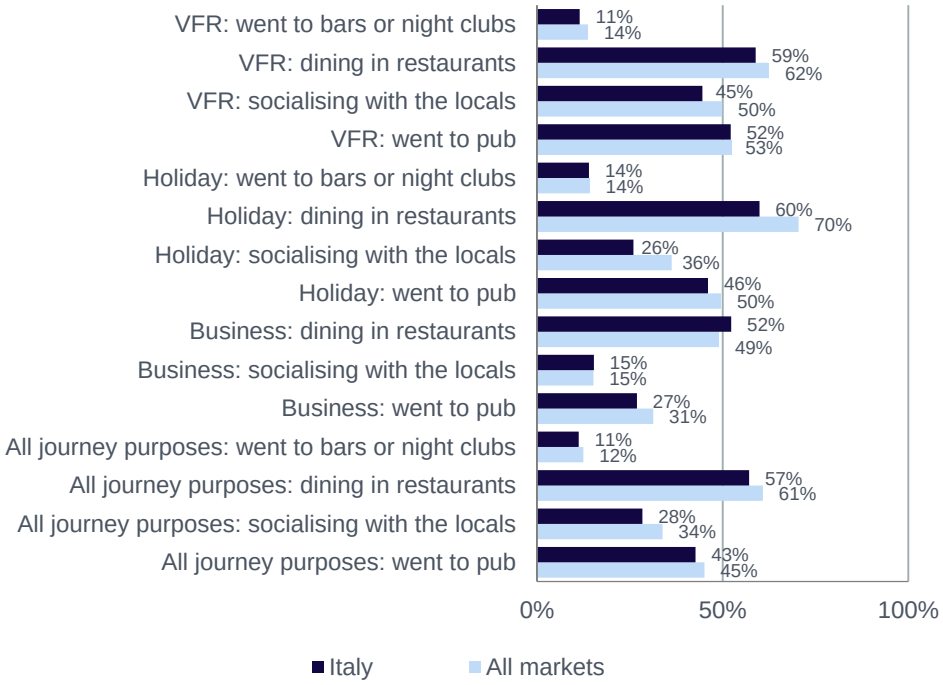
Propensity to visit a park or garden



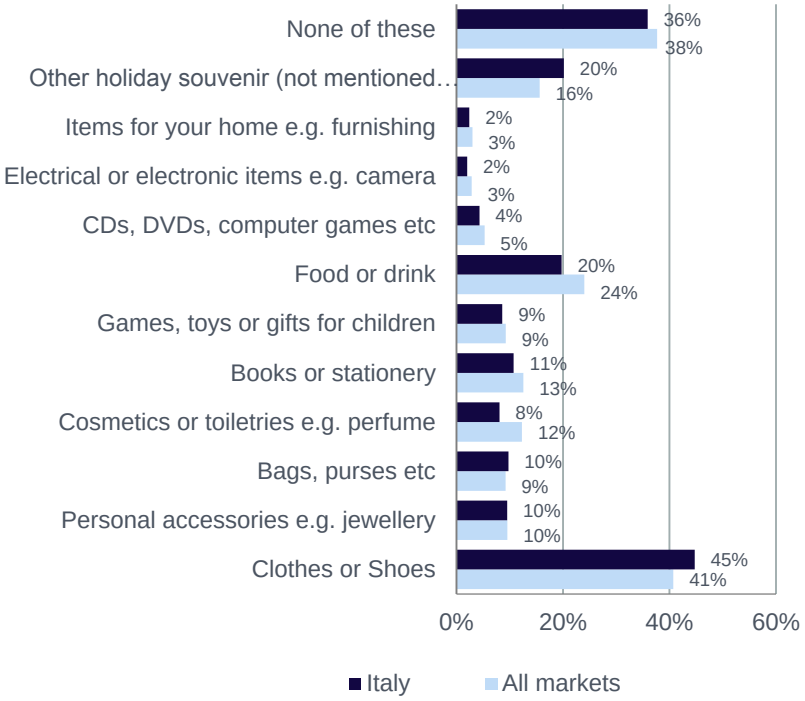
Source: International Passenger Survey by ONS 2007, 2010 and 2016

1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals



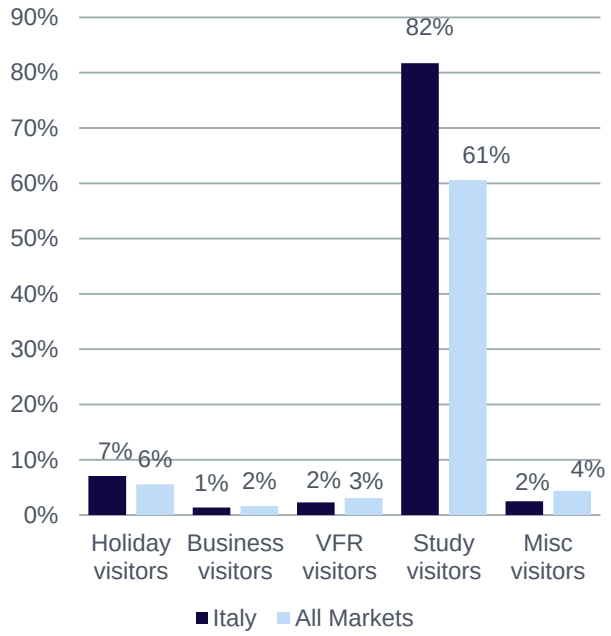
Propensity to purchase selected items (%)



Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013

1.4 Inbound activities

Propensity for visit to include an English language course (%)



Source: International Passenger Survey by ONS 2013

Chapter 2:

Understanding the market

2.Understanding the market

Chapter summary

- Italy has a population of about 61 million.
- Whilst one in three Italians did not take overnight trips away from home in the past year (higher than the European average), it is very common for the majority to go on more than one such trip, indicating that travel is important to them.
- More than one in three Italian holiday visitors tend to start thinking about their trip to Britain more than half a year in advance.
- Only few Italian bookings are made more than half a year in advance. 40% book between three and six months prior to departure but half of holiday bookings of a trip to Britain were made within two months prior.
- Friends, family and colleagues are the most influencial source when choosing a holiday destination.
- Italians rate Britain highly for its contemporary culture, vibrant cities, sport, historic buildings and monuments and cultural heritage. Britain's strengths include the perception that it is a good destination to see 'famous sites' and 'lots of history'.

Cultural attractions

Most important draw for Italian leisure visitors for choosing Britain

Source: Oxford Economcis, VisitBritain/IPSOS 2016, GfK Anholt Nation Brands Index 2016, Flash Eurobarometer 432 by EC 2016

2.1 Structural drivers

Demographics & society

- Population of about 61 million.
- Italy is a republic.
- There are 15 regions: Abruzzo, Basilicata, Calabria, Campania, Emilia-Romagna, Lazio, Liguria, Lombardia, Marche, Molise, Piemonte, Puglia, Toscana, Umbria and Veneto.
- There are also 5 autonomous regions: Friuli-Venezia Giulia, Sardegna, Sicilia, Trentino-Alto Adige and Valle d'Aosta.
- The population is fairly evenly distributed in most parts of the country with coastal areas, the Po River Valley and urban areas being more densly populated.
- The official language is Italian. German, French and Slovene are also spoken in some parts of the country. English is taught as a foreign language in school.
- Italian employees receive an average of 30 days annual leave.

60.7m
Italian population

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2016 estimate
Total population	60,747,000
Net No. migrants per 1,000 population	4
Average annual rate of population change in 2015 - 2020	0.1%

Economic indicators

Indicator	2016	2017	2018
Real GDP	1.1%	1.6%	1.4%
Consumer spending	1.5%	1.4%	1.2%
Unemployment rate	11.7%	11.2%	10.8%
Average earnings	0.8%	0.5%	1.2%
Consumer prices	-0.1%	1.3%	0.9%

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: general market overview

General market conditions

- Italy was Britain's 7th largest source market in terms of visits and also 7th most valuable for visitor spending in 2016.
- The Italian economy shows signs of recovery and GDP growth is thus forecasted at 1.6% in 2017. The risk of upcoming legislative elections potentially happening in early 2018 could create some time of increased uncertainty. (Oxford Economics)

Key demographic and economic data

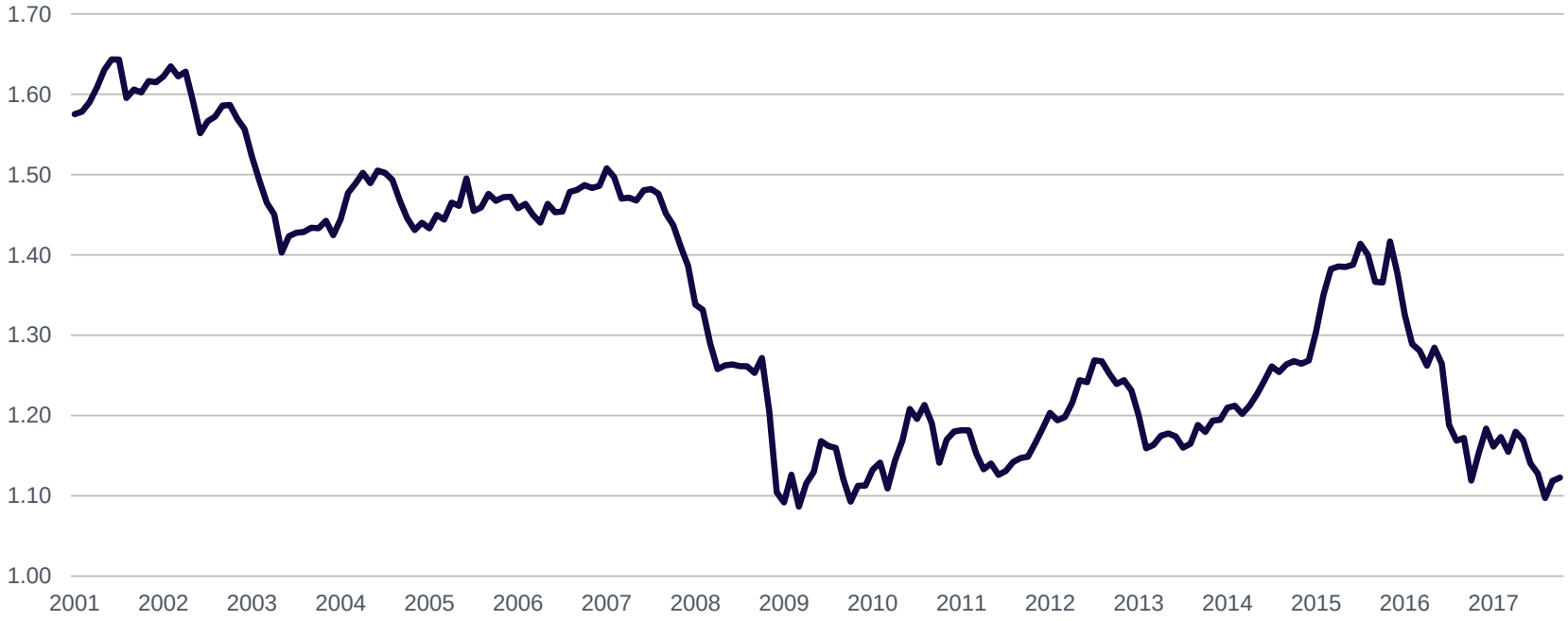
Measure (2016 data)	Italy	Eurozone
Population (m)	60.7	336.8
GDP per capita PPP (US$)	33,555	38,071
Annual average GDP growth over past decade (%)	-0.6	0.6
Annual average GDP growth in 2016 (%)	1.1	1.7

Source: Oxford Economics, Capgemini World Wealth Report 2017, CIA World Factbook 2017

- The country has a population of about 61 million with a median age of 46 – the Italian population is ageing and currently the one with the third highest median age in Europe, sixth highest globally.
- Most people in Italy are well-educated and enjoy a good standard of living; however, real GDP per capita in purchasing power parity terms is around US$34,000, lower than the Eurozone average.
- According to the Capgemini World Wealth Report there were 252,000 High Net Worth Individuals (HNWI) resident in Italy in 2016, these being people with investible assets worth more than $1 million, representing an increase of 10% on 2015. This represents the tenth largest HNWI population in the world.

2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source. Bank of England

2.2 Consumer trends

- Most overnight trips taken by the Italian resident population are trips within Italy to domestic destinations. Most of the overnight travel abroad is to other countries in Europe.
- Short breaks of up to three nights, which account for 29 million Italian overnight trips, in particular saw strong growth in 2016.
- The sharing economy in Italy is growing in all areas of life including tourism and transport as well as culture. In 2016, there were 206 sharing economy platforms (incl. 58 for crowdfunding). This is an increase of 11% on 2015.
- The number of “mTravellers“, i.e. those using their smartphone to plan or book trips is steadily increasing in Italy: according to data gathered by Amadeus there are 1.3 million “mTravellers“ in Italy, up 125% on 2014 and estimates show the value of touristic products and services transacted via smartphones is €40million.

70%

of Italians took at least one overnight trip away from home.

Sources: Istat 2016, Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?, VisitBritain/IPSOS 2016, StartupItalia! ‘Tutti i numeri della sharing economy in Italia nel 2016’, Italia Online ‘Turismo e smartphone: il 42% dei viaggiatori è ’mobile’

2.2 Consumer trends: overall travel trends

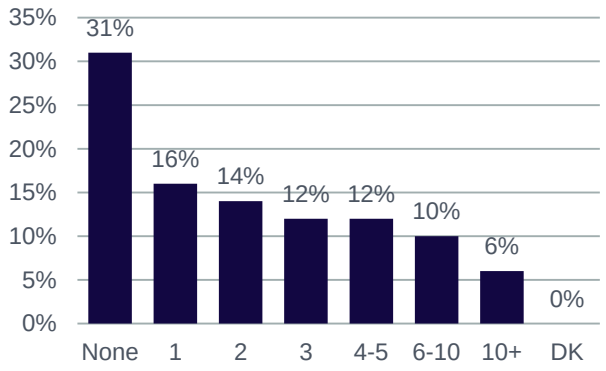
Travel trends

- In 2016, the resident population in Italy took an more than an estimated 66 million overnight trips (an increase of 14% on 2015), totalling at more than 355 million nights away from home.
- Most of these overnight trips were taken for leisure (90%). One in ten of the overnight trips had a business purpose. About 45% of trips were considered as 'long holidays' of four or more nights.
- Short breaks of up to three nights made up an estimated 29 million trips and showed strong year-on-year growth in 2016, up 21% on 2015. 'Long holidays' accounted for almost 30 million overnight trips and also increased, up 11% on 2015.
- 42% of the overnight trips by the Italian resident population are made in summer. About one in three take a holiday in summer (up 14% compared to summer 2015). The average duration of a summer holiday is 8 nights, almost double the average length of trips taken at other times of the year.
- 83% of the overnight trips were taken within Italy to domestic destinations. The largest number of overnight trips abroad (17%) were taken to another country of the European Union. France and Spain were the most visited countries in 2016 (13% and 11% respectively).
- Spain continues to be the preferred destination for long holidays (12%), France for short holidays (22%). Among trips to destinations outside of Europe, the U.S. is the most popular holiday destination (16%), while China receives the largest share of business visits (8%).

Source: Istat 2016

2.2 Consumer trends: motivation and attitudes to holidays

Number of overnight trips away from home for all journey purposes (%)



- Whilst about one in three Italians did not take overnight trips away from home (above European average) it is very common for the majority to go on more than one such trip.

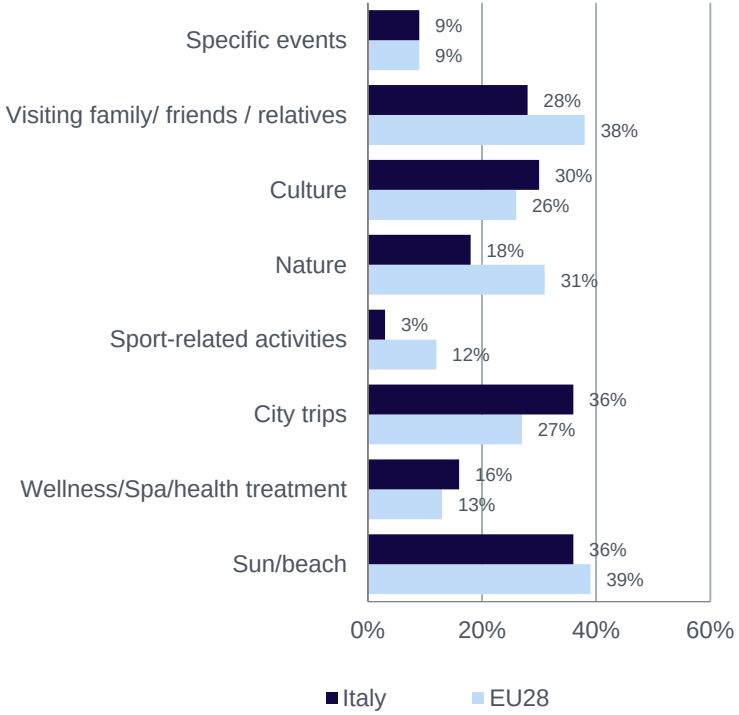
Motivation and attitudes to holidays

- Whilst more than one in three Italians said that they were unlikely to amend their holiday plans due to the economic situation (35%), almost one in four (23%) said that they go on holidays in 2016 but are likely to spend less (Flash Eurobarometer 432 by EC). This shows a higher impact than the European average.
- For Italians, top motivations to choose Britain as a holiday desitnation include: cultural attractions, somewhere where English is spoken, a place that is new to them, the ease of getting around, vibrant cities and a culture that is different from their own.
- The Italian traveller, in general, tends to be exigent and places high importance on good living. Authenticity of the travel experience and value for money are often important to them.

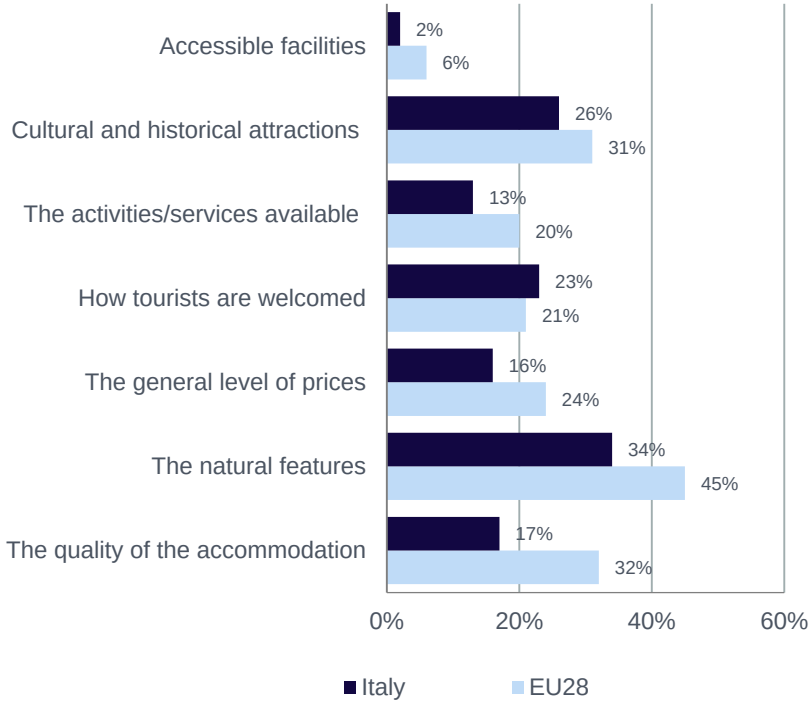
Sources: Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?, VisitBritain/IPSOS 2016

2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)



Reasons to return to the same destination for a holiday



- Amongst the main reasons for going on a holiday for Italian travellers are: sun/beach and city trips followed by culture and visiting family/friends/relatives. Nature is important to about one in five – below its share for other EU countries.
- Asked for reasons which would make them come back, about one in three Italians tend to value natural features. Cultural and historical attractions and the welcome are also found to be key for roughly one in four Italian respondents.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?

2.3 Booking and planning

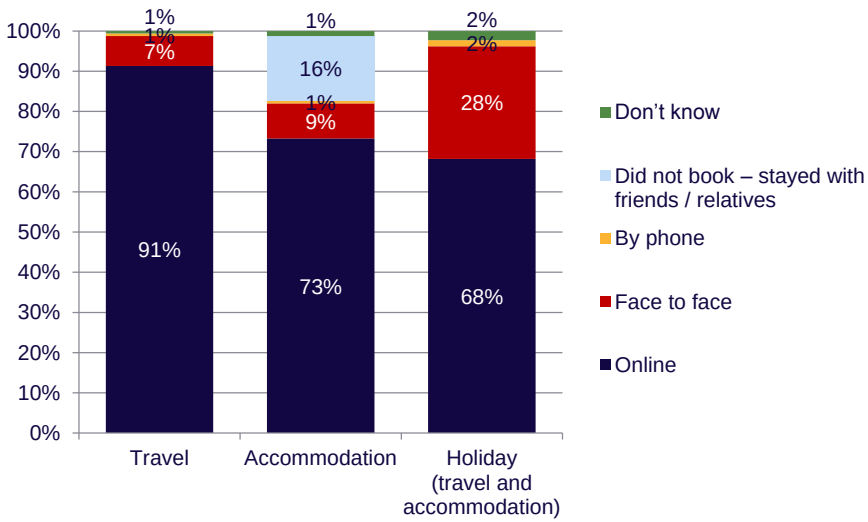
- More than one in three Italian visitors tend to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 40% did this three to six months in advance.
- 66% made their decision to travel to Britain at least three months before the actual journey (most commonly between three and six months ahead).
- 40% of bookings were made in the three to six month window before arrival in Britain. 30% of Italian visitors booked between one and two months in advance and 20% of Italian bookings happened within one month before the trip.
- Most bookings to Britain were made online. When travel and accommodation are booked together, more than one in four visitors made the booking face-to-face.

50%
of Italian visitors booked within two months of their arrival in Britain

Source: VisitBritain/IPSOS 2016

2.3 Booking and planning: booking channels and ticket sales

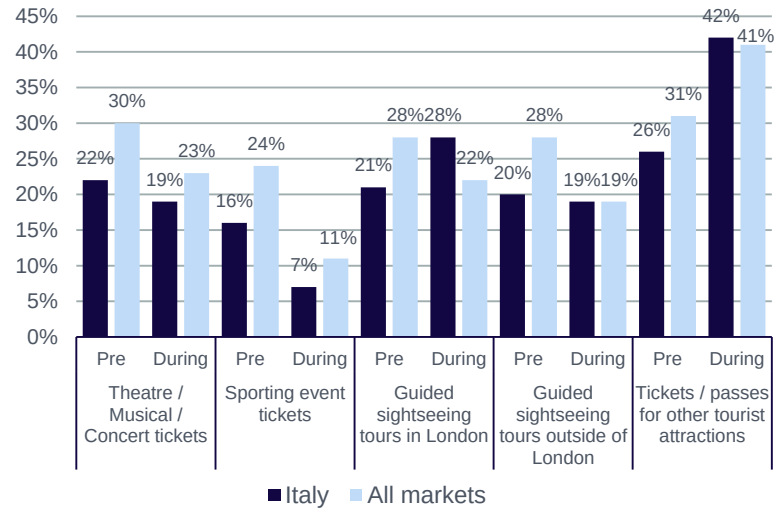
How trips to Britain were booked



- Italian visitors have become increasingly comfortable with booking their trips to Britain online, especially when they book travel (i.e. transport to Britain).
- 28% of bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined). This compares to the global average of 26%.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

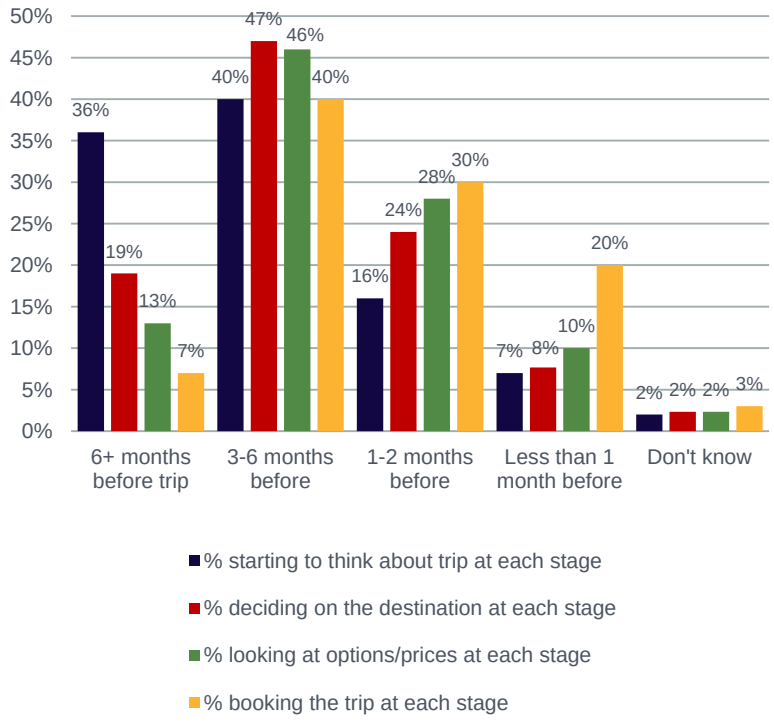
Propensity to make a purchase before or during trip



- Prior to trip: Across all categories, at least one in five Italian respondents made a booking prior to the trip to Britain, with the exception of sporting event tickets.
- During the trip: Tickets to guided sightseeing tours in London and tickets/passes for other tourist attractions were most likely to be bought during the trip.

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- More than one in three Italian visitors tend to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 40% did this three to six months in advance.
- 66% made their decision to travel to Britain at least three months prior to the actual journey (47% between three and six months prior to departure).
- Almost half of Italian visitors looked at options and prices between three and six months ahead of the trip and 40% made the booking in the same time frame. 28% were more spontaneous and looked at options between one and two months before the trip and 10% within one month.
- 30% booked their trip to Britain between one and two months before and 20% in the month leading up to the departure. Very few Italians make bookings more than 6 months in advance of a trip to Britain (7%) – this compares to the global average of 14%. A slight tendency to make the booking closer to the departure in the Italian market is evident.

2.4 Reaching the consumer

- The most influential source for destination choice for Italian visitors are friends, family and colleagues followed by websites providing traveller reviews, information on search engines and price comparison websites.
- Whilst online sources are very popular for researching and making a destination choice, still about one in four Italians consult travel guidebooks.
- More than 90% of the Italian population regularly watch TV. The radio audience has seen slight increases recently, also driven by web radio and podcasts.

Friends, family & colleagues

#1 Influence for the destination choice of the Italians

Source: VisitBritain/IPSOS 2016, Confidustria 2017, Radio Monitor

2.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- 93% of the Italian population regularly watch TV. This proportion is even higher for young people (aged 6-14) and seniors (aged 55-74).
- National public TV channels include RAI (main RAI1, RAI2, RAI3), Mediaset (Canale 5, Italia 1, Rete 4), La7
- Commercial TV landscape: Sky (116). Mediaset Premium (39 channels), Fox International Channels Italy (24), Discovery (21) and Netflix
- Dedicated travel programmes/Channels: Marco Polo TV, Alle Fade del Kilimangiaro (RAI3), Donnavventura (Rete 4), Il Cuoco Vagabondo (LaEffe), Dreams Road (RAI1), Easy Driver (RAI1)

Radio

- According to Radio Monitor, radio enjoys high popularity. The daily audience in Italy in 2016 is more than 35 million (+1% year-on-year), reaching almost 83% of Italians. The number of listeners who tune in for a short amount of time has especially increased. Often Italians listen to the radio in their car and the web radio and podcasts have also helped to increase its reach. Some channels have dedicated travel progammes, e.g. Radio Capital (Capital in the World).
- Rtl 102.5 is the leading channel (almost 7 million listeners on an average day)

Newspapers

- More than 40 million Italians read at least one publication per month. 8 in 10 adults read at least one paper title or digital edition.
- 17 million Italians (33%) read at least one newspaper daily.
- The main publishing houses are gathered in Milan (RCS for Il Corrierre della Sera) and Rome (La Repubblica)
- There are 21 national dailies and 44 regional dialies in Italy. The largest national newspapers include: Il Corriere della Sera (circulation: 472,883), La Repubblica (circulation: 455,672), Il Sole 24 Ore (circulation: 257,305), Quotidiano Nazionale (circulation: 369,254) and La Gazzetta dello Sport (circulation: 297,867).
- Almost all newspapers have weekly travel or lifestyle sections and/or supplements with travel content sourced internally (often the result of press visits) or produced by news agencies or freelance journalists.

Source: Istat 2016, Confindustria 2017, Radio Monitor

2.4 Reaching the consumer: magazines and online media

Magazines

- 40 weekly magazines registered (FIEG), including newspaper supplements (15m Italians read a weekly magazine, 28% of the adult population) and 56 monthly magazines (14m Italians read a monthly magazine, 26% of the adult population).
- Top 5 Italian travel magazines by circulation: Dove (circulation: 68,117), Bell'Europa (circulation: 41,500), Touring (circulation: 196,430), In Viaggio (circulation: 38,200), National Geographic Italia (circulation: 91,007).
- **Media trends:**
- Travel sections are still featured in the most-read female/male weekly and monthly magazines.
- The online editions continue to grow and are well regarded. The online versions of the main newspapers have dedicated travel sections.
- Lifestyle in general, including food&drink trends, are very fashionable and widely featured in many outlets.
- Niche themes such as cycling routes, green holidays, and wellbeing are also featured.
- The media landscape, especially the traditional one, is quite stable.

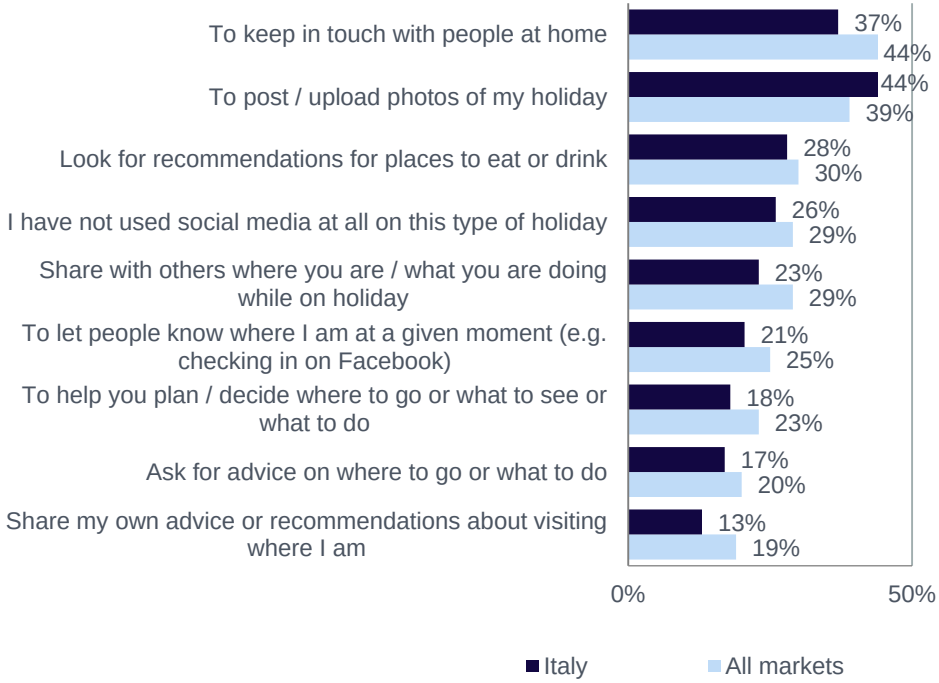
Online media

- Almost four in five Italians have access to the Internet. 66% of the population use it daily (a proportion which is increasing but still below the EU average of 71%). There are 31 million social media users as of 2016 (+11%), with strong growth of 17% year-on-year among mobile social media users, who now account for 47% of the whole population in Italy.
- Most Italians still browse the web via their desktop (63%), although the desktop share is decreasing with mobile web traffic on the rise (+44% YoY), now representing 31% of Internet use.
- The most popular social media platform is YouTube, with a market penetration of 57% (31% of Italians watch online videos at least once per day), followed by Facebook (55%), WhatsApp (48%), FB Messenger (33%) and Instagram (28%).
- Italians tend to use fewer social media platforms, but more frequently than the global average. 52% of the population logs in to social media platforms on a monthly basis (compared to a global average of 37%) and 74% of Facebook users connect to the platform every day (compared to a global average of 55%).

Source: We are social SRL 2017, FIEG (Federazione Italiana Editori Giornali), Eurostat 2016

2.4 Reaching the consumer: social media on holiday

Use of social media on holiday

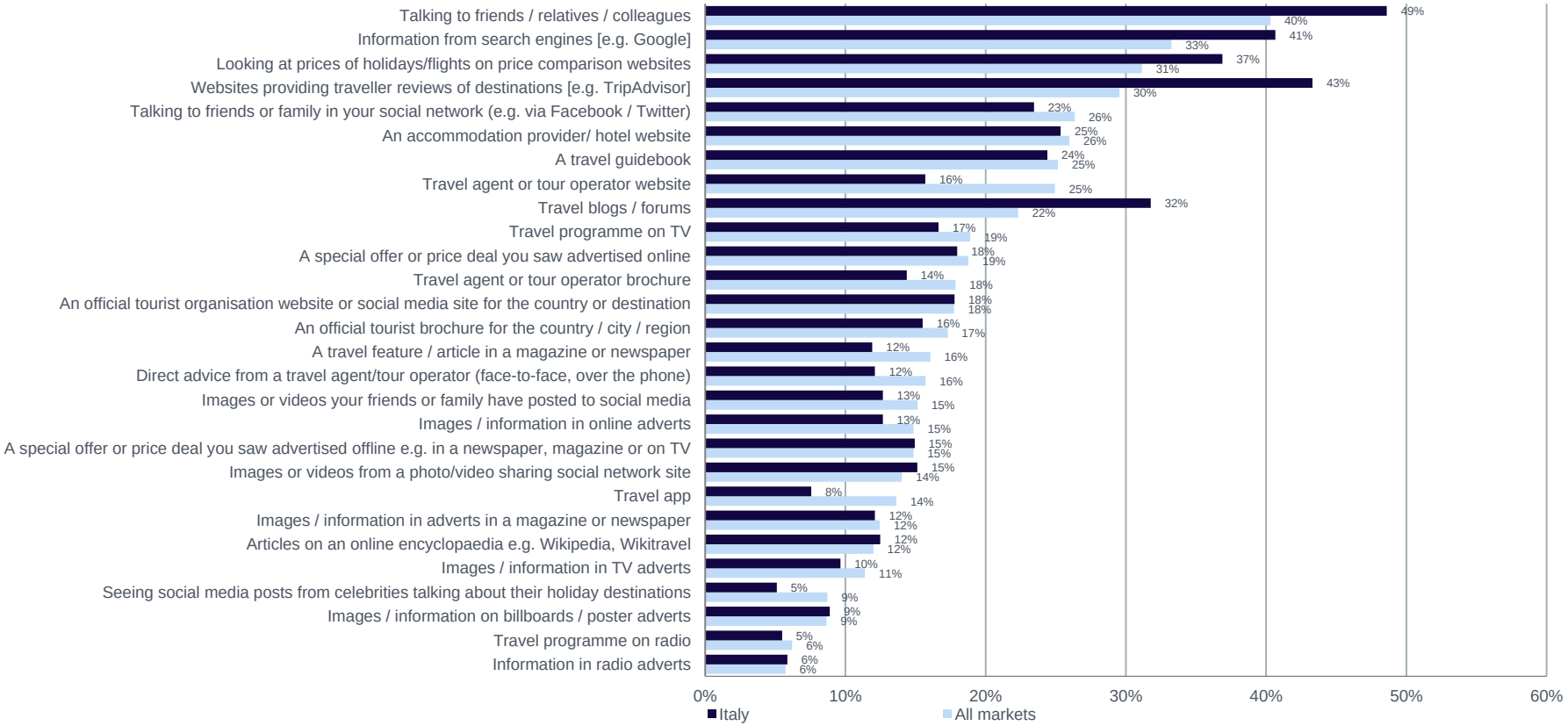


- The Italians are heavy users of social media and digitally savvy in general.
- 44% like to post/upload their holiday photos and 37% like to keep in touch with their people at home.
- 72% like to stay connected whilst they are on holiday and 79% regard a smartphone as essential whilst they are on holiday, above the all-market average of 73%.
- 86% of Italian travellers love to take photos when they are on holiday, above the all-market average of 78%.
- 81% of Italian travellers have shared holiday photos online or would like to do so and 70% have shared holiday video content or would like to do so. More Italian respondents than the average from other markets have already used location technology to find places to visit (65%) and a further 21% are interested in using it. 51% enjoy writing reviews on social media of places they have been to on holiday and 61% place trust in reviews on social media from other tourists; both of these are higher than in most European markets.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, *to enable meaningful comparisons)*

2.5 Perceptions of Britain

- The Italians rate Britain highly for contemporary culture, vibrant cities, sports and historic buildings and monuments, but less for welcome and scenic natural beauty; Britain was rated 14th and 27th out of fifty nations respectively on these two attributes in 2016.
- Museums, music, films and pop videos are the cultural products or services most strongly associated with Britain among the Italians.
- A trip to Britain would be expected to be 'Fascinating' and 'Educational' by the Italians.
- Australia and the USA are the destinations that the Italians consider the 'best place' for delivering the things they most want from a holiday destination.
- Areas of strength for Britain include being somewhere to see 'famous sites' and 'lots of history', offering 'lots of entertainment/nightlife' and the ease of getting around while very few consider Britain is the 'best place for 'food and drink'.
- Activities that appeal to potential Italian visitors include a visit to Buckingham Palace and Edinburgh castle.

Areas of strength for Britain:
Contemporary culture, vibrant cities, sport and heritage

Source: GfK Anholt Nation Brands Index 2013 and 2016, Arkenford 2013

2.5 Perceptions of Britain

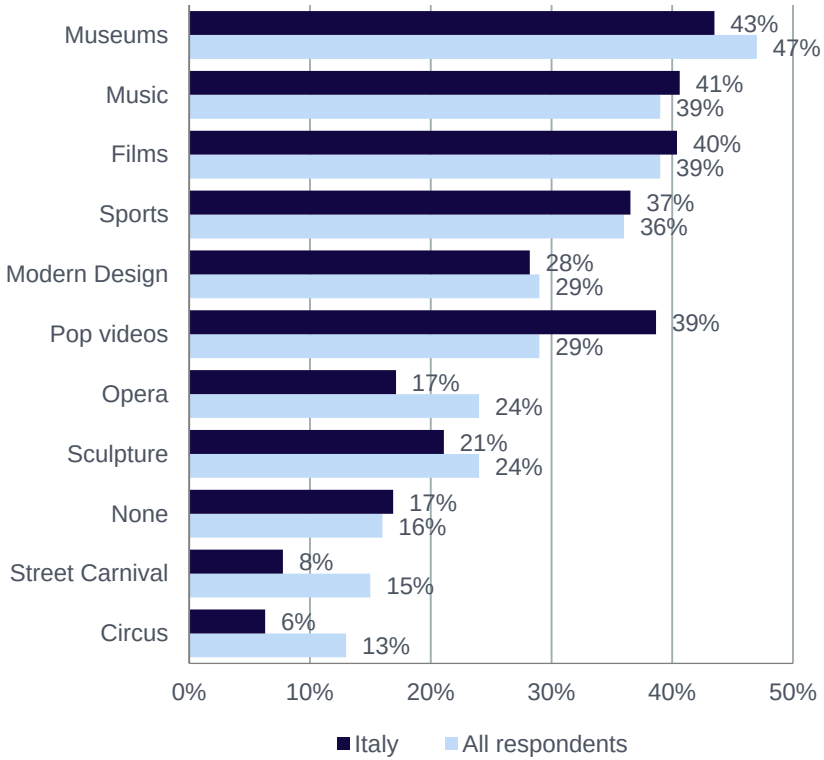
Britain's ranking (out of 50 nations)

Measure	Italian respondents	All respondents
Overall Nation Brand	3	3
Culture (overall)	4	5
The country has a rich cultural heritage	7	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	3	4
The country excels at sports	6	5
People (overall)	5	7
If I visited the country, the people would make me feel welcome	14	12
Tourism (overall)	4	5
Would like to visit the country if money was no object	4	5
The country is rich in natural beauty	27	24
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	3	4

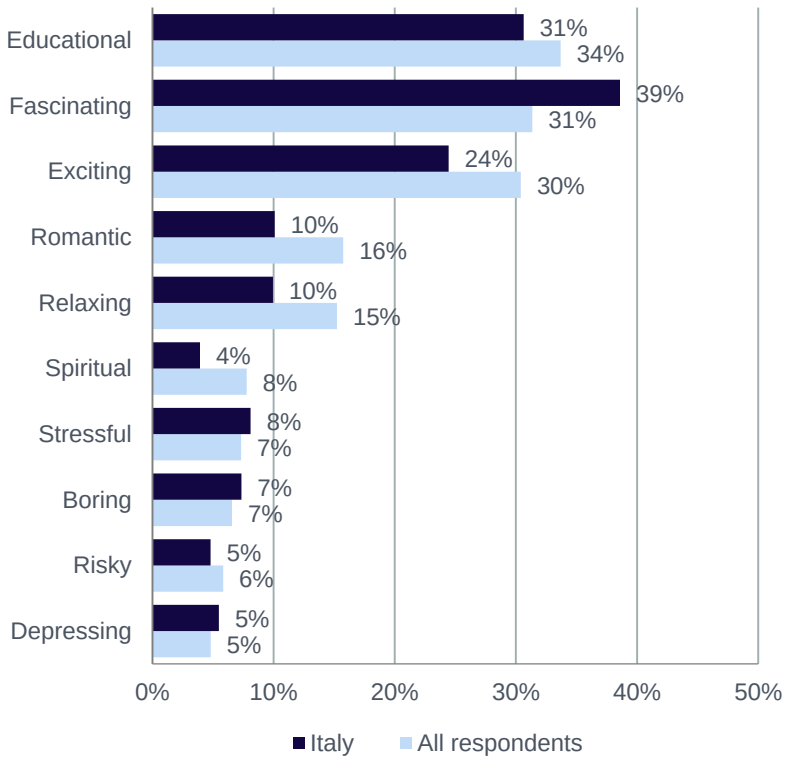
Source: GfK Anholt Nation Brands Index 2016

2.5 Perceptions of Britain

Cultural associations



Adjectives describing a potential trip to Britain



Source: GfK Anholt Nation Brands Index 2016

2.5 Perceptions of Britain

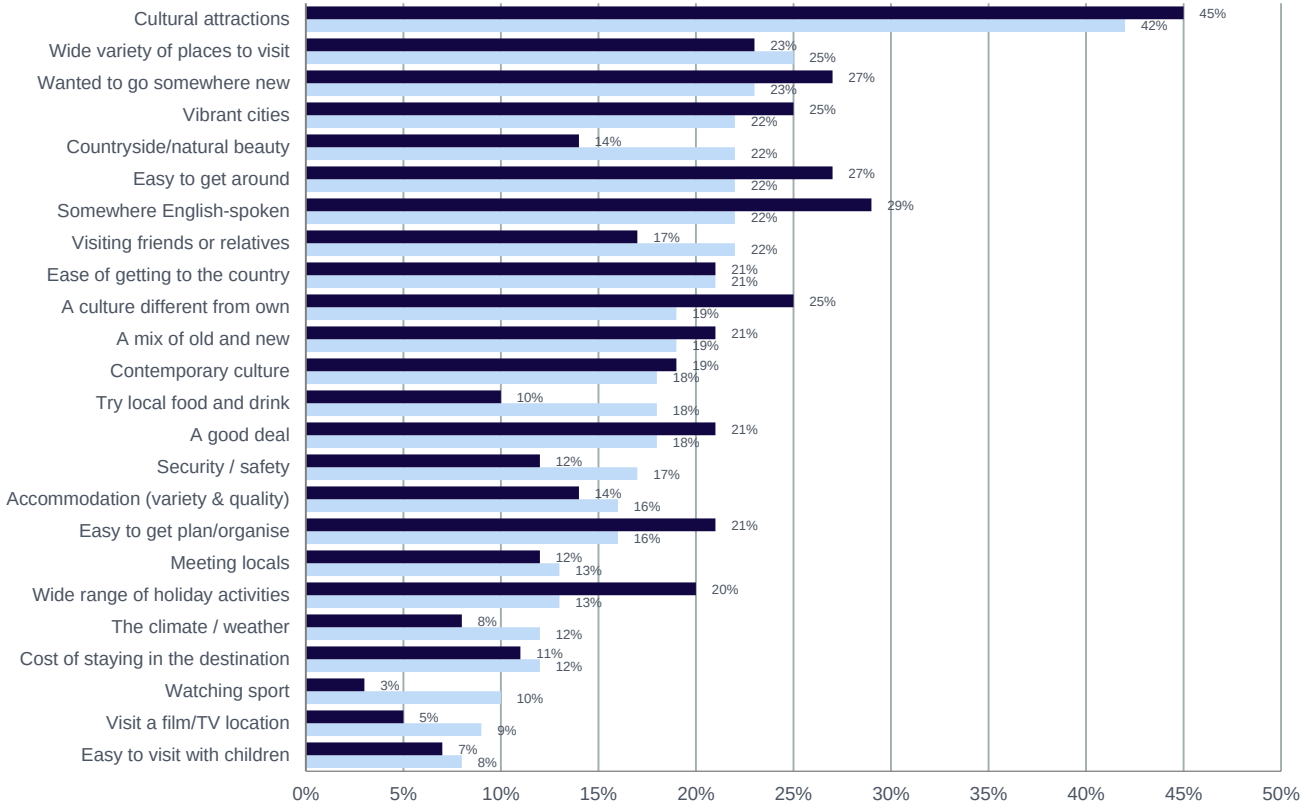
Holiday wants and % saying destination is best place for…

Importance		GB	FR	GE	AU	US	NL
6.09	Offers good value for money	13%	15%	14%	12%	13%	17%
6.02	Explore the place	14%	15%	11%	51%	41%	15%
6.00	Enjoy the beauty of the landscape	17%	27%	7%	60%	39%	15%
5.94	Do what I want when I want spontaneously	21%	14%	7%	28%	28%	19%
5.83	Have fun and laughter	20%	14%	9%	23%	32%	22%
5.81	The people are friendly and welcoming	16%	17%	13%	30%	25%	20%
5.80	Broaden my mind/ Stimulate my thinking	22%	19%	11%	47%	42%	18%
5.78	Enjoy peace & quiet	10%	16%	8%	36%	10%	16%
5.78	Enjoy local specialities (food and drink)	9%	35%	12%	13%	9%	8%
5.75	Chill/ slow down to a different pace of life	10%	15%	7%	27%	13%	14%
5.75	Experience things that are new to me	21%	14%	11%	62%	49%	15%
5.66	Do something the children would really enjoy	19%	33%	17%	28%	45%	16%
5.66	A good place to visit at any time of year	20%	27%	15%	31%	33%	17%
5.62	Visit a place with a lot of history/historic sites	38%	46%	20%	7%	15%	11%
5.62	Feel connected to nature	11%	11%	7%	64%	27%	11%
5.61	Experience activities/places with a wow factor	15%	16%	10%	52%	48%	10%
5.61	See world famous sites and places	43%	47%	18%	24%	51%	12%
5.52	It offers unique holiday experiences	19%	19%	12%	55%	50%	14%
5.46	Get off the beaten track	10%	9%	9%	38%	17%	12%
5.43	Have dedicated time with my other half	24%	41%	14%	28%	30%	18%
5.37	Provides a wide range of holiday experiences	23%	26%	14%	42%	53%	14%
5.34	Easy to get around by public transport	39%	31%	27%	15%	34%	23%
5.31	Be physically healthier	14%	19%	14%	29%	22%	16%
5.30	Meet the locals	16%	7%	3%	40%	19%	16%
5.18	Revisit places of nostalgic importance to me	24%	27%	13%	15%	25%	4%
5.14	Enjoy high quality food and drink (gourmet food)	11%	43%	10%	12%	10%	10%
5.07	Good shopping	26%	21%	11%	9%	36%	9%
4.87	Party	27%	19%	21%	30%	47%	25%
4.86	Visit places important to my family's history	12%	16%	9%	23%	17%	8%
4.84	Do something environmentally sustainable/ green	19%	12%	32%	44%	13%	36%
4.78	Feel special or spoilt	20%	21%	12%	22%	27%	16%
4.69	Meet and have fun with other tourists	13%	20%	8%	31%	37%	25%
4.47	Do something useful like volunteering to help on a project	18%	17%	13%	26%	15%	24%
4.43	To participate in an active pastime or sport	26%	16%	9%	29%	23%	11%
4.29	Go somewhere that provided lots of laid on entertainment/nightlife	43%	32%	28%	27%	53%	35%
4.24	Experience adrenalin filled adventures	16%	7%	5%	54%	61%	21%
3.87	Watch a sporting event	32%	27%	32%	22%	35%	19%
3.52	Fashionable destination	28%	31%	11%	27%	49%	12%

Source: VisitBritain/Arkenford 2013

2.5 Perceptions of Britain

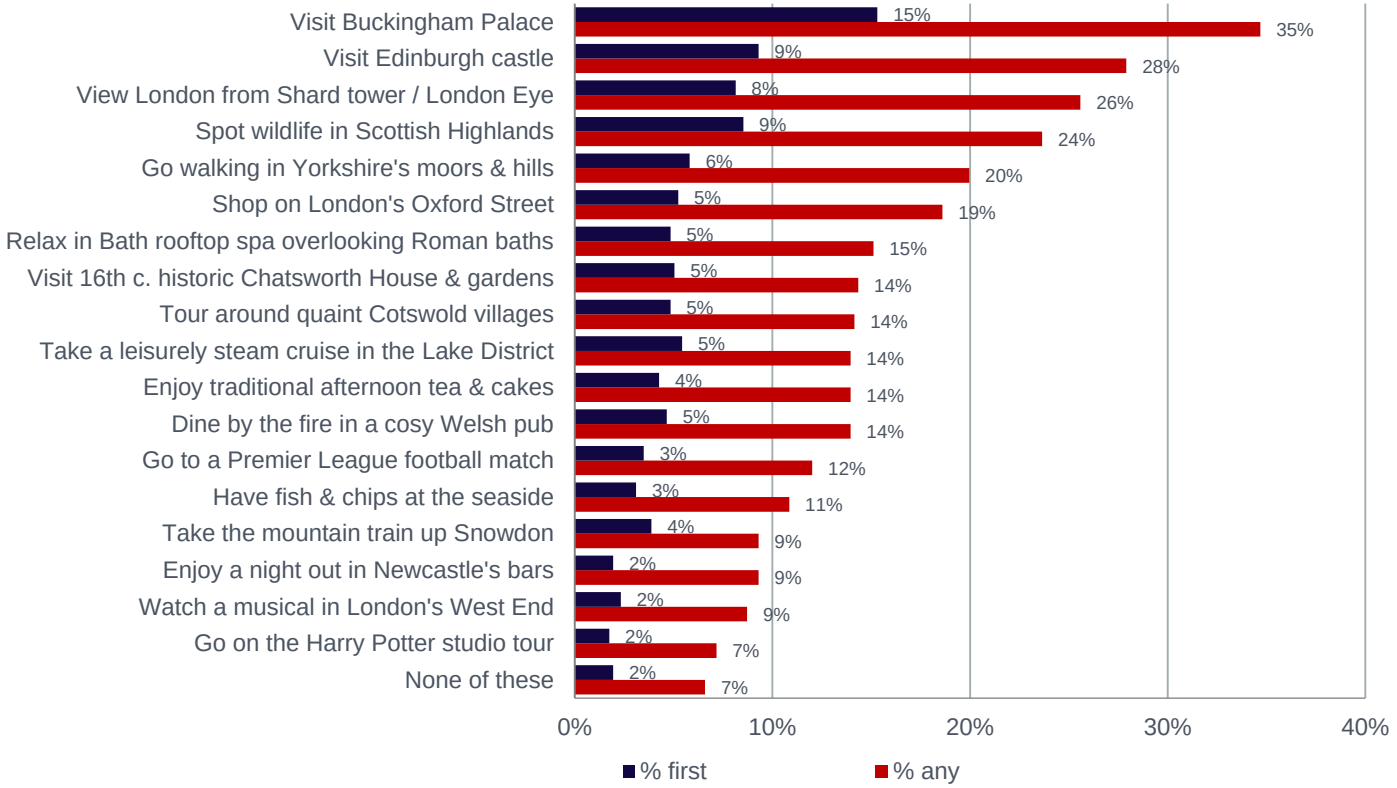
Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.5 Perceptions of Britain

Sought-after Britain activities



Source: GfK Anholt Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice

Chapter 3:

Access and travel trade

3. Access and travel trade

- Italy and Britain are well connected. 95% of visits to Britain from Italy came by plane in 2016.
- Seat capacity from Italy to Britain has grown rapidly since 2013, now at its highest level ever. Many airlines operate flights from Italy to Britain with Ryanair, easyJet, British Airways and Alitalia combined accounting for 85% of annual seat capacity in 2016.
- The regional spread of Italian visitors is supported by the connectivity to regional airports in the United Kingdom; however the North tends to be better connected to regional airports than Central and Southern Italy, with the exception of Rome.
- Italian tour operators offer itineraries in Britain covering destinations from Northern to Southern England and Scotland. Wales remains a challenge to sell in the Italian market as there are very few non-stop connections (Milan, Rome and Verona to Cardiff in 2017, some of which are seasonal).
- Generally speaking, tour operators most commonly use ground handlers in the UK.

95%

of visits to Britain from Italy came by plane in 2016

Source: Apex Rdc 2016 non-stop flights only

3.1 Access: key facts

- 95% of Italian visits to the UK were made by plane. It is a short non-stop flight: usually between 2-4 hrs flight time, depending on the departure and arrival airports.
- Annual seat capacity has shown strong growth again since 2013. 80% of annual seat capacity in 2016 from Italy came on routes to the London airports.
- Italian visitors departing Britain by air pay £13 in Air Passenger Duty.
- The regional spread of Italian visitors is supported by the connectivity to regional airports in the United Kingdom, however the North tends to be better connected to regional airports than Central and Southern Italy, with the exception of Rome.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. only included in the summer schedule.

Source: International Passenger Survey by ONS, Apex RdC 2016, non-stop flights only

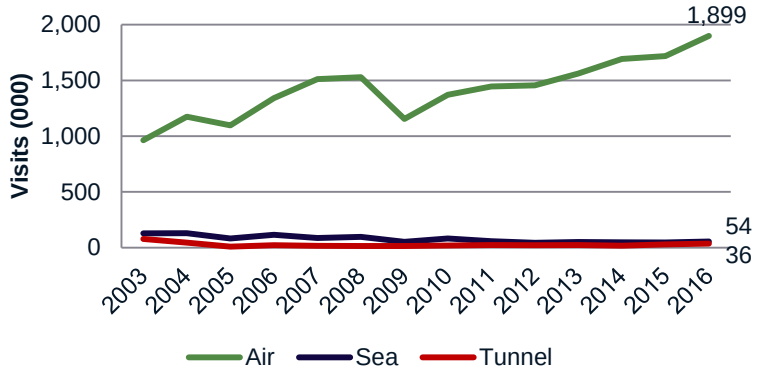
Almost all visits from Italy to the UK are made by plane.

Access to Britain

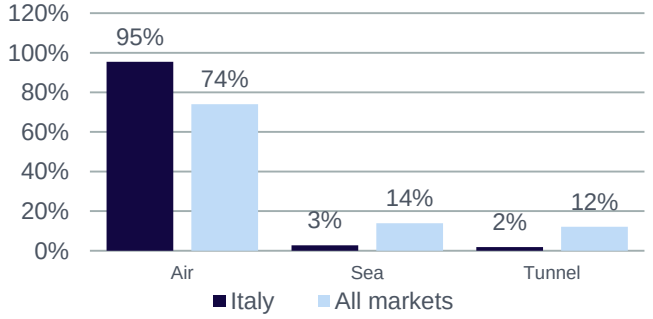
Measure	2016
Weekly aircraft departures	976
Weekly aircraft seat capacity	159,289
Airports with direct routes in Italy	28
Airports with direct routes in Britain	22

3.1 Access: mode of transport and capacity

Visits by mode of transport

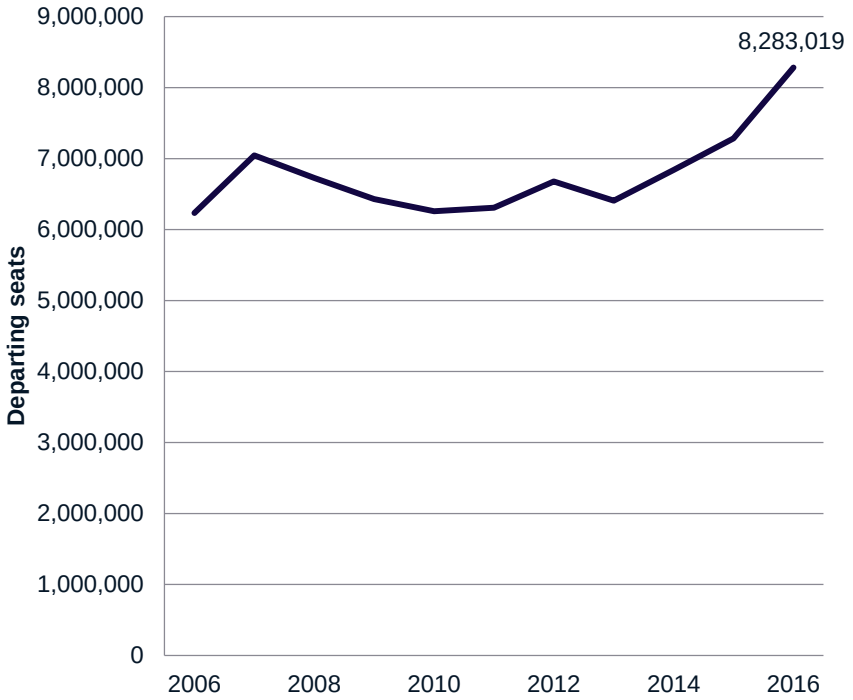


Annual share by mode (2016)



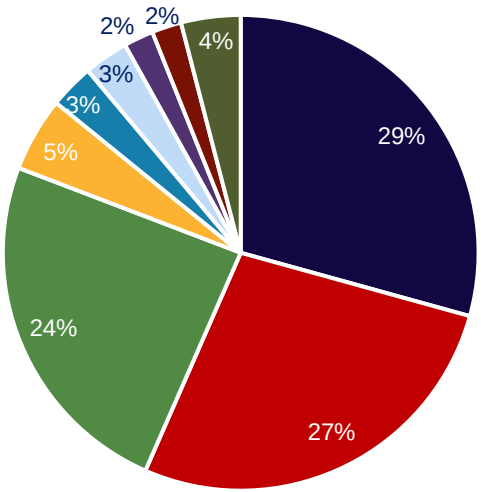
Source: International Passenger Survey by ONS, Apex Rdc 2016: non-stop flights only

Annual airline seat capacity trends



3.1 Access: capacity

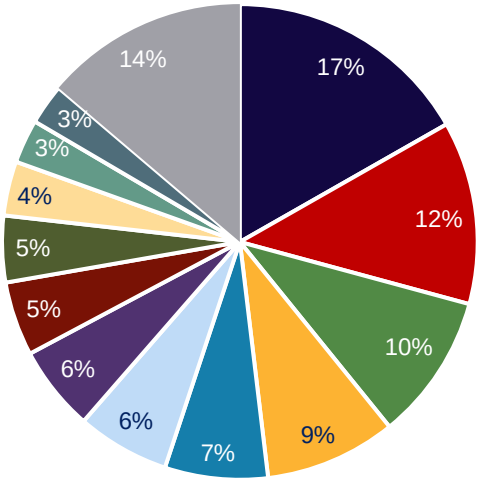
Airline seat capacity by carrier (2016)



- Ryanair
- easyJet
- British Airways
- Alitalia
- Monarch Airlines
- Thomson Airways
- Vueling
- Jet2
- Other

Source: Apex Rdc 2016: non-stop flights only

Origin airport annual seat capacity

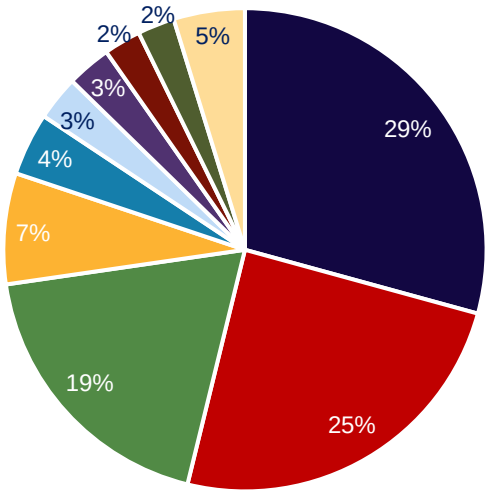


- Rome - Fiumicino
- Milan - Malpensa
- Venice - Marco Polo
- Milan - Linate
- Pisa - Galileo Galilei
- Naples
- Rome - Ciampino
- Milan - Orio Al Serio
- Bologna - Guglielmo Marconi
- Verona
- Venice - Treviso
- Turin - Caselle
- Other*

*Airports with less than 2% annual seat share grouped in other: Catania – Fontanarossa, Florence – Peretola, Bari – Palese, Genoa – Cristoforo Colombo, Palermo – Punta Raisi, Olbia – Costa Smeralda, Brindisi – Papola Casale, Ancona – Falconara, Cagliari – Elmas, Perugia – Sant Egidio, Trieste, Pescara – Liberi, Alghero – Fertilia, Lamezia Terme, Milan – Parma, Comiso.

3.1 Access: capacity

Destination airport annual seat capacity



- London - Gatwick
- London - Stansted
- London - Heathrow
- Manchester International
- London - Luton
- London City
- Edinburgh
- Bristol
- Birmingham International
- Other*

Source: Apex Rdc 2016: non-stop flights only

*Airports with less than 2% annual seat share grouped in other: East Midlands, Leeds/Bradford, Glasgow International, Newcastle, Liverpool John Lennon, Glasgow Prestwick, London Southend, Cardiff, Belfast International, Southhampton, Doncaster Sheffield, Bournemouth International, Humberside.

3.2 Travel trade: general overview

- The Italian trade structure is very fragmented with about 8,500 travel agencies. 6,241 of these are affiliated to the top eight networks.
- The trade sells Britain mainly as a short break destination during the autumn/winter season and with coach tours and holidays in the spring/summer season. London is the top destination followed by the rest of England.
- Tour operators and travel agents increasingly hold a presence on social media, mainly on Facebook.
- Online travel agencies are well established in the market. They often can be more flexible than traditional tour operators.
- English language courses are also an important selling point for the trade and Britain is the most requested destination followed by Ireland and Malta.

The Italian trade structure is very fragmented.

Sources: Guida Viaggi magazine 2016, trade feedback

3.2 Travel trade: Italian tour operators

Top operators in Italy in 2015/16

Top Ten Tour Operators	Turnover €m
Alpitour	1,141
Eden viaggi	298
Veratour	177
Quality group	121
Valtur	86
Boscolo Tours	80
I Grandi Viaggi	58

The top major tour operators with a comprehensive Britain programme are:

Sources: Lagenzia di viaggi magazine, Travel Quotidiano, ANSA, Eden travel group, I Grandi Viaggi, Veratour

3.2 Travel trade: Italian holidays

Public and local holidays

National public holidays in 2018

Date	National Holiday
1 January	New Year's Day
6 January	Epiphany
2 April	Easter Monday
25 April	Liberation Day
1 May	Labour Day
2 June	Republic Day
15 August	Assumption Day
1 November	All Saints Day
8 December	Immaculate Conception Day
25 December	Chirstmas Day
26 December	St. Stephen's Day

Local Holidays in 2018

Date	Local Holiday	Region
29 June	Saint of the city	Rome
7 December	Saint of the city	Milan

3.2 Travel trade: practical information

General practical information:

- Business hours are usually flexible; typically 09:00 – 13:00, 14:00 - 18:00. In summer a longer lunch break is common and changes the usual afternoon working hours to 15:30 – 19:30.
- Italians are very friendly and appreciate an open and welcoming approach. A firm handshake is the most traditional form of greeting. It is better to start using a person's title and surname until invited to use their first name.
- Avoid scheduling meetings before 9:00/9:30 and after 18:00 and it is best to try to avoid the summer months (mid-July until early September) as many are on holiday. It is a good idea to plan the visit before the preparation of new brochures/catalogues.
- Dress code: Business dress tends to be understated, formal and conservative.
- Business Meeting Etiquette: Appointments are mandatory and should be made in advance and reconfirmed the day before. Please phone if you get delayed and try not to cancel a meeting at short notice.
- Relationships in Italy are extremely important. Try to visit your contacts at least twice a year and keep in regular contact with them even when you are back in Britain.
- Meetings tend to vary by area: there is a tendency for them to be more informal in the south of Italy and more formal in the North. Allow time for the decision making process. It can be slow and it is good to be flexible.
- Try to provide your printed material available in Italian and English.

3.2 Travel trade: sales calls

Sales calls

The Italian trade structure is very fragmented. The main Tour Operators are based in the bigger cities, Milan, Rome and Naples, even if the structure particularly amongst small operators is very regionalised. Therefore, before you embark on a sales visit to Italy, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack about your products in Italian if possible. It is often appreciated.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.
- The planning cycles of the Italian trade tends to have a shorter turn-around time than in many other European markets: summer catalogues tend to be planned in February/March and winter catalogues in September/October.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Britain players attend the VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.

3.2 Travel trade: hospitality etiquette

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Italian business partner out for a meal or coffee – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- Credit cards are usually accepted in all restaurants (only double check with the small ones). VISA and Mastercard are commonly accepted but in some restaurants American Express cards are not accepted. In Southern Italy it is not as common to use credit cards as in other parts of the country, especially in smaller towns. It is best to bring cash if you are going there.
- Arrive on time and if possible, before the invite, as punctuality indicates reliability.
- If you order water you will be asked if you want still or sparkling mineral water.
- Bread is always served and you can order refills any time.
- Italians normally drink wine with their meals, although not always at lunch time.
- Service charge and VAT are included in the price, therefore tipping is limited. Tips are only given if you are happy with the service provided and rarely more than €5.

3.3 Caring for the consumer

Caring for the consumer

- Cleanliness is paramount and expectation levels for standards and services are high – any issues should be resolved promptly.
- Independent travellers tend to prefer good value accommodation and often opt for accommodation provided by well-known chains.
- It would be advantageous to have important signs and information material printed in Italian and to know a few basic phrases in Italian to make Italian visitors welcome. The degree of fluency in English tends to vary.

Language basics

English	Italian
Please	Per favore
Thank you	Grazie
Yes	Si
No	No
Sorry! (apology)	Scusa
Excuse me!	Mi permetta
Sorry, I do not speak Italian.	Mi spiace, non parlo Italiano.

3.3 Caring for the Consumer

Caring for the Consumer:

- Food is one of the great passions of Italian people. Their perceptions of British food tend to be below average.
- In Italy the main meal is usually dinner. A three-course dinner is usually taken at about 8pm. When eating Italian cuisine, “primo” refers to the pasta or rice course. ‘Secondo’ refers to a fish or meat dish. Fresh bread and water should be plentiful. Fresh fruit should be offered as a dessert option.
- Lunch during the week is very light with fresh salad, sandwiches or a dish of pasta is the norm. On Sunday when the family is together lunch becomes the meeting point for all to spend some spare time together. Lunch is normally eaten about 1pm.
- Last but not least a good meal tends to finish with an excellent espresso (usually short and strong) sometimes with fresh milk.
- Italians tend to generally be conservative eaters and when travelling abroad choose to eat simple British fare or Italian food. The younger traveller has a higher propensity to sample a wider variety of options including ethnic and Asian cuisine.
- Italy is one of the most important vegetarian markets in Europe; it is recommended to have vegetarian dishes in the menus. There is increasing interest in health and nutrition in daily life.
- Many Italians love wine but they often are not large consumers of alcohol, and excessive drinking tends to be frowned upon. In Italy it is impolite to fill a glass too full.

3.3 Caring for the consumer: Italian language tips

Language tips for arrival and departure

English	Italian
Hello	Ciao
My name is…	Il mio nome è...
Welcome to Britain	Benvenuto in Gran Bretagna
Pleased to meet you!	Piacere di conoscerti
How are you?	Come stai?
Enjoy your visit!	Goditi la visita!
Goodbye	Arrivederci
Did you enjoy your visit?	Ti è piaciuta la visita?
Have a safe journey home!	Buon rientro!
Hope to see you again soon!	A presto!

3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specifc-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Italian or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly
(Email: research@visitbritain.org)

3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain https://www.visitbritain.org/understanding-international-visitors
- Technology and social media https://www.visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour

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November 2017